



JENZABAR **CX**

**CX**

# Getting Started

User Introduction

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# Introduction to CX

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Jenzabar CX (also referred to as “CX”) provides administrative computing solutions for colleges and universities, using a single relational database and a variety of programs that meet the specific needs of post-secondary institutions. Specifically, CX features the following functional areas:

- Enrollment Management (Recruiting and Admissions)
- Student Services
- Registration and Course Maintenance
- Financials
- Financial Aid
- Institutional Advancement
- Human Resources
- Facilities Management
- Information Management

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## About This Guide

This guide serves as a learning tool and a reference guide for basic system features and functions. It contains introductory information and general topics that relate to all the offices on an institution’s campus.

This guide is for use by menu users in every campus office who perform data entry operations. Menu users include the track coordinator, administrative assistants, and operators.

## Learning Objectives

Using this guide, you will be able to:

- Navigate the menus in Jenzabar CX
- Identify and use the different kinds of screens in Jenzabar CX
- Schedule multiple tasks and processes
- Use electronic mail to communicate with others on your campus and in other locations (if applicable)
- Enter data into the system
- Locate data
- Use the basic menu options
- Identify the resources you can use to communicate with Jenzabar and with other CX users



## How to Use This Guide

This guide contains a section for each main topic. If you are not familiar with CX's functions and features, read each section of this guide for detailed information. If you are familiar with Jenzabar CX, and just need information in a particular area, look through the Table of Contents or Index and refer to the pages you need.

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## Conventions Used in This Guide

Jenzabar has established a set of conventions to help you use this guide. The conventions presented below are not exhaustive, but they include the more frequently used styles and terms.

Jenzabar guides observe the following style conventions.

### **Boldface type**

Represents text that you type into the system (e.g., Type UNDG.) and command names or keys you use to execute a command or function (e.g., Finish).

### **Bulleted list**

Show items not ranked or without a sequential performance.

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### **CAUTION**

Indicates a caution or warning of a potential risk or condition.

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### **<Enter>**

Represents the Enter, Return, Line Feed, or ↵ key on your keyboard.

### **Italic type**

Is used in any of these ways:

- To represent a new or key term
- To add emphasis to a word
- To cross-reference a section of text
- To represent a variable for which you substitute another variable (e.g., substitute filename with an appropriate filename)

### **<Key name>**

Represents a key that you must press (e.g., <F1>).

**Note** Indicates a note, tip, hint, or additional information.

### **Numbered lists**

Show ranking of items or sequence of performance.

### **Parentheses**

When used around a field name, indicate the field is unlabeled. The field description includes the location of the field.

### **Quotation marks**

Represent information written in this guide exactly as it appears on the screen (e.g., the message, "Now Running..." appears.).

### **Jenzabar CX-Specific Terms**

The following list identifies term conventions used in this guide.

**Application**

A group of one or more software programs that enables you to perform a particular procedure, such as entering student information.

**Data**

Specific information you enter into fields on a particular data entry screen.

**Enter**

To type information on a keyboard and execute by either of the following actions:

- Pressing the <Enter> key
- Clicking on the OK button
- Selecting Finish

**F key**

Any of the function keys located on your keyboard (e.g., <F1>).

**Hot key**

The capitalized and highlighted letter of a command on a ring menu.

**ID**

The number assigned to each student or organization associated with your institution (e.g., 12345).

**Parameter**

A variable in the system that is given a constant value for a specific application (e.g., a date can be a parameter for producing a report).

**Select**

To execute a command by any of the following actions:

- Performing the keystrokes
- Pressing the hot key
- Highlighting the command or option and pressing the <Enter> key
- Clicking the mouse

**System**

The Jenzabar product, CX (or Jenzabar CX).

**Keystrokes**

When you see two keys separated by a dash (e.g., <Ctrl-c>), hold down the first key (<Ctrl >) while pressing the second (<c>).

**Capitalized Words**

In Jenzabar guides, the first letter of each word in a command, option, field name, or menu or screen title is capitalized to set those terms apart from regular text.

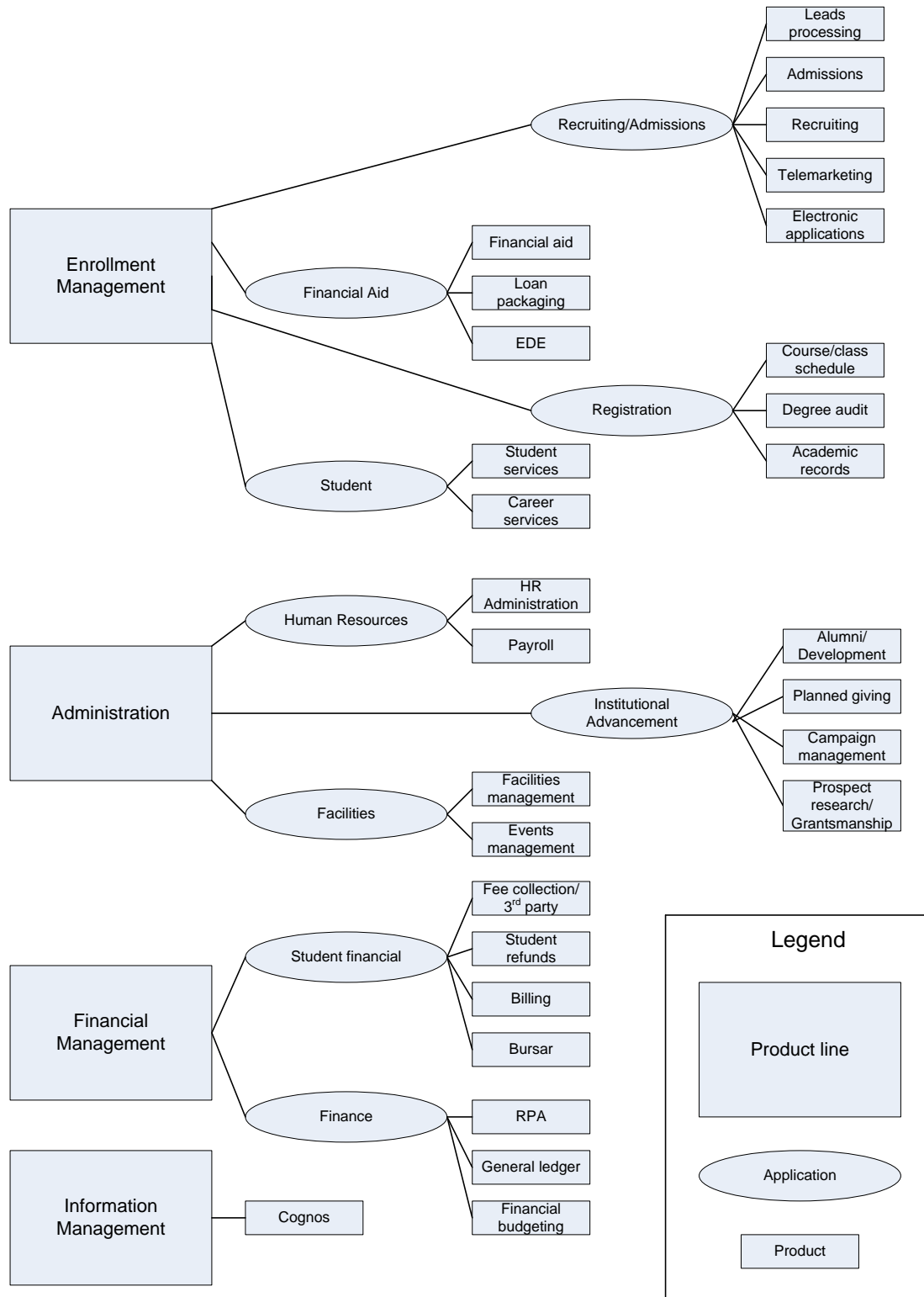
## Other Information Resources

Since this guide is introductory, it does not provide detailed instructions about processing specific types of information or performing particular tasks. The following lists and describes the other sources of information you, your computer center staff, and your Jenzabar coordinator can use with the system.

For more information about...	See:
Screen, field, and command descriptions Error message information	<i>Jenzabar CX User References</i>
General process descriptions Procedures for completing tasks	<i>Jenzabar CX User Guides</i>
An implementation task list Individuals responsible for implementation Resources to use for implementation Implementation procedures	<i>Jenzabar CX Implementation Guides</i>
Process and program flows Maintenance procedures System failure recovery	<i>Jenzabar CX Technical References</i>
Database administration SQL usage Error messages Tutorials	<i>Informix Manuals</i>
Conversion UNIX MAKE processor Text Editors Screen modifications Software Modification Orders (SMOs) Product Updates	<i>Jenzabar CX course manuals</i>

## Jenzabar CX Product Structure

The following diagram shows the Jenzabar CX product lines.



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## Before You Begin Using Jenzabar CX

This section provides the following:

- A summary of the overall Jenzabar CX functions and features
- A description of the ways institutions can customize CX to meet their unique needs
- A checklist of information you need to know and tasks you need to perform before using CX
- Login and logout information
- Background knowledge you must possess to use CX

### Purpose of Jenzabar CX

The primary purpose of the system is to enable you to enter, maintain, and report information about your institution's applicants, students, alumni, employees, and financial transactions.

### Customizing Techniques for Jenzabar CX

Although the institutions that use the system share a variety of reporting and processing needs, each institution also has unique requirements. For example, in the accounting area, an institution's account numbers can be completely different from every other institution.

The basic features of CX address the common needs that most institutions share. For example, the system provides a variety of standard reports that every institution can use. However, to meet your unique requirements, CX can be customized in the following ways:

#### Menus

The Jenzabar CX menu is completely customizable. Users can see a subset or any combination of menu items depending on the permission group or groups to which they have been assigned by the system administrator. Users needing access only to menu items within a given functional area, such as Registration or General Ledger, can be granted access to just those menu items. However, individuals needing access to additional functional areas or individual menu items outside their normal functional areas can be granted access to those items as well. This approach simplifies the screen and eliminates the need to continually re-enter passwords to gain access to certain screens.

#### Tables

Jenzabar CX is table-driven. In a table-driven system, you enter your unique codes, structures, and policies in tables, and the system accesses the tables to obtain the values it needs to process. For example, the system obtains your unique account numbers from tables.

#### Macros

The system can also be customized with macros that control some processing capabilities. When your Jenzabar coordinator enables or disables macros, various features and menu options become available or are removed.

Macros also let you define the default values that appear on some screens, which can save you time and make sure only approved or valid values are used.

**Screens**

Another customization method your institution can use is to reformat the screens that you use to enter data so that they look like your institution's unique data entry forms. Your Jenzabar coordinator usually performs this type of modification, sometimes with the help of Jenzabar personnel.

**Reports**

Your Jenzabar coordinator (or Jenzabar consultants) can create new reports or customize existing reports to meet your reporting requirements.

**Programming (Consulting)**

Lastly, if your processing needs are so unique that they require additional computing capabilities, your Jenzabar coordinator or consultants from Jenzabar can make programming changes to accommodate your needs.

Changes to the standard system, including screen modifications and customized programming, are called local modifications, or *locals*.

## Screen Differences

This guide (as well as other Jenzabar CX guides) contains examples of screens and reports based on the standard product. Because your institution may have modified some of the screens and records in the system, the screens and reports that you see on your screen or in hard copy may differ from those in this guide.

## PrerequisiteTasks

Use the following checklist to ensure that you have reviewed all required tasks before you begin using the system:

- Ensure that the Jenzabar coordinator has set up a login for you.
- Learn your login name.
- Learn the password that you must use to login to the system.
- Learn how the system users at your institution login and logout from the system.
- Identify the individuals to whom you can refer questions or problems.

## Background Knowledge

The following lists and describes the necessary background information that you should know.

**Authorized Personnel**

Know the answers to the following questions:

- Who is authorized to enter ID information?
- Who is authorized to access online ID information?

**Important dates**

Know when the following occur:

- Report deadlines
- End of the institution's fiscal year
- Registration dates

**Your institution's policies and procedures**

Know the answers to the following questions:

- Who can provide assistance when you have questions about the applications you use?
- What permissions do you have for accessing the CX screens and processes?

**System modifications**

Know the answers to the following questions:

- What changes have been made to CX to accommodate the unique requirements of the institution?
- How do the changes impact the way to complete procedures?

## System Processes

The following lists and describes the overall processes involved in using CX.

**Note** The process shown below is an example and is not intended as policy guidance. Your institution's process may vary.

1. Track information about leads, applicants, and other inquiries.
2. Identify the applicants that have been accepted and admitted.
3. Process the financial aid requirements for each student.
4. Register each student for classes.
5. Record housing information and fees for each student.
6. Complete billing for each student, and record receipts for each payment.
7. Produce financial reports as required.
8. Contact alumni and other friends and constituents as required and process gifts.
9. Produce reports and meet ad hoc requests for information as required.

## Launching the Application

There are two ways to launch CX: through your institution's internal website or through a shortcut icon on your own desktop system. The first two times you launch CX, you must launch it from your institution's intranet.

To launch CX from your institution's internal website, do the following:

1. Open an Internet browser, such as Microsoft Internet Explorer.
2. Point your browser to your institution's internal web page. The URL must be provided by your Jenzabar Coordinator.

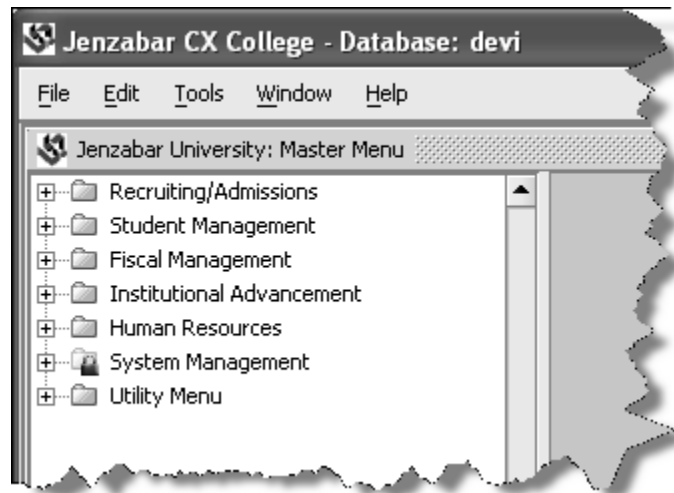
3. Under “Administrative Links” on the right-hand side of the web page, click on “Launch Jenzabar Next-Gen.”
4. If a virus notification dialog box appears, click on the “Open” button.
5. Enter your username and password in the login dialog box.

After you have launched the application this way twice, Java WebStart recognizes that you use this application frequently and invites you to install a shortcut icon on your desktop. Upon your third launch a dialog box will appear asking whether you wish to install this icon. Select “Yes.” Having this icon on your desktop will streamline launching by eliminating the need to open a browser and navigate to the internal web page first.

**Note** The system keeps the user's application files in sync with the files on the server. If the core system has been updated, at launch a window appears indicating that new files are being downloaded and showing the progress of the download. After the download is complete, the Jenzabar CX screen will appear and you will be prompted to enter your user name and password.

To launch CX from your desktop, double-click the Java WebStart icon “Jenzabar Next-Gen” on your desktop. When the “Logon” dialog box appears, enter your username and password and click “OK.”

After CX has completed launching, you see a large window containing information resembling the following:



Note that the above screen segment has not been customized for your institution's name, nor does it show the menu options you are likely to see when you launch the system; however, the basic components of the screen should resemble the example.

In front of the large window with the master menu and command menu (resembling the above), you will see a smaller window entitled “SSH Message Console.” This window provides the date of your last login and information about your server. During your session, it may also provide other system-related messages. However, for most purposes, you will not need to work with this window. Minimize it by clicking on the orange “Minimize” icon to the left of the screen title or by clicking on the Java icon (shaped like a steaming coffee cup) to the left of the screen title and selecting “Minimize” from the pop-up menu.



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## Exiting the Application

To exit Jenzabar CX, first make sure all of the application windows you worked with are closed. To close a Jenzabar CX window, go to the File menu and select **Close**, or click on the red button at the far right of the screen heading. Do NOT click on the Windows <Exit> button in the top right-hand corner of the menu window.

When you have closed all of your windows, click on the Jenzabar CX File menu and select **Logout & Exit**.

---

## Producing Standard and Customized Reports

Jenzabar CX contains reports, rosters, and forms to support its various functions. For example, you can produce statements for students, financial reports, and lists of donors, class enrollments, and applicants.

Because CX is table-driven, you can also produce reports that contain the table values that your institution uses.

You can access and run reports from the menus to which they relate. For example, table reports appear on the Table Maintenance menu, and student schedules (Student Data Sheets) appear on the Registration menu. A variety of reports appear on the Reports menu, including, for example, enrollment reports, financial aid reports, gift ledgers, invoice forecasts, financial statements, and appointment schedules.

The initial screen that appears when you select a report prompts you to enter any required parameters for producing it. For example, to produce a financial aid report, you enter the financial aid award year, and to produce a Balance Sheet financial statement, you enter the range of accounts that you want to include and the format that you want to use.

Jenzabar provides several solutions to serve your reporting needs. In addition to standard reports located on the various menus, your institution can choose from a variety of reporting tools. Below is a listing of the different reporting tools available to you.

### ACE Reports

The standard reports located in the CX menu system. You can access and run ACE reports from the menus to which they relate. For example, standard Admission reports appear on the Admission Reports menu.

You can create customized ACE reports from any CX menu, using the Word Processing menu option (select **Tools>Word Processing** from the command menu across the top of the screen frame). To create and use ACE reports, you must complete the following procedure.

**Note** For more information about the use of WPVI, see the Jenzabar's *Communications Management User Guide*.

1. From the WPVI Cabinet list, select the appropriate functional area, (e.g., Recruiting and Admissions).
2. At the WPVI Drawer level, create drawers with the following reserved names:
  - reports (for standard reports)

- wpreports (for letters)
- 3. Use the sample format that WPVI creates in either the reports or the wpreports drawer to create customized reports.
- 4. Run the reports you create from the Utilities: Letters/Labels and Reports menu.

### Cognos

The optional addition of Cognos gives you a number of database query and reporting applications, including the following:

- **Query Studio** to create simple queries and ad hoc reports, modify existing ad hoc reports, apply basic formatting, and save results in a number of formats (such as PDF) to make them viewable by others.
- **Report Studio** to build sophisticated multi-page, multi-query reports against multiple databases, modify existing reports, and save results in all the formats available to Query Studio.
- **Analysis Studio** to apply advanced online analytical processing (OLAP) to isolate trends and answer operational questions.
- **Transformer** to create Power Cube models for use with Analysis Studio.
- **Framework Manager** to create and manage metadata for analysis and reporting.
- **Event Studio** to set up agents that monitor data and perform tasks to handle data exceptions and other events.

For more information on Cognos, see [www.cognos.com](http://www.cognos.com).



# Menus and Navigation Trees

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The purpose of this section is to introduce you to the access and use of the CX menu and navigation structure, and to acquaint you with the ways you can move about the system.

Refer to this section when you have questions about navigating the system.

The navigation tree is the primary interface between you and your system, and replaces the menu in previous versions of CX. It provides you with the following types of processing choices:

- Application choices (e.g., choosing between report processing and data entry for the particular office in which you work)
- Tools (e.g., utilities for changing your password or maintaining your electronic files)
- Reports, grouped by functional area

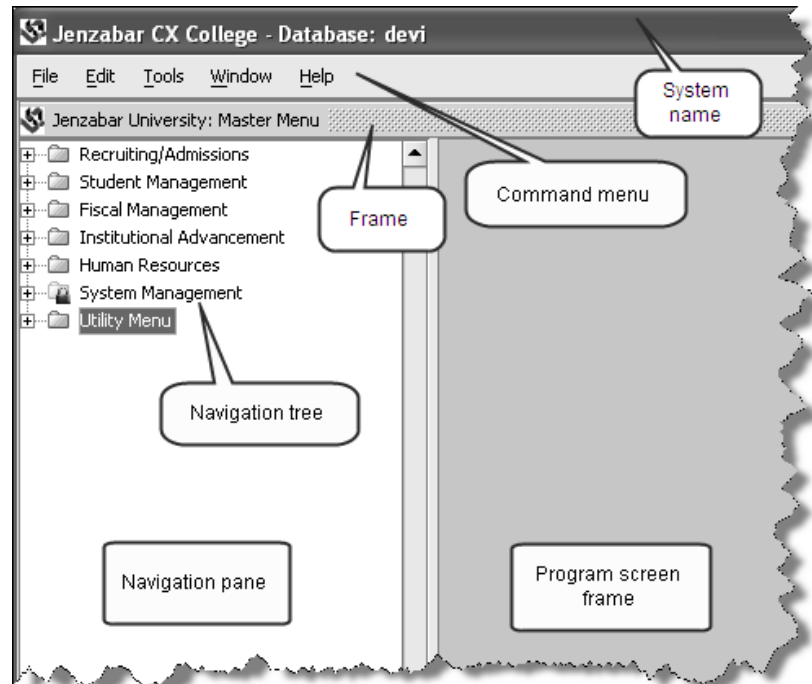
The example navigation trees in this section represent those contained in the CX standard product. If your institution adds to, rearranges, or deletes options on these trees to meet its specific needs, the trees you see on your screen will look different from those shown in this guide.

In addition, most institutions customize navigation trees so the workers in each office see only the options that they must use to perform their jobs. For example, employees in the Financial Aid office will not see the options that relate to Institutional Advancement activities. This practice is another reason your navigation trees may not match the trees you see in this guide.

In contrast, more general purpose commands are available from the command menu that runs horizontally above the screen frame. It includes the following:

- File – Enables you to exit the system or close an open application window.
- Edit – Enables you to perform standard Windows editing tasks, including cut, copy, and paste; also enables you to expand or collapse selections in the navigation tree.
- Tools – Provides access to mailx (or other default mail server) and to WPVI word processing, opens the list of scheduled processes to be viewed, edited, or run, and enables you to test customizations and set logging levels.
- Window – Displays a list of open screens from which you can select the desired application to use.
- Help – Opens help topics related to the system (e.g., obtaining information about the menu options)

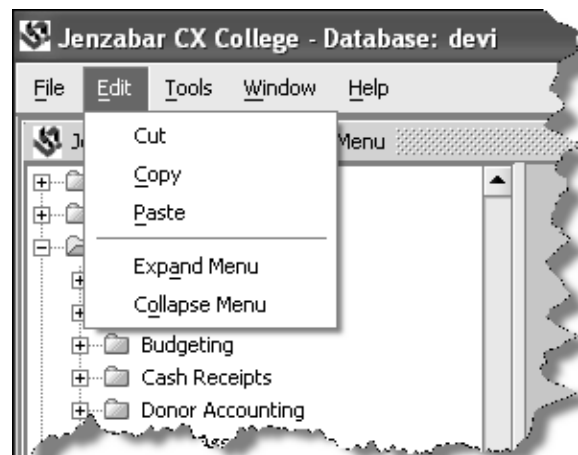
The layout of the CX screens (including the frame, system name, navigation pane and tree, and command menu, resembles the following:



## Accessing the Commands and Menus

### Command Menu

The Jenzabar CX command menu appears along the top of the screen. Clicking on any of the menu names reveals a list of commands you can execute, assuming you have appropriate permissions. An example of a command menu (in this case, the Edit menu) follows:



### Selecting Menu Options












To select a menu option, click and release the mouse button on one of the menus at the top of the screen. A pop-up submenu of options appears. Options with

submenus of their own have small black triangles to the right of the name. To display a submenu, simply slide the mouse pointer (without clicking) down to the option you want to expand. Another pop-up menu appears to the right of the previous menu.

To select an item from a pop-up menu, slide the mouse pointer to the desired option and click once.

## Selecting an Option from the Navigation Tree

The navigation tree is the method by which you can access the various CX system components you use to perform your daily tasks. Each item on the navigation tree is associated with an icon; the icons signify the following:

-  Data entry
-  Expandable folder
-  Expanded folder
-  Form
-  Informer
-  Java application
-  Letter
-  Locked folder
-  Locked menu option
-  Process
-  Program
-  Report

If the option is an unknown type (that is, if the option has been added by your institution and not designated as a certain type), it will be associated with an icon resembling the following:



## Selecting an Option in Error

If you make a mistake in selecting an option from the navigation tree, the system provides easy ways for you to undo your selection error.

If your error results in the display of a program screen, you can cancel by pressing the <Esc> key or clicking on <Esc> to abort the selection.

If your error results in the display of a configuration screen, go to the File menu and select **Close**, or click on the red button at the far right of the screen heading. Do NOT click on the Windows <Exit> button.

# Using Scroll Screens

## Introduction

Scroll screens, also called “detail windows” are small windows that typically overlay a data entry screen. They provide a particular kind of information about an entity. For example, an incoming freshman applicant to your institution would indicate a variety of interests from high school; each of the interests would be stored in an individual Interest record in your CX database, and the interests would appear on a scroll screen. A query for a student who only had two interests would show a scroll screen with two rows only. An example follows:

The screenshot shows a window titled "Interests" with a small icon on the left. The window contains a table with three columns: "Code", "Description", and "Comment". The "Code" column has dropdown menus. The "Description" column contains text. The "Comment" column contains text. The table shows two records. The status bar at the top right indicates "Record 1 of 2".

Code	Description	Comment
VET	Veterinary Medicine	worked as vet tech
YRBK	Year Book	editor in senior year

In contrast, a student with eight interests would show a scroll screen with eight rows (only six visible at a time), as shown below:

The screenshot shows a window titled "Interests" with a small icon on the left. The window contains a table with three columns: "Code", "Description", and "Comment". The "Code" column has dropdown menus. The "Description" column contains text. The "Comment" column contains text. The table shows eight records. The status bar at the top right indicates "Record 1 of 8".

Code	Description	Comment
ARCH	Archery	team capt. jr and sr yr
BASE	Baseball	spectator only
DANC	Dancing	ballet
FCHR	Female Chorus	sings alto
MUSI	Music	classical
THEA	Theatre	acted in 3 HS plays

## Accessing Scroll Screens

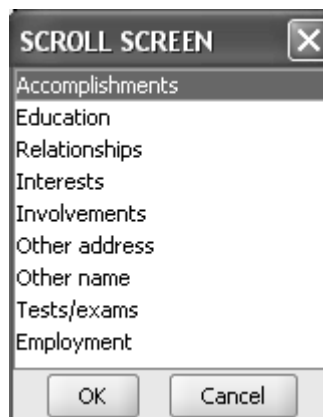
The following procedure explains how to open the scroll screens from which you access an applicant's accomplishments, education, relationships, Interests, involvements, other addresses, other names, tests and exam information, and employment. Similar scroll screens are available via ID entry programs throughout the system.

