

Senior Admissions Office Release Bulletin

It is our pleasure to introduce you to the latest enhancements to Senior ADMISSIONS Office.

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Updates to Quick Entry and Inquiry Applicant Search Screens

We have added some enhancements to the **Quick-Entry Maintenance** and **Inquiry/Applicant Maintenance** Search screens, as well as a new query field which allows you greater options for search records.

New Student Wizard Added to Quick Entry and Inquiry Applicant Maintenance

We have added a **New Student Wizard** to **Inquiry/Applicant Maintenance** which enables you to search records that already exist in the system before creating a new record.

Global Tracking Feature Added to Admissions

We have added a new time-saving **Global Tracking** feature to **ADMISSIONS** which allows users to add a tracking item to multiple records in Inquiry/Applicant Maintenance all at once by using the query function.

Custom Fields in Administration Maintenance Expanded

You can now define up to thirty-five optional fields for recording information specific to your school in **Administration Maintenance**. Previously there were only fifteen custom fields available.

Mailings Tab Added to Inquiry/Applicant Maintenance

We have added a new **Mailings Tab** to **Inquiry/Applicant Maintenance** which displays all mailing items that have been sent to an applicant, as well as some new fields for adding comments and sent dates to some of the Mailings screens.

Checklist Groups Added to Inquiry/Applicant Maintenance

We have added a new **Checklist Groups** feature which expands the ways in which you can manage checklist items. This feature allows you to create checklist items for specific checklist groups, and then add an applicant to that group in **Inquiry/Applicant Maintenance** as needed.

Quick-Entry Maintenance and Inquiry/Applicant Maintenance Search Screen Enhancements

We have added some enhancements to the Quick-Entry Maintenance and Inquiry/Applicant Maintenance Search screens, as well as a new query field which allows you greater options for search records.

Search For	ecord Perseus Arg	gonis 🥵 🛐	ame sudent other other			Sort By Last Name First Name I.D. Grade Status Telephone	(Sort Key)	Sort Order Ascending Descending
Options Include Inquiries Year	2006 💌	Go To Tab	Nar	ne	•	School	Applying (AI)	
Name	ID	City	State	Adm Yr	Grade	Status	Telephone	Addr
Theodore Perseus Argonis		Muskegon	MI	2006	9	Applicant	(616) 777-7272	1771 East Apple Aver
Julie Darlene Benz	0000036	Charleston	SC	2006	9	Applicant		210 Spring Street
Winifred Any Burkle Malcolm Donald Duncan	0000033 DUN203	Woodway Wilmington	TX VT	2006	9 10	Applicant Applicant	(254) 666-1436	225 Hewitt Drive 1 Main Street
ا								

Sorting options are no longer selected using radio buttons. They have instead been redesigned into lists from which you can highlight your selections.

reens, allowing select from the

We have removed the ID field from the Inquiry/Applicant Search screen, making the Last Name field the primary field to use in searches. You can still search by ID by selecting the ID option in the Sort By area.

The Edit Button in both search screens now allows you to view recently opened records. You can select a record from this list to edit if you want. If you select Current Record from the list, the record currently highlighted in the list below opens.

Setting Edit History Preference Added

You can determine the number of recently opened records you want to display in the Edit History drop-down list in Edit History Preferences.

Click the Window Menu button 🔳 in the upper left-hand corner of the Inquiry/Applicant Search screen, and then select the Set Edit History option from the Window Menu.

The Set Edit History Preferences dialog opens.

Set Edit History Preferences	×
Number of recent items to show on search screen (Ma	x. 20) 10
<u>D</u> K	<u>C</u> ancel

Enter the number of records you want to display in the field provided. You can enter any number up to 20.

New Student Wizard Added to Quick Entry and Inquiry Applicant Maintenance

We have added a New Student Wizard to Inquiry/Applicant Maintenance which enables you to search records that already exist in the system before creating a new record.

The New Student Wizard opens when you click the New Button in the Inquiry/Applicant Maintenance Search screen. The first screen in the wizard, where you can enter search terms, is described below:

Enter the first and last name of the new Inquiry / Applicant:	Select Schools
(Partial names are OK)	✓ Lower School
First	✓ Middle School
Last	Upper School
Last	Summer School Employee
	Employee
	T
I know this Inquiry / Applicant is new and not in the system	already
	<< Prev Next >> Finish Cancel
Enter search terms in the fields provided	
•	d here, and selected the schools whose records you
want to search using the checkboxes pr	
want to search using the checkboxes pr least the first letter of a last name to cor	d here, and selected the schools whose records you rovided in the area on the right. You must enter at
want to search using the checkboxes pr least the first letter of a last name to cor	d here, and selected the schools whose records you rovided in the area on the right. You must enter at nduct a search. Once you enter your search terms, the Next button to search records. The Search
want to search using the checkboxes pr least the first letter of a last name to cor the Next button becomes active. Click t	d here, and selected the schools whose records you rovided in the area on the right. You must enter at nduct a search. Once you enter your search terms, the Next button to search records. The Search

screen appears, or hit the Enter key.

