



CampusVue

# Managing Admissions

User Guide



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## Preface

This document contains information that will enable you to use Admissions functions effectively and perform activities involving a students' Admissions process.

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
Italics	Titles, hyperlinks, and special terms
>	Symbol used in paths to signify a shift to the next level of options
<b>Note:</b>	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 (CM) module plays a crucial interactive roll in the activities of the Admissions Department staff. The tools in CM 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:

- Managing leads
- Tracking advertising expenses
- Enrolling students
- Tracking documents
- Generating reports of Admissions activity

## Managing Leads

In this section, you will learn how to process electronic leads and how to reassign leads to different Admissions representatives.

### Electronic Leads

If your school has a CampusVue Web site, an online Inquiry form is available to you. Interested parties can use the Inquiry form to inquire about your school. Although similar to the Quick Lead form, the Inquiry form submitted on the Web does not immediately result in a new student record. Web inquiries are held in a screening file so that an Admissions department staff member can review them and decide whether or not to convert each inquiry to a new student record. When the form is processed, an Electronic Lead record is created in CampusVue's database.

**Note:** The "Electronic Inquiry" record is not the same as the "New Lead" entered manually through CampusVue. The electronic lead records are reviewed (for example, to screen out duplicates) by an Admissions Department representative before a student record is created.

### Processing Electronic Leads

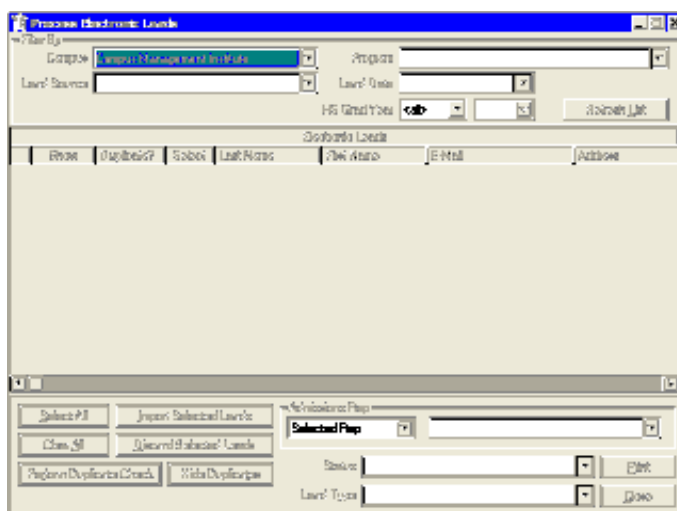
This feature provides for the importing of leads into CampusVue from electronic sources outside of the system. It will display a listing of all students added to the Electronic Leads table.

A staff member in the Admissions Department must regularly review entries in the electronic leads table to ensure a prompt response. In CampusVue, the electronic inquiries are accessed through the **Daily > Admissions > Process Electronic Leads** menu option. The staff person may choose to make a personal contact with the inquirer or may choose to convert the inquiry data to a new lead in CampusVue.

**Note:** It is recommended that you discuss your plan for importing electronic leads with the Campus Management Support Department before you attempt to use this feature.

#### To process an electronic lead:

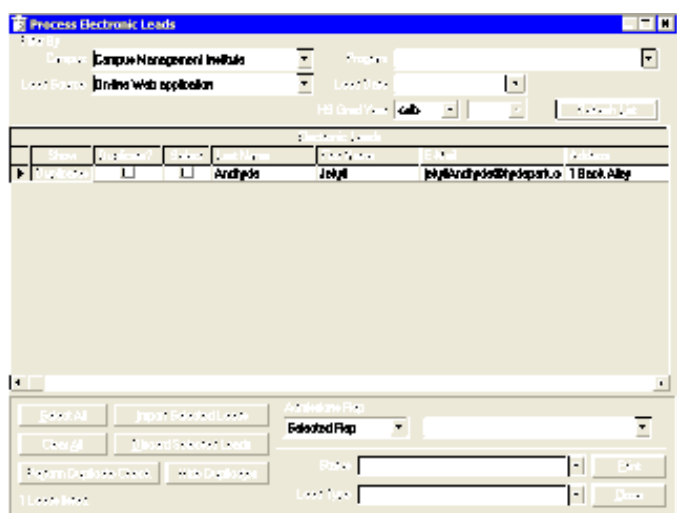
- 1 Select **Daily > Admissions > Process Electronic Leads** to open the Process Electronic Leads form.



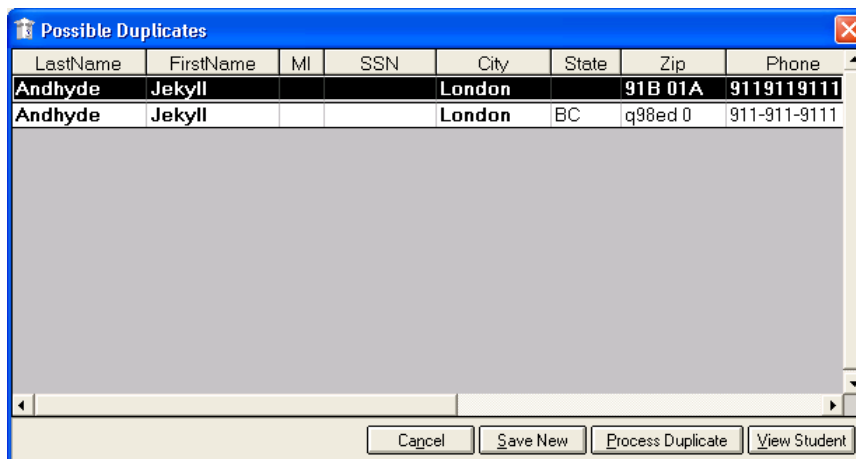
- 2 In the **Filter By** section, select the filtering criteria you wish to use, including the **Campus(es)** and **Program** for which the electronic leads are to be processed; the **Lead Source** from which they were obtained, and the **Lead Date**. Select the **Status** to be assigned to the leads that will be selected for importing into CampusVue.

**Note:** Select **All Campuses** to include leads with no campus designated and all campuses to which you have access. Otherwise, you can select a single campus from your campus list. Click **Select All** or **Clear All** and add/clear campuses individually for speed and ease of use.

- 3 Click **Refresh List**. Lead records that were identified as having possible duplicates on file when the lead information was initially captured will be loaded into the Electronic Leads grid. For each possible duplicate record already on file, the following information - if available - will be listed: first and last name, email address, street address, city, state, zip, phone, lead date, source, campus, program, and comments. If there are leads that can obviously be discarded, for example there is not enough information for a complete lead record, select such leads and click **Discard Selected Leads**. The program will remove them from the table.



- 4 Select the check box in the **Select** column for a particular record and click Perform Duplicate Check. If the new lead record is a duplicate of any of the possible duplicate records listed, a check will appear in the **Duplicate?** cell that corresponds to that record.
- 5 Click the word **Duplicates** in the **Show** column to see a list of all existing records for this New Lead.



If the new lead record is a true duplicate, the user can indicate that the system shall update the existing Student Master record with information from the latest Lead. It will be processed according to school-defined rules. If the user has duplicate override permission, he/she can create a New Lead record even if possible duplicates are on file for the selected record. This action will trigger a pre-configured Contact Manager activity.

- 6 Click **Save New** to update the existing Student Master with data from the New Lead form.
- 7 Click **Process Duplicate** to update an existing record.
- 8 Click **View Student** to see the Student Master record for a selected New Lead.

If the new lead record is not a duplicate, you will have the option to import this lead, if you have override permission to do so.

- 9 Select the leads that you want to import by checking the rows in the **Select** column. Note that you can click the **Select All** or **Clear All** button to assist in the selection process. Records that are de-selected remain in the grid but are neither imported nor discarded.
- 10 Specify the **Lead Source**, (school) **Status**, and **Admissions Rep** who will be assigned to the lead.
- 11 Click **Import Selected Leads**. If the lead is imported, then the new lead will be removed from the grid on the Process Electronic Leads form.



If you decide not to import the lead on this form, then the selected check box will be checked for this new lead on the grid when you return to the Process Electronic Leads form.

- 12 If there are leads that can obviously be discarded, for example those with insufficient or obviously invalid information, select them by placing a checkmark in the Select column and click **Discard Selected Leads**. The program will remove them from the table.
- 13 Click **Hide Duplicates** to have the program remove any rows that it determined to be possible duplicates from the screen. The program will not remove them from the table and they will be available for future sessions of processing electronic leads.
- 14 Click **Print** to print all selected records.

## Batch Quick Lead Entry

You can use the Batch Quick Lead Entry form to add leads to your student master database quickly. You can implement forms for different types of leads. For details refer to *CampusVue* Help.

**To work with the Batch Quick Lead Entry forms:**

- 1 Select **Daily > Admissions > Batch Quick Lead Entry** to open a Quick Lead Setup form:

Quick Lead Setup

Template and Default Field Selection

Select an available Template:

Select Default Fields to use:

Available Fields to Default	
Field Name	Default

Open QL Close

- 2 Use the drop-down list to select one of the templates to use during the lead entry process.

- 3 Check the boxes in the **Default** column to select the default fields. These fields will be moved to the top of the Quick Lead Entry form.

**Quick Lead Setup**

Template and Default Field Selection

Select an available Template:

High School Leads

Select Default Fields to use:

Available Fields to Default	
Field Name	Default
Address	<input type="checkbox"/>
City	<input type="checkbox"/>
State	<input type="checkbox"/>
Telephone	<input type="checkbox"/>
e-Mail	<input type="checkbox"/>
High School	<input checked="" type="checkbox"/>
Interest	<input checked="" type="checkbox"/>

Open QL Close

- 4 Click **Open QL** to begin entering leads. The program opens the Quick Lead form with the selected default fields at the top, as follows.

**Quick Lead**

Default Values Section

High School Interest

Additional Values Section

First Name City

Last Name State

Postal Code Telephone

Address e-Mail

Quick Leads Entered:0 Review On Save/Next Cancel Close

- 5 Fill in the default fields first. These fields will be related to all subsequently entered new leads until you close the form. If necessary, you can change the data in the default fields to continue with a batch of leads without closing the form.
- 6 Fill in the remaining fields on the form for each new lead.
- 7 Click **Save/Next** to save a new lead and open the next new lead record. The non-default fields will be cleared on the new form and the default fields will not be cleared.

The program will increment the **Quick Leads Entered** count each time you save a new lead record. The counter will reset when you close the form and reopen it for a different batch of leads.

As you save leads, you may wish to use the **Review On** button to see the list of leads previously entered during this session. The program will display a pop-up window containing the names of the previously entered leads. To turn the review display on and off as required, click **Review On**.

- 8 Click **Close** to close the Quick Lead Entry form.

## Reassigning Leads

Staff assignments, employee turnover, and department business practices may require that leads be reassigned to a different Admissions representative. CampusVue permits you to reassign leads individually or in batches, to a single recruiter or to a group.

### Single Lead Reassignment

You can reassign an individual student record to a different Admissions Representative by simply editing the Student Master form.


**To reassign a single lead from one Representative to one or more other Representatives:**

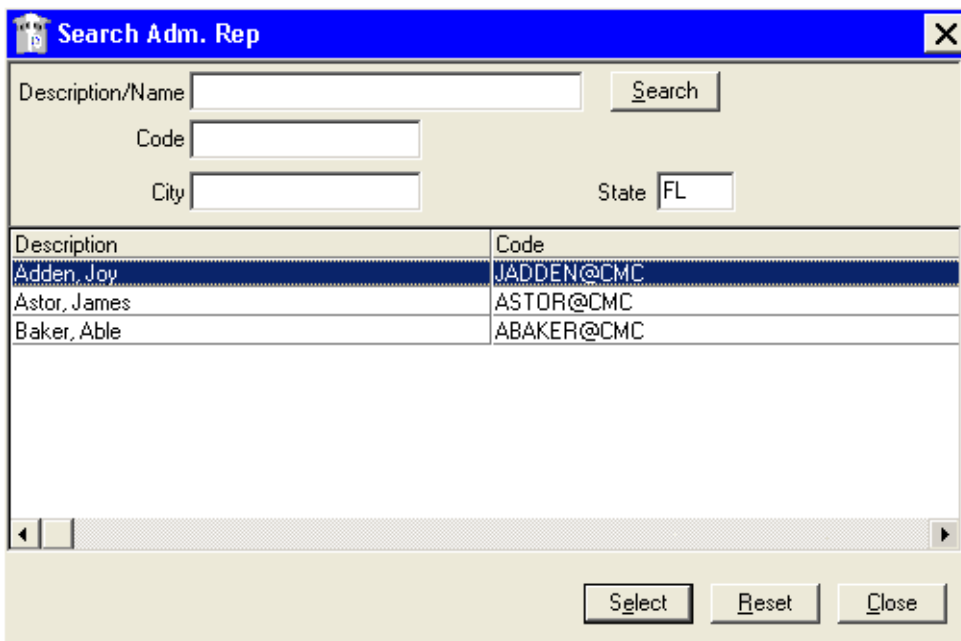
- 1 Perform a search for the student, and double click the student name in the search results box.
- 2 The Student Master form for the selected student will appear in your work area.