The example information accessed as follows is available if the applicant has entered the information during the application process.

1. Select New Elec Submissions, Rejected Elec Submissions, Partial Elec Submissions, or Elec Submissions on Hold based on which application group you wish to review. The selected Elec Submissions Parameters screen appears.
2. Select the desired parameters or accept the default values.
3. Select **Finish**. The first of the selected electronic submissions appears. This record displays applicant and inquiry information as received from your school's electronic source (e.g., the World Wide Web) or CRM Candidate.

**Note** You cannot view the admissions information for an applicant if the information gathered from the electronic application has already been added to the database by the electronic application program. You can only view this information for applicants whose information has not yet been added to the database.

4. Select **Scroll** from the Commands menu or click the scroll icon to view a list of scroll screens. The list resembles the following:



5. Select the type of information you wish to view from the list. If the information is available, a window will open in which you can view it.



# Screen Displays and Commands

The purpose of this section is as follows:

- To introduce you to the types of screen displays in Jenzabar CX
- To describe the differences and similarities of screen displays in the GUI format and the character-based format

## Screen Display Types

The following are the types of screens that are used by the various components of Jenzabar CX.

Screen type	Description
Rule definition screens	Java-based screens that you use for some data entry functions, including most table maintenance.
Program screens	Jenzabar-created screens that you use for some data entry functions and program execution.
Scroll screens	Jenzabar-created windows that you use to view or enter one or more records associated with a particular type of data. The windows overlay program screens and are also called detail windows.
Pop-up windows	Boxes that do not occupy the entire screen display, but instead may overlay a part of another screen or window. Pop-up windows typically appear when a process is complete, an error has occurred, or the system is communicating information to the user.
Web pages	Jenzabar-created screens that any PC user with appropriate permissions can use for data entry or data retrieval.

## Screen Components

The following lists and describes the CX screen components in alphabetical order.

### Command button

Graphical buttons, placed within the actual screen area itself or on a command line at the top of a screen, which execute processes. Command buttons are most common on Web pages, rule definition screens, and program screens.

### Command menu (or menu bar)

Typically the second or third line on a graphical screen (program screen or Web page) that contains drop-down lists of commands or screens.



**Comment line**

A line at the bottom of the screen that provides information about the processes that occur within the system, as well as field entry requirements.

This line also provides the following type of help when you are entering data:

- On program screens, the comment line contains an expanded description of the field in which the cursor appears. As the cursor moves, the comment line changes.
- On program, the comment line contains valid values, where applicable. For example, if you can complete a particular field with A, B, or C, the comment line provides this information.
- On program screens, pop-up windows, and detail windows, the comment line indicates whether you can use table lookup to obtain field values. For example, valid state codes appear in the State table. If you must enter a state code, table lookup prompts you on how to view a list of valid codes and to select one of the codes for the field.

**Error line**

A line at the bottom of program screens that describes an error condition that exists in the field or the process.

This line sometimes serves as a second comment line.

**Field labels**

On every type of screen, a brief description of the content of the adjacent area of the screen, (e.g., Name). In rare cases, labels are omitted because they relate to display-only fields or because the screen does not have room for the label and the field is self explanatory; in such cases, the documentation for the related field will appear in parentheses ( ( ) )

**Fields**

On every type of screen, the area into which you enter or view information, (e.g., the 24-character area in which you can enter a student's name).

Fields can be required or optional, with default or view-only information.

**Menu bar**

The line that provides access to pull-down menus or commands. The standard commands that appear on the menu bar are File, Edit, Command, and Help.

**Pop-up window**

A feature of detail windows, web pages, and program screens, the means by which messages are shown to the user.

**Screen title**

The name, or label, for the screen that usually appears in the center of the third or fourth line.

In Jenzabar's user references, all screen sections list the screens and their fields in alphabetical order.

Some screens you use for extensive data entry (or those that contain a large number of fields) do not display a screen name. Your user references call unnamed screens by titles relating to their purposes. For example, the main screen in the General Ledger program *Voucher* does not display a title. The screen's purpose is to create journals and journal entries. Therefore, Jenzabar's *General Ledger User Reference* refers to this screen as the Journal screen.

## Scrollbars

A navigational aid that enables you to scroll through information that does not fit on the initial display. Scrollbars can be either vertical to let you navigate through all the elements on a list, or horizontal to let you see a wider display of information.

## Toolbar

A row at the top of the screen that contains command buttons and icons.

## Screen Example

The following screen example illustrates some of the most common screen components.

The screenshot shows a window titled "Admissions Entry - ID Form". It features a menu bar with "File", "Edit", "Commands", and "Help". Below the menu is a toolbar with icons for search, print, and exit. The main area contains a form with the following fields and labels:

- Screen title:** "Admissions Entry - ID Form"
- Command buttons/toolbar:** Search, Print, Exit
- Command menu:** File, Edit, Commands, Help
- Field label:** "ID No:"
- Field (display-only):** "13581"
- Field label:** "SS No:"
- Field (display-only):** "391-53-0408"
- Field label:** "Add Date:"
- Field (display-only):** "01/12/2006"
- Field label:** "Last Update:"
- Field (display-only):** "02/06/2009"
- Field label:** "Telephone:"
- Field (for data entry):** "606-666-5518"
- Field label:** "Title:"
- Field (display-only):** "MS" (dropdown)
- Field label:** "Name:"
- Field (display-only):** "Brown, Abijah"
- Field label:** "Suffix:"
- Field (display-only):** "" (dropdown)
- Field label:** "Address:"
- Field (display-only):** "332 Prentice Drive"
- Field label:** "City:"
- Field (display-only):** "Harrodsburg"
- Field label:** "State/Zip:"
- Field (display-only):** "KY" (dropdown)
- Field (display-only):** "40330" (dropdown)
- Field label:** "Country:"
- Field (display-only):** "USA" (dropdown)
- Field label:** "Deceased:"
- Field (display-only):** "N" (dropdown)
- Field label:** "Sex:"
- Field (display-only):** "F" (dropdown)
- Field label:** "Correct Address:"
- Field (display-only):** "Y" (dropdown)
- Field label:** "Address Code:"
- Field (display-only):** "PERM" (dropdown)
- Field label:** "Date:"
- Field (display-only):** ""
- Field label:** "Comment/error line"
- Field (display-only):** "ADMISSIONS ENTRY"

## Using the Commands

Jenzabar user guides identify commands and options by name rather than by letter or icon. This table lists some examples of how you should respond, according to what you see on the screen and what you read in this and other CX user guides.

Appears next to icon (or as mouseover help):	User Guide says:	Your action:
Execute	Select <b>Execute</b>	Click <b>Execute</b> or press <F9>
Cancel	Select <b>Cancel</b>	Click <b>Cancel</b> or press <Esc>
Locate	Select <b>Locate</b>	Click <b>Locate</b>

## Using the Commands Pull-Down Menus

Jenzabar CX screens have menu bars. The menu bar typically contains the standard options, including File, Edit, Commands, and Help, and may contain other options as well depending on the application. When you click on the option, a pull-down menu of commands related to the option appears.

When you click on the drop-down elements on the menu bar, you display all the commands or features you can access or use on the screen. The commands vary depending on the screen that you are using and the program mode in which you are processing. To execute a command, you can use your mouse to highlight the command, and then click.

The pull-down menus also display the keystroke(s) (if applicable) that you can use to execute commands if you prefer keyboard input to mouse point-and-click command selection.

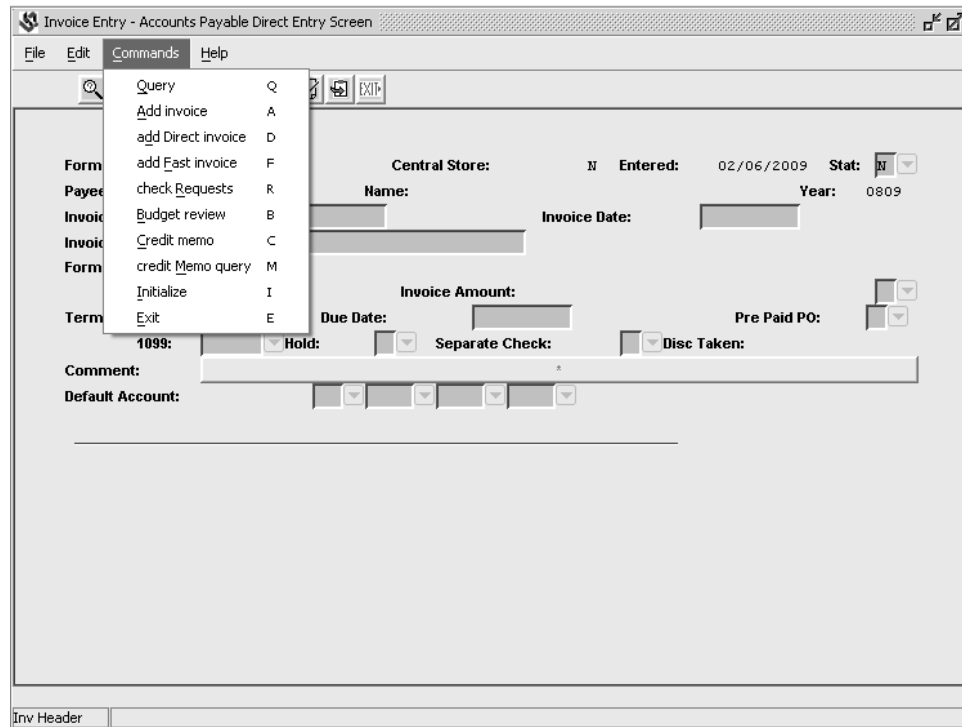
### Example of the Commands Pull-Down Menu

Following is an example of a Commands pull-down menu from the Accounts Payable program. In this example, the command line contains the same commands that appear in the Commands pull-down menu, and the pull-down menu overlays part of the command line.

In this example, you can select each command in three ways:

- Click on the icon (e.g., the "Query" icon).
- Click on the command on the Commands pull-down menu (e.g., "Query").
- Use the keystroke that appears on the Commands pull-down menu (e.g., <Q>).

**Note** To use the keystroke, you must first click on **Commands** to open the pull-down menu, and then press the corresponding key.



## Command Keystrokes

The keystrokes listed in this section relate only to the Jenzabar CX program screens, and typically not to web pages.

### Keystroke Comparison List

The following is a list of the commands with their respective keystrokes.

- Abort/Cancel: <Esc>
- Add a line: Add Line (or <Ctrl-o>)
- Context-sensitive help: <Shift-F1>
- Delete a line: Del Line (or <Ctrl-e>)
- Done/Execute/Finish: <F9>
- Exit/Bye: E (or B)
- Fast Back: Page Down (or <Ctrl-b>)
- Fast Forward: Page Up (or <Ctrl-f>)
- Field level help: <Ctrl-F1>
- Next field: <Tab>
- Program-defined key: <F8>
- Program-defined, GUI-based help: <F1>
- Query/Lookup: <F6> (<Ctrl-t>)

- Restore previous value: <F7> (<Ctrl-p>)
- Tab (program-defined): <F3>
- UNIX program-based help: <Ctrl-w>

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## Using Rule Definition Forms

Rule definition forms are a type of screen used for some data entry functions, including most table maintenance.

Although the contents of these screens can vary, the command lines are the same.

### Uses of Rule Definition Forms

Jenzabar uses rule definition forms for two primary purposes:

- For the entry of table information. Such forms typically have two parts: One for the search criteria, and one for the result set.
- For completion of queries that require information about more than one person or record, (e.g., when you need to obtain counts of individuals for whom a particular record exists on the CX database). You use rule definition forms for this type of query when you select Query by Form from the CX menu. Forms of this type typically have three parts: One for the search criteria, one for the result set, and a middle section with additional details about the selected result.

### Rule Definition Form Examples

The following is an example of a rule definition form with two parts:

Code	Description	Display on Web
SALU	Salutatorian	Y
SAP	Senior Academic Plaque	Y
SSP	Senior Scholarship Pin	Y

Ready 3 records returned

The following is an example of a rule definition form with three parts:

Function	Primary Resp	Secondary Resp
1001		
1002		
1003		

Code	Description	Primary Resp	Secondary Resp
ABC	Art/Biology/Chemistry	1022	1044

View mode 1 records returned

The following is an example of a three-part form used for queries:

**Jenzabar CX College - Database: dev1**

File Edit Tools Window Help

Add [F2] Search [F3] Edit [F4] Delete [Del] Save [F5] OK [F7] Cancel [F6]

ID No: 104 SS No: 307-79-0862 Add Date: / /

Name: Boyler, Edward Title: Mr. Last Update: 04/01/2008

Address: 422 Merland Rd. Address line 2: Telephone: 8036483944

City: Granville State: Ohio Zip:

Country: UNITED STATES Deceased: N Correct Address: Y

Alternate Address Code: PERM Office Added: ADM

Profile Record: Marital stat: S Sex: M Ethnic: WH

Secondary Address: Veteran: Y Birthdate: 07/04/1963 Last Update: / /

Denomination: Church Id: 0

Occupation: Blank Handicap: Visa Code: B-1

Residence Country: Residence State: Residence Country:

Birthplace City: Birthplace State:

1st Home Newspaper: 0

2nd Home Newspa...: 0

Add Edit Delete [Del] Save Cancel

ID No	Name	SS No	Add Date	Last Update	Telephone	City	State	Country
104	Boyer, Edward	307-79-0862		04/01/2008	8036483944	Granville	OH	USA

View mode 1 records returned

## Modes

Four modes are possible on rule definition forms:

1. Add
2. Search
3. Edit
4. View

The Add, Search, and Edit modes are activated by clicking on those buttons in the toolbar (command line). The View mode is activated after you have performed a search and selected one of the resulting records, causing details of that record to be displayed on the upper part of the screen.

You can tell which mode you are in by looking at the bottom right portion of the screen; the mode appears in the second box from the right side, as in the sample rule definition form above.

## Command Buttons

The following buttons appear on the toolbar (command line) of every rule definition form. The first three buttons, **Add**, **Search**, and **Edit**, are modes. The fourth button, **Delete**, is a command that can be used to remove one or more table entries. The mode in which you are operating determines which of the other buttons are accessible. If a command is not applicable to a particular mode, the button is grayed out and inaccessible.

### Add

This button activates Add mode, in which you can add an entry to the table. Other buttons that are active in Add mode are **Search**, **Save**, and **Cancel**.

**Search**

This button activates Search mode, in which you can enter search criteria and display all the table entries that match your criteria (or enter no search criteria to view all values in the table). For example, if you enter 1112 in a year field for a table, the system will locate all the table entries for that year.

Other buttons that are active in Search mode are **Add**, **OK**, and **Cancel**. In addition, in this mode a field called Return Records appears with a pop-up list of numbers. You can use this option to specify the maximum number of records you want your search to return.

**Edit**

This button activates Edit mode, in which you can change the information in a table entry. To enter this mode, you must first perform a search to locate the record, and then select the desired record from the list at the bottom of the screen. You may either click once on the desired record or use arrow keys, <Tab>, or <Enter> to move the cursor to the field that you want to change. After selecting the desired record, click **Edit** or press <F4> to enter Edit mode. When you have changed all the fields that you want to update, select the Save button or press <F5>. If you do not want to save the changes you have made, click Cancel or press <F6>.

Other buttons that are active in Edit mode are **Save** and **Cancel**.

**Delete**

This button enables you to delete a table entry. To delete an entry, you must first perform a search to locate the record, and then click **Delete**. A dialog box appears, asking whether you are sure you want to permanently delete the selected item. Click **Yes** or press <Enter> to confirm your choice, or click **No** or press <Alt-n> to cancel the deletion.

**Save**

This button saves changes you have entered in Edit or Add mode. It is active only in these two modes.

**OK**

This button starts a search and is active only in Search mode. You may enter search criteria first, or you may click **OK** without entering search criteria to display all records.

**Cancel**

This button appears in Add, Search, and Edit modes. It allows you to exit these modes without saving any changes you may have made, and it returns you to View mode.

**Return Records**

The Return Records pop-up menu appears only in Search mode and is located to the right of the buttons described above. Beside this field name is a pop-up list of numbers from which you can choose the maximum number of records you want your search to return: 100, 1,000, 10,000, 100,000, or ALL.

## Parts of the Screen

Below the command buttons, the rule definition screen may be divided into either two or three different parts: Field Names, Master-Detail Relationships (which may not be present on some screens), and the Returned Records List. For ease of viewing, you can increase or decrease the height of these sections of the screen by clicking on the horizontal dividing lines between sections and dragging the dividing lines up or down.



The following describes the three possible parts of a rule definition screen:

### Field Names

This part of the screen contains the names of the fields in the table, along with either boxes or pull-down menus for data entry or editing. The field names match the column names in the Returned Records List (see below).

In Add and Edit modes, the names of fields that require data to be entered appear in blue. Failure to enter data in any of these blue-marked fields will result in an error message when you click **Save**.

### Linked Tables

This part of the screen, if present, appears between the Field Names and the Returned Records List. This section appears on screens where other tables are linked to the primary table (the table for which the screen is named). For example, a Department table containing a number of records might exist for a single Division record.

The Linked Tables section has vertical tabs along the left-hand side of the screen that bear the name(s) of the related table(s). You can switch from one relationship table to another by clicking the appropriate tab. As with the Returned Records List, you can change the order of columns by clicking on a column name and dragging it to the left or right.

There are two possible modes within the Linked Tables: Add and Edit. Buttons for these modes appear in a vertical list on the right-hand side of this section of the screen, along with three other buttons: Delete, Save, and Cancel.

To change a linked record, first locate it with a query, and then switch to the related record by clicking on the appropriate tab. When the correct record appears, you can edit or delete it.

### Returned Records List

This section of the screen is always the lowest and contains a list of records returned from a search. Column headings in this list match the Field Names section. For ease of viewing, you may change the order in which columns appear in the Returned Records List by clicking on the gray bar containing the field name and dragging it to the left or right. The names in the Field Names section do not change order.

## Using Rule Definition Forms for Table Maintenance

Table Maintenance is an important part of maintaining and updating your system. All CX technical manuals include specific instructions for maintaining your tables through the Table Maintenance options available in these main menus from the navigation tree:

- Recruiting/Admissions
- Student Management>Registrar
- Student Management>Financial Aid
- Student Management>Health Services
- Student Management>Student Placement
- Fiscal Management>Accounting
- Fiscal Management>Budgeting

- Fiscal Management>Student Accounts/Billing
- Institutional Advancement>Alumni Association
- Institutional Advancement>Development>CRM Constituent
- Institutional Advancement>Donor Accounting
- Institutional Advancement>Public Relations
- Institutional Advancement>Student Placement
- Human Resources>Utility
- System Management (provides access to all system tables)

In addition, some tables which are related to narrowly defined features or special purpose functions are accessible from within the menu options for those features or functions. Examples include a Call Entry Result table option on the Recruiting/Admissions>Call Entry menu, the Maintenance menu under Fiscal Management>Central Stores, and the Phonathon Codes menu under the Institutional Advancement>Phonathon menu.

These navigation tree options offer access to rule definition forms so your institution can customize your implementation of the system. You can also use rule definition for continued updates, changes in table information (e.g., tuition, policies, procedures, degrees, etc.), and annual or future changes that are inevitable. You will use rule definition forms and the commands from this section to maintain your tables.

---

## Using Program Screens

In addition to rule definition forms, CX contains a large number of entry and program screens. The program screens provide the following features:

- You can search alternate address files for names as well as the basic ID record.
- You can perform Soundex searches that locate records with alternate or similar spelling (e.g., if you search for John Smith, a Soundex search will locate a record for Jon Smyth or Joan Smythe).
- You can use the table lookup feature to view and select valid values for completing a field.

### Program Screen Example

Following is an example of a program screen. This example screen enables Admissions office personnel to enter information about a prospective student who has submitted an inquiry, and is called an entry screen. Entry screens typically are modified to resemble forms that your institution uses. They use the structure and have the same general appearance as all program screens in the system, (e.g., the top of the screen contain command and prompt information, and the lower left corner indicates the mode in which the screen currently operates). The commands and prompts change as the mode changes.

Fields on the example screen show various default values, or values that are listed first in the associated dropdown lists and have therefore defaulted into their respective fields.

## Program Screen Commands

Program screen commands vary with the purpose of the screen and the mode of operation in which you are using the screen. For example, the ID Entry screen in Update mode displays and accepts different commands than the ID Entry screen in Query mode. Program screens (e.g., the Financial Aid Entry screen from which you execute financial aid processes) display and accept commands that relate to the processes you can execute. For more information about common commands and modes of operation, see *ID Entry and Query Screens* in this guide. For more information about specific program screens, refer to the user reference for the related module.

## Common Program Screen Commands

The following lists and describes the commands that you can use on many program screens. Note that on the GUI-format screen, you can access the commands in any of the following ways:

- Pressing the corresponding keys on your keyboard
- Clicking on the icons
- Selecting **Command** from the menu bar and then selecting the desired command from the list that appears

### Cancel

- Allows you to do any of the following without saving the information you have entered:
  - Back out of the current command
  - Return to the previous command line
  - Return to the previous window

**Detail**

Displays a window that enables you to view, add, and update multiple-item information, such as student interests and involvements. This command appears after you query a record in an entry window.

**Exit**

Allows you to exit from the program.

**Find ID**

Displays a window which enables you to search for identification information on an individual or organization, using name, ID number, and Social Security number. This command appears when you access Query mode in an entry window.

**Finish**

Communicates to the system that you have completed your data entry or selection.

**Help**

Displays help about phonetic searches, and the screen, commands and keystrokes.

**ID type**

Displays a view-only window containing information about an individual or organization associated with your institution. The window contains a variety of logical Y(es)/N(o) fields; the values in the fields vary, depending on the types of records that exist in the system for the selected ID. Examples include:

- If the student has a Student Enrollment record, the field for Student contains a “Y”.
- If you use the Vendor Entry program to enter the ID record, the field for Business contains a “Y”.

**Insert**

Allows you to add a new record to the database.

**Next**

With **Previous**, allows you to move back and forth between consecutive windows, or between other options that have multiple windows.

**Previous**

With **Next**, allows you to move back and forth between consecutive windows, or between other options that have multiple windows.

**Update**

Allows you to change or modify the record that you queried from the database.

---

## Using Detail Windows

Detail records contain variable amounts of information related to a specific ID record. An ID record can have as many (or as few) associated detail records as necessary to maintain all available information. For example, a student with two siblings and a spouse might have three relationship records, while a student with four siblings, two parents, two children, and a church affiliation might have nine relationship records.

When the system displays detail records on your screen, they appear in detail windows.

Detail windows enable you to view or update a variety of types of information that relate to the ID. The relationship between ID records and the related scroll records that appear in the detail windows is master/subordinate, or independent/dependent, since detail records cannot exist without a relationship to an ID record.

**Note** You must be in Update mode before you open any detail windows to be able to change or add scroll record information. You can, however, view detail windows and their contents while in View mode.

## Example of Use

A variety of detail windows exist in the system. Examples of detail windows in the Recruiting and Admissions area are Education, Enrollment Status, Relationships, Exams, and Interests.

An additional example is the Involvements Detail window, used primarily in the Recruiting/Admissions and Institutional Advancement areas.

The Involvements Detail window contains information about all the known involvements or activities of the individual (e.g., President's Club or baseball). If the individual has two involvements, two Involvement records are linked to the individual's ID record, and two scroll records appear on the detail window. On the other hand, if the individual has twenty involvements, all twenty appear on the detail window. Because space constraints on the screen enable you to display three involvements at a time, you use the **Forward** and **Back** commands to display the other involvements as desired.

For examples and detailed explanations of some common detail windows including the Involvements detail window, see *Using Common Screens* in this guide.

## How to Access

You can access detail windows whenever the **Detail** command appears on the toolbar or Commands pull-down menu.

When you access a detail window, it opens in the lower portion of the screen. In the upper right area of the window a message such as "Record 1 of 14" indicates what record you are currently viewing, adding, or updating, and how many records exist.

## Detail Window Example

Following is an example of a detail window in which Admissions office personnel can enter involvement information about a prospective student. Note that now commands appear on the window itself; the commands applicable to the detail window appear on the frame or the Commands menu of the larger screen over which the detail window overlays.

The screenshot shows a window titled 'Involvements'. At the top right, it says 'Record 1 of 1'. Below this is a table with the following columns: Code, Description, Begin, End, and Title. The first row of data shows 'BADM' in the Code column, 'Badminton' in the Description column, '04/12/2008' in the Begin column, and 'Team captain' in the Title column. Below the table, there are two rows of input fields. The first row has an 'ID No:' label followed by a text box containing '0' and a dropdown arrow, and a 'Type:' label followed by a dropdown menu showing 'ATHLETIC'. The second row has similar input fields for 'ID No:' and 'Type:'.

## Detail Window Contents

The above detail window example illustrates features of detail windows. For example, in the upper right corner of the detail window, the screen displays the number of the record that you have currently selected (1), and the number of records that exist for the ID (1).

## Detail Windows Commands

The following commands are applicable to detail windows.

**Note** Some detail windows are view only; you can look at information but you cannot add to it or change it. For example, on the ID entry screen, you can view enrollment status information, but you cannot add or update it. When a detail window is view-only, some commands are not active or available for selection.

### Add-ID

Allows you to add an ID record for an individual to the system (the Add ID for Individual window appears to enable you to enter and save a record to the database).

### Back

Displays the previous screenful of detail records.

### Cancel

Discards the changes you entered in the detail window, and removes the detail window display so you can view the entry screen.

### (Detail Window) Scroll

Removes the detail window display, and displays the list of available detail windows.

### Erase

Deletes the scroll record in which your cursor is located.

### Finish

Saves the changes you entered in the detail window, and removes the detail window display so you can view the entry screen.

### Forward

Displays the next screenful of detail records.

### Insert

Opens a line above the point at which your cursor is located, so you can add an additional detail record.

**Sort**

Allows you to sort records in a detail window alphabetically or in some other specified order.

**Toggle**

Allows you to switch back and forth between Add and Insert mode.

## Using Pop-up Windows

Pop-up windows are small displays, usually with frame borders, that partially overlay a larger screen or window, or small displays that appear with other windows on a screen. Some pop-up windows require or enable you to enter information, while others are view only.

An example of a pop-up window in which you enter information is the Output Parameters and Scheduling window that appears when you execute programs or produce reports. Alternatively, an example of a pop-up window that displays information is the ID Type/Associated Records window.

### Pop-Up Window Examples

The following is an example of the Output Parameters and Scheduling window that appears when you initiate some processes or produce system reports.