If you conduct a search in the previous screen, the Search Results screen, shown below, displays your search results:

	Name	Adm Yr	Grade	Status	Address	City	State	Telephone
1	Kirsten A Ahrendt	2002		Inquiry				
1	Athena Argonis	2005		Inquiry	1771 East Apple Avenue	Muskegon	MI	(616) 777-7272
	Theodore Perseus Argonis	2006	9	Applicant	1771 East Apple Avenue	Muskegon	MI	(616) 777-7272
							+	
-								
ď				•			j	
T	he Inquiry / Applicant is not li:	sted here, n	nust be n	ew				
							PT - 1 - 1	-
					<< Prev	Next >>	Finish	<u>C</u> ancel
							1	

If you do not see the record in the list, place a checkmark in this checkbox and click the Finish button to proceed to Inquiry/Applicant Maintenance, where you can create a new record for the applicant.

Custom Fields in Administration Maintenance Expanded

You can now define up to thirty-five optional fields for recording information specific to your school in Administration Maintenance. Previously there were only fifteen custom fields available.

Lines 1-30 are for text fields, and lines 31-35 are for dates. Each description can be up to twentyfive characters long and will appear in the Custom Tab of Inquiry/Applicant Maintenance.

🗃 Admissions Administration	_ 🗆 ×				
File Edit					
General Checklist Items Letters Interests Preferences					
School Address	Control Information				
Name Your School	Admission Year 2006				
Line 1 201 Boston Post Road West	Last ID				
Line 2 Marlborough, MA 01752	Last Inquiry I.D. 247				
Line 3	Inquiry I.D. Length 7				
	Last Family I.D. 250				
Field Prompts	200				
No Type Custom Prompts	No Rating Prompts				
1 Text Priority	1 Intellectual ability				
2 Text Region	2 Ethical sensitivity				
3 Text Financial Aid Package	3 Imagination & creativity				
4 Text	4 Motivation				
5 Text	5 Self-confidence				
6 Text	6 Communication skills				
Tout .					
	<u> </u>				

Global Tracking Feature Added

We have added a new time-saving Global Tracking feature to ADMISSIONS which allows users to add a tracking item to multiple records in Inquiry/Applicant Maintenance all at once by using the query function. (This feature must be added to the user's security in SYSTEM ADMINISTRATION before it can be used. Otherwise it will not be visible to users.)

For example, if you have sent the same invitation to all freshman applicants, you can enter the tracking once and then use a query to add it to whichever records you want in one convenient step.

To update records with a global tracking item simply select Global Tracking > Insert from the Maintenance menu. The Global Tracking Update screen show below opens.

Activity Date	Activity Type	Person	Search Topic 1	Search Topic 2	New
01-03-2007 Co	nventional Mail	DOCDBS8	Accepted Invite	First Weekend	Edit
					Delete
					•
ery List			1.	In Process	
plicants Fresh	nan Applicants		• 🥔 Year 2006 •	[
				QK Cano	

Use these buttons to manage items in the Global Tracking List. Clicking the New or Edit buttons opens Tracking Maintenance (see below). To delete an item from the list, highlight the item and then click the Delete button.

To select which applicant records you want to update with the new tracking information, select a pre-existing student query from this drop-down list, or create a new query as needed. Only those records included in the query will be updated with the items included in this list.

Click the OK button to add the item(s) included in the list to the applicant records selected in the query. A window opens which offers the option to print the pending changes. Whether or not you print the pending changes, all items will be added to the applicant records specified.

Inserting a New Global Tracking Item in Track Maintenance

Track Maintenance opens when you click the New or Edit buttons in the Global Tracking Update screen. You can add the date, the item type, specify follow-up action, and add any other details as needed.

Click the OK button to add the item to the Global Tracking Update screen. Clicking the Cancel button will close Track Maintenance without adding the item to the list.

