



CampusVue

Basic Navigation

User Guide

Campus Management Corporation

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Preface

This document assumes that the reader knows the Windows environment and understands basic school administration terminology.

Related References

Refer to the CampusVue Help System for more information about topics discussed in this document.

Document Conventions

The following conventions are used to help guide the reader in finding information quickly.

Convention	Use
BOLD	Names of files, keys, forms, paths, and program components
>	Symbol used in paths to signify a shift to the next level of options
Note:	Important information

Definition of Terms

The word “student” is used to refer to any individual with a record in the CampusVue database, regardless of that person’s current or former status with the institution.

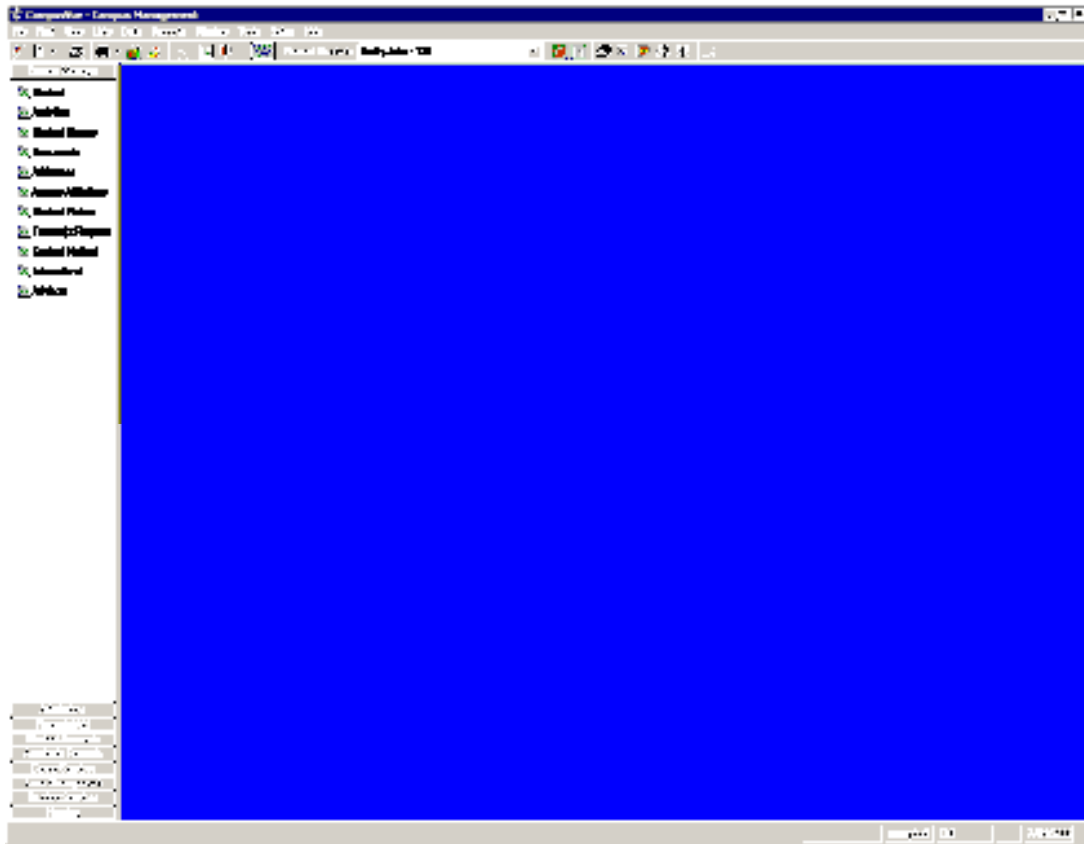
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Introduction to CampusVue

The CampusVue system for the administration of educational institutions has many features designed to help you get your job done quickly and efficiently.



CampusVue has the familiar look and feel of a Windows-based application.

CampusVue can be customized to operate according to your school's business practices and procedures.

CampusVue is organized like your school: it's composed of modules which correspond to the functional departments on your campus.

CampusVue has a comprehensive online Help system and a support desk available via Internet, e-mail, and telephone.

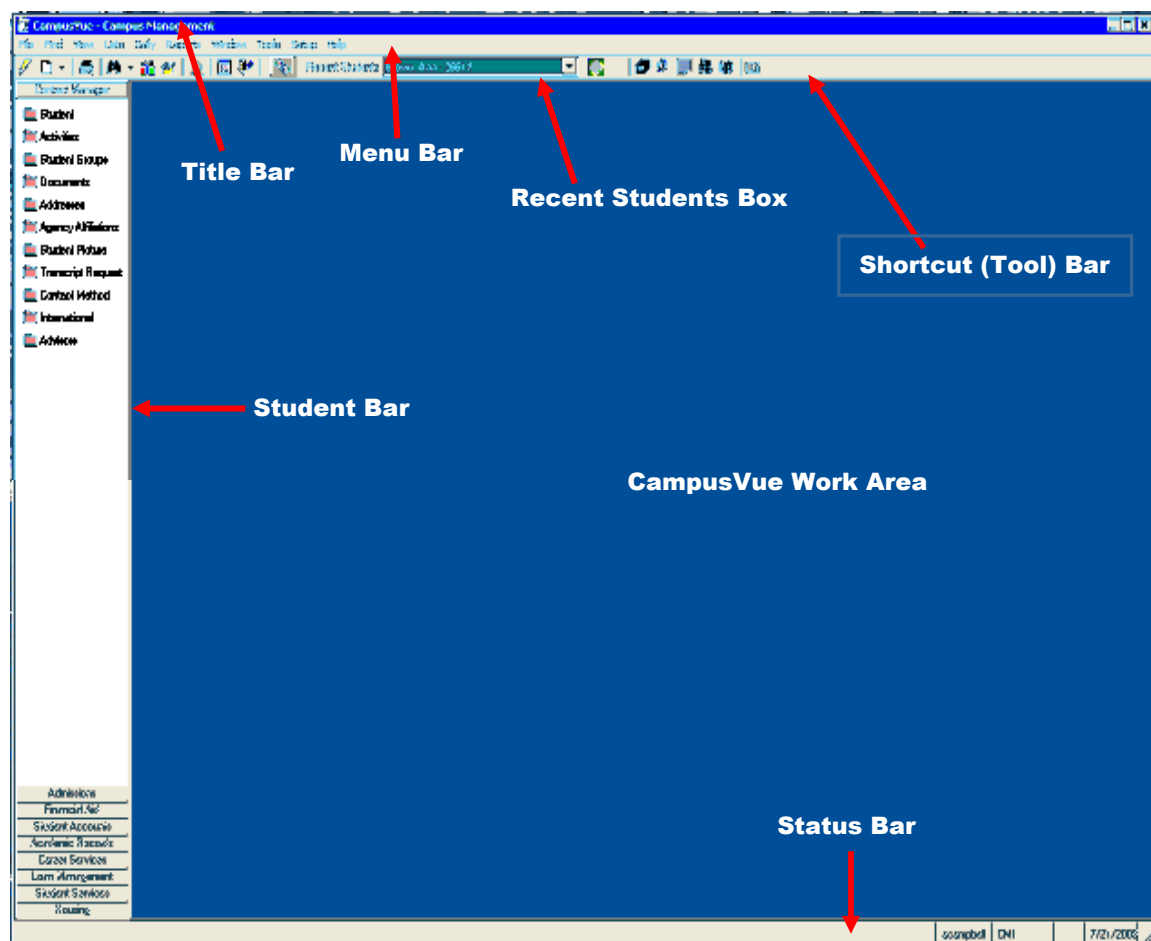
This user guide for navigating the CampusVue application will acquaint you with the basic layout of the CampusVue screen, the steps for finding student records and other information, and the many ways in which you can find answers to your questions about how to keep CampusVue working its best for you.

The CampusVue Desktop

This section prepares you to:

- identify the parts of the CampusVue desktop
- explain why different users may see different desktops
- open menus and submenus using the Menu Bar
- use keyboard shortcuts
- manage open and active windows

CampusVue opens in a window called the CampusVue Desktop.



The look of your personal CampusVue desktop is determined by your security permissions. “Permissions” refers to that group of menus, icons, folders, and processes to which you have access in the CampusVue application. These permissions are based on your job description and

are associated with your user ID, so it is important that you keep your login information confidential. If you discover that your permissions prevent you from performing your job duties in the CampusVue system, notify your supervisor or system administrator.

Your CampusVue desktop is where you will perform your daily activities and functions. On the desktop, you will find tools for use in navigating the CampusVue application. They include the **Title Bar**, the **Menu Bar**, the **Shortcut Bar**, the **Student Bar**, the **Recent Students Box**, the **Status Bar**, and the **CampusVue Work Area**. Each item is described further in the following sections.

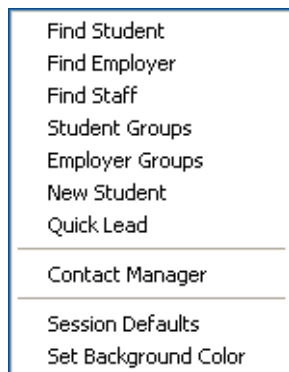
The CampusVue Work Area

The **CampusVue Work Area** is the large blue area of the desktop where folders and forms open, each in its own separate window. You can have many windows open in this work area simultaneously. As each new window opens, it will appear “in front” and may hide all or part of other open windows. At any time, you can click **Window** on the CampusVue Menu bar to see a list of your currently-open windows. A checkmark indicates the active window, and you can switch to another window by selecting it on the list. Alternatively, you can simply click anywhere in a window to make it active and bring it to the front. As in other Windows applications, you can also move windows around by “dragging” them by their title bar.



Note: There is a distinction between an open window and an active window. Several windows can be open at the same time but only the active window – the one in front – can be edited or updated.

