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Configuration is an important area in which you make decisions and define settings that affect the overall success of Admissions Office. If you have just installed or converted to Admissions Office, be sure to follow the procedures in the order established on the Set up Admissions Office page in Administration.

In Admissions Office, Configuration provides a central location for settings and features you use to customize your admissions processes. These settings affect functions and details that can increase the efficiency of your record keeping, speed data entry, provide for security checks-and-balances, and generally optimize the performance of Admissions Office. For example, you can define tracks, which are groups of items and actions that can be automatically added to applicant records to automate the admissions process.

You can define business rules affecting processes in your program, such as setting criteria to prevent duplicate applicant, faculty/staff, individual, and organization records from being entered into the program.

With other Configuration features, you can define table entries to speed data entry. You can rename fields to reflect your organization’s terminology, hide fields, or make fields required on certain types of records. You can also customize the program by creating special categories of information called attributes and attaching them to your records to aid in tracking and reporting.

Because Configuration impacts the entire program, it is closely linked to Security. You should allow only users with supervisor rights access to Configuration. With table entries in particular, it is important that you limit access to adding and editing rights to maintain consistency in your database. School records are accessible only to users with Supervisor rights.

If you have Registrar’s Office, certain configuration areas are shared between Admissions Office and Registrar’s Office, including General, Academic Years, Events, Promotion Schedules, Address/Salutations, Attributes, International, Business Rules, Tables, and Fields. For example, if you define an event record in Admissions Office, you can also open the same record in Registrar’s Office. Be sure to educate users in these programs that these areas are shared. For more information about configuring Registrar’s Office, see the Configuration Guide for Registrar’s Office.

Configuration Links

Note: You can also open the Configuration page by selecting Go, Configuration from the shell menu bar.
The Configuration page contains links to help you define settings for Admissions Office. To access the Configuration page, click Configuration on the navigation bar. The Configuration page appears.

Links on the Configuration page include:

**Note:** Contact Customer Support at easupport@blackbaud.com to change your organization name in the program.

**General.** Click this link to change your organization’s contact information. From the General page, you also manage school records for your organization.

**Academic Years.** Click this link to manage academic year records.

**Events.** Click this link to define calendar events for the entire organization or for one or more specific schools.

**Tracks.** Click this link to define groups of items and actions that can be automatically added to applicant records to automate the admissions process.

**Promotion Schedules.** Click this link to define how students progress through grade levels within and across schools.

**Addressee/Salutations.** Click this link to create various addressee and salutation formats that appear throughout the program and on mailings and reports. Standard addressee/salutation formats can help ensure consistency.

**Attributes.** Click this link to define types and characteristics of attributes you can assign to records in the program, such as applicant and individual records. Attributes are bits of useful information you can attach to a record for tracking or reporting purposes.

**Letters.** Click this link to define letter descriptions and associate letters with Word merge files.

**International.** Click this link to define international address formats.

**Business Rules.** Click this link to set standard procedures and requirements in the program. Because business rules affect the fundamental processes of the program, we recommend an administrator carefully review and implement these settings.
Tables. Click this link to access the Tables page, the central location for adding and editing Admissions Office tables. Using tables increases data entry speed and accuracy by providing lists of entries users can quickly access. Various pre-existing table entries appear on the Tables page for your convenience. If a table entry becomes obsolete, you can make it inactive.

Fields. Click this link to view or change field characteristics for each record type. You can enter a different name for a field, require a field, and hide a field. You can also view which fields are lookup fields containing table entries from which you can select.

Test Type Definitions. Click this link to define subtests for each test type.

Test Equivalents. Click this link to define the equivalent test type translations for each test type.

Recruiter Calculations. Click this link to access the Recruiter Calculations page where you can create and edit calculation records. Use calculation records to assign recruiters based on specific settings, such as geographic market and applicant status.

General Configuration

On the General page in Configuration, you can manage your organization’s basic contact information and records for schools in your organization.

Organization Information

Note: If you also have Registrar’s Office, organization information is shared between Admissions Office and Registrar’s Office.

You can define default contact information for your organization, including country, address, city, state, ZIP, and phone.

- Adding organization information
  1. From the Configuration page, click General. The General page appears.
2. Your organization’s name appears at the top of the page. Confirm your organization name appears correctly. You can contact Customer Support at easupport@blackbaud.com to change your organization name in the program.

3. In the **Country** field, select the home country of your organization.

4. Enter your organization’s contact information in the address and telephone fields.

5. When you exit the General page, your organization information is saved automatically.

### Schools

**Note:** If you also have *Registrar’s Office*, school records are shared between *Admissions Office* and *Registrar’s Office*.

You can manage records for one or multiple schools. If you are installing *Admissions Office* for the first time, or if you are adding a new database, a school record automatically appears using your organization’s name with all grade levels selected. Only users with Supervisor rights can add school records.

In *Admissions Office*, you can associate applications with schools. School records are more important if you have *Registrar’s Office*. If you have *Registrar’s Office*, consult with the users of *Registrar’s Office* before adding schools through *Admissions Office*. Determining whether to use one or create multiple school records is an important decision to make before beginning daily operations in *Registrar’s Office*. Adding or removing a school after entering data will be time-consuming.

- **Adding a school**

  On a school record, you define the address of the school, associate grade levels with the school, and designate the school as single gender or coeducational.

  1. From the Configuration page, click **General**. The General page appears. The schools grid is at the bottom of the page.
2. To add a new school record, click **New School** on the action bar. The New School screen appears.

3. In the **School ID** field, enter a unique identification code for the school.

4. In the **Name** field, enter the full name of the school.

5. The **Country, Address, City, State, ZIP, and Phone** fields automatically fill in with the values you entered on the General page. You can edit this information for each school, for example, if you have different campuses.

6. All grade levels are selected by default. To select specific grade levels to include, click the binoculars in the **Grade levels** field. The Selected Grades screen appears.

7. Select grade levels in the box on the left and click the right arrow to move them into the **Include these grades** box.

8. To save your selections, click **OK**. You return to the New School screen and the selected grade levels appear in the **Grade levels** field.

**Note:** If you associate a school with a single gender, this affects other areas of the program associated with the school. For example, if you select a single gender school in **School apply** on a new applicant record, the gender automatically appears in the **Gender** field.

9. In the **School gender** field, select “Coed”, “Female”, or “Male” to designate whether the school is single gender or coeducational.
10. In the **Current year** field, the current academic year appears based on the date ranges of the academic years you define. If a current academic year has not been defined, “N/A” appears.

11. To save the school record and return to the General page, click **Save and Close**.

**Copying a school**

To save time when setting up similar school records, you can copy one school record, edit it, and then save it with a new name.

1. From the Configuration page, click **General**. The General page appears. The schools grid is at the bottom of the page.
2. To copy a school record, select the school in the grid and click **Copy from** on the action bar. The New School screen appears containing the same information as the selected school record, except for the school ID and name.

![New School Screen](image)

3. Enter a new school ID and name and make any other changes to the school record.
4. To save the school record and return to the General page, click **Save and Close**.

### Making a school inactive

**Note:** You must have at least one active school.

You cannot delete a school record if it is selected on an applicant, faculty/staff, or academic year record or status log entry. However, if a school has been used but is no longer needed, you can mark it as inactive.

**Note:** To view inactive schools in the grid, mark **Show Inactive Schools**.

1. From the Configuration page, click **General**. The General page appears. The schools grid is at the bottom of the page.

![Configuration General Screen](image)

2. To open a school record, select the school in the grid and click **Open** on the action bar. The school screen appears.
3. Mark **Inactive** beside the **School ID** field.

4. To save the school record and return to the General page, click **Save and Close**.

**Academic Years**

On the Academic Years page in *Configuration*, you can manage information about academic years for each school. By defining an academic year, you define an entire school year, such as 2005-2006, for which applicants are applying.

From the Calendar Events tab of an academic year record, you can view and add events for the year. You can also view the school calendar from an academic year record. For more information about events and the calendar, see “Events” on page 19.

**Note:** If you also have **Registrar’s Office**, academic year records are shared between **Admissions Office** and **Registrar’s Office**.

If you also have **Registrar’s Office**, academic year records are shared between **Admissions Office** and **Registrar’s Office**. With **Registrar’s Office**, an academic year record also contains session records and settings for how to track attendance and enter grade comments. For more information about how the registrar’s office uses academic year records, see the **Configuration Guide for Registrar’s Office**.

- **Adding an academic year**
  1. From the Configuration page, click **Academic Years**. The Academic Years page appears.
2. On the action bar, click **New Academic Year**. The New Academic Year screen appears.

![New Academic Year screen](image)

3. In the **School** field, select the school to associate with the year. The **School** field appears only if you have more than one active school.

**Note:** You can click the **Academic Year** field label to access the **Academic Year** table.

4. In the **Academic year** field, select or enter a short description for the academic year. If you enter a new academic year description, a message appears asking if you want to add it to the **Academic Year** table.

5. In the **Description** field, you can enter a longer description of the academic year for reference.

**Note:** The date range of one academic year cannot overlap another academic year defined for the school. An academic year cannot exceed 12 months.

6. In the **Start date** field, enter the first day of the academic year. In the **End date** field, enter the last day of the academic year.

7. If you have **Registrar’s Office** installed, the **Track attendance by** field, **Grade comments entry** field, and the **Sessions** grid appear. In the **Track attendance by** field, select how to track attendance for the year:
   - If you select “Class or Day”, you enter and report on both class and full day attendance in the academic year.
   - If you select “Day only”, you enter and report on half day and full day attendance in the academic year.

   For information about how this setting affects how you define attendance codes and how the program calculates attendance, see “Attendance Codes” on page 163 in the **Configuration Guide for Registrar’s Office**.

