



CampusVue

Contact Manager and Document Tracking

User Guide



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Preface

This Training Guide contains information that will enable you to use Contact Manager and Document Tracking effectively and perform specific related activities.

Related References

Refer to the following references for more information about topics frequently discussed in this document.

Related Reference	Description
Help System	Describes how to use the CampusVue product.
Basic Navigation	Describes how to Log in to and navigate through CampusVue.
Managing Career Services	Describes how to use the placement functionality in CampusVue.

Document Conventions

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

Convention	Use
BOLD	Names of files, keys, forms, paths, and program components
<i>Italics</i>	Titles, hyperlinks, and special terms
>	Symbol used in paths to signify a shift to the next level of options
Note:	Important information

Contact Manager

Contact Manager is many tools in one: a to-do list, an appointment book, a daily scheduler, a calendar, a selling aid, and a reminder of important due dates and times – not to mention a letter-generator, a note-delivery system and a student directory!


Its primary function is to schedule, track, and archive various kinds of communications between you and your students (or, in some cases, employers). These communications are called “activities,” and they include appointments, telephone calls, letters, emails, text messages, meetings, and the like. Contact Manager captures the details of these interactions and records them in a “Contact History” for the student or employer. It also makes those details available for management reporting.


Contact Name	Subject	Due Date	Time	Student Phone #	Employ
Atmann, Karen	ADM - 1st Rescheduled Interview	5/17/2005	06:00 PM	(555)089-112	
Atmann, Ronald	ADM - 2nd Rescheduled 2nd Inte	5/17/2005	06:30 PM	(555)089-	
/ American Express Corporation	Employer Phone Call	6/30/2005			(954)37
Atmann, Karen / American Express	Student Job Interest Notification	6/30/2005		(555)089-112	(954)37
Atmann, Karen / American Express	Student Job Interest Notification	6/30/2005		(555)089-112	(954)37
Carla, Mills	Change of Status Letter	7/6/2005		561-554-6767	
Abbott, Karen A	E-mail Student	7/11/2005		(213)555-8899	
Abbott, Karen A	E-mail Student	7/11/2005		(213)555-8899	

Note: Several lists support Contact Manager: **Activities**, **Activity Categories**, **Activity Status**, and **Activity Results**. The thoughtful, timely, and *ongoing* maintenance of these lists will ensure optimum performance for your school's Contact Manager users.

Contact Manager works the same way for both student and employer activities. For simplicity, all examples below are shown with students. See the *Managing Career Services* user guide for more information on working with employers in Contact Manager.

Opening and Closing Contact Manager

- Contact Manager may be set to open automatically each time you log in to CampusVue. If not, click the Contact Manager icon  on the Shortcut bar to open it.


- If you close Contact Manager, you can re-open it by clicking the Contact Manager icon  on the Shortcut bar, or selecting **Daily > Contact Manager > Contact Manager**.

Contact Manager Features

Staff Member

At the top of the **Contact Manager** form, you will see your name in the Staff Member field. If you have permission to view another staff member's activities, click the down arrow and select the staff member's name – the Activities tab will display that person's pending activities.

Description	Code
Administrator, an	
Adden, Joy	JADDEN
Astor, James	AST
Baker, Able	ABAKER
Barton, Charity	BAR
Beancounter, Dee	BEA
Bellows, Albert	BEL
Bitfiddler, Sparky	BIT

Check the **All** box  to list the activities for all staff members to which you have access.

Due Dates

The **Due Dates** fields serve as filters for the list of activities.

Due Dates	<input type="text"/>	to	<input type="text"/>	<input type="button" value="Refresh"/>
-----------	----------------------	----	----------------------	--

For example, enter today's date in both fields to narrow your list of activities to just those activities that are due today. Clear the fields to return to a full listing of your activities. Click **Refresh** to apply any changes.

Activities Tab

Your pending tasks and activities are listed on the **Activities** tab.

Priority	Contact Name	Subject	Activity Category	Due Date	Time	Student Phone #	Employee Phone #	Date Added
N	Walt, Mark	2nd Interview		7/23/2007		304-555-1212		7/23/2007
N	Stoff, John	Student Meeting		7/23/2007	08:00 AM	555-089-0334		7/23/2007
N	Carson, Johnny	New Lead Phone Call		7/23/2007	11:00 AM	304-555-1212		7/23/2007
N	Pegg, John	ACM - 2nd Rescheduled 2nd Int		7/23/2007	11:30 AM	555-089-1195		7/23/2007
N	Adair, Kim	ACM - 2nd Interview		3/24/2008	07:45 AM	555-089-4759		3/24/2008

Activities are added to the **Activities** tab in three ways:

You can add activities to your own Contact Manager.

Other staff members may assign activities to your Contact Manager, if they have the necessary permission.

The system may automatically assign activities to your Contact Manager. These activities may be triggered when pre-specified data changes occur, such as when a student's status changes or when an activity is closed with a specific outcome.

Messages Tab

You can use the **Messages** tab to send messages to other CampusVue users.

Click the **Messages** tab to view your messages. Double-click a message to open it. Click the **Reply** button to reply to the sender. Click the **Add** button to send a message.

From	Subject	Date Sent	Student
Administrator, System	Re: Reply test message	3/25/2008	Brown, Alex

Although the **Messages** tab may seem comparable to e-mail, there are important differences:

- There is no indicator to notify you that you have new messages.
- Messages cannot be filed, saved, documented, or reported.
- If you click the **Mark as Read** button, the message will be deleted from your **Messages** tab with no record retained.

Students Tab

The **Students** tab is primarily used by staff members who perform recruiting and advising functions. If you are a recruiter or an advisor, click the **Students** tab to see the list of students assigned to you. The list of students is cumulative, irrespective of student status.

The screenshot shows the 'Contact Manager' window with the 'Students' tab selected. The window has a header with 'Staff Member: Adden, Joy' and a 'Due Dates' section. Below the header is a table of students. The table has columns: Name, Phone, City, Interest, Lead Source, and Student Status. The data is as follows:

Name	Phone	City	Interest	Lead Source	Student Status
Bilings, John	(951) 999-5555	BOCA RATON		Main Herald	Attending
bat1_student1	(951) 999-9111	Fort Richardson		Automated ISR Lead	Attending
new lead bat1_new lead	(123) 456-7890	Boca Raton	Financial Management	Automated ISR Lead	Pending Applicant
TestNFI bat1_Karen	(951) 999-1212	Boca Raton	Marketing and Sales	Other College	Pending Applicant

At the bottom of the window, there are buttons for 'View Student', 'Add Activity', 'Add Message', 'Customize', and 'Done'. A status bar at the bottom indicates '4 Students Assigned to Adden, Joy (All Advisor Types)'.

You can customize the columns of information displayed on this tab by clicking the **Customize** button.

The screenshot shows the 'Student List Customization' dialog box. It has a title bar 'Student List Customization'. Inside, there are three dropdown menus for 'Campus', 'Status', and 'Program'. Below these is a section titled 'Information to Display' with a list of fields: City, Program, Interest, Lead Date, Lead Source, Zone, State, and ZIP Code. To the right of this list is a list of fields to be displayed: Student Status and HS Grad Year. There are arrows between the two lists to move items. At the bottom are buttons for 'Save', 'Cancel', and 'Close'.

Adding Activities

If you have the necessary permissions, you can add new activities in Contact Manager. Activities are created at **Lists > Contact Manager > Activities**. Your school's business practices will determine which activities need to be created for the staff members who use Contact Manager.

To add an activity to your Contact Manager:

- 1 Select the **Activities** tab.
- 2 Click **Add Activity** to open the Activity form.

The screenshot shows the 'Activity' form with the following fields and controls:

- Assign To:** A dropdown menu with 'Administrator, System' selected.
- Activity:** A dropdown menu with a green highlight.
- Student:** A text input field with a search button (three dots) and a 'Clear' button.
- Enroll:** A dropdown menu with 'AS Physical Therapist Assi' selected.
- Job:** A dropdown menu.
- EmpContact:** A dropdown menu.
- Show Available Jobs Only:** A checkbox.
- Show Active Contacts Only:** A checkbox.
- Subject:** A text input field with a green highlight.
- Due Date:** A date picker showing '4/11/2008'.
- From:** A date picker.
- To:** A date picker.
- Date Added:** A text input field.
- Time Added:** A text input field.
- Status:** A dropdown menu with 'Pending' selected.
- Priority:** A dropdown menu with 'Normal' selected.
- Activity Result:** A dropdown menu.
- Date Completed:** A date picker.
- Comments:** A large text area for notes.
- Buttons:** 'Save', 'Cancel', and 'Close' buttons at the bottom.

Your name is displayed in the **Assign To** field. You can change the name in the field if you have permission to assign activities to other staff members.

- Click the drop-down arrow to the right of the **Activity** field to select the activity you wish to add. Your list of available activities is controlled by your User ID.

Activity	
Description	Code
AM Admissions Labels	AM-LAB
AM Lead Interview	LEADINT
AM Lead Reassigned	LDREASS
AM-New Lead Label	AM-NL
CS Employer Message	EMPMESS
CS Graduate Interview w/Employer	EMPINT
E-Mail Staff	EMSTAFF
E-mail Student	EMAILSTU

- Click the activity to add it to the form. The activity now appears in both the **Activity** field and the **Subject** field.

Note: When you select an e-mail activity from the list of available activities, an additional Email Subject field appears in the Activity form. Use this field to specify the subject for the e-mail that you want to send.

Activity: E-Mail Staff

Assign To: Administrator, System

Activity: E-Mail Staff

Student: [Empty] ... Clear

App/Enroll: <All Applicants/Enrollment>

Subject: E-Mail Staff

Email Subject: E-Mail - Academic Records to Staff

Due Date: 5/1/2008 From: [Empty] To: [Empty]

Date Added: [Empty] Time Added: [Empty]


Status: Pending Priority: Normal

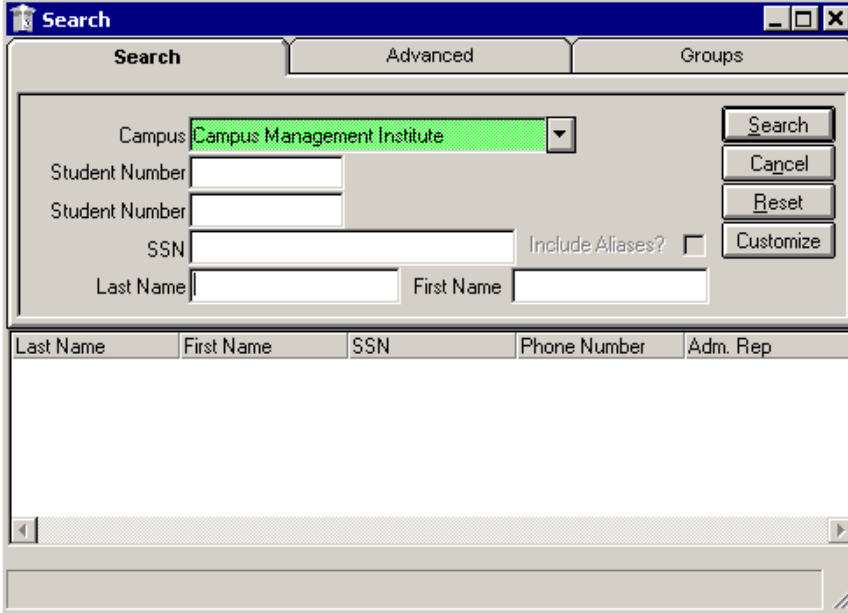
Activity Result: [Empty] Date Completed: [Empty]

Comments: Departmental Meeting Tomorrow.

Save Cancel Close

Note: The **Subject** field displays the activity name as it will appear in your Contact Manager, and this field can be edited. For example, a generic "Meeting" activity can be edited to read "Meeting re attendance," "Meeting with parents," etc. Editing the Subject field changes the way the activity will be sorted in your Contact Manager and in reports, so it is recommended that you append the customized wording rather than replace the original activity name.

- 5 Click the **Ellipsis** button  on the right of the **Student** field to open the Student Search form.

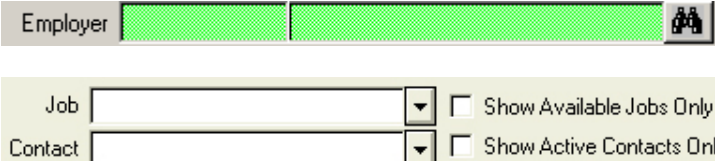


Perform a search for the student who is involved with this activity – for example, the student whom you wish to call or the student with whom you are scheduling a meeting. In the search results, double-click the required student's name to close the Search form and add the name to the Add Activity form.

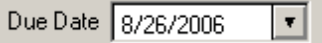
Depending on the activity you select, other fields may appear on the form. For selected Admissions activities, you may wish to indicate whether the activity should be associated with a particular enrollment or inquiry in the student's record.



Activities related to the Career Services function may be associated with an employer, job, or contact. Refer to the *Managing Career Services* user guide for more information.



Populate additional fields as required.

- 6 Type in or select a **Due Date**.  The field defaults to today's date. Click the down arrow to open a calendar to select an alternate date, or you can simply click in the field and type a date.

To make the activity appear on your **Daily Schedule**, set both a **From** and a **To** time so that the system knows what time period to highlight in the Daily Schedule view.



From 10:00 AM To 10:30 AM

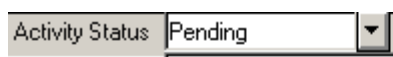
Otherwise, it is not necessary to set a time for the activity. For example, if you need a reminder to call someone at 6:00 pm, you can set the **From** time only. The activity will appear in your Contact Manager with 6:00 pm in the **Time** column, but it will not appear in your Daily Schedule.



From 06:00 PM To

Note: Here's a shortcut for entering time for activities that start on the hour: enter the hour (e.g. 1 for 1:00) followed by an "a" for A.M. or a "p" for P.M. and then tab off the field.

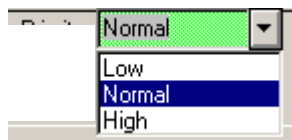
- 7 If the activity has a future Due Date, leave the **Activity Status** at the default of **Pending**. Activities assigned to you with a **Pending** status appear on the **Activities** tab of the Contact Manager, until they are moved into the **Closed** status.



Description	Code
Pending	P
Closed	C
Cancelled	X
Follow Up	F
Queued	Q
Activity Failed	FAIL
Activity Reassigned	REASSIGN

Note: You may wish to "Add" and "Close" an activity at the same time, in which case you would set the Activity Status to "Closed." For example, you may be adding a Comment activity which needs to go in the student's Contact History, but which does not need to be an open (Pending) activity in your Contact Manager.

- 8 Select the required activity **Priority**. The default is **Normal**.



Normal
Low
Normal
High

Note: The **Date Added** and **Time Added** are display-only fields maintained by the program.

- 9 Enter any **Comments** about the activity in the provided text box.

Note: Recording a **Comment** helps you to remember the pertinent facts of this transaction.

- 10 Click **Save** to save the new activity and close the Activity form.
- 11 Click **Refresh** on your Contact Manager to display the activity that has now been added to your **Activities** tab.

Priority	Contact Name	Subject	Due Date	Time	Student Phone #	Employer Phone #	Date Added	Time #
N	Utke, Deb	Follow Up Phone Call	12/14/2005		(913) 441-6782		12/14/2005	09:50
N	Smith, John A.	ADM - 1st Rescheduled Interview	1/9/2006		(954) 955-3456		1/9/2006	01:35
H	Baker, Amy / Career Schools	Employer E-Mail	1/25/2006		(555) 089-7363	(561) 555-6400	1/25/2006	01:21
N	/ American Express Corporate	Employer E-Mail	1/25/2006	07:00 AM		(954) 370-7882	1/25/2006	09:25
N	FORMTEST, T11	Change of Status Letter	2/3/2006		561-671-9876		2/3/2006	12:31
N	Cover, Steve	AM - 2nd Interview	8/26/2006	06:00 PM	(101) 023-3438		7/26/2006	02:11
N	Utke, Deb	E-mail Student	9/1/2006		(913) 441-6782		6/12/2006	10:25

Editing Activities

To make changes to an activity in your Contact Manager:

- 1 Click the activity once to highlight it and click **Edit Activity** to open the Activity form.

The screenshot shows a window titled "Activity: AM - 2nd Interview". The form contains the following fields and controls:

- Assign To:** A dropdown menu showing "Administrator, an".
- Activity:** A dropdown menu showing "AM - 2nd Interview".
- Student:** A dropdown menu showing "Comer, Steve" with a "Clear" button next to it.
- AdEnrollID:** A dropdown menu showing "<All Enrollments>".
- Inquiry:** A dropdown menu showing "<All Inquiries for Student>".
- Subject:** A dropdown menu showing "AM - 2nd Interview".
- Due Date:** A date field showing "8/26/2006".
- From:** A time field showing "06:00 PM".
- To:** A time field.
- Date Added:** A date field showing "7/26/2006".
- Time Added:** A time field showing "02:11 PM".
- Activity Status:** A dropdown menu showing "Pending".
- Priority:** A dropdown menu showing "Normal".
- Activity Result:** A dropdown menu.
- Comments:** A large text area for entering comments.
- Buttons:** "Save", "Cancel", and "Close" buttons at the bottom.

- 2 Edit the information as required.
- 3 Click **Save** to save your changes and close the Activities form.