Pop-up Menu: Right-click in the blue work area to see a menu of useful tools and shortcuts.



Title Bar

The Title Bar reads **CampusVue - your school's corporate name**.



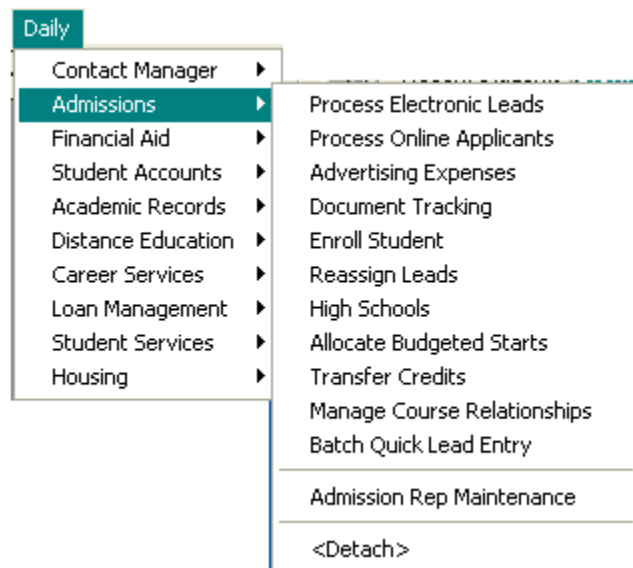
If you have permissions in more than one database (for example, if you have access to work in the data for more than one campus), the title bar's information may change as you switch between databases.

Menu Bar

The CampusVue Menu bar is the gateway to the program. Remember that the Menu bar reflects the permissions of the user who is logged in, so your personal Menu bar may vary from the full Menu bar pictured here.



Clicking on a Menu bar item displays a submenu. In the example below, clicking the **Daily** menu displays a list of departmental modules; resting the mouse pointer on **Admissions** brings up the Admissions Daily menu:



Again, your permissions will determine which menus appear on your desktop and which submenu options are available to you. For example, some options on your submenus may be “grayed-out” or “dimmed.” This indicates that the option is either inactive or unavailable to you.

Note: If you access your department's Daily menu frequently, you can click <Detach> to keep the Daily menu constantly open in your work area.

File Menu

The File menu includes options for adding a new lead, closing the active window, refreshing the active form, deleting a record, printing a picture of your screen, setting up printer options, quick return to recently-accessed records, logging off, closing all open forms at once, and exiting from the CampusVue application.

File	
Add New Lead	Ctrl+L
New Lead (full)	Ctrl+N
Close	Ctrl+F4
Refresh	F5
Delete	
Print	Ctrl+P
Print Setup	
1 Brown, Ann - 26614	
2 Abbott, Victoria - 194	
3 Ackerman, Ryan - 15942	
4 Smith, John - 126	
5 Essex, Leigh - 422	
6 Alexander, Jane - 421	
7 Baker, Ariel - 14738	
8 Grant, Ulee - 1512	
9 Twose, Jacqueline - 14747	
Logoff	
Close All Forms	
Exit	

Some menu options have keyboard shortcuts associated with them. For example, the **F5** key “refreshes,” or updates, an active form. See **Appendix A** for a list of keyboard shortcuts.

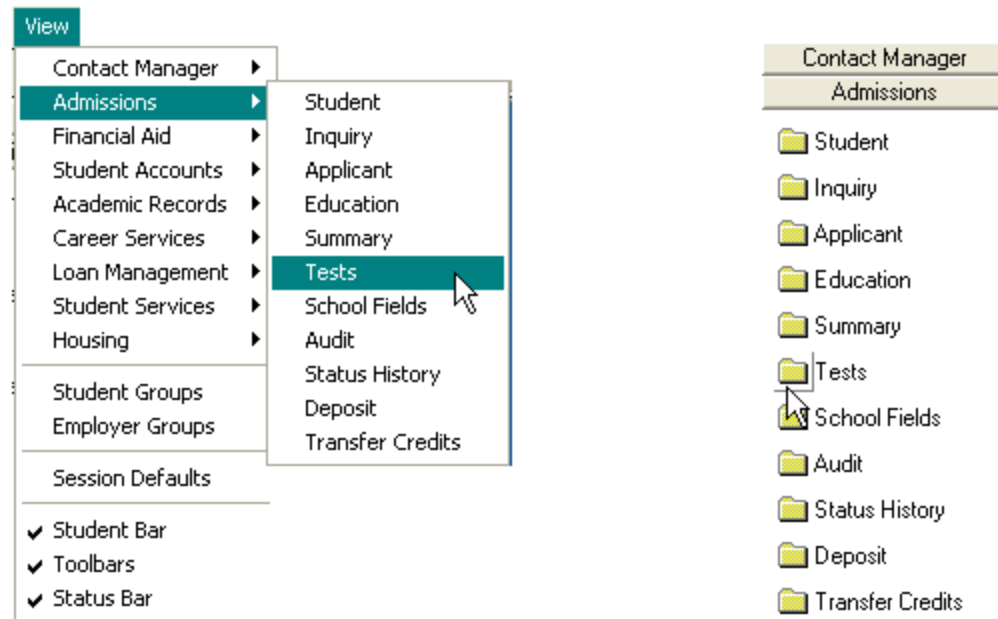
Find Menu

The **Find** menu leads you to records for an individual student or a group of students via the Student Search form. It can also move you to the next name in your Recent Students list.

Find	
Student	Ctrl+F
Next Student	F3

View Menu

The **View** menu lets you view and edit individual student information in the CampusVue system. Options are organized by department and reflect the tabs and folders on the Student Bar. For example, selecting **View > Admissions > Tests** (below left) is the same as going to the Student bar, clicking on the Admissions tab, and opening the Tests folder (below right).



The **Student Groups** and **Employer Groups** options will open the forms for managing the selected groups.

The **Session Defaults** option offers access to your session defaults (session parameters) for Campus, Term, FA Year, and Module settings. Defaults remain set until you change them.

The screenshot shows a dialog box titled 'A Campbell Session Parameters'. It contains the following fields and controls:

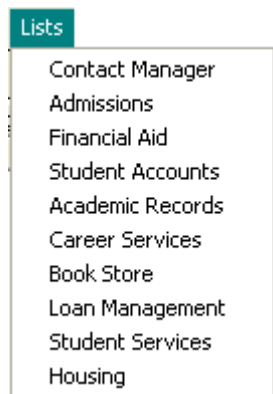
- Campus:** A dropdown menu with 'Campus Management Institute' selected.
- Term:** A text field with '2006S' and a calendar icon to its right.
- FA Year:** A dropdown menu with '2006-07' selected.
- Module:** A dropdown menu with '<no default>' selected.
- Show this screen every time CampusVue starts:** An unchecked checkbox.
- Save:** A button at the bottom right.

At the bottom of the View menu you can elect whether to see the Student Bar, Toolbar, and Status Bar on your CampusVue Desktop. (Two additional options, Customize User Toolbar and User Toolbar, may appear if your system administrator has enabled user toolbars.)

Lists Menu

The **Lists** menu is also organized by campus departments. It is used to maintain the many lists of choices that appear in the drop-down boxes throughout the system. The departmental lists are centrally controlled in this way in order to maintain data and reporting integrity.

Select a department option to open the **Setup -- Lists** form for that department.

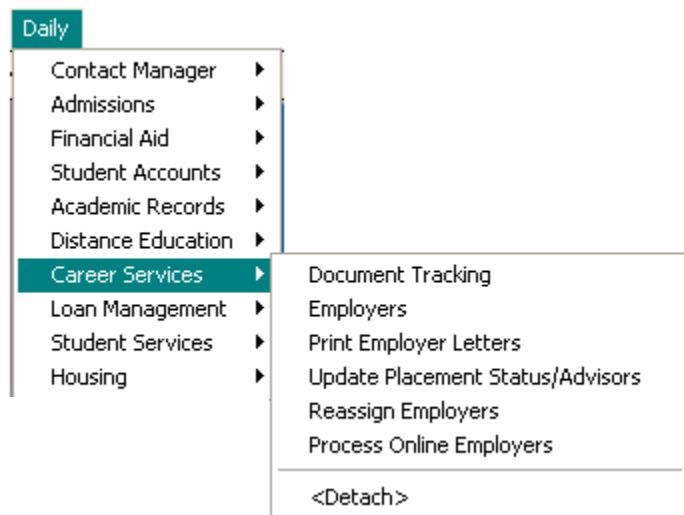


Each list is presented on a separate tab on the form. The screenshot below shows the Student Services lists. The brackets on the title bar will indicate the name of the tab (list) that has been selected.



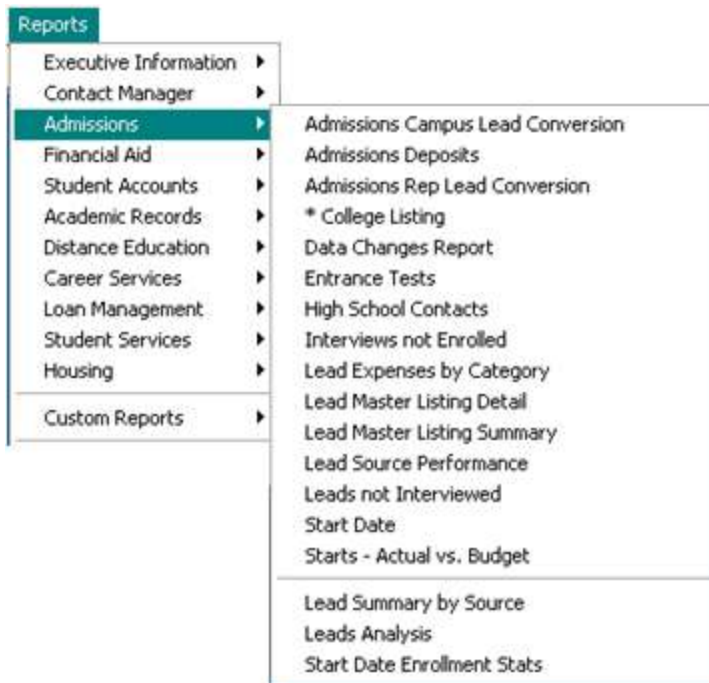
Daily Menu

The **Daily** menu for each department leads to a list of that department's batch processes. Move the mouse pointer over a department name to display that department's Daily menu, and then click on your selection.