8. In the **Grade comments entry** field, select “Freeform” or “Numeric”. If you select “Freeform”, users can enter free-form text. If you select “Numeric”, users enter default comments by comment number.

   You define comments in Registrar Setup. For more information about default comments, see “Default Comments” on page 54 in the **Configuration Guide for Registrar’s Office**.
9. If you selected “Freeform” in the Grade comments entry field, you can set the length allowed for a comment. Mark Limit comment length to [ ] characters and enter the number of characters. The default is 8000.

10. Select the Calendar Events tab.

Note: To open the calendar, click the calendar on the toolbar.

11. You can add and edit events from the Calendar Events tab. For more information about events, see “Events” on page 19.

12. To save the record and return to the Academic Years page, click Save and Close. Or, to define sessions of the academic year, continue with the next procedure.
Adding a session

Sessions are time frames with different schedules within an academic year, such as Fall, Winter, Spring, and Summer. The sessions grid appears only if you have *Registrar's Office* installed.

1. On the academic year record, select the General tab. The sessions grid is at the bottom of the screen.

2. To add a new session, click **New Session** on the action bar. The New Session screen appears.

3. In the **Session** field, select or enter a name for the session. If you enter a new session name, a message appears asking if you want to add it to the **Session** table.

4. In the **Marking columns** field, select the marking column set to associate with the session.
   - To add a new marking column set, leave the field blank and click the magnifying glass. To view details of a marking column set, select the marking column set and click the magnifying glass.

5. In the **Timetable** field, select the timetable to associate with the session. The timetable determines the cycle days of the session.

*Note:* You can click the **Session** field to access the **Session** table.
To add a new timetable, leave the field blank and click the magnifying glass. To view details of a timetable, select the timetable and click the magnifying glass.

6. To keep a record of classes dropped, added, transferred, or withdrawn and changes in enrollment type for students, mark **Track schedule changes beginning on** and enter the date to begin tracking this information. The date can be the current date or later, and can be before the beginning of the academic year but not after the end of the academic year. For example, you may not want to track changes until the first day of classes when the drop/add period begins.

We recommend you establish communication with the schedulers who need to know when changes are being tracked. If multiple users are scheduling for the same school, academic year, and session, be sure that all of these users are aware if you change this setting. Be aware that if you turn this setting on and off, the changed records may not match student schedules.

If you later change this date or unmark the checkbox, the changes already recorded are not deleted.

**Note:** You cannot edit the **Days in session** grid after classes are created.

7. In the **Days in session** grid, mark the days of the calendar week that classes can meet.

8. In the **Available patterns** box, mark checkboxes for the patterns to associate with the session. This controls the patterns that are available to associate with courses for the session.

9. In the **Set these marking columns as view-only in grades** box, you can mark checkboxes to make marking columns uneditable in **Grades**.

Note: You cannot edit the **Days in session** grid after classes are created.
10. Select the Terms tab.

![Image of a window with columns for Term, Start Date, Withdrawal Date, End Date, and First Day of Cycle]

**Note:** We recommend you do not overlap terms because this can cause scheduling errors.

11. In the **Term** column, select or enter the name of the term. If you enter a new term, a message appears asking if you want to add it to the **Term** table.

12. In the **Start Date** column, enter the first date of the term.

13. In the **Withdrawal Date** column, enter the last date of the term that a student can drop a course. Report cards and transcripts do not list dropped courses. Report cards and transcripts list withdrawn courses.

**Note:** You cannot edit the start date or first day of cycle of a term after attendance exists in the term.

14. In the **End Date** column, enter the last date of the term.

15. In the **First Day of Cycle** column, select the cycle day to start with to initially assign cycle days to dates in each term.

   It is important to select the correct first day of cycle, because you cannot change the cycle day assigned to a date after attendance is entered on that date.
16. Make sure you arrange the terms chronologically in the grid. You can use the Up and Down buttons to rearrange the terms. Chronological order is important when scheduling classes in terms, especially multi-term courses.

![Grid with terms arranged chronologically](image1)

**Note:** You can add scheduling calendar entries only within the dates of the terms of the session.

17. Select the Scheduling Calendar tab.

![Calendar with scheduled dates](image2)

**Note:** Only one scheduling calendar entry can exist for one date per term.

18. To filter the scheduling calendar entries by term, you can select one term or all terms in the Terms field. To filter the scheduling calendar entries by date, "<All Dates>", "Before Today", or "On or After Today" in the Show field.

19. In the Date column, enter the date that is the exception. The term the date occurs in appears in the Terms column.
20. If classes can occur on the date, mark the checkbox in the In Session column. If classes should not meet on the date, unmark the checkbox.

21. If you do not mark In Session, the Skip? column is enabled. Because you are marking the date as not in session, designate how to calculate the next cycle day in session. For example, you have A, B, C, D, and E days and set up scheduling calendar entries on A and B days.

Note: You cannot skip a cycle day if attendance exists after the date.

- If you mark Skip?, the next date school is in session starts with cycle day of the date you skip. In this case, the program resets the next date to an A day and updates the sequence.

Warning: When skipping a cycle day for one school but not another, you can create potential class schedule conflicts with students, teachers, and rooms that were not originally found when scheduling.

- If you do not mark Skip?, the next date in session stays the same, in this case, a C day.

22. If you mark In Session, the Cycle Day column is enabled. In the Cycle Day column, enter the cycle day for the date. This resets the sequence of subsequent dates in the scheduling calendar. For example, you may want three A days in a row.

23. In the Notes column, enter an explanation for the entry.

24. To save the session and return to the academic year record, click OK.

Copying an academic year

Note: Before copying an academic year, you must define the description of the academic year to which you are copying information. You define academic year descriptions in the Academic Year table in Configuration.

To save time when setting up similar academic year records, you can copy one academic year record to another academic year.

1. From the Configuration page, click Academic Years. The Academic Years page appears.

Note: If the admissions office already created the academic year, you can still copy the registrar’s information into the academic year.
2. Select the academic year to copy and click *Copy from* on the action bar. The Copy Academic Year screen appears.

3. In the **School to copy to** field, select the school to which to copy the academic year.

4. In the **Academic year to copy to** field, select the academic year to which to copy the academic year.

5. In the **Start date** and **End date** fields, by default, the program copies the month and day from the original academic year and then adds a calendar year. You can edit these dates.

The sessions and terms of the academic year appear in a grid.

6. In the **Start Date**, **End Date**, and **First Day of Cycle** columns of the grid, enter the dates and first cycle days of each term.

7. In the **Copy this information** box, mark the information to copy.
• If you mark Course grades information, the program copies the Grades tab of grading information on course records for the academic year to the same course records for the new academic year. Information does not copy to courses marked as no longer offered.

• If you mark Course skills information, the program copies the Skills tab of grading information on course records for the academic year to the same course records for the new academic year. Information does not copy to courses marked as no longer offered.

• If you mark Course restrictions, the program copies the restrictions on course records for the academic year to the same course records for the new academic year. Information does not copy to courses marked as no longer offered.

• If you mark Faculty/staff restrictions, the program copies the restrictions on faculty/staff records for the academic year to the same course records for the new academic year. Information copies only to teachers marked as current teachers.

• If you mark Room restrictions, the program copies the restrictions on room records for the academic year to the same room records for the new academic year. Information does not copy to rooms marked as inactive.

• If you mark Course billing, the program copies information from the Billing tab of course records. The registrar’s office should coordinate with the billing office about this option since the billing office uses this information.

8. To begin copying, click Copy Now.

9. The new academic year record appears. Review and edit the academic year record as necessary.

10. To save the academic year record and return to the Academic Years page, click Save and Close.

Copying a session

To save time when setting up similar session records, you can copy sessions. The program automatically copies marking column association, timetable association, days in session, and pattern association. You designate whether the program should copy term information. The sessions grid appears only if you have Registrar’s Office installed.

1. On the academic year record, select the General tab. The sessions grid is at the bottom of the screen.
2. To select a session to copy, click **Copy from** on the action bar. The Copy Session screen appears.

![Copy Session](image)

3. In the **School** field, select the school with the session to copy.
4. In the **Academic Year** field, select the academic year with the session to copy.
5. In the **Session** field, select the session to copy.

**Note:** The program does not copy the dates of the terms or the setting for tracking schedule changes.

6. To copy the Terms tab, mark **Include terms**.
7. To copy, click **OK**.
8. The new session record appears. Review and edit the session record as necessary, such as entering dates for the terms and specifying whether to track changes.
9. To save the session and return to the academic year record, click **Save and Close**.

**Events**

On the Events page in *Configuration*, you manage records for events such as sporting events and holidays.

**Warning:** If you have *Registrar’s Office*, consult with the users of *Registrar’s Office* before adding events through *Admissions Office*.

If you have *Registrar’s Office*, events are shared between *Admissions Office* and *Registrar’s Office*. In *Registrar’s Office*, events can generate scheduling calendar entries for sessions. If you are setting up events in *Admissions Office*, it is important to consult with the users in *Registrar’s Office* so they can reflect the events in the scheduling calendar. Consider entering events through *Registrar’s Office* only.

There are several ways to access the School Calendar from which you can view events and add new events.

**Event Records**

You can define both one-time and recurring events. You can also make an event specific to one or more schools.
Adding an event from the Events page

1. From the Configuration page, click Events. The Events page appears.


3. In the Event ID field, enter the name of the event.
4. In the Description field, enter a description of the event.
5. If your organization has more than one active school record, the School box appears. In the School box, mark the schools to associate with the event.

Note: Events can occur at any time and do not need to occur within an academic year.