Closing Activities

Closing an activity is the equivalent of “checking it off your to-do list.” It allows you to document the results of the activity and sets the status of the activity to **Closed**, removing it from your Contact Manager. At the same time, it updates the activity in the Contact History folder of the student (or employer) with whom it was associated.

To close an activity in your Contact Manager:

- 1 Click the activity to highlight it and click **Close Activity** to open the Close Activity form.

The screenshot shows the 'Close Activity' window. It has a title bar with a folder icon and the text 'Close Activity'. Inside, there are several input fields: 'Student' with the value 'Cairns, Kathy', 'Subject' with 'Follow Up Phone Call re appt reminder', and 'Comments' with 'reminder: interview 7/27/06 2pm'. Below these is an 'Activity Result' dropdown menu currently showing 'Call Completed'. Then is a 'Date Completed' dropdown showing '7/26/2006'. There are two checkboxes: 'Change Student Status' with a dropdown showing 'New Lead', and 'Update Application Status' with a dropdown showing 'Not Requested'. Below these are 'Date Requested' and 'Date Received' fields, both with calendar icons. At the bottom are four buttons: 'Call Script', 'Save and Follow Up', 'Save', and 'Cancel'.

This form contains some of the information you entered when you first added this activity to your Contact Manager.

- 2 The **Comments** field is active, so you can add comments as required.

Note: Recording a **Comment** helps you to remember the pertinent facts of this transaction.

- 3 Review the default **Activity Result** (if any) and edit as required.
- 4 The **Date Completed** defaults to the system date. Edit as required.
- 5 Your business practices will determine whether this activity warrants a change to the student’s school status or application status (if you have the necessary permissions). If so, enable the check box to the left of a **Change** or **Update** caption; next, select the new status for the student from the drop-down list and complete any additional fields.

- 6 Your business practices will determine whether this activity warrants a change to the student application status. If so, check the **Update Application Status** box and select the new status from the drop down list. Update the date fields as required.
- 7 Click **Save and Follow Up** to open the Activity: Follow Up form and add a follow-up activity for the same student. Complete the information on the form regarding your next activity with the student in the same manner as you would to add a new activity.

The screenshot shows a software window titled "Activity: Follow up: ADM - 2nd Rescheduled 2nd Interview". The form contains the following fields and controls:

- Assign To:** A dropdown menu with "Administrator, an" selected.
- Activity:** A dropdown menu with a green bar.
- Student:** A text field with "Atmann, Ronald" and a "Clear" button.
- Enroll:** A dropdown menu with "<All Enrollments>" selected.
- Inquiry:** A dropdown menu.
- Job:** A dropdown menu.
- Show Available Jobs Only:** An unchecked checkbox.
- Contact:** A dropdown menu.
- Show Active Contacts Only:** An unchecked checkbox.
- Subject:** A dropdown menu with "Follow up: ADM - 2nd Rescheduled 2nd Interview" selected.
- Due Date:** A date field with "7/25/2005".
- From:** A dropdown menu.
- to:** A dropdown menu.
- Date Added:** A text field.
- Time Added:** A text field.
- Activity Status:** A dropdown menu with "Pending" selected.
- Priority:** A dropdown menu with "Normal" selected.
- Save Follow Up:** A button.
- Cancel:** A button.

- 8 After completing the Activity: Follow Up form, click **Save Follow Up** to save the follow-up activity. This new activity, which is in the **Pending** activity status, is added to the **Activities** tab on the Contact Manager.


Note: Closing an activity without scheduling a follow-up activity removes the activity, and the associated contact name from your Contact Manager. Only activities with a status of **Pending** are shown on the **Activities** tab in Contact Manager.

Modify Batch Activities

You can use the Modify Batch Activities wizard to change, delete, or update activities, activity type, and/or activity status in batch mode. The Modify Batch Activities wizard also allows you to reassign activities to additional employees.

To modify activities in a batch mode:

- 1 Select **Daily > Contact Manager > Modify Batch Activities** to open the Modify Batch Activities wizard.

- 2 Select the applicable option(s) from Step 1.
 - **Campus:** Lists campuses that you have access to and by default opens your logged-in campus.
 - **Student:** Allows you to select a student. Click the ellipse  button next to this field to open the Student Search form.
 - **Activity:** Lists activities you have access to and that are associated with your campus and Contact Manager policy.
 - **Activity Category:** Lists all active activity categories.
 - **Assigned To:** Lists the employee details you have access to.
 - **Activity Status:** Lists the status of all active activities.
 - **Activity Due Date:** Allows you to select any date.
 - **Activity Result:** Lists all active results that can be assigned to an activity.
 - **Activity Limit:** Specifies the maximum number of activities that should be listed. The default value is 1,000.

- 3 Click **Next**. Step 2 displays the activities that were gathered by your selection options in Step 1.

Modify Batch Activities - Campus Management Institute

The following activity(s) meet your selection criteria. Select activity(s) to continue:

Step 2 of 5

Selection Criteria Specified
Campus: Campus Management Institute ; Activity: ADM - Tot Rescheduled Interview

Select	Contact Name	Subject	Assigned To	Due Date	Activity Type	Activity Status	Act
<input type="checkbox"/>	Smit, John	ADM - Tot	Able Baker	05/06/2005	Meeting	Closed	Net

Select All Clear All

1 activity(s) found

Cancel << Back Next >>

- 4 Select the activities to be modified and click **Next** to go to Step 3.

Modify Batch Activities - Campus Management Institute

Select modification options below:

Step 3 of 5

Selection Criteria Specified
Campus: Campus Management Institute ; Activity: ADM - Tot Rescheduled Interview

Select Reassign Activity Option

☐ Reassign Activity(s) to Other Staff Member(s)

Select Options to Modify

☐ Activity Status: [dropdown]
Activity Result: [dropdown] Date Completed: [dropdown]
☐ Activity Due Date: [dropdown]

☐ Reset Priority of the Selected Activities
Priority: [dropdown]

Modifying the activities selected may result in the criteria for configured scheduled activities being met. If this occurs specify whether or not you wish to proceed with creating the scheduled activity.
☐ Do Not Create Triggered Activity (if applicable)

1 activity(s) selected for modification

Cancel << Back Next >>

- 5 Select at least one of the following options in Step 3.
- **Reassign Activity(s) to Other Staff Member(s):** Allows you to reassign the activity to other employees. When you select this check box, a message appears stating “You may specify other criteria and/or click Next to specify staff members to reassign activities to.”
 - **Activity Status:** Lists all active activity statuses.

<input checked="" type="checkbox"/> Activity Status	<div style="border: 1px solid black; background-color: #90EE90; padding: 2px;"> </div>
Pending	P
Closed	C
Cancelled	X
Follow Up	F
Queued	Q
Activity Failed	FAIL

- **Activity Result:** This option is enabled only when you select the **Closed** option in the **Activity Status** drop-down list. The list displays only those activity results that are associated with the TaskType when the filtered activities have the same CmEventType.TaskType.
 - **Date Completed:** Allows you to select a date.
 - **Activity Due Date:** Allows you to select a date.
 - **Reset Priority of the Selected Activities:** Enables the **Priority** drop-down list and allows you to reset the priority of the selected activities.
 - **Priority:** Lists three static values: **Low**, **Normal**, and **High**.
 - **Do Not Create Triggered Activity (if applicable):** Specifies whether to create triggered activities or not.
- 6 Click **Next**. Step 4 of the wizard depends on the selections you made in Step 3. If you checked the **Reassign Activity(s) to Other Staff Member(s)** box in Step 3, a list of staff members appears in Step 4, from which you may select the members to reassign activities. If you did not select the **Reassign Activity(s) to Other Staff Member(s)** check box, Step 5 of the wizard will appear.

Modify Batch Activities - Campus Management Institute

Step 4 of 5

Select Staff Members to Reassign Activities

Selection Criteria Specified: Campus: Campus Management Institute : Activity: ADM - 1st Rescheduled Interview

Modification Option(s) Selected: Status = Pending, Due Date = 5/7/2008

Select	Staff Member	Map
<input type="checkbox"/>	Adden, Joy	
<input type="checkbox"/>	Autor, James	
<input type="checkbox"/>	Baker, Able	
<input type="checkbox"/>	Bankard, Cindy	
<input type="checkbox"/>	Barton, Charity	
<input type="checkbox"/>	Beancounter, Dee	
<input type="checkbox"/>	Bellows, Albert	
<input type="checkbox"/>	Blindler, Spaky	
<input type="checkbox"/>	Booth, John W.	
<input type="checkbox"/>	Boggs, Lucrecia	
<input type="checkbox"/>	Brazz, Porceno	
<input type="checkbox"/>	Bucket, Iva	
<input type="checkbox"/>	Burton, P.	
<input type="checkbox"/>	Campbell, A	
<input type="checkbox"/>	Dudley, Charles	
<input type="checkbox"/>	Epps, Jay	

Select All Clear All ☐ Reassign activities equally among the selected staff members

1 activity(s) selected for modification

Cancel << Back Next >>

- 7 Select the **Reassign activities equally among the selected staff members** check box, if desired.
- 8 Click **Next** to go to Step 5. Your selections will appear at the top of the screen. Add comments that you would like to make in the **Comments** field.

Modify Batch Activities - Campus Management Institute

Select Finish to Confirm

Step 5 of 5

Selection Criteria Specified
 Campus: Campus Management Institute ; Activity: ADM - 1st Rescheduled Interview

Modification Option(s) Selected
 Status = Pending
 Due Date = 5/7/2008

Contact name	Subject	Assigned To	Due Date	Activity Type
Smith, John	ADM - 1st Rescheduled	Able Baker	05/05/2008	Meeting

Comments

1 activity(s) selected for modification

Print Cancel << Back Finish

- 9 Click **Print** to print Delete/Modify Batch Activity Report.

Delete/Modify Batch Activity Report rpt_CmBatchActivities.rpt ADMINISTRATOR

Selection Criteria :
 Campus: Campus Management Institute ; Activity: ADM - 1st Rescheduled Interview

Modification Criteria :
 Status = Pending
 Due Date = 5/7/2008
 Priority = High

Reassign Activity to Other Staff Member(s) = Adden, Joy; Asar, James; Baker, Able

Assigned To	Due Date	Date Completed	Activity	Type	Status	Reassign	Priority
Able Baker	05/05/2008	05/05/2008	ADM - 1st Rescheduled Interview	Meeting	Closed	Meeting Given	Normal

- 10 Click **Finish**. The system will ask if you want to proceed without printing the report, if you have not already printed it.

CampusVue

?

All activities selected will be updated with the specified changes.
 Are you sure you want to proceed without taking a print?

Yes No

- 11 Click **Yes** to continue processing or **No** to return to the previous screen. If you click **Yes**, a confirmation message informs you that the selected activities were modified. Click **OK**.

CampusVue

Selected activity(s) have been modified.

OK

Delete Batch Activities

Schools can use the Delete Batch Activities wizard to batch-delete activities that were added to student records erroneously or to remove undeliverable e-mail messages from an employee's Contact Manager.

To delete activities in the batch mode:

1. Select **Tools > Contact Manager > Delete Batch Activities** to open the Delete Batch Activities wizard. Select the applicable options from Step 1.

2. Click **Next** to go to Step 2 and select the activities to be modified.

Select	Contact Name	Subject	Assigned To	Due Date	Activity Type	Activity Status	Act
<input checked="" type="checkbox"/>	Smith, John	ADM - 1st	Able Baker	05/07/2008	Meeting	Pending	Met

3. Click **Next** to go to Step 3. Your selections will appear at the top of the screen.

Delete Batch Activities - Campus Management Institute

Select Finish to Confirm

Step 3 of 3

Selection Criteria Specified

Campus: Campus Management Institute ; Activity: ADM - 1st Rescheduled Interview

Contact name	Subject	Assigned To	Due Date	Activity Type
Smith, John	ADM - 1st Rescheduled	Able Baker	05/07/2008	Meeting

1 activity(s) selected for deletion

Print Cancel << Back Finish

- Click **Print** to print the Delete/Modify Batch Activity Report.

Delete/Modify Batch Activity Report rpt_CmBatchActivity.rpt
ADMINISTRATOR

Campus: Campus Management Institute ; Activity: ADM - 1st Rescheduled Interview

Assigned To	Due Date	Date Completed	Activity	Type	Status	Result	Priority
Able Baker	05/07/2008	05/06/2005	ADM - 1st Rescheduled Interview	Meeting	Pending	Meeting Given	High

- Click **Finish** to delete the selected activities. If you click **Finish** without printing the report, the following message will appear. Click **Yes** to continue deleting the selected activities without printing a report or **No** to return to the previous screen to print the report.

CampusVue

WARNING! The selected activities will be permanently deleted from the database. Are you sure you want to proceed without taking a print?

Yes No

- If you click **Finish** after printing the report, the system confirms the deletion. Click **OK**.

CampusVue

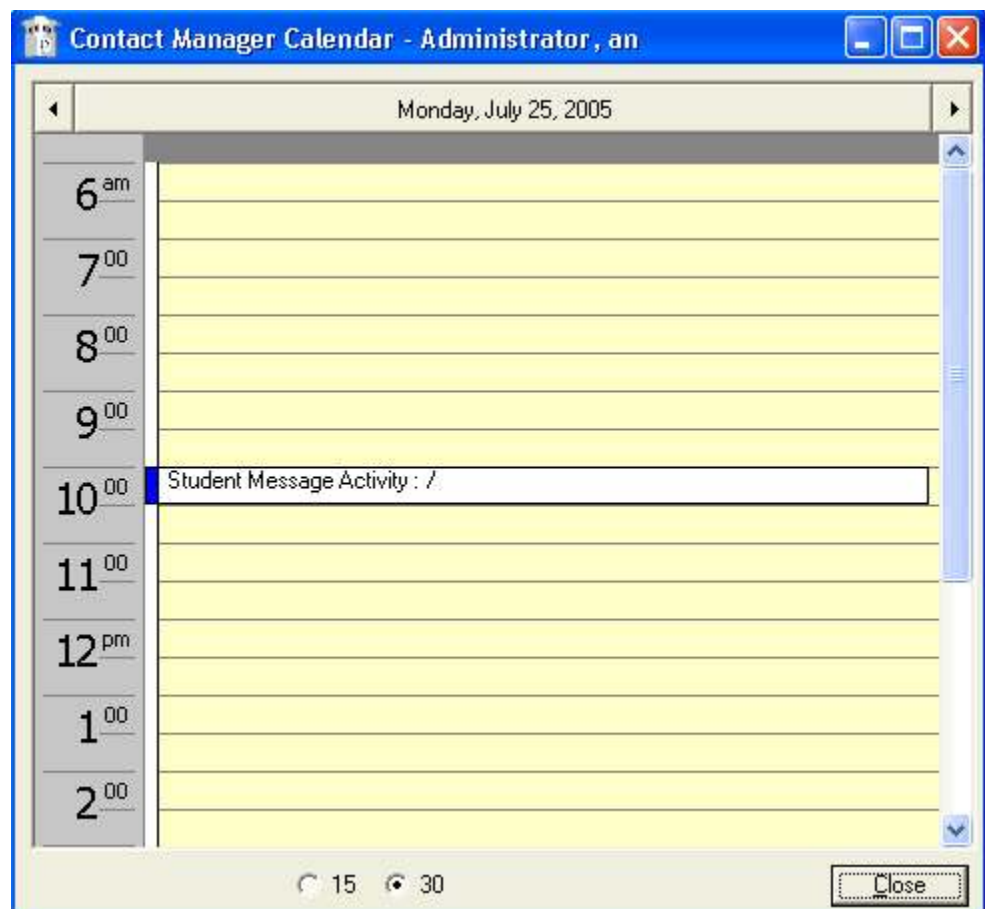
Selected activity(s) have been deleted.



OK

Daily Schedule

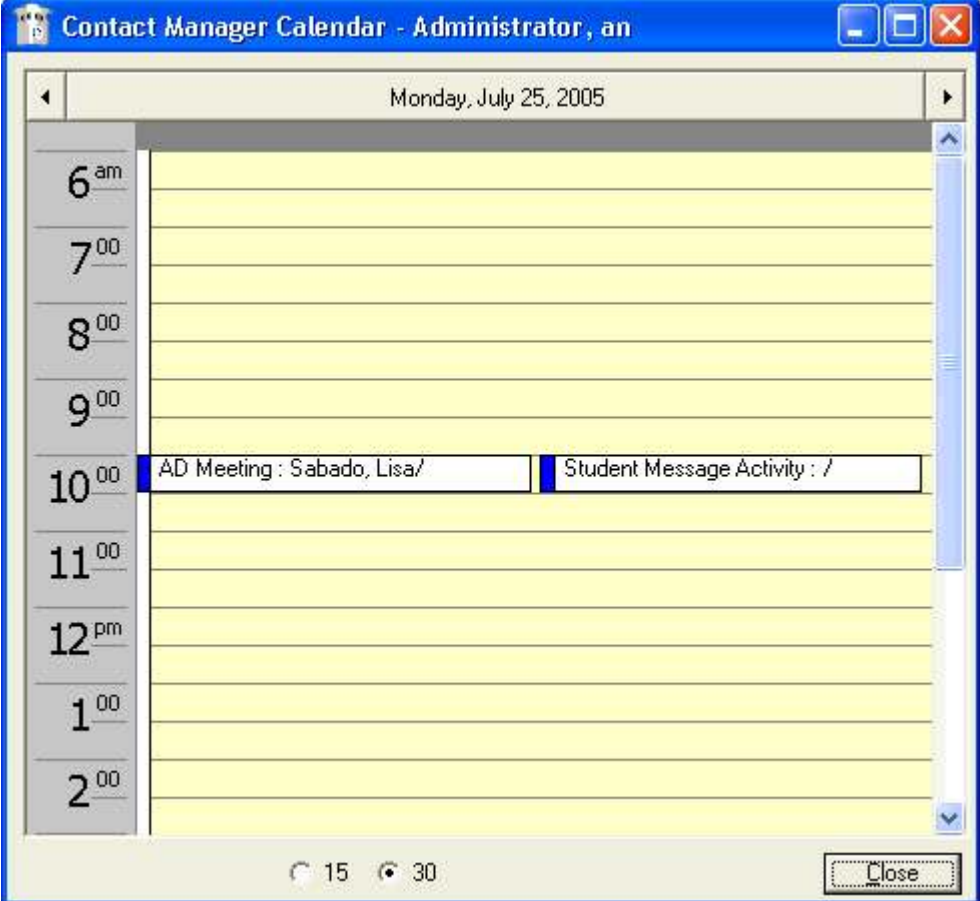
To view your daily schedule in Contact Manager:

- 1 Click **Daily Schedule** on the Contact Manager to see a calendar view of your activities. If an activity has both a **From** and **To** time, it appears as a color-blocked portion of your daily schedule.