The screenshot shows a window titled 'Jenzabar CX Menu'. It contains two main sections: 'OUTPUT PARAMETERS' and 'SCHEDULING'. In the 'OUTPUT PARAMETERS' section, there is a 'Mode:' label followed by a dropdown menu showing 'hpserv', and a 'File:' label followed by an empty text box. In the 'SCHEDULING' section, there is a 'Time:' label followed by a text box showing '1100P', a 'Day:' label followed by an empty text box, and a 'Background:' label followed by a radio button labeled 'N'.

Following is an example of the ID Type/Associated Records window that appears when you are performing an ID query and want to review the types of records that exist for the student.

The screenshot shows a window titled 'ID Type/Associated Records'. It displays a grid of checkboxes for various record types. The grid is organized into three columns. The first column contains: Alumni (N), Business (N), Constituent (N), Donor (N), Instructor (N), Foundation (N), Organization (N), Parent (N), and Payroll (N). The second column contains: Admit (Y), Undergraduate (Y), Graduate (N), Institution (N), High School (N), College (N), Community (N), and College (N). The third column contains: Student (Y), Currently Enrolled (Y), Undergraduate (Y), Graduate (N), Student Services (Y), Residence Hall (N), Mealplan (N), Financial Aid (Y), and Currently on Aid (Y). At the bottom of the window, there is a 'Close' button and a small icon.

## Pop-Up Window Commands

The commands you can use when your screen displays a pop-up window vary according to the purpose of the window. For example, when the pop-up window is view-only, it may only contain the **Cancel** or **Close** command.

When the pop-up window requires you to enter information, it will usually contain the following commands:

**Back**

Scrolls back through additional pop-up windows of information.

**Cancel**

Discards the information you entered in the pop-up window, and aborts the process. For view-only pop-up windows, this command causes the pop-up window display to disappear from your screen.

**Finish**

Saves the information you entered in the pop-up window, and executes the process.

**Forward**

Scrolls forward through additional pop-up windows of information.

**Help**

Displays information about the process.

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## Using JICS Pages

JICS (Jenzabar Internet Campus Solution) is a product with multiple CRM (Customer Relationship Management) tools to enable clients and their alumni, students, faculty, and other interested parties to access specific types of data from any PC with Internet access. For example, a high school senior interested in applying to your institution can interface with the CX Recruiting and Admissions module by submitting an application via CRM Candidate. Similarly, an enrolled student can register for classes, perform financial aid calculations, or view various types of demographic information about himself or herself using any PC.

## Web Page Example

The following is an example of the Course Search portlet in CRM Student. Note that the JICS portlets are typically customized to meet every institution's unique requirements.



## Example of Use

JICS pages are used for all functional areas where the end user is not necessarily in a campus office. As an example of using the above JICS page, a student can conduct a search for courses at any time, and from any place using a computer with Internet access.

## Using the FPS Screen

The FPS (Forms Production System) screen is a standard screen used with various applications throughout the system. It enables you to print form output. The screen contains several fields in which you enter specific parameter information such as the type of form or the printer you want to use.

## Applications that Use the FPS Screen

You can access the FPS screen from several applications. The screen title may change depending on the application you are using. Below is a list of examples of applications that use the FPS screen followed by the screen title in that particular application.

- Third Party Billing – Print Invoices screen
- Payroll/Personnel – Print W2 Forms screen
- Check Writing – Print Checks & Grp Sheets screen
- Financial Aid – Print Award Notices screen

**Note** The acronym FPS will appear on the far right side of the toolbar line in each screen.

## Screen Example

The following is an example of the FPS screen.

The screenshot shows a window titled "Print W-2 Forms" with a menu bar (File, Edit, Commands, Help) and a toolbar. The main area contains the following fields:

- Type of Form:** A text box containing "w2" and a numeric field containing "0".
- Name of Printer:** A dropdown menu showing "hpadmin".
- Station Number:** A text box containing "0".
- Current Form Type:** A label with no input field.
- First Used for Setup:** A label with no input field.
- First to Be Printed:** Two adjacent empty text boxes.
- Last Form Printed:** Two adjacent empty text boxes.
- Date Forms Created:** A label with no input field.

At the bottom, a status bar displays "Parameters" and the instruction "Enter type of form to be printed. Use [F6] for table lookup."

## Screen Fields

The following fields exist on the FPS screen.

### Current Form Type

Display only. The type of form that is currently loaded in the printer (e.g., invoice).

### Date Forms Created

Display only. The date (mm/dd/yyyy) and time the forms were produced.

**Example:** 09/15/2011 3:24 pm

### First To Be Printed

Display only. The document number of the first invoice to be printed for the specified station.

### First Used for Setup

Display only. The next number associated with the form type. The system assumes this form number will be used for forms alignment.

### Last Form Printed

The number of the last form printed. This field continuously updates, however, you may manually enter a value in this field by choosing **Restart** from the Commands menu.

### Name of Printer

The name of the printer that prints the forms. Use Table Lookup (F6) for a list of valid codes.

**Station Number**

The station number where the forms are produced. The default value is zero (0), which tells the system that the station number is irrelevant. Unless told otherwise, use the default.

**Type of Form**

The type of form that is printed. If blank, the system assumes you are using regular printer paper. Use Table Lookup (F6) for a list of valid codes.

**Example:** Invoice

## Screen Commands

The following commands appear on the FPS screen command.

**Again**

Enables you to print a second copy of previously printed forms, using the original form or check numbers.

**Draft**

Enable you to print voided forms in Draft or Test mode on blank paper.

**Note** This command does not require or print document numbers.

**Exit**

Enables you to exit to the System menu.

**Formtype**

Lets you enter the form type, printer name, and station number that you want to use.

**Help**

Enables you to view program command and control key descriptions.

**Restart**

Lets you enter the number of the last form type so you can continue printing an interrupted print run.

**Start**

- Lets you enter the number for the first form you want to print.
- Loads all the files for the specified form type.

## Printing Forms with the FPS Screen

Use the following procedure to print forms from the FPS screen.

**Note** You may also reprint gift receipts using the **Again** command. For background information and the procedure for reprinting gift receipts, see the section *Reprinting Gift Receipts* in the *Alumni/Development User Guide*.

1. Access the FPS screen.
2. Select **Formtype**. The cursor moves to the Type of Form field.
3. Enter type of form to be printed (e.g., classlist, final, or midsest) then press <Tab>. The cursor moves to the Name of Printer field.
4. Enter the name of the printer (e.g., lpt) you want to use to print the forms, and then press <Tab>. The cursor moves to the Station Number field.
5. Enter the station number or accept the default, 0.

6. Select **Finish**. The system displays the following prompt in a window: "Please load the 'formtype' forms into 'printer name'."

**Note** You may also select **Draft** if you wish to print voided forms in Draft mode.

7. Load the correct form in the printer and select **Loaded**. The formtype appears in the Current Form Type field.
8. To start a new print run, go to step 12; to restart an interrupted print run, go to step 9.
9. Select **Restart**. The cursor moves to the Last Form Printed field.
10. Enter the number of the last form printed in the interrupted print run and press <Tab>. The cursor moves to the second Last Form Printed field.
11. Enter the ID number of the student whose form was last printed and press **Enter**. Go to step 13.
12. Select **Start**. The date and time the forms were created appears in the Date Forms Created field of the FPS screen, the first form to be printed appears in the First to be Printed field of the FPS screen, and the system displays the following prompt in a window: "Are forms correctly aligned?"
13. Are the forms correctly aligned?
  - If yes, select **Yes**.
  - If no, select **No**, then align the forms correctly.
  - If you want to skip, select **Skip**.
14. The system displays the following prompt in a window: "Begin printing or Skip this form."
15. Do you want to begin printing the forms?
  - If yes, select **Print**. The form prints, and the message "Now printing..." appears in the message bar.
  - If no, select **Skip**.
16. Select **Exit**. The system displays the prompt, "Are you sure you want to exit?"
  - If yes, select **Yes**. The menu appears.
  - If no, select **No**. The previous screen appears.



## Using Common Screens

This purpose of this section is to show screens that appear throughout the system across modules and applications. These screens are not specific to one part of the product; therefore, you may encounter them in two or more applications or modules. This section provides a quick reference of the commands and options you use to perform procedures related to the screen, regardless of where it is used.

Refer to this section when you have questions about a specific field, command, or when you are completing procedures.

The screens and windows in this section represent those contained in the Jenzabar standard product in GUI format. If your institution changes these screens and windows to meet its specific needs, your screens and windows will look different from those shown in this section. Your screens will also look different if you use Jenzabar CX in any version prior to 8.1.

The screens, field names and commands appear in alphabetical order in this section, unless otherwise noted.

The commands on the CX screens change, depending on procedures you perform, commands you have previously selected, or the mode in which the screen is being used.

## Accomplishments Detail Window

The Accomplishments detail window enables you to enter awards and/or titles. Depending on the policy of your institution, it can reflect awards and/or titles received at the student's current institution and/or at previously attended institutions.

Each Accomplishment record on this detail window contains information for one accomplishment. Therefore, if you enter three accomplishments for a student, that student will have three separate Accomplishment records.

### Example

Following is an example of the Accomplishments Detail window.

Code	Description / Text	Type	Date	Record Sess Year	2	of 2	Prog Of
HONR	National Honor Society	ACADEMIC	05/15/2007		0		Y
LETT	Varsity letter award	ATHLETIC	02/25/2008		0		Y
	Capt of football team						

## Fields

The following list describes the fields that appear on the Accomplishments Detail window.

**Code**

A code that indicates the award and/or title (e.g., DEAN for Dean's List or HONR for National Honor Society).

**Date**

The date (mm/dd/yyyy) that indicates when the student received an award and/or title.

**Description / Text**

A description of the code in the Code field (e.g., Dean's List 3.6 GPA for session). The first line of text appears automatically and describes the code; the second line contains text that you type to provide additional information about the code.

**Prog**

A code that indicates the program under which the student received an award and/or title (e.g., UNDG for undergraduate program).

**Sess**

A code that identifies the session during which the student received the award and/or title (e.g., FA for Fall).

**Type**

A code that identifies the type of award and/or title (e.g., ACADEMIC or ATHLETIC) received.

**Year**

The year in which the student received the award or title.

## Commands

The following list describes the commands you can execute from the Accomplishments Detail window:

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Lets you to move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Lets you move forward through a list of records.

**Scroll**

Updates the detail window information.

## Church Form Screen

The Church Form screen allows you to view, add, and update constituent information for a church.

### Example

Following is an example of the Church Form screen.

The screenshot shows a window titled "Constituent Profile - Church Form". It contains a menu bar (File, Edit, Commands, Help) and a toolbar with icons for search, print, and exit. The main area displays the following fields:

ID No:	5107810	Fed. ID No:		Add Date:	02/09/2009
Name:	Main Street Church of God			Last Update:	02/09/2009
Address:	5123 Main Street				
City:	Johannesburg				
State/Zip:	HI	49751	Country:	USA	
Telephone:	419-555-4781				
Denom:	CG	Church of God		Last Update:	
Budget:	\$100000.00			Membership:	50
Review:	NOV		Effective Date:		

At the bottom, there is a tab labeled "CONSTITUENT PROFILE".

### Fields

The following fields appear on the Church Form screen.

#### Add Date

The date the system added the ID record to the database. A display-only field, the system enters this information.

#### Address

The church's permanent address appearing in the church's ID record. You can enter up to two lines of address information.

#### Budget

The church's annual budget (e.g., \$120000.00).

#### (Budget Due Date)

An unlabeled field located to the right of the Review field. The date (mm/dd/yyyy) the church's annual budget is due.

#### City

The city of the church's permanent address appearing in the church's ID record.

**Country**

The country of the church's permanent address appearing in the church's ID record (e.g., USA for the United States). Use **Table Lookup** for a list of valid countries.

**Denom**

A code identifying the church's denomination (e.g., BPST). Use **Table Lookup** for a list of valid codes. The system enters the description of the code to the right.

**Effective Date**

The date (mm/dd/yyyy) the number of church members was effective.

**Fed. ID No**

The church's federal ID or Social Security number appearing in the church's ID record (e.g., 225-55-8888).

**ID No**

The system-generated number identifying the church in the database.

**Last Update (upper field)**

The date the ID record was last updated by the system or a user. A display-only field, the system enters this information.

**Last Update (lower field)**

The date the Church record was last updated by the system or a user. A display-only field, the system enters this information.

**Membership**

The number of church members.

**Name**

The church's name.

**Review**

The month the church's budget is reviewed.

**State/ZIP**

Two related fields; the first field is the two-letter state abbreviation and the second field is the ZIP code of the church's permanent address appearing in the church's ID record. Use Table Lookup for a list of valid states and ZIP codes.

**Telephone**

Two related fields; the first field is the church's permanent telephone number appearing in the church's ID record (e.g., 505-872-9283). The second field is the church's extension number, if necessary.

**Commands**

The following is a list of the commands you can execute from the Church Form screen.

**Note** You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select Commands from the menu bar.

**Auto-Mode**

By-passes the Display mode and automatically puts the screen into Query mode, then Update or Insert mode.

**Cancel**

In Insert, Query, and Update modes, does one or all of the following without saving any of the field entries you have made:



- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Close**

Enables you to close the ID Types/Associated Records window.

**Detail**

In Display, Insert, and Update modes, displays the detail windows enabling you to select multiple-item information, or records, associated with the ID number.

**Display ID**

In Query mode, enters information into the fields for the ID being queried. Enables you to select it or query on another.

**Exit**

Enables you to quit the program and return to the menu.

**Find ID**

In Query mode, accesses the ID Query screen. Enables you to enter additional search criteria (e.g., name, Social Security number, etc.) and narrow the search for an ID record.

**Finish**

In Insert and Update modes, saves your field entries when you have completed your data entry or selection and want to continue.

**Finished**

Enables you to close the ID Types/Associated Records window.

**ID-Type**

In Display, Insert, Query, and Update modes, displays the view-only ID Type/Associated Records window containing information about the church. The window contains a variety of logical Y(es)/N(o) fields; the codes in the fields vary, depending on the types of records that exist for the church. For example:

- If the church has a Donor record, the Donor field contains Y
- If the church has a Constituent record, the Constituent field contains Y

**Insert**

Puts the screen into Insert mode; enables you to add a new record.

**Note**

This command appears after you select **Query**, then **Find ID**. At the ID Query screen, select **Cancel** to return to the Church Form screen.

**Menu**

Returns you to the initial Forms menu, from which you can select another form.

**Query**

Puts the screen into Query mode; enables you to query on an ID or Social Security number.

**Select**

In Query mode, enables you to select the ID or Social Security number entered and searches for the associated ID record.

**Update**

In Query mode, puts the screen into Update mode; enables you to update the record(s).

## Contacts Detail Window

The Contacts detail window enables you to enter and track incoming and outgoing correspondence, or contacts, between your institution and a student being recruited.

The following are examples of the types of contacts you can add and update:

- A phone call a student makes inquiring about your institution
- A letter your institution sends a student confirming a campus visit
- An application a student sends your institution
- An acceptance letter your institution sends to a student
- A deposit for tuition a student sends your institution

Each Contact record contains information about one contact. For example, if you enter three contacts for a student, that student has three separate Contact records. The Contacts detail window can display up to six records at a time.

### Example

Following is an example of the Contacts detail window.

The screenshot shows a window titled "Contact" with a table of contact records. The table has columns: Contact, St Contacted, Due, Corresp, Record Added, and a status column. The first record is highlighted.

Contact	St Contacted	Due	Corresp	Record Added	1 of 1
REMINDER Reminder Lett	E	09/09/2009	0	02/09 0	Y

### Fields

The following fields appear on the Contacts detail window.

#### Added

Displays the date your institution added a contact record to the database. You cannot change this field. This date defaults to today's date when you are entering data on this screen.

#### CGC

Either Y(es)/N(o) specifying whether the contact is a computer-generated contact (CGC) rather than a contact created by an individual. A blank indicates No.

#### Contact

A code and corresponding text indicating either of the following:

- The type of incoming correspondence your institution expects to receive or has already received from a student

- The type of outgoing correspondence your institution sends to a student

**Example:** ACCLET Acceptance letter received; INQRECV Inquiry received

**Note** If you select Table Lookup to locate a valid code for this field, notice the letters “I” (incoming) or “O” (outgoing) appear on the far right of the Table Lookup screen to indicate the type of correspondence. After you enter a valid code in the Contact field, the system automatically inserts an “I” or “O” in the Rt field.

#### Contacted

The date on which your institution received incoming correspondence or sent outgoing correspondence to a student. Use the format mm/dd/yyyy. Enter a date in this field if the code in the St field is “C”. Otherwise, do not complete this field.

#### Corresp

The identification number of the institution or individual at the institution (e.g., guidance counselor) with whom your institution corresponds (e.g., 20000).

#### Due

The date on which your institution either expects to receive correspondence from a student, or on which your institution expects to send correspondence to a student.

Enter a date in this field if the code in the St field is “E”. Otherwise, do not complete this field.

#### Rt

Displays “I” (incoming) or “O” (outgoing) indicating the routing, or direction, of the correspondence. You cannot change this field.

#### St

A code indicating the status of incoming or outgoing correspondence.

Examples:

- E(xpected) if your institution expects some type of correspondence from a student, such as a high school transcript or a test score.
- C(ompleted) if your institution receives the expected correspondence from a student.
- V(oided) if, for example, a student tells your institution that he or she will attend another institution. Because the student will not send any of the expected correspondence to your institution, change all the “E” codes to “V” in this field.

**Note** Once your institution receives all of the appropriate correspondence from a student (i.e., a “C” is in the St field of each contact record for that student), an admissions committee at your institution determines the student’s admission eligibility.

#### Time

A time indicating when an Admission representative from your institution will correspond with a student or another institution, such as a high school visit. Use military time, e.g., 1430 for 2:30 p.m..

## Commands

The following list describes the commands you can execute from the Contacts detail window:

### Add

Places the screen in Add mode so you can make entries to add a record.

### Back

Lets you to move back through a list of records.

### Cancel

Lets you exit from the screen without saving any field entries.

### Del-line

Lets you delete a record.

### Finish

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

### Forward

Lets you to move forward through a list of records.

### Scroll

Updates the detail window information.

## Education Detail Window

The Education detail window enables you to enter academic information that links a student with one or more schools the student attended or currently attends, such as a high school, community college, or four-year college. Each education record contains the name and location of a school and the student's academic information.

## Example

Following is an example of the Education detail window.

The screenshot shows the 'Education' detail window. The title bar says 'Education'. The form is divided into two main sections. The top section contains the following fields:

- ID Number:** 11 (dropdown)
- Enroll Date:** 09/01/1985
- Program:** UMDG (dropdown)
- Degree:** BA (dropdown)
- Major:** AMS (dropdown)
- GPA:** 3.7
- Rank/Size:** 0 / 0
- Credits:** 0.00
- University of Tennessee** (text)
- Knoxville** (text)
- TN** (text)
- COL** (text)
- PU** (text)
- Grad Date:** 06/05/1999
- Sess/Year:** 0 (dropdown)
- Trans Type/Date:** N (dropdown)
- Record 1 of 1** (text)
- CEEB No:** 102990
- FA:** N (dropdown)

The bottom section contains the same fields as the top section, but they are currently empty or have default values.

## Fields

The following fields appear on the Education detail window.

**CEEB No**

A number that the College Entrance Examination Board has assigned to a school that a student has attended or currently attends (e.g., 181600 for Sacred Heart Academy).

**Deg**

A code indicating the type of degree a student earned or plans to earn from an institution.

**Example:** BS for Bachelor of Science

**GPA**

A student's grade point average at a school the student attended or currently attends (e.g., 3.4).

**Grad Date**

The date (mm/dd/yyyy) on which a student graduated or will graduate from a school the student attended or currently attends.

**ID No**

The identification number for a school that a student attended or currently attends.

**Example:** 57952 181600 Sacred Heart Academy

**Maj1**

A code indicating the student's major at a school the student attended or currently attends.

**Prog**

A code specifying the program of a school the student attended or currently attends. Leave this field blank if the institution is a high school.

**Example:** UNDG for undergraduate program

**Rank/Size**

Numbers indicating a student's academic class rank and the size of the class at the school the student attended or currently attends.

**Example:** 51217 to indicate that a student is ranked fifth in a class of 1,217 students

**Session**

A code specifying the session in which a student graduated or will graduate from an institution.

**Example:** FA for Fall

**Year**

The year in which a student graduated or will graduate from an institution.

**Commands**

The following list describes the commands you can execute from the Education Detail window.

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Lets you to move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Lets you to move forward through a list of records.

**Scroll**

Updates the detail window information.

## Employment/Work Detail Window

The Employment/Work detail window enables you to enter information on any jobs that an individual has held or currently holds. Each record on this screen contains information about one job.

### Example

Following is an example of a completed Employment/Work detail window.

The screenshot shows a software window titled "Employment/Work". Inside, there is a form with several fields. At the top right, it says "Record 1 of 1". The form has columns for "Bus ID", "Business Name", "Begin", "End", "Telephone", and "Ext". The "Bus ID" field contains "0". The "Business Name" field contains "Henderson and Marshall, LTD.". The "Begin" field contains "04/16/2007". The "End" field is empty. The "Telephone" field contains "513-555-7816". The "Ext" field is empty. Below these fields, there are several empty rows and columns, suggesting a list of records. There are also some small icons and buttons at the bottom of the form.

### Fields

The following fields appear on the Employment/Work Detail window.

**Begin**

The date (mm/dd/yyyy) of an individual's first day of employment at a business.

**Bus Id**

The identification number of a business (e.g., 20187).

**Note**

If you perform a query to search for the name of a business and find that the business does not exist in the database, type the name of the business in the Business Name field.

**Business Name**

The name of a business.

If information on a business already exists in the database, the system automatically displays the name of the business in the Business Name field when you enter a valid code in the Bus ID field. However, if the information does not already exist, type the name of the business in the Business Name field.

**End**

The date (mm/dd/yyyy) of an individual's last day of employment at a business.

**Ext**

The telephone extension number of the business.

**Telephone**

The telephone number of the business.

## Commands

The following commands are available on the Employment/Work detail window.

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Lets you to move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Lets you to move forward through a list of records.

**Scroll**

Updates the detail window information.

---

## First Relationship Detail Window

The First Relationship detail window enables you to enter relationships that exist between individuals and organizations connected with your institution in some way. The First Relationship detail window contains relationships between any of the following:

- Two individuals
- Two organizations
- An individual and an organization

For example, you can enter a relationship between a parent and a child (who is also a student), or between your institution and a student worker. A relationship important to an Admission office is one between a prospective student and the student's parents, since many institutions send letters to the parents of the students they are recruiting.

The major component of this screen is the relationship ID code that represents the type of relationship for which you are entering information. This code helps you to determine whether you enter information in the First Relationship screen or the Second Relationship screen. The following are examples of relationship ID codes:

- CE for Company/Employee
- MD for Mother/Daughter

Each record on this screen contains information about only one relationship. For example, if you enter two relationships, two separate relationship records will exist.

## Which Relationship Screen Should You Use?

Enter information in the First Relationship screen when the left side of the relationship ID code (e.g., the husband in the code “HW” for husband/wife) represents the individual or organization whose record you are currently adding or updating on the entry screen.

## Example

Following is an example of a First Relationship detail window.

The screenshot shows a window titled "First Relationship" with a sub-header "Record 1 of 2". Below this, a message states: "The person selected above is on the LEFT side of the relationship code." The main area contains a table with the following columns: Rel ID, Name, Code, Begin, End, and Prt Mnt. The first two rows are populated with data, and the remaining four rows are empty.

Rel ID	Name	Code	Begin	End	Prt Mnt
5105895	Harper, Daryl	BB Brother/Brother	12/28/1963		Y Y
1258659	St Patricks Church	CHUR Church	11/14/1980		Y Y

## Fields

The following fields appear on the First Relationship detail window.

### Begin

The date on which a relationship began or became known.

**Example:** 09/10/1989 for a student's date of birth, or 09/10/2008 for a student's date of hire.

### Code

A code indicating the type of relationship between two individuals, two organizations, or an individual and an organization.

**Example:** CE for Company/Employee, FD for Father/Daughter

Keep in mind that the individual or organization whose record you are currently adding or updating is on the left side of the relationship ID code (e.g., the aunt in the code “AUI” for aunt/niece).



**End**

A date (mm/dd/yyyy) indicating the last day of a relationship. Leave this field blank if it does not apply to a relationship.

**Mnt**

Either Y(es) or N(o) specifying whether a change in the individual or organization's records on the left side of a relationship should be carried to all existing relationship records.

**Name**

The name of an individual or organization on the left side of a relationship. The system displays the name automatically when you enter a valid ID number in the Rel ID field.

**Example:** Doe, Judy for the aunt in the aunt/niece relationship

**Print**

Either Y(es) or N(o) specifying whether the name of the individual or organization on the left side of a relationship should be placed first on correspondence.

**Rel Id**

The identification number for the individual or organization on the right side of a relationship.

**Example:** 12345 for Jane Doe in the aunt/niece relationship.

## Commands

The following commands are available on the First Relationship detail window.

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Lets you to move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Lets you to move forward through a list of records.

**Scroll**

Updates the detail window information.

---

## Holds Detail Windows

The Holds windows enable you to view, add, or update registration holds, or unmet obligations, which can prevent a student from registering for courses.

## Access

Two Holds windows exist in Registration. Both windows contain information about holds that are currently active for a student. The two Holds windows are distinguished by the following characteristics:

- One Holds window is a view only window that the system displays automatically if holds exist for a student when you first attempt to register the student.
- The other Holds window appears when you select Holds from the command line. This window allows you to add or delete holds for a student.

The system displays holds that pertain to every office at your institution (Business office, Registration office, etc.) if they have an impact on Registration; however, you may have the authority only to add or update Registration office holds.

## Holds Window (View Only)

The Holds window appears automatically if holds exist for a student after you select the student to register.

## Fields on Holds Window (View Only)

The following fields appear on the Holds window.

### Abs.

Display only – A default field that specifies whether a hold on a student's record is absolute.

### Note

“Y” means a hold is absolute. You can neither override absolute holds nor register a student who has an absolute hold.

“N” means a hold is not absolute; it is a notation hold. Depending on the policy of your institution, you may override a notation hold and begin registering the student.

### Added by

Display only – A code that specifies which office in your institution added the Hold record (e.g., BOFF for Billing office).

### Comment

Display only – Text that offers additional explanation of the nature of the hold.

**Example:** Owes < \$100 for Spring

### Note

Although this is an optional entry field, comments document the reason for the hold.

### Description

Display only – A default field containing text corresponding to the value in the Code field.

**Example:** Student Accounts Hold

### Hold Action

Display only – A default field indicating what action a hold is preventing a student from performing (e.g., REGIST or registration).