**Student Master - Essex, Leigh**

Title		Student Number	422	PIN	
Last Name	Essex	First Name	Leigh	Campus	Campus Management Institute
Middle Name		Suffix		School Status	New Lead
Nickname		Maiden Name		Lead Source	Referral
Address			Lead Date	7/20/2006	10:14 AM
City			Lead Type		
Country	United States of America	<input type="checkbox"/> Bad Address	Last Activity Date		
Phone Number	(404) 555-6790	<input type="checkbox"/> Bad Phone	Adm. Rep	Able Baker	
Work Phone		Ext.	Interest		
Other Phone		County	Program		
E-mail			Shift		
Other email			Expected Start		
SSN	132-54-9876	Gender	Prev Education		
Birth Date		Veteran	Agency/Sponsor		
Marital Status		Disabled	Instrument		
Ethnic Group		Nationality	Orig Start Date		
Citizen		Alien #	Current LDA		
Driv. Lic State		DL #			
			<input type="checkbox"/> Non-Immigrant Student	<input type="checkbox"/> Data Block Indicator	
			DBI Date		

Buttons: Picture, E-Mail, Edit, Close

- Click **Edit** on the **Student Master** form to enter Edit mode. Click the **Search** button  on the right of the **Adm. Rep** field to open the Search Adm. Rep form. Search for the new Admissions Representative using the **Description/Name**, **Code**, **City**, or **State** fields. Highlight a name and click the **Select** button to select the new Admissions Representative from the list. Click **Save**.



The **Search Adm. Rep** dialog box contains search criteria fields and a results table.

Search Criteria:

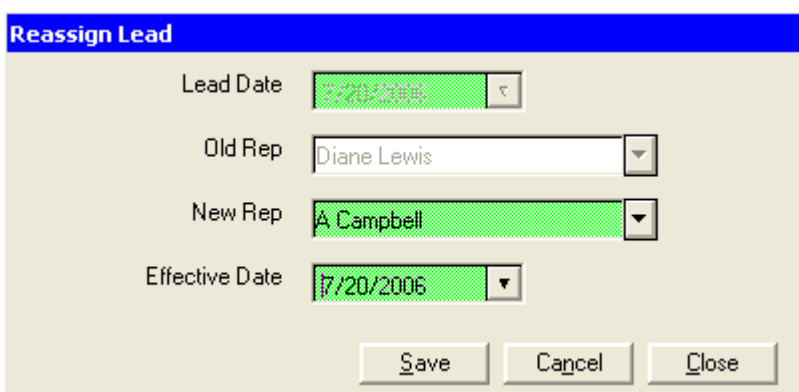
- Description/Name:
- Code:
- City:
- State:

Search Button:

Description	Code
Adden, Joy	JADDEN@CMC
Astor, James	ASTOR@CMC
Baker, Able	ABAKER@CMC

Buttons:

**Note:** *New lead entry* may generate an automatic notification, but no such notification occurs when you reassign a lead. You may wish to notify the new recruiter by other means, such as adding an activity in the Contact Manager and assigning it to the new Admissions representative.




The **Reassign Lead** dialog box contains fields for lead date, old and new representatives, and effective date.

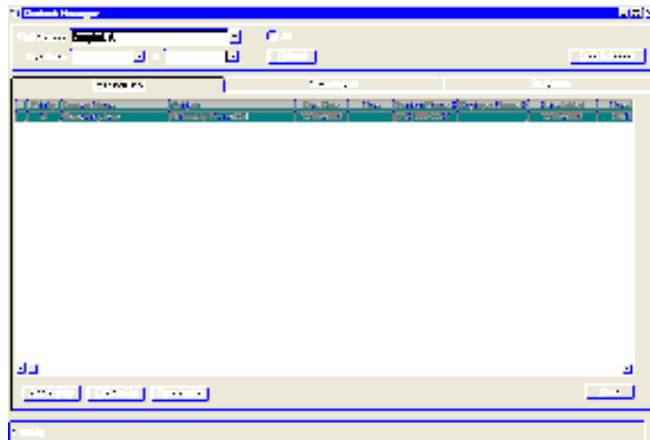
Fields:

- Lead Date:
- Old Rep:
- New Rep:
- Effective Date:

Buttons:

- Acknowledge the confirmation message to complete the process. Edit the **Effective Date** as required. Click **Save**.

- 5 If you would like to send a Contact Manager activity to notify the new Admissions Representative of the lead reassignment, open your Contact Manager by clicking the  icon on the Shortcut bar. The Contact Manager form will appear in your work area.



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

- 7 Select the name of the Admissions Representative from the **Assign To** drop-down list and then search for the student using the **Student** multi selector box. Select the reassigned lead activity from the **Activity** drop-down list, and then click **Save**.


## Batch Lead Reassignment

CampusVue provides a Lead Reassignment wizard to allow you to reassign a group of leads from one Admissions Representative to another.

**To reassign leads from one representative to one or more other representatives:**

- 1 Select **Daily > Admissions > Reassign Leads** to open the **Reassign Leads** wizard in your work area.

- 2 Select the **Current Admissions Rep** from whom the leads are to be reassigned. Select or clear the **Only show active admission reps** box, as required. If this check box is selected, only active recruiters appear in the drop-down list; otherwise, both active and inactive recruiters appear.

**Note:** The ellipsis boxes  permit multiple selections for many of the filters discussed below.

- 3 Select **Student Group** if an entire group is to be reassigned. If **Student Group** is selected, no other selection is required to continue processing. However, other criteria may be selected on an optional basis.
- 4 Enter or select the **Lead Date** range.
- 5 Select a **Lead Type** to be reassigned, or leave blank to reassign all lead types.
- 6 Select a **Lead Source** to be reassigned, or leave blank to reassign all lead sources.
- 7 Select **Program** to reassign all leads in a program, or leave blank to reassign all programs.
- 8 Select a **Program Interest** to be reassigned, or leave blank to reassign all program interests.
- 9 Enter or select the **Last Activity Date** range.

- 10 Select **State** or leave blank to reassign leads from all states.
- 11 Click **Next** to open the second page of the **Reassign Leads** wizard.



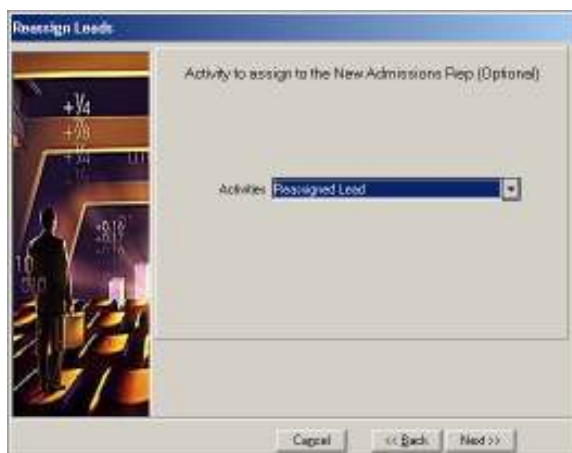
- 12 Select the **Student Statuses** to be included in the reassignment. Click the plus signs to expand the list of statuses. Click the boxes beside the status descriptions to select them. A check mark in a box means that it is selected. If you check a high-level status, the lower-level statuses below it in the tree will also be selected.
- 13 Click **Next** to open the third page of the **Reassign Leads** wizard.



- 14 Select the **Admissions Rep(s)** to whom the leads will be assigned. Click the box next to a rep's name to select or clear it. A check mark in the box next to a rep's name means that the representative will share in the reassignment of leads. Click **Select All** or **Clear All** if necessary to help in the selection process.
- 15 Enter the **maximum number of selected leads** to be reassigned to the selected Admissions Rep(s); otherwise the reassignment will be an equal distribution.

**Note:** For selected Representatives on this form, the program defaults the Max to 999,999 leads. If you do not change this default, the first Representative listed will get all of the transferred leads.

- 16 Click **Next** to open the fourth page of the **Reassign Leads** wizard.



- 17 Select a Contact Manager Activity to assign to the new Admissions Rep. This activity will notify the new representative of each newly-reassigned lead.
- 18 Click **Next** to open the fifth page of the **Reassign Leads** wizard.



**Note:** The program will display a description of the reassignment process it is about to perform. Read this statement carefully to be sure it is what you want to accomplish. If the statement correctly describes your intentions, click **Finish** to continue the reassignment. If the statement does not correctly describe your intentions, click **Back** to go back and make any necessary corrections. If required, you can click **Cancel** here and start over.

- 19 When you click **Finish**, the program will change the lead records to reflect the reassignment of leads to the selected Admissions Rep(s).
- 20 The program will display a message when the process is complete





- 21 Click **OK** to acknowledge the message. After you click **OK**, you can scroll up and down the **Reassignment Results** list to review the list of reassigned leads.



- 22 Click **Print** to review and/or print the reassigned leads. The **Reassigned Leads** report appears.

Report: rpt\_Lead\_Reassign\_Leads.rpt  
AD IN METRO/TON

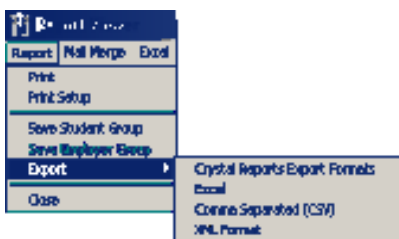
Source: rpt\_CampusVue\_Reassign\_Leads.rpt, rpt\_Lead\_Reassign\_Leads.rpt, rpt\_Lead\_Reassign\_Leads.rpt, rpt\_Lead\_Reassign\_Leads.rpt

Student Name	Previous Administrator	Lead Type	Lead Status	Current Administrator	Notes	Details
LEWIS, DIANE	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON
SMALLWOOD, CLIFF	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON
TONY, AUSTIN	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON	AD IN METRO/TON

Leads Reassigned to Lead Type: 3

Total Leads Reassigned: 3

- 23 Users can export the same data by clicking **Report > Export** on the Report Viewer form. Users can select from the following four export formats: **Crystal Reports Export Formats**, **Excel**, **Comma Separated (.CSV)**, and **XML Format**.



- 24 Click **Close** to exit the process.

## Improved Lead Source Tracking

In this section, you will learn,

- How to define a list of lead vendors and associate multiple sub-vendors to each lead vendor.
- How to associate multiple lead vendors and/or sub-vendors to a lead source.
- How to associate lead vendors and sub-vendors to lead sources when creating a new lead.
- How to associate lead vendors and sub-vendors to lead sources while editing the Student Master details.

## Define Lead Vendors and Associate Multiple Sub-vendors

A lead vendor is the vendor who provided a lead or prospect.

**To define the list of vendor(s) and associate multiple sub-vendors to each lead vendor:**

1. Click **Lists > Admissions** to open the Setup - Admission Lists form.

Description	Code	Active
Cable News Network	CNN	Y
Florida Atlantic U.	FRI	Y
Friend	HS	Y
High School	LYNN	Y
Lynn University	MH	Y
Miami Herald	WEB	Y
Online Web application	OC	Y
Other College	QUINT	Y
Other Street	REF	Y
Referral	REFRND	Y
Referral From Friend	SS	Y
Sun Sentinel	FLYER	Y
The Flyer	28	Y
TV28	UK	Y
Unknown	WTVR	Y
WTVT Radio	WTVU7	Y
WTVT Television?		Y

2. Click the **Lead Vendors** tab to open a list of existing lead vendors.

Description	Code	Active	Lead Source(s)
Vendor 1	VENDOR1	Y	QUNST
Vendor 2	VENDOR2	Y	QUNST
Vendor 3	VENDOR3	Y	QUNST
Vendor 4	VENDOR4	Y	QUNST

- Click **Add** to open Lead Vendors Code Setup form or select a previously added lead vendor and click **Edit** to work with it.