- 2 Select **15** to divide the day in 15-minute increments or select **30** to divide the day in 30-minute increments.
- 3 Click  to shift the calendar day to an earlier date. Click  to shift the calendar to a later date.

Contact Manager allows you to double-book your time. The **Contact Manager Calendar** shows a separate **Activity Box** for each appointment.



The image shows a screenshot of a software window titled "Contact Manager Calendar - Administrator, an". The window displays a daily schedule for Monday, July 25, 2005. The schedule is organized into a grid with time slots on the left, ranging from 6 am to 2:00 pm. The 10:00 slot is highlighted with a blue background and contains two entries: "AD Meeting : Sabado, Lisa/" and "Student Message Activity : /". At the bottom of the window, there are radio buttons for "15" and "30", and a "Close" button.

Note: You can double-click a time in your Daily Schedule to open an **Activity** form that has the time pre-selected.

Letters and Mail Merges

In this section, you will learn:

- How to create new letter activities.
- How to add a letter activity for a student or employer.
- How to print or clear the letters manually.

Letter Activity

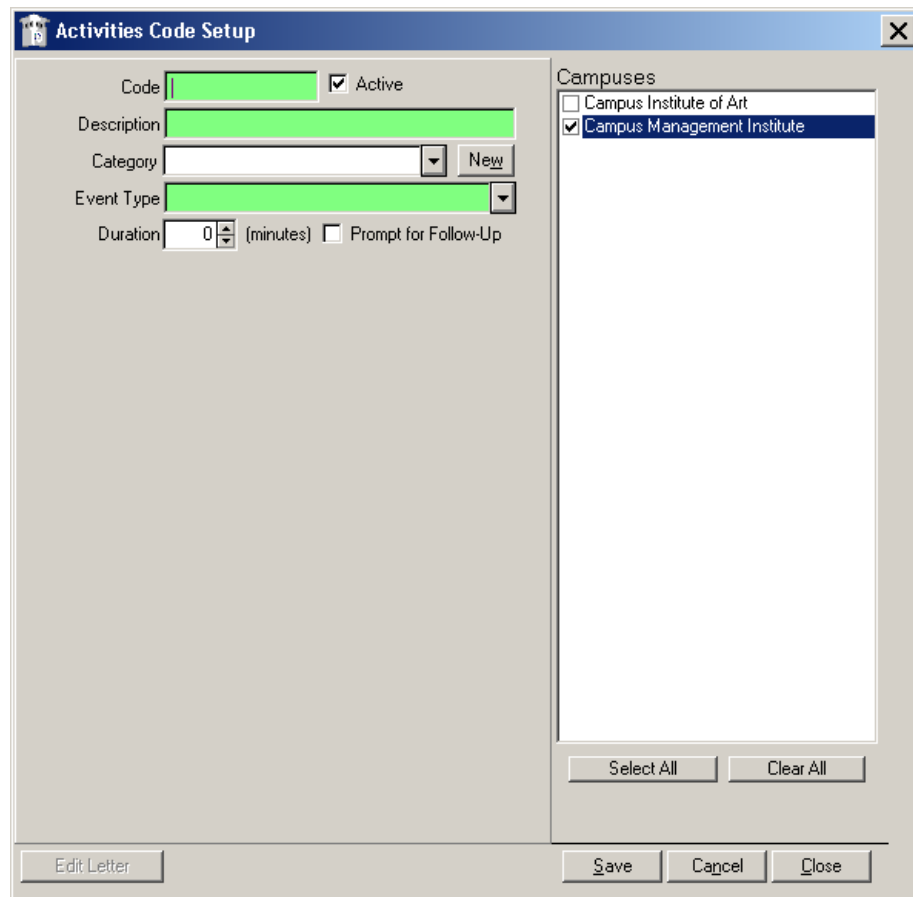
Letter activities are set up to send form letters to one or more students or employers. The form letters can be set up to include attachments, such as catalogs, brochures, and forms. The form letters can also be set up with "linked" letters or documents such as mailing labels that will be printed at the same time as the form letter. The attached and linked documents are specified at the time the letter activity is defined. After the form letter has been defined, you can add it to a student or an employer through the Activities form in Contact Manager.

To create a new letter activity:

1. Click **Lists > Contact Manager** to open the Setup - Contact Manager Lists [Activities] form.

Description	Code	Active
Lead Interview	LEADINT	Y
Entrance Interview	ENTRANCE	Y
Exit Interview	EXIT	Y
Graduate Interview w/ Employer	EMPINT	Y
New Lead Phone Call	NEWLEAD	Y
HSAS Phone Call	HSASCALL	Y
Student Outgoing Phone Call	SCALLOUT	Y
Send Student to FAQ for Interview	FA	Y
Telephoning	TM	Y
Staff Meeting	STAFFM	Y
Welcome Packet	WELCOME	Y
Employer Phone Call	EMPCALL	Y
Employer Letter New	EMPLETN	Y
Employer Incoming Phone Call	EMPCAL	Y
Employer Meeting	EMPMET	Y
Employer E-Mail	EMPMAIL	Y
Employer Message	EMPMES	Y
Employer Other Task	EMPOTH	Y
Student Other Task	STUOTH	Y
Student Incoming Phone Call	SCALLIN	Y
Student Meeting	STUMET	Y
Student Message Activity	STUMES	Y
Student Letter	STULET	Y
E-mail Student	EMAILSTU	Y
E-Mail Staff	EMSTAFF	Y

2. Click the **Activities** tab to open a list of existing activities.
3. Click **Add** to open the Activities Code Setup form or select a previously added activity and click **Edit** to work with it.



The **Activities Code Setup** dialog box is used to configure activity codes. It includes fields for Code, Description, Category, Event Type, and Duration, along with an **Active** checkbox and a **Prompt for Follow-Up** checkbox. A **Campuses** list on the right allows selecting the applicable campus. Buttons for **Select All**, **Clear All**, **Edit Letter**, **Save**, **Cancel**, and **Close** are provided.

Code ☒ **Active**

Description

Category **New**

Event Type

Duration (minutes) ☐ **Prompt for Follow-Up**

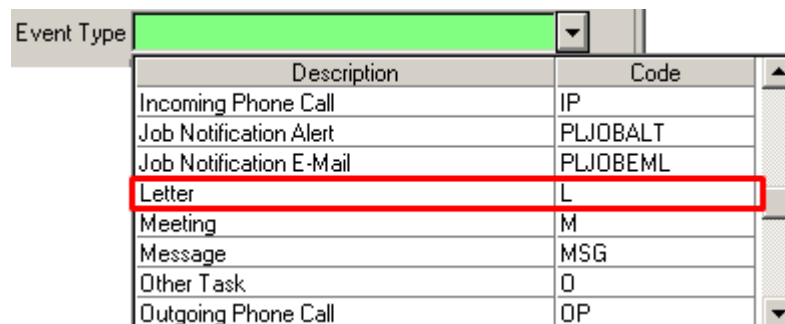
Campuses

- ☐ Campus Institute of Art
- ☒ Campus Management Institute

Select All **Clear All**

Edit Letter **Save** **Cancel** **Close**

4. Enter the required information in the **Code** and **Description** fields.
5. Select a category from the **Category** box or click **New** to add a new activity category record.
6. Select **Letter** from the **Event Type** list.



The **Event Type** dropdown menu is open, showing a list of activity types. The **Letter** option is highlighted with a red box.

Description	Code
Incoming Phone Call	IP
Job Notification Alert	PLJOBALT
Job Notification E-Mail	PLJOBEML
Letter	L
Meeting	M
Message	MSG
Other Task	O
Outgoing Phone Call	OP

7. Select the advisor from the **From Advisor** list (if applicable).

From Advisor

- Academic Records
- Admissions
- Career Services
- Financial Aid
- International
- Loan Management
- Other - ADMIN : System Administrators
- Other - ATHLETIC : Athletic Advisor

- Select the applicable options within the **Contacts**, **Jobs**, **Employer Contact**, and **Org. Contact** tabs.

Contacts Jobs Emp Contact Org. Contact

Contacts for this Activity

Student ☒ Required ☐ Optional

Employer ☐ Required ☒ Optional

Organization ☐ Required ☒ Optional High School ...

- Select at least one campus from the **Campuses** list. Click **Select All** to select all campuses or **Clear All** to uncheck all the campuses from the list.

Activities Code Setup

Code **STUDLET** ☒ Active

Description **Student Letter for interview**

Category ... New

Event Type **Letter**

Duration 0 (minutes) ☐ Prompt for Follow-Up

From Advisor Admissions ...

Contacts Jobs Emp Contact Org. Contact

Contacts for this Activity

Student ☒ Required ☐ Optional

Employer ☐ Required ☒ Optional

Organization ☐ Required ☒ Optional High School ...

Send To ...

Attachments/Documents

Linked Letters

Campuses

- ☐ Campus Institute of Art
- ☒ Campus Management Institute

Select All Clear All

Edit Letter Save Cancel Close

- Select a recipient from the **Send To** drop down list.

Send To

- Student
- Employer
- Organization

11. The **Send to Address** field will only appear if you select **Student** from the **Send To** drop down list and the **Event Type** is **Letter**. If you wish the letter to go to the address in the Student Master form, you can leave this field blank. Otherwise, you can select an alternate address from this list (provided the address is the student's Addresses folder).

Send to Address

Description	Code
Billing Address	BILLING
Cousin of student	COUSIN
Emergency	EMER
Employer	EMPLOYER
Employer 2	EMP2
Future	FUT
Grade Delivery	GRAD
Parent	PARENT

12. Click **Save** to save your new activity.
13. Click **Attachments/Documents** button if you want to create a list of attachments or other documents that are to be packaged with the letter and sent to the recipient. If you print the Activities Code list, the **Attachments/Documents** associated with each letter will also be listed.

Note: The **Attachments/Documents** button does not show on a new Activity form until you click **Save**.

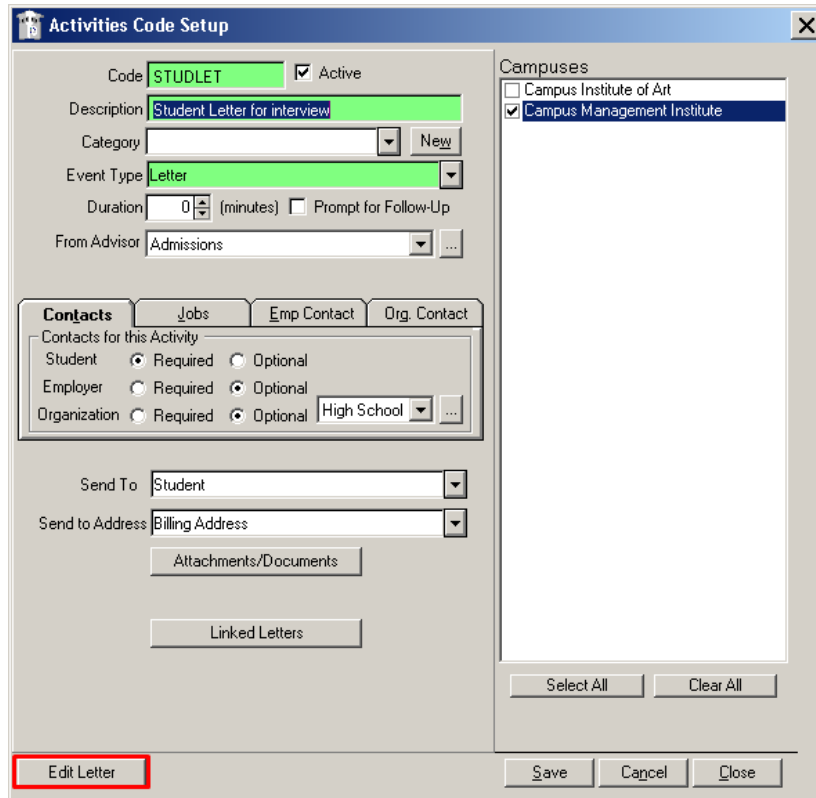
Attachments/Documents List

Letter: Student Letter for interview

Code	Description
NEWDOC	New Document

Add Remove Save Cancel Close

14. Click **Edit Letter** to create or edit the form letter you are setting up. The program will open Microsoft Word in a blank document whose file name is based on the code you entered in the Activities setup procedure.



Activities Code Setup

Code: **STUDLET** ☒ Active

Description: **Student Letter for interview**

Category: **New**

Event Type: **Letter**

Duration: (minutes) ☐ Prompt for Follow-Up

From Advisor: **Admissions**

Contacts Jobs Emp Contact Org. Contact

Contacts for this Activity

Student ☒ Required ☐ Optional

Employer ☐ Required ☒ Optional

Organization ☐ Required ☒ Optional **High School**

Send To: **Student**

Send to Address: **Billing Address**

Attachments/Documents

Linked Letters

Campuses

☐ Campus Institute of Art

☒ **Campus Management Institute**

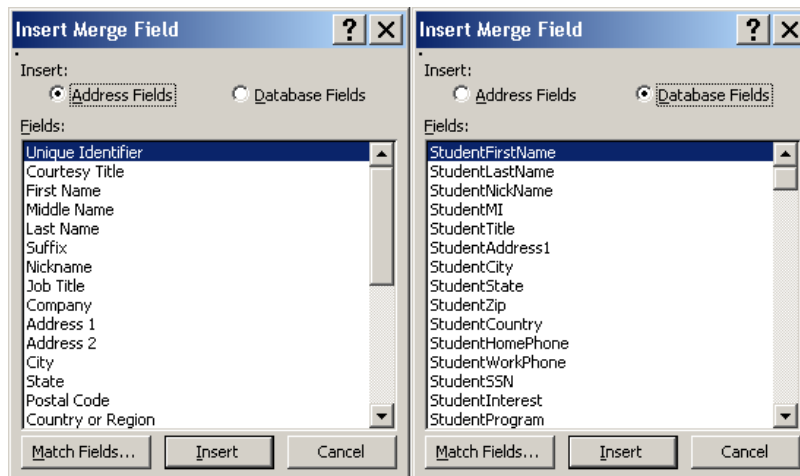
Select All **Clear All**

Edit Letter **Save** **Cancel** **Close**

15. To insert a merge field in your letter click **Insert Merge Field** on the Word toolbar. The list of merge fields will drop down. Click the field on the list and it will be inserted in the letter.



You can select **Address** and **Database** fields.



Insert Merge Field

Insert: ☒ Address Fields ☐ Database Fields

Fields:

- Unique Identifier
- Courtesy Title
- First Name
- Middle Name
- Last Name
- Suffix
- Nickname
- Job Title
- Company
- Address 1
- Address 2
- City
- State
- Postal Code
- Country or Region

Match Fields... **Insert** **Cancel**

Insert Merge Field

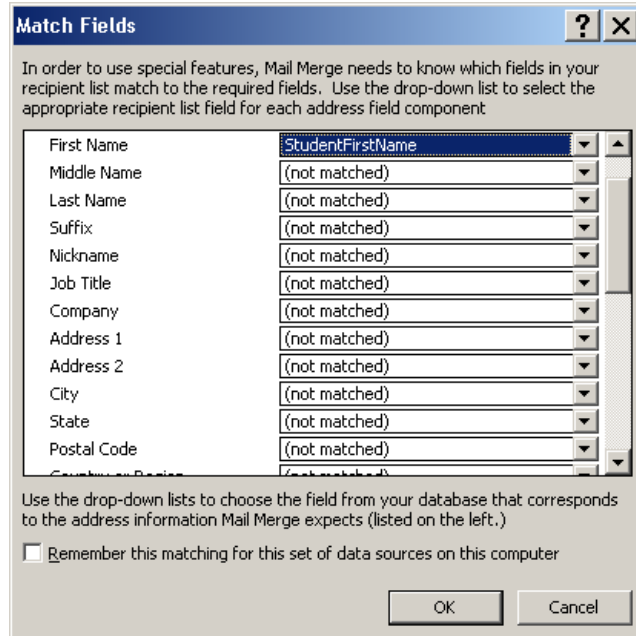
Insert: ☐ Address Fields ☒ Database Fields

Fields:

- StudentFirstName
- StudentLastName
- StudentNickName
- StudentMI
- StudentTitle
- StudentAddress1
- StudentCity
- StudentState
- StudentZip
- StudentCountry
- StudentHomePhone
- StudentWorkPhone
- StudentSSN
- StudentInterest
- StudentProgram

Match Fields... **Insert** **Cancel**

16. The Match Fields form will appear when you select the **Match Fields** button. Click the down arrow next to your database field that you would like to associate with the mail merge field displayed on the left hand side of the screen. A list of database fields will appear that you can select for each mail merge field listed. Click **OK** when all of your selections are made.

