



# Senior Admissions Office Release Bulletin

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

## 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.

Name	ID	City	State	Adm Yr	Grade	Status	Telephone	Address
Theodore Perseus Argonis	ARG103	Muskegon	MI	2006	9	Applicant	(616) 777-7272	1771 East Apple Avenue
Julie Darlene Benz	0000036	Charleston	SC	2006	9	Applicant		210 Spring Street
Winifred Amy Burkle	0000033	Woodway	TX	2006	9	Applicant	(254) 666-1436	225 Hewitt Drive
Malcolm Donald Duncan	DUN203	Wilmington	VT	2006	10	Applicant	(802) 464-2233	1 Main Street

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


A query field has been added to both the Quick-Entry and Inquiry/Applicant Search screens, allowing you to search for student records using your existing student queries, which you can select from the drop-down list. You can also create a new query if needed.

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.

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

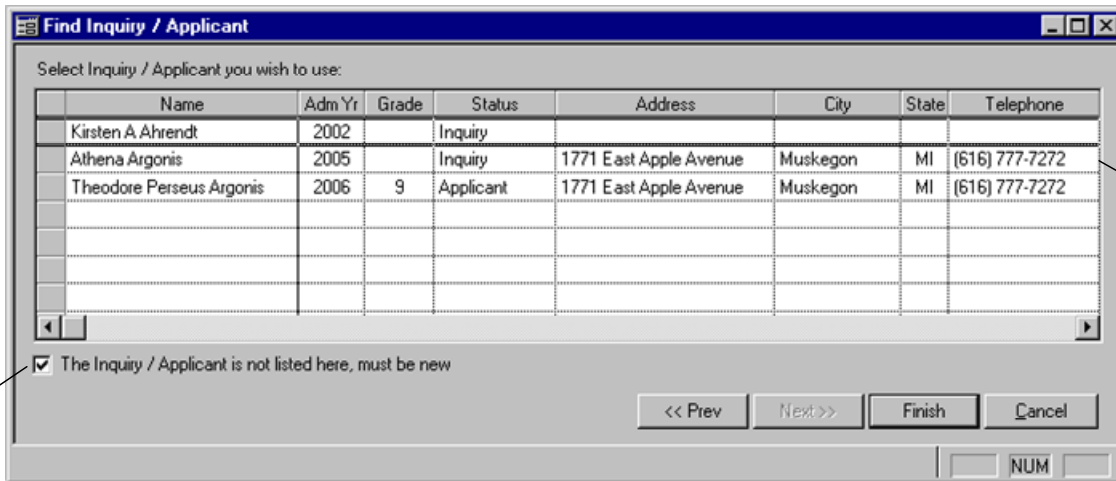
We have added a New Student Wizard to Inquiry/Applicant Maintenance which enables you to search records that already exist in the system before creating a new record.

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 search terms in the fields provided here, and selected the schools whose records you want to search using the checkboxes provided in the area on the right. You must enter at least the first letter of a last name to conduct a search. Once you enter your search terms, the Next button becomes active. Click the Next button to search records. The Search Results screen, described on the next page, opens.

If you know that the record you want to enter is new simply click the Finish button when this 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:



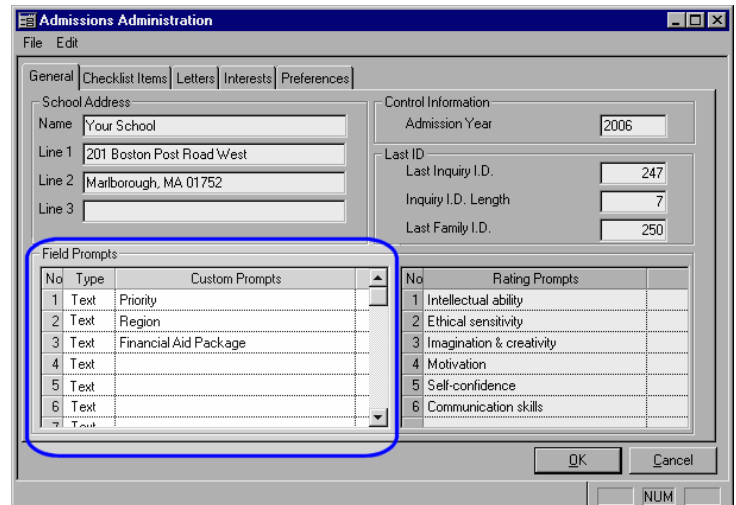
Search result will display in the main area. If you see the record you are searching for in the list, you can highlight it and click the Finish button to proceed to Inquiry/Applicant Maintenance.