Code	Description	Active	Phone	Lead Source(s)
------	-------------	--------	-------	----------------

- Type the required information in the **Code**, **Description**, **Address**, **Phone**, **Fax**, **Email**, **City**, **County**, **URL**, **Country**, and **Comments** fields.

5. Be sure when entering new vendor information to check the **Active** box. If the vendor is no longer active, clear the **Active** box.

The screenshot shows the 'Lead Vendors Code Setup' window. The 'Active' checkbox is checked and highlighted with a red box. The 'Code' field contains 'LEAD VENDOR 5' and the 'Description' field contains 'Lead Vendor 5'. Other fields like Address, City, County, Lead Source(s), Phone, Fax, Email, URL, and Comments are empty. The 'Sub Vendor(s) to Lead Vendor' section is empty. At the bottom, there are 'Add', 'Edit', 'Delete', and 'Enable' buttons.

6. Click **Save**.

**Note:** The **Add**, **Edit**, and **Delete** buttons are not enabled on the **Sub Vendor(s) to Lead Vendors** section. After you save the lead vendor details, these buttons will be enabled.

The screenshot shows the 'Lead Vendors Code Setup' window after saving. The 'Save' button is highlighted with a red box. The 'Active' checkbox is still checked. The 'Code' field contains 'LEAD VENDOR 5' and the 'Description' field contains 'Lead Vendor 5'. Other fields are empty. The 'Sub Vendor(s) to Lead Vendor' section is empty. At the bottom, there are 'Add', 'Edit', 'Delete', and 'Enable' buttons.

7. Click **Add** on the Lead Vendors Code Setup form to enter the sub vendor details or select a previously added sub vendor and click **Edit** to work with it.

The screenshot shows the 'Lead Vendors Code Setup' window. It has two main sections. The top section is for 'LEAD VENDOR 5' and the bottom section is for 'SUB VENDOR 1'. Both sections have an 'Active' checkbox checked. The top section has fields for Code, Description, Address, City, County, Country, Lead Source(s), Phone, Fax, Email, URL, and Comments. The bottom section has the same fields, plus a 'Same Address as Lead Vendor' button. The 'Save', 'Cancel', and 'Close' buttons are at the bottom right of each section.

8. Type the required information in the **Code**, **Description**, **Address**, **Phone**, **Fax**, **Email**, **City**, **County**, **URL**, **Country**, and **Comments** fields. If the sub vendor address is the same as the lead vendor's address, you can click the **Same Address as Lead Vendor** button and the system will copy the lead vendor's address to the sub vendor's address detail.

This screenshot is identical to the one above, but the 'Same Address as Lead Vendor' button in the 'SUB VENDOR 1' section is highlighted with a red rectangle.

9. When entering new sub vendor information, select the **Active** box. If the sub vendor is no longer active, clear the **Active** box.
10. Click **Save** to save the sub vendor details.

The screenshot shows the 'Lead Vendors Code Setup' dialog box. It has two main sections. The top section is for 'LEAD VENDOR 5' with fields for Code, Description, Address, City, County, Lead Source(s), Phone, Fax, Email, URL, and Comments. The bottom section is for 'SUB VENDOR 1' with similar fields. In the 'SUB VENDOR 1' section, the 'Active' checkbox is checked. The 'Save' button at the bottom right of the 'SUB VENDOR 1' section is highlighted with a red box.

11. After saving the sub vendor details, the frame disappears and the grid lists the recently saved sub vendor.

The screenshot shows the 'Lead Vendors Code Setup' dialog box after saving. The 'SUB VENDOR 1' section is now a table with one row. The 'Save' button is no longer visible. The table has the following data:

Code	Description	Active	Phone	Lead Source(s)
SUB VENDOR 1	Sub Vendor 1	Y		

At the bottom of the dialog, there is a checkbox labeled 'Only show active Sub Vendor(s)' which is checked, and buttons for 'Add', 'Edit', 'Delete', and 'Disable'.

12. Click **Lists > Admissions > Lead Vendors**. Select the **Print** button to view the association between Lead Vendor and the Sub vendor.

## Lead Vendor Listing

1st\_AmLeadVendor.rpt  
ADMINISTRATOR

Sorted by: Description

5/8/2008  
3:22:57 PM

Code	Description Lead Source(s)	Address	Phone Fax	Email URL	Active
Comments					
Lead Vendor LEAD VENDOR 5	Lead Vendor 5	123 Street 21  Gokta, CA, 93160 Palm Beach, United States of America	(111) 222-3333  (111) 222-2323	abcd@leadvendor5.com  www.leadvendor5.com	Yes
Sub Vendor SUB VENDOR 1	Sub Vendor 1	123 Street 21  Gokta, CA, 93160 Palm Beach, United States of America	(111) 222-3333  (111) 222-2323	abcd@subvendor1.com  www.subvendor1.com	Yes

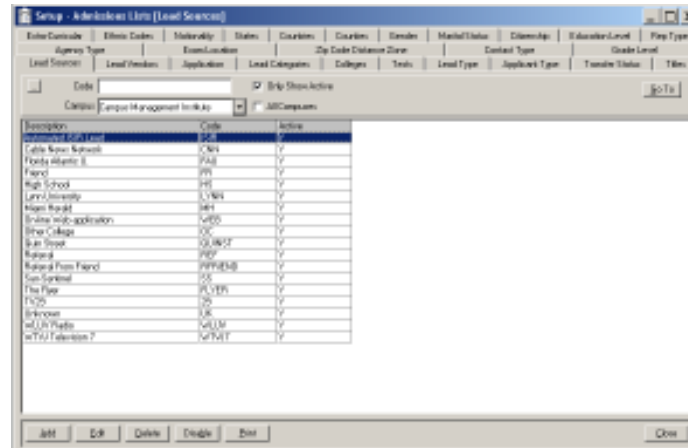
## Associate Lead Vendors and Sub Vendors to a Lead Source

The lead sources are used to designate how a lead (prospect) came to hear about your institution. One or more lead source codes can be recorded in a lead's record and later summarized with others to measure the effectiveness of your advertising program.

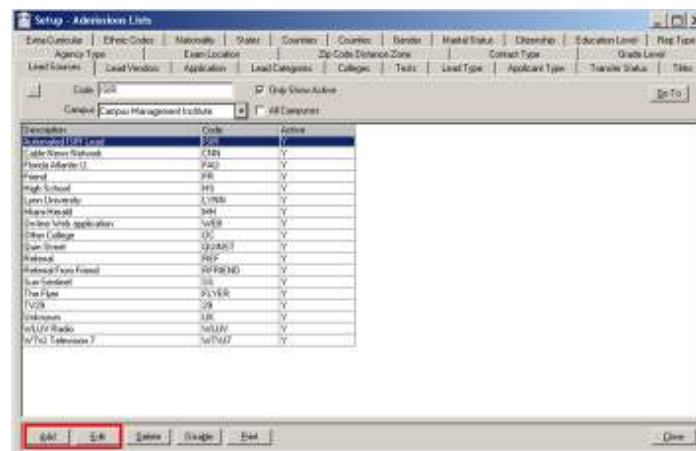
To associate multiple lead vendors and/or sub vendors to a lead source:

1. Click **Lists > Admissions** to open the Setup - Admissions Lists form.

2. Click the **Lead Sources** tab to open a list of existing lead sources. You can select Campus at the top of the form to see only the lead sources for that campus.



3. Click **Add** to add a new Lead Source code or select a lead source on the list and click **Edit** to view or modify the details.

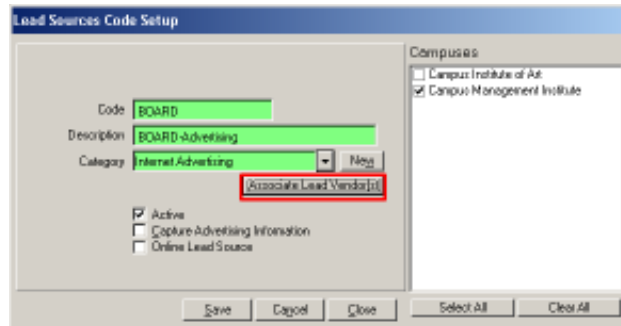


4. The Lead Sources Code Setup form displays.

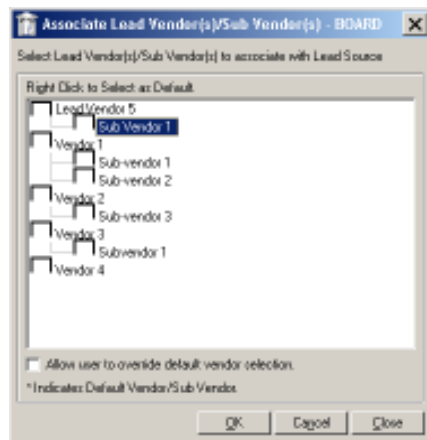
5. Enter the required information in the **Code** and **Description** fields.
6. Select a Category to which the lead source belongs. Click the **New** button to add a new lead category record.



7. Select the **Associate Lead Vendor(s)** button to associate lead vendors and sub vendors to the lead source.

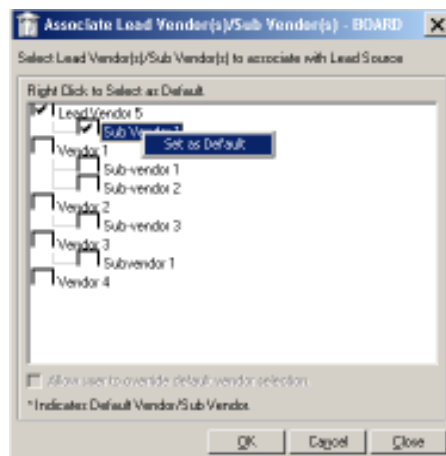


8. The Associate Lead Vendor(s)/Sub Vendor(s) to Lead Source form displays. You can check the lead vendor/sub vendor node to associate it with the Lead Source.



9. To set a lead vendor or sub vendor as the default vendor, you can right-click Lead Vendor or Sub Vendor and select the **Set as Default** option.

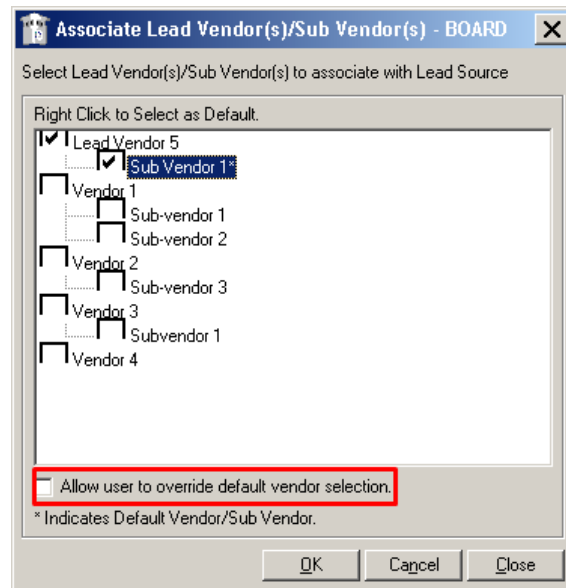
**Note:** There can be only one default Vendor or Sub vendor for a Lead Source.