Reports Menu

The **Reports** menu is organized by department. Move the mouse pointer over a department name to display that department's menu and make your selection. An asterisk (*) denotes a custom report designed expressly by, or for, your institution.

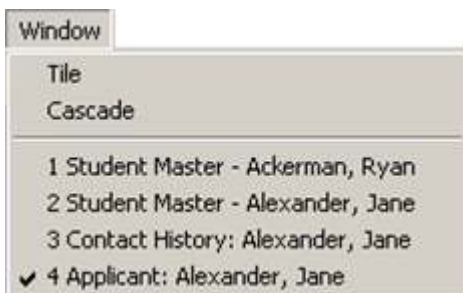


Click **Open Report Selector** to see a list of all departmental reports you have access to.

See individual department user guides or CampusVue Help for information on running reports.

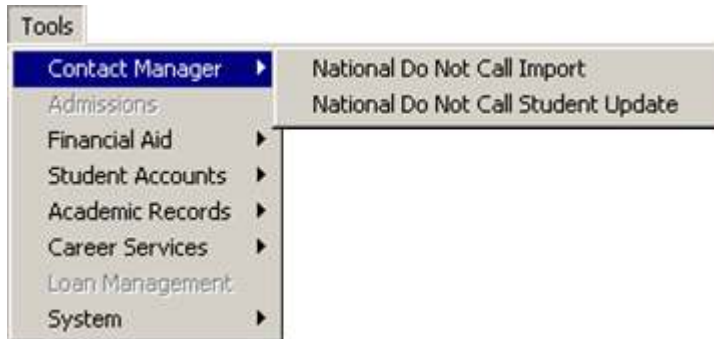
Window Menu

The **Window** menu lists the currently open windows in the CampusVue work area. Since CampusVue is capable of having many windows (forms) open at the same time, this menu changes as you open and close various forms. A check mark indicates the active window. The Window menu includes options for arranging windows in the work area in tiled format or in cascaded format.



Tools Menu

The **Tools** menu is organized by department and offers access to specialized processes. For example, in the Contact Manager tools menu there is a tool that checks the phone numbers in your database against the **National Do Not Call List**.



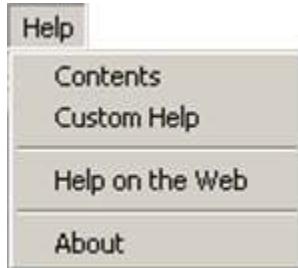
Setup Menu

Your system administrator uses the **Setup** menu to configure basic system operation and determine many of the system defaults. The Setup menu controls system parameters such as campus and staff member identification, settings for the various modules, security, access to the data dictionary, and other functions. Access to the **Setup** menu is heavily restricted.



Help Menu

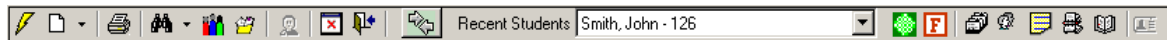
Help > Contents is the path to access the CampusVue Help system. **About** opens a window containing information about the version and build of CampusVue you are using.



See the section on CampusVue Help for more information.

Shortcut Bar

The Shortcut Bar contains a variety of command buttons that are marked with unique icons.



These buttons are found to the left and right of the **Recent Students** box. Clicking a button starts a task or opens a form or folder as described in the table below.










Remember that your security permissions may determine whether a particular button appears on your Shortcut bar.

Icons

The tables on the following pages list the Shortcut bar buttons and their functions.

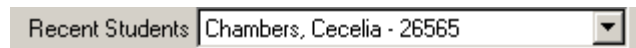
Buttons to the left of the "Recent Students" box:		
	Quick Lead icon	The Quick Lead icon is used most often by Admissions personnel who enter new lead information into CampusVue.
	New Lead Icon	The New Lead icon opens a blank student record form. The down arrow beside it opens a blank employer form.
	Print Icon	The Print icon is a "print screen" command.
	Find Icon	The Find icon opens a search form. The binoculars open a Student Search; the down arrow offers options for Employer or Staff search.
	Student Groups Icon	The Student Groups icon opens a list of existing student groups and allows you to add, search, or work with groups.
	Contact Manager Icon	The Contact Manager icon opens the screen that displays your activities, such as phone calls and appointments.
	Employer Search icon	The Employer Search icon opens the Employer Search form. It is only active when you are working in the employer database.
	Close All Forms Icon	The Close All Forms icon closes all open and active forms on the desktop.
	Exit Icon	The Exit icon is the shortcut to closing the CampusVue application.
	Toggle Icon	The Toggle icon switches between recent students and recent employers. You can use it to open the employer database.

Buttons to the right of the "Recent Students" box lead to information about the student whose name appears in the box (the "current" student):

	Green light	Student is not on hold
		Red light
	FERPA Information Icon	The FERPA Information icon allows user to view the FERPA (Federal Educational Rights and Privacy Act) information for the current student (this icon only appears when there is information to view).
	Student Contact History	The Student Contact History icon opens the student's Activities folder, which displays all current and historical activities that have been entered in Contact Manager for that student.
	Student Groups Icon	The Student Groups icon opens the student's Student Groups folder and displays any groups of which the student is a member. Here you can add the student to a group or remove the student from a group.
	Documents Icon	The Documents Icon opens the student's Documents folder, which lists all documents being tracked for the student.
	Addresses Icon	The Addresses icon opens the student's Addresses folder, showing all addresses and other contact information for the student.
	Reference Addresses	The Reference Addresses icon does not necessarily relate to the current student. Select this tool to search for one or more students by the contents of their alternative addresses (often used for loan references).
	Employer Groups icon	The Employer Groups icon opens the list of groups to which the employer belongs. Here you can add the employer to a group or remove the employer from a group. This icon is active only when you are working in the employer database.

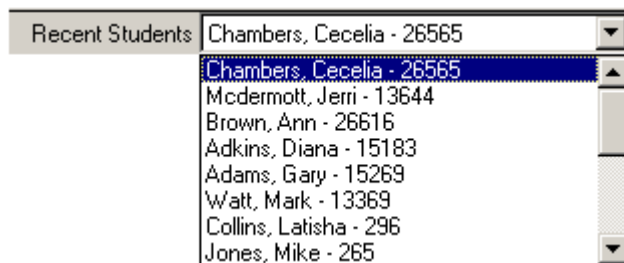
The Recent Students Box

In the center of the Shortcut bar is the **Recent Students** box.



The student whose name appears in the Recent Students box is the “current” student – the student whose records can be found on the Student bar.

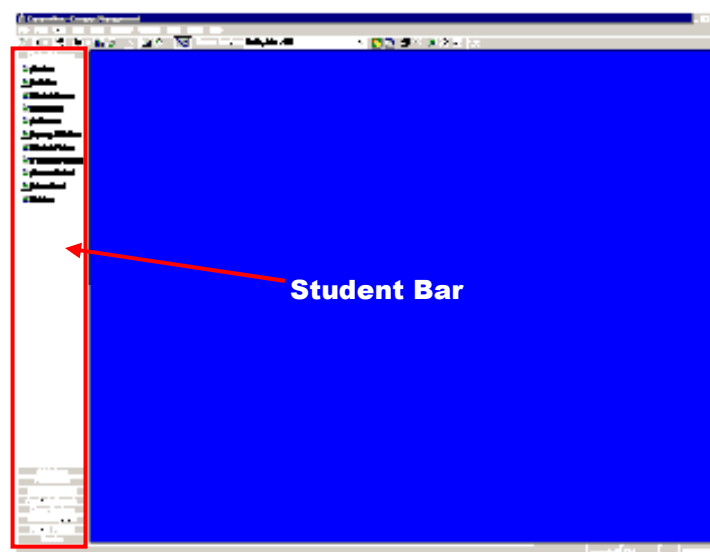
Click the down-arrow to the right of the Recent Students box to drop a list of the most recently accessed student records:



Click on a name in the list to make that student the “current student.” This action opens the student’s Student Master form and puts that student’s information in the Student bar.

Student Bar

The Student Bar is located on the left side of the CampusVue Desktop. The Student Bar matches the View Menu, giving you easy access to information regarding the “current” student (the student whose name appears in the Recent Students box).



The Student Bar functions much like a file cabinet, where each campus department occupies its own file drawer. Click on a departmental tab or “file drawer” to open it, and then click on a file folder to open that folder in your work area. You need not close one folder before opening another – it’s possible to have many folders open at once, even if they belong to different students.



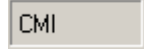
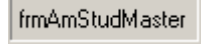
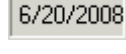
Note: The Student Bar belongs to only one student at a time: the student whose name is in the Recent Students box (also known as the “current” student). To access another student’s records, select another student from the Recent Students list (by clicking the down arrow), OR click the Binoculars to search for another student and open that student’s record (see “Searching for a Student Record”). Both methods will change the name in the Recent Students box, and the contents of the Student Bar will now belong to that student.

Status Bar

The Status Bar is located at the bottom of the screen and displays basic information about current system operations.