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 twenty-five characters long and will appear in the Custom Tab of Inquiry/Applicant Maintenance.



## 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.

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.

## 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.

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.

## Contact Tracking Added to Options in Student Print Dialog

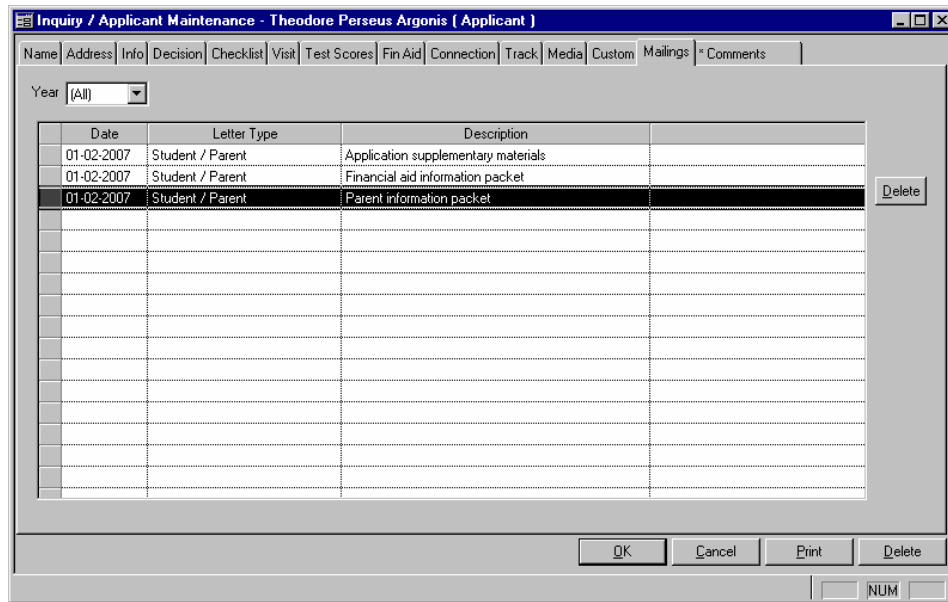
When you select the Print button in Inquiry/Applicant Maintenance, the Student Print dialog shown on the right opens.

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.

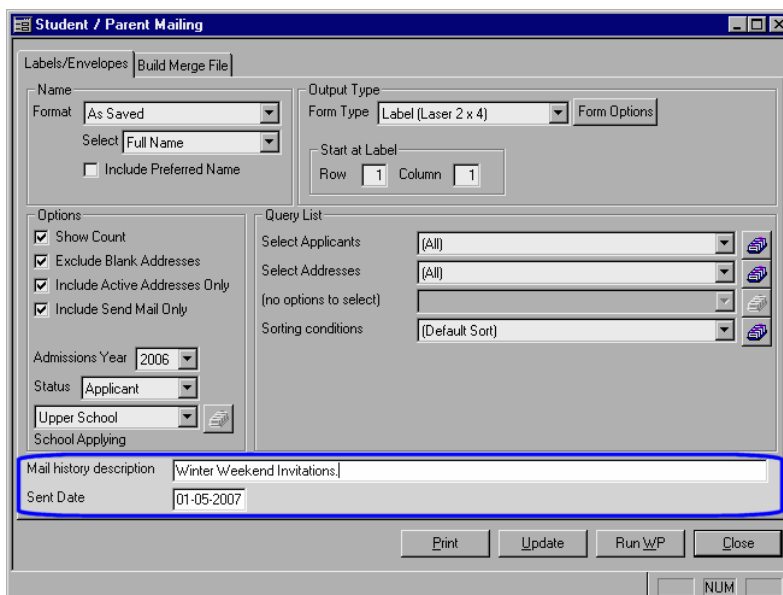
## New Mailing Tab Added in Inquiry/Applicant Maintenance

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.



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.



## Checklist Groups Added to Inquiry/Applicant Maintenance

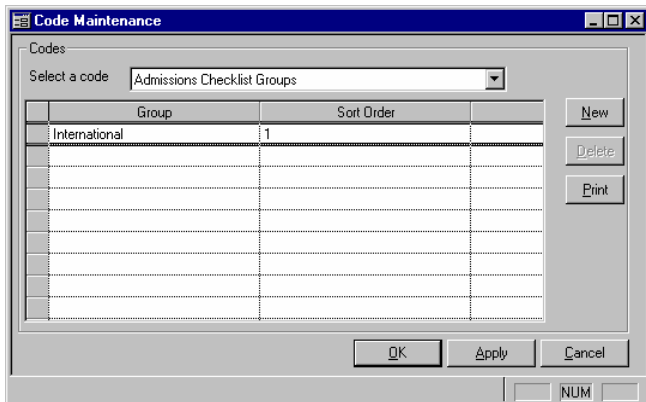
We have added a new Checklist Groups feature which expands the ways in which you can manage checklist items. This feature allows you to create checklist items for specific checklist groups, and then add an applicant to that group in Inquiry/Applicant Maintenance as needed.