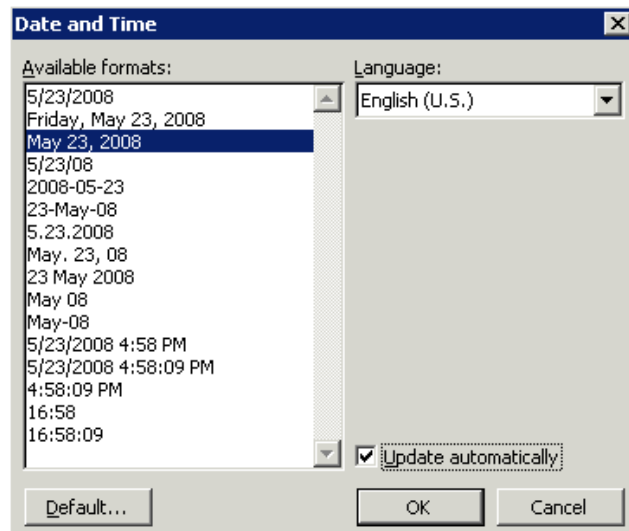


The **Match Fields** dialog box is used to map database fields to mail merge fields. It contains a list of mail merge fields on the left and a list of database fields on the right. The 'First Name' field is currently mapped to 'StudentFirstName'. All other fields are currently marked as '(not matched)'. At the bottom, there is a checkbox for 'Remember this matching for this set of data sources on this computer' and 'OK' and 'Cancel' buttons.

Mail Merge Field	Database Field
First Name	StudentFirstName
Middle Name	(not matched)
Last Name	(not matched)
Suffix	(not matched)
Nickname	(not matched)
Job Title	(not matched)
Company	(not matched)
Address 1	(not matched)
Address 2	(not matched)
City	(not matched)
State	(not matched)
Postal Code	(not matched)

NOTE: Remember to allow spacing around and between your merge fields to correspond to the desired spacing in your letter. For example, if your letter is to be printed on school stationery, you might wish to allow additional blank rows at the top to accommodate your letterhead.

For business letters, select **Insert > Date and Time** and select your desired date format. Check the "Update automatically" box so that your letter will have the current date each time you use it.



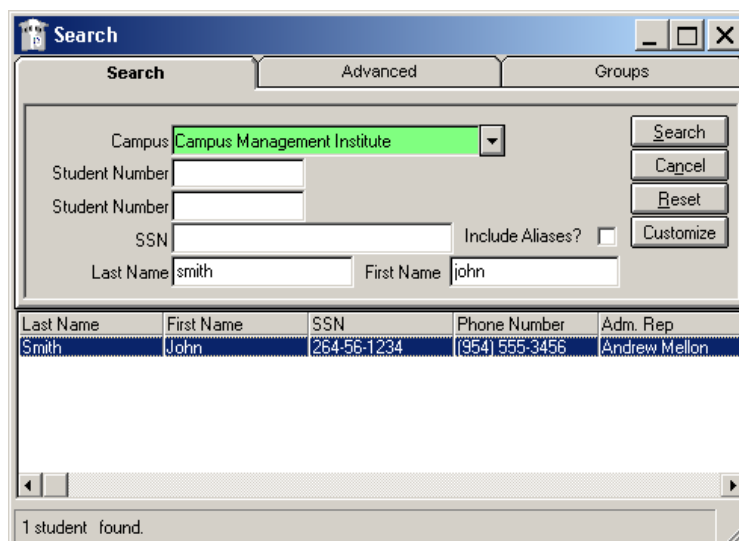
The **Date and Time** dialog box allows users to select a date and time format and language. The 'Available formats' list includes various date and time formats, with 'May 23, 2008' selected. The 'Language' dropdown is set to 'English (U.S.)'. There is a checkbox for 'Update automatically' which is checked. At the bottom, there are 'Default...', 'OK', and 'Cancel' buttons.

Available formats	Language
5/23/2008	English (U.S.)
Friday, May 23, 2008	
May 23, 2008	
5/23/08	
2008-05-23	
23-May-08	
5.23.2008	
May. 23, 08	
23 May 2008	
May 08	
May-08	
5/23/2008 4:58 PM	
5/23/2008 4:58:09 PM	
4:58:09 PM	
16:58	
16:58:09	

17. After you finish composing your form letter, **Save** your letter in Word. Then **Exit** from the Word program. You will return to the Activities Code Setup form.
18. Click **Save** to save your new activity or changes to an existing activity.
19. Click **Cancel** to cancel any changes that you made on the form.
20. Click **Close** to close the Activity Code Setup form.

To add a letter activity for a selected student:

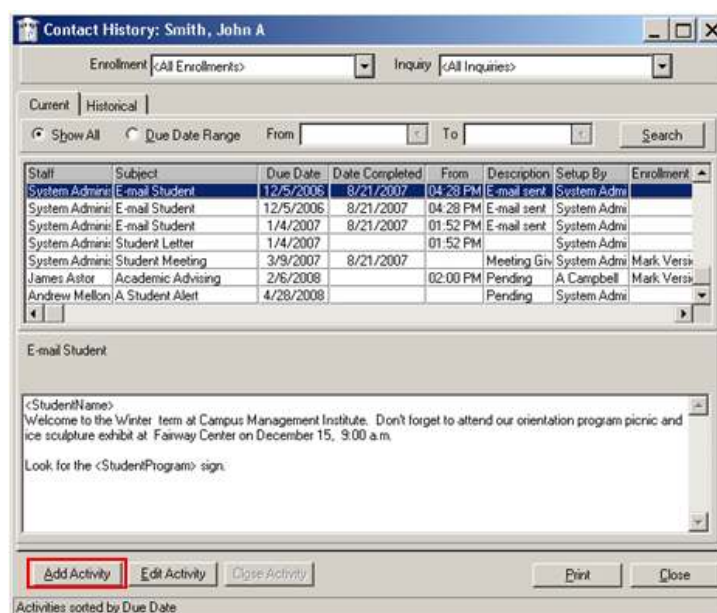
1. Click **Find > Student** to find the student for whom you wish to add a letter activity.



Last Name	First Name	SSN	Phone Number	Adm. Rep
Smith	John	264-56-1234	(954) 555-3456	Andrew Mellon

1 student found.

2. Click **View > Contact Manager > Activities** to open the Contact History form for the selected student.



Staff	Subject	Due Date	Date Completed	From	Description	Setup By	Enrollment
System Admin	E-mail Student	12/5/2005	8/21/2007	04:28 PM	E-mail sent	System Admin	
System Admin	E-mail Student	12/5/2006	8/21/2007	04:28 PM	E-mail sent	System Admin	
System Admin	E-mail Student	1/4/2007	8/21/2007	01:52 PM	E-mail sent	System Admin	
System Admin	Student Letter	1/4/2007		01:52 PM		System Admin	
System Admin	Student Meeting	3/9/2007	8/21/2007		Meeting Given	System Admin	Mark Versi
James Astor	Academic Advising	2/6/2008		02:00 PM	Pending	A Campbell	Mark Versi
Andrew Mellon	A Student Alert	4/28/2008			Pending	System Admin	

E-mail Student

<StudentName>
Welcome to the Winter term at Campus Management Institute. Don't forget to attend our orientation program picnic and ice sculpture exhibit at Fairway Center on December 15, 9:00 a.m.
Look for the <StudentProgram> sign.

Add Activity Edit Activity Close Activity Print Close

Activities sorted by Due Date

- Click **Add Activity** to open the Activity form.

Activity:

Assign To: System Administrator

Activity: [Green Bar]

Student: Smith, John A [Clear]

Enroll: Mark Version 1 Inquiry: <All Inquiries for Student>

Job title: [] ☒ Show Available Jobs Only

Company contact: [] ☒ Show Active Contacts Only

Subject: [Green Bar]

Due Date: 5/19/2008 From: [] To: []

Date Added: [] Time Added: []

Status: Pending Priority: Normal

Activity Result: [] Date Completed: []

Comments: [Large Text Area]

Save Cancel Close

- Check the **Assign To** box to be sure that the name of person responsible for the letter activity is displayed.
- In the **Activity** list, select a letter activity.

Activity	
[Green Bar]	
Description	Code
Send Student to FAO for Interview	FA
SMS for postponement of exams	SMSPPOST
Staff Meeting	STAFFM
Student Alert	STUDALRT
Student Incoming Phone Call	SCALLIN
Student Job Interest Notification	JOBINT
Student Letter	STULET
Student Letter for interview	STUDLET

6. Click the activity to add it to the form. The activity now appears in both the **Activity** field and the **Subject** field.

7. Check the **Student** box to be sure the name of the correct student appears, or you can click the search button to find another student.

8. By default, the current date appears in the Due Date box. For letter activities, the Due Date is the first date that this letter will be available to be printed. Click the **Due Date** arrow to open a calendar and select an alternate date, or you can click in the field and type a date.

9. If the activity has a future due date, retain the default value, **Pending**, in **Activity Status**.

Description	Code
Pending	P
Closed	C
Cancelled	X
Follow Up	F
Queued	Q
Activity Failed	FAIL
Activity Reassigned	REASSIGN

10. Select the required value in the **Priority** box. The default activity priority value is **Normal**.

Priority: Normal

- Low
- Normal
- High

- Enter any comments about the activity in the **Comments** text box. These comments do not appear in the letter.

Comments

Save Cancel Done

- Click **Save** to save your changes.

Print/Clear Letters

You must configure letter activities before you can print form letters in a batch mode. You can then print the batch letters manually.

To print student letters manually:

- Click **Daily > Contact Manager > Letters** or **Daily > Career Services > Print Employer Letters** to open the Print Letters form.

Print Letters

Campus: Campus Management Institute

Description	Code	# to Print
Admissions Label	ADM LAB	1
Adm New Institutional	ADM NLI	1
Adm New Lead Label	ADM NL	2
Change of Status Letter	CHAGSTST	6
Lead Interview	LEADINT	5
Student Letter	STULET	1
Student Letter by Campus	STULET	1
Student Outgoing Phone Call	SCHLLOUT	50

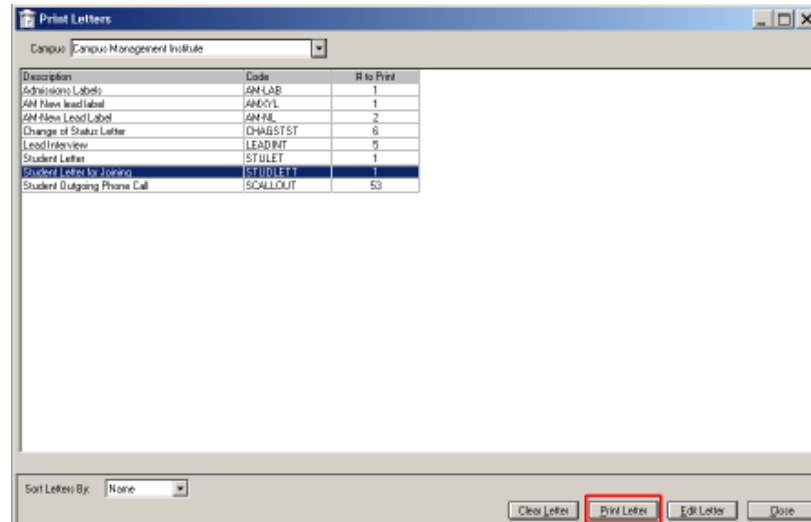
Sort Letters By: None

Clear Letters Print Letters Edit Letter Done

- From the **Campus** box, select the campus for which the letters are to be printed. CampusVue displays only the campuses to which you have access. Even if you select All Campuses, you receive letters only for the campuses to which you have access. In addition, only active letters are visible.

Note: The Due Date on the letter activity determines the first date that the letter appears in the letters queue and is available to print.

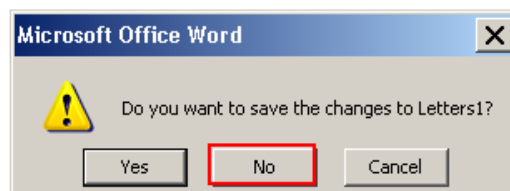
3. Select a form letter from the list.
4. Click **Print Letter** to launch Microsoft Word with the name of the letter file.



5. When Word is fully opened, it will display your letters one after the other with the data from the student or employer database merged with the form letter.

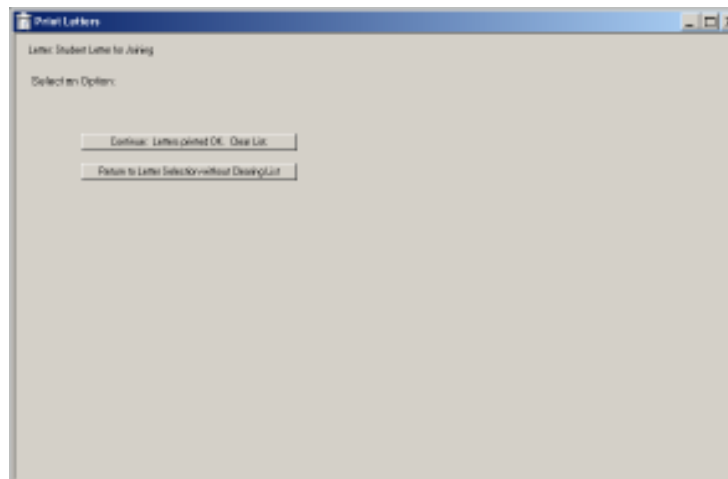


6. Review the letters and use the normal Word print functions to print your letters.
7. After you finish printing your form letter, **Exit** from the Word program. Word will ask if you want to save the changes you made to the Form Letters file. This is the merged letter file. Select No.



8. You are now left with the original letter template that contains the merge codes. You may edit it at this time or close without editing. Say **Yes** or **No** to the Save Changes option as required.

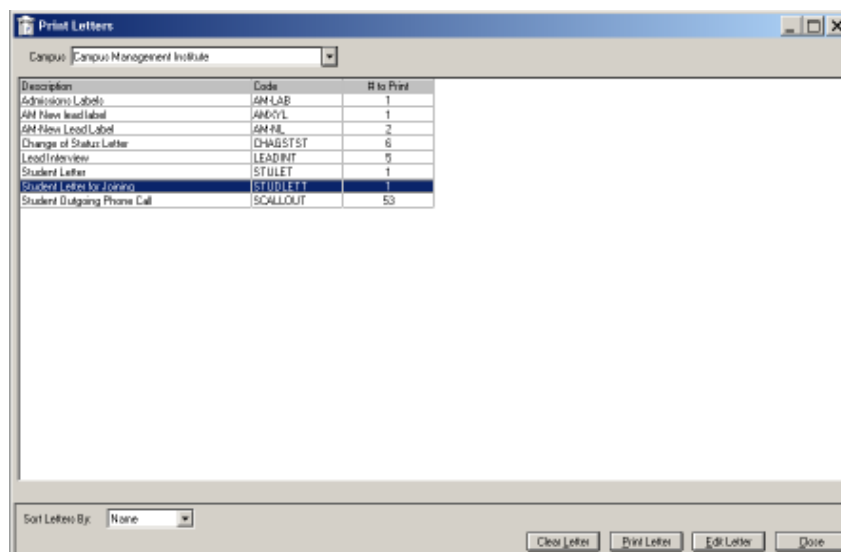
9. When Word closes, you return to the **Print Letter** dialog box. Choose one of the following options:
 - a. **Continue: Letters printed OK. Clear List:** Select this option if your letters printed successfully. This option will remove these letter activities from the Print Letters queue. It will also remove them from the sender's Contact Manager and update their status in each recipient's Contact History to "Letter Sent."
 - b. **Return to Letter Selection without Clearing List:** Select this option if you had printing problems and need to start over printing the same letter to the same recipient(s).