Date Type	01-03-2007 Conventional Mail	Invitation to the First Weekend event for prospective freshman.
Person		
Follow-	Jp Action	
Date	01-10-2007 Today's	
Туре	Phone Call 📃]
Search	Topics	
	ed Invite 💌 First V	Weekend

Delete Global Tracking Item

Items entered in Global Tracking will display in the Track Tab in Inquiry/Applicant Maintenance for each record selected in the query. These items can of course be deleted Inquiry/Applicant Maintenance individually if needed.

To delete a tracking item from multiple records you can select Global Tracking

Delete from the Maintenance menu. The Global Tracking Delete screen described below opens.

🔝 Tracking G	lobal Update Delete	
Query List		
Applicants	Freshman Applicants	
Tracking	First Weekend Invite, 1/3/2007	_ 🔊
Year	(All)	
		QK <u>C</u> ancel
		NUM

Contact Tracking Added to Options in Student Print Dialog

When you select the Print button in Inquiry/Applicant Maintenance, the Student Print dialog shown on the right opens.

You can then select the checkboxes in this dialog as needed to determine which items you would like to include in the printed report.

We have expanded this list of options to include Content Tracking items.

Use these query fields to specify the tracking item you want to delete, and from which applicant records you want it deleted.

Click the OK button when you are finished. The system will tell you how many records will be affected by this change, and will prompt you to confirm that you want to delete the item.

Student Print - (Theodore P	erseus Argonis)	
Report Options		
🔽 Student Sheet		
- Include:		
🗖 Visits	Financial Aid	
Connection	Comments	
Also Print these Reports: -	F A 1 1 1	
Checklist Item List	Decision List	
🔲 Test Score List	Contact Tracking	
Print Options		
No. of Copies 1 Page	Range 1 To 9999	<u>S</u> etup
	<u> </u>	Cancel

New Mailing Tab Added in Inquiry/Applicant Maintenance

We have added a new Mailings Tab to Inquiry/Applicant Maintenance which displays all mailing items that have been sent to an applicant. This tab must be added to the user's security in SYSTEM ADMINISTRATION before it can be visible. Otherwise it will not be visible to users.

==	Inq	uiry / Applica	ant Maintenance - Theodore	Perseus Argonis (Applicant)			_ 🗆 ×
Na	ame	Address Info	Decision Checklist Visit Test 9	cores Fin Aid Connection Track Media Custom	Mailings * Comment	ts	
)	'ear	(All)	ļ				
		Date	Letter Type	Description			-
		01-02-2007	Student / Parent	Application supplementary materials			
		01-02-2007	Student / Parent	Financial aid information packet			
		01-02-2007	Student / Parent	Parent information packet			<u>D</u> elete
							.
			i	1	1		_
				<u>0</u> K	<u>C</u> ancel	<u>P</u> rint	<u>D</u> elete
							NUM

All information on this tab updates automatically for applicants when they are included in Student/Parent, Checklist, or Student Advisor Mailings. Items can be deleted from an applicant's record by highlighting the item and then clicking the Delete button.

The information includes a date and description for each mailing item. This information is entered when you create the mailing, and we have added Mail History Description and Sent Date fields to the Student/Parent, Checklist, or Student Advisor Mailing screens, as well as Inquiry, Followup, Decision, and Checklist Letters screens for this purpose.

📰 Student / Parent Mailing	
Labels/Envelopes Build Merge File Name Format As Saved Select Full Name Include Preferred Name	Output Type Form Type Label (Laser 2 x 4) Form Options Start at Label Row 1 Column 1
✓ Show Count Sele ✓ Exclude Blank Addresses Sele ✓ Include Active Addresses Only Sele ✓ Include Active Addresses Only (no compared to the second se	ry List ct Applicants [All] ct Addresses [All] sptions to select) rg conditions (Default Sort) r
Mail history description Winter Weekend In	vitations.
Sent Date 01-05-2007	
	PrintP

Checklist Groups Added to Inquiry/Applicant Maintenance

We have added a new Checklist Groups feature which expands the ways in which you can manage checklist items. This feature allows you to create checklist items for specific checklist groups, and then add an applicant to that group in Inquiry/Applicant Maintenance as needed.

Checklist groups are created in SYSTEM ADMINISTRATION. Checklist items are then added to a checklist group in Administration Maintenance. Once added to a specific checklist group, a checklist item is only available in an applicant record when you add the applicant to the checklist group in Inquiry/Applicant Maintenance.

This feature is useful if you want to create checklist items which would only apply to a specific category of applicant (*e.g.*, international students).

Setting Up Checklist Groups in System Administration

You can create a checklist group by opening Code Maintenance in SYSTEM ADMINISTRATION, and then selecting the Admissions Checklist Groups option from the Select a Code drop-down list. The screen shown below appears.