6. In the Start date field, enter the date the event begins.
7. In the End date field, enter the date the event ends.
8. In the Start time field, enter the time the event begins. In the End time field, enter the time the event ends.
   Or, for an all-day event, leave the Start time and End time fields blank.

Note: You can click the Category field label to access the Event Category table.

9. In the Category field, select or enter a category for the event. If you enter a new category, a message appears asking if you want to add it to the Event Category table.
10. In the Location field, you can select a room. To search for a room, click the binoculars to access the Open screen. From the Open screen, you can select a room record or add a room record.
11. In the **Comments** field, you can enter comments about the event.

12. To save the event record and return to the Events page, click **Save and Close**.

- Adding a recurrence to an event
  You can set up an event to recur at specific intervals. For example, you can create a recurring event for a monthly department meeting.
  1. From the Configuration page, click **Events**. The Events page appears.
2. In the events grid, select the event for which to add a recurrence and click **Open** on the action bar. The event record appears.

3. On the toolbar, click the **Recurrence** button. The Recurrence screen appears.

4. In the **Event Time** frame, enter the time range of the event in the **Start time** and **End time** fields. Or, for an all-day event, leave the **Start time** and **End time** fields blank.

5. In the **Duration** field, enter the number of days the event spans. Enter duration in calendar days. For example, for a two-day event occurring on a Friday and the following Monday, you could either create an event record with a duration of four days or create two event records, one for Friday and one for Monday.

6. In the **Recurrence Pattern** frame, in the **Frequency** field, select “Annually”, “Monthly”, “Semi-monthly”, “Weekly”, or “Daily”.

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**Note:** If you also have **Registrar’s Office**, an additional frame appears on the Recurrence screen for generating scheduling calendar entries.
7. Fields appear based on the frequency you select.
   - If you select “Annually”, select a specific date or day of the week. For example, you can set the pattern to February 15 or to the second Tuesday of February.
   - If you select “Monthly”, enter the month interval and a specific date or day of the week. For example, you can set the pattern to every 2 months on day 15 or every 2 months on the second Wednesday.
   - If you select “Semi-monthly”, enter the month interval and two specific dates in a month.
   - If you select “Weekly”, enter the week interval and the days of the week.
   - If you select “Daily”, enter the day interval.

8. In the Range of Recurrence frame, enter the start date for the recurrence in the Start date field.

9. In the ending field, select “End by”, “End after”, or “No end date”.
   - If you select “End by”, a field appears so you can enter an ending date. The program can create recurring events up until the date you enter.
   - If you select “End after”, a field appears so you can enter the number of occurrences of the event.

**Note:** Scheduling calendar entries are created only within defined terms of sessions of academic years.

10. If you have Registrar’s Office, the Generate Scheduling Calendar Entries frame appears. In the When creating a new instance of the events field, select how the event should affect the scheduling calendar:
   - If the event should not affect the scheduling calendar, select “Do not generate entries”.
   - If the date or dates of the event should be marked as not in session on the scheduling calendar, select “Generate entries to mark school not in session”.

**Note:** If you skip a cycle day, the next date school is in session starts with the cycle day of the first date you skip. For example, you have A, B, C, D, and E days and set up an event on A and B days. If you skip cycle days for this event, the program resets the next date to an A day and updates the sequence. If you do not skip cycle days for this event, the next day stays a C day.
   - To mark the date or dates of the event as not in session and to skip the cycle day, select “Generate entries to mark school not in session and skip cycle day”.

11. To save the recurrence and return to the event record, click OK.

12. The Recurrence field appears on the event record, instead of the date and time range fields.
13. To save the event record and return to the Events page, click **Save and Close**.

- **Removing a recurrence from an event**

  You can remove a recurrence from an event record. This removes future occurrences of the events, not the events that have already occurred. If you remove a recurrence, any events that have previously occurred become separate event records in the list on the Events page, distinguished with numeric designations, such as Thanksgiving-1, Thanksgiving-2, and so on.

  1. From the Configuration page, click **Events**. The Events page appears.
2. In the events grid, select the event for which you want to delete a recurrence and click **Open** on the action bar. The event record appears.

3. On the toolbar, click the **Recurrence** button. The Recurrence screen appears.

4. Click **Remove Recurrence**. The program removes the recurrence and you return to the event record. Edit the event record as necessary.

5. To save the event record and return to the Events page, click **Save and Close**.
Printing a list of events

1. From the Configuration page, click Events. The Events page appears.

2. On the Events page, display only the events in the grid that you want to print in the list. You can make selections in the School, Academic year, and Category fields to filter the events appearing the grid.

3. Right-click the grid and select Print. The Print Grid Options screen appears.

4. You can set formatting options on the General tab, including adding a header and footer, selecting the paper orientation, whether to include row and column grid lines and grid color settings, whether to number pages, and whether to size columns to fit the printed page.
5. To view how the formatting appears, select the Sample Output tab.

6. When you are ready to print, click Print.

School Calendar

Note: If you also have Registrar’s Office, cycle days, days of the term, and days not in session also appear on the school calendar and you can open the scheduling calendar from the school calendar.

The School Calendar displays events. If you access the calendar from the shell, it is named the School Calendar. If you access the calendar from a record, it is named the Event Calendar.

Accessing the School Calendar

You can access the School Calendar in several ways. To open the calendar to the current date and view events in all schools, select View, School Calendar from the shell menu bar.
To open the calendar to the date of a specific event, open the calendar from the event’s record. Select Event, Calendar from the menu bar or click the calendar on the toolbar.

Parts of the School Calendar

Note: The action bar appears only if you access the calendar from a record, not from the shell.
Five sections comprise the School Calendar.

1: Action Bar
The first section is an action bar, and appears only if you access the calendar from a record, not from the shell menu. The action bar contains New Event, Open, Print Calendar, and Go to Today buttons.
- To add a new event record, click New Event.
- To open an event record, select the event on the calendar and click Open.
- To print the school calendar currently appearing, click Print Calendar.
- To go to the current date on calendar, click Go to Today.

2: Calendar Grid
The calendar grid is the focal point of the school calendar. In the calendar bar above the grid, you can select the schools and dates to appear on the grid.
Select the school to appear in the grid or select “<All Schools>”. This field appears only if your organization has multiple schools, if not, just the school name appears.
Select the month and year to appear, or use the scroll buttons to move between months of the year.

You can also set color options for the school calendar, including the color of a cell containing an event. For more information about setting options, see the Options chapter of the Program Basics Guide.

3: Event List

In the third section, below the school calendar, you can view the month’s events in a list view with more details. You cannot edit these rows, but you can double-click a row to open the event record.

4: Previous and Next Miniature Calendars

The fourth section, at the top right, houses the Previous and Next miniature calendars. These two calendars display the month before and the month after the current month appearing on the school calendar. You can click a month to open the month in the main calendar grid.

5: Filters

Note: If you also have Registrar's Office, additional filters appear for cycle days, days of the term, and days not in session.

The fifth section, underneath the miniature calendars, contains a filter for events. You can check or uncheck these filter to control whether events appear in the calendar grid.

Tracks

On the Tracks page in Configuration, you define groups of items and actions that can be automatically added to records to automate the admissions process.

Consider a track a process made up of steps. Define checklist items for each step in the process. For example, because the inquiry process includes steps for sending an information packet, receiving an application, and receiving an application fee, define an Inquiry track with checklist items for Send Information Packet, Application Form Received, and Application Fee Received.

You can designate when to add a track to an applicant record and when to add each checklist item within the track. You can set up a track to automatically update an applicant’s status information and add another track upon completion of the track. You can also associate actions with each checklist item and track, for example, you can add an action for a decision meeting to a checklist item for a completed interview.
If you edit a track in Configuration after it is added to an applicant record, the changes are not made on that applicant’s record. Tracks are defaults only. Be aware that changing tracks to add to new applicant records can invalidate your processes because the program does not update the track on existing records. We recommend you review and plan tracks completely at the beginning of each admissions season.

You can save time when setting up tracks by copying an existing track and editing and renaming it. When you no longer need a track, you can mark it as inactive.

You can add checklist items and tracks to applicant records when running a wizard in the Status Wizard. You can also globally add checklist items and tracks. For more information about the Status Wizard and global add, see the Administration Guide for Blackbaud Student Information System.

**Status Progression**

**Warning:** Determine the applicant statuses you need in the admissions process before defining tracks.

Before setting up tracks, it is important to consider the statuses you plan to assign applicants. Confer with your organization’s key users and write down all steps an applicant must complete in the admissions process. Determine each applicant status, the order of the statuses, and the tasks involved in reaching each status. Examples of statuses include Inquiry, Applied, Accepted, Denied, Declined, Waitlisted, and Enrolled.

Add the statuses to the Applicant Status table on the Tables page. (If you also have Registrar’s Office, the table appears as the Student/Applicant Status table.) For more information about adding table entries, see “Adding a table entry” on page 68.
After you determine the status progression, you can create a track focused on reaching each status and create checklist items for the tasks required to reach the status. We provide this sample track progression to help you think of ways you can use tracks.

**Inquiry Track.** Set up an Inquiry Track to automatically add to applicant records with a status of “Inquiry”. Include checklist items for:
- Send information packet
- Application form received
- Application fee received

Upon completion, set up the track to automatically add the Applicant Track to the applicant’s record and change the applicant status to “Applied”.

**Applicant Track.** Include checklist items for:
- Essay received
- Official transcript received
- Test scores received
- Interview scheduled
- Interview completed
Associate an action with the “Interview completed” checklist item to set up a decision meeting. After the decision meeting, update each applicant’s status to “Accepted”, “Denied”, or “Waitlisted”.

**Denied Track.** Set up a Denied Track to automatically add to applicant records when the applicant’s status is changed to “Denied”.

