



CampusVue

Admissions

User Guide



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Preface

This document contains information about Managing Student Admissions in CampusVue. Information related to various “Folders” and “Forms” available under Admissions has been captured.

This document assumes that the reader knows the Windows environment, has used the CampusVue product, and understands basic school administration terminology.

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.

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

Introduction

The Admissions module of CampusVue provides mechanisms for gathering information about leads, recruiting and interviewing potential students, processing their applications, and enrolling them in your institution. As an adjunct to this process, your management can obtain valuable data about marketing expenses and advertising effectiveness.

The Contact Manager module plays a crucial interactive role in the activities of the Admissions Department staff. The tools in Contact Manager can be extremely useful for tracking the progress of leads through the recruiting process. For detailed information on the functions of the Contact Manager, refer to the *Contact Manager and Document Tracking* user guide or to CampusVue Help.

The purpose of this user guide is to familiarize you with the basic tasks commonly performed by Admissions personnel, such as those in the following list:

- Enter quick leads
- Add or edit information on the Student Master form
- Edit a student's education and employment history data
- Record students' inquiries
- Edit a student's applicant record data
- Schedule entrance test(s) and/or record results
- Enter additional data in customized school fields
- Post deposits received from students
- Record a student's transfer credit information
- Update student documents related to the Admissions process

Note: The ability to perform a particular task might require the appropriate level of CampusVue security permission. For more advanced information and answers to your questions, please refer to CampusVue *Help*.

Leads

A “lead” is a prospective student. To add a new lead to your database, you enter the information you have on a prospective student into a form to create a new student record. The student record can then be expanded or updated as you and others in your institution work toward enrolling that prospective student.

There are two forms for adding new leads:

1. the Quick Lead form (the “fast track”)
2. the Student Master form (accepts more complete student information)

Quick Lead

This short form for Quick Lead entry is intended for rapid entry of information on a person making an inquiry to your institution. The Quick Lead form captures contact information and other basic information designated as desirable by your institution. It can be used by receptionists, administrative support, or other staff members to gather data quickly, possibly prior to transferring an inquiry call to a recruiter or Admissions Representative.

When the Quick Lead form is saved, CampusVue writes its information to a Student Master form, thus creating a new student record (see Student Folder).

The screenshot shows a software window titled "Quick Lead - James, Todd". It contains several input fields for personal and contact information. On the left side, there are fields for First Name (Todd), Last Name (James), Telephone (717-717-2049), Lead Source (Florida Atlantic U. with a dropdown arrow), and e-Mail (james.todd@zip.net). On the right side, there are fields for Address (Finn Street, 201 Oxford Way with a dropdown arrow), Postal Code (-), City (Chicago), State (empty), Country (United States of America with a dropdown arrow), Interest (Marketing and Sales with a dropdown arrow), and Adm. Rep (James Astor with a dropdown arrow). At the bottom left, there is a checkbox labeled "Show Student Master after Save" which is checked, and a counter "Quick Leads Entered:0". At the bottom right, there are four buttons: "Review On", "Save", "Cancel", and "Close".

Note: The Quick Lead form can be customized to collect specific information and, for speedy data entry, to follow the flow of the typical inquiry conversation. For details, refer to the CampusVue Help topic “Quick Lead Form Design.”

The Quick Lead form works in two modes:


1. **Single lead entry mode** - allows you to save each lead after entering the information and close the form.

2. **Multiple lead entry mode** - allows you to enter one lead after another, saving a lead and clearing the form without closing it.

You can configure a system setting to determine the mode in which the form opens. You can also specify the default setting for the **Student Master after Save** check box.

To use multiple lead entry mode, you need to enable the check box. If you plan to enter more than one lead, regardless of whether this option is enabled by default, disable the single lead entry mode by clearing the **Show Student Master after Save** check box.

There are several ways to open the Quick Lead form.

- 1 Click the **Quick Lead** icon  on the toolbar.
- 2 Press **Ctrl+L**.
- 3 Select **File > Add New Lead**.

The form cannot be saved until all required fields have been completed – your institution will determine what minimum information is required to create a new student record.

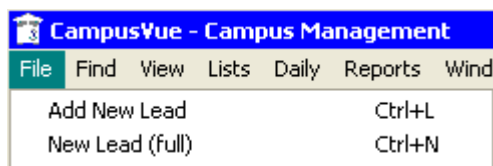
In the Quick Lead form pictured above, the First Name, Last Name, Lead Source, and Admissions Representative are required fields (signified by green backgrounds). The Telephone, e-Mail, Address, Postal Code, City, and State fields are “conditional required” fields. Their relationship is indicated by their blue backgrounds. An entry in *any one* of a group of conditional required fields will satisfy the requirement for the entire group. As the format of the Quick Lead form is customizable, so is the grouping of conditional required fields.

Note: The data recorded for a new lead should always pertain to the prospective student, *not* the person who might be making an inquiry on behalf of a prospective student.

New Lead (full)

An alternate method for creating a new student record is to start with a blank Student Master form.

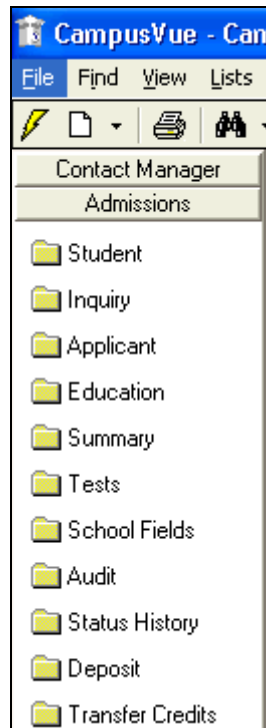
Select **File > New Lead (full)** or **Ctrl+N** to open a blank Student Master form



Enter the student information and click **Save** to create a new student record with the same new lead status as a Quick Lead.

Admissions Folders

Most work done as part of the Admissions process begins with the folders listed in the Admissions module of the Student Bar. These folders contain forms that are used to enter student data, record admission test results, track documents required from students, and post deposits received from students. The Admissions folders and forms are discussed individually in the following sections.



Note: You can also access the forms inside the Admissions folders by selecting **View > Admissions >** specific folder.

Student

The Student folder contains the Student Master form that was created when the initial lead information was saved.

Note: An indicator "Multiple Applications" appears on the Student Master form when more than one application record exists for a student. This flag allows Admissions personnel to determine if applications have been processed at more than one campus.