10. You now return to the **Print Letters** screen.

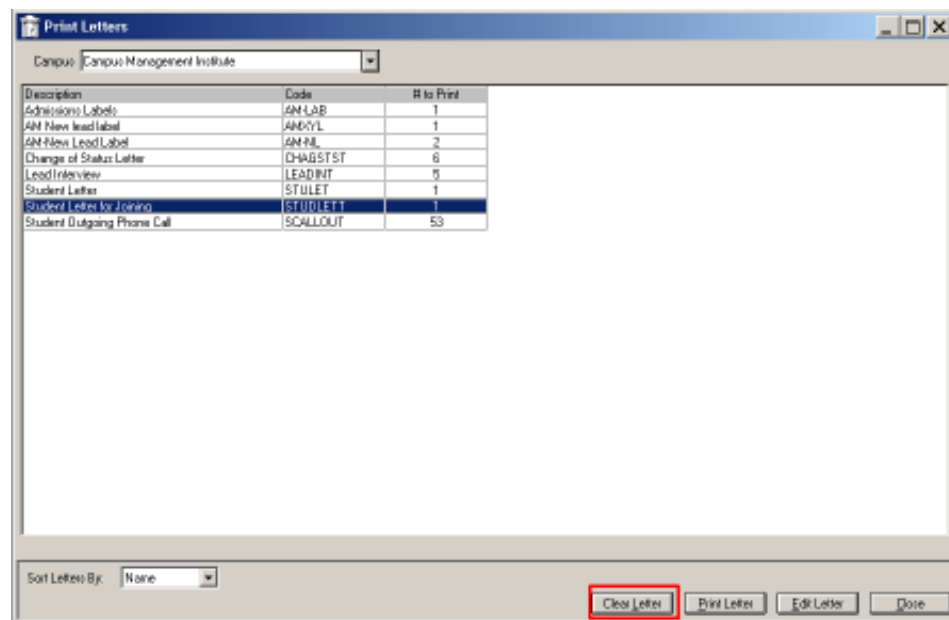
To clear the student letters manually:

1. Click **Daily > Contact Manager > Letters** or **Daily > Career Services > Print Employer Letters** to open the Print Letters form.

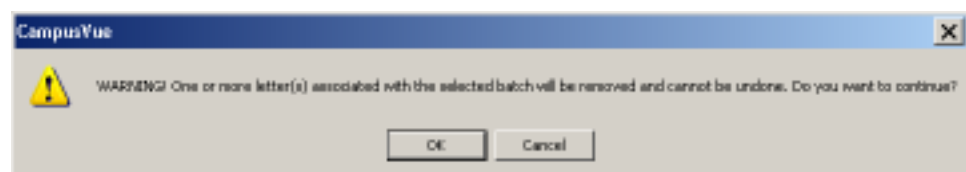


2. From the **Campus** box, select the campus for which letters are to be cleared.
3. Select a form letter that you do not wish to print and click the **Clear Letter** button.

Note: The **Clear Letter** button will be visible only, if you have Delete Letter permission.



4. A message appears, asking you if you want to continue (OK) or cancel the operation. If you click **OK**, the form letter is removed from the list and cannot be printed. If you click **Cancel**, the selected form letter is not removed.



5. You now return to the Print Letters screen.

SMS Text Messages

In this section, you will learn:

- How to configure the settings for the SMS service provider and configure a new activity event type "SMS - Text Messages."
- How to configure the system to send e-mail when a student is not subscribed to receive short message service (SMS).
- How to define "SMS sent" and "SMS failed" as activity results
- How to update a student's SMS text message preference from within the CampusVue application.

SMS Service Providers

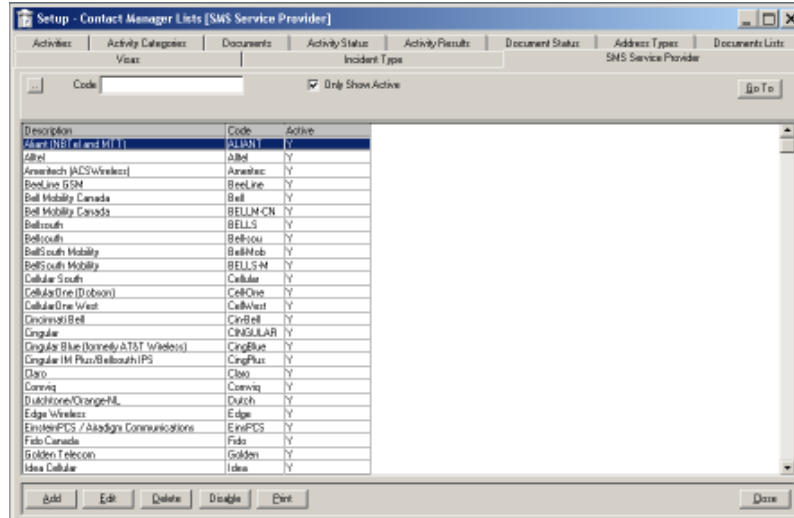
You can subscribe to and receive SMS communications, or text messaging, from your campus on your digital mobile phones, pocket computers, desktop computers, and some fixed phones.

To configure SMS Service Provider settings:

1. Click **Lists > Contact Manager** to open the Setup - Contact Manager Lists [Activities] form.

Description	Code	Active
Lead Interview	LEADINT	Y
Entrance Interview	ENTRANCE	Y
Exit Interview	EXIT	Y
Graduate Interview w/Employee	EMPINT	Y
New Lead Phone Call	NEWLEAD	Y
HSAS Phone Call	HSASCALL	Y
Student Outgoing Phone Call	SCALLOUT	Y
Send Student to FAD for Interview	FA	Y
Telenotifying	TN	Y
Staff Meeting	STAFFM	Y
Welcome Packet	WELCOME	Y
Employer Phone Call	EMPCALL	Y
Employer Letter Mktg	EMPLETN	Y
Employer Incoming Phone Call	EMPCAL	Y
Employer Meeting	EMPMET	Y
Employer E-Mail	EMPEMAIL	Y
Employer Message	EMPMES	Y
Employer Other Task	EMPOTHER	Y
Student Other Task	STUDOTHER	Y
Student Incoming Phone Call	SCALLIN	Y
Student Meeting	STUMET	Y
Student Message Activity	STUMES	Y
Student Letter	STULET	Y
E-mail Student	ENMAILSTU	Y
E-Mail Staff	ENMAILSTAFF	Y

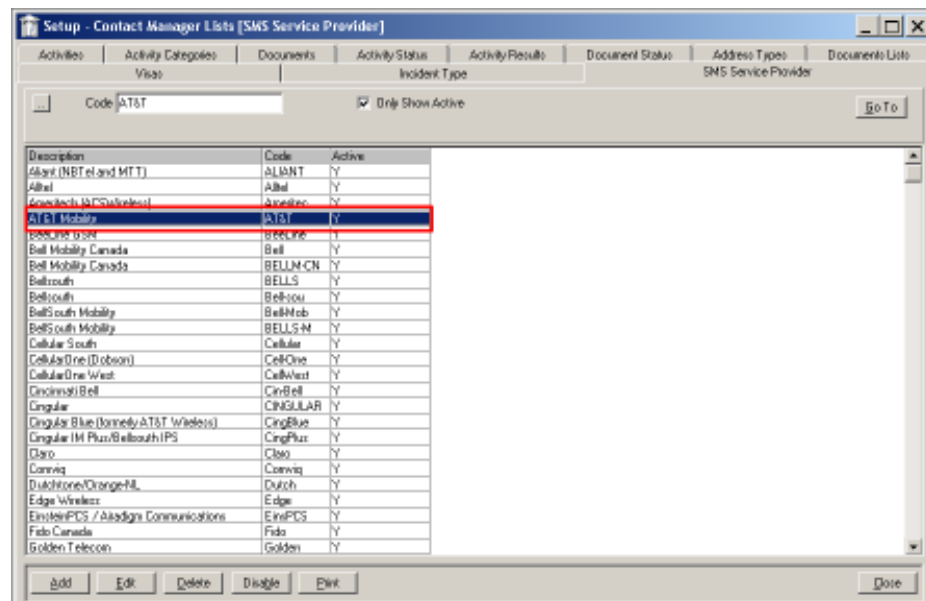
2. Click the **SMS Service Provider** tab to open a list of existing service providers.



- Click **Add** to open the SMS Service Provider Code Setup form. Otherwise, select a previously added service provider and click **Edit** to work with it.

- In the **Code** field, enter a code of maximum eight characters that you would like to assign to the service provider.
- In the **Description** field, enter the name of the service provider—maximum 30 characters.
- In the **Domain Name** field, enter a location or the domain name for the service provider—maximum 75 characters.
- In the **Max Characters** field, enter—up to three digits—the maximum number of characters that can be used in a text message.
- You can activate or deactivate the service provider by selecting or clearing, respectively, the **Active** check box on the SMS Service Provider Code Setup screen.

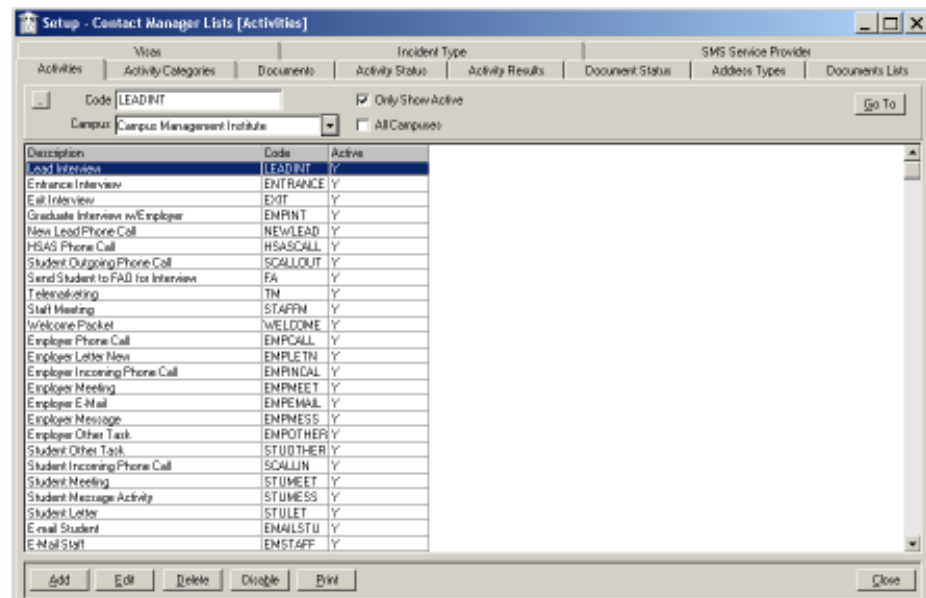
9. Click **Save**. The newly created or modified SMS Service Provider should be visible in the grid on the **SMS Service Provider** tab.



SMS - Text Messages Event Type Activity

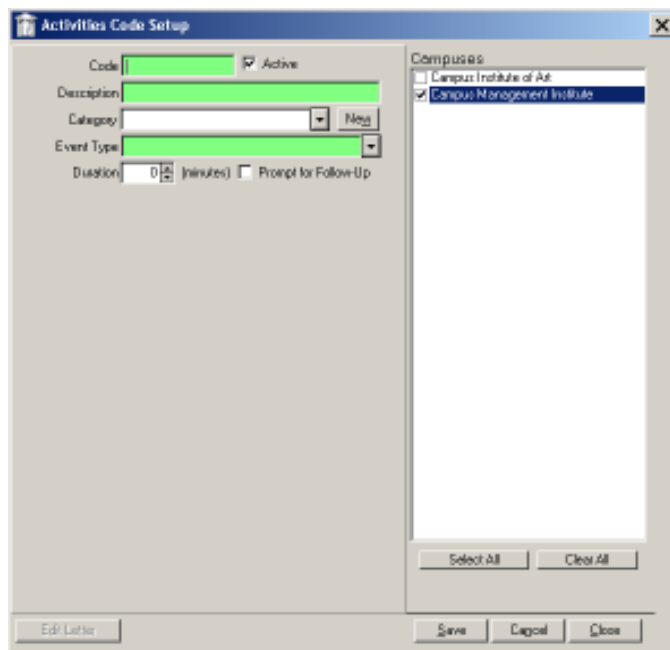
To configure SMS – Text Messages Event Type Activity:

1. Click **Lists** > **Contact Manager** to open the Setup - Contact Manager Lists [Activities] form.



2. Click the **Activities** tab to open a list of existing activities.

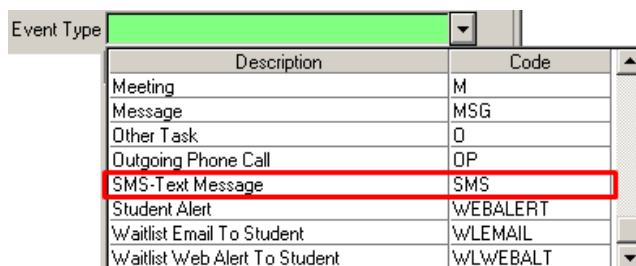
- Click **Add** to open the Activities Code Setup form or select a previously added activity and click **Edit** to work with it.



The 'Activities Code Setup' dialog box contains the following fields and controls:

- Code:** A text input field.
- Description:** A text input field.
- Category:** A dropdown menu with a 'New' button next to it.
- Event Type:** A dropdown menu.
- Duration:** A numeric input field followed by '(minutes)'.
- Prompt for Follow-Up:** A checkbox.
- Active:** A checkbox.
- Campus:** A list box showing 'Campus Institute of Art' and 'Campus Management Institute'.
- Buttons:** 'Select All', 'Clear All', 'Edit Letter', 'Save', 'Cancel', and 'Close'.

- Enter the required information in the **Code** and **Description** fields.
- Select a category from the **Category** box or click **New** to add a new activity category record.
- Select **SMS - Text Message** from the **Event Type** list.



The 'Event Type' dropdown menu is open, showing a list of event types. The 'SMS-Text Message' option is highlighted with a red box.

Description	Code
Meeting	M
Message	MSG
Other Task	O
Outgoing Phone Call	OP
SMS-Text Message	SMS
Student Alert	WEBALERT
Waitlist Email To Student	WLEMAIL
Waitlist Web Alert To Student	WLWEBALT

- Select the advisor from the **From Advisor** field.



The 'From Advisor' dropdown menu is open, showing a list of advisors. The 'Other - ADMIN : System Administrators' option is selected.

Academic Records
Admissions
Career Services
Financial Aid
International
Loan Management
Other - ADMIN : System Administrators
Other - ATHLETIC : Athletic Advisor

- If you want to sent the activity as an e-mail check the **Send activity as email if the recipient is not subscribed to receive SMS** box.

The 'Activities Code Setup' dialog box is shown for the activity 'SMSPOST'. The 'Code' field is 'SMSPOST' and it is marked as 'Active'. The 'Description' is 'SMS for postponement of exams'. The 'Category' is empty with a 'New' button. The 'Event Type' is 'SMS-Test Message'. The 'Duration' is '0' minutes, with a 'Prompt for Follow-Up' checkbox. The 'From Advisor' is 'Academic Records'. A checkbox 'Send activity as email if the recipient is not subscribed to receive SMS' is checked and highlighted with a red box. The 'SMS Message' field is empty. The 'Maximum Character Limit' is '50'. The 'Composes' list on the right contains 'Campus Institute of Art' and 'Campus Management Institute'. Buttons at the bottom include 'Select All', 'Clear All', 'Save', 'Cancel', and 'Close'.

9. Compose the SMS text message in the **SMS Message** field. Right-click in the SMS message box to use the existing e-mail merge fields while composing the SMS message. Remember that you are sending the same text message to each student to whom this activity is assigned.

Note: A warning message appears if the user exceeds the number specified next to **Maximum Character Limit**.

The 'Activities Code Setup' dialog box is shown again, but now with a warning message in a red box: 'WARNING! The length of the SMS Message (excluding mail merge fields) has exceeded maximum length of SMS text accepted by the provider(s). student(s) may get truncated message.' The 'SMS Message' field now contains the text: 'Hi <studentname>
Your exams have been postponed. Please contact Campus for further information.
Regards,
<studentadvisorlastname>'. The 'Maximum Character Limit' is '50' and the current count is '88 Character(s)'. The 'Select fields to merge in SMS' list on the right shows a tree structure with categories: 'Student Details' (including fields like <studentname>, <studentprogram>, <studentlastname>, <studentfirstname>, <studentnickname>, <studentstartterm>, <studentbirthdate>, <studentid>, <studentaddress>, <studentaddr1>, <studentcity>, <studentstate>, <studentzip>, <studentphone>, <studentemail>, <studentpin>, <studenthighschoolname>), 'Campus Details' (including <campusurb>, <campusname>), 'Ledger Information' (including <ledgerdesc1>, <ledgeramount>, <ledgerdate>), and 'Employer' (including <employername>). Buttons at the bottom include 'Close', 'Save', 'Cancel', and 'Close'.

10. Select at least one campus from the Campuses list. Click **Select All** or **Clear All**, as required.

The **Activities Code Setup** dialog box is shown. The **Code** is **SMSPOST** and **Active** is checked. The **Description** is **SMS for postponement of exams**. The **Event Type** is **SMS-Text Message**. The **Duration** is **0** minutes. The **From Advisor** is **Academic Records**. The **Send activity as email if the recipient is not subscribed to receive SMS** checkbox is checked. The **SMS Message** text area contains:


```
Hi <studentname>
Your exams has been postponed.
Regards,
<studentadvisorfirstname>
```

 The **Campuses** list on the right contains:

- ☐ Campus Institute of Art
- ☒ Campus Management Institute

 The **Select All** and **Clear All** buttons are at the bottom of the list. The **Save**, **Cancel**, and **Close** buttons are at the bottom of the dialog.

11. Click **Save** and **Close** to exit the Activities Code Setup form. The newly created or modified SMS - Text Message event type activity should be visible in the grid on the **Activities** tab.