Include checklist items for:
- Denied letter sent
- Application filed in records

**Waitlisted Track.** Set up a Waitlisted Track to automatically add to applicant records when the applicant’s status is changed to “Waitlisted”.

Include checklist items for:
- Waitlisted letter sent
- Waitlisted decision

Associate an action with the “Waitlisted decision” checklist item to set up a decision meeting to accept or deny waitlisted applicants. After the decision meeting, update each waitlisted applicant’s status to “Accepted” or “Denied”.

**Accepted Track.** Set up an Accepted Track to automatically add to applicant records when the applicant’s status is changed to “Accepted”.

Include checklist items for:
- Contract sent
- Contract received
- Medical forms sent
- Medical forms received
- Tuition deposit received

Upon completion, set up the track to automatically add the Enrolled Track to the applicant’s record and change the applicant status to “Enrolled”.

**Enrolled Track.** Include checklist items for:
- Welcome letter sent to students
- Placement test scheduled
- Placement test taken
- Assigned a peer mentor
- Activities fee received
- Books and supplies fee received

Upon completion, set up the track to automatically change the applicant status to “New Student”.

### Managing Tracks

From the Tracks page in *Configuration*, you can add and copy tracks. When you no longer need a track, you can mark it as inactive.
Adding a track

1. From the Configuration page, click **Tracks**. The Tracks page appears.

2. On the action bar, click **New Track**. The New Track screen appears, open to the Pre-Conditions tab.

3. In the **Track ID** field, enter a short description of the track.
4. In the **Description** field, enter a description of the track.
5. In the **School** field, select the school to associate with the track.

**Note:** Applicant statuses are defined on the Tables page in **Configuration**.
6. To have the track automatically added to an applicant record based on an applicant status, mark **Automatically add this track when applicant status is changed to** and select the applicant status that must be selected on the record for the program to add this track.

**Note:** Application types are defined on the Tables page in *Configuration*.

7. To have the track automatically added to an applicant record based on an application type, mark **Automatically add this track when application type is set to** and select the application type that must be selected on the record for the program to add this track.

8. In the **When this track is added to the applicant's record** frame, you can designate an action to add along with the track. To add an action, mark **Add an action**.

9. In the **Description** field, enter a description of the action.

**Note:** You can click the **Action Type** field label to access the **Action Type** table.

10. In the **Action type** field, select or enter the type of action. If you enter a new action type, a message appears asking if you want to add it to the **Action Type** table.

11. In the **Action date** field, select “Specific date” or “Track added date”. If you select “Specific date”, enter the date.

12. In the **Assigned to** field, select the user to assign the action to. You can click the binoculars to search for and select a user.

   In the **Assigned to type** field, the type of user appears.

13. To set an action reminder, mark **Set reminder for [ ] [ ] beforehand** and specify the length of time.

14. In the **Send reminder to** field, select the user to whom to send the reminder.

15. To send an action letter, mark **Send a letter** and select the letter.
16. To add checklist items to the track, select the Checklist tab.

17. To add a checklist item, click **New Checklist Item** on the action bar. For more information about adding checklist items, see “Adding a checklist item to a track” on page 38.

18. Select the Post-Conditions tab.

19. In the **This track is complete when** field, designate when the program should consider the track complete. Select “All checklist items are complete” or “The last checklist item is complete”.

20. In the **Upon completion of this track** frame, you can select to add another track, change the applicant’s status, and add an action. To add another track to the applicant’s record, mark **Add another track to the applicant’s record** and select the new track in the **Track ID** field.

21. To change the applicant’s status, mark **Change applicant status**.
22. In the **Change status to** field, select the new status.

23. In the **Date** field, select “Date completed” to enter the track completion date as the status date or leave it blank to enter a different date on the record later.

24. In the **Reason** field, enter the reason for the status change.

25. To add an action, mark **Add an action**.

26. In the **Description** field, enter a description of the action.

**Note:** You can click the **Action type** field label to access the **Action Type** table.

27. In the **Action type** field, select or enter the type of action. If you enter a new action type, a message appears asking if you want to add it to the **Action Type** table.

28. In the **Action date** field, select “Specific date” or “Track completed date”. If you select “Specific date”, enter the date.

29. In the **Assigned to** field, select the user to assign the action to. You can click the binoculars to search for and select a user.

   In the **Assigned to type** field, the type of user appears.

30. To set an action reminder, mark **Set reminder for [ ] [ ] beforehand** and specify the length of time.

31. In the **Send reminder to** field, select the user to whom to send the reminder.

32. To send an action letter, mark **Send a letter** and select the letter.

33. To save the track and return to the Tracks page, click **Save and Close**.
Adding a checklist item to a track

You add checklist items from the Checklist tab of a track record.


2. In the Checklist item field, select or enter a name for the checklist item. If you enter a new checklist item, a message appears asking if you want to add it to the Checklist Item table.

3. In the Comments field, you can enter comments about the checklist item.

4. On the Item Rules tab, you can establish rules for the checklist item. In the Add this item when field, you can set a rule for when the item is added. Select either “The previous item is marked as complete” or “The previous item is added to the applicant’s record”. If you are adding the first checklist item in a track, this field is disabled.

5. In the Date requested field, you can enter a date to automatically enter for the checklist item when added to an applicant record.
   - If you leave the field blank, no date for the item is entered.
   - If you select “<Specific date>”, a field appears for you to enter the date.
   - If you select “<Item added date>”, the date the item is added to the record is used.
   - If you select “<Calculated date based on completion of previous item>”, fields appear for you specify the interval to use in number of days, weeks, or months.
   - If you select “<Calculated date based on date added to applicant’s record>”, fields appear for you specify the interval to use in number of days, weeks, or months.

6. To permit waiving the checklist item, mark Completion of this item can be waived.
7. To designate that a payment is due for the item, mark **This item requires a payment** and enter the payment amount in the **Amount due** field.

8. Select the Actions tab. On the Actions tab, you can set up an action to add when the program adds the checklist item.

9. To add an action associated with the checklist item, mark **Add an action**.

10. In the **Description** field, enter a description of the action.

**Note:** You can click the **Action type** field label to access the table.

11. In the **Action type** field, select or enter the type of action. If you enter a new action type, a message appears asking if you want to add it to the **Action type** table.

12. In the **Action date** field, select “Specific date”, “Item date requested”, or “Item added date”. If you select “Specific date”, enter the date.

13. In the **Assigned to** field, select the user to assign the action to. You can click the binoculars to search for and select a user.

   In the **Assigned to type** field, the type of user appears.

14. To set an action reminder, mark **Set reminder for [ ] [ ] beforehand** and specify the length of time.

15. In the **Send reminder to** field, select the user to whom to send the reminder.
16. To send an action letter, mark **Send a letter** and select the letter.

![Checklist Item Image](image1)

17. To save the checklist item and return to the track record, click **Save and Close**.

- **Copying a track**
  To save time when setting up similar track records, you can copy one track record, edit it, and then save it with a new name.
  
  1. From the Configuration page, click **Tracks**. The Tracks page appears.

![Configuration Tracks Image](image2)
2. To copy a track record, select the track and click **Copy from** on the action bar. A new track record appears containing the same information as the selected track record.

3. Make the necessary changes to the track record.

4. To save the track record and return to the Tracks page, click **Save and Close**.

- **Making a track inactive**
  You cannot delete a track if it is associated with a record. However, if you no longer need a track, you can mark it as inactive. You cannot add inactive tracks to applicant records. Marking a track inactive does not affect the existing track or its actions and checklist items on records.

  **Note:** To view tracks associated with inactive schools, mark **Show tracks associated with inactive schools** below the grid.
1. From the Configuration page, click **Tracks**. The Tracks page appears.

2. Select the track to make inactive and click **Open** on the action bar. The track record appears.

3. Mark **Inactive** beside the **Description** field.

4. To save the track and return to the Tracks page, click **Save and Close**.
Promotion Schedules

On the Promotion Schedules page in *Configuration*, you define how applicants progress through grade levels at their current schools. You define grade levels in the **Grade Level** table on the Tables page. You must define grade levels in ascending order, such as from Ninth Grade to Twelfth Grade. For more information about tables, see “Tables” on page 65.

**Note:** If you have only one active school, you can define only one promotion schedule.

When defining a promotion schedule, you can designate grade levels to manage grade promotions from other school systems. For example, you can define the grade levels a prospective applicant would progress through in high school or college. For high school recruits, you would define ninth grade through twelfth grade, and then for college-level applicants (such as transfer students), freshman through senior. When you run the update applications wizard, the applicant’s current grade is updated according to the progression you defined in the promotion schedule or you can change it manually.

- **Adding a promotion schedule**

  Before you create a promotion schedule, you must add **Grade Level** table entries for the grade levels of applicants applying to your school. You create table entries on the Tables page in *Configuration*. For more information about table entries, see “Tables” on page 65.

  **Note:** An empty Standard promotion schedule appears by default. You can edit this to use as your promotion schedule or delete it.

  1. From the Configuration page, click **Promotion Schedule**. The Promotion Schedules page appears.
2. On the action bar, click **New Promotion Schedule**. The New Promotion Schedule screen appears.

3. If you have multiple schools, in the **For school** field, select the school to associate with the promotion schedule.

4. In the **Name** field, enter a name for the promotion schedule.

5. In the **Description** field, enter a description for the promotion schedule.

**Note:** **Graduates go to [ ] in grade level [ ]** does not appear if you have only one school.

6. If you have multiple schools, you can mark **Graduates go to [ ] in grade level [ ]** to designate that a graduate of this school goes to another school next. Select the school and grade level to which to promote the student.