Student Master - Baig, Saba

Title		Student Number	434	PIN	
Last Name	Baig	First Name	Saba	Campus	Campus Management Institute
Middle Name		Suffix		School Status	New Lead
Nickname		Maiden Name		Lead Source	On-line Web application
Address			Lead Date	5/8/2008	07:08 PM
City	Manhattan	NY	10003	Lead Type	
Country	United States of America	<input type="checkbox"/> Bad Address		Last Activity Date	
Phone Number	(111) 111-1111	<input type="checkbox"/> Bad Phone		Adm. Rep	Able Baker
Work Phone		Ext.		Interest	
Other Phone		County		Program	
Mobile Phone	(214) 548-4848			Shift	
E-mail	abcd@leadsources.com		Expected Start		
Other email			Prev Education		
SSN		Gender		Agency/Sponsor	
Birth Date		Veteran	Unspecified	Instrument	
Marital Status		Disabled	Unspecified	Orig Start Date	
Ethnic Group		Nationality		Current LDA	
Citizen		Alien #		<input type="checkbox"/> Non-immigrant Student	<input type="checkbox"/> Data Block Indicator
Driv. Lic State		DL #		DBI Date	

Picture E-Mail SMS Multiple Applications Edit Close

Inquiry

The Inquiry folder permits you to track multiple inquiries from the same prospective student, because you only want to enter one Quick Lead per prospect.

Inquiry - Alexander, James

Lead Date	Lead Source	Program of Interest	Campus	Admitted
5/8/2008	Lead	Marketing/Advertising	Campus Management Institute	Yes

Lead Date: 5/8/2008 Program: Campus Management Institute

Lead Source: Lead Interest: New Lead

Response Phone: Response Time: Response Date: Admin. Rep: Diana Lewis

Lead Type: Original Admin. Rep:

Comment:

Rep. Assignment History Add/View Save Cancel Close

To add an additional inquiry, click **Add** to activate the fields in the lower part of the form. Click **Save** and then **Close** to add the new inquiry to the grid at the top of the form.

You can click the **Rep Assignment History** button to launch a form that displays the history of admissions representative assignments for the selected student. In addition, you can click the **Activities** button to launch the Contact History form, which displays a list of activities (contacts) related to the selected student.

Applicant

If your school has a multi-step application process that involves using the “Being Processed” status *category*, you can track the process in the Applicant folder. An applicant record is created for each student when the student's status category is changed from “Lead” to “Being Processed” (the category that marks the transition stage between being a lead and being officially enrolled). Selected information collected in the Applicant folder can be used to populate fields in the Enrollment wizard at the time the student is enrolled.

To create a new Applicant record:

- 1 Select **View > Admissions > Applicant** (or click on the Applicant folder under the Admissions tab on the student bar) to open the Applicant folder. The black border indicates an empty folder.

Applicant: Alexander, James

App Received Date: [] Enrollment Date: [] Expected Date: []

Last Activity Date: [] Pre-Admit Date: [] Inquire Date: []

Expected Start Date: [] Expected End Date: []

Status: [] Reason: []

Expected Post Term: [] Admissions Rep: []

Pending Enrollment #: []

Status Help Add Documents Save Cancel Print

- 2 Click the **Add** button to activate the fields on the Date/Status tab.
- 3 Fill in the available date information on the student's application process.
- 4 Click the down arrow by the **Status** field and change the student's school status according to your school's application policy (the Reason field populates automatically). Provide the expected start term (if known), and the Admissions Rep's name. The system will populate the Status Date and Pending Enrollment # fields.
- 5 Click **Save** to create the new Applicant record in the grid at the top of the form. The border color changes to indicate that the student is now in the Being Processed status category.

Applicant: Alexander, James

App Received Date: 7/17/2006 Enrollment Date: 7/24/2006 Expected Date: 8/5/2006

Last Activity Date: [] Pre-Admit Date: [] Inquire Date: []

Expected Start Date: [] Expected End Date: []

Status: Applicant Received Reason: []

Expected Post Term: 2006 Fall Admissions Rep: John Lee

Pending Enrollment #: 06034L0510

Status Help Add Documents Save Cancel Print

- 6 With the Applicant record highlighted, click **Edit** to enter information on the remaining tabs:
- 7 **Pending Enrollment Info:** Information entered on the Pending Enrollment tab can be uploaded into the Enrollment Wizard to expedite the enrollment process.
- 8 **Comment:** Enter any comments related to the applicant record
- 9 **Application:** View and edit custom applications that you have created at **Lists > Admissions > Application**.

Education

The Education folder contains the student's education and employment history. Drop-down lists permit you to select the student's high school, college(s), and current employer. These lists are maintained as follows:

High schools: **Daily > Admissions > High Schools**

Colleges: **Lists > Admissions > Colleges**

Employers: **Daily > Career Services > Employers**

Education: Alexander, Jane

Prev Education Prev. Education GPA

High School ☐ Graduated

Graduation Session HS Grad Date

HS Grad Year Date of Enrollment Last Date Attended

Rank Of Transcript Type Level

College(s)

Code	State	Name

Employer

Employment Status


Address

Comments

Transcript Request Info.

TranscriptContact TranscriptFee

To add or edit a student's high school details:

- 1 Select the student's previous educational achievement from the **Prev. Education** drop-down list. This field may already be populated if the student's previous education was provided in the Student Master form.
- 2 For the **High School** field, click the associated **Search** button  to find the student's high school. Double-click the high school name in the search results to select it.
- 3 Enable the **Graduated** check box to indicate whether the student has graduated (leave it blank for a student who earned a GED).
- 4 Enter additional information about the student's high school: dates, GPA, rank, etc. If you tab out of the **HS Grad Date** field, the system will automatically fill in the **HS Grad Year**.
- 5 In the **HS Grad Date** field, enter or select the date the student graduated from high school. Click **Tab** to automatically fill in the **HS Grad Year** field based on the graduation date. However, if the graduation date is unknown, you can enter or select the year the student graduated in the **HS Grad Year** field.

To add or edit a student's college details:

- 1 Click **Add College** to enter any colleges that the student has attended.
- 2 Click **Edit College** to edit information about a college already entered.
- 3 Click **Delete College** to remove a college from the student's folder.
- 4 If a transcript request has been made, the **Transcript Contact** and **Transcript Fee** will appear in the fields at the bottom of the form.

To add or edit a student's employment details:

- 1 Click the **Search** button at the end of the **Employer** field to open the employer search form. Double-click the employer's name in the search results to select it. The employer's address and any associated comments will appear in the **Comments** and **Address** fields.

Note: If the employer is not available from the list, click the **Add Employer** button on the right of the search form. Typically, the employer database is maintained by the Career Services department.

- 2 Select the appropriate employment status from the **Employment Status** drop-down list.
- 3 Click **Save** on the Education form to save your changes (or click **Cancel** to discard your changes) and click **Close** to close the form.

Summary

The Admissions Summary folder offers a “bird’s-eye view” of the student’s application. If more than one application is in progress, the form tracks the most current.