Code Maintenance		
Codes		
Select a code Admissio	ns Checklist Groups	•
Group	Sort Order	<u>N</u> ew
	1	Delete
	<u>0</u>	K <u>A</u> pply <u>C</u> ancel
		NUM

Click the New button to add an active field to the list, then enter the name and sort order of the checklist group in the fields provided.

Click the Apply button to make the new checklist group available in ADMISSIONS.

Adding a Groups of Applicants to a Checklist Group

You can also add or remove groups of applicants to a checklist group using our new Applicant Checklist Group Update feature, as described below.

	ery List		
App	licants Internati	ional Applicants	💌 🎒 Year 2006 💌
Step 2 · Sele	ct Checklist Groups	Ĵ.	
	Group	Select	
Inter	national	N N	
/			
Step 3 - Sel	lect the operation		
100 march 100	lect the operation dd selected Groups	to Applicants	
G Ad	dd selected Groups	to Applicants	
© A	dd selected Groups emove selected Gro	oups from Applicants	items from the Applicant records!
© A	dd selected Groups emove selected Gro	oups from Applicants	
© A	dd selected Groups emove selected Gro	oups from Applicants	Rems from the Applicant records!
© A	dd selected Groups emove selected Gro	oups from Applicants	<u>QK</u> ancel
© A	dd selected Groups emove selected Gro	oups from Applicants	
G Ar	dd selected Groups emove selected Gro ote: Removing the t	oups from Applicants Groups will delete the checklist	QK Cancel
C R N Use the	dd selected Groups emove selected Gro tole: Removing the l e query fun	oups from Applicants Groups will delete the checklist Inction to select wh	<u>QK</u> ancel

Select the checklist groups(s) to which you want to add the applicants. All checklist groups that you have created in Administration Maintenance are listed here.

Selecting "Add selected Groups to Applicants" will add all checklist items associated with the checklist groups(s) you have selected to the applicant records. You can also remove applicants from a checklist group by selecting "Remove selected Groups to Applicants.

Click the OK button to save your settings.

Adding Checklist Items to Specific Checklist Groups in Administration Maintenance

Checklist items are created in the Checklist Items tab in Administration Maintenance. When you create or edit a checklist item, you will see a new Group drop-down list.

This drop-down list will contain all groups created in SYSTEM ADMINISTRATION. To add a checklist item to a specific group, simply select the group from this list as described below.

Create New C	hecklist 🛛 🔀				
Checklist Info	Checklist Information				
Sort Number	Sort Number 5				
Name	Bank Draft				
	Required				
Group	International				
	<u>Q</u> K <u>C</u> ancel				
checklist	name and sort number for the item in the fields provided.				
specific g Administr	nt to add the checklist item to a roup created in System ation, select it from this drop- The default setting for this				

The name of the Checklist Group will appear in parentheses after the name of the checklist item. As always, checklist items have to be added to school grades before they can be added to an applicant's record in Inquiry/Applicant Maintenance.

field is NONE.

E Admissions Administration File Edit	
General Checklist Items Letters Interests Preferences School-Grades - (19) School-Grades - (19)	Checklist Items - (5) ♥ 5) - Bank Draft - [International] ♥ 10) - Transcript ♥ 20) - Teacher Recommendation ♥ 30) - Physical Form ♥
	New Checklist Edit Delete
	<u>D</u> K <u>C</u> ancel
1 items selected.	NUM

Adding a Single Applicant to a Checklist Group in Inquiry/Applicant Maintenance

Once the checklist group has been created, you can then add an applicant to the checklist group in the Checklist Tab in Inquiry/Applicant Maintenance by clicking the Select Groups button shown below.

hecklists	Inquiry Type ent Dpen House			App Fee I Applicatio	n Type	T Aq	Waived By	
	belongs to the follow Dheckäst Item	ing cheo	Activity Date	Letter	imational ar	nd default checklis Print Date	Notes	Reg
Physical P	om		1		0			
Transcript								R
Interests (uestionnaire		1					
	lecommendation		1 2					
→ Bank Dra	1	0			-			9

The Select Checklist Groups dialog, shown below, opens.

Select Checklist Groups	×
Select Checklist Groups	
✓ International	A
	7
	Coursel 1
<u> </u>	Cancel

To add an applicant to a checklist group, select the checklist group in the list that applies to the applicant, and then click the OK button.

Once the checklist group is selected, all checklist items associated with the checklist group will appear in the applicant's list of checklist items.