The individual cells are described in the table below:

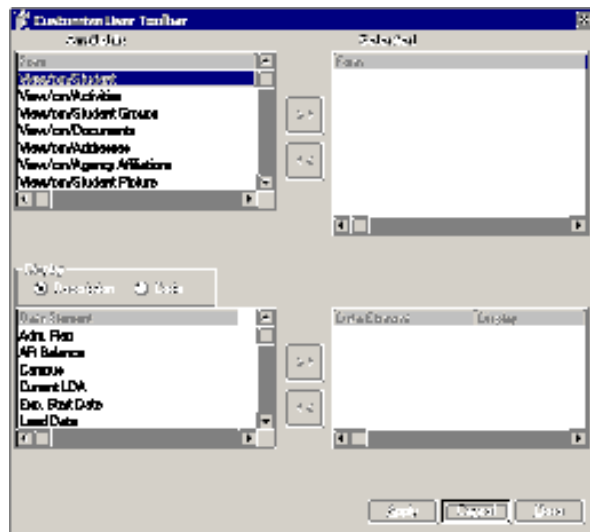
	Mode Indicator	The mode of the active window: Add, Edit, or Display.
	User ID	The user ID of the user who is currently logged on.
	Campus	The campus in which the current user is working. Double-click to open the Session Defaults box.
	Form	The name of the form currently open (or most recently opened).
	System date	The date which will be stamped on all database transactions.

User Toolbar

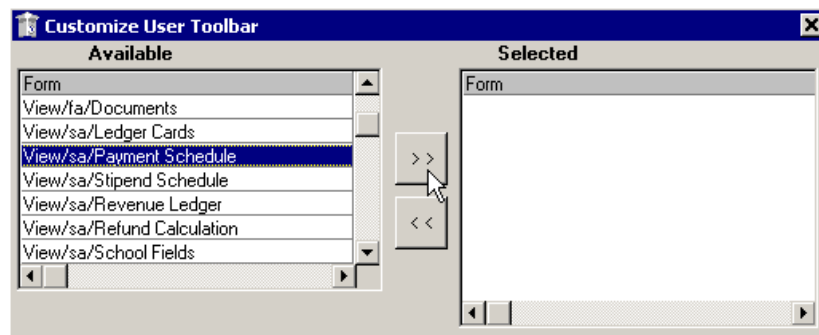
The system administrator may allow you to create a **User Toolbar** that displays custom-selected data fields for your current student. In this manner you can quickly view specific information without having to open multiple student folders.

To create a customized user toolbar:

- 1 Select **View > Customize User Toolbar** to open the Customize User Toolbar form:



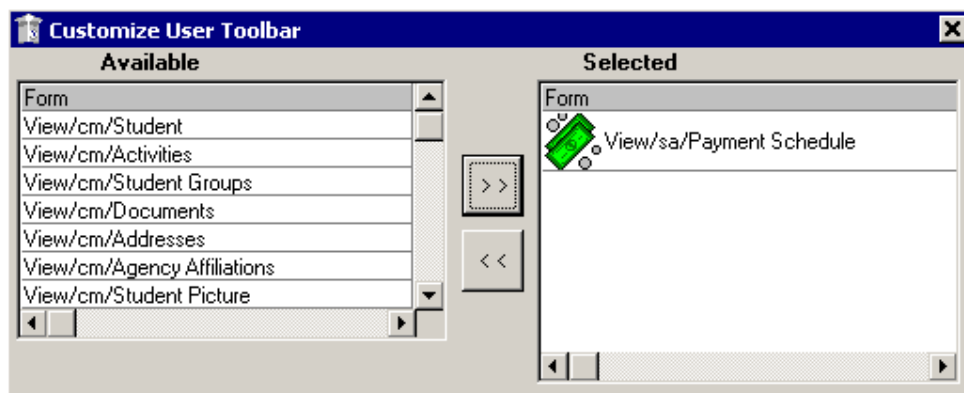
- 2 Pick your custom items from the lists. At the top left, you can select the forms or folders to which you would like a shortcut button.
- 3 Here, from the list on the right we select **View/sa/Payment Schedule**.



- 4 Click the **>>** button to move your selection to the “Selected” list on the right. A window opens for you to choose an icon for your custom button to open the “Payment Schedule” form.

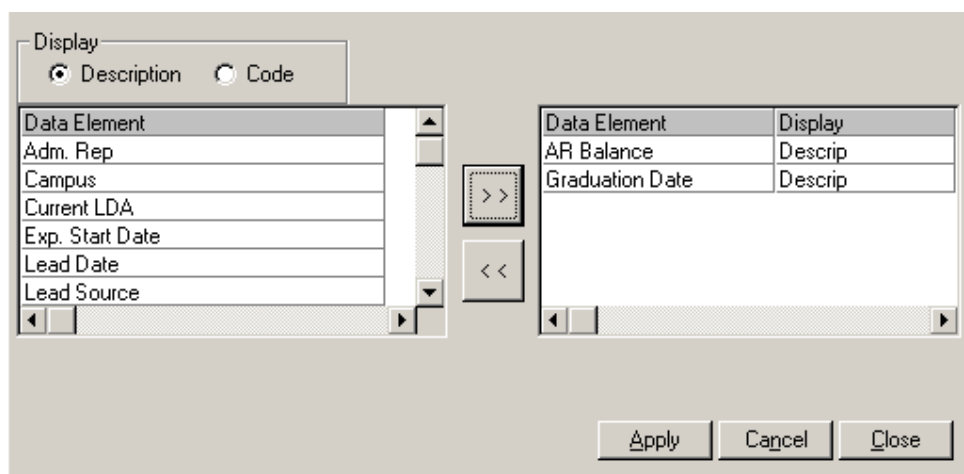


- 5 Select an icon and click **Select** to close the window and create your new custom entry.



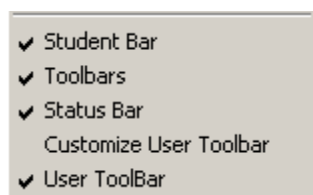
- 6 At the bottom of the form, you can select items of the current student's information that you would like to be displayed automatically in your work area.

- 7 Here we have selected AR Balance and Graduation Date.

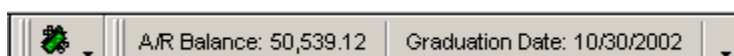


- 8 When you have made your selections, click **Apply** and **Close**.

- 9 Return to your view menu and select **User Toolbar**.



- 10 View your custom toolbar in the top left corner of your CampusVue blue work area. Here we have a shortcut to the student's payment schedule and two data fields, A/R Balance and Graduation Date:



Searching for Student Records


This section prepares you to:

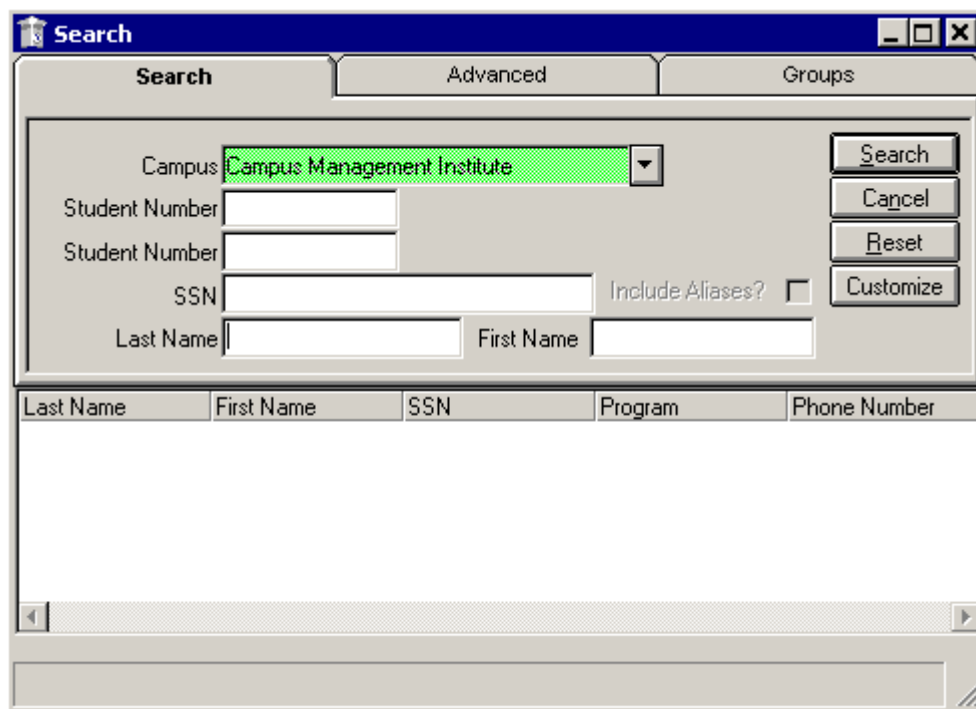
- Search for students by name or social security number
- Search for groups of students who share common attributes

The Student Search form quickly and effectively locates student records in CampusVue. In this topic, you will learn how to do a “basic” search for a student based on the student’s name, social security number, or other ID number. You’ll also learn how to do “advanced” searches, which use pre-defined filters to find groups of students who share common characteristics, such as the same school status.

The Student Search Form

There are five ways to open the Student Search form:

- Click the **Search**  icon with the binoculars.
- Click **Find** on the menu bar and select **Student**.
- Double-click in the blue CampusVue work area with the left mouse button.
- Right-click in the blue CampusVue work area and select **Find Student** from the menu.
- Use the keyboard shortcut **Ctrl+F**.



Last Name	First Name	SSN	Program	Phone Number
-----------	------------	-----	---------	--------------

The Student Search form has three tabs: **Search**, **Advanced**, and **Groups**. The **Search** tab allows you to perform a basic search, most commonly by last name and/or first name or SSN. The **Advanced** tab allows you to perform an “Advanced” search, which is a filtering process that limits the records returned to only those that match your selection criteria. The **Groups** tab is used to form a group from the search results.