The screenshot shows a software window titled "Admissions Summary: Alexander, Jane". It contains several input fields and summary buttons. The fields are: Name (Alexander, Jane), Lead Date (6/23/2006), City (Tyler, TX), Status (Application Receive), and Application Status (Requested - Require). Below these are six summary buttons, each with a label and a count: Activities (4 Contacts, 1 Open), Historical Activities ((No historical activities have been found)), Document Tracking (5 Documents, 5 Open), Entrance Tests (1 Tests, 1 Untaken, 0 Failed), and Addresses (1 Addresses/References on file). A Close button is at the bottom right.

Field	Value
Name	Alexander, Jane
Lead Date	6/23/2006
City	Tyler, TX
Status	Application Receive
Application Status	Requested - Require

Category	Summary
Activities	4 Contacts, 1 Open
Historical Activities	(No historical activities have been found)
Document Tracking	5 Documents, 5 Open
Entrance Tests	1 Tests, 1 Untaken, 0 Failed
Addresses	1 Addresses/References on file

The form itself is not interactive, but it offers access to the sources of the information it tracks:

Activities: current Contact Manager activities pertaining to the student’s application. Click the **Activities** button to open the student’s Activities folder and view the Contact History, add or edit activities.

Historical Activities: also part of the Contact History, these are activities with older due dates

Document Tracking: the number and status of the Admissions documents in the student’s Documents folder. Click the **Document Tracking** button to open the student’s Documents folder. Select **Admissions** from the Module drop-down list to display just the Admissions-related documents.

Entrance Tests: a summary of the student’s performance relative to the entrance tests that have been entered in the student’s Tests folder. Click the **Entrance Tests** button to open the Tests folder and view, add, or edit test information.

Addresses: pulls summary information from the student’s **Addresses** folder. Click the **Addresses** button to open the **Addresses** folder and add or edit addresses.

Tests

The Tests folder displays information on the entrance tests taken or required to be taken by the prospective student. A student’s previous education or desired program of study may be used to determine which tests and scores will qualify the student for admission.

Entrance test requirements are set up at **Lists > Academic Records > Programs**. You can associate a required entrance test(s) to a particular program and enter a required minimum score for each test selected.

Once a test or tests are selected for the program, the tests will be tracked for any lead or student for whom the program is selected. This means that if the program is selected for a new lead, the program-related tests will be listed in the lead/student's Tests folder. Enrollment in the program is not a requirement for the tests to be listed in the Tests folder.

To add an entrance test to a student's record:

- 1 Select a program from the **Applicant** drop-down list at the top of the form.
- 2 Click the down-arrow by the **Test** field and select a test from the list.

Description	Code
JTPA Required Exam	JTPA
Law Schools Admissions Test	LSAT
SAT	SAT
SAT Test	SAT2
Skills Assessment	SKILLS
Wonderlic #1	WON1

If the desired test is not in the list, you can add it at **Lists > Admissions > Tests**.

- 3 Modify or verify the remaining fields as required (some may be populated automatically depending on the test selected):

- **Scheduled Exam Date:** the date on which the exam was originally scheduled.
- **Date:** the date on which the student actually took the exam.
- **Exam Fee Amount:** the amount of the fee to be paid by the student for the exam.
- **Exam Location:** the exam location
- **Test Score:** a free-text field for entering the student's score

- 4 Check or clear the **Required** box as necessary.
- 5 Check the **Exam Fee Paid by Student** box if the fee was received.
- 6 Click **Save** to save your changes or click **Cancel** to cancel your changes.
- 7 Click **Close** to close the form.

School Fields

The School Fields folder contains a form that is set up by your System Administrator to collect custom information that is not captured elsewhere by the generic CampusVue application.

The form below is but one example of a customized School Fields folder:

The screenshot shows a web-based form titled "Dazzling, Color - Admissions - School Fields". The form is organized into two columns of fields. The left column includes: "Instrument" (text box with "Tuba"), "Direct Mail" (text box), "Second Rep" (dropdown menu), "Locker Number" (text box with "M405"), "Mother's Maiden Name" (text box with "Brown"), and "Other Degrees" (dropdown menu). The right column includes: "High School GPA" (text box with "3.5"), "Credit Checked" (text box with "05/08/20"), "In Collections" (text box with "N"), "Collections" (text box), "Parking Assignment" (text box), and "LM Comment" (text box with "He is a good boy. Cut him some"). At the bottom right of the form are three buttons: "Save", "Cancel", and "Close".

Some fields on the form may be viewed but not edited in your department. At least one department has the authority to change each field.

To view or edit school fields:

- 1 Click the down-arrow by the field that you want to change. Select an option or enter data to edit the fields.

Note: The fields appear in edit mode (white background) if your department has been given permission to change the data. Fields that are "dimmed" cannot be changed. Fields that are listed but are gray and show no data indicate that they have not yet been populated by the staff member responsible for doing so.

- 2 Click **Save** to save any changes you make to editable fields.
- 3 Click **Cancel** to close the form without saving any changes.

Audit

The Audit folder is another example of a read-only folder that collects its information from other parts of the student record. This folder displays the history of changes made to significant fields elsewhere in the Admissions module of CampusVue. You can use the scroll bars to browse the list of audit records for the selected student, but you cannot make changes to this form.



The screenshot shows a window titled "Admissions Audit: Abbott, Victoria". Inside is a table with the following columns: Property, Old Value, New Value, Date Changed, and Enrollment Description. The table contains 17 rows of audit data.

Property	Old Value	New Value	Date Changed	Enrollment Description
Social Security Num	569-45-1665	569-55-8956	2/2/2000	
Adm. Rep		Able Baker	2/8/2000	
Phone Number		(213)555-8899	3/23/2001	
Lead Date	12/22/1999	01/22/2001	8/22/2001	
Lead Date	01/22/2001	08/01/2001	8/22/2001	
Lead Date	08/01/2001	04/02/2001	8/22/2001	
Lead Type		Phone In	8/22/2001	
Enroll Status	Less Than Half Tim	Half Time	7/2/2002	Bach. of General Management
Enroll Status	Half Time	Less Than Half Tim	9/9/2002	Bach. of General Management
Enroll Status	Less Than Half Tim		10/23/2002	Bach. of General Management
Enroll Status		Less Than Half Tim	10/8/2003	Bach. of General Management
Original Exp. Grad	Jan 1 1900 12:00	Dec 23 2003 12:00	9/23/2004	Bach. of General Management
Advisor	Able Baker		4/9/2004	Financial Aid Advisor
Advisor	Able Baker		4/9/2004	Financial Aid Advisor
Advisor	Able Baker		4/9/2004	Financial Aid Advisor

Status History

The Status History folder displays the changes in the student's school status as the student progresses through the Admissions process and beyond. Given the proper authority, you can also add or even reverse a status change.