   To designate that graduates of this school are no longer enrolled, do not mark **Graduates go to [ ] in grade level [ ].**

7. The grade levels and grade level descriptions appear from the **Grade Level** table in **Configuration** appear in the grid. You cannot edit these columns.

8. In the **Graduate** column, mark the checkbox for the grade from which an applicant graduates out of the school. For example, for high school grade levels, mark the checkbox for twelfth grade.

9. For each grade level in the school, select the next grade level that applicants go to in the **Next Grade Level** column. The next grade level's description appears in the **Description** column.

   For example, for high school grade levels, promote ninth grade to tenth grade, tenth grade to eleventh grade, and eleventh grade to twelfth grade.

**Note:** To view promotion schedules associated with inactive schools, mark **Show promotion schedules for inactive schools** below the grid.

10. To save the promotion schedule and return to the Promotion Schedules page, click **OK**.

   ▶ **Copying a promotion schedule**

   To save time when setting up similar promotion schedules, you can copy one promotion schedule, edit it, and then save it with a new name.

   **Note:** If you have only one active school, you can define only one promotion schedule.
1. From the Configuration page, click **Promotion Schedules**. The Promotion Schedules page appears.

2. To copy a promotion schedule, select the promotion schedule in the grid and click **Copy from** on the action bar. The New Promotion Schedule screen appears containing the same information as the selected promotion schedule, except for the name.

3. Enter a new promotion schedule name and make any other changes.

4. To save the promotion schedule and return to the Promotion Schedules page, click **Save and Close**.

**Addressee/Salutations**

**Note:** If you also have **Registrar’s Office**, addressee/salutation formats are shared between **Admissions Office** and **Registrar’s Office**.

On the Addressee/Salutations page in **Configuration**, you can define addressee and salutation formats. An addressee is how a name appears on labels, cards, envelopes, letters, and reports. A salutation is how you greet a person in letters and other mailings. For example, you can create a format for a couple’s nicknames such as “Bill and Meg” and a format with titles, first name, and last name such as “Mr. and Mrs. William Smith”. By configuring addressee and salutation formats, you help ensure that addressees and salutations appear consistently on mailings.
In an addressee/salutation format, you include fields from records in the program, such as titles, names, social security number, and grade level. You can also define custom fields to use in an addressee/salutation format. Addresses/salutation formats can be edited at any time. However, you cannot delete a format if it appears on a record.

- **Adding an addressee/salutation format**
  1. From the Configuration page, click **Addressee/Salutations**. The Addressee/Salutations page appears.
  2. To add a new addressee/salutation format, click **New Salutation** on the action bar. The New Salutation screen appears.
  3. In the **Field Name** field, select the specific field to include in the format. For example, if you want the person’s first name as part of the salutation, select “First name”.
  4. In the **Initial**, **Comma**, **Cond**, **Hard Brk**, **Concat**, and **Smart** columns, mark the formatting styles you want.
• **Initial.** When you mark this checkbox, the program reduces the field entry to a single initial and inserts a period.

• **Comma.** When you mark this checkbox, the program inserts a comma before the field entry.

• **Cond (Conditional Break).** When you mark this checkbox, the addressee/salutation wraps to the next line at the point where the conditional break is placed if the addressee/salutation is too long. For example, a salutation may not fit on certain sizes of address labels.

  For example, for the format “Mr. William H. Smith and Mrs. Margaret A. Adams”, you can enter a conditional break for the spouse title so if “Mr. William H. Smith and Mrs. Margaret A. Adams” cannot fit on one line, the program breaks the format to have “Mr. William H. Smith and” on one line and “Mrs. Margaret A. Adams” on the next line.

• **Hard Brk (Hard Break).** When you mark this checkbox, the addressee/salutation automatically wraps to the next line at the point where the hard break is placed.

  For example, for the format “Mr. William H. Smith Mrs. Margaret A. Adams”, you can enter a hard break for the spouse title so “Mr. William H. Smith” appears on the first line and “Mrs. Margaret A. Adams” appears on the next line.

• **Concat (Concatenate).** When you mark this checkbox, the program removes the spaces between the current field and the subsequent field.

  For example, for the format “Mrs. Margaret Adams-Smith”, you can mark Concat for the spouse last name (Adams) and the hyphen.

• **Smart.** When you mark this checkbox, the program removes a user-defined field if the fields with the smart option are activated. For example, if you are working with an addressee/salutation format of “John and Jane Q. Smith” and you select the smart option by the spouse first name field, the program drops the “and” if there is not an entry in the spouse first name field. This prevents salutations of “John and Q. Smith”.

5. Verify the addressee/salutation appears correctly in the Preview pane.

6. To save the format and return to the Addressee/Salutations page, click Save and Close. The format appears on the Addressee/Salutations page.
Adding an addressee/salutation field

You can create your own addressee/salutation fields to use in addressee/salutation formats.

1. From the Configuration page, click **Addressee/Salutations**. The Addressee/Salutations page appears.

2. To add a new field to use in an addressee/salutation format, click **Add/Edit Fields**. The Addressees/Salutation Fields screen appears.

3. In the **Field Names** column, enter the additional fields you want to appear in the **Field Name** column of an addressee/salutation format.

4. To save the fields and return to the Addressees/Salutations page, click **OK**.

Attributes

**Note**: If you also have **Registrar’s Office**, attributes are shared between **Admissions Office** and **Registrar’s Office**.

On the Attributes page in **Configuration**, you can define attributes for specialized information you want to track but for which no field exists. For example, you can create a Parent is Alum attribute for applicant records, a CPR Certification attribute for faculty/staff records, and an Annual Tuition attribute for organization records. By assigning attributes to records, you have another way to group information for reporting purposes.
Glossary: An attribute is a reporting tool used to group information based on a common theme. With attributes defined, you can filter information to your specifications.

You define attributes per record type and designate how the value of the attribute is entered on records, including text, date, yes/no, number, currency, or table. When you create attribute tables, you can enter table entries from the Tables page of Configuration or directly from the Attributes tab of a record. You can require an attribute value on a record. You can designate that an attribute can be entered only once on a record.

The order you set in the attributes grid determines the order attributes appear on a record. You can place your most popular attributes at the top to save time scrolling through less used attributes during data entry. You can use the Up and Down buttons to rearrange the attributes on the Attributes page.

You can rename an attribute type, change the required setting, or change the unique setting at any time and the program updates the attribute on associated records. You cannot change the data type of an attribute after it exists on a record. To delete an attribute in Configuration, you must first delete it from all records.

From the Attributes page, you can print the attribute grid details for all record types in the current program. From the menu bar on the Attributes page, select File, Print, then select Attributes Report.

Adding an attribute

1. From the Configuration page, click Attributes. The Attributes page appears.

2. In the list on the left, select the record type for which to define an attribute. The attributes grid appears on the right.

3. In the Attribute Type column, enter a description of the attribute.

4. In the Data Type column, select “Text”, “Number”, “Date”, “Currency”, “Yes/No”, or “Table” as the format type for the field.

Note: You can enter attribute table entries on the Tables page of Configuration or on the Attributes tab of a record.

If you select “Table”, select an existing table name in the Table Name column or add a new table. To add a new table for the attribute, select “[Add New Table]”, which appears at the bottom of the list.

5. To make the attribute required on each record, mark Required?. This prevents saving a record without a value for the attribute.

6. To make the attribute unique for each record, mark Unique?. This means you can use the attribute only once on a record.

7. When you exit the attributes grid, your changes are saved automatically.

Letters

Note: Student exports are available if you have Registrar’s Office.
You can generate letters quickly from records, for example, generate an action letter to send to an applicant after an interview is scheduled. On the Letters page in Configuration, you can define the letter descriptions and associate letters with Word merge files. You can associate action letters with applicant, faculty/staff, individual, organization, or student exports. You associate applicant and checklist letters with applicant exports, faculty/staff letters with faculty/staff exports, financial aid letters with applicant or student exports, individual letters with individual exports, and organization letters with organization exports.

**Note:** On the File Locations tab in Options, you can specify a directory to store files created in Blackbaud Student Information System in a word processing format.

From the Letter menu on an applicant, faculty/staff, individual, or organization record, you can select a letter to use and also create a new letter format as you would here in Configuration. For more information about the Letter menu on records, see the Records Guide for Admissions Office.

You must add action, financial aid, and checklist letters through Configuration. You can select these letters on the corresponding tabs on records.

You can associate a letter with a simple or conditional Word merge file. For more information about simple and conditional Word merges, see the Export Guide for Blackbaud Student Information System.

You must have Word 2000 or Word XP installed on your computer to create Word merge files from Admissions Office.

- Adding a merge letter for a simple merge

**Note:** If you also have Registrar’s Office, letters are shared between Admissions Office and Registrar’s Office.

1. From the Configuration page, click Letters. The Letters page appears.
2. From the treeview on the left, select the type of letter to create.
4. In the **Letter description** field, enter a description for the letter. The letter description appears on the Letters page and when selecting letters on records.

**Note:** In the **Export format** field on the Open screen, select “Blackbaud Simple Word Merge”.

5. In the **Blackbaud Word Merge export** field, you can associate this letter with a *Word* merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

![Open screen](image)

6. If the export file does not exist already, click **Add a New Export** on the Open screen. The Create a New Export screen appears.

![Create a New Export](image)

7. In the **What type of export do you want to create?** box, select the type of export. The export types available depend upon the letter type.

**Note:** On the Export tab in Options, you can specify the export format that appears by default.

8. In the **Export format** field, select “Blackbaud Simple Word Merge”.

![Create New Export](image)
9. Click Create Now. The New Export screen appears for the type of export you are creating.