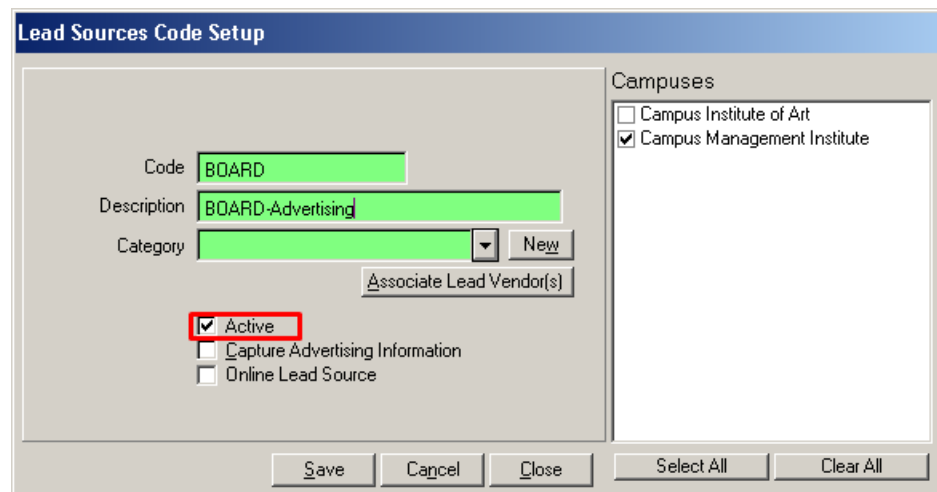
10. A new check box with the caption **Allow user to override default selection** will be added. If this check box is selected, you will be able to see Vendor/ Sub

vendor associated with the Lead Source on the Student Master form, the Quick Lead form, and the Advertisement Expense form.

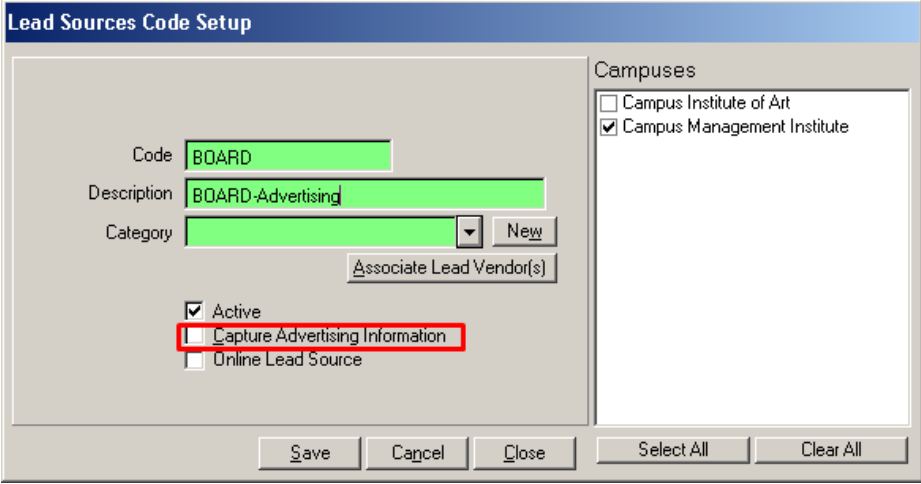
**Note:** This check box will only be enabled when there is a Lead Vendor/Sub vendor marked as default.



11. Check or clear the **Active** check box as required.



12. Select the **Capture Advertising Information** box to include the lead source in the Lead Source Performance report.



**Lead Sources Code Setup**

Code:

Description:

Category:

☒ Active

☒ Capture Advertising Information

☐ Online Lead Source

**Campuses**

☐ Campus Institute of Art

☒ Campus Management Institute

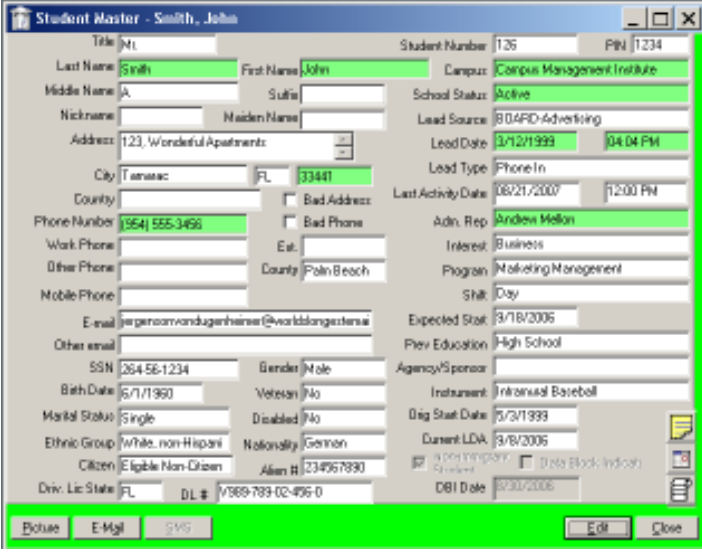
13. Select at least one campus from the Campuses list. Click **Select All** or **Clear All** as required.

14. Click **Save**. Click **Close** to exit the Lead Source Code Setup form.

**To associate lead vendors and sub vendors with a lead source when editing the Student Master details:**

If the Student Master form is long:

1. Click **View > Admissions > Student** to open the Student Master form.



**Student Master - Smith, John**

Title:  Student Number: 1236 PIN: 1234

Last Name:  First Name:  Campus:

Middle Name:  Suffix:  School Status:

Nickname:  Maiden Name:  Lead Source:

Address:  Lead Date:

City:  FL  Lead Type:

Country:  ☐ Bad Address Last Activity Date:

Phone Number:  ☐ Bad Phone Adm. Rep:

Work Phone:  Int. Rep:

Other Phone:  County:  Program:

Mobile Phone:  Shift:

E-mail:  Expected Start:

Other email:  Prev Education:

SSN:  Gender:  Agency/Sponsor:

Birth Date:  Veteran:  Instrument:

Marital Status:  Disabled:  Orig Start Date:

Ethnic Group:  Nationality:  Current LDA:

Citizen:  Alien #  ☐ Data Block Ind. on Screen ☐ Data Block Ind. on

Dir. Lic State:  DL #:  DBI Date:

2. Click the **Edit** button to modify student information.

**Student Master - Smith, John**

Title: Mr. Student Number: 1234 PIN: 1234

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

Middle Name: A Suffix: School Status: Active

Nickname: Maiden Name: Lead Source: BOARD-Advertising

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

City: Tamarac FL 33441 Lead Type: Phone In

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

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

Work Phone: Est.: Interest: Business

Other Phone: County: Palm Beach Program: Marketing Management

Mobile Phone: Shift: Day

E-mail: jsmith@worldlongest.com Expected Start: 9/18/2006

Other e-mail: Prev Education: High School

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

Bath Date: 5/1/1990 Veteran: No Instrument: Intramural Baseball

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

Ethnic Group: White, non-Hispanic Nationality: German Current LDA: 3/8/2006

Citizen: Eligible Non-Citizen Alien #: 234567890

Driv. Lic State: FL DL #: V989-789-02-456-0 DBI Date: 8/30/2006

Buttons: Back, E-Mail, SMS, **Edit**, Close

- The Edit Student Information form displays. Click the **Lead Vendor(s)** button to associate lead vendors and sub vendors to the lead source.

**Note:** The **Lead Vendor(s)** button will only be enabled when you select a lead source that has Lead Vendor(s)/Sub Vendor(s) associated with it.

**Edit Student Information - Smith, John**

Ethnic Group: White, non-Hispanic

Nationality: GERMAN German

Citizen: Eligible Non-Citizen ☒ Non-Immigrant Student

Alien #: 234567890

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

Disabled: No Veteran: No

Campus: Campus Management Institute

School Status: Active

Lead Source: BOARD BOARD-Advertising **Lead Vendor(s)**

Lead Date: 3/12/1999 04:04 PM

Lead Type: Phone In

Adm. Rep: MEL@CMC Andrew Mellon

Interest: Business

Program: MAR Marketing Management

Shift: Day

Expected Start: 9/18/2006

Prev Education: High School

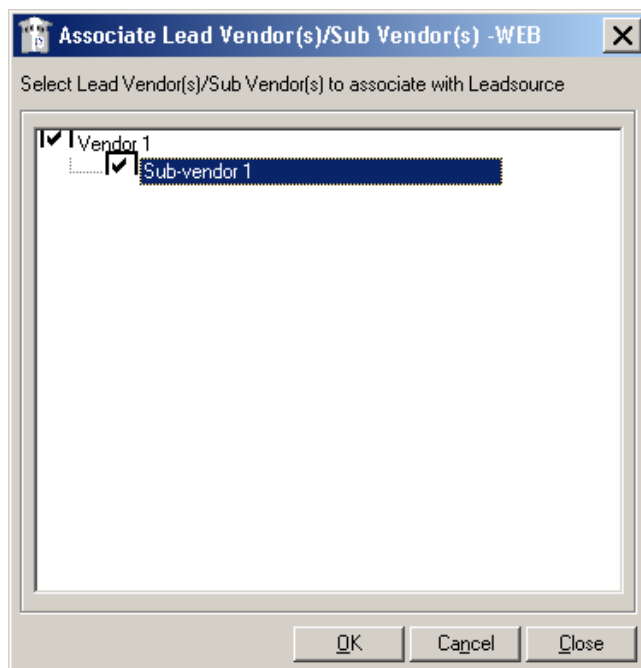
Agency/Sponsor:

Instrument: IBASE Intramural Baseball

Buttons: Save, Cancel, Close

- The Associate Lead Vendor(s)/Sub Vendor(s) to Lead Source form displays. You can check the lead vendor/sub vendor node to associate it with Lead Source to the selected student.

**Note:** If you select a sub vendor node, the associated lead vendor node is automatically selected. Similarly, if you clear a lead vendor that has a sub vendor node selected all the selected sub vendors will be cleared automatically.




5. Click **OK** to return to Edit Student Information form.
6. Click **Save** and Click **Close** to exit the form.

If the Student Master form is short:

1. Click **View > Admissions > Student** to open the Student Master form.

- Click the **Edit** button to modify student information.

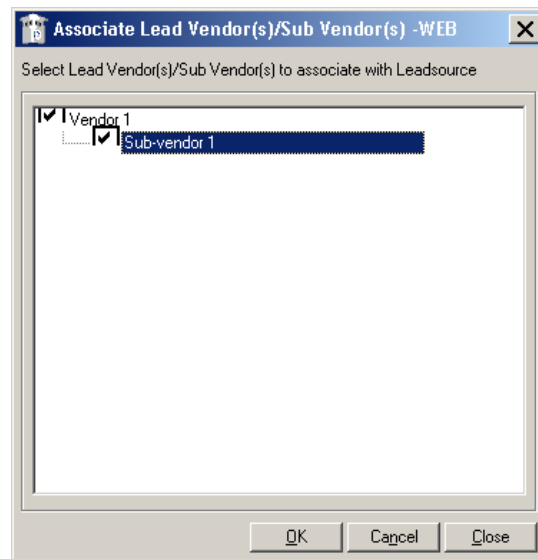
The screenshot shows the 'Student Master - Smith, John' form. It contains various fields for student information, including Title, Last Name, First Name, Middle Name, Nickname, Address, City, Country, Phone Number, Work Phone, Other Phone, Mobile Phone, Email, SSN, Birth Date, Gender, Marital Status, Ethnic Group, Citizenship, Div. Lic State, Student Number, PIN, Campus, School Status, Lead Source, Lead Date, Lead Type, Last Activity Date, Adm. Rep, Interest, Program, Shift, Expected Start, Prev Education, Agency/Sponsor, Instrument, Orig Start Date, Current LDA, Non-immigrant Student, and DBI Date. The 'Edit' button at the bottom is highlighted with a red box.

- You can now edit the student information. Click the  button next to the **Lead Source** field to associate lead vendors and sub vendors to the lead source.

The screenshot shows the 'Student Master - Smith, John' form. The button next to the 'Lead Source' field is highlighted with a red box. This button is used to associate lead vendors and sub vendors to the lead source.

- The Associate Lead Vendor(s)/Sub Vendor(s) to Lead Source form displays. You can check a lead vendor/sub vendor node to associate it with the Lead Source to the selected student.