Alexander, Jane - Status Change History

☐ Admissions
☒ Applicant

Facilities Management

Current Status: Application Received Change

School Status			Enrollment Status		
New Status	Prev. Status	Date Added	Begin Date	Stored LDA	System User
Application Received	New Lead	7/17/2006	7/17/2006		A Campbell

Comment: Added Applicant record

Print Undo Close

To work with the Status History for a given student:

- 1 In the top left corner, select either the **Admissions** radio button (permits viewing only) or the **Applicant** radio button to view or edit student status.

Note: The **Change** and **Undo** buttons are enabled in Applicant mode only.

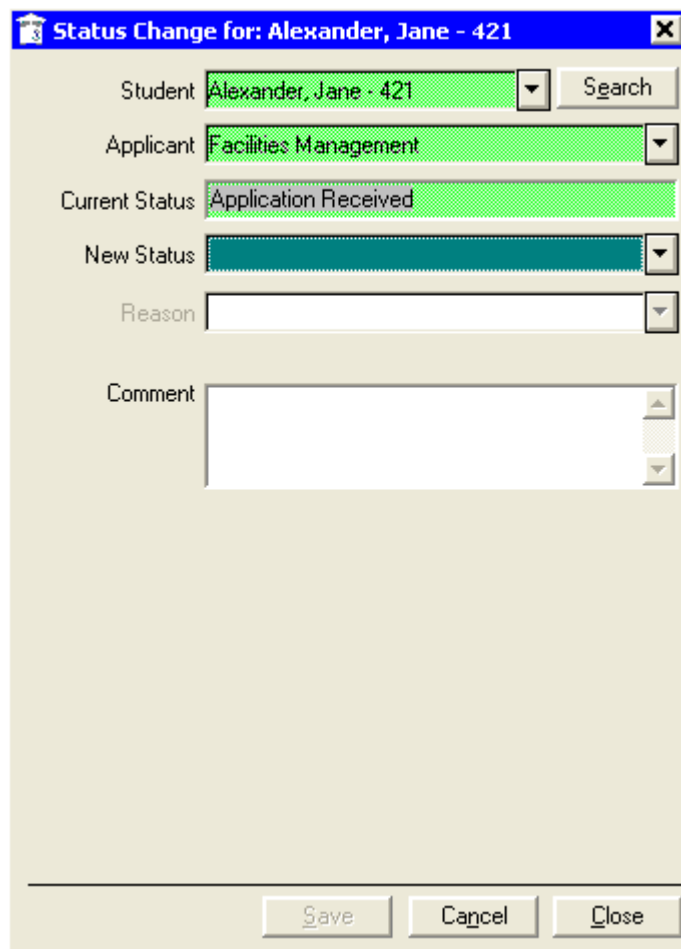
- 2 The student's information regarding school-defined status changes appears in the grid on the **School Status** tab, and the student's information regarding enrollment status changes appears in the grid on the **Enrollment Status** tab. Both tabs use columns defined as follows:

New System Status: this column shows the status after the change

Previous System Status: this column shows the status prior to the change.

Notice that you can click each column heading to sort the list by the data in that column. The default displays the latest change on top.

- 3 If you need to make a status change (changes can only be made if the **Applicant** option is selected), click **Change** to display the Status Change form. You cannot change Admissions statuses once the student is enrolled. The system will allow only one status record for a date. If there is already a status record for a date, you must update the status rather than writing a new record.



The dialog box is titled "Status Change for: Alexander, Jane - 421". It contains the following fields and controls:

- Student:** A dropdown menu showing "Alexander, Jane - 421" and a "Search" button.
- Applicant:** A dropdown menu showing "Facilities Management".
- Current Status:** A dropdown menu showing "Application Received".
- New Status:** A dropdown menu with a teal background.
- Reason:** A dropdown menu.
- Comment:** A text area with a scroll bar.
- Buttons:** "Save", "Cancel", and "Close" at the bottom.

- 4 Confirm or correct the information in the form.
- 5 Select the **New Status** from the drop down list.
- 6 Select a **Reason**, if required, from the drop-down list.
- 7 Enter any **Comment** that is necessary to explain the change.
- 8 If an **Effective Date** field appears (default is the system date), confirm or correct the date as required.
- 9 Click **Save** to save your status change. If you have selected a new status that is in the Enrollment category, clicking **Save** will open the Enrollment Wizard. Refer to the user guide *Managing Admissions* or to CampusVue Help for information on enrolling students.

To undo a status change:

- 1 Select the most recent change and click **Undo**.

Note: Only the latest status change can be undone. If you need to undo more than one status change, you must undo the status changes in order from the most recent to the oldest.

- 2 A message box will appear to confirm that you want to undo the status change. Click **Yes** to confirm that you want to undo the status change. The program will return the student to the previous status.
- 3 Click **Print** to print a Status Change History Report.
- 4 Click **Close** to close the Status Change History form.

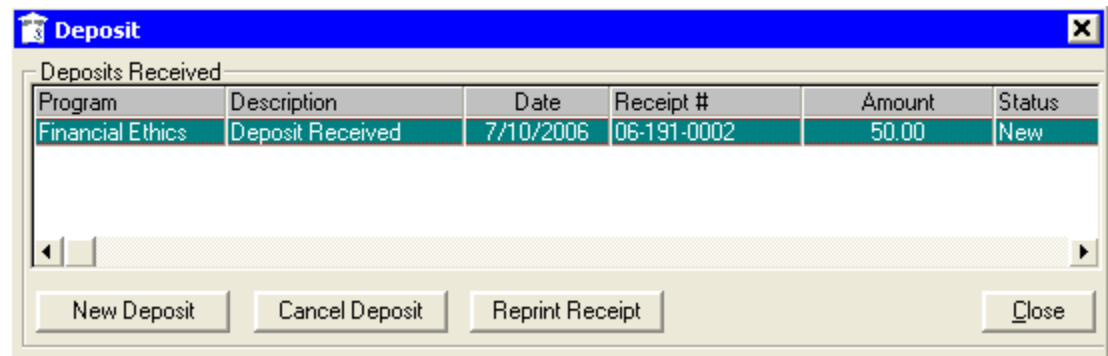
Deposit

The Deposit folder provides a mechanism for the Admissions department to receive deposits from students and provide printed receipts. Depending on your business practices, deposits may include application fees, registration fees, enrollment fees, tuition deposits, etc. These deposits will be gathered by the Post Deposits process in Student Accounts for posting to student ledger cards.

To record a deposit:

- 1 Select **View > Admissions > Deposit**.