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.

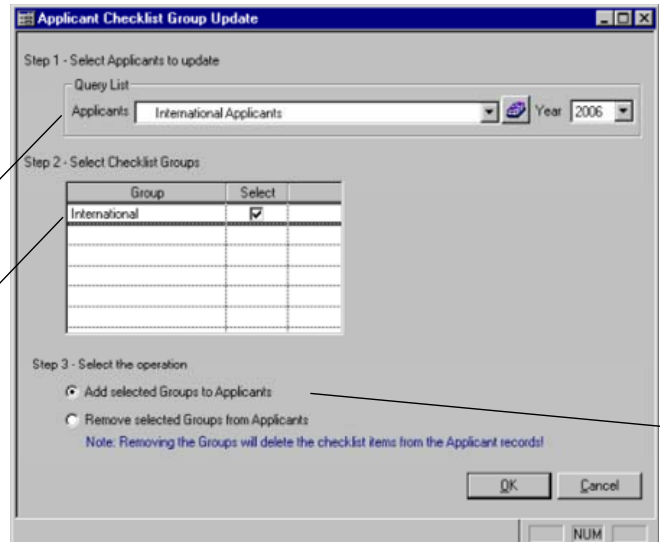


Click the New button to add an active field to the list, then enter the name and sort order of the checklist group in the fields provided.

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.



Use the query function to select which applicant records you want to add to the checklist group. In this example, we have selected all international applicants.

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."

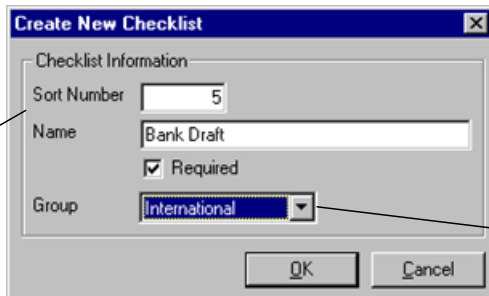
Click the OK button to save your settings.



## 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.

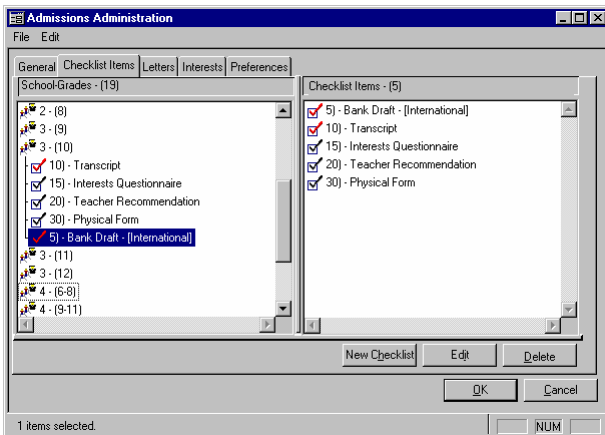
This drop-down list will contain all groups created in SYSTEM ADMINISTRATION. To add a checklist item to a specific group, simply select the group from this list as described below.



Enter the name and sort number for the checklist item in the fields provided.

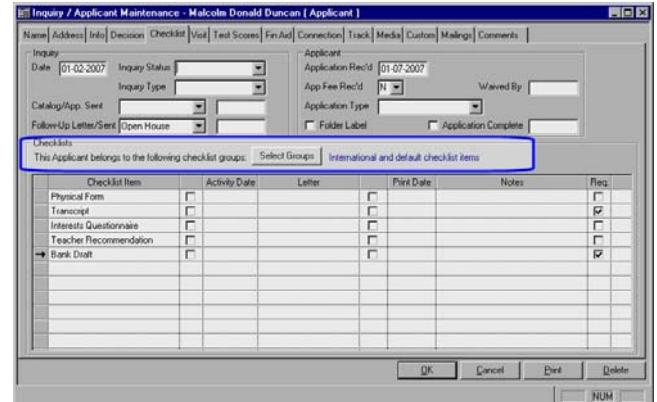
If you want to add the checklist item to a specific group created in System Administration, select it from this drop-down list. The default setting for this field is NONE.

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.



## 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.



The Select Checklist Groups dialog, shown below, opens.



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.