**ID**

Display only – The student’s identification number and name.

**Example:** 1266910 Babbette, Gregory

## Commands on Holds Window (View Only)

The following commands are available on the view-only Holds window:

**Back**

Moves the cursor to the previous page of information on the screen.

**Cancel**

Exits from the current screen.

**Finish**

Exits from the current screen.

**Forward**

Moves the cursor to the next page of information on the screen.

## Example of Holds Window

Following is an example of the Holds window that appears when you select Holds, enabling you to add and update holds information for a student.

Code	Description / Office	Add Date	Begin	End	Comment
BUSO	Business Office	02/10/2009	02/10/2009		contact Bursar first
	REG Registrar's Office				

## Fields on Holds Window

The following appear on the Holds window.

**Add Date**

Display only – A default field containing the date (mm/dd/yyyy) on which a Hold record is (was) added. The default value is today’s date.

**Added By**

A code that specifies which office in your institution added the Hold record (e.g., REGR for Registration office). Permissions must be granted to each “Added By” code to update or remove the hold.

**Begin Date**

Required – The date (mm/dd/yyyy) on which the hold takes effect. The default is the system date.

**Code**

Required – The specific type of hold placed on the student’s record.

**Example:** FEES for Registration Fees Unpaid

**Comment**

Optional – Text that offers additional explanation of the nature of the hold.

**Note** Although this is an optional entry field, comments document the reason for the hold.

**Description**

A default field containing text corresponding to the value in the Code field.

**Example:** Registration Fees Unpaid

**End Date**

Optional – The date (mm/dd/yyyy) on which a hold is no longer effective for a student. Although this is an optional entry field, be familiar with your institution's policy on when to complete this field.

## Commands on Holds Window

The following is a list of the commands that you can execute from the Holds window:

**Back**

Moves the cursor to the previous page of information on the screen.

**Cancel**

Does either or both of the following:

- Cancels your field entries
- Exits from the current screen

**Finish**

Saves your field entries. Use this command when you have completed your entries and want to continue.

**Forward**

Moves the cursor to the next page of information on the screen.

---

## Interests Detail Window

The purpose of the Interests detail window is to enable you to enter one or more student interests. Student interests include academics, sports and hobbies. Each interest record contains information on one interest.

### Example

Following is an example of a completed Interests detail window.

The screenshot shows a window titled "Interests" with a table containing three columns: Code, Description, and Comment. The table has three rows of data and three empty rows below. The first row shows "ESSC" for Earth/Space Sciences with the comment "enjoys astronomy". The second row shows "FOOD" for Food Service Management with the comment "has taken cooking classe". The third row shows "MTEC" for Medical Technology with the comment "wants career in medicine".

Code	Description	Comment
ESSC	Earth/Space Sciences	enjoys astronomy
FOOD	Food Service Management	has taken cooking classe
MTEC	Medical Technology	wants career in medicine

## Fields

The following fields appear on the Interests detail window.

### Code

A code indicating the student's interest.

### Comment

Text you type to provide additional information about a student's interest.

### Description

Text corresponding to the Code field and describing the code.

## Commands

The following commands are available for the Interests detail window.

### Add

Places the screen in Add mode so you can make entries to add a record.

### Back

Lets you to move back through a list of records.

### Cancel

Lets you exit from the screen without saving any field entries.

### Del-line

Lets you delete a record.

### Finish

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

### Forward

Lets you to move forward through a list of records.

### Scroll

Updates the detail window information.

## Interviews/Recommendation Detail Window

The Interview/Recommendation detail window allows you to enter recommendation and interview information for an applicant. You can enter the

name of the person sending in a recommendation for an applicant, and how highly the applicant was recommended. You may also enter the date and time of an interview and with whom the applicant will be interviewing.

## Example

Below is an example of the Interview/Recommendation detail window.

Code	Intrvwr ID	Name	St Time	Due Date	Record	1 of 1	Scr
INT1	S107811	Harper, Michael John	E	02/10/2009			95
		Daniel Lane					

## Fields

The following fields appear on the Interview/Recommendation detail window.

### Code

A numbered code indicating whether this is an interview or a recommendation (e.g., the code for the first recommendation received would be Rec 1).

### Due Date

The date of the interview, or the due date of the recommendation.

### Intrvwr ID

The ID number of the person who will be interviewing the applicant. Used only if you are entering an interview.

### Name

The name of the interviewer, or the name of the person who sent the recommendation.

### Record...of...

The number of the record in relation to the total number of records.

### Recv Date

The date the recommendation was received.

### Scr

The student's score or rating from the interview or recommendation. This field is optional.

### St

The status of the recommendation or interview. Valid values are:

- E(xpected)
- C(ompleted)

**Time**

The time that the interview is scheduled.

## Commands

The following commands are available on the Interview/Recommendations detail window.

**Back**

Enables you to move back one screen of data, if additional screens exist.

**Cancel**

Does on or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Del-line**

Deletes a line of information from the screen.

**Finish**

Saves your field entry and returns you to the Admissions Entry screen.

**Forward**

Enables you to move forward one screen of data, if additional screens exist.

**Insert**

Inserts a new blank line in to which you can enter information, or moves your cursor to the next available line.

**Scroll**

Exits the Interviews/Recommendations window and displays the Detail window scroll screen.

---

## Involvements Detail Window

The Involvements detail window enables you to enter a student's extracurricular activities. You can enter types of activities such as sports, band, clubs, or a political or social organization. Depending on the policy of your institution, you can enter extracurricular activities for a student's previous institution and/or the institution the student currently attends.

Typically, involvements are activities in which students or applicants have participated or demonstrated an affinity, where interests may be some more passive or hobby-like endeavor. For example, reading may be an interest, but writing short stories is more appropriately considered an involvement.

Each involvement record contains information on one extra-curricular activity. Therefore, if you enter three activities for a student, that student has three separate involvement records.

## Example

Following is an example of a completed Involvements detail window.

Code	Description	Begin	End	Title	ID No:	Type:
SWIW	Swim Team - Women's	01/01/2006		Butterfly	0	ATHLETIC
	Blue Dolphins					
LVST	Livestock Judging	06/12/1998	06/15/1998	Black angus judge	0	SERVICE
	4-H cattle show					

## Fields

The following fields appear on the Involvements detail window.

### Begin

The date (mm/dd/yyyy) indicating the first day of a student's involvement in an extracurricular activity.

### Code

A code indicating a student's extracurricular activity.

**Example:** PRES for Presidents Club, TENW for women's tennis team

### Description

Displays text corresponding to the Code field and describes the code.

**Example:** Tennis Team – Womens

### End

The date (mm/dd/yyyy) indicating the last day of a student's involvement in an extracurricular activity.

### ID No

An organization's identification number.

**Note** If an ID number does not exist for an organization, press <CR> and enter the name of the organization.

### Title

A code indicating the title a student holds within an organization.

**Example:** Captain

### Type

A code indicating the type of extracurricular activity.

**Example:** ACADEMIC, ATHLETIC, BUSINESS, SERVICE, SOCIAL

## Commands

The following commands are available from the Involvements detail window.

### Add

Places the screen in Add mode so you can make entries to add a record.



**Back**

Lets you to move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Lets you to move forward through a list of records.

**Scroll**

Updates the detail window information.

---

## Operator Form Request Screen

The Operator Form Request screen enables the operator to view a current student's form request history, produce a form for a student, and view, update, or add holds for a current student. This form request process allows forms or reports to be generated without a Contact record. The forms are defined within the form entry table. This form request process also provides a means for deferred batch processing.

**Note** The system uses the Program Enrollment record, session, and year you specify to store the number of official and unofficial transcripts that have been printed if this feature has been turned on.

### Access

Access the Operator Form Request screen by selecting the following, beginning at the STU menu:

1. Registration
2. Operator Form Request

**Note** Other access paths can exist.

### Example

Following is an example of the Operator Form Request screen.

The screenshot shows a window titled "Operator Form Request - Operator Form Request". The window has a menu bar with "File", "Edit", "Commands", and "Help". Below the menu bar is a toolbar with icons for search, print, save, and exit. The main area of the window contains the following fields:

ID :	<input type="text" value="5106421"/>	Name:	Lane, Louise Carole
		Address:	1507 Ash St
			Apt. 12
		City:	Tallahassee
		State/Zip:	TN 37802
Form name:	<input type="text" value="DEGAUDAL"/>	Alternate recipient?	<input type="text" value="N"/>

At the bottom of the window, there is a status bar with the text "FORM ENTRY" and a small icon.

## Fields

The following fields appear on the Operator Form Request screen.

### Address

The student's street address.

### Alternate recipient?

Either Y(es)/N(o) indicating whether this form should go to an alternate recipient.

### City

The city in the student's address.

### Form name

The code for the type of form you want to produce.

### ID

The identification number of the student.

### Name

The name of the student.

### State/ZIP

The state and ZIP code in the student's address.

## Commands

The following commands are available from the Operator Form Request screen.

**Note** You can use a specific command only when it appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select Commands from the menu bar. Also, you must have the necessary database permission to use that command.

**Cancel**

Exits the screen without saving any field entries.

**Done**

Saves the field entry or entries so the request can continue.

**Exit**

Exits the current screen.

**Finish**

Displays an ID field so you may select the identification number of the recipient.

**Form Order**

Accesses the Form name field so the type of form can be specified.

**History**

Displays the student's form request history.

**Holds**

Displays the Holds window from which hold information can be added, viewed, or updated.

**List**

Displays a list of form types from which to select the desired form.

**Lookup ID**

Displays the ID Query screen from which ID information can be located.

**Query**

Accesses the ID field to allow the query of another student.

---

## Other Name Detail Window

The Other Name detail window enables you to enter alternate names or Social Security numbers for an individual, such as a nickname, maiden name, or previous name (a name before a name change). The name and address management program (ADR) uses the information on this screen to create the name format that appears on an envelope or salutation. You can perform queries on alternate names or Social Security numbers.

Each record on this screen contains information on one alternate name. You can enter multiple records.

### Example

Following is an example of an Other Name detail window.

The screenshot shows a software window titled "Other Name". At the top right, it says "Record 1 of 1". The window contains two main sections for data entry. The first section is for a record with "Alt Name" set to "Mike Harper", "Alt SS#" as an empty field, "Code Stl" set to "S", "Active" checked, and "Inactive" unchecked. Below these are fields for "Alt Title", "Alt Suffix", "Sec ID/Name" (set to "0"), "Used by" (set to "5106421"), and "Office Added By" (set to "DEVL" with a dropdown arrow). The second section is identical but empty.

## Fields

The following fields appear on the Other Name detail window.

### Active

The beginning date (mm/dd/yyyy) in a range specifying when the entry becomes active for ADR use. This field defaults to today's date.

**Note** This date does not apply to previous names and Social Security numbers. This date only applies to names used by ADR. However, ID Query will allow queries on all previous names and Social Security numbers.

### Alt Name

The individual's alternate name and how the individual(s) wants to be addressed.

**Example:** John and Jeanne Doe; Doe, Jeanne

### Alt SS#

The individual's alternate Social Security number. This field is used when performing queries if an alternate Social Security number is known.

### Alt Suffix

A sequence of letters at the end of the individual's name representing an alternate professional title (e.g., MD for a Doctor of Medicine). Use Table Lookup for a list of valid codes.

**Note** The name and address management program (ADR) uses the Suffix field to format a name. ADR distinguishes between a professional suffix (e.g., M.D.) and a family suffix (e.g., Jr.). The family suffix remains a part of the Name field.

### Alt Title

The individual's alternate title, such as Miss, Mr., or Dr. Use Table Lookup for a list of valid values.

### Code

A code indicating whether you want the individual's name you are entering to appear either on a label or as a salutation for a letter. Valid values are:

- L(abel)
- S(alutation)

**Inactive**

The ending date (mm/dd/yyyy) in a range specifying when the entry is no longer active for ADR use.

**Office Added By**

A code indicating the office at your institution that added the name record to this screen. Use Table Lookup for a list of valid codes.

**Example:** ADMS for Admission

**Sec Id/Name**

The identification number or name of an associated individual, if applicable. Use <F6> to perform an ID Query.

**Stl**

A code indicating a specific style of the alternate name. Use Table Lookup for a list of valid codes.

- F – formal, such as Smith, Jonathan A
- N – nickname, such as Smith, Johnny
- P – previous name

**Used By**

An ID number that has exclusive use of this alternate name.

**Example:** An administrator at your institution might personally know and call an individual by his middle name (Patrick), but that individual is officially known by his first name (James). The administrator can personalize correspondence with this individual by creating an Other Name record using this screen. The Name field could contain that individual's middle name (Patrick), and the Used by field could contain the administrator's ID number.

## Commands

The following commands are available from the Other Name detail window.

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Lets you to move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Lets you to move forward through a list of records.

**Scroll**

Updates the detail window information.

## Other/Alternate Address Detail Window

The Other/Alternate Address detail window enables you to do the following:

- Enter multiple addresses for a student, such as a summer, winter, previous, or billing address.
- Enter an address that is too long to fit in the space provided by the entry screens, since some international addresses require three lines for an address rather than the standard two lines.
- Specify date ranges used by the name and address program (ADR) to select appropriate addresses for correspondence.

Each record on this screen contains information about one address. You can enter multiple records.

### Example

Following is an example of an Other/Alternate Address detail window.

The screenshot shows a window titled "Other/Alternate Address". It contains a table with the following columns: Code, Description, Yrly, Begin, End, Office, Phone, and Ext Prior. The first record is for a "Summer Address" with Code "SUMR", Yrly "N", Begin "05/10/2009", End "08/29/2009", Office "DEVL", Phone "799-555-4890", and Ext Prior "15". Below the table, there are three address entry sections. The first section is for the "Summer Address" and contains three lines of address: "521 Waterside Terr.", "Traverse City", and "USA". The second and third sections are for other address types and are currently empty.

Code	Description	Yrly	Begin	End	Office	Phone	Ext Prior
SUMR	Summer Address	N	05/10/2009	08/29/2009	DEVL	799-555-4890	15

1: 521 Waterside Terr.  
 2:   
 3:   
 City: Traverse City  
 State: MI  
 Zip: 48746  
 Ctry: USA

1:   
 2:   
 3:   
 City:   
 State:   
 Zip:   
 Ctry:

1:   
 2:   
 3:   
 City:   
 State:   
 Zip:   
 Ctry:

### Fields

The following fields appear on the Other/Alternate Address detail window.

1

The first line of an individual's address.

2

The second line of an individual's address.

3

The third line of an individual's address.

**Begin**

The date (mm/dd/yyyy) on which an alternate address becomes valid.

**City**

The city of an individual's alternate address (e.g., Palm Springs).

**Code**

A code indicating the type of alternate address for the individual. Use Table Lookup for a list of valid codes.

**Example:** BUS for business address, LOC for local address, SUMR for summer address

**Ctry**

The country of an individual's alternate address.

**Description**

Displays a description of the code field. The system displays this description after you enter a valid code in the Code field.

**End**

The date on which an alternate address is no longer valid for the individual.

**Ext**

The telephone extension number of an individual at the individual's alternate address.

**Office**

A code indicating which office at your institution is adding the alternate address (e.g., ADMS for admission). Use Table Lookup for a list of valid codes.

**Phone**

An individual's permanent telephone number at the individual's alternate address.

**Prior**

A number identifying the priority of an alternate address.

**Note**

When you select Table Lookup for the Code field, a priority number appears to the right of each code on the Table Lookup screen. The lower the number, the higher the priority for that alternate address code. The name and address management program (ADR) selects the lowest priority for mailings based on several checks. Priority numbering is a policy decision that your institution makes.

**State**

A code identifying the state of an individual's alternate address.

**Yrly**

Either Y(es) or N(o) specifying whether the alternate address is valid each year between the specified date range.

**ZIP**

The ZIP code for an individual's alternate address.

## Commands

The following commands are available from the Other/Address Detail window.

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Lets you move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Lets you move forward through a list of records.

**Scroll**

Updates the detail window information.

## Parent Form Screen

The Parent Form screen enables you to view, add, and update constituent information for a parent.

### Example

Following is an example of the Parent Form screen.

The screenshot displays the 'Constituent Profile - Parent Form' window. It features a menu bar with 'File', 'Edit', 'Commands', and 'Help'. Below the menu is a toolbar with icons for search, save, and exit. The main area contains various input fields and dropdown menus organized into two columns. The left column includes fields for ID No., Title, Name, Suffix, Address, City, State/Zip, and Child ID. The right column includes fields for SS No., Add Date, Last Update, Telephone, Deceased, Correct Address, Alternate Address, Date, and Rel Code. The data entered in the fields is as follows:

Field	Value
ID No.	5107812
SS No.	
Add Date	02/10/2009
Title	MR
Last Update	02/10/2009
Name	Harper, Daniel A.
Telephone	513-555-7819
Suffix	
Deceased	N
Address	5233 Whetstone Cir.
Correct Address	Y
City	Cincinnati
Alternate Address	PERM
State/Zip	OH 45215
Country	USA
Child ID	5107811
Date	
Rel Code	PC Parent/Child

### Fields

The following fields appear on the Parent Form screen.

**Add Date**

The date the system added the ID record to the database. A display-only field, the system enters this information.

**Address**

The parent's permanent address appearing in the parent's ID record. You can enter up to two lines of address information.



**Alternate Address**

A code identifying the type of address that appears in the Address field (e.g., PERM if it is permanent). Use Table Lookup for a list of valid codes.

**Child ID**

The ID number of the child associated with the parent. Press <F6> to perform a query. The system enters the name below.

**City**

The city of the parent's permanent address appearing in the parent's ID record.

**Correct Address**

Y(es) or N(o) field that indicates whether the address on the record is correct. If desired, you can configure your system to prompt you to change this value from N to Y when you enter a new address, since it is likely the new address is correct, even if the prior address was incorrect.

**Country**

The country of the parent's permanent address appearing in the parent's ID record (e.g., USA for the United States). Use Table Lookup for a list of valid countries.

**Date**

The date (mm/dd/yyyy) the Parent/Child relationship began or became known.

**Deceased**

These are two fields. The first field is the code indicating if the parent is deceased (Y) or not (N). If Y, the second field is the date (mm/dd/yyyy) the parent passed away.

**ID No**

The system-generated number identifying the parent in the database.

**Last Update**

The date the ID record was last updated by the system or a user. A display-only field, the system enters this information.

**Name**

The parent's name in the format: last name, first name middle name (or initial), family suffix (e.g., Jr., Sr., III, etc.).

**Note** The two commas separating the middle name (or initial) and family suffix is a flag the system uses so that the name prints correctly in reports, etc. (e.g., Doe, John J., Jr. would print as John J. Doe, Jr.).

**Rel Code**

These are two fields. The first field is the Relationship code identifying the relationship, such as PC for Parent/Child. The second field is the description of the code. Display-only fields, the system enters this information.

**SS No**

The parent's Social Security number appearing in the parent's ID record (e.g., 232-32-3232).

**State/ZIP**

These are two fields. The first field is the two-letter state abbreviation and the second field is the ZIP code of the parent's permanent address appearing in the parent's ID record. Use Table Lookup for a list of valid states and ZIP codes.

**Suffix**

A letter or sequence of letters at the end of the parent's name representing a professional title (e.g., MD for a Doctor of Medicine). Use Table Lookup for a list of valid codes.

**Note** The name and address management program (ADR) uses the Suffix field to format a name. ADR distinguishes between a professional suffix (e.g., M.D.) and a family suffix (e.g., Jr.). The family suffix remains a part of the Name field.

**Telephone**

The parent's permanent telephone number appearing in the parent's ID record (e.g., 406-555-3333).

**Title**

A code identifying the parent's title appearing in the parent's ID record (e.g., DRMS). Use Table Lookup for a list of valid codes. The system enters the description of the code to the right.

## Commands

The following commands are available from the Parent Form screen.

**Note** You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

**Auto-Mode**

By-passes the Display mode and automatically puts the screen into Query mode, then Update or Insert mode.

**Cancel**

In Insert, Query, and Update modes, does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Close**

Enables you to close the ID Types/Associated Records window.

**Detail**

In Display, Insert, and Update modes, displays the detail windows enabling you to select multiple-item information, or records, associated with the ID number.

**Display ID**

In Query mode, enters information into the fields for the ID being queried. Enables you to select it or query on another.

**Exit**

Enables you to quit the program and return to the menu.

**Find ID**

In Query mode, accesses the ID Query screen. Enables you to enter additional search criteria (e.g., name, Social Security number, etc.) and narrow the search for an ID record.

**Finish**

In Insert and Update modes, saves your field entries when you have completed your data entry or selection and want to continue.

**Finished**

Enables you to close the ID Types/Associated Records window.

**ID-Type**

In Display, Insert, Query, and Update modes, displays the view-only ID Type/Associated Records window containing information about the parent. The window contains a variety of logical Y(es)/N(o) fields; the codes in the fields vary, depending on the types of records that exist in the system for the parent. For example:

- If the parent has a Alumni record, the Alumni field contains Y
- If the parent has a Donor record, the Donor field contains Y

**Insert**

Puts the screen into Insert mode; enables you to add a new record.

**Note** This command appears after you select **Query**, then **Find ID**. At the ID Query screen, select **Cancel** to return to the Parent Form screen.

**Menu**

Returns you to the initial Forms menu; enables you to select another form.

**Query**

Puts the screen into Query mode; enables you to query on an ID or Social Security number.

**Select**

In Query mode, enables you to select the ID or Social Security number entered and searches for the associated ID record.

**Update**

In Query mode, puts the screen into Update mode; enables you to update the record(s).

---

## Program Enrollment Detail Window

The Program Enrollment detail window enables you to add or update the following for a student:

- Program code (e.g., UNDG for Undergraduate)
- Class code (e.g., SR for Senior)
- Major code (e.g., ENG for English)

Each Program Enrollment record for a student contains information from one academic program.

## Access

Access the Program Enrollment Detail window by selecting the following: **Student Management > Housing/Events > Housing Data Entry**. These selections call up the Student Housing Form screen. Then perform the following:

1. Query and select the desired student.
2. Select Detail (or select Update, and then Detail, to open the window in Edit mode).

- Choose Program from the Detail windows menu.

**Note** You can access this window from multiple modules; as a result, different access paths may exist.

## Example

Following is an example of the Program Enrollment detail window.

Code Program Text	CL Major 1/2 Description	Record 1 of 1	Site
UNDG Undergraduate	F1 ANTH Anthropology		CARS

## Fields

The following fields that appear on the Program Enrollment detail window.

### CL

The student's class code (e.g., FR for Freshman).

### Code

The academic program code (e.g., UNDG).

### Description

The description of the code appearing in the Major 1/2 field (e.g., Computer Science and Physics).

**Note** The system automatically enters the description when you enter a valid code in the Major 1/2 field.

### Major 1/2

The student's primary and secondary major (e.g., CSC and PHY).

### Program Text

The description of the academic program code (e.g., Undergraduate).

**Note** The system automatically enters the description of the academic program when you enter a valid program code in the Code field.

### Site

The institution site that the student attended or is attending for this program.

## Commands

The following commands are available from the Program Enrollment detail window.

**Note** You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

**Back**

Moves you back through a list of records.

**Cancel**

Exits the detail window without saving any field entries.

**Del-line**

Deletes a record.

**Finish**

Saves any field entries and exits the detail window.

**Forward**

Moves you forward through a list of records.

**Insert**

Places the screen in Insert mode so you can add a record.

**Scroll**

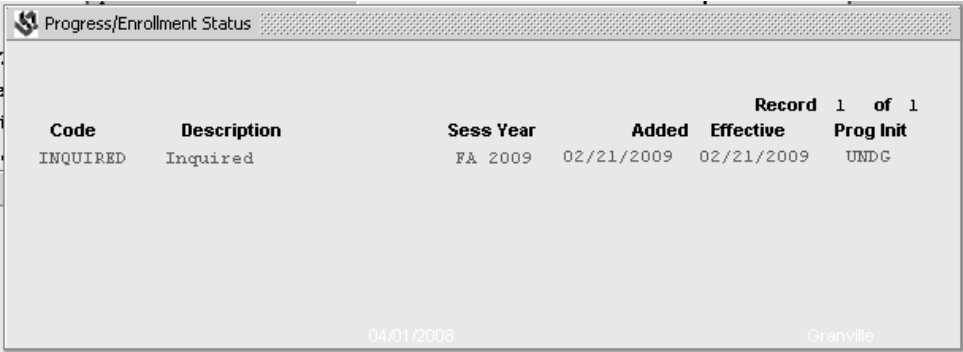
Accesses the Detail windows menu.

## Progress/Enrollment Status Detail Window

The Progress/Enrollment Status detail window is a view-only screen that allows you to view a student's progression through the admissions process, as well as the student's current enrollment status.

### Example

Following is an example of a Progress/Enrollment Status detail window.



Code	Description	Sess Year	Added	Effective	Prog Init
INQUIRED	Inquired	FA 2009	02/21/2009	02/21/2009	UNDG

04/01/2008 Granville

### Fields

The following fields appear on the Progress/Enrollment Status detail window.

**Added**

Displays the date on which your institution changed a student's status. A student's status changes based on the code in your institution's Enrollment Sequence table.

**Code**

Displays a code indicating the stage at which a student is located in the admissions process.

**Example:** INQUIRED, APPLIED, COMPLETE

**Description**

A description of the code in the Code field.

**Effective**

The date on which a student's status becomes effective.

**Init**

A code indicating whether correspondence is incoming (I) or outgoing (O).

**Prog**

A code indicating the program in which a student is planning to enroll at your institution.

**Example:** UNDG for undergraduate

**Sess**

A code indicating the session for which a student is applying for admission.

**Example:** FA for Fall

**Year**

The year in which a student plans to enroll at your institution.

## Commands

The following commands are available from the Progress/Enrollment Status detail window:

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Lets you to move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Lets you to move forward through a list of records.

**Scroll**

Updates the detail window information.

## Prospect/Applicant History Detail Window

The Prospect/Applicant History detail window enables you to view information about a student's previous applications, as well as the latest status on the current application.

### Example

Following is an example of a Prospect/Applicant History detail window.