If the student has deposits on file, the folder will open to a grid:



The screenshot shows a window titled "Deposit" with a close button (X) in the top right corner. Below the title bar is a tab labeled "Deposits Received". Inside the window is a table with the following data:

Program	Description	Date	Receipt #	Amount	Status
Financial Ethics	Deposit Received	7/10/2006	06-191-0002	50.00	New

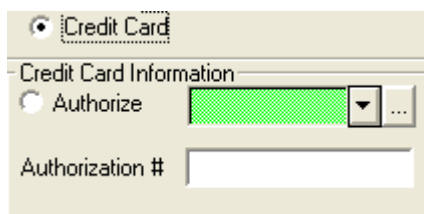
Below the table is a horizontal scrollbar. At the bottom of the window are four buttons: "New Deposit", "Cancel Deposit", "Reprint Receipt", and "Close".

- 2 Click **New Deposit** to open a form for recording a new deposit (the Deposit form opens automatically if there are no deposits on file for the student).


- 3 Confirm or correct the information that appears.
- 4 The **Date** defaults to the system date; correct as required.
- 5 Enter the **Amount**.
- 6 Specify a **Transaction code** for the deposit. Only transaction codes with the **Allow Deposits** property set to “True” will be available on the drop-down list.
- 7 Select the **A/Y (Academic Year) Sequence** and **Term** for the deposit (if known).
- 8 Select a Payment type. The options are Cash, Check, or Credit Card.

If you select the **Check** payment type, a field will appear for entering the check number.


If you select the **Credit Card** payment type, the system will change the form to show the **Credit Card Information** fields and buttons.



The form is titled "Credit Card" and contains a section "Credit Card Information". Inside this section, there is a radio button labeled "Authorize" which is selected. To its right is a green drop-down menu with a downward arrow and an ellipsis button. Below this is a text field labeled "Authorization #".

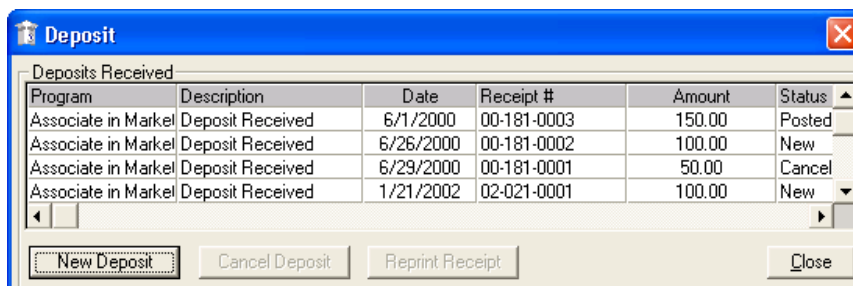
Select a credit card from the drop-down list. If there is no correct option on the list, you can add one by clicking the ellipsis  button to open the Credit Card Info form. Enter all requested information and click **Save**. The **Authorize** button is enabled and an authorization number is required to save the credit card payment.

Note: The list of credit cards accepted for making payments on this student record is maintained at **View > Student Accounts > Payment Info**.

- 9 Select a **Paid By** option from the drop-down list box. These options come from the student's Addresses list. If there is no correct option on the list, you can add one by clicking the ellipsis  button to open the Addresses data entry form.
- 10 If you want a receipt, select "**Print receipt after save**."
- 11 Click **Save** to save the admissions deposit.

Note: If the Posting Admissions Deposits Flag is set to **Current Campus**, you can only post deposits for a student at the Current Campus. If you try to post deposit transactions for students at another campus, you will receive a message indicating that you are not signed into the campus and posting is not allowed. If the Posting Admissions Deposits Flag is set to **Any Campus**, you can post deposits for a student at any Campus. This parameter is set by the System Administrator at **Setup > Student Accounts > General**.

To work with existing deposits:



The form is titled "Deposit" and contains a table labeled "Deposits Received". The table has six columns: Program, Description, Date, Receipt #, Amount, and Status. Below the table are four buttons: "New Deposit", "Cancel Deposit", "Reprint Receipt", and "Close".

Program	Description	Date	Receipt #	Amount	Status
Associate in Market	Deposit Received	6/1/2000	00-181-0003	150.00	Posted
Associate in Market	Deposit Received	6/26/2000	00-181-0002	100.00	New
Associate in Market	Deposit Received	6/29/2000	00-181-0001	50.00	Cancel
Associate in Market	Deposit Received	1/21/2002	02-021-0001	100.00	New

If a deposit was recorded in error and its status is New, you can select it and click **Cancel Deposit** to cancel it. Click **Yes** on the confirmation message.

Select a deposit and click **Reprint Receipt** to reprint the receipt. Click **Yes** to confirm.

Click **Close** to close the Deposit form.

Transfer Credits

The Transfer Credits folder contains information on courses that the student has requested be evaluated for possible transfer credit from other colleges. You can use the Transfer Credits form to view or modify transfer credit information.

To enter a course for transfer credit for an incoming student:

- 1 Click **Add** to open the Transfer Credits form.

- 2 Click the search icon (binoculars) to search for the college where the course was taken. If the college is not listed and you have the necessary access, click **Add College** to display a form to add the college.

Colleges

College Info. | Transcript Office | Comment | Courses

Code: TAMUC ☒ Active

Name: Texas A&M University - Commerce

Address:

City:

Country:

Phone Number: Fax:

- 3 Click the search icon (binoculars) to search for the course. If the course is not listed and you have the necessary access, click **Add Course** to display a form to add the course.

College Course

Code: Active ☒

Description:

Start Date: End Date:

Credits: Minimum Grade Required:

- 4 Enter a unique **Code** for the course (typically the course number from the source school).
- 5 Enter a **Description** (typically the course title).
- 6 Enter the **Start Date** (the date the student began the course) and the **End Date** (the date the student finished the course).
- 7 In the **Credits** field, enter the credit value of the course at the source school.
- 8 Enter the **Minimum Grade Required** by your institution in order to award transfer credit for the course.
- 9 Click **Save** to update the **Transfer Credits** form.

Transfer Credits

College Course

College: TAMUC Texas A&M University - Commerce Add College

College Course: ENG101 English Composition I Add Courses

Min Grade: B Grade Received: Date Completed: 12/15/2005

Start Date: 9/3/2005 End Date: 12/15/2005

Credits: 3 Description: English Composition I

Transfer Info

Campus Course: Grade: Credits To Transfer: In Degree Audit? Term: Grade: Comments:

Save Cancel Close

- 10 Enter the student's **Grade Received** and the **Date Completed**.
- 11 In the lower part of the form, select (from your school's course list) the course for which the student is requesting transfer credit. The **Credits to Transfer** field will be updated.