Basic Search

To search for an individual student:

- 1 Enter the student’s last name and/or first name and/or social security number or other identifying number on the **Search** tab (you do not have to capitalize names).
- 2 Click the **Search** button or hit the **Enter** key on your keyboard.

The screenshot shows the 'Search' tab of a student search interface. The 'Campus' dropdown is set to 'Campus Management Institute'. The 'Last Name' field contains 'barn'. The 'Search' button is highlighted. Below the form, a table displays 8 student records matching the criteria.

Last Name	First Name	SSN	Program	Phone Number
Barnard	Kathleen	805-58-5555		(555)089-1650
Barnes	Djuna		Financial Managem	(123)456-789
Barnes	Keta	805-58-5555		(555)089-0455
Barnes	Mike	265-66-7889	Financial Managem	(555)089-1568
Barnes	Roy	805-58-5555		(555)089-
Barnett	George	805-58-5555		(555)089-8713

8 students found.

In this example, eight records matched the search criteria of “barn.” They appear in table format on the bottom half of the form, where each line represents one student record. These are the **Search Results**, and the total number of records retrieved appears in the lower left corner of the form.

- 3 Double-click a name to open the corresponding **Student Master** form. Notice that opening a student record inserts that student’s name in the Recent Students box and puts that student’s information in the Student Bar.

NOTE: You may notice a name appearing more than once in your search results. The same name may belong to more than one person, or a student may have more than one record in your database (for example, a currently-attending student may have an old lead record from several years ago). If a student has only one record but has multiple enrollments that satisfy your search criteria, each of those enrollments will be represented in the search results.

Advanced Search

An advanced search permits you to search for groups of students who share one or more common attributes, such as the same school status or the same Admissions rep.

To perform an advanced search:

- 1 Click the **Advanced** tab in the search form.

The screenshot shows a window titled "Search" with three tabs: "Search", "Advanced", and "Groups". The "Advanced" tab is selected. It contains a table with two columns: "Field" and "Value". There are five rows in the table, each with a dropdown arrow in the "Field" column and a text input field in the "Value" column. To the right of the table are three buttons: "Search", "Cancel", and "Reset". Below the table is a list of search criteria: "Last Name", "First Name", "SSN", "Program", and "Phone Number".

- 2 In the **Field** column, click the down arrow to select the first attribute to be used in the filtering process.
- 3 In the **Value** column, click the down arrow to select a corresponding value. (Hint: for the first column, picture a field in the student's record that you want to search on; for the second column, what do you want that field to say?)

This screenshot shows the same "Search" window as before, but with the first row of the table populated. The "Field" dropdown is set to "School Status" and the "Value" text input field contains "Being Processed". The other rows in the table are empty. The "Search", "Cancel", and "Reset" buttons are still present to the right of the table.

- 4 You can add additional lines to the grid to narrow your search further.
- 5 Click the **Search** button (or the **Enter** key on your keyboard) to trigger the search. In the example below, 21 students have a school status of “Being Processed.”

The screenshot shows a 'Search' window with three tabs: 'Search', 'Advanced', and 'Groups'. The 'Advanced' tab is active, displaying a table with 'Field' and 'Value' columns. The 'School Status' field is set to 'Being Processed'. To the right are 'Search', 'Cancel', and 'Reset' buttons. Below the table is a list of student records with columns: Last Name, First Name, SSN, Program, and Phone Number.

Field	Value
School Status	Being Processed

Last Name	First Name	SSN	Program	Phone Number
Ackerman	Ryan	705-58-5555	General Manageme	(555) 089-3020
Adams	Gary	805-58-5555	Facilities Manageme	(555)089-9907
Adams	John	264-56-0985	General Manageme	(954)555-9066
Adkins	Diana	805-58-5555	Facilities Manageme	(555)089-4380
Baig	Saba	589-95-6549	Distance Eduacatic	(954)899-6599
Baig	Saba	589-95-6549	Marketing Manager	(954)899-6599

21 students found.

- 6 Use additional rows of the Field/Value table to add layers to your search and narrow the results further. For example, the addition of a second row to our example shows that 15 of the original 21 students were enrolled by Able Baker.

The screenshot shows the same 'Search' window, but with an additional row in the 'Advanced' tab table. The 'Adm. Rep' field is now set to 'Able Baker'. The student list is updated to show only 15 students.

Field	Value
School Status	Being Processed
Adm. Rep	Able Baker

Last Name	First Name	SSN	Program	Phone Number
Ackerman	Ryan	705-58-5555	General Manageme	(555) 089-3020
Adams	John	264-56-0985	General Manageme	(954)555-9066
Baig	Saba	589-95-6549	Distance Eduacatic	(954)899-6599
Baig	Saba	589-95-6549	Marketing Manager	(954)899-6599
BTok	Seni	620-00-5009	General Manageme	(361) 555-4444
Dazzling	Color	236-01-0007	General Manageme	(561)555-3333

15 students found.

NOTE: Some criteria, such as “City” in the example below, have no down arrow in the Value column, indicating that you can type (in this case a city name) directly into the field.

The screenshot shows a 'Search' window with three tabs: 'Search', 'Advanced', and 'Groups'. The 'Advanced' tab is selected. It contains a table for search criteria with columns 'Field' and 'Value'. The criteria are: School Status (Being Processed), Adm. Rep (Able Baker), and City (Boca Raton). To the right of this table are buttons for 'Search', 'Cancel', and 'Reset'. Below the criteria table is a results table with columns: Last Name, First Name, SSN, Program, and Phone Number. The results table contains four rows of student data. At the bottom of the window, a status bar indicates '4 students found.'

Field	Value
School Status	Being Processed
Adm. Rep	Able Baker
City	Boca Raton

Last Name	First Name	SSN	Program	Phone Number
Adams	John	264-56-0985	General Manageme	(954)555-9066
Johnson	John	456-33-2424	General Manageme	(561)555-9900
Missile	Sam		Marketing Manager	5615558879
Roberts	Jason	555-12-1212	Facilities Managem	(561)241-8888

4 students found.

Search Tips

The following tips will not only help you to perform faster, more accurate searches, but they will also help you to get the most out of the Search form.

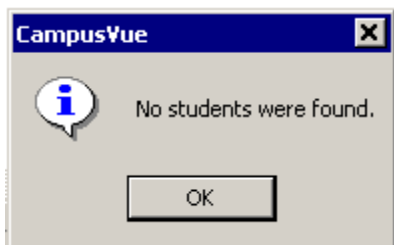
TIP: Reset the Search Form

The Search form retains the results of the last search in your current login session. To perform subsequent searches, you may need to clear all previous search criteria. To begin a new search, click the Reset button on the right.

This screenshot is identical to the one above, but the 'Reset' button in the 'Advanced' tab is highlighted with a red rectangle to draw attention to it.

A **Reset** may be especially important if your last search used both tabs, because both the **Search** and **Advanced** tabs contribute to the search results. If a search yields the “No Students Were

Found” message, it may be necessary to clear search criteria on one of the tabs, especially if you are switching from a basic to an advanced search or vice versa.



TIP: Abbreviate names

Due to occasional misspellings of a student’s name in the system, it may be prudent for you to search by entering only the first few letters in a student’s name instead of the full name. For example, use Chr instead of the full name of Christina, which might have been entered as “Christine” by mistake.

A screenshot of the 'Search' window in CampusVue. The window has three tabs: 'Search', 'Advanced', and 'Groups'. The 'Search' tab is active. It contains several input fields: 'Campus' (a dropdown menu showing 'Campus Management Institute'), two 'Student Number' fields, an 'SSN' field, 'Last Name' (containing 'Aragon'), and 'First Name' (containing 'chr'). There are also buttons for 'Search', 'Cancel', 'Reset', and 'Customize'. A checkbox labeled 'Include Aliases?' is present. Below the input fields is a table with the following data:

Last Name	First Name	SSN	Program	Phone Number
Aragon	Christine	805-58-5555		(555)089-

At the bottom of the window, it says '1 student found.'

TIP: Use “wildcard” characters

The underscore character (_) can replace one character in the search criteria field. In the example below, we entered "a_c" in the last name field, and the search retrieved students named Adcock, Arche, Archer, etc.

The screenshot shows the 'Search' window with the 'Search' tab selected. The 'Campus' dropdown is set to 'Campus Management Institute'. The 'Last Name' field contains 'a_c'. The search results table lists 7 students.

Last Name	First Name	SSN	Program	Phone Number
Adcock	Jeff	805-58-5555	Financial Managem	(555)089-1052
Arche	Peggy	805-58-5555		(555)089-6082
Archer	Charlotte	805-58-5555		(555)089-7166
Archibald	Eric	805-58-5555		(555)089-3783
Archibeque	Scarlet	805-58-5555		(555)089-7457
Atcher	John	805-58-5555		(555)089-2853

7 students found.

The percent character (%) can be used to replace a string of characters. Example: If you entered "%Donald" in the last name field, you would get students named MacDonald, McDonald, Mcdonald, etc..

The screenshot shows the 'Search' window with the 'Search' tab selected. The 'Campus' dropdown is set to 'Campus Management Institute'. The 'Last Name' field contains '%donald'. The search results table lists 11 students.

Last Name	First Name	SSN	Program	Phone Number
Grajek-mcdonald	Lois	805-58-5555		(555)089-9447
MacDonald	Severn	354-98-1226		(404) 555-9310
Mc Donald	Jason			(504)939-3838
Mcdonald	Asa	805-58-5555		(555)089-0000
Mcdonald	Kim	805-58-5555		(555)089-3895
Mcdonald	Margaret	805-58-5555		(555)089-4999

11 students found.

The Student Master Form

This section prepares you to:

- View and edit student demographic information
- Save previous address information for a student
- Determine a student's status
- Add comments to a student's record

The bulk of information stored within CampusVue is organized around students, and the heart of a student's record is the Student Master form. This topic focuses on the data contained on the Student Master form: how it gets there, how to edit it, and how to use the icons on it.