10. To select the merge fields to include in the letter, select fields from the Available Fields treeview. In the treeview, click the plus sign to the left of a category to view the fields in that category. To move a field to the Output box, double-click the field or highlight it and click Select.

11. When you are done selecting fields, click Edit word merge file. Word opens automatically to a blank document to use to create your letter.

12. Type the letter in Word. To insert a field from Blackbaud Student Information System, select Insert Blackbaud Student Information System field and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

13. When you have finished creating the letter, click Save and return to SIS to Merge. You return to the New Export screen.

14. Click Save and Close. The Save Export As screen appears.

15. Enter a name and description of the export and click Save. You return to the New Letter screen.

Note: Any criteria you select for a field does not apply to the letter you are generating, keep in mind you are just selecting the merge fields to include on the letter.
16. To save and close the New Letter screen, click OK.

- Adding a merge letter for a conditional merge
  1. From the Configuration page, click Letters. The Letters page appears.
  2. From the treeview on the left, select the type of letter to create.
  4. In the Letter description field, enter a description for the letter. The letter description appears on the Letters page and when selecting letters on records.

Note: In the Export format field on the Open screen, select “Blackbaud Conditional Word Merge”.

5. In the Blackbaud Word Merge export field, you can associate this letter with a Word merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

6. If the export file does not exist, you can click Add a New Export on the Open screen. The Create a New Export screen appears.

7. In the What type of export do you want to create? box, select the type of export. The export types available depend upon the letter type.

**Note:** On the Export tab in Options, you can specify the export format that appears by default.

8. In the Export format field, select “Blackbaud Conditional Word Merge”.
9. Click **Create Now**. The New Export screen appears for the type of export you are creating.

![New Export Screen]

**Note:** Any criteria you select for a field does not apply to the letter you are generating, keep in mind you are just selecting the merge fields to include on the letter.

10. To select the merge fields to include in the letter, select fields from the **Available Fields** treeview. In the treeview, click the plus sign to the left of a category to view the fields in that category. To move a field to the **Output** box, double-click the field or highlight it and click **Select**.
11. When you are done selecting fields, click **Conditional merge wizard**. The Blackbaud Conditional Word Merge Wizard screen appears.

12. Select a field to use as a condition. Click **Next**.

14. Based on the field you selected, select the condition and value for the letter. For example, if you are using Current status as the field, select “equal to” in the **Condition** field and “Accepted - Not Enrolled” in the **this value** field.

15. Click **Edit merge document**. **Word** opens automatically to a blank document to use to create your letter.

16. Type the letter in **Word**. To insert a field from **Blackbaud Student Information System**, select **Insert Blackbaud Student Information System field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

17. When you have finished creating the letter, click **Save and return to SIS to Merge**. You return to the Conditional Merge Document screen.

18. In the **Document description** field, enter a description of the document.

19. Click **OK**.

20. To select more conditions, click **Back** and repeat steps 12-19.

21. When you are done selecting conditions, click **Finish**. You return to the New Export screen.

22. Click **Save and Close**. The Save Export As screen appears.

23. Enter a name and description of the export and click **Save**. You return to the New Letter screen.

24. To save and close the New Letter screen, click **OK**.
International Addresses

**Note:** If you also have Registrar’s Office, international addresses are shared between Admissions Office and Registrar’s Office.

On the International page in Configuration, you can format information for contacts in other countries and include specific address block formatting information. When adding a new address format, you must select one of the five supported formats on which to base your new address: United States, United Kingdom, Canada, Australia, or New Zealand.

You should define the country records you need before entering addresses for the country. You cannot delete a country record after it exists on an address record.

- **Adding a country**
  1. From the Configuration page, click International. The International page appears.
  3. In the Name field, enter the name of the new country.
  4. In the Abbreviation field, enter an abbreviation for the country. This entry can be used in the address block.
  5. In Format address for this country like [ ] addresses, select a format for the address. For example, if you select “United States”, the address format for the new country defaults to the U.S. Postal Standard.
  6. To automatically mark the Synchronize with individual address fields checkbox on addresses created for the country, mark the By default, Synchronize individual address fields with <Address as it will be printed> checkbox. Marking the Synchronize with individual address fields checkbox prevents the address block from being edited and you can update the address box by editing the individual address fields.
To not automatically mark the **Synchronize with individual address fields** checkbox on addresses created for the country, do not mark the **By default, Synchronize individual address fields with <Address as it will be printed>** checkbox. Not marking the **Synchronize with individual address fields** checkbox means you must manually enter the address as you want it printed.

7. To automatically include the country in the address block, mark **Include country in <Address as it will be printed> using**. Then, select “Country name” to include the entire name of the country or “Abbreviation” to include only the abbreviation.

You must mark **Synchronize with individual address fields** on the address record for the country to be automatically included in the address block.

8. To save the new country and return to the International page, click **Save and Close**.

**Business Rules**

**Glossary:** A business rule is a system-wide preference. Use business rules to customize standard procedures and requirements that affect all users.

On the Business Rules page in **Configuration**, you set business rules that affect all users and customize standard procedures and requirements for your organization. Because some business rules can make fundamental changes to how **Admissions Office** works, we recommend that the system administrator define business rules only after careful consideration.

**General Business Rules**

**Note:** If you also have **Registrar’s Office**, business rules are shared between **Admissions Office** and **Registrar’s Office**.

With General business rules, you set rules for applicant IDs, the format of the years in **Class of** fields, whether to show marital status and maiden name fields for applicants, and the default font and font size of note text.

**Note:** If you also have **Registrar’s Office**, additional fields appear for student records.

**Automatically generate applicant IDs starting with.** Mark this checkbox so **Admissions Office** automatically generates new applicant ID numbers when you add applicants to the database. You also designate the first number to use when creating applicant ID numbers. If you have **Registrar’s Office**, this business rule also applies to student IDs.
**Applicant IDs are [ ] characters long.** If you automatically generate IDs, designate the number of characters to use when creating new applicant ID numbers. If you have *Registrar’s Office*, this business rule also applies to student IDs.

**Prefix applicant ID with.** You can enter a prefix of up to five characters to add to each new applicant ID.

**Prevent data entry to the applicant ID field.** Mark this checkbox to prevent the applicant ID field from being edited on records. This business rule prevents missing and duplicate IDs.

**Display Marital Status and Maiden Name fields for Applicants.** Mark this checkbox to include *Marital Status* and *Maiden Name* fields on applicant records. If you have *Registrar’s Office*, this business rule also applies to student records.

**Display class of using.** Select whether to use the full-year format (“YYYY”) or only the last two digits of the year (“YY”) in *Class of* fields.

**When creating a new note, use.** Select the default font and font size to use in note text. Changing the font and font size in this business rule does not affect existing notes.

### Applicant Business Rules

With Applicant business rules, you set rules for applicant ages, status date updates, and duplicate applicant records.

**Base applicant age on.** Select how the program determines each applicant’s age based on birth dates. You can select System Date, Academic Year, or Specific Date. If you select Specific Date, a date field appears for you to enter the date.

- If you select System Date, the program calculates a precise age based on the current date.
- If you select Academic Year, the program calculates age based on the first date of an academic year. For example, you may use this setting for reporting on applicant ages for the next academic year.
- If you select Specific Date, the program calculates age based on a date you enter. For example, you may use this setting for checking applicant ages as of a certain date for cutoff requirements, such as for certain types of financial assistance.
Update status date when updating current status. Mark this checkbox to automatically update the status date to the current date whenever you change the status on an applicant record.

Duplicate applicant criteria. In this grid, you can select specific applicant record fields to use as criteria when searching for duplicate records. The duplicate search is useful for preventing users from entering duplicate applicant records.

In the Field Name column, you can select fields to use in the duplicate search. In the Length column, enter the number of characters to check in each field during the duplicate search.

Automatically check for duplicate applicants. With this business rule, the program automatically searches for duplicate applicant records based on duplicate applicant criteria when you save a new applicant record. In the corresponding field, you can require the program to either disallow duplicate applicants or warn the user if duplicate applicants are found.

Faculty/Staff Business Rules

With Faculty/Staff business rules, you set rules for faculty/staff IDs and duplicate records.

 Automatically generate faculty/staff IDs starting with. Mark this checkbox so Admissions Office automatically generates new faculty/staff ID numbers when you add faculty/staff to the database. You also designate the first number to use when creating faculty/staff ID numbers.

Faculty/Staff IDs are [ ] characters long. If you automatically generate IDs, designate the number of characters to use when creating new faculty/staff ID numbers.

Prefix faculty/staff ID with. You can enter a prefix of up to five characters to add to each new faculty/staff ID.

Prevent data entry to the faculty/staff ID field. Mark this checkbox to prevent the faculty/staff ID field from being edited on records. This business rule prevents missing and duplicate IDs.

Duplicate faculty criteria. In this grid, you can select specific faculty/staff record fields to use as criteria when searching for duplicate records. The duplicate search is useful for preventing users from entering duplicate faculty/staff records.
In the **Field Name** column, you can select fields to use in the duplicate search. In the **Length** column, enter the number of characters to check in each field during the duplicate search.

**Automatically check for duplicate faculty/staff.** With this business rule, the program automatically searches for duplicate faculty/staff records based on duplicate faculty/staff criteria when you save a new faculty/staff record. In the corresponding field, you can require the program to either disallow duplicate faculty/staff members or warn the user if duplicate faculty/staff members are found.

### Individual Business Rules

With Individual business rules, you set rules for individual IDs and duplicate records.

**Automatically generate individual IDs starting with.** Mark this checkbox so **Admissions Office** automatically generates new individual ID numbers when you add individuals to the database. You also designate the first number to use when creating individual ID numbers.