The screenshot shows a window titled "Prospect/Applicant History" with a record count of "Record 1 of 1". The data is organized into three columns:

<b>Prior Sess/Yr:</b>	<input type="text" value="0"/>	<b>Program:</b>	UNDG	<b>Add Date:</b>	01/15/2009
<b>Prev. Apply:</b>	N	<b>Classification:</b>	FF	<b>Transfer:</b>	N
<b>Financial Aid:</b>	Y	<b>Full/Part-time:</b>		<b>Housing:</b>	R
<b>Vet Benefits:</b>	N	<b>Early Decision:</b>	N	<b>Ed Goal:</b>	B
<b>Major:</b>	UNDE	<b>Decision Code:</b>	FULL	<b>Dec Date:</b>	04/28/2009
<b>Referral:</b>		<b>Waitlist Rank:</b>		<b>Degree:</b>	
<b>Last Status:</b>	APPLIED	<b>Last Status Date:</b>	03/12/2009		
<b>Prev Status:</b>	INQUIRED	<b>Previous Status Date:</b>	01/15/2009		
<b>Counselor ID:</b> 527776 Martin, Daniel R.					

### Fields

The following fields appear on the Prospect/Applicant History detail window.

#### Add Date

Displays the date when your institution added the ID record to the database. You cannot change this date.

#### Classification

A code indicating the category in which your institution places a student at the time the student is accepted to your institution.

**Example:** FF first time freshman, TR transfer student.

#### Counselor ID

The identification number and name of the student's admissions counselor at your institution.

**Example:** 20522 Smith, Betty B.

**Note** If you do not know the counselor's identification number, select Table Lookup to find this information. If the counselor does not have an ID number (e.g., it is not in the database), leave this field blank.

#### Decision Code

A code representing your institution's decision regarding a student's admission.

**Example:** FULL for full acceptance, PROB for probationary acceptance

#### Dec Date

The date (mm/dd/yyyy) on which your institution made or expects to make a decision to admit or reject an applicant.

**Early Decision**

Either Y(es) or N(o) specifying whether a student is applying for early decision at your institution.

**Note** A typical early decision program is one in which a student applies to a school and is informed of acceptance six months to a year before the student plans to attend.

**Ed Goal**

A code indicating the degree a student intends to obtain at your institution (e.g., B for Bachelors).

**Financial Aid**

Either Y(es) or N(o) indicating whether a student is applying for financial aid.

**Full/Part time**

The number of credit hours a student intends to take for the planned enrollment session.

**Note** Be familiar with your institution's policy on the number of credit hours that a student must take to be considered a full-time student.

**Housing**

A code that indicates the type of housing in which a student intends to reside.

**Example:**

- C for commuter if the student intends to live at home and commute to your institution
- L for local if the student is a native of the city in which your institution is located
- R for resident if the student intends to live on campus

**Last Status**

Displays a code indicating the latest stage at which the student was located in the admission process. You cannot change this code.

**Example:** APPLIED for a student who has applied for admission to your institution, INQUIRED for a student who has inquired about your institution

**Last Status Date**

Displays the last date your institution received notice either establishing a status for a student or requiring that a student be given a new status. You cannot change this field.

**Major**

A code identifying a student's intended major.

**Example:** UNDE for undecided

**Note** If the student has not yet declared an intended major, this field is blank.

**Prev Status**

Displays the code indicating the previous stage at which the student was located in the admission process. You cannot change this code.

**Example:** APPLIED for a student who has applied for admission to your institution, INQUIRED for a student who has inquired about your institution



**Prev. Apply**

Either Y(es) or N(o) specifying whether a student has previously applied for admission to your institution.

**Previous Status Date**

Displays the previous date your institution received notice either establishing a status for a student or requiring that a student be given a new status. You cannot change this field.

**Prior Sess/Yr**

The session (such as FALL) and year (such as 2011) the student last applied for admission.

**Program**

Displays a code specifying the program in which a student plans to enroll at your institution. You cannot change this field.

**Example:** UNDG for undergraduate program

**Referral**

A code identifying the person, organization, or service that informed a student about your institution.

**Example:** ALUM for alumni

**Note** Use Table Lookup to find this information, if it exists. Otherwise, leave this field blank.

**Transfer**

Either Y(es) or N(o) specifying whether a student is transferring from another institution to your institution.

**Vet Benefits**

Either Y(es) or N(o) indicating whether an applicant is eligible for or is currently receiving veteran benefits.

## Commands

The following commands are available from the Prospect/Applicant detail window:

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Allows you to move back through a list of records.

**Cancel**

Allows you to exit from the screen without saving any field entries.

**Del-line**

Allows you to delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**Forward**

Allows you to move forward through a list of records.

**Scroll**

Updates the detail window information.

## Schedule Recruiter Detail Window

The Schedule Recruiter detail window enables you to enter information about a scheduled high school or college visit including date and time, location and the current status. You access this window from a Schedule Entry screen.

### Example

The following is an example of the Schedule Recruiter detail window.

Recruitment Trips

Record 1 of 1

CF Stat	ID	Location/Phone/Ext	LC	Date	Time
N	S 51005	Agoura High School	HS	04/12/2009	0

GOOD 14

Well organized, as scheduled

Of the 14 students seen, 12 a

Additional fields (repeated twice):

- Dropdown menu
- Text box

### Fields

The following fields appear on the Schedule Recruiter detail window. You can use Table Lookup for a list of valid entries for most of these fields.

#### CF

A Y(es)/N(o) value that answers the question, “Has this scheduled event been confirmed?”

#### Date

The scheduled date (dd/mm/yyyy) of the event.

#### ID

The ID number of the location where the event will be held (e.g., 12345).

#### LC

The type of location where the event is to occur. Valid values are as follows:

- CF (College fair)
- CH (Church fair)
- CO (College visit)
- HS (High school visit)
- JC (Junior College visit)
- JH (Junior High visit)

**Location/Phone/Ext**

Display only – Information about the location, phone number, and extension relating to the ID number.

**Stat**

A value indicating the event status. Valid values are as follows:

- S (The event is scheduled)
- F (The event is finished)
- P (The event has been postponed)
- C (The event has been canceled)
- T (The event is tentatively scheduled)

**Note**

The above values are defined in the following file:

- \$CARSPATH/macros/custom/common/SCHD\_PLACE\_VALID

**Time**

The time the event is to occur (e.g., 1100 for 11:00 a.m.)

**(Unlabeled Text Field)**

Any pertinent information concerning the scheduling of the event or the event itself.

---

## Schedule Entry Screen

The Schedule Entry screen enables you to create schedule records that are used to track high school and college visits as well as generate letters to prospects.

### Example

The following is an example of the Schedule Entry screen. In this example, the Go to.... dropdown list is open to show the detail windows associated with the screen.

## Fields

The following fields appear on the Schedule Entry screen.

### Add Date

The date (mm/dd/yyyy) when the event was first scheduled.

### Address

The street address of the event location.

### Alternate Address Code

A code identifying the type of address (e.g., permanent, business, local). Use Table Lookup for a list of valid entries.

### City

The city of the event location.

### Country

The country of the event location. Use Table Lookup for a list of valid entries.

### ID No

The identification number of the contact or the place where the event will be held.

### Last Upd

The date (mm/dd/yyyy) of the last update made to this scheduled event.

### Name

The name of the location or contact person for this event.

### SSN

The federal tax ID or Social Security number of the contact or location.

**State/ZIP**

The state and ZIP code of the event location. Use Table Lookup for a list of valid entries.

**Title**

The title of the contact person.

## Commands

The following commands are available from the Schedule Entry screen:

**Note** You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select **Commands** from the menu bar.

**Cancel**

Allows you to exit from the screen without saving any field entries.

**Detail**

In Update mode, displays the Schedule Activities Detail window.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

**ID-Type**

In Update mode, displays the ID-Type/Associated Record screen on which you can enter additional information about the event.

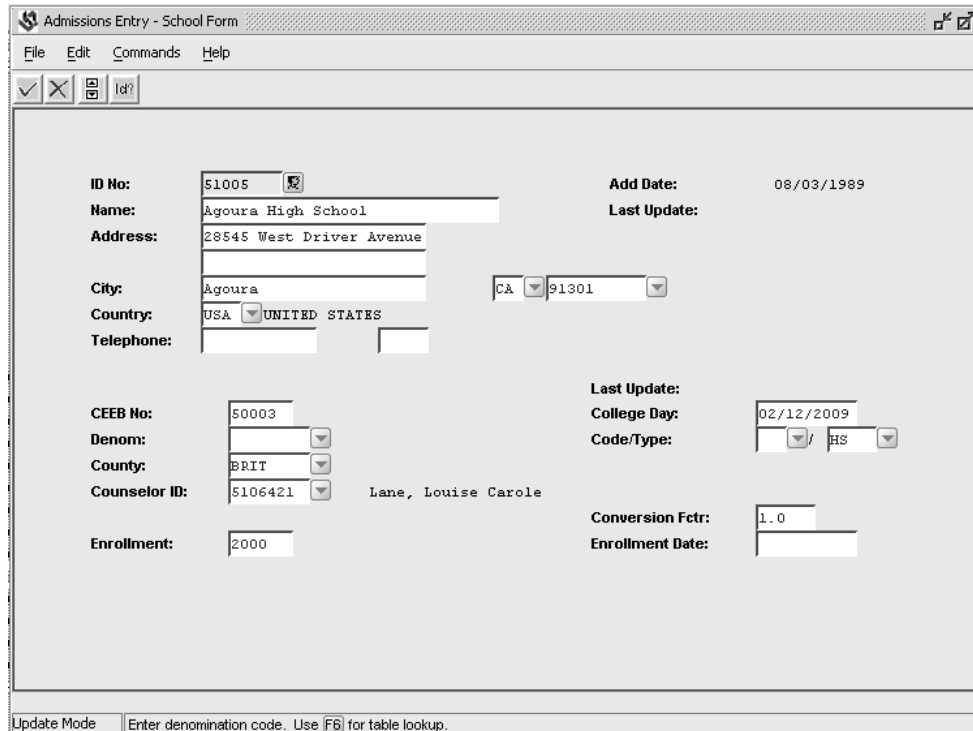
---

## School Form Screen

The School Form screen allows you to view, add, and update constituent information for a school.

## Example

Following is an example of the School Form screen.



**Admissions Entry - School Form**

File Edit Commands Help

✓ ✕ ?

**ID No:** 51005 **Add Date:** 08/03/1989

**Name:** Agoura High School **Last Update:**

**Address:** 28545 West Driver Avenue

**City:** Agoura **CA** 91301

**Country:** USA **UNITED STATES**

**Telephone:**

**CEEB No:** 50003 **Last Update:**

**Denom:** **College Day:** 02/12/2009

**County:** BRIT **Code/Type:** HS

**Counselor ID:** 5106421 Lane, Louise Carole

**Enrollment:** 2000 **Conversion Fctr:** 1.0

**Enrollment Date:**

Update Mode Enter denomination code. Use [F6] for table lookup.

## Fields

The following appear on the School Form screen.

### Add Date

The date the system added the ID record to the database. A display-only field, the system enters this information.

### Address

The school's permanent address appearing in the school's ID record. You can enter up to two lines of address information.

### CEEB No

The number assigned to the school by the College Entrance Examination Board (CEEB).

### CEEB/Fed ID

The number assigned to the school by the College Entrance Examination Board (CEEB), or the school's federal ID or Social Security number appearing in the school's ID record.

### City

The city of the school's permanent address appearing in the school's ID record.

### Code/Type

These are two fields. The first field is a code indicating whether the school is a private (PR) or a public (PU) institution. The second field identifies the type of school. Valid codes are:

- CC (Community College)
- COL (College)
- GRAD (Graduate School)

- HS (High School)

**College Day**

The date (mm/dd/yyyy) of the college fair at the school.

**Conversion Fctr**

The number (or factor) used to convert the school's credit hours to your institution's hours (e.g., 1.0 means that for every one credit hour taken at this school, 1.0 credit hour is applied to the student's transcript).

**Country**

A code identifying the country of the school's permanent address appearing in the school's ID record (e.g., USA for the United States). Use Table Lookup for a list of valid countries. The system displays the description of the code to the right of the field.

**Denom**

A code identifying the school's denomination. Use Table Lookup for a list of valid codes.

**Enrollment**

The number of students enrolled at the school.

**Enrollment Date**

The date (mm/dd/yyyy) the number of students enrolled at the school was effective. If you are adding constituent information for a school, defaults to the current date.

**ID No**

The system-generated number identifying the school in the database.

**Last Update (lower field)**

The date the School record was last updated by the system or a user. A display-only field, the system enters this information.

**Last Update (upper field)**

The date the ID record was last updated by the system or a user. A display-only field, the system enters this information.

**Name**

The school's name.

**(State)**

This is an unlabeled field located to the right of the City field. The two-letter state abbreviation of the school's permanent address appearing in the school's ID record. Use Table Lookup for a list of valid states.

**Telephone**

These are two fields. The first field is the school's permanent telephone number appearing in the school's ID record (e.g., 513-563-4542). The second field is the school's extension number, if necessary.

**(ZIP)**

This is an unlabeled field located to the right of the (State) field. The ZIP code of the school's permanent address appearing in the school's ID record. Use Table Lookup for a list of valid ZIP codes.

## Commands

The following commands are available from the School Form screen:

**Note** You can use a specific command only when that command appears on the current command line, toolbar, menu, or when it is black (not dimmed) on the list that appears when you select Commands from the menu bar.

**Auto-Mode**

By-passes the Display mode and automatically puts the screen into Query mode, then Update or Insert mode.

**Cancel**

In Insert, Query, and Update modes, does one or all of the following without saving any of the field entries you have made:

- Backs out of the current command
- Returns to the previous command
- Exits from the current screen

**Close**

Enables you to close the ID Types/Associated Records window.

**Detail**

In Display, Insert, and Update modes, displays the Detail windows enabling you to select multiple-item information, or records, associated with the ID number.

**Display ID**

In Query mode, enters information into the fields for the ID being queried. Enables you to select it or query on another.

**Exit**

Enables you to quit the program and return to the menu.

**Find ID**

In Query mode, accesses the ID Query screen. Enables you to enter additional search criteria (e.g., name, Social Security number, etc.) and narrow the search for an ID record.

**Finish**

In Insert and Update modes, saves your field entries when you have completed your data entry or selection and want to continue.

**Finished**

Enables you to close the ID Types/Associated Records window.

**ID-Type**

In Display, Insert, Query, and Update modes, displays the view-only ID Type/Associated Records window containing information about the school. The window contains a variety of logical Y(es)/N(o) fields; the codes in the fields vary, depending on the types of records that exist for the school. For example:

- If the school has a Donor record, the Donor field contains Y
- If the school has a Constituent record, the Constituent field contains Y

**Insert**

Puts the screen into Insert mode. Enables you to add a new record.

**Note** This command appears after you select Query, then Find ID. At the ID Query screen, select **Cancel** to return to the School Form screen.

**Menu**

Returns you to the initial Forms menu. Enables you to select another form.



**Query**

Puts the screen into Query mode; enables you to query on an ID or Social Security number.

**Select**

In Query mode, enables you to select the ID or Social Security number entered and searches for the associated ID record.

**Update**

In Query mode, puts the screen into Update mode; enables you to update the record(s).

---

## Second Relationship Detail Window

The Second Relationship detail window enables you to enter relationships that exist between individuals and organizations connected with your institution in some way. It contains relationships between any of the following:

- Two individuals
- Two organizations
- An individual and an organization

For example, you can enter a relationship between a parent and a child (who is also a student), or between your institution and a student worker. A relationship important to an Admission office is one between a prospective student and the student's parents, since many institutions send letters to the parents of the students they are recruiting.

The major component of this screen is the relationship ID code that represents the type of relationship about which you are entering information. This code helps you to determine whether you enter information in the First Relationship screen or the Second Relationship screen. Examples of relationship ID codes include the following:

- CE for Company/Employee
- MD for Mother/Daughter

Each record on this screen contains information on one relationship. For example, if you enter two relationships, there are two separate records.

## Which Relationship Screen Should You Use?

Enter information in the Second Relationship detail window when the right side of the relationship ID code (e.g., the wife in the code "HW" for husband/wife) represents the individual or organization whose record you are currently adding or updating on the entry screen.

## Example

Following is an example of a completed Second Relationship detail window.

Second Relationship

Record 1 of 1

The person selected above is on the RIGHT side of the relationship code.

Rel ID	Name	Code	Begin	End	Prt	Mnt
5107812	Harper, Daniel A.	PC			Y	Y

## Fields

The following fields appear on the Second Relationship Detail window.

### Begin

The date on which a relationship began or became known.

**Example:** 09/10/2010 for a student's date of hire

### Code

A code that indicates the type of relationship between two individuals, two organizations, or an individual and an organization.

**Example:** CE for Company/Employee, FD for Father/Daughter

**Note** Keep in mind that the individual or organization whose record you are currently adding or updating is on the right side of the relationship ID code (e.g., the daughter in the code "FD" for father/daughter).

### End

A date indicating the last day of a relationship. Leave this field blank if it does not apply to a relationship.

**Example:** 05/20/2010 for a student's date of termination of employment.

### Name

The name of an individual or organization on the right side of a relationship. The system displays the name automatically when you enter a valid ID number in the Rel ID field.

**Example:** Doe, Jane for the daughter in the father/daughter relationship

### Print

A code indicating whether the name of the individual or organization on the right side of a relationship should be placed first on correspondence.

### Rel Id

The identification number for the individual or organization on the left side of a relationship.

**Example:** 67890 for John J. Doe, Jr. in the father/daughter relationship.

## Commands

The following commands are available from the Second Relationship detail window.

### Add

Places the screen in Add mode so you can make entries to add a record.

### Back

Lets you to move back through a list of records.

### Cancel

Lets you exit from the screen without saving any field entries.

### Del-line

Lets you delete a record.

### Finish

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits you from the screen.

### Forward

Lets you to move forward through a list of records.

### Scroll

Updates the detail window information.

## Tests/Exams Detail Window

The Tests/Exams detail window enables you to view and enter test and exam scores such as ACT, SAT, and GMAT. Each record on this screen contains information on one test or exam that a student takes.

## Example

Following is an example of a Tests/Exams detail window.

Code	Date	Sess	Year	Prog	Comment	Record 1 of 1	SelfRpt
SAT	02/10/2009	FA	2009	UNDG			N
Verbal	528	MATH	481	READING	659	Vocabulary	681
						TSWE	581

## Fields

The following fields appear on the Tests/Exams Detail window.

### Code

A code indicating the name of a test or exam that a student has taken.

**Example:** ACT, GMAT, SAT

**Note** If you enter the code for the ACT or SAT exams, the system automatically displays the components of each exam and the corresponding score for each component. For example, when you enter SAT as the exam code, the system displays “Verbal,” “Math,” “Reading,” “Vocabulary,” and “TSWE” in addition to a default score of 0 to the right of each component. TSWE refers to the Test of Standard Written English.

**Comment**

Any additional information you want to enter regarding a test or exam.

**Example:** Second time to take test

**Date**

The date (mm/dd/yyyy) on which a student took a test or exam.

**Prog**

A code linking the test or exam in the Code field to a program.

**Example:** UNDG for undergraduate program

**Sess**

A code indicating the session in which a student took a test or exam.

**Example:** FA for fall

**Year**

The year in which a student took a test or exam.

## Commands

The following commands are available from the Text/Exams detail window.

**Add**

Places the screen in Add mode so you can make entries to add a record.

**Back**

Lets you to move back through a list of records.

**Cancel**

Lets you exit from the screen without saving any field entries.

**Del-line**

Lets you delete a record.

**Finish**

In Query mode, selects the specified ID.

In Update mode, saves any field entries and exits from the screen.

**Forward**

Lets you to move forward through a list of records.

**Scroll**

Updates the detail window information.



# Managing Your Processes

---

The purpose of this section is to introduce you to the capability in the system to complete tasks in the background, schedule processes for later execution, and suspend tasks.

---

## Ways to Manage Processes

You can use the following methods to manage your processes.

### Performing tasks in the background

Executing a program or process that requires no further input, while you access another process or screen in the system.

### Scheduling processes

Executing a program at some later specified time or date, instead of executing it immediately.

### Suspending tasks

Temporarily freezing a process or screen while you access another process or screen in the system.

---

## Exiting When Tasks are Active

The standard system does not permit you to exit when you are running background tasks, or when you have suspended tasks. If you attempt to exit while such tasks exist, the system will display the message “Background tasks exist,” and the menu from which you tried to exit will continue to appear on your screen.

**Note** If desired, your Jenzabar coordinator can override this feature. You can exit from the menu system while still working in an application, without affecting the processing within the application.

### CAUTION

While it is possible to exit from a process using the Windows Exit command, Jenzabar strongly suggests that you do not use this exit approach since it causes processes to end abnormally. If you have background or suspended tasks and wish to leave your computer, use the Lock Screen option to prevent others from using your computer in your absence.

---

## Executing Tasks

You can run processes or tasks in the background or the foreground. If you run in the foreground, you wait for the results and can view the output as soon as it is completed. When you run processes and complete tasks that do not require any further information from you, you can run them in the background. This option is useful because you may continue to use your computer for other work while the system automatically controls the execution of your background

task(s). For example, you can run a report in background mode at the same time you use an entry program to enter data.

Background tasks differ from scheduled processes. You submit a task for immediate background processing while you continue to work on other tasks. In contrast, you schedule tasks for later processing so the system can complete processes that are not time-critical at a less busy time of day, or at the time when the processes are needed. Additionally, background tasks can be brought to the foreground while a scheduled process cannot.

Since the Jenzabar CX 8.1 menu has enhanced multi-tasking capabilities for applications, users should avoid running jobs in the foreground as it prevents the menu window from accepting input until the processes complete.

**Note** You can also run tasks in the background by opening another window and selecting another menu or software package to use.

## Using the Output Parameters and Scheduling Window

When you are ready to execute any task (that is, after you have provided all the information the program needs to complete), the system displays the Output Parameters and Scheduling window, as shown at the bottom of the following example. This window controls whether your processes run in the background or foreground, and also determines where output from your process is routed.

The screenshot shows the Jenzabar CX Menu application. The main window has a menu bar with 'File', 'Edit', 'Commands', and 'Help'. Below the menu bar is a status bar with keyboard shortcuts: 'F9 finish', 'Esc cancel', and 'Ctrl+W help'. The main content area is titled 'ADD SCHOOL VISITATION CONTACTS' and contains several input fields with dropdown menus:

- School ID: 0
- Planned Enrollment Session: [dropdown]
- Planned Enrollment Year: 2007
- Year: >=
- Program: UNDC
- Status: DENIED
- Counselor ID: 0
- Due Date: 02/10/2009
- Tickler: [dropdown]
- Resource: [dropdown]

At the bottom of the main window, there is a sub-window titled 'OUTPUT PARAMETERS' and 'SCHEDULING'. This sub-window contains the following fields:

- Mode: [dropdown]
- File: [text field]
- Time: 1100P
- Day: [text field]
- Background: N

At the very bottom of the application window, there is a status bar with the text: 'Enter time of day this will run, or NOW for immediate.'

## Description of Display Contents

The above example display contains two kinds of information, as follows:

- Entry fields where you enter the necessary parameters or other information for completing the process.
- An Output Parameters and Scheduling window into which you enter the output and schedule information for completing the process.

The Output Parameters and Scheduling window is a standard window that does not change regardless of the program in which it is used. Active fields may vary, however, depending on what options you select.

## Fields on the Output Parameters and Scheduling Window

The window contains the following fields:

### Mode

A listing of the output options you have. Typically, the list contains all the appropriate printers and viewing options that you support at your institution. Note that some of the options are reserved, as follows:

- *more* – routes the output to a window viewer so you can see it as soon as the process is complete.
- *screen* – the default value; functionally the same as *more*, and typically used with versions of CX earlier than 8.1.
- *viewer* – functionally the same as *more*, and typically used with CX 8.1.
- *email* – causes the system to attach the output to an email message sent to your local account. If your local email is forwarded to a PC mail program (e.g., Outlook), the message and its attachment will be available there. This serves to upload your output to your PC and to make it available to be shared easily with other users.

### CAUTION

Make sure you do not forward any sensitive information using this feature.

- *file* – creates a file in your home directory.

Institutions can modify the values that appear in the Mode list by changing the macros OUTPUT\_VALID, \$CARSPRINTERS, and PAGER\_VALID in \$CARSPATH/macros/user/common. Administrators can change the default pager ("screen") by updating PAGER\_DEF. PAGER\_VALID needs to contain the value defined in PAGER\_DEF.

### File

The name of the file generated from the process. You can change the file names if desired, unless the File field is inactive (grayed out). Note that the field accepts any extension if the Mode is email. If you intend to email your process's results, you should select an extension that can open automatically with one of your computer applications (e.g., a .doc or .xls file). If you plan to route your output to a file (that is, to your home directory), the typical extension is .out.

### Note

The field will only accept extensions if administrators permit it by setting "allow\_filename\_extensions" in \$CARSPATH/system/etc/menuparam.s. If file extensions are permitted, they typically will not be automatically deleted by the maintenance process *carsweekly*.

### Time

The time of day to execute the process. To execute immediately, enter NOW in the field.

### Day

The day of the week to execute the process. This field is not active when you designate a start time of NOW.

### Background

An indicator designating whether you want to run the process in the background (so you can perform other work while it is running). If you use a file option such as *more*, *screen*, or *viewer*, you cannot use the background feature.

## How to Run a Background Process

Follow these steps to run a process in the background.

1. When the parameter screen appears on your PC, enter the parameters the system requires to complete the process, and then select **Finish**. The Output Parameters and Scheduling window appears.
2. Does the process create output that you can view (e.g., a report)?
  - If yes, go to step 3. The cursor appears in the Mode field.
  - If no, go to step 5. The cursor appears in the Time field.
3. Do you want to save the output in a file, or route it to a printer?
  - If you want to use a file, enter **file**, then go to step 4. The cursor moves to the File field.
  - If you want to use a printer, enter the name of the printer, then go to step 5. The cursor moves to the Time field.

**Note** On the Output Parameters and Scheduling window, you also have the option of displaying the output on your screen by entering **more** in the Mode field. However, if you want a screen display, you cannot execute the process in the background.

4. Enter a name for the file, or leave the name field blank if you want to use the default. The cursor moves to the Time field.

**Note** The system automatically adds a .out extension to the file name that you enter in this field. Every program that produces output has a designated default output file name. In most cases, the default file name resembles the name of the program, and contains the extension *.out*.

5. Do you want to start the process now?
  - If yes, enter NOW in the Time field and go to step 6. The cursor moves to the Background field.
  - If no, you are not performing a task in the background, but are scheduling a process for later execution. Enter the time you want the process to start. For more information about scheduling processes, see Scheduling Processes in this section.
6. Enter **y** in the background field, then select **Finish**.

**Note** You can select other menu options to complete other work while the process executes in the background; the system sends you electronic mail after the task completes.

## Scheduling Processes

When you schedule processes, you control the time when the process executes. The standard default for all process execution is 11:00 p.m., but your institution



can change the default, or you can override it if desired. Scheduling processes makes the most efficient use of your computer and speeds the response time for the tasks that you must complete. Consider scheduling processes for those activities that take a long time to run.