You can open the Student Master form in any of three ways:

- 1 Find the student via the Student Search form and double-click on the student's name.
- 2 Choose the student from the drop-down list in the **Recent Students** box.
- 3 With the student's name in the **Recent Students** box, click the **Student** folder under any departmental tab on the Student Bar.

Layout

The information on the Student Master form is presented in two columns.

The left-hand column contains demographic information about the student.

Student Master - Smith, John

Title <input type="text" value="Mr."/>		Student Number <input type="text" value="261"/>	PIN <input type="text"/>
Last Name <input type="text" value="Smith"/>	First Name <input type="text" value="John"/>	Campus <input type="text" value="Campus Management Institute"/>	
Middle Name <input type="text"/>	Suffix <input type="text"/>	School Status <input type="text" value="New Lead"/>	
Nickname <input type="text"/>	Maiden Name <input type="text"/>	Lead Source <input type="text" value="BOARD-Advertising"/>	
Address <input type="text" value="Deerfield Beach"/>		Lead Date <input type="text" value="4/12/2002"/>	<input type="text" value="04:32 PM"/>
City <input type="text" value="FL"/>	<input type="text" value="10"/>	Lead Type <input type="text"/>	
Country <input type="text" value="United States of America"/>	<input type="checkbox"/> Bad Address	Last Activity Date <input type="text"/>	
Phone Number <input type="text" value="(561) 555-8899"/>	<input type="checkbox"/> Bad Phone	Adm. Rep <input type="text" value="Able Baker"/>	
Work Phone <input type="text"/>	Ext. <input type="text"/>	Interest <input type="text"/>	
Other Phone <input type="text"/>	County <input type="text"/>	Program <input type="text"/>	
Mobile Phone <input type="text" value="(561) 555-5544"/>		Shift <input type="text"/>	
E-mail <input type="text" value="jsmith52@msn.com"/>		Expected Start <input type="text"/>	
Other email <input type="text"/>		Prev Education <input type="text"/>	
SSN <input type="text"/>	Gender <input type="text"/>	Agency/Sponsor <input type="text"/>	
Birth Date <input type="text"/>	Veteran <input type="text" value="Unspecified"/>	Instrument <input type="text"/>	
Marital Status <input type="text"/>	Disabled <input type="text" value="Unspecified"/>	Orig Start Date <input type="text"/>	
Ethnic Group <input type="text"/>	Nationality <input type="text"/>	Current LDA <input type="text"/>	
Citizen <input type="text"/>	Alien # <input type="text"/>	<input type="checkbox"/> Non-Immigrant Student	<input type="checkbox"/> Data Block Indicate
Driv. Lic State <input type="text"/>	DL # <input type="text"/>	DBI Date <input type="text"/>	

Buttons:

The right-hand column contains fields which describe the student's relationship with the school.

Student Master - Smith, John

Title	Mr.	Student Number	261	PIN	
Last Name	Smith	First Name	John	Campus	Campus Management Institute
Middle Name		Suffix		School Status	New Lead
Nickname		Maiden Name		Lead Source	BOARD-Advertising
Address	Deerfield Beach		Lead Date	4/12/2002	04:32 PM
City	FL	10	5400 NW 10	Lead Type	
Country	United States of America		Bad Address		
Phone Number	(561) 555-8899		Bad Phone		
Work Phone			Ext.		
Other Phone			County		
Mobile Phone	(561) 555-5544		Adm. Rep	Able Baker	
E-mail	jsmith52@msn.com		Interest		
Other email			Program		
SSN			Shift		
Birth Date			Expected Start		
Gender			Prev Education		
Marital Status			Agency/Sponsor		
Ethnic Group			Instrument		
Citizen			Orig Start Date		
DL #			Current LDA		
			Non-Immigrant Student		
			Data Block Indicator		
			DBI Date		

Buttons: Picture, E-Mail, SMS, Edit, Close

The Student Master form may be sparsely populated at first, especially if it was created by saving a Quick Lead form, which is often used by personnel who take inquiry calls and need to enter student information quickly before transferring the caller to an Admissions representative. Since the Quick Lead form has only a handful of fields, a new student record will have many empty fields. As more school personnel work with the student, they edit the form with the additional information they gather.

Notice that some of the fields appear colored or highlighted:

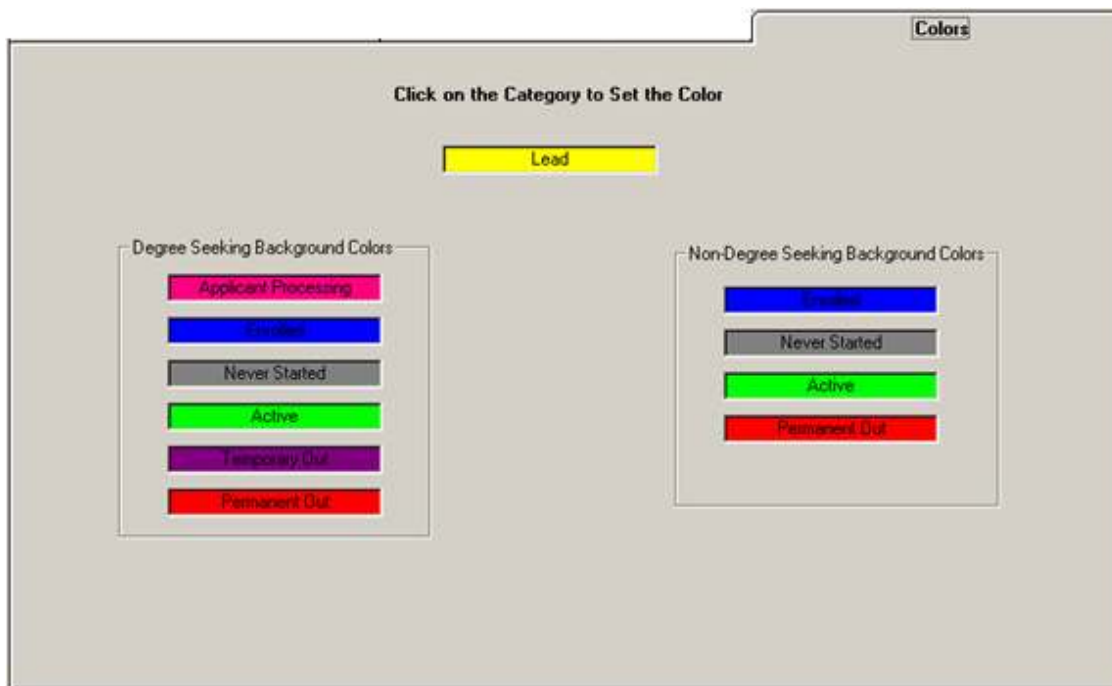
First Name	
Last Name	

These are **required** fields. This convention is used throughout the CampusVue system to indicate a field that must be completed before the form you are editing can be saved. Your institution can customize the color of required fields.

Student Master Form Border Colors

Each Student Master form has a colored border that corresponds to the student's **Status Category**. (Think of a status category as a stage in the life cycle of a student at your school.)

There are seven status categories defined by the CampusVue system: Lead, Applicant Processing, Enrolled, Never Started, Active, Temporary Out, and Permanent Out. The CampusVue default border colors are presented below. Your institution can customize the color used for each status category at **Setup > Status Codes > Colors**.



A status category may contain one or more **School Statuses**.

For example, the “Active” status category, which represents the current student population, may contain such school statuses as Active, Probation, Externship, and/or Pending Graduate. The names of these School Statuses are determined by your institution’s business practices.

The **School Status** field is located in the upper right corner of the Student Master form. The combination of status category and school status indicates the student’s current standing with the school.

Icons

There are three icons in the lower right-hand corner of the Student Master form. Their functions are described in the table at the bottom of the page.

Student Master - Smith, John

Title: Mr. Student Number: 126 PIN: 1234

Last Name: Smith First Name: John Campus: Campus Management Institute

Middle Name: A Suffix: School Status: Active

Nickname: Maiden Name: Lead Source: BOARD-Advertising

Address: 123, Wonderful Apartments Lead Date: 3/12/1999 04:04 PM

City: Tamarac FL 33441 Lead Type: Phone In

Country: Bad Address: Last Activity Date: 08/21/2007 12:00 PM

Phone Number: (954) 555-3456 Bad Phone: Adm. Rep: Andrew Mellon

Work Phone: Ext: Interest: Business

Other Phone: County: Palm Beach Program: Marketing Management

Mobile Phone: (954) 555-6666 Shift: Day

E-mail: jergensonvondugenheimer@worldslongestmai Expected Start: 9/18/2006

Other email: Prev Education: High School

SSN: 264-56-1234 Gender: Male Agency/Sponsor:

Birth Date: 6/1/1960 Veteran: No Instrument: Intramural Baseball

Marital Status: Single Disabled: No Orig Start Date: 5/3/1999

Ethnic Group: White, non-Hispanic Nationality: German Current LDA: 9/8/2006

Citizen: Eligible Non-Citizen Alien #: 234567890

Driv. Lic State: FL DL #: V989-789-02-456-0

DBI Date: 8/30/2006

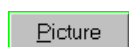
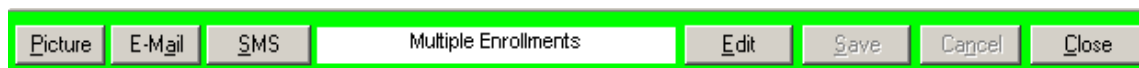
Non-Immigrant Student: Data Block Indicator:

Picture E-Mail SMS Edit Close

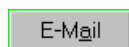
	Comment icon	The Comment icon allows you to add a comment to the student's record. When a comment is entered here, the icon will change from a white comment box to a yellow lined note. Clicking on it will allow you to add, edit, or delete comments. If comments are entirely deleted, the icon will return to a white comment box. Comments entered via this comments box are not tracked for reporting purposes and an audit trail is not kept as to who entered, edited, or removed the comments.
	Activities icon	The Activities Icon allows you to add a Contact Manager activity for the student. Activities entered via this icon are included in the student's Contact History and included in reports.
	Print Labels icon	The Print Labels icon allows you to print an individual mailing label for this student.