**Individual IDs are [ ] characters long.** If you automatically generate IDs, designate the number of characters to use when creating new individual ID numbers.

**Prefix individual ID with.** You can enter a prefix of up to five characters to add to each new individual ID.

**Prevent data entry to the individual ID field.** Mark this checkbox to prevent the individual ID field from being edited on records. This business rule prevents missing and duplicate IDs.

**Duplicate individual criteria.** In this grid, you can select specific individual record fields to use as criteria when searching for duplicate records. The duplicate search is useful for preventing users from entering duplicate individual records.

In the **Field Name** column, you can select fields to use in the duplicate search. In the **Length** column, enter the number of characters to check in each field during the duplicate search.

**Automatically check for duplicate individuals.** With this business rule, the program automatically searches for duplicate individual records based on duplicate individual criteria when you save a new individual record. In the corresponding field, you can require the program to either disallow duplicate individuals or warn the user if duplicate individuals are found.
Organization Business Rules

With Organization business rules, you set rules for organization IDs and duplicate records.

Automatically generate organization IDs starting with. Mark this checkbox so Admissions Office automatically generates new organization ID numbers when you add organizations to the database. You also designate the first number to use when creating organization ID numbers.

Organization IDs are [ ] characters long. If you automatically generate IDs, designate the number of characters to use when creating new organization ID numbers.

Prefix organization ID with. You can enter a prefix of up to five characters to add to each new organization ID.

Prevent data entry to the organization ID field. Mark this checkbox to prevent the organization ID field from being edited on records. This business rule prevents missing and duplicate IDs.

Duplicate organization criteria. In this grid, you can select specific organization record fields to use as criteria when searching for duplicate records. The duplicate search is useful for preventing users from entering duplicate organization records.

In the Field Name column, you can select fields to use in the duplicate search. In the Length column, enter the number of characters to check in each field during the duplicate search.

Automatically check for duplicate organizations. With this business rule, the program automatically searches for duplicate organization records based on duplicate organization criteria when you save a new organization record. In the corresponding field, you can require the program to either disallow duplicate organizations or warn the user if duplicate organizations are found.

When creating business relationships, [ ] address information. When you add an organization as a business relationship to a record, this business rule determines whether an organization’s address is copied and shared between the two records. Your selection here is the default.
Letters Business Rules

When creating a letter from a record, you can select to save the letter as an action. With Letters business rules, you select the action types to associate with each type of letter. Action types are defined in the Action Type table. For more information about tables, see “Tables” on page 65.

Queue Business Rules

If you have the optional module Queue, you can set business rules for automatically adding recurring queues to the queue schedule and removing queues from the queue schedule.

Add recurring queues to the schedule list [ ] days BEFORE the scheduled start date. You can select the number of days before the scheduled start date to add recurring queues.

Remove queues from the schedule list [ ] days AFTER they have been processed. You can remove queues from the schedule after they have been processed.

When generating emails from queue, use [ ] to send emails. With this business rule, you can select the email format. Your choices include “MIME” and “UUEncode.” We recommend you use the MIME format because most email client programs support this format. Select “UUEncode” if you are having trouble with attachments, or if you communicate with a domain that continues to use UUEncode.

“From” address for Queue emails. With this business rule, you enter a correctly formatted email address from which the Queue emails will be sent. Please note, if you enter the “Mail from” address on the Miscellaneous tab of a Queue, the address you enter here will be overridden.

If you are on the Windows Server 2008 operating system and want to send scheduled Queue emails, this field is required.
Tables

Glossary: A table is a field in which you can pre-define entries to save time and promote consistent data entry.

In a table, you can create a standard list of entries for a field. Selecting a table entry in a field instead of manually entering information increases data entry speed and improves accuracy.

Some tables already contain predefined values, such as the State table. For others, you must define entries for your organization, such as the Applicant Status table. Some table entries require you to enter only a description, while other table entries require more detail. For example, the Phone Type table requires a type and a phone number format.

Although the Tables page in Configuration provides a central location for managing table entries, you can view, add, and edit table entries directly from table fields throughout the program:

• To view a list of table entries available to select for a field, you can click the down arrow on the right side of a field or press F4.
• To scroll through the entries, place the cursor in the field and click the down arrow on your keyboard.
• To access a screen on which you can view, add, edit, and delete table entries, you can click the field label or place the cursor in the field and press F7.
• If you enter text directly in a field and the program does not recognize it as a valid entry, you receive a message asking if you want to add the text as a new table entry.

Warning: To ensure consistency of data entry, restrict rights to tables to key users.

To keep entries consistent, it is extremely important that you limit rights to tables. Rights to code tables are controlled in security groups in Administration. Allowing only a few key users rights to code tables ensures the validity of your data.

Tables

Note: Certain tables are shared between all programs in Blackbaud Student Information System.

Most tables are program-defined, correlating to a field in the program. You can also define your own tables to use with attributes.

If table entries for a user-defined table do not exist on any records, you can delete the table. To delete a user-defined table, you must first delete the table entries from all records.

→ Adding a table

Note: A table you add can be used only as a table for an attribute.
1. From the Configuration page, click **Tables**. The Tables page appears.

2. At the bottom of the box on the left, click **Add new table**. The New Code Table screen appears.

3. In the **Table Name** field, enter a name.

4. To allow table entries in the table to have a short description, mark **Use Short Description of**. In the [ ] **characters** field, enter a number from one to six to designate the maximum number of characters to allow in the short description.

5. To save the table and return to the Tables page, click **OK**.
Printing a table

1. From the menu bar on the Tables page, select **File, Print**, then select **Code Tables Report**. The Code Table Report screen appears.

2. To print specific tables, mark **Include Selected Code Tables Only**. In the **Code tables** box, select the tables to print. Click the right arrow to move your selections to the **Code tables to include** box.

   To print all tables, unmark **Include Selected Code Tables Only**.

3. To include inactive table entries on the report, mark **Include inactive table entries**.

4. To include tables without table entries, mark **Include empty code tables**.

5. To print each table on a separate page, mark **Print one table per page**.

6. To preview the report, click **Preview**.

7. To print the report and return to the Tables page, click **Print**.

Table Entries

**Note:** We recommend you do not edit table entries while other users are working in the program.

For each table, you can add and rearrange table entries. If you edit a table entry, the program updates the entry on all records. You cannot delete a table entry that is in use, but you can make a table entry inactive.

The order of the table entries in the list determines the order the entries appear when you click the down arrow in the related field on a record. You can place your most popular entries at the top to save time scrolling through less used entries during data entry. You can use the **Up** and **Down** buttons to rearrange the entries on the Tables page.

**Warning:** You must rank your grade level table entries in ascending order.

Order is especially important for the **Grade Level** table. You must rank your grade levels in ascending order, such as from Freshman to Senior.
Adding a table entry

1. From the Configuration page, click **Tables**. The Tables page appears.

2. In the **Type** field above the box on the left, select the table types to appear in the box. To view all tables in the box, select "<All Tables>".

3. In the box on the left, select the table in which to add the new table entry. Existing table entries appear in a grid on the right.

4. To add a new table entry in the selected table, click **New Table Entry**. The New Table Entry screen appears.

5. In the **Description** field, enter a description for the new table entry.

6. Depending on the type of table entry you add, other fields may appear such as **Short Description** or **Phone Number Type**.

7. To save the new table entry and return to the Tables page, click **OK**.

8. To add a new table entry, click **New Table Entry** or press **ALT+N**.

**Note:** You can add a new table entry to a certain point in the table entry list. Select the entry above which to insert the new entry and click **Insert** on the action bar.
Sorting table entries

You can sort table entries in ascending or descending order. Tables with numbers are sorted by the first digit of the entry. For example, 2,000 would come before 40.00 (in ascending order). Therefore, we recommend that you avoid sorting currency tables or tables with dollar amounts, such as the Family Income table.

1. In the box on the left on the Tables page, select the table you want to sort. Table entries appear on the right.

2. Click Sort. The Sort Table Options screen appears.

3. To sort the table in ascending order alphabetically or numerically, in the Sort Order frame, mark Ascending. To sort the table in descending order, mark Descending.

   Note: Short descriptions do not appear on all tables.

4. To sort table entries by descriptions, in the Sort By frame, mark Description. To sort table entries by short descriptions, mark Short Description.

5. To sort your table entries and return to the Tables page, click OK.

Cleaning up table entries

Warning: Before editing table entries, make sure no other users are in the program.
To ensure consistent data entry and accurate queries and reports, we recommend limiting rights to tables to key users. Otherwise, you may have duplicate table entries within a table, for example, “Call”, “Phone Call”, and “Telephone Call” in the Action Type table. However, if you find duplicate table entries, you can use Table Cleanup to replace duplicate entries with one entry. Before editing table entries, make sure no other users are in the program.

1. On the Configuration page, click Tables. The Tables page appears.

2. In the box on the left, select the table to clean up. Existing table entries appear in a grid on the right.

3. On the action bar, click Table Cleanup. The Table Cleanup screen for the selected table appears. A list of areas in the program that can use the selected table appear in the box on the right.

4. In the <Table name> table entries to be replaced grid, select the table entries to replace. The program will replace these entries on all records on which they appear.

Note: If you add a new table entry in the Replace with field, a message appears asking if you want to add the new entry to the table. Click Yes to add the entry; click No not to add the entry.

5. To replace the selected entries, in the Replace with field, select a table entry.
6. To delete the entries you are replacing so they cannot be used again on records, mark **Delete table entries that are being replaced**.

7. To replace the entries, click **Replace Now**.

8. A message appears telling you that the table cleanup finished successfully. Click **OK**.

9. To return the Tables page, close the Table Cleanup screen.

- **Making a table entry inactive**

  **Note:** You may have to wait after selecting to delete a table entry while the program checks to see if the table entry is in use. We recommend you make the entry inactive instead.