## Using the Output Parameters and Scheduling Window

When you have the ability to schedule a task for later execution (e.g., you have provided all the information the program needs to complete), the system displays the Output Parameters and Scheduling window. This is the same pop-up window that you use to execute processes in the background (for more information, see *Performing Background Tasks* in this section).

## How to Schedule a Process for Later Execution

Follow these steps to schedule a process for later execution.

1. When the parameter screen appears on your monitor, enter the parameters that the system requires to complete the process, and then select **Finish**. The Output Parameters and Scheduling window appears.
2. Does the process create output that you can view (e.g., a report)?
  - If yes, go to step 3. The cursor appears in the Mode field.
  - If no, go to step 5. The cursor appears in the Time field
3. Do you want to save the output in a file, or route it to a printer?
  - If you want to use a file, enter **file**, and then go to step 4. The cursor moves to the File field.
  - If you want to use a printer, enter the name of the printer, and then go to step 5. The cursor moves to the Time field.

**Note** On the Output Parameters and Scheduling window, you also have the option of displaying the output on your screen by entering more in the Mode field. However, if you want a screen display, you cannot schedule the process for later execution.

4. Enter a name for the file, or leave the name field blank if you want to use the default. The cursor moves to the Time field.

**Note** The system automatically adds an .out extension to the file name that you enter in this field. Every program that produces output has a designated default output file name. In most cases, the default file name resembles the name of the program, and contains the extension .out.

5. Enter the time of day that you want to run the process. The cursor moves to the Day field.
6. Enter one of the following, then select **Finish**:
  - The week day on which you want the process to run, (e.g., Tuesday)
  - The date on which you want the process to run, (e.g., Feb 1)
  - The numeric date on which you want the process to run, (e.g., 11302010)

**Note** Leave the field blank if you want the process to complete on the current date.

At this point in the process, the menu from which you selected the process appears.

You can select other menu options to complete other work while the process awaits execution at the scheduled time.

The system sends you electronic mail after the task completes.

---

## Suspending Tasks

You may sometimes need to go to a specific program or process while using another program. For example, you may need to look up an ID number for a colleague while you are entering another type of information.

When you do not want to completely exit from a task, and you need to go to another process, you can suspend the task.

**Note** If you suspend a task when you are using a specific record (e.g., a student's ID record), the record remains locked for your use only until you re-access the task and execute your changes to the record. To ensure that you do not lock records while suspending tasks, Jenzabar recommends that you suspend tasks only when the process you are using is in Query mode.

### How to Suspend a Task

To suspend a process, simply minimize the window by clicking on the orange "Minimize" icon to the left of the screen title.

### Viewing Your Suspended Tasks

You can re-access a process that you previously suspended in one of two ways:

- Double-click on the icon for the minimized window, which is located at the bottom left-hand side of the main Jenzabar CX window.
- Click on **Windows** on the main Jenzabar CX menu and select the desired process from the list.

### Aborting a Suspended or Background Task

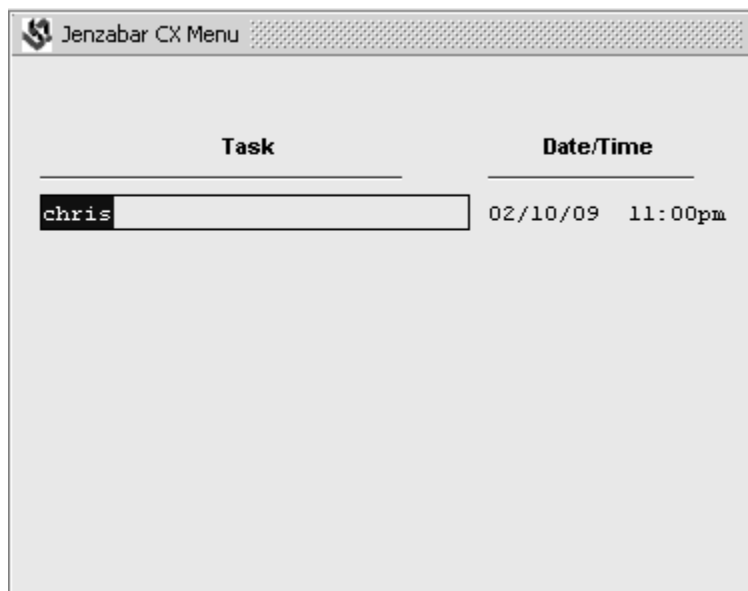
To abort a suspended task, access the suspended task as described above and exit using normal procedures.

## Aborting Scheduled Processes

Occasionally, you may want to schedule a process for later execution and then decide that you do not want the process to execute as scheduled. When this situation occurs, you can use the Scheduled Procedure window to abort the process.

### Scheduled Procedure Window

You use the following Scheduled Procedure window to view a previously scheduled task. The Scheduled Procedure window lists all the processes that you have scheduled (if you use the system default you can schedule up to nine processes at a time).



### How to Abort a Scheduled Process

Follow these steps to abort processes that you have scheduled for later execution.

1. Select **Tools > Scheduled Processes** from the main menu. The Scheduled Process window appears.
2. Select **Options**, and then select **Remove**. The system displays the message, "Do you really want to remove <program name>?"
3. Select **Yes**. The system displays the following message: "<Enter> to continue"
4. Press <Enter>. The Scheduled Process window disappears.

## Viewing Parameters for a Scheduled Process

Do the following to view the parameters for a scheduled process.

1. Select **Tools > Scheduled Processes** from the main menu. The Scheduled Process window appears.
2. Select **Options** from the Scheduled Process window.
3. Select **Process** and Click **OK**. A dialog box displays the report and script to be run and the parameters that will be used at runtime.



# File Management

---

This section provides information and step-by-step procedures for you to follow when you view and organize the files in your home directory.

---

## Before You Begin

Before you begin to use the following procedures for viewing and organizing the files in your home directory, remember the following:

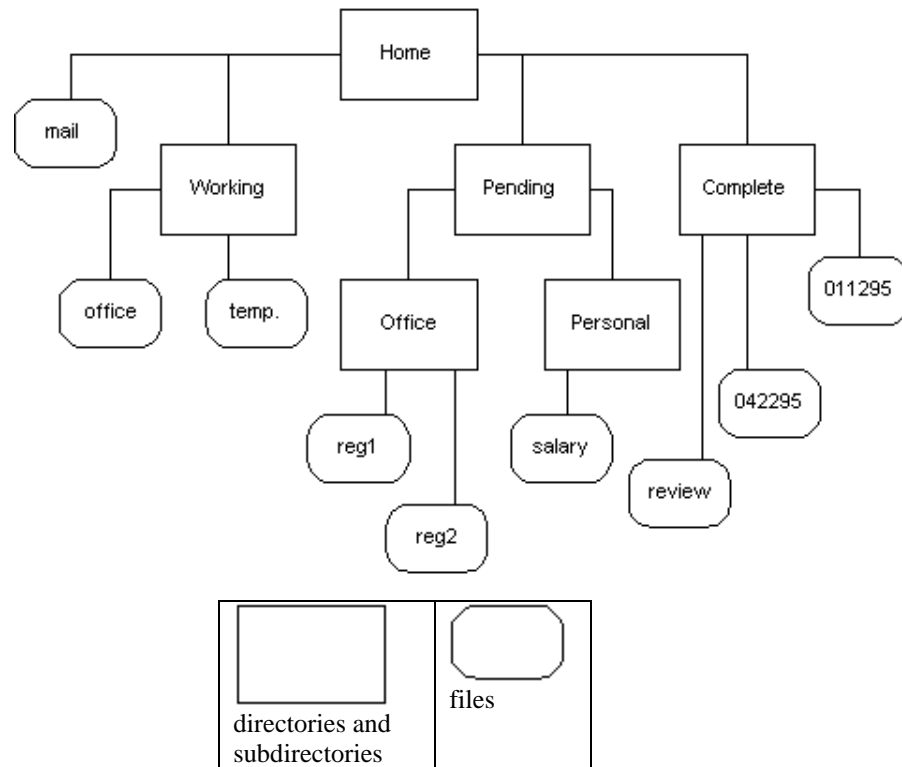
- Every system user has a home directory.
- By default, all the file handling options on the Utility menu relate to your home directory. You must know the path name for other directories.
- Home directories for menu users contain files from the following sources:
  - Saved mail messages
  - Files that you create for your own purposes
  - Output from various Jenzabar CX processes

## Directory Structure

---

Jenzabar created CX with an organized directory and subdirectory structure. Directories and subdirectories do not contain information; instead they contain files that contain information.

The following diagram illustrates how you might organize your directory structure:



## Viewing a List of Your Files

You can view a list of your files in several different ways. The following lists the ways you can list your files. To access these options, choose **Utility Menu > File Options** from the menu.

### List Names of Files

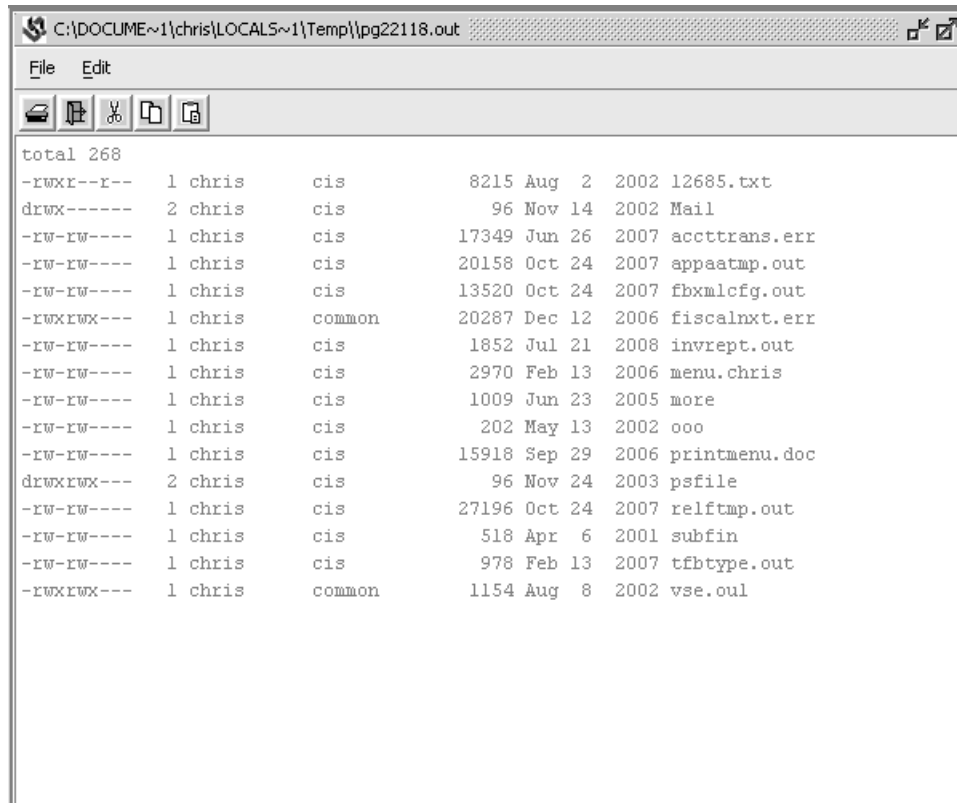
Lists file information on filenames only, in alphabetical order.

### List Files in Long Format

Lists the following information about your files.

- Filenames
- File permissions
- File owner
- Size of file
- Date and time created

An example of the output follows:



```

total 268
-rwxr--r--  1 chris    cis           8215 Aug  2  2002 12685.txt
drwx-----  2 chris    cis             96 Nov 14  2002 Mail
-rw-rw----  1 chris    cis        17349 Jun 26  2007 accttrans.err
-rw-rw----  1 chris    cis       20158 Oct 24  2007 appaatmp.out
-rw-rw----  1 chris    cis       13520 Oct 24  2007 fbxmlcfg.out
-rwxrwx---  1 chris    common    20287 Dec 12  2006 fiscalnxt.err
-rw-rw----  1 chris    cis        1852 Jul 21  2008 invrept.out
-rw-rw----  1 chris    cis        2970 Feb 13  2006 menu.chris
-rw-rw----  1 chris    cis         1009 Jun 23  2005 more
-rw-rw----  1 chris    cis          202 May 13  2002 ooo
-rw-rw----  1 chris    cis       15918 Sep 29  2006 printmenu.doc
drwxrwx---  2 chris    cis             96 Nov 24  2003 psfile
-rw-rw----  1 chris    cis       27196 Oct 24  2007 relftmp.out
-rw-rw----  1 chris    cis          518 Apr  6  2001 subfin
-rw-rw----  1 chris    cis          978 Feb 13  2007 tfbtype.out
-rwxrwx---  1 chris    common     1154 Aug  8  2002 vse.oul

```

### List Files in Time Order

This allows you to view the following file information in order of creation.

- Filenames
- File permissions
- File owner
- Size of file
- Date and time created

An example of the output follows:

```

total 268
-rw-rw---- 1 chris  cis      1852 Jul 21  2008 invrept.out
-rw-rw---- 1 chris  cis     27196 Oct 24  2007 relftmp.out
-rw-rw---- 1 chris  cis     20158 Oct 24  2007 appaatmp.out
-rw-rw---- 1 chris  cis    13520 Oct 24  2007 fbxmlcfg.out
-rw-rw---- 1 chris  cis    17349 Jun 26  2007 accttrans.err
-rw-rw---- 1 chris  cis      978 Feb 13  2007 tfbtype.out
-rwxrwx--- 1 chris  common 20287 Dec 12  2006 fiscalnxt.err
-rw-rw---- 1 chris  cis    15918 Sep 29  2006 printmenu.doc
-rw-rw---- 1 chris  cis     2970 Feb 13  2006 menu.chris
-rw-rw---- 1 chris  cis     1009 Jun 23  2005 more
drwxrwx--- 2 chris  cis       96 Nov 24  2003 psfile
drwx----- 2 chris  cis       96 Nov 14  2002 Mail
-rwxrwx--- 1 chris  common  1154 Aug  8  2002 vse.oul
-rwxr--r-- 1 chris  cis     8215 Aug  2  2002 l2685.txt
-rw-rw---- 1 chris  cis       202 May 13  2002 ooo
-rw-rw---- 1 chris  cis       518 Apr  6  2001 subfin

```

## How to Use the File Listing Options

When you want to view a list of your files, you must provide the system with the following information:

- The directory path for the filenames that you want to view.
- The printer to which you want to route the list. The default is to route the list to your screen display, using the **more** command.

## Managing Your Files

Using the menu, you can perform a variety of maintenance tasks with the files in your directories and subdirectories.

## File Maintenance Options

The following options on the **Utility Menu > File Options** navigation tree enable you to maintain the files in your directories and subdirectories. Note that the following table includes the information you must supply to perform each task.



Use this option ...	to complete this task ...	by entering this information ...
Display File to Screen	Display the contents of the file on your screen	The filename
Print File	Produce a hard copy of a file	The name of the printer. You can define the valid list of printers by using the (Q) Printer Lists option on the menu. The number of copies to print The name of the form that you want to use to print the file The filename
Change Name of File	Rename a file	The old filename The new filename
Copy File to Another File	Create a duplicate of a file	The original filename The filename for the copy
Search Files for String	Search files for specified words or phrases	The words or phrases you want to locate The filename(s) you want to search The location to which you want to route the output (enter more to display the list on the screen, or the name of the printer you want to use)
Remove a File	Delete a file	The filename
Download a File	Transmit a file from Jenzabar CX to a PC Your Jenzabar coordinator must set up permissions for you to download a file.	The filename
Count Words in a File	Review the following information about a file: – Number of lines – Number of words – Number of characters – Filename The system displays this information on a single line, as in the following example: 3 16 102 test (The first three numbers indicate numbers of lines, letters, and words. The last word is the filename, in this case, “test”)	The filename



# Locating and Entering Data

---

Jenzabar provides a variety of programs you can use to locate and enter data into the system. The primary types of information you may need to enter are as follows:

- Information about individuals
- Information about courses
- Information about financial transactions

Individuals can include prospects, applicants, students, institutions, churches, vendors, employees, parents, and constituents. The most basic name and address information about individuals appears in the ID record, although a variety of demographic, academic, and historical information can be stored in related records to provide a complete electronic trail of the individual's interactions with your institution.

Course setup is accomplished through the Course/Class Schedule option in the Registration portion of the navigation tree.

Financial transactions arise automatically from a variety of processes, including Accounts Payable, Payroll, Student Billing, Donor Accounting, and Fixed Assets. The Controller's office at your institution can also initiate financial transactions and adjustments.

Because of its specialized nature and the permissions required, entering financial data is beyond the scope of this guide. However, since similarities exist in all the entry programs for individuals (e.g., ID Entry, Admissions Entry, Student Entry, Vendor Entry, and Constituent Entry), this section contains the procedures you need to use to view existing records on your database and to add new records.

---

## About the ID Record

### Introduction

The ID record stores the most basic type of data in your system. Such records become part of database in two primary ways: from other automated sources through an interface or conversion process, and from the manual data entry process. Although several data entry programs exist within the system, all the entry programs require that you perform similar procedures.

### Supplemental Information

Even though the ID record contains the most basic information about an individual, supplemental information about these entities exists in other related records. For example, a School record supplies information about a school's CEEB number, college fair date, public/private status, and enrollment; a Profile record contains data about a person's birthdate, birthplace, religion, and ethnic origin. The system connects the related records to the ID record with the ID

number, a system-generated number that appears in the top left corner of every standard ID entry screen.

---

## Before You Begin

Before you begin to use the following procedures for viewing, adding, and updating ID information, remember:

- An ID record must exist for every individual you want to use for reporting from the database.
- Entry programs access and add not only ID record information, but also the supporting records that contain demographic or historical data.
- Individuals whom you identify as leads can be an exception to this rule, because of the volume of leads and the likelihood that the leads will not become active prospects or applicants.
- Check with your Jenzabar coordinator regarding your institution's policies and permissions for adding or updating ID records.
- You can refer to Jenzabar's user guides for specific instructions for completing more complex program screens.

---

## Process

The following list shows the general phases that take place before, during, and after viewing, adding and updating ID information.

**Note** The following process (and the procedures in this section) assume that you are using the ID Entry program. The process and procedures are similar for all other entry programs.

1. Gather all the information about the person or other entity for whom you want to add an ID.
2. Access the entry program.
3. Perform a query to ensure that the entity does not already have an existing ID record on your system, or to view information that already exists on your database for the entity.
4. If no ID record exists, enter all the available information about the entity, and save the information you enter. The system automatically updates and maintains the appropriate records for the entity.
5. If an ID record exists and you want to change the information in the record, enter the changes, and save the information you enter. The system automatically updates and maintains the appropriate records for the entity.

---

## Treatment of Names and Social Security Numbers

Among the basic information stored in the ID record are the primary name of the individual or entity, and the Social Security number of individuals. The counterpart of the Social Security number for businesses or other entities, the federal ID number, is also stored in the ID record. Because names can be

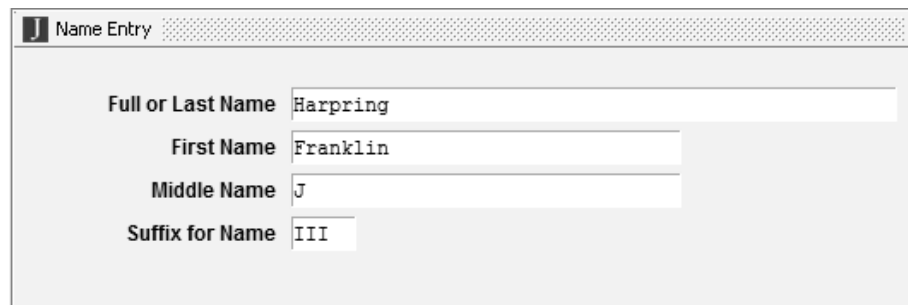
complex and can relate to either persons or organizations, and because Social Security numbers are sensitive information that should be protected from unauthorized viewing and use, these two elements of the ID record require special treatment.

## Names

On both ID entry screens and ID query screens, a single name field appears, containing a person's name in the format Last Name, First Name Middle,, Name (or personal) Suffix. In the case of a business, the typical format is Name, Extension, where the Extension is a further description of the business (e.g., Inc. or L.L.C.). In the ID record, however, the name is stored in up to five different fields: fullname, lastname, firstname, middlename, and suffixname, as follows:

- The fullname field contains the name formatted in the traditional way: Last, First Middle,, Name Suffix.
- The lastname field contains an individual's last name or an entity's entire name, punctuated as needed (e.g., Smith-Hayes or Bill's Auto Shop, Inc.).
- The firstname field contains an individual's first name, formatted as desired (e.g., Emily, Mary Beth, Abdul Hakeem, or Cheng-Yih). The field is not used for businesses or other entities.
- The middlename field contains an individual's middle name or middle initial, formatted as desired. The field is not used for businesses or other entities. Note that some programs truncate or abbreviate the middle name to shorten the total length of the name.
- The suffixname field contains a clarifier of the person's name and can be considered a personal suffix (as opposed to the professional, and separate, Suffix field on the screen and in the ID record, which contains designations such as M.D. or Ph. D.). The field is not used for businesses or other entities.

The Name Entry window where all names are entered only enables you to enter the four separate components of the name; the system maintains the fullname field, so users never directly change the fullname field. An example of the Name Entry window follows:



The screenshot shows a window titled "Name Entry". Inside, there are four labeled input fields arranged vertically. The first field is labeled "Full or Last Name" and contains the text "Harpring". The second field is labeled "First Name" and contains "Franklin". The third field is labeled "Middle Name" and contains "J". The fourth field is labeled "Suffix for Name" and contains "III".

The storage of names in the database is important to users because it affects how ID searches work. For example, on the ID Query screen, you can enter some or all of the fullname, or some or all of the four separate fields that the system formats into the fullname field. Therefore, if you are querying for the person in the example Name Entry window shown above, any of the following options would return the desired ID (as well as many other possibilities):

Screen label	Entry
Name	Harpring, Franklin J., III
Full or Last Name	Harpring
Full or Last Name	Harpr*
First Name	Franklin*

## Spaces in Names

The issue of spaces in the First Name or Middle Name fields provides a special consideration, particularly for querying. When a First Name field contains a name with a space (e.g., Mary Beth), the name is stored in the firstname field in the ID record as Mary Beth. However, when the system creates the fullname field from the various name elements, it creates a first name of Mary\_Beth. Therefore, if a user queries for a name using the Name field, it should be entered as Smith, Mary\_Beth\*. Alternatively, a query with a Full or Last Name of Smith and a first name of Mary Beth will result in the location of the correct ID.

## Social Security Numbers

Social Security numbers can be masked or unmasked on data entry screens, and even if they are masked for some users, a setup option in the Permissions table can enable other users to view the numbers as unmasked values. The masking (created by a substitution of Xs for the first five digits of the number) is controlled by the way the user formats the digits being entered.

In most entry programs, the insertion of a hyphen/dash in the fourth and seventh positions causes the system to automatically mask the display of all but the last four digits of the number. Therefore, when a user types 123-45-6789 into the SSN field on an entry screen, the system automatically displays it as XXX-XX-6789. After the Social Security number has been formatted in this fashion, it can only be changed by a user with appropriate permissions.

Alternatively, if a user enters an incorrect Social Security number and realizes the error before the entered data is saved, it is possible to cancel out of the data entry process and re-enter the correct number.

Alternatively, if the user types 123456789 into the SSN field on the entry screen, it will remain as entered; the system does not interpret it as a Social Security number. Similarly, federal identification numbers (sometimes called employer ID numbers) are not masked because they do not have the specific formatting that is unique to Social Security numbers.

When you use the Social Security number as search criteria, you can enter an asterisk as a wildcard; you can also enter the exact Social Security number formatted as it was entered. For example, the following searches will yield the correct result:

Value entered on entry screen	Value entered in query
123456789	*678*
123-45-6789	*6789
123-45-6789 (note that this value will appear on the screen as XXX-)	123-45-6789

Value entered on entry screen	Value entered in query
XX-6789)	

The following values will yield an incorrect result:

Value entered on entry screen	Value entered in query
123456789	*678
123-45-6789	XXX-XX-6789 (even though this is the way the number appears on the screen)

## Programs with Automatic Masking

Several CX entry programs provide for masking automatically, even if the dashes/hyphens are not typed into the field at the time the ID is added or updated. This is because the programs automatically insert the correct formatting (that is, the hyphens in the fourth and seventh positions in the field), and then the masking occurs based on the formatting. The programs are:

- Admissions Entry (admentry)
- Event Entry (evntentry)
- Matriculation Entry (mentry)
- Matriculation ID Entry (mtidentry)
- Student Entry (stuentry)

In other words, in each of these programs, if a user enters 123456789 into the Social Security number field, the system automatically converts the contents of the field to 123-45-6789 and then masks the value as XXX-XX-6789.

---

## ID Entry and Query Screens

When you enter or query ID information, you use program screens, specifically called form screens. Form screens are electronic representations of paper forms that contain name and address information. Your institution can customize these form screens to match the paper forms that you use for data entry.

### ID Entry Screen Example

Following is an example of a completed ID Entry screen in the standard system. Remember that your entry screen can differ, based on the customizations at your institution. The commands appear at the top of the screen, and access to the detail windows is available from a dropdown list at the top right.

**Note** This example screen shows the maximum address field lengths as allowed within CX. Your field lengths may vary.

**ID Data Entry - Individual Form**

File Edit Commands Help

Go to...

Go to...

Address runcodes

Contacts

First relation

second Relation

Other address

other Name

ID No 20240 SS No XXX-XX-3333 Add Date

Title MR Mr. Last Upd 03/01/2006

Last Name Harris

First Name Jamie Birthdate 01/23/1962

Middle Name S. Birthplace Indianapolis IN

Personal Suffix Suffix

Address 900 Hill Ave

City La Grange

State/Zip IL 60188 Country USA Res: Country/St/Cty USA IL HAMI

Telephone Correct Address Y Alt Addr Code PERM

Deceased N Date Sex M Marital S

Race AS Hispanic Ethnic AS

Prev ID 0

Privacy ADDR Name and Address Info

Occupation BICR Butcher

Denomination CH Christian

Display Mode

## ID Entry Screen Modes

Screens and programs change modes as the type of processing changes. For example, in many cases, the first step you must perform is to locate an ID number, so the screen appears in Query mode. After you locate the ID (or determine that the ID does not exist on your database), the screen changes to Display mode, from which you can select Update mode (in which you can change the selected record) or Insert mode (in which you can add a new record). When you complete your data entry, you execute the program, saving your work, and the screen mode changes to reflect the program execution.