The **Setup - Contact Manager Lists [Activities]** window is shown. The **Code** is **SMSPOST** and **Only Show Active** is checked. The **Campus** is **Campus Management Institute**. The **Activities** tab is selected. The list of activities is shown below:

Description	Code	Active
ADIN - 2nd Interview	ADM3	Y
ADIN - 2nd Interview No Show Follow Up Call	ADM3NSF	Y
ADIN - 2nd Rescheduled 2nd Interview	ADM3R3	Y
ADIN - 2nd Rescheduled 2nd Interview	ADM3R3	Y
George's Test Label	GEORGEA	Y
Testing Activity Code for a letter	TEST	Y
FA- Grade Level Promotion Activity	FAGRADEP	Y
Enrollment Verification	SENDENRFF	Y
Promissory Note Default	PROMNDEFY	Y
Test Cleared	TESTCLEA	Y
Send wallet email to student	WEM1ST	Y
Billing Emails	BILL EMA	Y
Email to Parent	EM1 PARN	Y
Parent Letter	PARINT LT	Y
Parent Letter	PARINTLTR	Y
Email Activity for All Missing Documents	EMAILACT	Y
Student Alert	STUDALRT	Y
A Student Alert	ASTUDALR	Y
Other Tools	OTHERTAS	Y
SAP Follow Letter	SAPFLET	Y
Enables Conf of Student 60 days second meeting	EMPCON60	Y
Meeting	MEETING2	Y
Test	TEST111	Y
Student Letter for Joining	STUDLETT	Y
SMS for postponement of exams	SMSPOST	Y

The **SMS for postponement of exams** activity is highlighted in red. The **add**, **edit**, **delete**, **disable**, **print**, and **done** buttons are at the bottom.

Defining SMS Activity Results

To define "SMS Sent" and "SMS Failed" as activity results:

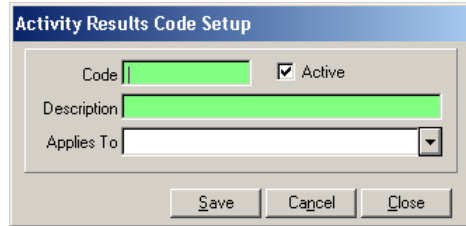
1. Click **Lists > Contact Manager** to open the Setup - Contact Manager Lists [Activities] form.

Description	Code	Active
Lead Interview	LEADINT	Y
Entrance Interview	ENTRANCE	Y
Exit Interview	EXIT	Y
Graduate Interview w/ Employer	EMPRINT	Y
New Lead Phone Call	NEWLEAD	Y
HSAS Phone Call	HSASCALL	Y
Student Outgoing Phone Call	SCALLOUT	Y
Send Student to FAD for Interview	FA	Y
Teleconferencing	TM	Y
Staff Meeting	STAFFM	Y
Welcome Packet	WELCOME	Y
Employer Phone Call	EMPCALL	Y
Employer Letter New	EMPLETN	Y
Employer Incoming Phone Call	EMPRNCAL	Y
Employer Meeting	EMPMET	Y
Employer E-Mail	EMPEMAIL	Y
Employer Message	EMPMESS	Y
Employer Other Task	EMPOTHER	Y
Student Other Task	STUDOTHER	Y
Student Incoming Phone Call	SCALLIN	Y
Student Meeting	STUMET	Y
Student Message Activity	STUMESS	Y
Student Letter	STULET	Y
E-mail Student	EMAILSTU	Y
E-Mail Staff	EMSTAFF	Y

2. Click the **Activity Results** tab to open a list of existing activity results.

Description	Code	Active
And Interview Needed	AND	Y
Call Completed	CALLDONE	Y
Closed Activity	C	Y
E-mail sent	emailsent	Y
Everything Went Wrong	MESSDUP	Y
Left Message	MSG	Y
Letter Sent	LETSENT	Y
Meeting Cancelled	C	Y
Meeting Given	GIVEN	Y
Meeting Postponed	P	Y
Task Complete	TASKDONE	Y

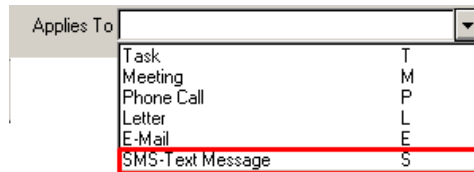
3. Click **Add** to open the Activity Results Code Setup form.



The 'Activity Results Code Setup' dialog box contains the following fields and controls:

- Code:** A text input field.
- Active:** A checked checkbox.
- Description:** A text input field.
- Applies To:** A dropdown menu.
- Buttons:** Save, Cancel, and Close.

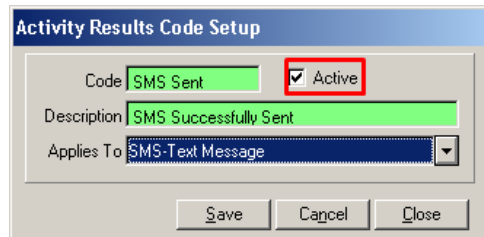
4. Enter SMSSENT in the **Code** field.
5. Enter SMS Sent in the **Description** field.
6. Select **SMS- Text Message** from the **Applies To** list.



The 'Applies To' dropdown menu is open, showing a list of activity types. The item 'SMS-Text Message' is highlighted with a red box.

Activity Type	Initials
Task	T
Meeting	M
Phone Call	P
Letter	L
E-Mail	E
SMS-Text Message	S

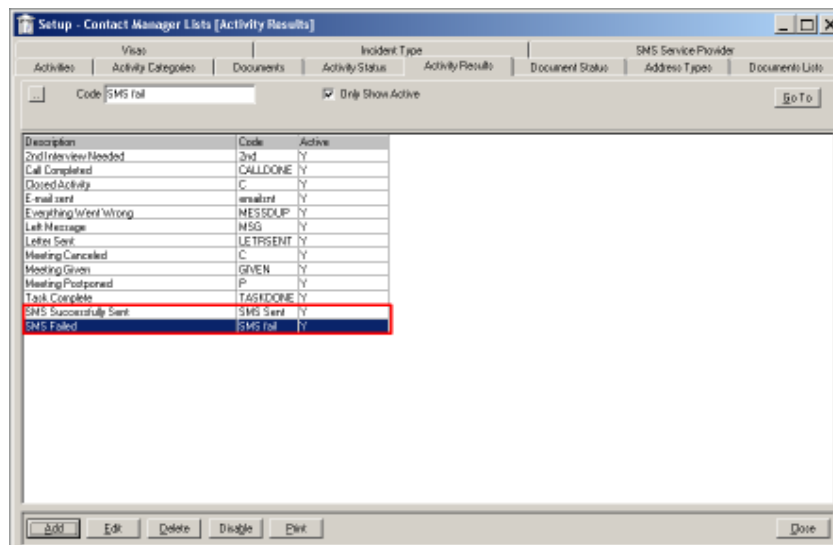
7. You can activate or deactivate the Activity Result by selecting or clearing, respectively, the **Active** check box on the Activity Results Code Setup screen.



The 'Activity Results Code Setup' dialog box is shown with the following values:

- Code:** SMS Sent
- Active:** Checked checkbox
- Description:** SMS Successfully Sent
- Applies To:** SMS-Text Message

8. Click **Save**. Similarly, add a new activity result for SMS failed.
9. The new SMS - Text Message activity results should be visible in the grid on the **Activity Result** tab.



The 'Setup - Contact Manager Lists [Activity Results]' window displays a table of activity results. The 'SMS Successfully Sent' and 'SMS Failed' rows are highlighted with a red box.

Description	Code	Active
2nd Interview Needed	2nd	Y
Call Completed	CALLDONE	Y
Closed Activity	C	Y
E-mail sent	emailsent	Y
Everything Went Wrong	MESSGUP	Y
Left Message	MSG	Y
Letter Sent	LETTRSENT	Y
Meeting Canceled	C	Y
Meeting Given	GVEN	Y
Meeting Postponed	P	Y
Task Complete	TASKDONE	Y
SMS Successfully Sent	SMS Sent	Y
SMS Failed	SMS fail	Y

Updating Student's SMS Text Preference

To subscribe to receive SMS text messages:

- A student must have a mobile phone number on the file in the Student Master form.
- The Subscribe to SMS Service check box under SMS Preference must be selected on the Contact Manager's Contact Method screen.
- An SMS service provider must be selected.

To update a mobile phone number:

1. Click **View > Contact Manager > Student** to open the Student Master form in the work area.

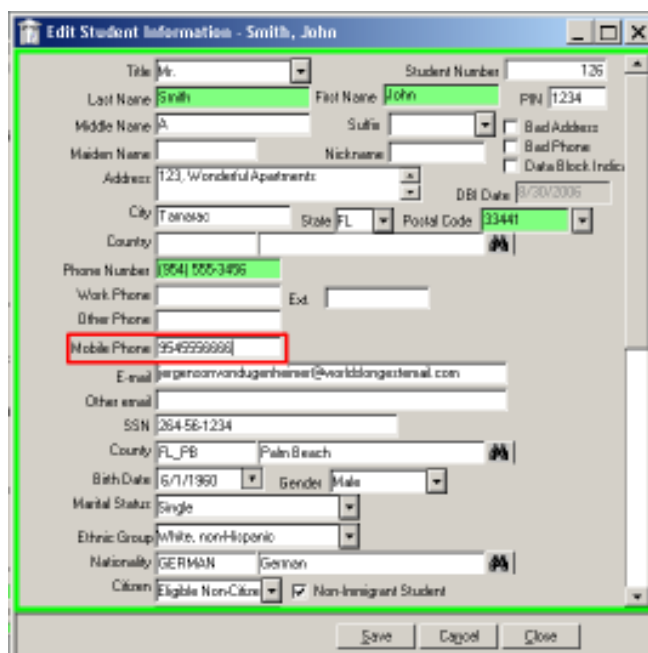
Note: The **SMS** button will be disabled in the form. This button will be enabled when the student is subscribed to receive SMS text messages.

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		<input type="checkbox"/> Bad Address	Last Activity Date	08/21/2007	12:00 PM
Phone Number	(954) 555-3456	<input type="checkbox"/> Bad Phone	Adm. Rep	Andrew Mellon	
Work Phone		Ext.	Interest	Business	
Other Phone		County	Program	Marketing Management	
Mobile Phone			Shift	Day	
E-mail	jergensonvondugenheimer@worldslongestmail		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-Hispani	Nationality	German	Current LDA	9/8/2006
Citizen	Eligible Non-Citizen	Alien #	234567890	<input checked="" type="checkbox"/> Non-Immigrant Student	<input type="checkbox"/> Data Block Indicator
Driv. Lic State	FL	DL #	V989-789-02-456-0	DBI Date	8/30/2006

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

2. Click **Edit** to open the Edit Student Information form. Update the mobile phone number in the **Mobile Phone** field.



Edit Student Information - Smith, John

Title: Mr. Student Number: 1234

Last Name: Smith First Name: John PIN: 1234

Middle Name: A Suffix: Bad Address: ☐ Bad Phone: ☐ Data Block Index: ☐

Maiden Name: Nickname: DBI Date: 8/30/2006

Address: 123, Wonderful Apartments

City: Tamarac State: FL Postal Code: 33441

Country: Phone Number: (954) 555-3456

Work Phone: Ext: Other Phone: Mobile Phone: (954) 555-6666

E-mail: jergensonvondugenheimer@worldslongestemail.com

Other email: SSN: 264-56-1234

County: FL_PB Palm Beach

Birth Date: 6/1/1990 Gender: Male

Marital Status: Single

Ethnic Group: White, non-Hispanic

Nationality: GERMAN German

Citizen: Eligible Non-Citizen ☒ Non-Immigrant Student ☐

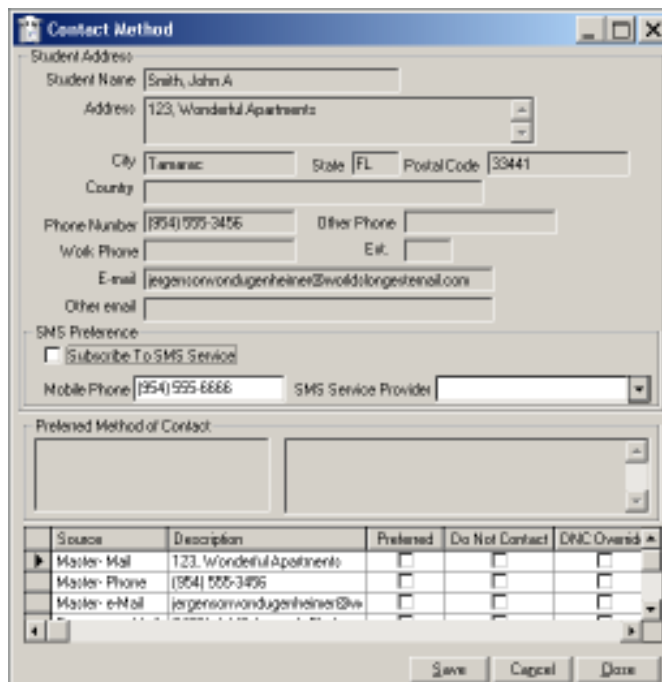
Save Cancel Close

3. Click **Save** to save the changes in the database.

To subscribe to an SMS service and to select an SMS service provider:

1. Click **View > Contact Manager > Contact Method** to open the Contact Method form.

Note: The Contact Method form pulls data from the Student Master and the Student Addresses forms.



Contact Method

Student Address:

Student Name: Smith, John A

Address: 123, Wonderful Apartments

City: Tamarac State: FL Postal Code: 33441

Country: Phone Number: (954) 555-3456 Other Phone: Ext: Work Phone: E-mail: jergensonvondugenheimer@worldslongestemail.com Other email:

SMS Preference:

☐ Subscribe To SMS Service

Mobile Phone: (954) 555-6666 SMS Service Provider:

Preferred Method of Contact:

Source	Description	Preferred	Do Not Contact	DNC Override
Master Mail	123, Wonderful Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Master Phone	(954) 555-3456	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Master e-Mail	jergensonvondugenheimer@w...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel Close

2. Select the **Subscribe to SMS Service** check box. If the box is selected, the student has subscribed to receive text messages from the school. If the box is clear, the student has not subscribed or has unsubscribed and does not want to receive text messages from the school.

Note: The Mobile Phone and SMS Service Provider fields become mandatory on this form if the **Subscribe to SMS Service** check box is selected.

Contact Method

Student Address

Student Name: Smith, John A

Address: 123, Wonderful Apartments

City: Tamarac State: FL Postal Code: 33441

Country:

Phone Number: (954) 555-3456 Other Phone:

Work Phone: Ext.:

E-mail: jergensonvondugenheimer@worldslongestemail.com

Other email:

SMS Preference

☒ Subscribe To SMS Service

Mobile Phone: (954) 555-6666 SMS Service Provider:

Preferred Method of Contact

Source	Description	Preferred	Do Not Contact	DNC Override
Master- Mail	123, Wonderful Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Master- Phone	(954) 555-3456	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Master- e-Mail	jergensonvondugenheimer@w	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel Close

3. Select the provider from the **SMS Service Provider** list.

SMS Service Provider: Cingular

Description	Co
Cingular	CINGULAR
Cingular Blue (formerly AT&T Wireless)	CingBlue
Cingular IM Plus/Bellsouth IPS	CingPlus
Claro	Claro
Comviq	Comviq
Dutchtone/Orange-NL	Dutch
Edge Wireless	Edge
EinsteinPCS / Airadigm Communications	EinsPCS

4. Click **Save**.

- Click **View > Contact Manager > Student** to open the Student Master form. The **SMS** button is enabled and can be used to send SMS text messages to the student.

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		<input type="checkbox"/> Bad Address	Last Activity Date	08/21/2007	12:00 PM
Phone Number	(954) 555-3456	<input type="checkbox"/> Bad Phone	Adm. Rep	Andrew Mellon	
Work Phone		Ext.	Interest	Business	
Other Phone		County	Program	Marketing Management	
Mobile Phone	(954) 555-6666	Palm Beach	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-Hispani	Nationality	German	Current LDA	9/8/2006
Citizen	Eligible Non-Citizen	Alien #	234567890	<input checked="" type="checkbox"/> Non-Immigrant Student	<input type="checkbox"/> Data Block Indicator
Driv. Lic State	FL	DL #	V989-789-02-456-0	DBI Date	8/30/2006

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

Contact History


When you schedule an activity, it appears not only in your own Contact Manager but also in the student's Contact History.

You can view a student's Contact History if that student's name is in your Recent Students box. You can put a student's name in the Recent Students box by opening the student's Student Master form. Do this in one of the following ways:

Select a student's name from the Recent Students box drop-down list by clicking on the drop-down arrow to the right of the box.



Perform a student search. When the student's name appears in the search results, double-click it to open the Student Master form which will also put that student's name in the Recent Students box.

With the student's name in the Recent Students box, click the **View Student Contact History** icon  on the Shortcut Bar.



All activities connected to your student will appear in the grid.

	Due Date	Date Completed	From	Description	Setup By	Enrollment	Event Type
1st Entrance Interview	4/12/2009			Pending	System Admin		Meeting
2nd Interview	7/31/2007		09:00 AM	Pending	System Admin		Meeting

Schedule Entrance Interview

Activities sorted by Due Date

Highlight an activity to see the comments associated with it in the box at the bottom of the form.

A scheduled activity that has not yet occurred will have a **Pending** status. Once you close a pending activity in your Contact Manager, the status of that activity in the student's Contact History form will change to **Closed**.

You can also **Add**, **Edit**, and **Close** activities for this student directly from the student's Contact History form. To do so, use the buttons in the lower left of the form.