Transfer Credits

College Course

College: TAMUC Texas A&M University - Commerce Add College

College Course: ENG101 English Composition I Add Courses

Min Grade: B Grade Received: A Date Completed: 12/15/2005

Start Date: 9/3/2005 End Date: 12/15/2005

Credits: 3 Description: English Composition I

Transfer Info

Campus Course: Business English Credits To Transfer: 3

Status: SUBMITTED In Degree Audit? ☐

Term: Grade: Comments:

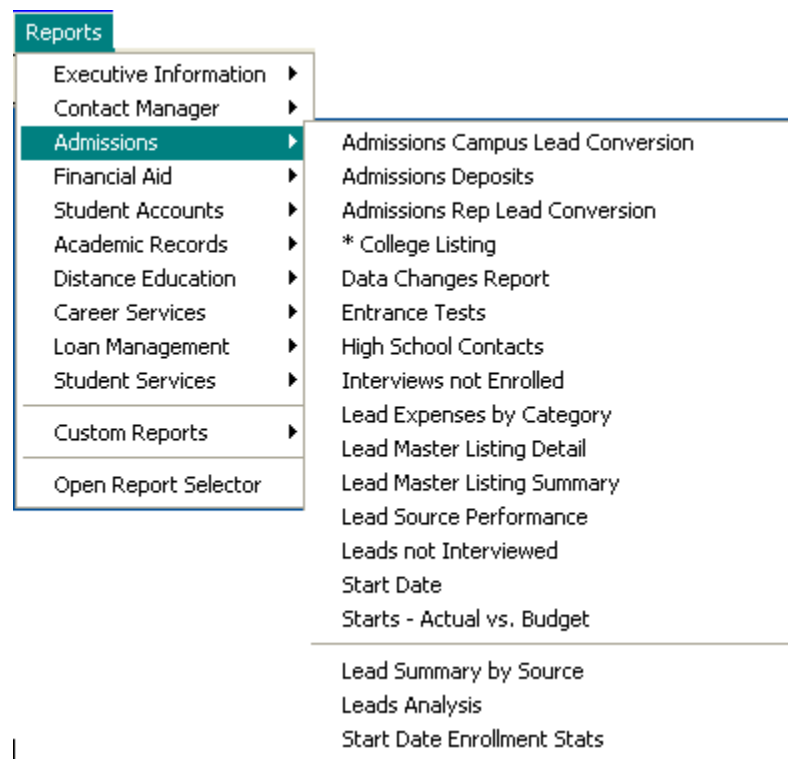
Save Cancel Close

- 12 Select the **Status** of the transfer credit request.
- 13 Click **Save** to add the request to the student's **Transfer Credits** folder.
- 14 Requests for transfer credits will be reviewed by the Academics department. If they approve the request, they will change the status of the request to "Approved" and update the folder.

Admissions 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.

Click **Reports > Admissions** to access reports associated with the Admissions module.



An asterisk (*) indicates a custom report designed for your institution(s). 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 an entirely new report. In the Reports menu above, the “College Listing” report is an example of a custom report.

Select **Report > Open Report Selector** (at the bottom of the reports menu) to see a comprehensive list of all the reports you have access to run in all departments.

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:

Entrance Tests

mt_AmEntranceTests.rpt
ADMINISTRATORCampus:
Campus Management Institute
- School Status (all)

Sorted by: Campus, Test, Student Name

Name Student ID	Status	Lead Bro- Lead Date	Exam Fee Amount	Pre-Ed Agency	App Fee- Start Date	Program Exam Location	Test Score	Test Score	Date Sched. Date Taken
Campus Management Institute									
JTPA Regional Exam									
Abbate, Karen A. 0903A000000	A	CMM 4/26/2001	H S	5/20/2005 5/26/2002	55M D	JTPA			
Abbate, Karen A. 0903A000000	A	H S	5/20/2005 5/26/2002	55M D	JTPA				
Abbotson, Craig C. 0105A000000	ATT	ICIR 5/4/2001	Adams, Ryan A. H S	5/20/2005 5/26/2002	55M D	JTPA			
Adams, Ryan A. 0005A000000	PROB	55 12/7/1995 0.00	Adams, Craig C. H S	5/20/2005 5/26/2002	55M D	JTPA			
Adams, Gary M. 0004A000000	BP	55 5/1/2001	Adams, Ryan A. H S	5/20/2005 5/26/2002	55M D	JTPA			
Adams, Jodi 0903A000000	ATT	WES 3/1/2001	Adams, Gary M. H S	5/20/2005 5/26/2002	55M D	JTPA			
Adams, John G. 0903A000000	BP	33 4/23/2001	Adams, Jodi H S	5/20/2005 5/26/2002	55M D	JTPA			
Adams, Jeff 0903A000000	ATT	33 5/1/2001	Adams, John G. H S	5/20/2005 5/26/2002	55M D	JTPA			
Adams, Diana 0004A000000	BP	55 5/1/2001	Adams, Jeff H S	5/20/2005 5/26/2002	55M D	JTPA			

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.)

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

If the report is displayed as an HTML document, 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 Admissions report:

- 1 Select **Reports > Admissions > specific report**.
- 2 In the Report Selection form that opens, select the search parameters that will satisfy your reporting requirements.

The following screen displays the Report Selection form for the **Entrance Tests** report.

Report Preview

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

The following screen displays the Report Viewer form for the **Entrance Tests** form.

Report Viewer Controls

Report

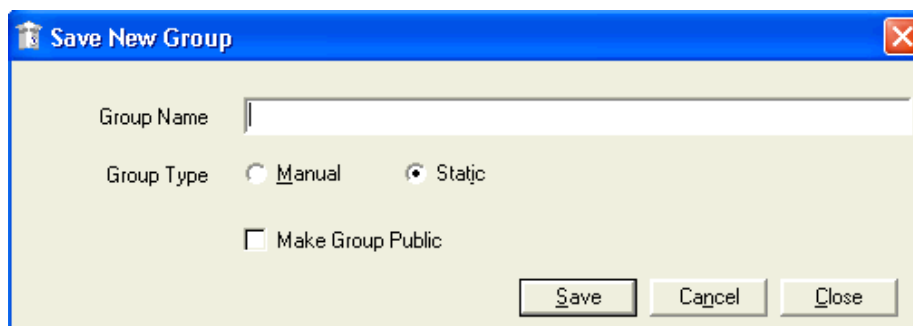
The **Report** menu on the Report Viewer form provides for printing the report, printer setup, exporting the report to other applications such as Excel, and closing the viewer window. The following options are available on the Reports menu:

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:

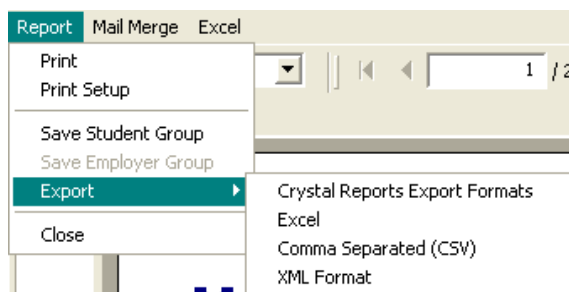


The "Save New Group" dialog box has a blue title bar with a close button. It contains a text field for "Group Name", a "Group Type" section with radio buttons for "Manual" and "Static" (where "Static" is selected), and a checkbox for "Make Group Public". At the bottom right are "Save", "Cancel", and "Close" buttons.