In more detail, the modes are as follows.

### Add

The mode that allows you to add a new record to the database. You should always perform a query to ensure that the record you want to add is not already in your database. If the system cannot find the record, you can enter that record in Add mode. Note that some screens also include Insert mode; it provides the same capabilities as Add mode.

### Auto-mode

The mode that automatically accesses Query mode for you to select a record, then automatically switches to Update mode so you can update the record.

### Display

The mode for an employee who is not authorized to add or update information, but is authorized to access and view information. In addition, entry screens appear in Display mode before you select the commands that change the mode. Display mode is sometimes referred to as View-only mode.

**Query**

The mode that allows you to search for and select a record from the database. You select **Query** or **Auto-mode** to access this mode.

**Update**

The mode that allows you to update a record that already exists on the database. You select a record from the database using Auto-mode or Query, or select Update after using Query to select a record from the database.

## ID Entry Screen Commands

As the screen mode changes, the commands also change to provide the tools you need to work in the current mode. For example, you use different commands in Query mode than you use in Update mode.

The screen example in this section displays the commands you can use in Display mode. The following is a list of the descriptions of all the commands that can appear on an entry screen, regardless of the mode in which the screen operates.

**Auto-mode**

Displays the query screen in Query mode, and then automatically enters Update mode.

**Cancel**

Allows you to do any of the following without saving the information you have entered:

- Return to the previous command line
- Return to the previous window

**Detail window (Scroll)**

Displays the detail window types associated with the program screen.

**Exit**

Ends processing in the program you are using, and displays the menu from which you accessed the program.

**Find ID**

Displays the query screen so you can enter search criteria for the record you want to locate.

**Finish**

Allows you to add and save information to the database once you have completed your data entry. In non-entry type programs, this command also executes processes.

**ID-type**

Displays a view-only window containing information about an individual or organization associated with your institution. The window contains a variety of logical Y(es)/N(o) fields; the values vary, depending on the types of records that exist on your database for the selected ID.

**Example:** If the student has a Student Enrollment record, the field for Student contains a “Y”; if you use the Vendor Entry program to enter the ID record, the field for Business contains a “Y”.

**Insert**

Allows you to add a new record to the database.



**Menu**

Displays a list of forms from which you can select the type of data entry you want to perform, (e.g., applicant, school, or church).

**Next**

Allows you to move to the next consecutive screens when an entry screen contains multiple screens, or move between consecutive options that have multiple screens for display.

**Query**

Displays the Name/Social Security Number Query screen that you use to locate the ID record of a specific person.

**Select**

Locks the displayed record so you can view or update it.

## Types of Fields on CX Screens

The fields that appear on program screens contain data elements for the Jenzabar CX records and tables. The following four types of fields can appear on the screens:

**Default field**

Information appears automatically in a default field. Unless the field is also a display-only field (which you cannot change), you can take the following actions when the cursor is in a default field:

- Accept the default value by
  - Advancing to the next field using the <Tab> key.
  - Clicking in another field.
- Enter an alternate choice to override the default value.

**Display-only field**

The cursor does not move into a display-only field. As a result, you cannot make changes to information in this field.

**Optional entry field**

Entry of information into this field is optional. You can take the following actions when the cursor is in an optional entry field:

- Enter information into the field
- Move the cursor through the field and leave it blank

**Note** To move the cursor, use the <Tab> key.

- Click in another field and leave the field blank

**Required entry field**

You are required to enter information into this field. You cannot save your entries until you make an entry in the field.

## Fields on the ID Entry Screen

The following fields appear on the ID Entry screen. Remember that you can customize this screen to contain the fields that your institution uses and to present the fields in the order on which they appear on your data entry forms.

**Note** You can use table lookup to assist you in completing the fields whenever a down arrow appears on a button to the immediate right of the field. The arrow button appears only when the entry program is in Update or Insert mode. For more information about table lookup, see *Using Table Lookup* in this section.

**Add date**

The system-maintained date on which your institution added the ID record to the system.

**Address**

The number and street address of the entity.

**Address code**

A four-character code that indicates the type of address that appears on the ID record, [e.g., LOC (local), SUMR (summer), PERM (permanent)].

**City**

The city of residence of the entity.

**Correct address**

A Y(es)/N(o) field that indicates whether the address on the record is correct. If desired, you can configure your system to prompt you to change this value from N to Y when you enter a new address, since it is likely the new address is correct, even if the prior address was incorrect.

**Country**

The country of residence of the entity.

**Date (deceased)**

The date on which the individual died.

**Deceased**

A Y(es)/N(o) field that indicates whether the individual is deceased.

**ID No.**

The system-generated number that uniquely identifies the ID record and the entity.

**Last updated**

The system-maintained date on which your institution last updated the ID record.

**Name**

The full name of the entity. For a person, the format is:

Lastname, Firstname Middle., Name Suffix

**Example:** Jones, David J., Jr.; Brown, Melissa R.; Adkins, Thomas

**Note** You cannot directly edit the Name field. It is comprised of four separate database fields that are automatically formatted as required for the standard CX processes (including queries, reporting, and letter writing). When the entry program is in Edit/Update mode or Insert/Add mode and you place your cursor in the Name field, the system displays a Name Entry window where you can edit the elements of the name as needed. For more information, see *Treatment of Names and Social Security Numbers* in this section.

**SS No.**

The individual's Social Security number, or the federal ID or employer ID number for a business or other entity. Masking may or may not be used on this field; for more information, see *Treatment of Names and Social Security Numbers* in this section.

**State/ZIP**

The two-character state code, and the ZIP code of residence of the entity.

**Suffix**

The title suffix for the entity, (e.g., M.D., D.D.S., Esq.).

**Telephone**

The area code and telephone number of the entity.

**Title**

The entity's title, (e.g., MR, MS, HON.).

## Query Screen

The Query screen enables you to enter search criteria about an individual or entity for which your institution maintains an ID record. The screen contains some of the most basic information that appears on the ID Entry screen. Regardless of the program or application from which you initiate a query, this screen appears.

Most of the fields on the Query screen are identical to the fields on the ID Entry screen. However, for ID entry purposes, the four separate fields that comprise the Name only appear in a Name Entry pop-up window. Those four fields are shown on the Query screen so they can be used individually or collectively to retrieve an appropriate ID. The fields are as follows.

**Full or Last Name**

Either the last name of the individual or the entire name of the entity if it is not a person (e.g., a school or business).

**First Name**

The first name of the person.

**Middle Name**

The middle name of the person.

**Suffix for Name**

A qualifier or clarification, if any, for the person's name; sometimes considered a personal suffix. Examples of suffixes for names are Jr., Sr., or III. Note that a suffix for name is not the same as a suffix; the suffix is typically a professional designation, as described above.

For more information about the name fields, see *Treatment of Names and Social Security Numbers* in this section

The screenshot shows a window titled "ID Data Entry - ID Query". The window has a menu bar with "File", "Edit", "Commands", and "Help". Below the menu bar is a toolbar with icons for a checkmark, a close button, a search icon, a document icon, and a help icon. The main area of the window contains a form with the following fields:

ID No	5721	SS No	XXX-XX-4878	Add Date	
Name	Bradford, Aubrey James,, III			Title	MR
Address	100 Apache Drive			Telephone	6064736170
City	Owensboro				
State/Zip	KY	42301			
Country	USA				
Full or Last Name	Bradford				
First Name	Aubrey				
Middle Name	James				
Suffix For Name	III				

At the bottom of the window is a status bar with the text "ID INFORMATION".

## Query Screen Commands

The following commands are available on the Query screen. You can access the commands in any of the following ways:

- Clicking on the icons
- Selecting **Commands** from the menu line and then clicking on the desired command in the list of commands that appears
- Selecting **Commands** from the menu line and pressing the corresponding key(s) on your keyboard

### Cancel

Allows you to do any of the following without saving the information you have entered:

- Back out of the current command
- Return to the previous command line
- Return to the previous window

### Finished

Communicates to the system that you have completed your data entry or selection.

### Help

Displays help about phonetic searches, and the screen, commands and keystrokes.

**ID type**

Displays a view-only window containing information about an individual or organization associated with your institution. The window contains a variety of logical Y(es)/N(o) fields; the values in the fields vary, depending on the types of records that exist in the system for the selected ID.

**Example:** If the student has a Student Enrollment record, the field for Student contains a “Y”. If you use the Vendor Entry program to enter the ID record, the field for Business contains a “Y”.

**List IDs**

In Display mode, displays the name list from which you selected the ID record that appears on the screen.

**Parameters**

In Query mode, displays the ID Query Parameters window. This window controls the extent of the search that the system performs in response to your query. Fields on the ID Query Parameters window are as follows:

- Similar matching: Enter Y to execute a search that is case-insensitive and which ignores spaces and punctuation and a repeated letter (a common misspelling). For example, if you enter McDonald, the system will retrieve MacDonald, McDonald, Mac Donald and Mac donald. Similarly, if you enter Smith, Johny, the system will locate Smith, Johnny.
- Phonetic matching: Enter Y to conduct a Soundex search that locates IDs for names that are similar to the name that you enter, (e.g., if you enter Smith, John, the system will locate the record for Smythe, Jon).
- ID Record Names: Enter Y to search the ID records for the name that you enter.
- Alternate Names: Enter Y to search other name-related records on the system for the name that you enter, (e.g., the Addressee record that contains maiden names or nicknames).
- Alternate Name Style: Enables you to specify the type of alternate name search you want to use. Valid codes are (F)ormal, (I)nformal, (M)atriculation, (N)ickname, (P)revious, or blank (for all).

**Previous**

In Display mode, fills the Query screen with the search criteria you used for the previous query.

**Query IDs**

In Display mode, displays the empty Query screen so you can enter more or different query search criteria.

## Performing a Query

**How to Locate an ID**

When you perform a query for an ID record, you use the Find ID command. Follow these steps to complete a query, using Find ID.

1. Access an entry screen.
2. Select **Query**. The Entry screen enters Query mode.
3. Do you know the ID number or Social Security number?

- If yes, enter the number in the appropriate field, and go to step 10.
  - If no, go to step 4.
4. Select **Find ID**. The ID Query screen appears.
5. Do you want the system to search by Social Security number or by name?
- If by Social Security number, go to step 6.
  - If by name, do the following :
    - Position your cursor in any of the name fields. You can conduct a search on the entire name using a format of :  
Lastname, Firstname Middle.,Name Suffix  
  
Alternatively, you can use the four fields in the lower portion of the screen to search specific components of the name (e.g., First Name or Middle Name).
      - ° You can use the asterisk (\*) wildcard character with any of the name fields to query on various versions of names and nicknames. For example, enter Doe, J\* in the Name fields to return all the individuals with a first initial of J, and a last name of Doe. Alternatively, you could enter Brown\* in the Full or Last Name field and Ca\* in the First Name field to return names such as Calvin James Browning, Carol Brown, or Catherine Elizabeth Brown. For more information about name searches, see *Treatment of Names and Social Security Numbers* in this section.
      - ° You can also enter other information that you know about the individual (e.g., the city or state of the address).
    - Go to step 8.
6. To search by Social Security number, do the following:
- Move the cursor to the SS No field.
  - Type the Social Security number using this format: 999-99-9999 (for example, 123-54-5667). Even if the Social Security number is masked (that is, it appears with Xs instead of numeric values for the first five digits in the number), you must enter the actual number (or a number with wildcards, such as \*5667) for a Social Security number search to work. For more information, see *Treatment of Names and Social Security Numbers* in this section.
  - Select **Finished**. Note that any of the query fields left blank are ignored for the purpose of the search.
    - If the system locates the record for the Social Security number that you enter, it displays the information in the record on the ID Query screen.
    - If the system does not locate the record for the Social Security number that you enter, it displays the message, "There are no records satisfying the conditions."
7. Did the system locate the record for the Social Security number that you entered?

- If yes, review the information on the screen as desired, and then exit from the program or complete other queries.
  - If no, go to step 5.
8. Do you want to specify the type of name search the system uses?
- If yes, do the following:
    - Select **Parameters**. The ID Query Parameters window appears.
    - Go to step 9.
  - If no, select **Finished**, then go to step 10.
9. Enter the appropriate codes in the fields, select **Finished** twice, then go to step 10.
10. Did the search find more than one ID record that meets your search criteria?
- If yes, a list of names appears. Go to step 11.

**Note** The name list contains the following information:

- Match code: Indicates if the record exactly matches your search criteria (I), or if it matches based on a phonetic search (IP).

- Number: Provides a means of selecting the record.

- Name, City, State, ZIP: Contain the name and address information in the located record.

- If no, go to step 12. The ID Query screen displays the information in the record.

11. Do you see the name you are searching for on the window?

**Note** Select **Forward** to view more names.

- If yes, do the following:
    - Type the number corresponding to the name, and press <Enter>.
    - Go to step 12.
  - If no, select **Cancel** twice and go to step 5.
12. Does the information on the ID Query screen correspond to the individual for whom you are searching?
- If yes, select **Finished**.
  - If no, do the following:
    - Select **Find ID**.
    - Select **Cancel** twice.
    - Go to step 5.

## Adding an ID Record

### Querying First

When you add an ID record for an individual, the system creates a unique ID number to identify the record. All other records that the system maintains for the individual also will contain this unique ID number. For this reason, Jenzabar

emphasizes that you should always perform a query for an individual before you add an ID. If you add an ID for an individual who already has an ID record on the database, you create processing complications.

**Note** If you inadvertently create a duplicate ID record, contact your Jenzabar coordinator as soon as you discover the duplication. A Merge ID process is available to combine the ID information into a single ID, but it is a complex process and it is always better to not need to use it. You can also combine records manually to make sure all information is stored in your database as accurately as possible. To help you identify duplicated information in your database, the Jenzabar coordinator can use a process called *dupid*.

### How to Add an ID Record

The following process shows how to add an ID record. It includes a summarized version of the procedure to complete a query before you add a record, to ensure against your adding a duplicate ID. For more detailed information about the options available when you perform a query, see *How to locate an ID* in this section.

1. Access the entry screen.
2. Select **Query**.
3. Select **Find ID**.
4. Enter search criteria, and then select **Finished**, setting parameters for the search if desired.
5. Search the name list for the name you intend to enter; select **Cancel** when you complete your search.
6. Select **Cancel** again to exit from Query mode.
7. Select **Insert**.
8. Enter all the information about the person or entity, and then select **Finished** when you are done. Note that when you place your cursor in the Name field, the system displays the Name Entry window into which you enter the elements of the name. When you save the name information by clicking **Accept**, the system places the various name elements into the Name field in the format Last, First Middle.,,Name Suffix. For more information, see *Treatment of Names and Social Security Numbers* in this section.

**Note** Before you finish your data entry, you can select **Detail** to display a list of the detail records that can relate to an ID, (e.g., Accomplishments, Relationships, Interests, and Alternate Names and Addresses). Some of the scroll records are view-only (i.e., you cannot enter information); however, many of the records enable you to enter additional information about the person or entity.

If your institution uses QAS address verification software (a third party software package that integrates with CX), a message will appear when you save address information. Messages vary depending on QAS's success in matching the address you have entered. For more information, see *Address Verification using QAS Software* in this section.

### CAUTION

You must select **Finished** twice (once in the detail window, and again in the entry screen) to save a detail record. The system saves detail records temporarily until you select **Finished** in the entry screen. If you do not select **Finished** in the entry screen, the system does not save the detail records.



## Updating an ID Record

### How to Update a Record on an Entry Screen

You can use the previous procedure to update an existing record. During your query, select the record, then select **Update**, making changes as required. Select **Finished** when you have completed your changes.

### Helpful Hints to Completing Fields

The following are some additional guidelines to help you enter information in fields:

- When the data you type in a field completely fills the space allowed, the cursor often automatically moves to the next entry field; you do not need to advance the cursor yourself.
- If the data you type in a field does not completely fill the field, advance the cursor to the next entry field by pressing <Tab> or clicking the mouse.
- For fields that require all uppercase letters, the system automatically capitalizes such letters. You do not need to use the <Shift> key to capitalize them.
- When you change the name of the person or entity, note the following:
  - You cannot directly edit the Name field. The system automatically maintains that field for you.
  - When you place your cursor in the Name field, a Name Entry window opens into which you can change the name components.

## Standards for Updating Name and Address Information

This section contains standards for adding and updating name and address information in the system. For more information on the procedure for entering data and creating the ID record, see *Adding an ID Record* and *Treatment of Names and Social Security Numbers* in this guide.

### Nicknames

If the individual uses a nickname, enter that nickname in a subordinate record accessible via detail window. The system name for the storage location of nicknames is the Addree record. Enter the nickname only (e.g., Jim, Tim); do not also enter the first or last name. For more information on the Addree record, see *CX System Reference Technical Manual*.

### Maiden/Other Names

Some individuals may experience name changes after they leave your institution; the most common explanation is a marriage, but other reasons can also come into play. In such cases, enter the new name in the ID record in the format described above. The previous name will be stored in the Addree record (assuming this functionality was turned on during your set up).

### Name Suffix

The name suffix is a clarification of a person's name (e.g., Jr., Sr., or III). The system automatically stores the name suffix in a separate field in the ID record and also displays and places it in the appropriate format in the Full Name field.

**Suffix**

The suffix is a field designating a professional degree or position (e.g., Esq., M.D., or Ph.D.). It exists as a separate field on ID Entry screens and is not available as a query field on standard CX Query screens.

**Social Security Number**

If a Social Security number should change, you enter the new number on an ID Entry screen. The previous number is stored in the Addree record (assuming this functionality was turned on during your set up). For more information about the Social Security number, see *Treatment of Names and Social Security Numbers* in this section.

**Alternate Names and Social Security Numbers**

You may maintain multiple names and Social Security numbers for an individual. The Other Name detail window displays these names and numbers. You can use this screen to maintain any previous names, formal names, informal names, etc., that you want to use. For additional information, see the Other Name detail window in the *Using Common Screens* section in this guide.

**Note** Normally, alternate names and Social Security numbers are automatically maintained by the system when a change is made; you are prompted to save the previous values whenever you update the fields.

## Standards for Updating Address Information

The ID record contains two lines for adding an individual's address. Each address line contains 64 characters in which to enter information. This is considered the individual's permanent address and is used for labels and all correspondence requiring an address. Following are rules for entering information for different elements of an address.

**Abbreviations**

Use standard abbreviations for streets and directions (e.g., Ave., St., and N, S, E, W, SE, NW). Additional miscellaneous abbreviations are RR for rural route and Box for Box number.

**City**

The city field is a required field and must be entered in the available 50 character space.

**State**

Enter the conventional state code into the state field (e.g., OH, PA, VA). For foreign addresses enter the code "--".

The state table includes codes for Canadian provinces and Mexican states as well as US states.

**ZIP Codes**

The ZIP code field is a required field. If the address is from a foreign country, enter blank spaces in the field. If you know the four digit extension, enter all nine digits, inserting the hyphen after the first five digits (e.g., 19508-8764).

**Country**

Country names are validated against the Country table, a standard common table populated during your initial system setup. You select the name of the desired country from a dropdown list.

**Telephone**

United States phone numbers must include the area code and the dashes (e.g., 555-555-1234). Do not use parentheses around the area code.

### Alternate Addresses

You can maintain multiple addresses on the system. In many cases, you may need to use this feature to store alternate addresses such as summer addresses of students, addresses for students living in non-college housing, vendor remittance addresses, or previous permanent addresses.

When a new address is added, it becomes the Permanent address (that is, it is associated with a code of PERM). Previous addresses are added to the alternate address file. You may configure your system to automatically save and add the previous address.

### Military Addresses

In the system, you may also store military addresses with unconventional city and state codes. Below is information for a military student followed by an example of how to enter the information in the address fields.

Student Information	Field Entry
Jane K. Student	<b>Name:</b> Jane K. Student
PFC 813 Box 155	<b>Address:</b> PFC 813 Box 155
SPO AE	<b>City:</b> SPO
09620-0155	<b>State:</b> AE
	<b>ZIP:</b> 09620-0155

### Address Verification using QAS Software

CX maintains an optional relationship with QAS, a provider of address verification software. If your institution uses the QAS Software, entry programs will check for valid and correctly formatted addresses every time an address is entered or updated. Possible messages are:

Message	Description
No matching address was found.	QAS was unable to verify the address you entered; you must abandon your work or enter a more accurate address.
The address was verified.	QAS found a match, but there are minor differences between your entered address and the found address.  Example: 123 Main Street was entered, but QAS found 123 Main St
A similar address was found.	QAS found a match, but there are differences between your entered address and the found address.  Example: 123 W Main St was entered, but QAS found 123 E Main St.
Additional premises information is required.	QAS was unable to verify the address because of missing apartment or suite number information.
Additional street information is required.	QAS found a match, but cannot verify it is a deliverable location.  Example: You entered Main St in Richmond, VA, instead of 123 Main St in Richmond, VA.

Message	Description
Multiple addresses matched this address.	QAS found more than one address that matches the address you entered, typically because you entered an
This address is found in multiple places.	QAS found more than one match; you must provide additional information to form a deliverable address.  Example: You entered 123 Main St in Richmond, but failed to enter a state. QAS located the address in multiple cities named Richmond.
This address found is not deliverable.	QAS found a match, but it is to a non-deliverable location.  Example: The address you entered belongs to a vacant lot.
Address verified without modification.	The address you entered exactly matches the address found by QAS.

If the address information that is displayed is sufficient to provide a complete address for the person, the system provides you with the option to edit your inputted data (the **Cancel** response), to accept your data as it was entered (the **No** response), or to accept the suggested address as found by QAS (the **Yes** response).

If QAS was not able to verify the information you entered, the system provides the options for you to either edit your inputted data (the **Yes** response) or to save what you have entered (the **No** response).

### Soundex as a Tool in ID Lookup

Soundex is a program (*sndxinit*) that places a four-character code in the ID record and Alternate Name/Address record. The code is based on an algorithm that groups similar sounding names under a unique four-character code. For example, the names “Noble” and “Neuville” both have the same soundex code, N140. When you perform a query for “Noble” and indicate you want to conduct a phonetic search, the system will retrieve both names because of the soundex match.

When you perform soundex searches as well as searches on alternate names, the list of retrieved IDs will feature one of the following Match codes:

**Note** Examples are designed to emphasize the meanings of the codes and do not reflect correct name formatting for ID queries.

**I**

A name found in the ID record. For example, a search for John Smith would retrieve John Smith.

**A**

A name found in the Alternate Name/Address record. For example, if you conducted a search for Joan Brown\* and the alternate name Joan Brown was located for the current Mrs. Joan Smith, Joan Brown would appear in the retrieved ID list with a match code of A.

**IP**

A phonetic match found in the ID record. For example, if you conducted a search for Joan Brown, Jane Browne would appear in the retrieved ID list with a match code of IP.

**AP**

A phonetic match found in the Alternate Name/Address record. For example, if you conducted a search for Joan Brown and the alternate name Jane Browne was located for the current Mrs. Jane Smith, Jane Browne would appear in the retrieved ID list with a match code of AP.

**IS**

A match on similar names in the ID record. In the case of a search on similar names, numerals, spaces, punctuation, and duplicate letters are stripped before the search is conducted. For example, with the IS code, a search for Von Trapp will result with Vontrap appearing in the retrieved list. Although the IS code is similar to the phonetic match (IP) described above, it also works with similar first names.

**AS**

A match on similar names in the Alternate Name/Address record. In the case of a search on similar names, numerals, spaces, punctuation, and duplicate letters are stripped before the search is conducted. For example, with the AS code, a search for Jennifer Von Trapp Smith will result with Jenny Vontrap appearing in the retrieved list. Although the AS code is similar to the phonetic match (AP) described above, it also works with similar first names.

**Note** Consider the following elements when you perform a name search:

- An asterisk (\*) adjacent to the code indicates the records for the selected individual are locked (that is, in use by another user on your campus).
- When the results are an IS or an AS search, a name such as Mac Gregor is treated the same as Mc Gregor or McGregor (that is, the “a” is removed before the search). Note that any spaces between the parts of the name are also removed.

**Running the soundex Process**


Soundex is typically scheduled to run as a *cron* job; that is, it runs automatically at some predetermined interval. For more information about processing using *cron*, see your UNIX operating system documentation.

---

## Using Table Lookup

The table lookup feature enables you to view and select values that exist in tables so you do not have to remember all valid codes or values for a particular field. For example, when you must enter the two-character postal code for a state, you can use table lookup to view a list of the valid codes that appear in your State table, and select the code you want for the ID record you are completing.

Follow these steps to use table lookup.

1. Select the table lookup icon  to display a pop-up list of values. Alternatively, place your cursor in the desired field and press the <F6> key, or click the F6 notation in the comment line.

- Assuming the code or value you want is in the list, slide the cursor to the item you want and click the mouse button once. If the value is not in the list, you must verify the data you are attempting to enter or contact the individuals at your institution who set up the tables to have the new code or value added.

**Note** If more values exist than will fit in the pop-up window at one time, a vertical scroll bar will appear at the right of the pop-up window. To see additional values, either click on the scrolling arrows or drag the blue slider bar up or down. When you have found the desired value, simply move your cursor to the name and click the mouse button once.

## Using the ID-Type Window

When you locate a record for an individual, you may be unsure whether the located record is the correct selection. For example, if you are querying an ID record for John Smith, your institution may have several records on the database under that name. The ID-Type window can help you determine whether the person is a student, a faculty member, an alumnus, or in some other role.

### Example

The following is an example of an ID-Type window in an entry program.

The screenshot shows a window titled "ID Type/Associated Records". It contains three columns of flags, each with a label and a corresponding Y/N button. The flags are as follows:

Column 1	Column 2	Column 3
Alumni: Y	Admit: N	Student: Y
Business: Y	Undergraduate: N	Currently Enrolled: N
Constituent: Y	Graduate: N	Undergraduate: N
Donor: Y		Graduate: N
Instructor: Y	Institution: N	Student Services: Y
Foundation: N	High School: N	Residence Hall: N
Organization: N	College: N	Mealplan: N
Parent: N	Community College: N	Financial Aid: Y
Payroll: Y		Currently on Aid: N

At the bottom right of the window is a "Close" button and a small icon.

### Contents of the ID-Type Window

The ID-Type window is display-only. It contains a variety of descriptive words and phrases that can apply to an individual or an entity. The system automatically sets a Y(es)/N(o) flag next to each descriptive word or phrase, depending upon the records that exist for the entity.

The following descriptive words and phrases appear on the ID-Type window; the list shows the records or values that must be present for the corresponding flag to contain a Y. If the appropriate records or values are not present, the system sets the flag to N.

**Admit**

Contains Y(es) if an Admissions record (adm\_rec) for the ID exists in the system. The system creates an Admissions record when an individual applies for admission, and you enter information about the individual into Recruiting and Admissions entry screens.