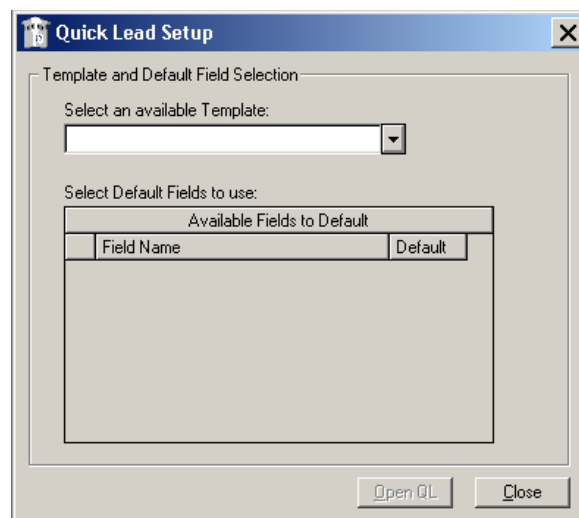
**Note:** If you select a sub vendor node, the associated lead vendor node is automatically selected. Similarly, if you clear a lead vendor that has a sub vendor node selected all the selected sub vendors will be cleared automatically.



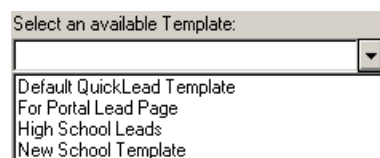
5. Click **OK** to return to Student Master form.
6. Click **Save** and Click **Close** to exit the form.

**To associate Lead Vendors and sub vendors to a lead source when creating a new lead:**

1. Click **Daily > Admissions > Batch Quick Lead Entry** to open the Quick Lead Setup form.



2. Select a template from the **Select an available Template** drop-down field.



- Click the **Lead Source** option from the **Select Default Fields to use** section on the Quick Lead Setup form.

**Quick Lead Setup**

Template and Default Field Selection:

Select an available Template:  
 Default QuickLead Template

Select Default Fields to use:

Available Fields to Default		Default
Field Name		
First Name		<input type="checkbox"/>
Last Name		<input type="checkbox"/>
Telephone		<input type="checkbox"/>
Lead Source		<input checked="" type="checkbox"/>
e-Mail		<input type="checkbox"/>
Address		<input type="checkbox"/>
Postal Code		<input type="checkbox"/>
City		<input type="checkbox"/>

Open QL Close

- Click the **Open QL** button to open the Quick Lead form.

**Quick Lead**

Default Values Section

Lead Source: [Dropdown] Lead Vendor(s)

Additional Values Section

First Name: [Text Field]  
 Last Name: [Text Field]  
 Telephone: [Text Field]  
 e-Mail: [Text Field]  
 Address: [Text Field]  
 Postal Code: [Text Field]

City: [Text Field]  
 State: [Text Field]  
 Country: [United States of America]  
 Interest: [Text Field]  
 Admin. Rep: [Text Field]

Quick Leads Entered: 0 Review On Save/Next Cancel Close

- Select the **Lead Source** from the drop-down list. Click the **Lead Vendor(s)** button to associate lead vendors and sub vendors to the lead source.

**Quick Lead**

Default Values Section

Lead Source: [Online Web application] Lead Vendor(s)

Additional Values Section

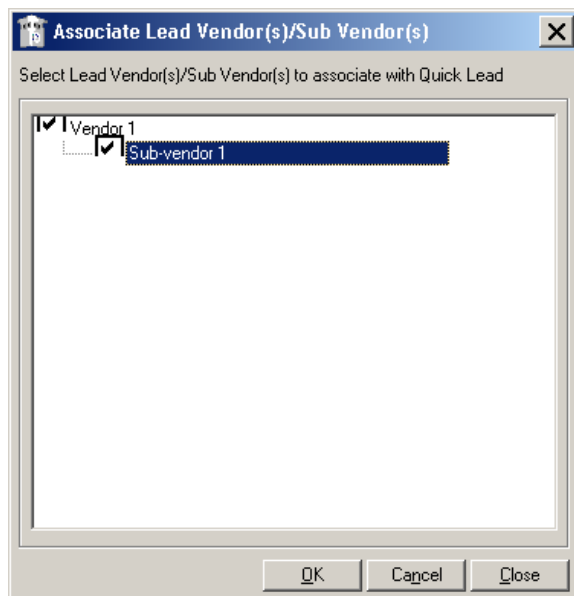
First Name: [Text Field]  
 Last Name: [Text Field]  
 Telephone: [Text Field]  
 e-Mail: [Text Field]  
 Address: [Text Field]  
 Postal Code: [Text Field]

City: [Text Field]  
 State: [Text Field]  
 Country: [United States of America]  
 Interest: [Text Field]  
 Admin. Rep: [Text Field]

Quick Leads Entered: 0 Review On Save/Next Cancel Close



- The Associate Lead Vendor(s)/Sub Vendor(s) to Lead Source form displays. You can select a lead vendor/sub vendor node to associate it with the lead source.



- Click **OK** to return to the Quick Lead form.
- Enter the required information in the **First Name**, **Last Name**, **Telephone**, **e-Mail**, **Address**, **Postal Code**, **City**, **State**, **Country**, **Interest**, and **Adm.Rep** fields.

A screenshot of a "Quick Lead" form. The form has a title bar with a close button (X). Below the title bar, there is a "Default Values Section" with a "Lead Source" dropdown menu set to "On-line Web applica..." and a "Lead Vendor(s)" dropdown menu. Below this is an "Additional Values Section" containing several input fields: "First Name", "Last Name", "Telephone", "e-Mail", "Address", "Postal Code", "City", "State", "Country" (set to "United States of America"), "Interest", and "Adm. Rep". At the bottom left, there is a "Quick Leads Entered:0" label. At the bottom right, there are four buttons: "Review On", "Save/Next", "Cancel", and "Close".

- Click the **Save/Next** button and click **Close** to exit the form.

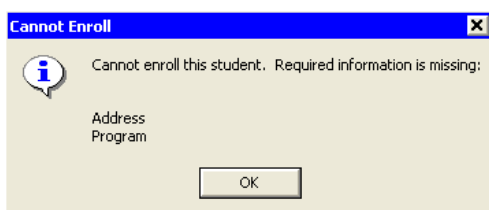
## Enrolling Students

Your institution's business practices will dictate when a student is a candidate to be "enrolled." The Enrollment process associates a student with a particular program version and start date, determines the student's new post-enrollment school status, and moves the student from a "Lead" or "Applicant" status category to "Enrolled." After a student is enrolled, the student's records are automatically populated with enrollment-specific information. They are also made available for further processing, such as financial aid packaging and class registration.

### To enroll a student:

- 1 Open the Student Master form for the student to be enrolled and ensure that your school's required information for enrollment is present.

- 2 Select **Daily > Admissions > Enroll Student** to open the Enrollment Wizard. If the Student Master form is missing any information that your institution requires be present for the student to be enrolled, the wizard will open with this error message:



- 3 Click **OK** to close the message and the wizard. Edit the Student Master form to provide the missing information and click **Save**; then reopen the Enrollment wizard.
- 4 The Enrollment wizard opens to Step 1 with the current student's name in the **Student** field (but it can be changed if this is not the student you wish to enroll).

Enroll Student: Search, Launch - 422

Step 1 of 2: Select Student

Student:  Search

Campus:

Admission Reg:

Cancel << Back Next >>

- Click **Next** to go to Step 2. Select the **School Status** to be assigned to the newly-enrolled student. Select the **Program, Program Version, Version Start Date, Shift, and Grade Level**. Note that your selections at the Program and Program Version levels will control your options in subsequent fields, down to the Version Start Date.

Enroll Student: Search, Launch - 422

Step 2 of 2: Select Program

Program Type:  Non-Degree

Status:  Full Part

Program:  Financial Management

Program Version:  Available in Financial Management

Version Start Date:  2008 Fall

Shift:  Day

Grade Level:  1st year, never attended college

Print Available

Y-axis scale to be used in subsequent year order:

Cancel << Back Next >>

**Note:** Required fields in the Enrollment wizard are controlled at **Setup > Academic Records > Enrollment**, and may differ from this example.

- Click **Select Area(s) Of Study** if your school has defined majors, minors, or concentrations for the program and program version selected.

Area(s) of Study

Available Area(s) Of Study:

Select Area Of Study:

Area Of Study:  Major

Area Of Study:

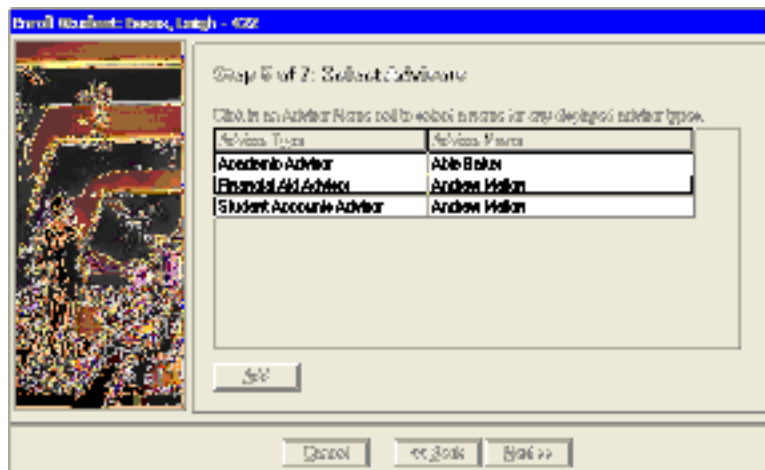
OK Cancel

The Area(s) of Study form enables you to select the areas of specialization for the course of study and display them in a tree structure. If the area of study is of the type **Major** and has “Concentrations” attached, the system adds the Concentrations to the tree automatically. You can use the arrow buttons to associate a **Major**, **Minor**, and **Concentration** to the student’s degree. The list of available Areas of Study is filtered based on the **Program Version** selected in this step of the wizard. The Area(s) of Study field displays a summary of the Areas selected for this enrollment. Click **Next**.

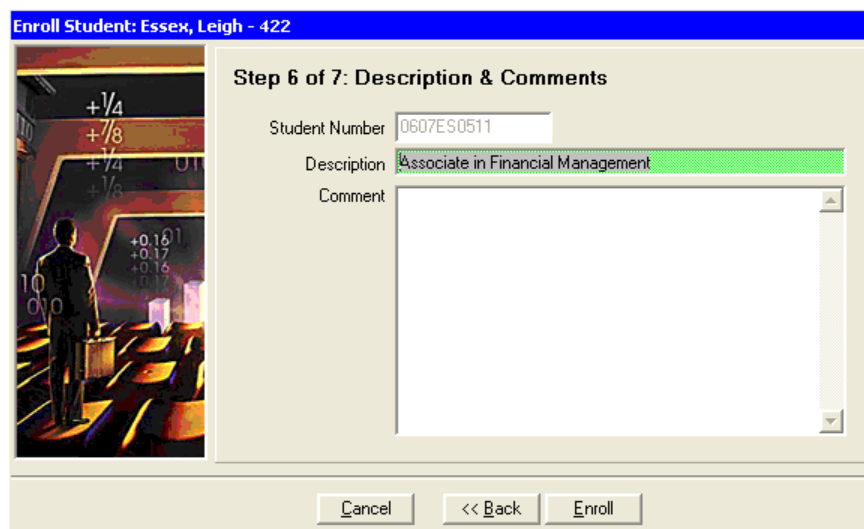
- 7 In Step 3, select the **Start Term** for the enrollment. The **Billing Method** may default, but can be edited as required. Click **Next**.

- 8 In Step 4, the **Application** and **Enroll** dates default to the system date (unless existing Applicant data supplied a different Application date), and the **Expected Start** date to the start date previously selected. The system calculates **Mid-Point** and **Graduation** dates based on the start date, the defined length of the selected program version, and what the system knows about your academic calendar. Review these dates carefully, enter the **Extern Start Date** if required, and click **Next**.

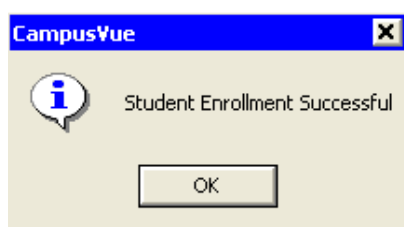
- 9 Step 5 may be an optional step in the wizard. If your school has included it, select the student’s “Advisors” from the **Advisor Name** scroll list. To add a new **Advisor Type**, click **Add** and select the **Advisor Type** from the scroll list. You can then tab to the **Advisor Name** and select the corresponding Advisor name. Click **Next**.



- 10 Step 6 is the final required step, although it may be followed by additional optional steps. The **Student Number** is a unique number assigned to this enrollment event. Enter comments as required and click **Enroll** to complete the enrollment process.