	Due Date	Date Completed	From	Description	Setup By	Enrollment	Event Type
Entrance Interview	4/12/2002			Pending	System Syste		Meeting
Exit Interview	7/31/2007		09:00 AM	Pending	System Admi		Meeting

Schedule Entrance Interview

Add Activity **Edit Activity** **Close Activity** **Print** **Close**

Activities sorted by Due Date

Any changes you make in the student's Contact History form are simultaneously updated in your Contact Manager. For example, if you add an activity from the student's Contact History form, it will also be added to your Contact Manager; or if you close an activity from the student's Contact History form, it will also drop off of your Contact Manager. However, ALL activities, regardless of status, are stored in the student's Contact History form and can be viewed there at any time.

Note: Your school policy determines how long an activity remains visible in the **Current** tab of the Contact History before it is moved to the **Historical** tab.

Document Tracking

This section introduces you to the basic concepts of Document Tracking.

Document Tracking within CampusVue allows you to attach single documents and lists of documents to a student's record. You can then record a status for each document in order to tell which documents you have on file and which documents are missing. Document Tracking is a critical function to remain in compliance with both school policy and governmental regulations – especially in the Recruiting, Academics, and Financial Aid areas.

This section will introduce you to the basic concept of how to perform document tracking. Specific documents that must be tracked by area will be introduced in the later modules of this training.

Adding a Document

To add a document to a student's Document Tracking form:

- 1 With the student's name in the Recent Students box, select **View > Contact Manager > Documents** to open the student's Document Tracking form.

- 2 To add a single document for this student, click **Add Document**. This activates the **Document Detail** tab in the lower half of the form.

- 3 Select the document to add from the **Document** drop-down list.

Note: Some documents are added by the system when a student moves to a certain status or when a certain activity has been set up.

- 4 Select the **Document Status**.
- 5 Enter the **Date Requested**, **Date Due**, **Date Sent**, **Date Received**, **Date Approved**, and **Date Expires** data as it becomes available. The **Date Sent** field is automatically updated when a mail merge letter is printed that has the document included as an attachment.

Note: All documents should be added with a **Document Status** and a **Due Date**. This will enable you to track and report on any missing documents for this student.

- 6 If the document is defined as an “Inbound Transcript Request,” the **Inbound Transcript Request** tab will activate.

Populate its fields and click **Print Request Letter** to generate a transcript request letter addressed to the selected college.

The screenshot shows a web form titled 'Document Detail' with a sub-header 'Inbound Transcript Request'. The form contains the following fields and controls:

- Request Type:** College
- Request Number:** 0
- College:** BARRY Barry University
- Program of Study:** Facilities Management for 2005S
- Attendance Dates:** 6/2/2005 through 4/6/2007
- Transcript Fee:** 0.00
- Buttons:** 'Print Request Letter' (highlighted with a red box), 'Save', 'Cancel', and 'Close'.

- 7 Add **Comments** if necessary.
 - 8 Click **Save** to save the new document.
- Repeat this process as necessary.

Adding a Document List

To add a document list to a student's Document Tracking form:

- 1 With the student's name in the Recent Students box, select **View > Contact Manager > Documents** to open the student's Document Tracking form.

The screenshot shows a web form titled 'Document Tracking: Atmann, Karen'. The form contains the following fields and controls:

- Unique Student ID:** 13749
- SSN:** 805-58-5555
- Student #:** 13749
- Enrollment No.:** 494
- Enrollment:** Facilities Management for 2005S
- Module:** <All Modules>
- Table:** A table with columns: Document, Source, Status, Requested, Approved, Received, Date Due.
- Buttons:** 'Add Document List', 'Add Document', 'Display Document', 'Audit', 'Edit', 'Delete'.
- Document Detail Tab:**
 - Document:** (highlighted in green)
 - Document Status:** (highlighted in green)
 - Enrollment:** Facilities Management for 2005S
 - Date Requested:** (highlighted in green)
 - Date Sent:**
 - Date Approved:**
 - Date Due:**
 - Date Received:**
 - Date Expires:**
 - Comments:**
- Buttons:** 'Save', 'Cancel', and 'Close'.

- 2 To add a document list for this student, click **Add Document List**. This activates the **Document Detail** tab in the lower half of the form.

- 3 Select the document list to add from the **Document List** drop-down.
- 4 Select an initial **Document Status**. The same status is assigned to all documents on the document list.
- 5 Enter the **Date Requested**, **Date Due**, **Date Sent**, **Date Received**, **Date Approved**, and **Date Expires** as needed. The same dates are assigned to all documents on the document list.
- 6 Click **Save** to add the documents from the Document List to the student's document tracking file.

Repeat this process as necessary.

Updating the Status of a Document

Once you have added document(s) or a document list, these will appear in the documents list on the top half of the Document Tracking form.

Note: Document-scanning software may be used with CampusVue. An icon present in the leftmost column of the documents list indicates that the document is viewable.

To update the status of a document once you have sent or received it:

- 1 Click the document name once to highlight it.

Document Tracking: Abel-McHann, Jacqueline

Unique Student ID: 27048 SSN: 573-11-2676
 Student #: 309 Enrollment No.: 425

Enrollment: Bach. of General Management Module: <All Modules>

Document	Source	Status	Requested	Approved	Received	Date Due
FAFSA	FA	Requested - Required	5/12/2005			5/12/2005

Buttons: Add Document List, Add Document, Display Document, Scan Cover Sheet, Audit, Edit, Delete

Document Detail | Inbound Transcript Request

Document: FAFSA Document Status: REQREQ
 Enrollment: Bach. of General Management Award Year:
 Date Requested: 5/12/2005 Date Sent: Date Approved:
 Date Due: 5/12/2005 Date Received: Date Expires:
 Comments:
 Save Cancel Close

- Click **Edit**. This activates the **Document Detail** tab for that document.

Document Tracking: Abel-McHann, Jacqueline

Unique Student ID: 27048 SSN: 573-11-2676
 Student #: 309 Enrollment No.: 425

Enrollment: Bach. of General Management Module: <All Modules>

Document	Source	Status	Requested	Approved	Received	Date Due
FAFSA	FA	Requested - Required	5/12/2005			5/12/2005

Buttons: Add Document List, Add Document, Display Document, Scan Cover Sheet, Audit, Edit, Delete

Document Detail | Inbound Transcript Request

Document: FAFSA Document Status: REQREQ
 Enrollment: Bach. of General Management Award Year:
 Date Requested: 5/12/2005 Date Sent: Date Approved:
 Date Due: 5/12/2005 Date Received: Date Expires:
 Comments:
 Save Cancel Close

- Edit the **Document Status**, **Date Sent** and/or **Date Received**. Also enter **Comments** as required.
- Click **Save** to save the changes.

Repeat this process for each document you need to update.

Document Tracking

You can perform Document Tracking in three ways:

- Document Tracking using a student's **Documents** folder
- Document Tracking using the Daily menu
- Document Tracking using the Document Tracking report

Document Tracking Using a Student's Documents Folder

You can open an individual student's **Documents** folder to view and update the document statuses for the student's documents.

To track documents for a student:

- 1 Select the student for whom documents are to be tracked.
- 2 Select **View > Contact Manager > Documents** to open the student's Document Tracking form. Documents that have already been added to the student's list will appear in the grid.

The screenshot shows the 'Document Tracking' application window. At the top, there are fields for 'Unique Student ID' (554 279-29-6671), 'Student #', and 'Enrollment No.'. Below these are dropdown menus for 'Enrollment' and 'Module' (set to 'All Modules'). A table displays a list of documents with columns: Document, Source, Status, Requested, Approved, Received, and Date. The table contains several rows, including 'Application for Enrollment', 'Driver's License', 'Letter of Recommendation', 'Birth Certificate', 'Student Picture', and 'Social Security card'. Below the table are buttons for 'Add Document List', 'Add Document', 'Display Document', 'Scan Cover Sheet', 'Audit', and 'Delete'. At the bottom, there is a 'Document Detail' section with dropdowns for 'Document' and 'Document Status', and input fields for 'Date Requested', 'Date Due', 'Date Sent', 'Date Received', 'Date Approved', 'Date Expires', and a 'Comments' text area.

- 3 Select an **Enrollment** from the drop-down list. **All Enrollments** is the default. The documents related to the selected enrollment/module combination display in the grid.
- 4 Select a **Module** from the drop-down list. The documents related to the selected enrollment/module combination display in the grid.
- 5 Select an **Award Year** from the drop-down list. This drop-down list is available only if the **Financial Aid** module is selected. The documents related to the selected award year display in the grid.

Document Tracking Using the Daily Menu

Document Tracking is available in the Admissions, Financial Aid, Student Accounts, Academic Records, Loan Management, and Career Services modules. You can use the **Daily > Document Tracking** feature to view all documents of a certain type to determine the document's status for each student.

To track documents using the Daily menu:

- 1 Select **Daily > Admissions (or other module) > Document Tracking** to open the department's Document Tracking form.

Student	Status	Date Rec'd	Date Due	Date Rec'd	Date Acpt'd	Search
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						

Default Values: Document Status: Date Rec'd: Date Due: Date Rec'd: Date Acpt'd: Period of View: Set

Save Cancel Close

- 2 Select a **Document** from the drop-down list. All students having the selected document related to their files are listed on the form.

Student	Status	Date Rec'd	Date Due	Date Rec'd	Date Acpt'd	Search
1	Abbott, Karen A	Requested - Requested	3/7/2005	3/17/2005		
2	Abbott, Karen A	No Longer Needed	1/25/2000			
3	Abel-McHarm, Jacqueli	Requested				
4	Abel-McHarm, Jacqueli	Requested - Requested	12/8/2004	12/18/2004		
5	Aberdeen, Craig E	Requested				
6	Adair, Bill	Requested - Requested	4/7/2000			
7	Adair, Kim	No Longer Needed				
8	Adair, Stephen J	Requested - Requested	7/15/2005	7/22/2005		
9	Adams, Sylvia	Requested				
10	Adams, Daryl	Requested				
11	Adams, Jodi	Requested				
12	Adams, John Q	Requested				
13	Adams, Kamako M	Requested				
14	Adams, Kent	On File	12/5/2003			
15	Adams, Samuel	Requested				
16	Adams, Tiffany	Requested				

Default Values: Document Status: Date Rec'd: Date Due: Date Rec'd: Date Acpt'd: Period of View: Set

Save Cancel Close

- 3 Enable or disable the **View documents not Received** check box. If you enable this check box, only those documents that have not been received appear in the grid. If you disable the check box, all documents will appear.
- 4 Select an **Award Year** to which the documents apply. This drop-down list is available only if a Financial Aid-related document is selected.
- 5 Select a **Document Status**. If you select a document status, the grid will contain only those documents that have the selected status.
- 6 Enable or disable the **View All Statuses** check box.
- 7 From the displayed list, select an individual student document.
- 8 Click a cell in the row you want to update. You can update the **Status**, **Date Requested**, **Date Received**, **Date Due**, **Date Accepted**, and **Scanned** indicator.

Note: While editing the date fields, enter the century along with the year. For example, 06/30/2007: if you just enter 07 instead of 2007, the program will reject it.

- 9 Click **Scanned**, if necessary, to indicate that you have scanned the requested document into your electronic filing system.
- 10 **Default Values** tab: Use this tab to update statuses and dates in batches. For example, if you select a **Status** or a **Date Due**, the system updates the value(s) you select for all students whose names appear in the grid. Click **Set** to update the values and save the changes.

- 11 **Search Student** tab: Use this tab to locate a student using **SSN** (Social Security Number) or **Student ID** as a search criterion. Type in either of the numbers, and then click **Filter**. The name and information of the student associated with that number appear in the grid. Click **Clear Filter** to disable that search criterion. The grid will revert to the previous display of students.

- 12 Click **Close** to save your changes and close the form.

Document Tracking Using the Document Tracking Report

You can use the Document Tracking report to view a list of documents and the status of documents for selected campuses, types of documents, and students.

To view the Document Tracking report:

- 1 Select **Reports > Contact Manager > Document Tracking Report** to open the Report Selection form for the Document Tracking Report.

Report Selection: Document Tracking Report

Report Preference
 Reference Name:
 Load Save Save As Remove

Sort Variables
 Document Status
 Date Requested
 Date Received
 Date Due
 Date Sent

Selected Sort Order
 Campus
 Document Type
 Student Name

Campus Selection **Selection** **Student Groups**

Items
☐ Codes ☒ Descriptions:

Document Type
 Document Status
 Status Category
 School Status
 Module
 Adm. Rep
 Program
 Interest

Selection
 Date Requested to
 Date Received to
 Due Date to
 Date Sent to
 Date Approved to
 Version Start Date to
 Expected Start to
 Graduation Date to

Student ID to Print Enrollment Number

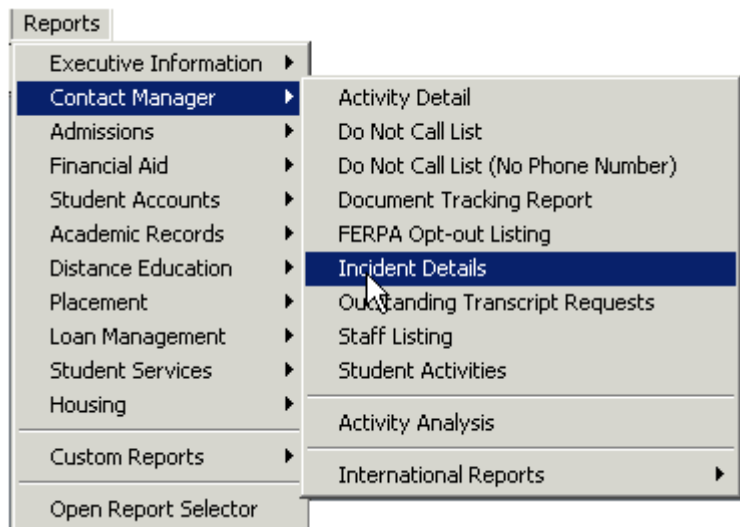
Preview Close

- 2 Set the filters and date fields to satisfy your report requirements...
- 3 Click **Preview** to open the Report Viewer and display the Document Tracking Report.

[illegible]

Contact Manager Reports

The **Reports** drop-down menu is organized by departments. Each department has a list of reports that are relevant to the work done there. The list of reports is alphabetically sorted for each module and varies in length as new reports are added and old reports are replaced with newer versions. An asterisk (*) indicates a customized report designed for your institution(s). You can click **Reports > Contact Manager** to access reports associated with the Contact Manager module.



The Reports menu displays the following two menu items for each module:

Custom Reports

Custom Reports are designed especially for your campus. Such reports are developed by someone at your school who can use Crystal Reports®. These reports are created either by editing an existing CampusVue generic report or by creating a new report from scratch. Your System Administrator can use the **Setup > Report Maintenance** option to work with custom reports.

Open Report Selector

You can click this option to display a window in which all reports (for all modules) that you have permission to run are listed by going to **Reports > Open Report Selector** option.

General Features of CampusVue Reports

Once a report has been generated, some features are viewable and are common to all the department-specific reports in CampusVue. Listed below are common features:

- The **Title** of the report is in the upper-left corner of each page.
- The **Selection Criteria** are listed in the upper-left corner of the first page.
- The **Sort Order** is listed in the upper left corner of the first page.

- The **Name of the Program** that produced the report is listed in the upper-right corner of the first page.
- The **Date and Time** that the report was printed is listed in the upper right corner of each page.
- **Column headers** are shown at the top of each page.
- **Group headers** are listed on the left side of the report as required by your sorting criteria. Note that you can sort by all the available sort variables but group totals are available only for the high-order three sort variables.
- The **Total number of records** selected will be listed at the end of the report.
- The **Company name** will appear in the lower-left corner of each page. (This is the company name from the **Setup > System menu option**.)

Incident Report

Overview: One record in overview mode
At Risk: 100

Sort by: Campus, Incident Type

Emergency Management Incidents

Summary

		2008		2009		2010	
		Campus	Public Prep	Public Prep	Public Prep	Public Prep	Public Prep
PTSD	PTSD	28	8	4	2		
Building	Building	17	1	8	1		
Total		28	9	4	3		

Details

2008

Property: 2008
Campus: 28

2009

Property: 1
Campus: 1

Building

2010

Property: 1
Campus: 1

Building

2011

Property: 1
Campus: 1

Building

Overview Summary:

Page 4 of 8

Note: Reports from your system parameter tables can be printed in a similar manner from the **Lists** menu.

Some reports will be displayed as an HTML document. When an HTML report opens, you can right-click on the report and then select **Print** from the context-menu to print it.

Accessing Reports

Reports are accessed from the main CampusVue menu under the **Reports** option. You can run reports only if your user profile has been granted the proper permissions. Selecting **Reports >**

Open Report Selector displays a window that lists by department all the reports that you are permitted to run.

To access a specific contact manager report:

- 1 Select **Reports > Contact Manager > specific report**.
- 2 When the Report Selection form opens, set the filters and date fields to satisfy your reporting requirements.

The following screen displays the Report Selection form for the Incident Details report.

Report Preview

After you have selected the appropriate parameters from the Report Selection form, you can click **Preview** to open the Report Viewer window and see your report.

The following screen displays the Incident Details form.