**Alumni**

Contains Y(es) if an Alumni record (alum\_rec) for the ID exists in the system. The system creates an Alumni record in either of the following ways:

- When you use the Alumni Form in Constituent Entry to enter information about an individual
- When you use the Move Graduates to Alumni menu option on the Registrar: Session Processing menu

**Business**

Contains Y(es) if a Business record (bus\_rec) for the ID exists in the system. The system creates a Business record when you use the Business Form in Admissions Entry: Constituent Entry to enter information about an entity.

**College**

Contains Y(es) if a School record (sch\_rec) for the ID exists on the system, and if the Category field (ctgry) in the School record contains the value COL (for college). The system creates a School record in any of the following ways:

- When you use the School form in Admissions Entry or Student Entry to enter information about an entity
- When you use the tape conversion process provided by Jenzabar to load school information

**Community College**

Contains Y(es) if a School record (sch\_rec) for the ID exists on the system, and if the Category field (ctgry) in the School record contains the value JRC. The system creates a School record in any of the following ways:

- When you use the School form in Admissions Entry or Student Entry to enter information about an entity
- When you use the tape conversion process provided by Jenzabar to load school information

**Constituent**

Contains Y(es) if a Constituent Status record (consstat\_rec) for the ID exists on the system. The system creates a Constituent Status record when you add constituent information in Constituent entry. A constituent is a supporter or affiliate of an institution who is interested in the advancement or promotion of the institution; a potential or current donor.

**Currently Enrolled**

Contains Y(es) if a Student Academic record (stu\_acad\_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Session (sess) – the current academic session
- Year (yr) – the current academic year
- Registration Status (reg\_stat) – either C or R

The system creates a Student Academic record when you use the Program Enrollment Form in Student Data Entry to add information about an admitted student.

**Currently on Aid**

Contains Y(es) if a Student Financial Aid record (stufa\_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Financial Aid Year (fa\_yr) – the current financial aid year
- Packaging Status (pkg\_stat) – neither N nor R
- Total Offer (tot\_offer) – greater than 0

The system creates a Student Financial Aid record when you use the Financial Aid Entry program or the Financial Aid Need Analysis program to add data for a student for the first time in a financial aid year. You can add data in any of the following ways:

- Running the Need Analysis tape conversion process
- Running the ISARIN process in (EDE Electronic Data Exchange)
- Manually entering data

**Donor**

This field contains Y(es) if a Donor record (donor\_rec) for the ID exists on the system. The system creates a Donor record when you use the Donor Form in Constituent Entry to add information about a donor. For CX purposes, a donor is an individual, foundation, organization or institution that makes a gift to an institution.

**Financial Aid**

This field contains Y(es) if an Aid record (aid\_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Status (stat) – neither N nor R
- Amount (amt) – greater than 0

The system creates an Aid record when you award aid to a student in any of the following ways:

- Through Automated Packaging
- Interactively
- In Batch mode
- Manually

**Foundation**

This field contains Y(es) if a Foundation record (fnd\_rec) for the ID exists on the system. The system creates a Foundation record when you use the Foundation Form in Constituent Entry to add information about an entity.

**Graduate (Admitted)**

Contains Y(es) if an Admissions record (adm\_rec) for the ID exists on the system, and if the Program field (prog) in the Admissions record contains the value GRAD. The system creates an Admissions record when an individual applies for admission, and you enter information about the individual into Recruiting and Admissions entry screens.

**Graduate (Student)**

Contains Y(es) if a Student Academic record (stu\_acad\_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Program (prog) – GRAD



- Session (sess) – the current academic session
- Year (yr) – the current academic year
- Registration Status (reg\_stat) – either C or R

The system creates a Student Academic record when an individual registers for a session.

### High School

Contains Y(es) if a School record (sch\_rec) for the ID exists on the system, and if the Category field (ctgry) in the School record contains the value HS. The system creates a School record in any of the following ways:

- When you use the School form in Admissions Entry or Student Entry to enter information about an entity
- When you use the tape conversion process provided by Jenzabar to load school information

### Institution

Contains Y(es) if a School record (sch\_rec) for the ID exists on the system. The system creates a School record in any of the following ways:

- When you use the School form in Admissions Entry or Student Entry to enter information about an entity
- When you use the tape conversion process provided by Jenzabar to load school information

### Instructor

Contains Y(es) if a Faculty record (fac\_rec) for the ID exists on the system. The system creates a Faculty record when you enter personnel information about an instructor.

### Mealplan

Contains Y(es) if a Student Services record (stu\_serv\_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Session (sess) – the current academic session
- Year (yr) – the current academic year
- Meal Plan Waived (meal\_plan\_wvd) – not Y

The system creates a Student Services record when you use either of the following two menu options on the Student Services menu:

- Add Student Service Record
- Update Student Service

### Organization

Contains Y(es) if an Organization record (org\_rec) for the ID exists on the system. The system creates an Organization record when you use the Organizations Form in Constituent Entry to add information about an entity.

### Parent

Contains Y(es) if a Constituent Status record (consstat\_rec) for the ID exists on the system, and if the Constituent Status field (consstat) in the Constituent Status record contains the value FPARENT. The system creates a Constituent Status record when you add constituent information in Constituent entry.

**Payroll**

Contains Y if a Personnel record (pers\_rec) for the ID exists on the system. The system creates a Personnel record when you use the Personnel Entry process on the Payroll/Personnel: Data Entry menu.

**Residence Hall**

Contains Y(es) if a Student Services record (stu\_serv\_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Session (sess) – the current academic session
- Year (yr) – the current academic year
- Building (bldg) – neither blank nor COMM

The system creates a Student Services record when you use either of the following two menu options on the Student Services menu:

- Add Student Service Record
- Update Student Service

**Student**

Contains Y(es) if a Program Enrollment record (prog\_enr\_rec) for the ID exists on the system. The system creates a Program Enrollment record when you use the Program Enrollment Form in Student Data Entry.

**Student Services**

Contains Y(es) if a Student Services record (stu\_serv\_rec) for the ID exists on the system. The system creates a Student Services record when you use either of the following two menu options on the Student Services menu:

- Add Student Service Record
- Update Student Service

**Undergraduate (Admitted)**

Contains Y(es) if an Admissions record (adm\_rec) for the ID exists on the system, and if the Program field (prog) in the Admissions record contains the value UNDГ. The system creates an Admissions record when an individual applies for admission, and you enter information about the individual into Recruiting and Admissions entry screens.

**Undergraduate (Student)**

Contains Y(es) if a Student Academic record (stu\_acad\_rec) for the ID exists on the system, and if the following fields contain the specified values:

- Program (prog) – UNDГ
- Session (sess) – the current academic session
- Year (yr) – the current academic year
- Registration Status (reg\_stat) – either C or R

The system creates a Student Academic record when an individual registers for a session.



# Using Other Menu Features

This section provides information and step-by-step procedures for you to follow when you do the following:

- Change your password
- Manage your printing of reports and letters

The system provides access to processes for these miscellaneous tasks on the Utility menu in the navigation pane.

**Note** Other miscellaneous processes also exist under the Utility menu, as follows:

Process	Resource	Provided by...
Letters/Labels	<i>Communications Management User Guide</i>	Jenzabar
ADR Options	<i>Communications Management User Guide</i>	Jenzabar
Subscriptions	<i>Communications Management User Guide</i>	Jenzabar
Run SQL	<i>Informix SQL User Guide</i>	IBM Corporation

## Before You Begin

Before you begin to use the following procedures for these miscellaneous tasks, remember the following:

- Your password must remain confidential to protect your institution's security.
- You must know the name of the printer you want to use.
- You must know the name of the forms you use to print your reports and letters.

## Menu Options to Use

- Select **Utility Menu > Login > Change Password** to change your password.
- Select **Utility Menu > Printer Control** to manage your printing processes.

## Changing Your Password

Jenzabar recommends that, for security reasons, you change your password at least once every month or two. In addition, you must not write your password, or tell it to anyone.

When you enter your password at the appropriate prompt, UNIX does not display the characters that you enter. By not displaying your password, the system helps to preserve security.

## Password Characteristics

Your password must meet the following minimum criteria:

- It must be at least six characters in length
- It must contain at least one numeric (or special) character
- It must contain at least two alphabetic characters

In addition, Jenzabar suggests the following guidelines as you select your password:

- Never use a name or initial of a family member or pet, or an important date.
- Do not use actual words as passwords, attaching a number to the beginning or the end of the word.
- Since you should never write your password, select a password that you can remember without difficulty. For example, a password that you can pronounce is easier to remember.
- The most secure passwords imbed numerics within alphabetic characters.
  - Good examples: rox18hab, bee92ar, ga8ttag
  - Poor examples: john42, 16rover, an010294, compute, sqd01yiw

**Note** The operating system recognizes the difference between uppercase and lowercase letters, and special characters, (e.g., “, ‘, !, and \*, which are also valid). You can mix upper-case letters and special characters with the other letters and numbers to create a more secure password.

## How to Change Your Password

To change your password.

1. Select **Utility Menu > Login > Change Password**, and then select **Finish** in the window that appears. Minimize or move aside that window and look at the SSH Message Console (the window that appears after launching and contains general information about your session). The SSH Message Console displays the following prompt:

```
Changing password for username
Old password:
```

2. Enter the password that you want to change, and press **Enter**. The system displays the following prompt:

```
New password:
```

3. Enter your new password and hit **Enter**. The system displays the following prompt:

```
Re-enter new password:
```

4. Enter your new password a second time to confirm that you typed it correctly. The system confirms that you changed your password.

**Note** If you type your password incorrectly the second time, the system prompts you to enter your new password again.

---

## Managing Your Printing Processes

The system provides a variety of ways you can manage your printing processes. For example, you can ensure that, when you use special paper for a print job, no one else can use the printer. You can also view the status of your print jobs, and delete a job from the print queue if desired.

### Printer Control Processes

The following lists and describes the printer control processes that you can access from the menu to manage your print jobs.

All the processes described below appear under Utility Menu > Printer Control on the navigation tree.

#### Clear Form Type

Clears the specified form type from the printer's memory. After you eliminate the form type from the printer's memory, you can specify another form type using the Load Form Type menu option, or you can print jobs on standard paper. You typically need to do this step when you finish printing a special type of form to free up the printer for other users and form types.

#### Display Spooler Status

Displays information about the print jobs that await processing for the printer that you specify.

#### Idle Printer

Enables you to interrupt the print queue when the printer completes printing the current print file.

**Note** When you stop the printer with this option, you must restart the printer to enable it to print again.

#### Load Form Type

Enables you to specify the name of the form type that you want to associate with the printer for the upcoming print job. The form type corresponds to the name of a particular type of printed paper (e.g., letterhead, paper type, transcript form, or check).

#### Print Any Jobs

Enables you to unlock the printer after you have reserved it for a single user, after you provide the name of the printer.

#### Print File

Enables you to print any file, after you provide the following information:

- Name of printer
- Number of copies
- Form type, if any
- Filename

**Print Jobs for One User**

Enables you to lock the printer for a single user, after you provide the following information:

- Name of printer
- User name

**Remove Print File**

Deletes a file from the print queue, preventing it from printing.

**Slave Printer Options**

If applicable, enables you to set the print characteristics for a slave printer that is dedicated to your computer. Using this option, you can send codes to your printer to change the way it prints.

**Note** If you use a slave printer in your office and want to change the way it prints, contact your Jenzabar coordinator.

**Start Printer**

Restarts the printer after you have used the Idle Printer menu option, or after you have cleared the form type.

## How to Use the Printer Control Processes

The following lists and describes how to use the printer control processes in this section.

**When you want to print the contents of a standard file**

- Print File

**When you want to print a file that requires a special form type**

- Print Jobs for One User
- Idle Printer
- Load Form Type
- Start Printer

**When you want to determine your print job's position in the printer's queue**

- Display Spooler Status

**When you want to make the printer available to other users after printing a special job**

- Clear Form Type
- Print Any Jobs
- Start Printer

**When you change your mind about printing a file and want to remove it from the printer's queue**

- Remove Print File

**When you want to use a slave printer**

- Slave Printer Options

**Note** Contact your Jenzabar coordinator for information about using this option.



# Requesting Operator Forms

---

This section provides information and step-by-step procedures to follow when you:

- Produce a form for a current student
- View a current student's form request history

---

## Before You Begin

Before you begin to use the following procedures for requesting operator forms, remember:

- An ID record for the student must already exist on your database.
- A Program Enrollment record must exist for the student.
- Use the field descriptions in the *Using Common Screens* section of this guide when you complete the fields on the screens discussed in this section.
- A form generally includes a large amount of information (e.g., biographical) about one individual.

---

## Process

This list shows the general phases that take place before, during, and after requesting operator forms.

1. The student has been admitted to the institution.
2. The student has registered for courses.

---

## Producing a Form for a Current Student

Follow these steps to produce a form for a current student.

1. Select **Student Management > Registrar > Registration>SDS > Operator Form Request** in the navigation pane. The Operator Form Request screen appears with the cursor in the Session field.
2. Do you know the Session code?
  - If yes, enter the Session code, and then press <Tab>.
  - If no, click the down arrow to the right of the field or **select <F6>** for Table Lookup, highlight the correct Session code, and then select **OK**.In both cases, the cursor moves to the Academic Year field.
3. Enter the instructional year (e.g., 2011). The cursor moves to the Program field.

4. Do you know the Program code?
  - If yes, enter the Program code. The cursor moves to the Session field.
  - If no, click the down arrow to the right of the field or select <F6> for Table Lookup, highlight the correct Program code, and then select **OK**.
5. Select **Finish**. The Operator Form Request – Operator Form Request screen appears with the cursor in the ID field.
6. Enter the identification number of the student, and then select **Done**. The Name, Address, City, and State/ZIP fields display information for the individual whose identification number you entered.
7. Select **Form Order**. The cursor moves to the Form name field.
8. Enter the code for the desired form (e.g., SDSBATCH), and then press <Tab>. The cursor moves to the Alternate recipient? field.

**Note** The form code you select must allow for an alternate recipient.

9. Is the form to go to an alternate recipient?
  - If yes, enter **Y**. The Alternate Recipient window opens with the cursor in the Alternate recipient ID field. Go to step 12.
  - If no, enter **N**. Go to step 13.
10. Enter the identification number of the alternate recipient, and then select **Finish**. The Operator Form Request – Operator Form Request screen appears.

**Note** You can also send a form to an individual who has no ID number on the system if the contact is not set up to run in Batch mode.

11. Select **Finish**. The Order Quantity window opens with the cursor in the Forms Requested field. Select the number of forms you want. A message appears indicating that an order was placed for the type of form you selected.
12. Select **OK**. The message disappears.
13. Do you want to produce a form for another current student?
  - If yes, select **Query**, and then go to step 8.
  - If no, select **Exit**. A message appears asking “Are you sure you want to exit?” Go to step 16.
14. Select **Finish**. The word “Working” appears on the comment line at the bottom of the screen. It disappears after the form has printed.
15. Do you want to produce a form for another current student?
  - If yes, select **Query**, and then go to step 8.
  - If no, select **Exit**. A message appears asking “Are you sure you want to exit?” Go to step 16.
16. Do you want to exit?
  - If yes, select **Yes**.
  - If no, select **No**. The message asking “Are you sure you want to exit?” disappears.



## Viewing a Current Student's Form Request History

Follow these steps to view a current student's form request history.

1. Select **Student Management > Registrar > Registration>SDS > Operator Form Request** in the navigation pane. The Operator Form Request screen appears with the cursor in the Session field.
2. Do you know the Session code?
  - If yes, enter the Session code, and then press <Tab>.
  - If no, click the down arrow to the right of the field or select <F6> for table lookup, highlight the correct Session code, and then select **OK**.

In both cases, the cursor moves to the Academic Year field.
3. Enter the instructional year (e.g., 2011). The cursor moves to the Program field.
4. Do you know the Program code?
  - If yes, enter the Program code. The cursor moves to the Session field.
  - If no, click the down arrow to the right of the field or select <F6> for Table Lookup, highlight the correct Program code, and then select **OK**.
5. Select **Finish**. The Operator Form Request screen appears with the cursor in the ID field.
6. Do you know the identification number or Social Security number of the student whose form request history you want to view?
  - If yes, enter the identification number or Social Security number in the ID field, and select **Done**. The student data appears.
  - If no, select Lookup ID to perform a query by student name. Then enter the identification number or Social Security number in the ID field of the Operator Form Request screen, and select **Done**. The student data appears.
7. Select **History**. The cursor appears in the Form name field.
8. Enter the code for the desired form, or click the down arrow to the right of the field or select <F6> for Table Lookup.
9. Select **OK**. One of the following occurs:
  - A message appears stating there is no record of previous requests for a form of the type you specified  
**Example:** There is no record of previous requests for a form of type 'UFLBATCH' for student ID: XXXXXXXX.
  - The student's form request history appears
10. Do you want to view another current student's form request history?
  - If yes, select **Query**, and then go to step 8.
  - If no, select **Exit**.



# Updating the CX Database

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## Overview – Updating the CX Database with JICS Data

---

### Introduction

This section provides information and step-by-step procedures to follow when you:

- Access data obtained via the JICS My Info portlet
- Save or discard the data

To perform the procedure, you use the JICS My Info Update (*icsbioupd*) program.

### Why This Process is Necessary

Individuals can use the JICS My Info portlet to change demographic information. Sometimes, changes are made that are erroneous or inappropriate, and these changes can be identified via a screening or review process. By screening changes that users may have entered, you can ensure that your CX database contains only the highest quality data.

Because information entered via JICS must be reviewed before it is incorporated into the CX database, it initially exists only in temporary records. The JICS My Info Update program causes the reviewed contents of the temporary records to be added or updated into your permanent records.

### Before You Begin

Before you begin to use the following procedures, remember:

- Each office has responsibility for maintaining information from its particular area. For example, the Registrar's office screens information submitted from students, and the Institutional Advancement screens information submitted from alumni or other constituents.
- Until the changed information is reviewed, it does not reside on your CX database and is not visible to the user who submitted the changes.

---

## Screens

The screens on which you review the JICS data are:

## JICS My Info Update Screen

The JICS My Info Update screen contains a summary of name and address information, both as it has been submitted from JICS and as it exists within the CX database.

Using this screen, you can edit the JICS submitted information in the active fields in the top portion of the screen. The lower portion of the screen is display-only.

An example of the screen follows; its fields are self explanatory.

The screenshot shows a window titled "JICS My Info Update - JICS MyInfo Update". It has a menu bar with "File", "Edit", "Commands", and "Help". Below the menu is a toolbar with icons for file operations and a "EXIT" button. The main content area is divided into two sections:

**JICS Personal Information...**

ID Number	13579	Date Added	07/08/2010
Title	MISS Miss	Birth Date	10/24/1962
First Name	Dorothy	Middle Name	
Last Name	Sadlon	Marital	S
Suffix		Gender	F
Nickname	Dora	Ethnic Code	UN
Address	9876 Rama Terrace	City	Mason
		State	KY ZIP 54321
Country	USA County	Phone	513-956-3310 Ext 399
Email	dorothy.sadlon@gmail.com		

**Current Personal Information...**

Title	MISS Miss	Birth Date	10/24/1962
Fullname	Sadlon, Dorothy	Marital	S
Suffix		Gender	F
Nickname	Doro	Ethnic Code	UN
Address	9876 Rama Terrace	City	Mason
		State	KY ZIP 54321
Country	USA County	Phone	513-956-3310 Ext 399
Email	dorothysadlon@jenzabar.net		

At the bottom of the window is a tab labeled "PERSONAL INFORMATION VIEW".

### Commands

You can execute the following commands from this screen.

#### List

Displays the original list of records on the JICS Personal Information window.

#### List Addr

Displays the JICS Other Addresses window, where any recently added addresses appear. From the Other Addresses window, you can select **View Detail** to review all the addresses that have been entered or changed since your last review of JICS information, and accept or reject them as appropriate.

#### Update

Places the screen in Update mode so you can change the contents of the JICS Personal Info portion of the screen. Note that the lower portion of the screen containing data from your CX database is not active; you cannot directly update the CX database records from this screen.

**Transfer**

Causes the system to copy the information to permanent records in the CX database and to delete the temporary records that were created when the student or other user initially entered updated or additional information via JICS.

**Reject**

Deletes the temporary records that were created when the student or other user initially entered updated or additional information via JICS; no records in the CX database are updated.

**Comment**

Displays the Narrative Information window, where the student or other user entered comments via JICS.

**Next**

Displays the information for the next student or other user, according to the sequence on the JICS Personal Information window.

**Previous**

Displays the information for the previous student or other user, according to the sequence on the JICS Personal Information window.

**Exit**

Closes the JICS My Info Update screens.

## JICS Other Addresses Window

The JICS Other Addresses window displays any addresses that were entered via JICS. If multiple addresses were entered, you can scroll through the screen, noting that the number of the record you are viewing is in the upper right corner of the window.

An example follows; the fields are self explanatory.

ID Number	AA	Date Added
13579	BUS Business Address	08/10/2010
2442 Parkstone Pl. Bartlett TN 38134		
13579	SCH School Address	08/10/2010
320 Dawson Hall University of Cincinnati Cincinnati, OH 45221		

**Commands**

You can execute the following commands when this window is active.

**Exit**

Closes the JICS Other Addresses window and displays the JICS My Info Update screen.

**Forward**

Displays the next screenful of records, if one exists.

**Back**

Displays the previous screenful of records, if one exists.

**View Detail**

Displays the JICS Other Addresses Update screen.

## JICS Other Addresses Update Screen

The JICS Other Addresses Update screen enables you to view, change, and accept or reject the information about an address selected from the JICS Other Addresses window. It contains both the current information from your CX database and newly submitted information contained in temporary records created within JICS.

An example follows; the fields are self explanatory.

**JICS My Info Update - JICS Other Addresses Update**

File Edit Commands Help

✓ X

ID Number 13579 Date Added 08/10/201

**JICS Other Addresses....**

Code BUS Business Address

Line 1 4224 Parkstone Dr. Begin Date 07/16/2009

Line 2 End Date

Line 3

City Bartlett Phone 901-555-2195 Ext

State TN Zip 38134 Country USA

**Current Other Addresses...**

Code BUS Business Address

Line 1 132 Donner Ln. Begin Date 04/12/2004

Line 2 End Date

Line 3

City Bartlett Phone 901-555-8671 Ext

State TN Zip 38135 Country USA

OTHER ADDRESSES UPDATE

### Commands

You can execute the following commands from this screen.

**List**

Displays the original list of records on the JICS Personal Information window.

**Main**

Displays the JICS My Info Update screen.

**Update**

Places the screen in Update mode so you can change the contents of the JICS Other Addresses portion of the screen. Note that the lower portion of the screen

containing data from your CX database is not active; you cannot directly update the CX database records from this screen.

### Transfer

Causes the system to copy the information to permanent records in the CX database and to delete the temporary records that were created when the student or other user initially entered updated or additional information via JICS.

### Reject

Deletes the temporary records that were created when the student or other user initially entered updated or additional information via JICS; no records in the CX database are updated.

### Next

Displays the information for the next address, according to the sequence on the JICS Other Addresses window.

### Previous

Displays the information for the previous address, according to the sequence on the JICS Other Addresses window.

### Exit

Closes the JICS Other Addresses Update screen.

## JICS Personal Information Window

The JICS Personal Information window is the first window to appear when you launch JICS My Info Update. It displays the IDs for which updated information has been submitted via JICS since your last transfer of data.

An example follows; the fields are self explanatory.

The screenshot shows a window titled "JICS Personal Information". It displays a table with two records. Each record has a header row with "ID Number", "Title", "Date Added", and "Address". Below each header row are three rows for "FirstName", "MiddleName", and "LastName".

ID Number	Title	Date Added	Address
5105656		07/08/2010	
FirstName	Harvey		424 Wards Corner
MiddleName			Loveland
LastName	Lester		OH 45140 USA
13579	MISS	07/08/2010	
FirstName	Dorothy		9876 Rama Terrace
MiddleName			Mason
LastName	Sadlon		KY 54321 USA

Below the table, there is a third record with a blank ID field and the following fields:

FirstName			
MiddleName			
LastName			

### Commands

You can execute the following commands when this window is active.

**Exit**

Closes application and displays the menu.

**Forward**

Displays the next screenful of records, if one exists.

**Back**

Displays the previous screenful of records, if one exists.

**View Detail**

Displays the JICS My Info Update screen.

## Narrative Information Window

The Narrative Information window allows you to view comments and information that are entered via the My Info portlet but for which there is no specific corresponding record or storage location within the CX database.

Following is an example of the Narrative Information window; the fields are self explanatory. Note that a code designates the type of comment the user entered.

The screenshot shows a window titled "Narrative Information". Inside, there is a table with three columns: "Code", "Date", and "Comment". The table has two rows of data. The first row has "BUS" for Code and "08/02/2010" for Date, with the comment "Office recently moved." The second row has "PERS" for Code and "08/12/2010" for Date, with the comment "New baby born August 6, 2010." To the right of the table, it says "Record 2 of 2". Below the table is a large empty text area.

Code	Date	Comment
BUS	08/02/2010	Office recently moved.
PERS	08/12/2010	New baby born August 6, 2010.

### Commands

The following is a list of the commands you can execute from this screen and their descriptions.

**Back**

Displays the previous comment or narrative about the constituent, if one exists.

**Forward**

Displays the next comment or about the constituent, if one exists.

**Close**

Closes the Narrative Information window, leaving the JICS My Info Update screen in view.

## Procedure

To verify the data that has been submitted via JICS is appropriate:

1. Access the menu option for JICS My Info Update for your functional area. Because the menu option is used by multiple offices, it is accessible from the following locations:

- Recruiting/Admissions: Admissions Processing: JICS My Info Update
  - Student Management: Registrar: Registration: Web Maintenance: JICS My Info Update
  - Institutional Advancement: Development: CRM Constituent: JICS My Info Update
  - Human Resources: HR Data Entry: JICS My Info Update
  - Utility: Data Entry: JICS My Info Update
2. Launch the program. All the information that has been submitted via the JICS My Info portlet appears on the JICS Personal Information window.
  3. Using your arrow keys, navigate to the desired record and select **View Detail**. The JICS My Info Update screen appears in Personal Information view.
  4. Select a command from the Commands dropdown list, based on the descriptions of the commands included with the screen description.
  5. Accept or reject the information as appropriate. Note that rejected information is discarded, while accepted information is incorporated into your CX database.
  6. Close the program when you are done. At this point, any user who entered changes via JICS will be able to view his/her accepted changes in JICS as they are part of the database.





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