- 11 Click **OK** to close the confirmation message and open any additional optional steps.



- 12 If the Documents folder opens, perform any necessary document tracking related to the new enrollment. Click **Save** to save your changes and **Close** to close the folder and return to any remaining wizard steps.

Document	Status	Date	Received	Action	Received Date
AM Application for Enrollment	AM	Required - Required	7/21/2008		7/21/2
Driver's License	AM	Required			7/21/2
Birth Certificate	AM	Required			
AM Admissions Packet	AM	Required			
Student Picture	AM	Required			
School Security card	CM	Required			
CS Resume	PL	Required			
Foreign Student's Letter	AD	Required			

- 13** Step 7 is the final wizard step. The buttons give you access to perform enrollment-related tasks in other parts of the student record. Select one or more buttons as required, perform the necessary tasks in the folder that opens, and close the folder to return to the wizard.

Document Tracking	opens the student's Documents folder
Registration	opens the student's Schedule folder
Enrollment Fees	opens the student's Fees folder
Ledger Card	opens the student's Ledger Card folder

- 14** Click **Finish** to close the wizard. The Student Master form will now reflect the student's new border color, school status, and expected start date.

## Admissions Maintenance Tasks

In this section you will learn how to maintain the list of high schools, track advertising expenses, and track student documents.

### Setting up High Schools

The High Schools list contains names of high schools from which your students are drawn. Your institution may have special relationships with people at these schools. Reports can be produced that indicate the number of students from each high school.

You can add an unlimited number of contacts to any high school record. You can also print mailing labels for contacts at a selected high school or at multiple schools.

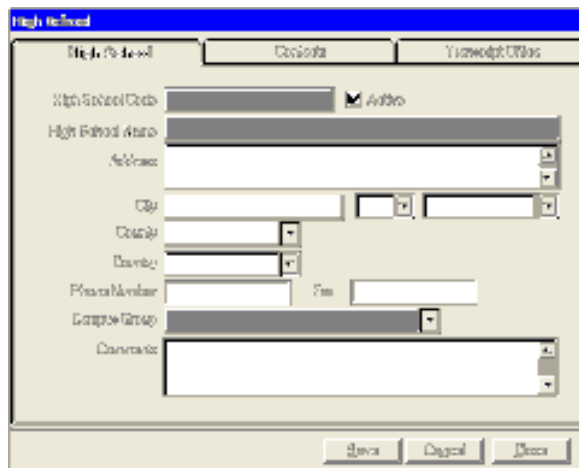
**To add or edit a high school, complete the following steps:**

- 1 Click **Daily > Admissions > High Schools** to open the High Schools form.

The screenshot shows the 'High Schools' form. The title bar is blue with the text 'High Schools' and a close button. The form has a light beige background. It contains the following fields and controls:

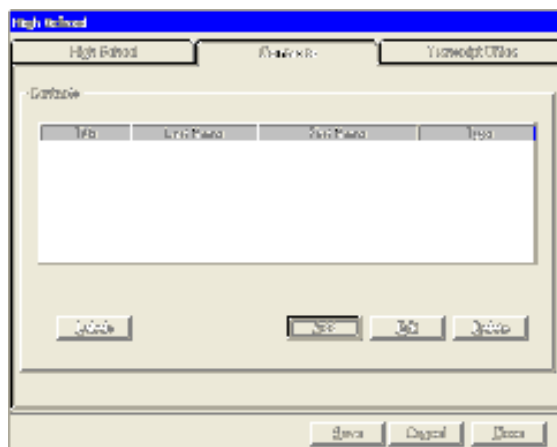
- Name:** A text input field with a 'Search' button to its right and a 'Clear' button further right.
- Code:** A text input field.
- City:** A text input field.
- State:** A text input field.
- County:** A dropdown menu.
- Country:** A dropdown menu.
- Telephone:** A text input field.
- Campus:** A dropdown menu currently showing 'Campus Management Institute'.
- Filters:** Two checkboxes: 'All Campuses' (unchecked) and 'Only Show Active' (checked).
- Table:** A table with four columns: 'Name', 'Code', 'City', and 'State'. The table is currently empty.
- Buttons:** At the bottom of the form are five buttons: 'Add', 'Edit', 'Delete', 'Print', and 'Close'.

- 2 To search for a high school that is already in the CampusVue database, enter search criteria and click **Search**. The program will display a list of all high schools matching your search criteria. Select the one you want and click **Edit**.
- 3 Click **Add** to open a form in which you can add a new high school.



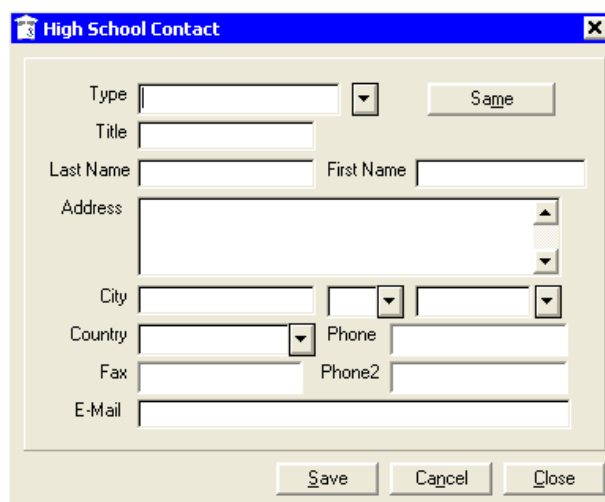
The screenshot shows the 'High School' form in the CampusVue system. The form has a title bar 'High School' and three tabs: 'High School', 'Contacts', and 'Yarnwight Office'. The 'High School' tab is active. The form contains the following fields: 'High School Code' (text box), 'High School Name' (text box), 'Address' (text box), 'City' (text box), 'State' (dropdown menu), 'Zip' (text box), 'Country' (dropdown menu), 'Phone Number' (text box), 'Fax' (text box), 'Campus Group' (dropdown menu), and 'Comments' (text box). At the bottom are 'Save', 'Cancel', and 'Close' buttons.

- 4 Enter the High School Code, High School Name, Address, City, State, Zip, Country, Phone Number, Fax, Campus Group, and Comments.
- 5 Click the **Contacts** tab to add a new Contact.



The screenshot shows the 'High School' form with the 'Contacts' tab selected. The form has a title bar 'High School' and three tabs: 'High School', 'Contacts', and 'Yarnwight Office'. The 'Contacts' tab is active. The form contains a table with columns: 'Info', 'Last Name', 'First Name', and 'Phone'. Below the table are 'Add', 'Edit', 'Delete', and 'Print' buttons. At the bottom are 'Save', 'Cancel', and 'Close' buttons.

- 6 Click **Add** to open the **High School Contact** form.



The screenshot shows the 'High School Contact' form. The form has a title bar 'High School Contact' and a close button. The form contains the following fields: 'Type' (dropdown menu), 'Title' (text box), 'Last Name' (text box), 'First Name' (text box), 'Address' (text box), 'City' (text box), 'State' (dropdown menu), 'Country' (dropdown menu), 'Phone' (text box), 'Fax' (text box), 'Phone2' (text box), and 'E-Mail' (text box). At the bottom are 'Save', 'Cancel', and 'Close' buttons.



- 7 Select an existing **Contact Type** from the list or enter a new contact type. When you add a new contact type, the description will be added to the High School Contact Type table.
- 8 Enter the name and address information for the contact. If the address information for the contact is the same as for the school, click **Same**. The program will copy the school address information to the contact form.
- 9 Click **Save** to save the contact information and add it to the **Contact** tab grid.
- 10 Click **Close** to close the High School Contact form.
- 11 Click **Labels** to print mailing labels for the current high school's contacts. The High School Contacts report can be used to print contact labels for multiple high schools.
- 12 Click the Transcript Office tab.

The screenshot shows a software window titled "High School" with three tabs: "High School", "Contacts", and "Transcript Office". The "Transcript Office" tab is active. The form contains the following fields and controls:

- Contact Name**: A text input field.
- Transcript Office Addr.**: A text input field with a small upward arrow icon on the right.
- City**: A text input field followed by a small downward arrow icon.
- Country**: A text input field followed by a small downward arrow icon.
- Phone Number**: A text input field.
- Fax**: A text input field.
- Fee**: A text input field containing the value "0.00".
- Same**: A button located to the right of the "Fee" field.
- Buttons**: At the bottom of the window are three buttons: "Save", "Cancel", and "Close".

- 13 Enter the name and address information for the contact. If the address information for the contact is the same as for the school, click **Same**. The program will copy the school address information to the contact form.
- 14 If the school charges a fee to provide a transcript, enter that amount in the **Fee** box.
- 15 Click **Save** to save the high school information.
- 16 Click **Close** to close the High School Setup form.

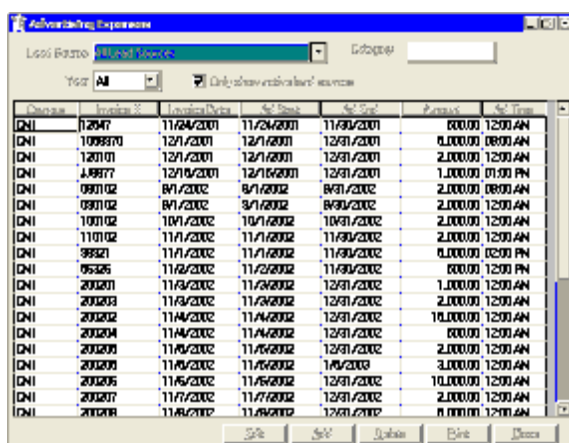
## Tracking Advertising Expenses

Many schools advertise in an effort to generate new leads. CampusVue provides a function by which you can enter advertising expenses, track these expenses, and compile a report that will connect advertising expenses to lead generation. This report compares data on recorded leads, lead sources, and money spent to generate those leads. The system collects its own statistics on lead numbers and sources, but you must provide the information on advertising expenses.

**Note:** A Lead Category is an advertising medium such as radio, TV, Internet, or newspapers. A Lead Source is a member of that group, such as a local radio or TV station or a particular newspaper. Examples of Lead Sources are National Public Radio, WSVN-TV, the New York Times, etc.

To add or edit an advertising expense in the Admissions module:

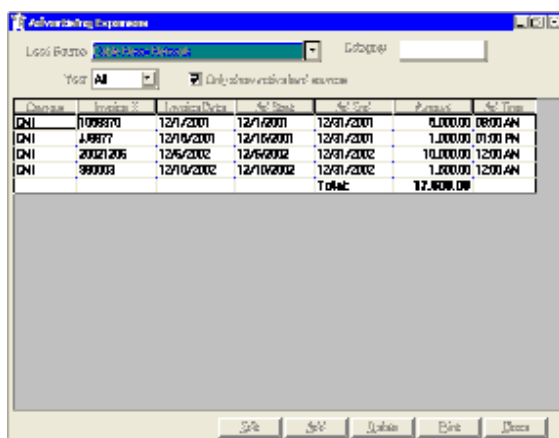
- 1 Select **Daily > Admissions > Advertising Expenses** to open the Advertising Expenses form. The form, which is a spreadsheet, defaults to show all entries.



The screenshot shows the 'Advertising Expenses' window. At the top, there is a 'Lead Source' dropdown menu set to 'All' and a 'Category' dropdown menu. Below these is a 'Year' dropdown menu set to 'All' and a checkbox for 'Only show recorded sources'. The main area is a grid with the following columns: Category, Location #, Location Name, Ad Start, Ad Stop, Amount, and Ad Time. The grid contains 18 rows of data, each representing an advertising expense entry.