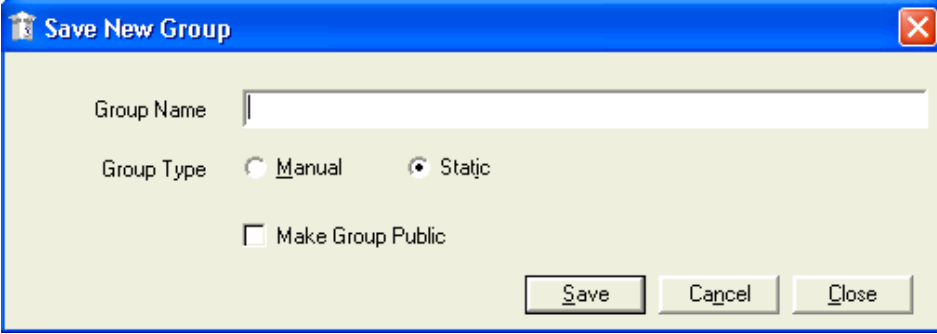
Report Viewer Controls

Report

The **Report** menu on the Report Viewer form provides for printing the report, printer setup, exporting the report to other applications such as Excel, and closing the viewer window. The following options are available on the Reports menu:

- **Print:** You can select this option when you are ready to print the report. A Print icon is also provided at the top of the Report Viewer form.
- **Print Setup:** This option calls the typical Windows printer setup form from which you can select a printer, set the number of copies to be printed, and access other reporting functions.
- **Save Student Group:** If the internal Campus Id and internal Student Id are contained in the record set for the report, you can save the students listed on the report as a group. Select this option and give your group a name.

The following screen displays the Save New Group dialog:

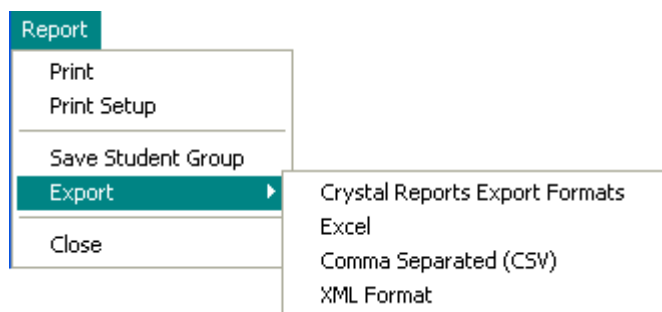


The image shows a Windows-style dialog box titled "Save New Group". It has a blue title bar with a close button (X) in the top right corner. The main area is light beige and contains the following controls:

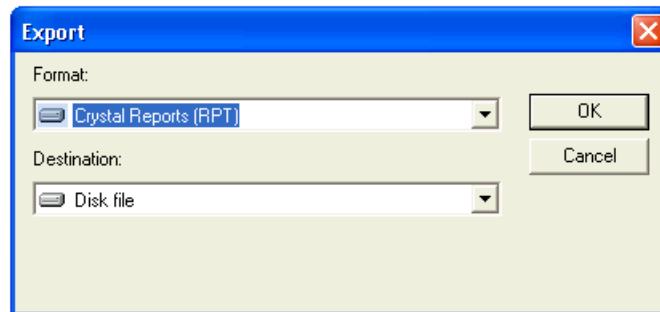
- A text input field labeled "Group Name" with a cursor inside.
- Radio buttons for "Group Type": "Manual" and "Static". The "Static" radio button is selected.
- A checkbox labeled "Make Group Public" which is currently unchecked.
- Three buttons at the bottom right: "Save", "Cancel", and "Close".

In this example, the default definition for the new student group is a "Static" group, meaning that the list of names in the group can be refreshed on demand (your school can also choose manual for the default group definition). You can also open the group via View/Student Groups and change the group type to Dynamic, Frozen, or Manual. For details refer to *CampusVue Help*.

- **Export:** You can select this option to view different export formats. In the example given below, users can select from the following four export formats: **Crystal Reports Export Formats**, **Excel**, **Comma Separated (CSV)**, and **XML Format**.



With each report selection you can select the format and destination of your report. Several options are available for both Format and Destination. Click **OK** after you make your selections.



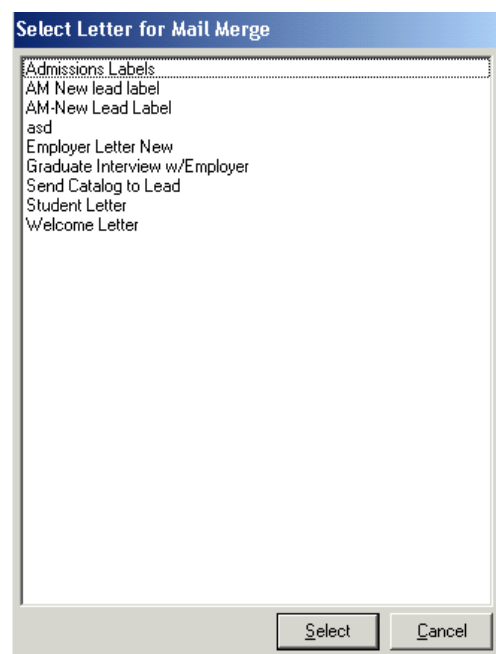
- **Close:** You can select this option to close the Report Viewer form. You can do this before or after you print the report. The program will return to the Report Selection form.

Mail Merge

The **Mail Merge** option appears on the Report Viewer Menu Bar if the following conditions are met:

- Your school has letter activities related to students.
- The path to the letter is correctly designated in **Setup > System**.
- The report being previewed lists students.

When you click the **Mail Merge** option, all letter activities are listed as options. You can select the one with which to merge the data on the displayed report.



When you select to use the Mail Merge feature, you will be able to run the selected report, use the Merge tool to combine and print letters and update the student's activity record after processing the letter. The system will prompt you with a dialog box asking if you would like to update the Contact Manager. If you select **Yes**, then the student's Contact Manager history will be updated after the Mail Merge is completed.

Excel





This option exports the data on the report to an Excel spreadsheet. This feature appears on every report. The export procedure uses column names for headings. A maximum of 65,000 rows can be exported. However, Sub reports are not exported.

Navigation Tools

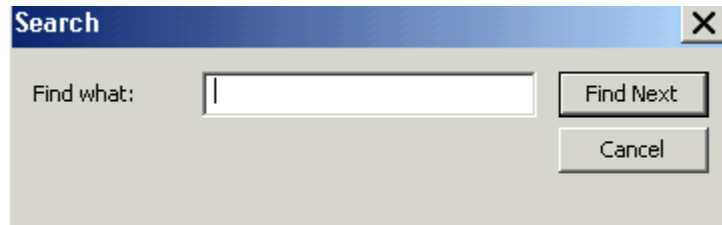
At the top of the Report Viewer form, there is a set of navigation tools to help you maneuver in a multi-page report. By clicking the appropriate tool, you can go to the first page of the report, the next page, the previous page, and the last page.



The following tools are available for selection:

- **Report Views:** The report viewer provides a method of narrowing your view of the previewed report. By double-clicking on a report heading or sub-heading, you can open a view containing only that heading and the data below it. When you open a view of a heading, the program creates a view tab at the top of the report. You can alternate between views until you get the information you require. You can also print only a selected view of the report.
- **Close Current View:** Click on the view to be closed and then click this control () to close it.
- **Group Tree:** On the left side of the Report Viewer is a control known as the Group Tree. It is used to drill down to specific portions of your report. It is more significant in long reports and in those that have more than one or two groups. Click on the plus and minus boxes beside the group names to expand or contract the tree list. Click on a tree item to go to that portion of the report.
- **Toggle Group Tree:** This tool () is used to show or hide the Group Tree. If you want to see more of the report page in your viewer window, hide the Group Tree by clicking this tool. Click it again to bring back the Group Tree.
- **Report Size:** Use this tool () to size the image of the report to a convenient viewing size. Select one of the options from the drop down list or type in your own percentage value.
- **Text Search:** Use this tool () to find the text that you need in the report preview by typing it in the Text Search box after clicking the binoculars. The program will find the first occurrence of the text in the report. If you click the binoculars again, it will find the next occurrence, and so on. Your search text entries are saved in a list so


that you can go back to them by clicking the arrow beside the text box. When you close the report, your search entries are discarded.



Report Printing

Report Printing is performed from the Report Viewer window after you have selected the various filtering criteria and clicked **Preview** in the Report Selection window.

To print a report in CampusVue:

- 1 In the **Report Viewer** window, click the **Print** icon () at the top of the window to open the **Print** dialog box. You can choose to print all of the report or selected pages. Indicate the number of copies of the report to be printed. Click **OK** to send the report to the printer.

Alternatively, select **Print** from the Report menu at the top of the Preview window. The report will be sent to your designated printer. If you want to change the destination printer, select a printer from the **Print Setup** dialog.
- 2 From the **Report** menu, select **Close** to close the Report Viewer window after the report is printed. You will return to the Report Selection window.
- 3 In the Report Selection window, you can choose to print another variation of the report by selecting different parameters. You can also save your previous selection of parameters by giving them a Preference Name and saving your preference for a later rerun.
- 4 Click **Close** on the Report Selection window to return to the CampusVue main window.

Cube Reports

The term "Cube Report" refers to a multidimensional, spreadsheet-style report that you can manipulate for the purpose of extracting data from the CampusVue database. An ordinary spreadsheet is two-dimensional in nature. As the term implies, a cube report can accommodate three or more (possibly hundreds of) dimensions in a report presentation. Each of the CampusVue modules has one or more cube reports associated with it. Data elements for the various cube reports are provided by the program in a form that you can readily use or not use as desired for a particular view. Flexibility is the key characteristic of cube reports. You can move data around on the report, adding or removing horizontal and vertical data elements to achieve the precise combination of rows and columns you need to present the results in the proper format.

The program gathers data for a cube report each time the report is opened. The data is stored in a temporary file while the cube is open. For large databases, this data gathering effort can take a while.

Output can be generated from cube reports in four forms:





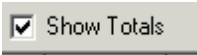
- On-screen displays in which rows and columns can be rearranged to suit your needs
- Printed spreadsheets with optional horizontal and vertical cross footed totals
- Charts and graphs
- Export files to Excel
- In the Contact Manager module, you can find an example of the cube report. The following **Activities Analysis** report is an example of the cube report

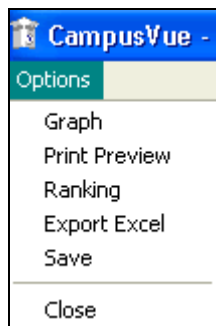
Category	Incident	Incoming Phone Call	Letter	Meeting	Message	Other Task	Outgoing Phone
Campus Management Institute	108	17	447	407	828	118	
Total	108	17	447	407	828	118	

To view a Cube Report:

- 1 From the Reports menu, select the department module **Contact Manager**. Then select the name option for the report to be printed. (Cube reports are listed at the bottom of each departmental reports menu.) The Report Selection form opens.
- 2 Some cube reports are set up with selection criteria and others are not. If selections are available, make whatever choices you like.
- 3 Click **Preview** on the Report Selection form to start the gathering of data for the cube report. The program will gather the basic building blocks of data for the cube. Be patient; this can take several minutes. There's a lot of work going on that you can't see.
- 4 When the program has assembled the necessary data, the cube report opens.

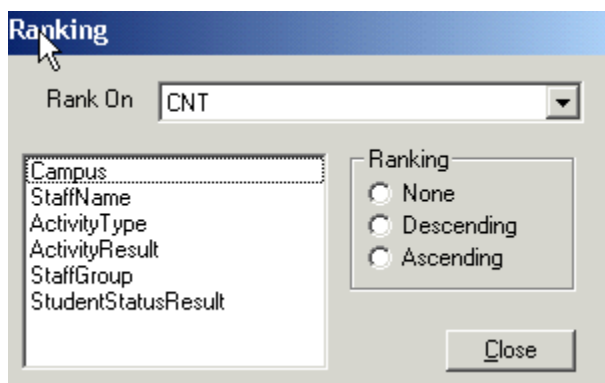
Across the top of the cube window are some important controls.

- **Preview:**  Shows you a preview of the printed report in spreadsheet format.
- **Graph:**  Takes you to the graph design feature. You need to select the data elements you want in the graph before clicking Graph. Ordinarily, you would not want to graph the totals along with the data cells. To select data cells to be graphed, click one corner of the range with the left mouse button, hold the button down and "drag" to the diagonally opposite corner of the range. All selected cells except the first one will be darkened.
- **Excel:**  Exports the cube report to an Excel spreadsheet. You can also select the parts of the report you want to export before clicking Excel. You will also export the totals unless you take action to do otherwise.
- **Exit:**  Closes the report and returns to the CampusVue work area.
- **Show Totals:**  You can elect to show or not show the totals on the report. If you want to export the data, you may not want to export the totals along with the data cells.
- **Options Menu:** When the cube report is opened in your work area, a new menu bar is added to the CampusVue window right under the title bar. It has one menu on it labeled **Options**.



The **Graph**, **Print Preview**, **Export Excel**, and **Close** options work like the corresponding options described in step 5 above. **Save** will save data from the report to a variety of file formats.

The **Ranking** option gives you the ability to rank (sort) data elements in the cube report in ascending or descending order.

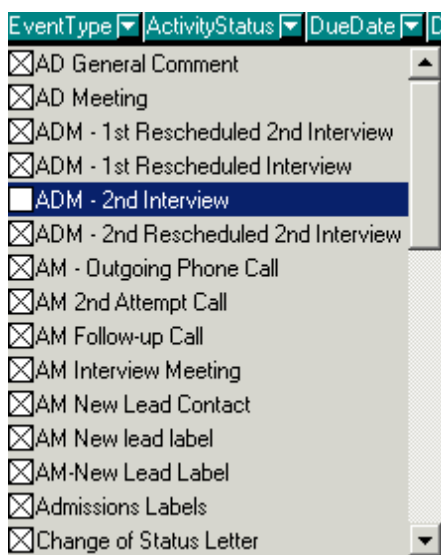


The example cube shows a three-dimensional report in a two-dimension format. Each row represents a student record. Subtotals and totals are shown for each row and column.

Notice the other data elements that have not been used in this particular view of the array. Any of these other data elements can be "dragged" to the horizontal or vertical axis of the grid. By doing so, you can change the report to an entirely different result.

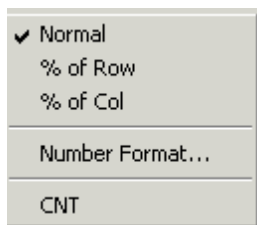


Another technique that you can use to tailor the cube is to select only portions of any one data element. For example, as we have done here, you can select only a few out of many **EventType**.



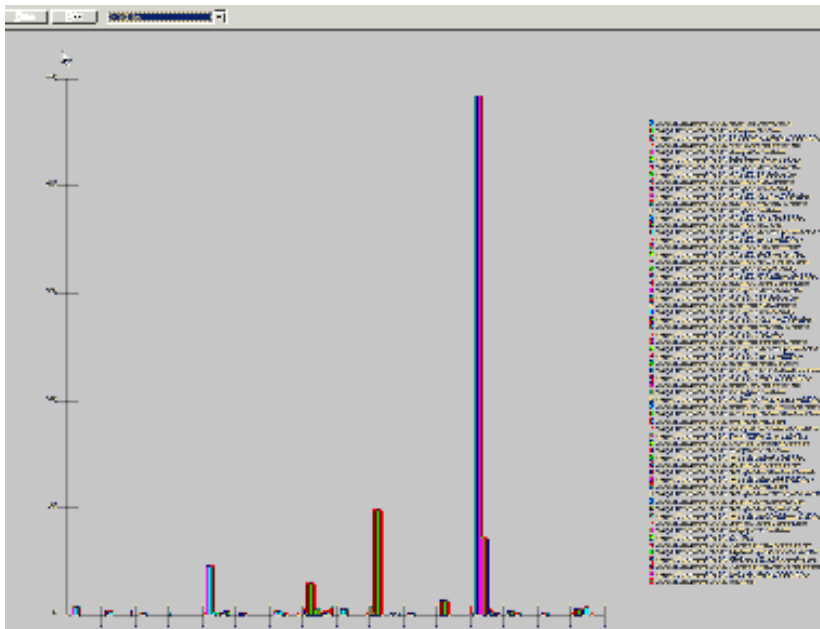
Click on the arrow beside the data element name. The list of codes, names, and so on, will be dropped down for your selection. Click the box beside each desired code or name. Those with X in the box will be used in your report. Those with blank boxes will not be used. To select all choices or to deselect all choices hold the Ctrl (Control) key down while selecting.

Right Click Options: If you right-click anywhere in the data area of the cube report, a menu appears with some important features listed.



- **Normal:** Causes the cube data to be displayed in its normal format. In the case of our example, it is contribution to the activity analysis sorted by student.
- **% of Row:** Changes the data format to be a percentage of the row total.
- **% of Col:** Changes the data format to be a percentage of the column total.
- **Number Format:** Allows you to change the format of the numbers in the data cells.
- **CNT:** This is the only option for the detailed data to be displayed. In other cubes, there may be more options listed here.

Graphing Data: For our example, we have chosen to create a three-dimensional bar graph. The illustrations show the selected data from the cube (totals have been turned off to facilitate the data selection) and the resulting graph. To select data cells to be graphed, click one corner of the range with the left mouse button, hold the button down and "drag" to the diagonally opposite corner of the range. All selected cells except the first one will be darkened.



To change the type of graph, click the graph style list in the upper right corner of the graph screen. Select any of the listed styles. Maximize the graph screen to see the labels clearly when you are working with many elements.

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