Buttons

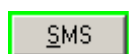
Along the lower border of the Student Master form are a series of buttons or cells of information:



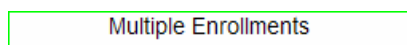
Opens a digital photo of the student (if one has been saved)



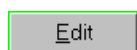
Opens a form from which you can send an e-mail message to the student, provided the student has a viable e-mail address in the Student Master form and an e-mail client is configured



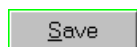
Opens a form from which you can send an SMS text message to the student, provided the student subscribes to the SMS service and a viable mobile number is provided in the Student Master form.



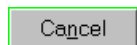
Indicates that this student has more than one enrollment in the system. Many CampusVue forms display enrollment-specific information which changes when different enrollments are selected. (This box is not present if the student has only one enrollment)



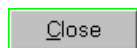
Puts the form in Edit mode for adding or changing information



Saves changes (activated in Edit mode)



Cancels changes (activated in Edit mode)



Closes the form

Editing the Student Master Form

The Student Master form may contain sparse information at first. As the student progresses through the Admissions and Applicant processes, more information is collected on the student and added to the student's record by way of the **Edit** process.

To Edit the Student Master form:

- 1 Click the **Edit** button to activate those fields in which you have permission to make changes.
- 2 Add or edit information as required.

- 3 Click **Save** to save your changes.
- 4 If you make changes to certain contact information fields, you may be prompted to save the old address information to the student's Addresses folder via the **Save Old Address** form (former contact information can be useful).

Description	Code
Parent	PARENT
Permanent Address From Online App	PERMONLN
Previous	PREV
Reference	REF
Seasonal Address	SEASONAL
SEVIS Current US Address	SUSADDR
SEVIS Foreign US Address	SFORADDR
Sponsor	SPONSOR

If you wish to save the old information, click the down-arrow on the **Address Type** field to select the type of address you are saving (usually "Previous"), and click **Save**. If you do not wish to save the old information, click **Close** and then click **No** on the "second chance" message that appears.

A change was made to the address, would you like to save the old information to another address type?

Yes No Cancel

The CampusVue Help System

This section prepares you to:

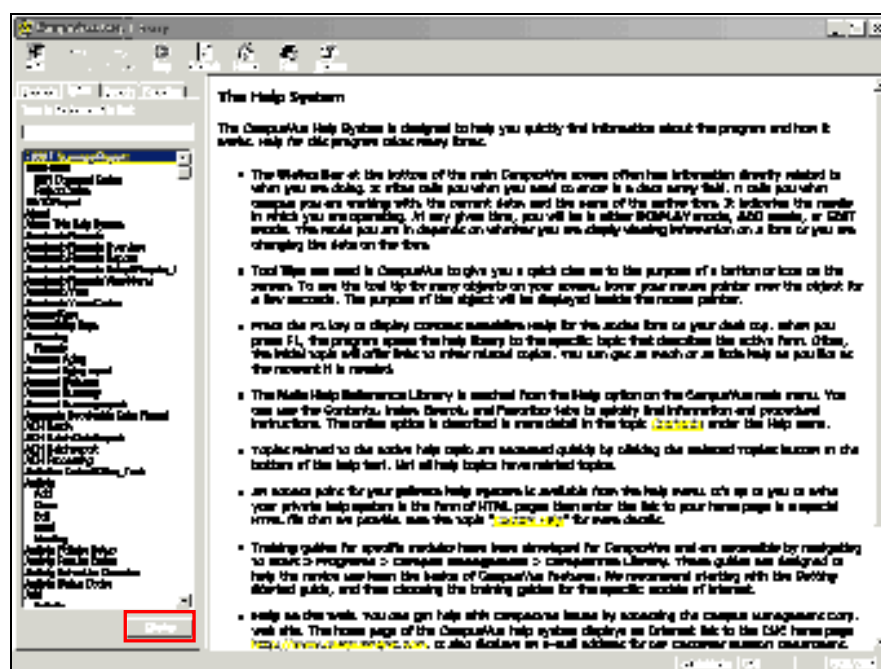
- browse Help information by subject matter
- use the Help index
- search the Help system by keyword
- save Help topics to the Favorites tab
- open context-sensitive Help
- navigate the Help toolbar

The Help System in CampusVue is an invaluable resource for new and experienced users alike. Extensively illustrated with screen shots from the application, Help is always a click away with information on topics both basic and advanced.

On the Menu Bar, click **Help > Contents** to open the CampusVue Help Library in a new browser window.

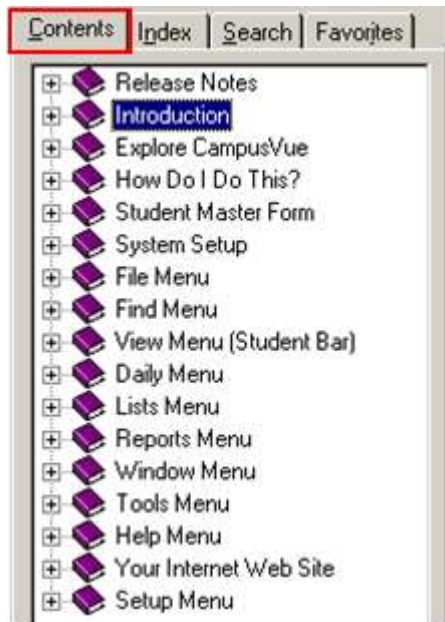


The left pane contains four tabs: Contents, Index, Search, and Favorites. The right pane displays the Help system home page.

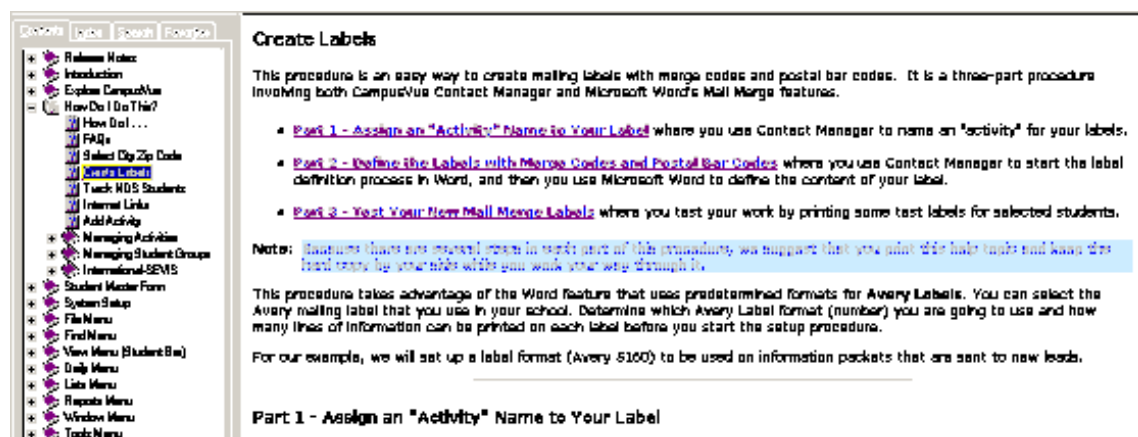


Contents Tab

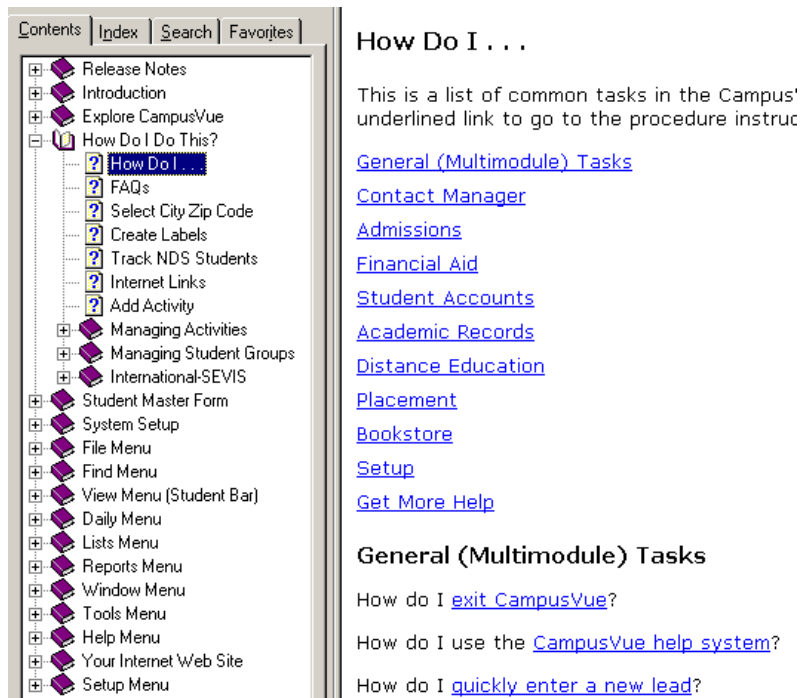
The **Contents** tab is organized much like the table of contents in a book. Click the plus (+) symbol beside any book icon to expand the list associated with it.



Click a topic to open it in the right-hand pane.