Category	Location #	Location Name	Ad Start	Ad Stop	Amount	Ad Time
DNI	12047	11/24/2001	11/24/2001	11/30/2001	0.000.00	1200 AM
DNI	1099970	12/1/2001	12/1/2001	12/31/2001	0.000.00	0800 AM
DNI	120101	12/1/2001	12/1/2001	12/31/2001	2.000.00	1200 AM
DNI	149977	12/1/2001	12/1/2001	12/31/2001	1.000.00	0100 PM
DNI	090102	8/1/2002	8/1/2002	8/31/2002	2.000.00	0800 AM
DNI	090102	8/1/2002	8/1/2002	8/31/2002	2.000.00	1200 AM
DNI	100102	10/1/2002	10/1/2002	10/31/2002	2.000.00	1200 AM
DNI	110102	11/1/2002	11/1/2002	11/30/2002	2.000.00	1200 AM
DNI	99921	11/1/2002	11/1/2002	11/30/2002	0.000.00	0200 PM
DNI	05325	11/2/2002	11/2/2002	11/30/2002	0.000.00	1200 PM
DNI	200201	11/3/2002	11/3/2002	12/31/2002	1.000.00	1200 AM
DNI	200203	11/3/2002	11/3/2002	12/31/2002	2.000.00	1200 AM
DNI	200202	11/4/2002	11/4/2002	12/31/2002	10.000.00	1200 AM
DNI	200204	11/4/2002	11/4/2002	12/31/2002	0.000.00	1200 AM
DNI	200205	11/5/2002	11/5/2002	12/31/2002	2.000.00	1200 AM
DNI	200206	11/5/2002	11/5/2002	11/5/2003	3.000.00	1200 AM
DNI	200205	11/5/2002	11/5/2002	12/31/2002	10.000.00	1200 AM
DNI	200207	11/7/2002	11/7/2002	12/31/2002	2.000.00	1200 AM
DNI	200208	11/8/2002	11/8/2002	12/31/2002	0.000.00	1200 AM

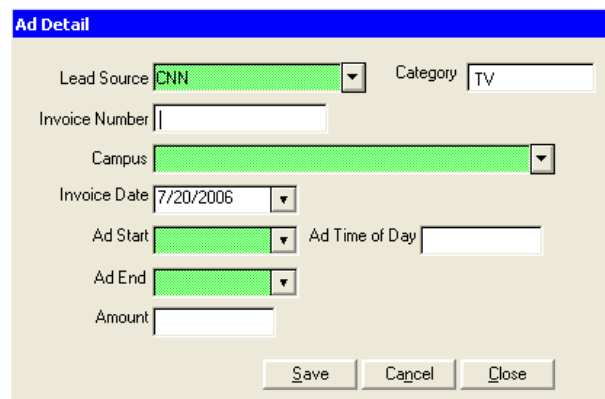
- 2 Select the **Lead Source** and **Year** with which you want to work. If you like, you can select **All** years. The grid will populate with a list of expenses that have already been recorded. The Category code will appear if you select a specific lead source.



The screenshot shows the 'Advertising Expenses' window with the 'Lead Source' dropdown set to 'All' and the 'Year' dropdown set to 'All'. The grid is filtered to show only recorded expenses. The grid has the same columns as the previous screenshot. The data is filtered to show only entries where the 'Ad Start' and 'Ad Stop' dates are within the selected year range. The total amount for the filtered entries is 17,000.00.

Category	Location #	Location Name	Ad Start	Ad Stop	Amount	Ad Time
DNI	1099970	12/1/2001	12/1/2001	12/31/2001	0.000.00	0800 AM
DNI	149977	12/1/2001	12/1/2001	12/31/2001	1.000.00	0100 PM
DNI	20021205	12/5/2002	12/5/2002	12/31/2002	10.000.00	1200 AM
DNI	999993	12/10/2002	12/10/2002	12/31/2002	1.000.00	1200 AM
Total:					17,000.00	

- 3 As you receive invoices for your advertising expenses, you will want to add those expenses to the spreadsheet. Click **Add** to open the Ad Detail form. The lead source and current date will already be filled in.



- 4 Select or type in the information to populate the fields on this form. You can change information about an existing expense or add a new expense in this form. Click **Save** to record your changes. Click **Close** to return to the spreadsheet view.
- 5 Notice the **Ad Start** and **Ad End** date range. Leads credited to this lead source during this time period will be used to calculate this lead source's performance.

You can print a report of all advertising expenses for a particular lead source.

**To print recruiting expenses for a selected lead source in the Admissions module:**

- 1 Select **Daily > Admissions > Advertising Expenses**. The Advertising Expenses form will appear in the work area.
- 2 Select the **Lead Source** and **Year** that you want to print. If you like, you can select **All** years. A list of expenses will appear.
- 3 Click **Print** to send the expense list to your printer.

See also the Lead Source Performance Report at **Reports > Admissions**.

## Tracking Admissions Documents

Schools strive to ensure that all required student documentation is received and processed in an orderly and timely fashion. Student documents include those that your institution requests from students themselves, those that come from persons or organizations connected with the student in some way, and those that you distribute as blank forms for your student to fill out and return to you.

In CampusVue, you can set up lists of these documents and assign them to each student record. You can then update the status of a document, the date the document was requested or received, and whether the document has been scanned into your electronic filing system.

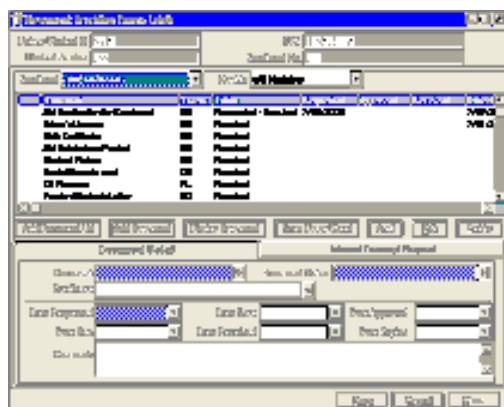
Monitoring student documents can be performed in two ways:

To see all documents relating to a particular student, open the student's Documents folder. Example: *Does Leigh Essex have all her Admissions paperwork on file?*

To see a particular document's status for many students at once, use the **Document Tracking** batch function available on the **Daily > Admissions** menu. Example: *How many students still do not have a high school transcript on file?*

## The Documents Folder

Each student has a Documents folder at **View > Contact Manager > Documents**. You can manage each student's documents individually using the Documents folder. (For more information, see the *Contact Manager and Document Tracking* user guide, or refer to CampusVue Help.)

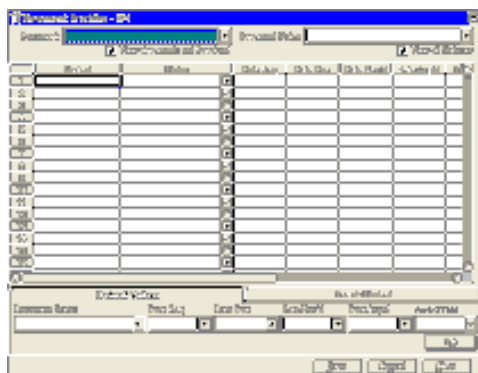


However, if you need to check the status of the same document for several students, it would be tedious to search for each student and open numerous Documents folders. In that scenario, the **Daily > Admissions > Document Tracking** batch process would be more efficient.

## Document Tracking Batch Process

To perform document tracking data for the Admissions module:

- 1 Select **Daily > Admissions > Document Tracking** to open the Document Tracking form.



- 2 Select a **Document** from the drop-down list and *all* students who have that document in their Documents folder will appear in the grid. Select a **Document Status** and the list will be filtered to show only those students with the selected document in the selected status. The information in the grid comes from students Documents folders.

	Student	Status	Date Rec'd	Date Due	Date Rec'd	Date Due	Date Rec'd	Date Due
1	Abbott, Victoria A	Required						
2	Adams, Cynthia	Required	8/25/2001	3/2/2001				
3	Adams, Kirby	Required	8/25/2001	3/2/2001				
4	Adams, Louis	Required	8/25/2001	3/2/2001				
5	Dunson, Kelly	Required	8/25/2001	3/2/2001				
6	Edwards, Carlos	Required	8/25/2001	3/2/2001				
7	Essex, Leigh	Required	7/25/2005					
8	Gibson, Nellie	Required	8/25/2001	3/2/2001				
9	Jones, Mike E	Required	8/6/2001					
10	Palmer, Claudia	Required	8/27/2001	3/2/2001				

- 3 To update this document for multiple students, select a student's line and edit the document parameters as required. Here we have updated Leigh Essex's high school transcript to show a status of On File. Then we clicked the **Date Rec'd** field to open a calendar which has the system date circled in red.

	Student	Status	Date Rec'd	Date Due	Date Rec'd	Date Due	Date Rec'd	Date Due
1	Abbott, Victoria A	Required						
2	Adams, Cynthia	Required	8/25/2001	3/2				
3	Adams, Kirby	Required	8/25/2001	3/2				
4	Adams, Louis	Required	8/25/2001	3/2				
5	Dunson, Kelly	Required	8/25/2001	3/2				
6	Edwards, Carlos	Required	8/25/2001	3/2				
7	Essex, Leigh	On File	7/25/2005					
8	Gibson, Nellie	Required	8/25/2001	3/2				
9	Jones, Mike E	Required	8/6/2001					
10	Palmer, Claudia	Required	8/27/2001	3/2/2001				

- 4 We clicked once on the date the document was received to close the calendar and enter the date in the grid.

Document Tracking - AM

Document: High School Transcript    Document's Status: Required

☒ View document's Previous    ☐ View all Documents

ID	Student	Status	Date Req	Date Due	Date Rec'd	Date Acptd	Award
1	Abbott, Victoria A	Required		8/25/2001	9/2/2001		
2	Adair, Cynthia	Required		8/25/2001	9/2/2001		
3	Daly, Kirby	Required		8/25/2001	9/2/2001		
4	Daniel, Louis	Required		8/25/2001	9/2/2001		
5	Duncan, Kelly	Required		8/25/2001	9/2/2001		
6	Edwards, Carla	Required		8/25/2001	9/2/2001		
7	Ewen, Leigh	On File		7/20/2005	7/20/2005		
8	Gates, Nellie	Required		8/25/2001	9/2/2001		
9	Jones, Mike E	Required		8/25/2001	9/2/2001		
10	Parker, Claudia	Required		8/27/2001	9/3/2001		

Default Values:    Search Student

Document Status:    Date Req:    Date Due:    Date Rec'd:    Date Acptd:    Award Year:   

- 5 Use the scroll bar to scroll to the far right of the grid where you will see a **Scanned** column. Click the **Scanned** box to indicate that you have scanned this document into your electronic filing system.
- 6 The **Default Values** tab permits you to update all students in the list to the same value.

Default Values

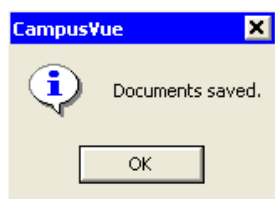
Document Status:    Date Req:    Date Due:    Date Rec'd:    Date Acptd:    Award Year:   

- 7 For example, select a Document Status and click **Set** to update all records in the grid to the selected status.
- 8 The **Search Student** tab permits you to locate an individual student in a lengthy list. Enter the student's SSN or Student ID and click **Filter** to reduce the displayed list to that student only. Click **Clear Filter** to return to the full list of records.

Default Values    Search Student

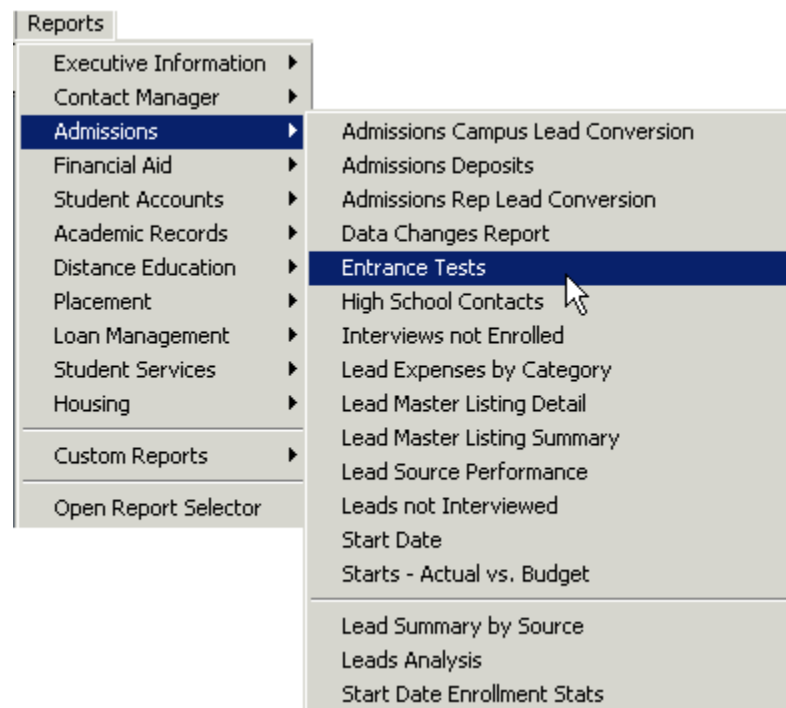
SSN:    Student ID:       

- 9 When all changes have been made, click **Save** to save your changes
- 10 Click **OK** on the confirmation message, and then click **Close** to close the Document Tracking form. The individual students' Documents folders will be updated with the new information.