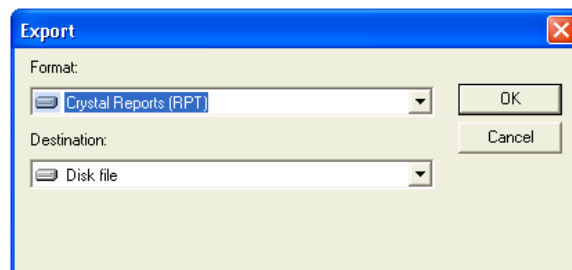
In this example, the default definition for the new student group is a "Static" group, meaning that the list of names in the group can be refreshed on demand (your school can also choose manual for the default group definition). You can also open the group via View/Student Groups and change the group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

Save Employer Group: If the internal Campus Id and internal Employer Id are contained in the record set for the report, you can save the employers listed on the report as a group. Select this option and give your group a name.

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.



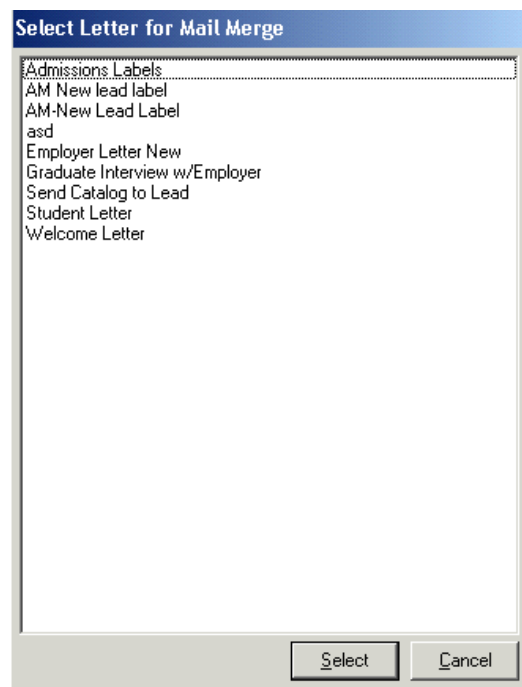
Close: You can select this option to close the Report Viewer form. You can do this before or after you print the report. The program will return to the Report Selection form.

Mail Merge

The **Mail Merge** option appears on the Report Viewer Menu Bar if the following three 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 History. If you select **Yes**, then the student's Contact 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. Sub (drill-down) 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.




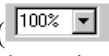
The following tools are available for selection:


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.

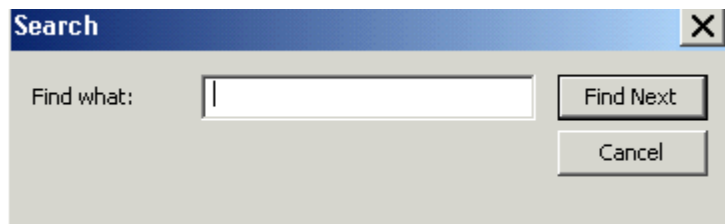
Group Tree: On the left side of the Report Viewer is a control known as the Group Tree. It is used to drill down to specific portions of your report. It is more significant in long reports and in those that have more than one or two groups. Click on the plus and minus boxes beside the group names to 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 Preview** window, click the **Print** icon () at the top 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.
- 2 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.
- 3 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.
- 4 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.
- 5 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.

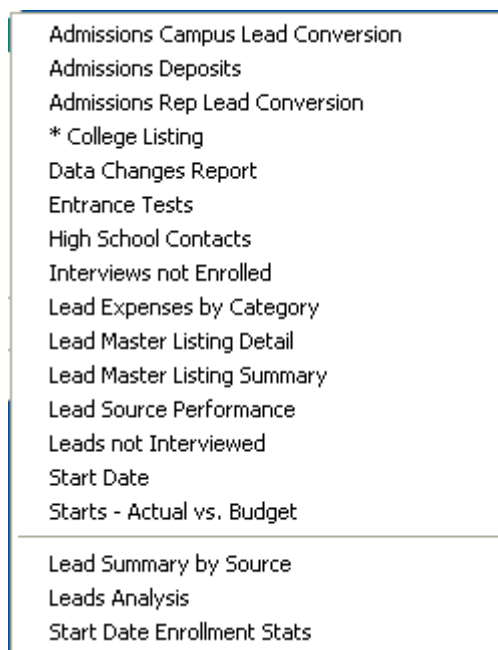
Output can be generated from cube reports in four forms:

1. On-screen displays in which rows and columns can be rearranged to suit your needs
2. Printed spreadsheets with optional horizontal and vertical cross-footed totals
3. Charts and graphs
4. Export files to Excel

In the Admissions module, the **Leads Analysis** report is an example of a cube report.

To view a Cube Report:

- 1 Select **Reports > Admissions**. Then select a cube report from below the horizontal line at the bottom of the list:





← **Cube Reports**


- 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.

Year	Semester	Grade	Subject	Score	Total
2015	1	10	Math	10	10
2015	1	10	Science	10	10
2015	1	10	History	10	10
2015	1	10	English	10	10
2015	1	10	Art	10	10
2015	1	10	Music	10	10
2015	1	10	Physical Education	10	10
2015	1	10	Foreign Language	10	10
2015	1	10	Elective	10	10
2015	1	10	Total	10	10

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

Preview:  Shows you a preview of the printed report in spreadsheet format.

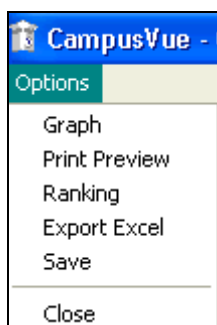
Graph:  Takes you to the graph design feature. You need to select the data elements you want in the graph before clicking Graph. Ordinarily, you would not want to graph the totals along with the data cells. To select data cells to be graphed, click one corner of the range with the left mouse button, 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.