You cannot delete a table entry used on a record in the program, but you can mark a table entry as inactive to remove it from the list of available entries. Marking a table entry inactive does not remove it from where it already exists on records in the program.

1. From the Configuration page, click **Tables**. The Tables page appears.

2. In the **Type** field above the box on the left, you can select what table types to appear in the box. To view all tables in the box, select “<All Tables>”.
3. In the box on the left, select the table containing the table entry you want to make inactive. Table entries appear in a grid on the right.
4. Select the table entry and click Open on the action bar. The Edit Table Entry screen appears.
5. Mark the Inactive checkbox.

![Edit Table Entry](image)

**Note:** On the bottom of the Tables page, you can mark Display active entries only to hide inactive table entries from your view in the list.

6. To save the change and return to the Tables page, click OK. The table entry is no longer available in the associated field in the program.

## Fields

**Warning:** A field is a data entry box in which you add and store information on records in your database. For example, *Year apply* is a field on an applicant record.

On the Fields page in Configuration, you can control field characteristics for most record types. You can rename some fields and change a field’s status from optional to required, ensuring the field must contain an entry before the record is saved. You can hide fields to prevent data entry to unused fields.

You can also view which fields are lookup fields containing table entries from which you can select. Selecting table entries in lookup fields helps standardize entries and increases the consistency and speed of data entry. You can make certain fields lookup fields. When you mark Lookup for the field, a message appears asking if you want to create a table for the field. For more information about tables, see “Tables” on page 65.

You can edit field characteristics at any time. However, certain cells may be locked and cannot be changed.

- **Setting field characteristics**

  **Note:** If you also have *Registrar’s Office*, field characteristics are shared between *Admissions Office* and *Registrar’s Office.*
1. From the Configuration page, click **Fields**. The Fields page appears.

![Fields page](image)

2. In the box on the left, select a record type.

**Note:** When you rename a field, the change affects all areas of the program. To ensure consistency and accuracy of reports, avoid using duplicate field names.

3. In the grid for the record type, field names appear in the **Field** column. To change the display name of a field, you can enter a new name in the **Display As** column on the same row.

4. To make a field required, mark the checkbox in the **Required** column. A required field must contain information before the record is saved.

5. To hide a field, mark the checkbox in the **Hidden** column. A hidden field may contain information but does not appear on a record. You can mark this checkbox to hide fields your organization does not use or no longer uses.

6. In the **Lookup** column, you can view which fields are lookups, which means that they are associated with a table and table entries.

7. When you exit the fields grid for a record type, your changes are saved automatically.

### Test Type Definitions

Many standardized tests have several subject areas that are scored separately. For example, the ACT Test scores students in English, Mathematics, Reading, and Science and includes a Composite Score. You can track these scores in **Blackbaud Student Information System**. On the Test Type Definitions page in **Configuration**, you can define the subject areas for each test type.
Define a test type

1. From the Configuration page, click **Test Type Definitions**. The Test Type Definitions page appears.

2. On the action bar, click **New Test Type Definition**. The New Test Type Definition screen appears.

3. From the **Test type** field, select or enter the standardized test whose subtests you want to define. For example select “SAT”.

4. In the **Subtests to Include** grid, select or enter a subtest that should be used to calculate a total score for the test type selected in step 3.

   We recommend that you do not add every subtest to a particular test type definition. Not every applicant record will have all applicable subtests. For example, the SAT has many subtests that do not determine an applicant’s final score. Also, not every applicant takes all SAT subtests. However, you can add subtests to the Test tab of the applicant record without associating it to a particular test type.

   **Note:** Inactive subtests that appear on an applicant record are still calculated in the total score. If an inactive subtest does not appear on an applicant record, it is not calculated in the total score.

5. In the **Determine best score using** field, select one of the following to determine how to calculate the best score for the selected test type.
• “single highest composite score” – The Blackbaud Student Information System adds every subtest for each date to determine the composite score. The date with the highest score is considered the best score. If a subtest has multiple entries on the same date, the system uses the highest subtest value to determine the composite score. For example, an applicant submits two sets of scores for Mathematics, Verbal, and Writing. The Blackbaud Student Information System would add the scores from both dates and the date with the highest score is determined to be the best composite score.

Subtests without a date or a score are not calculated in the composite score. For those subtests without a date, the message “Missing subtests for best score” appears where the subtests total value should be.

• “most recent composite score” – The system uses a group of subtests with the latest dates and totals them together to get the composite score. All the subtests must have the same date. If a subtest has multiple scores on the same date, the system uses the highest score to determine the composite score. For example, an applicant submits SAT scores taken on October 1, 2007 and Jan 15, 2008. The Blackbaud Student Information System calculates the composite score from the Jan 15, 2008 test.

Subtests without a date or a score are not calculated in the composite score. For those subtests without a date, the message “Missing subtests for best score” appears where the subtests total value should be on the Test tab of the applicant record.

• “combined highest composite score” – For each subtest in the test type definition, the system compares the subtest scores to determine the highest value. The system calculates the highest value of each subtest to determine the best score for the test type.

If there are multiple scores for the same subtest where the scores are equal but the dates are different, the system determines the best score using the first test record entry. For example, an applicant took the English subtest of the SAT three times. Each time, the applicant scored a 650. When the applicant submits those scores to the school, The Blackbaud Student Information System uses the 650 score from the first test.

A comparison cannot be made for subtests without a score. The subtest appears as a row on the Test tab of the applicant record, but the score information is blank. Also, the total best score is not calculated and the message “Missing subtests for best score” appears where the subtests total value should be.

6. To save the new test type definition, click OK. You return to the Test Type Definitions page.

Test Equivalents

If your school accepts scores from various standardized tests, The Blackbaud Student Information System helps you compare those scores to determine which applicants to accept. On the Test Equivalents page in Configuration, you can define corresponding test score ranges for each test type.

Each test score on an applicant’s record is compared to the test score range of the appropriate test type to determine where the applicant’s score belongs. In addition, that test score corresponds to the test score range of another test type.

For example, you define an SAT test score range of 400-800 and an ACT test score range of 1-18. If an applicant has total SAT score of 780, that score falls into the defined SAT range of 400-800 but it is also corresponds with the ACT equivalent range of 1-18.
Define test equivalents

1. From the Configuration page, click Test Equivalents. The Test Equivalents screen appears.

2. In the Test Type 1 column, select the name the test type. For example, select “SAT”.

   **Note:** Test 1 From Score is a required field. You must enter a value in this field to save the test score range.

3. In the Test 1 From Score and To Test 1 Score columns, enter first test score range. For example enter “400” and “800” in both columns to create a SAT test score bucket of 400-800.

4. In the Test Type 2 column, select the name of the second test type. For example, select “ACT”.

5. In the Test 2 From Score and To Test 2 Score columns, enter the second test score range. For example enter “1” and “18” in both columns to create an ACT test score bucket of 1-18.

6. Repeat steps 2-5 to create additional test score buckets.

7. To save your test equivalents, click OK. You return to the Configuration page.

Recruiter Calculations

Recruiters are invaluable to your school’s admissions process. When you appropriately match recruiters to potential students, you maximize the applicant’s recruiting experience. Whether you use geographic market, status, or school as criteria to match recruiters to applicants, The Blackbaud Student Information System helps you easily create and track recruiter assignments.

On the Recruiter Calculations page in Configuration, you can create new recruiter calculations. Within a calculation, specify criteria to be used when assigning recruiters to applicants. Automatically assign recruiters to one or multiple applicants once you create and save the applicant record. For reports, you can use the Current recruiter filter in the Breakdown column for the Applicant Summary and Status History Summary reports.
Defining Recruiter Calculations

1. From the Configuration page, click Recruiter Calculations. The Recruiter Calculations page appears.

2. In the School field, select the school for which you are creating the new recruiter calculation. This field appears only if you have multiple schools within your system.


4. In the Calculation name field, enter a name for the recruiter calculation that reflects the criteria you want to apply. For example, enter “Northwest Region”.

5. In the Recruiter field, you can assign a recruiter to your specific market or region. To search for a recruiter, click the binoculars to access the Open screen. From the Open screen, you can select an existing faculty member.

6. If you do not want the calculation record to be included when the program assigns recruiters to applicants, mark Inactive.

Note: You can assign a recruiter to multiple markets and regions.
7. Use the filters grid to select criteria for the calculation record. For example, you may want to specify to include all schools in your system, statuses of applied and inquiry, and the geographic markets for pacific and northwest. When filtering by applicant status, the program matches information in the **Current status** field on the Bio 1 tab of an applicant record. When filtering by geographic market, the program matches information in the **Geographic market** field on the Applications tab of an applicant record. For more information about these application record fields, see the Applicants chapter of the *Records Guide for Admissions Office*.

**Warning:** If a faculty or staff member is a recruiter with active applicants assigned and you unmark the **Current recruiter** checkbox on the Bio 1 tab of the recruiter record, we recommend using global change functionality to update applicant records who were originally assigned to the recruiter.

Once applicant records are saved, the recruiter is assigned to all applicants meeting the criteria you specified in the filters grid. Only applicant records who currently do not have a recruiter assigned will be considered.

If you make changes to the calculation record and applicants have already been assigned to the recruiter, we recommend using global change functionality to update those applicants. In addition, if a recruiter is marked terminated, we recommend updating existing calculation records using global change. For more information about globally changing records, see the *Administration Guide for Blackbaud Student Information System*.

**Note:** Once an applicant becomes a student in your database, the recruiter is still assigned to the student.

8. To save your recruiter calculation criteria and close the record, click **Save and Close**.
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