## 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. An asterisk (\*) indicates a customized report designed for your institution(s). You can click **Reports > Admissions** to access reports associated with the Admissions 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**.)

### Entrance Tests

rpt\_AmEntranceTests.rpt  
ADMINISTRATOR

CampusVue  
Campus Management Institute  
- School Status (all)

Sorted by: Campus, Test, Student Name

Name Student ID	Status	Lead Br Lead Date Exam Fee Amount	Pre Ed Agency Fee Paid	App Fee Exam Date By Student	Program Exam Location	Test Score	Test Score Date Sched. Date Taken
<b>Campus Management Institute</b>							
<b>JTPA Registered Exam</b>							
Abbott, Karen A. 0902A00489	A	CUM 4/2/2001	H S	5/50/5005 04/04/2002	SCM	JTPA	D
Abbott, Karen A. 0902A00489	A	H S 04/04/2002	H S	5/50/5005 04/04/2002	SCM	JTPA	D
Abderson, Craig E. 0405A00560	ATT	1E1R 5/4/5001	Abbott, Karen A. H S	# Testers 04/04/2001 1/5/5001	FIN	Average Test Score: JTPA	D
Abderson, Ryan A. 0405A00470	PR DS	SS 12/7/1995 0.00	Abderson, Craig E. H S	# Testers 04/04/2002 0/5/5002	D	Average Test Score: JTPA	D
Adams, Gary M. 0404A00475	SP	SS 5/4/5001	Abderson, Ryan A. H S	# Testers 04/04/2002 0/5/5002	D	Average Test Score: JTPA	D
Adams, Joel 0902A00290	ATT	WES 04/04/2001	Adams, Gary M. H S	# Testers 04/04/2001 04/04/2001	FIN	Average Test Score: JTPA	D
Adams, John D. 0902A00145	SP	SS 4/20/2001	Adams, Joel H S	# Testers 0/50/1000 04/04/2001	FIN	Average Test Score: JTPA	D
Adams, Jeff 0902A00297	ATT	SS 04/04/2002	Adams, John D. H S	# Testers 0/1/5000 04/04/2002	FIN	Average Test Score: JTPA	D
Adams, Steve 0404A00475	SP	SS 5/4/5001	Adams, Jeff H S	# Testers 4/00/0000 0/5/5002	FAE	Average Test Score: JTPA	D



## 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, select **Reports > Admissions**. Choose the report you wish to run, and that report's Report Selection form opens. Each report has its own Report Selection form, with selection parameters and sort variables that pertain to that report.

For example, here is the Report Selection form for the **Entrance Tests** report:

On the **Selection** tab, identify those selection parameters that will gather the records you need for the report. Many of the filters on the left will represent fields in the Student Master form; date ranges and other parameters on the right will, for example, narrow your report to a particular time frame.

You do not need to make a selection for each parameter. Often you may need only two or three search parameters to satisfy your reporting requirements.

When you have made your selections, you are ready to preview your report.

## Report Preview

After you have selected the appropriate parameters from the Report Selection form, 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.

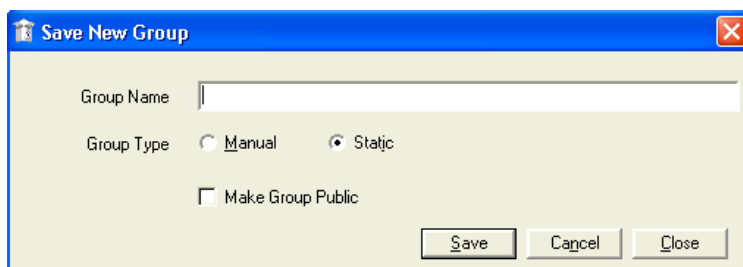
## Report Viewer Controls

### 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.

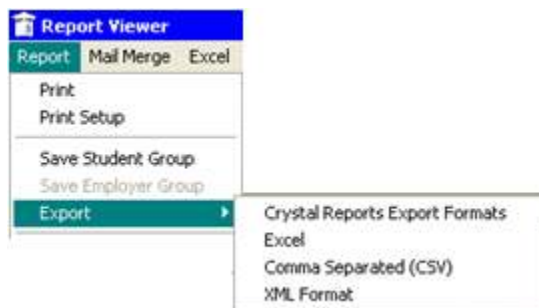
The following screen displays the **Save New Group** dialog:



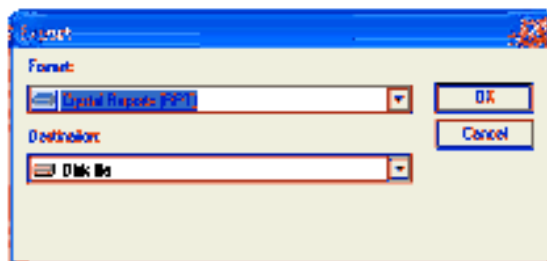
The "Save New Group" dialog box has a title bar with a blue background and a red close button. It contains a text field for "Group Name", a "Group Type" section with radio buttons for "Manual" and "Static" (where "Static" is selected), and a checkbox for "Make Group Public". At the bottom are "Save", "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:** functionality is the same as for Save Student Group
- **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.



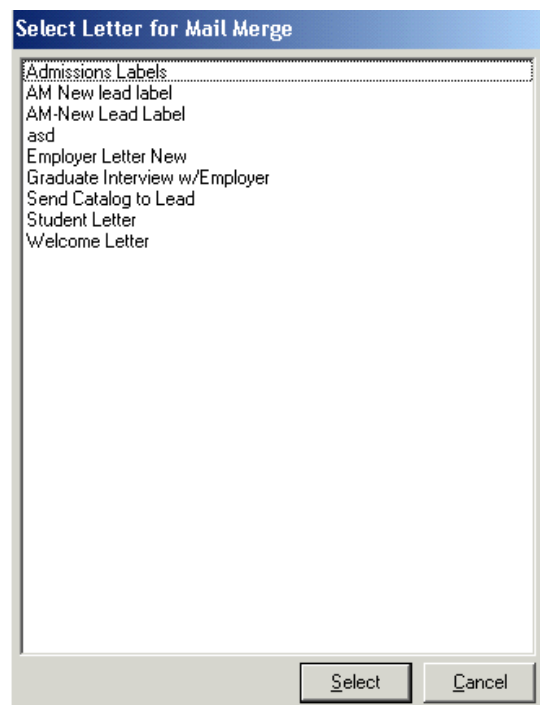
- **Close:** Select this option to close the Report Viewer form. You can do this before or after you print the report. The program will return to the Report Selection form.

## Mail Merge

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

1. Your school has letter activities related to students.
2. The path to the letter is correctly designated in **Setup > System**.
3. 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**, 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. However, 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.

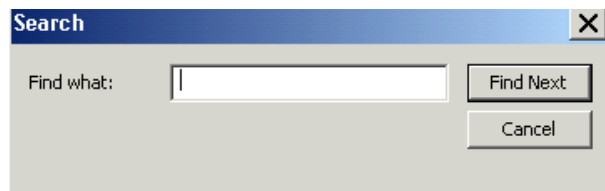
**Group Tree:** On the left side of the Report Viewer is a control known as the Group Tree. It is used to drill down to specific portions of your report. It is more significant in long reports and in those that have more than one or two groups. Click on the plus and minus boxes beside the group names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

If the report opens as an HTML document, you can right-click on the report and then select **Print** from the context-menu to print it.

## 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

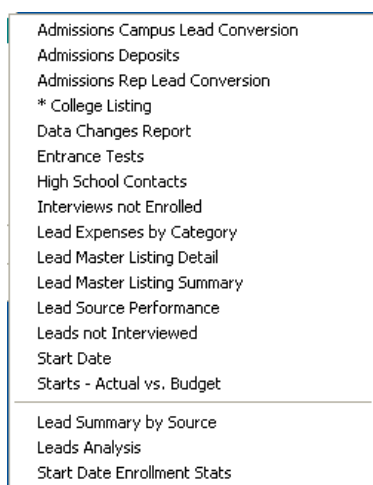
Charts and graphs

Export files to Excel

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

### To view a Cube Report:


- 1 Select **Reports > Admissions** > a cube report from the bottom of the menu.





← **Cube Reports**

- 2 When the Report Selection form opens, it may look unfamiliar, and may or may not be set up with selection criteria. 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, as 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.

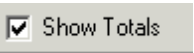
- 5 Across the top of the cube window are some important controls.

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

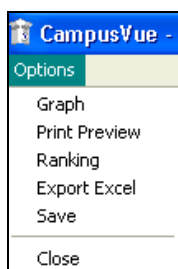
**Graph:**  Takes you to the graph design feature. You need to select the data elements you want in the graph before clicking Graph. Ordinarily, you would not want to graph the totals along with the data cells. To select data cells to be graphed, click one corner of the range with the left mouse button,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

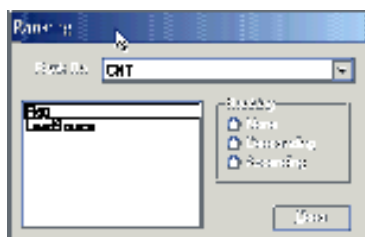
**Show Totals:**  You can elect to show or not show the totals on the report. If you want to export the data, you may not want to export the totals along with the data cells.

**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.

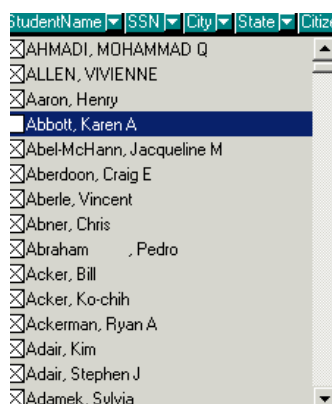


The example cube shows a three-dimensional report in a two-dimension format. Each row represents a student record. Subtotals and totals are shown for each row and column.

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.

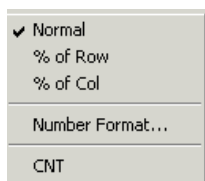


Another technique that you can use to tailor the cube is to select only portions of any one data element. For example, as we have done here, you can select or deselect from the list of student names.



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.

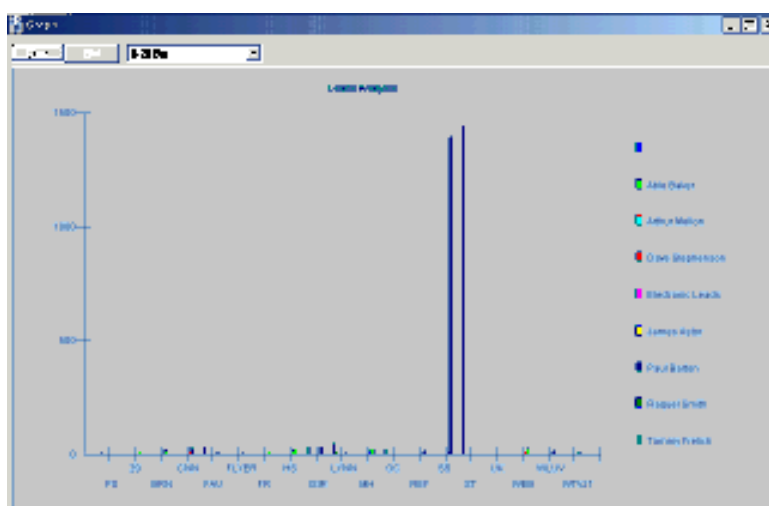
**Right Click Options:** If you right-click anywhere in the data area of the cube report, a menu appears with some important features listed.





- **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 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.

**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.

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

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