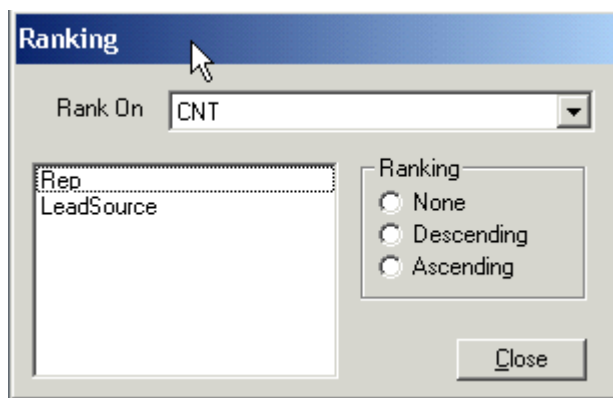
Show Totals: ☒ Show Totals You can elect to show or not show the totals on the report. If you want to export the data, you may not want to export the totals along with the data cells.

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.

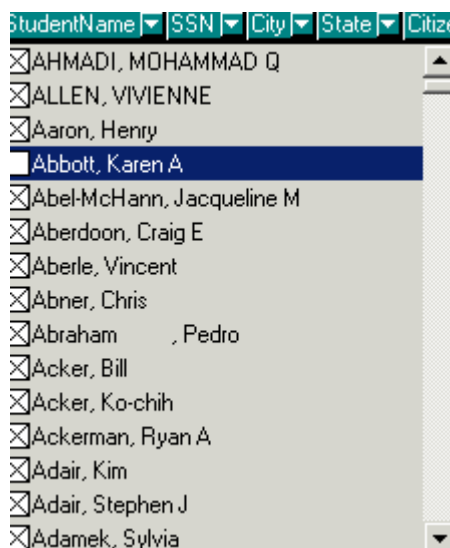


The example cube shows a three-dimensional report in a two-dimension format. Each row represents a student record. Subtotals and totals are shown for each row and column.

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.



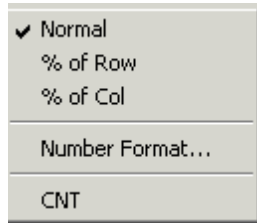
Another technique that you can use to tailor the cube is to select only portions of any one data element. For example, as we have done here, you can select or deselect student names.



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.

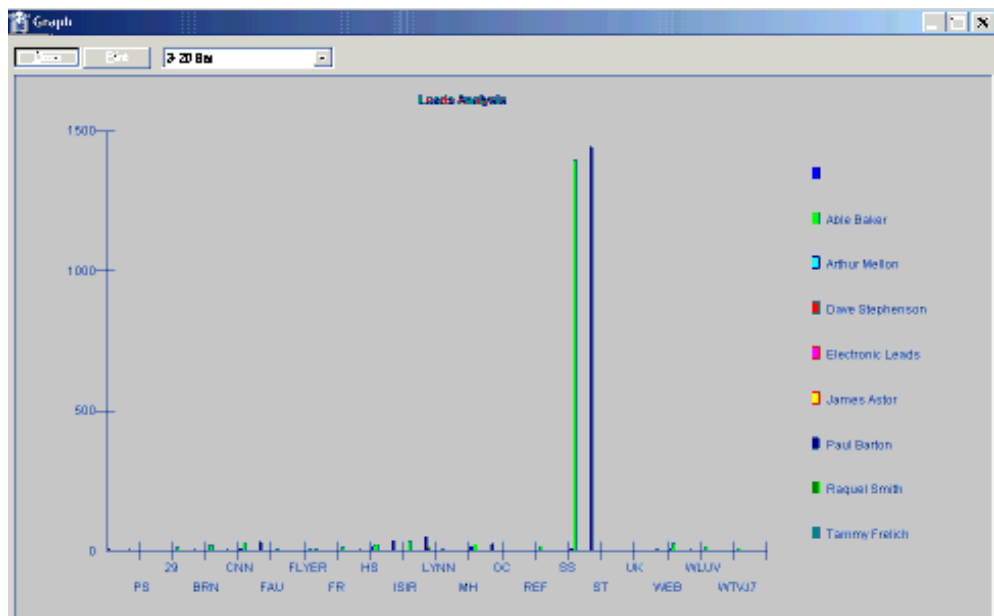
% of Row: Changes the data format to be a percentage of the row total.

% 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 displaying the detailed data. 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 down arrow by the graph style field in the upper left corner of the graph screen. Maximize the graph screen to see the labels clearly when you are working with many elements.

Export to Excel: The same data can be exported to Excel as the example below shows. The column headers have been formatted manually after the import to improve the look of the example.

[illegible]

Preview: The Preview of the cube report from the cube is shown here with totals included.

The screenshot shows a spreadsheet titled "Leads for 2001". The spreadsheet contains a table with 15 columns and 11 rows of data. The columns are labeled as follows: "Date", "Day", "Year", "Age", "Sex", "Marital Status", "Education", "Income", "Occupation", "Religion", "Ethnicity", "Housing", "Transportation", "Hobbies", "Pets", and "Other". The rows represent individual leads, with the first row being a header row. The data is as follows:

Date	Day	Year	Age	Sex	Marital Status	Education	Income	Occupation	Religion	Ethnicity	Housing	Transportation	Hobbies	Pets	Other
1/1/2001	1	2001	35	F	M	HS	15000	Teacher	Catholic	White	Own	Car	Reading	1	None
1/2/2001	2	2001	42	M	M	BS	25000	Engineer	Protestant	White	Rent	Truck	Golfing	2	None
1/3/2001	3	2001	28	F	S	HS	12000	Nurse	Jewish	White	Own	Car	Shopping	0	None
1/4/2001	4	2001	55	M	M	MS	30000	Doctor	Muslim	Black	Rent	Truck	Fishing	3	None
1/5/2001	5	2001	30	F	S	HS	18000	Sales	Buddhist	Asian	Own	Car	Traveling	1	None
1/6/2001	6	2001	40	M	M	BS	22000	Manager	Catholic	White	Rent	Truck	Gardening	2	None
1/7/2001	7	2001	38	F	M	HS	16000	Teacher	Protestant	White	Own	Car	Reading	1	None
1/8/2001	8	2001	50	M	M	MS	35000	Executive	Jewish	White	Rent	Truck	Golfing	3	None
1/9/2001	9	2001	25	F	S	HS	10000	Student	Buddhist	Asian	Own	Car	Traveling	1	None
1/10/2001	10	2001	45	M	M	BS	20000	Manager	Catholic	White	Rent	Truck	Gardening	2	None
1/11/2001	11	2001	32	F	S	HS	14000	Teacher	Protestant	White	Own	Car	Reading	1	None

Preview Controls: There are several controls on the preview form: Print, Print Setup, Margins and Columns, Page Change, and Zoom In and Out.

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