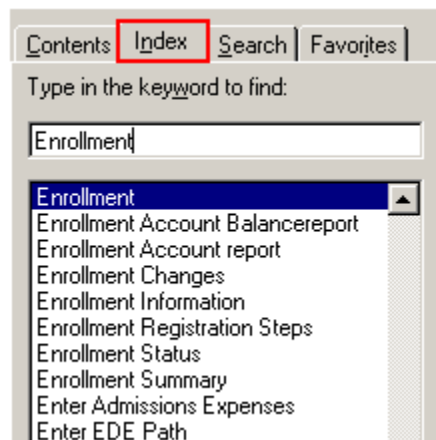


You can click on "How Do I...?" to open a list of hot links to frequently-used topics organized by departments. Click a departmental link to jump to that department's topics.

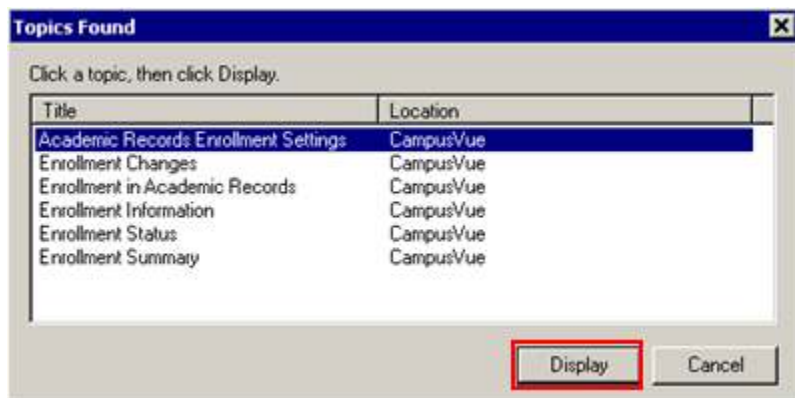


Index Tab

The **Index** tab is similar to the index in the back of a large book. You can scroll the index to find your topic, or simply type a word in the empty field to jump to that index entry. Highlight an item and click **Display**, or double-click the topic to open it.



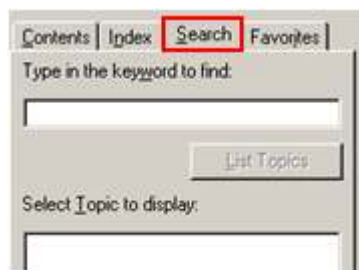
Some entries may ask you to narrow your request further. For example, selecting the entry "Enrollment" prompts a request to select from the following list:



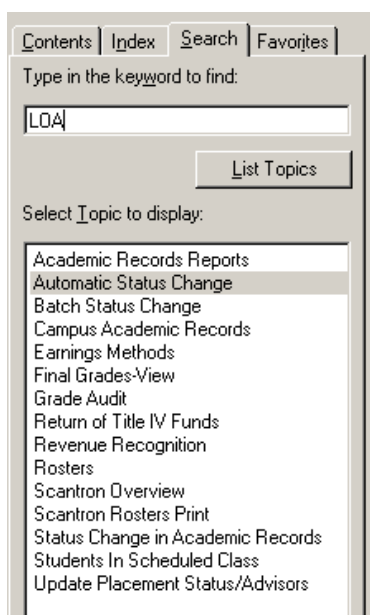
Click on a topic to highlight it and click **Display**, or simply double-click the topic.

Search Tab

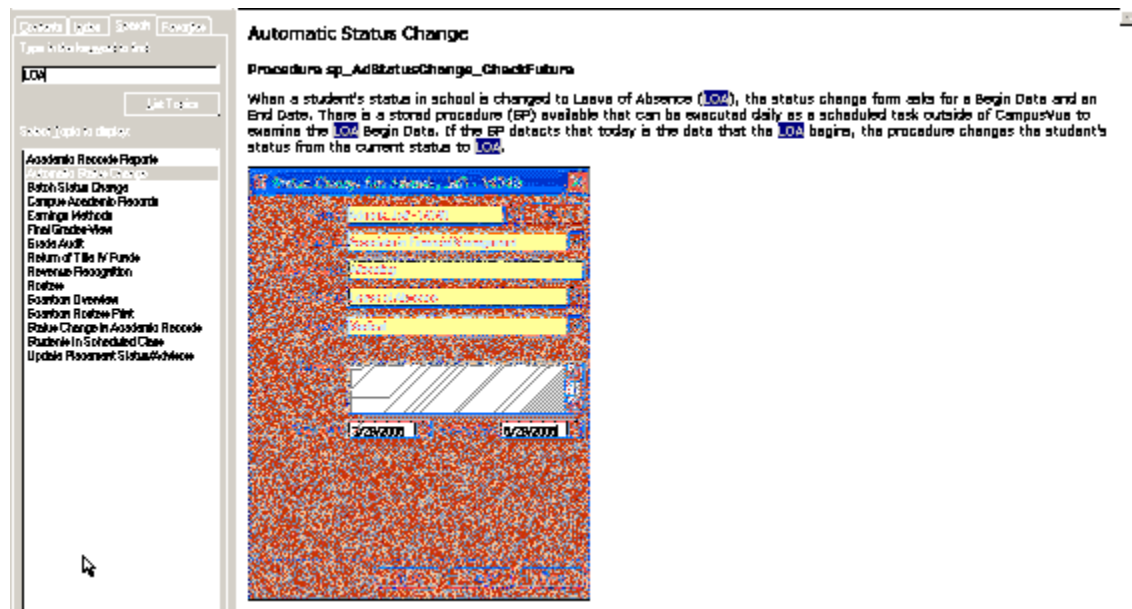
The **Search** tab is blank when it first opens.



Type a keyword or phrase in the field and click **List Topics**. Help will retrieve a list of topics *which contain that keyword or phrase*.



Open a topic to see that your keyword or phrase is highlighted wherever it appears:



Enclose your search phrase in quotation marks to return a list of only those topics which contain the complete phrase just as you typed it.

NOTE: Your list of topics may cross departmental lines. For example, if you want information on setting up a class schedule, you may type the word "schedule" as a keyword. It generates a list of topics which includes "Approve Disbursements to Pay" because financial aid disbursements are "scheduled."

Favorites Tab

Use the **Favorites** tab to bookmark your personal list of favorite (or frequently visited) help topics. Click the **Add** button to add the currently-displayed topic to the **Favorites** list. You can use the **Display** button to jump to any selected topic from the list. The **Remove** button only removes items from your **Favorites** list - it does not delete the topic from the help system.

Help System Toolbar

At the top of the CampusVue Help System window is a toolbar with several convenient features or tools. At times some of these tools may be dimmed to indicate that conditions are not right for their use.

Hide. Click this button to hide the left-hand frame of the help window. When you click this option the **Hide** button changes to Show. Click the **Show** button to bring back the left-hand frame with the **Contents**, **Index**, **Search**, and **Favorites** tabs.

Back. Click this button to go back to the topic you previously viewed.

Forward. Click this button to go forward to a topic you previously viewed.

Stop. Click this button to stop loading a help topic or searching for text.

Refresh. Click this button to refresh the current help topic.

Home. Click this button to go to the first topic in the help system.

Print. Click this button to print the current topic or all topics under the currently selected book.

Note: Although Help offers the ability to print topics for hard-copy reference, these printed materials may someday become obsolete. As CampusVue is continually updated, Help topics may need to be revised. Online Help will always contain the most current information on CampusVue functionality and operation.

Options. Click this button to display a drop-down menu from which you can hide or show the left-hand frame (tabs), go backward or forward in the list of topics you have viewed, go to the home topic, stop viewing the help system, refresh the help window, print one or more topics, and turn off highlighting of search-selected text in topics.

Shortcut Menus (Right Mouse Button)

Right-click anywhere inside the left-hand pane of the Help System and a shortcut menu will appear. Options on this menu include:

Open All: Opens all books and shows all topics in the table of contents.

Close All: Closes all books and hides all topics in the table of contents.

Print: Prints the current topic.

View Entry: Displays entry information about the highlighted topic.

Jump to URL: Opens a dialog in which you can enter a Uniform Resource Locator (URL).

Right-click anywhere inside the right-hand pane of the Help System and another shortcut menu will appear. Options on this menu include

Back: Takes you back one topic.

Forward: Takes you forward one topic.

Select All: Selects all text and graphics in the current topic.

View Source: Displays the HTML source code for the current topic page.

Print: Prints the current topic.

Refresh: Refreshes the current topic on your screen.

Properties: Displays the properties of the current HTML page.

Related Topics Button

At the bottom of most help topics is a **Related Topics** button. If you didn't find the information you wanted, click the **Related Topics** button to display other topics with closely-related content.



Context-Sensitive Help

To get instant Help when you have an open form in your work area, press the **F1** key on your keyboard to open the Help topic pertaining to your open form.

Appendix A - Keyboard Shortcuts

The following is a list of frequently-used key combinations. Some of them are specific to CampusVue and some are commonly used in all Microsoft® Windows™ applications.

Ctrl + L	Opens the Quick Lead form
Ctrl + N	Starts a new Student Master record
Ctrl + E	Selects the 'Edit' on a data form
Ctrl + S	Saves data on the active form
Ctrl + Q	Cancels the changes made to the active form
Ctrl + F4	Closes the active form
Ctrl + P	Opens the Print dialog box
Ctrl + . (period)	Makes a Print Screen of the CampusVue window
Ctrl + F	Opens the Student Search engine
Ctrl + Z	Restores previous data (undo)
F5	Refreshes active form
F3	Goes to next student
F1	Opens the CampusVue Help Library
Shift + F10	Display pop-up menu
Esc	Cancel
Spacebar	Select (same as mouse button 1 click)
Alt	Activate or inactivate menu bar mode
Alt + Esc	Display next window
Alt + Spacebar	Display control panel
Alt + Enter	Display property sheet for current selection
Alt + F4	Close active window
Alt + F6	Switch to next window within application
Alt + Print Screen	Capture active window image to the clipboard
Print Screen	Capture desktop image to the clipboard
Ctrl + Esc	Access the Start button on taskbar

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