Blackbaud

Student Information System™

Administration Guide
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Administration in Blackbaud Student Information System contains utilities and housekeeping tools you can use to set up your database, establish system security, import records, and globally change records. You can also view system statistics, check the database for duplicate records, and validate the database. The Status Wizards located within Administration provide an efficient way for global or individual processing of applicant and student progression.

This chapter is designed to familiarize you with all of the administration utilities found in Admissions Office and Registrar’s Office. This chapter also includes information about accessing and navigating the Administration page.

For information about importing records, see the Import Guide for Blackbaud Student Information System. For information about queue, see the Queue Guide for Blackbaud Student Information System.

Navigating in Administration

The Administration link does not appear on the navigation bar if a user does not have security rights to access Administration.

The Administration page is the central location for accomplishing administrative tasks. Click Administration on the navigation bar to access the Administration page. Each task available in Administration appears as a link. The links available on the Administration page can vary depending on the program you have open.

You move through the Administration page the same way you move through other areas of the program. To access the different utilities on the page you can click the links. Common areas include the menu bar and toolbar.

For more information about the menu bar, toolbar, and program navigation, see the Program Basics chapter of the Program Basics Guide.
Administrative Tasks

Using the maintenance tools available in Administration, you can perform a variety of administrative tasks, such as setting up system security, importing records, globally changing records, viewing system statistics, checking the database for duplicate records, and validating the database.

The utilities described in this section are found in Admissions Office and Registrar’s Office. Detailed information and procedures for setting up security and globally changing records are found in separate chapters of this guide.

Setting Up Admissions Office

The Set up page in Administration contains a list of links to areas you need to customize before beginning daily operations in Admissions Office. We strongly recommend you complete these tasks in order after you install or convert to Admissions Office.

**Note:** To quickly access help topics for a specific program area, press F1 on your keyboard.

To help you track your progress setting up Admissions Office, you can use this checklist as a worksheet to record completion dates for each task.

<table>
<thead>
<tr>
<th>Set up task</th>
<th>Date complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter general information</td>
<td></td>
</tr>
<tr>
<td>Enter your organization’s primary mailing address and phone number.</td>
<td></td>
</tr>
<tr>
<td>Set up schools</td>
<td></td>
</tr>
<tr>
<td>The program can support more than one school at a time. If you plan to record information for more than one school, we strongly recommend doing this now.</td>
<td></td>
</tr>
<tr>
<td>Configure business rules</td>
<td></td>
</tr>
<tr>
<td>Business rules determine how Admissions Office works for all users. We strongly recommend reviewing the Admissions Office business rules before you proceed.</td>
<td></td>
</tr>
<tr>
<td>Add table entries</td>
<td></td>
</tr>
<tr>
<td>You must add table entries for applicant statuses. You may want to enter entries in other tables at this time.</td>
<td></td>
</tr>
<tr>
<td>Create attributes (Optional)</td>
<td></td>
</tr>
<tr>
<td>You can create attributes for applicants, organizations, faculty/staff, education, addresses, and individuals. If you plan to require attributes, create them now.</td>
<td></td>
</tr>
<tr>
<td>Customize data entry fields (Optional)</td>
<td></td>
</tr>
<tr>
<td>You can customize the behavior of some data entry fields in Admissions Office. For example, you can make the Applicant ID field a required field. If you plan to customize data entry fields, we strongly recommend doing this before entering any data into the program.</td>
<td></td>
</tr>
<tr>
<td>Set up system security</td>
<td></td>
</tr>
<tr>
<td>You can define users for people allowed to access the program. By default, all defined users can see all Admissions Office information and perform all tasks. Through security, you can restrict the information and tasks that groups of users can access.</td>
<td></td>
</tr>
</tbody>
</table>
Setting Up Registrar’s Office

The Set up page in Administration contains a list of links to areas you need to customize before beginning daily operations in Registrar’s Office. We strongly recommend you complete these tasks in order after you install or convert to Registrar’s Office.

**Note:** To quickly access help topics for a specific program area, press F1 on your keyboard.

To help you track your progress setting up Registrar’s Office, you can use this checklist as a worksheet to record completion dates for each task.

<table>
<thead>
<tr>
<th>Set up task</th>
<th>Date complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Set up addressees/salutations</strong></td>
<td></td>
</tr>
<tr>
<td>You can define the way names can appear in the program</td>
<td></td>
</tr>
<tr>
<td>in certain situations by setting up Addressee/Salutations.</td>
<td></td>
</tr>
<tr>
<td><strong>Create data entry defaults (Optional)</strong></td>
<td></td>
</tr>
<tr>
<td>If you often use the same information when entering new</td>
<td></td>
</tr>
<tr>
<td>records, you can save time during data entry by loading</td>
<td></td>
</tr>
<tr>
<td>default information you define.</td>
<td></td>
</tr>
<tr>
<td><strong>Enter international address formats</strong></td>
<td></td>
</tr>
<tr>
<td>Predefined address formats are provided for Australia,</td>
<td></td>
</tr>
<tr>
<td>Canada, New Zealand, the United Kingdom, and the United</td>
<td></td>
</tr>
<tr>
<td>States. If you use other international addresses, you can</td>
<td></td>
</tr>
<tr>
<td>determine how each country's address will be formatted.</td>
<td></td>
</tr>
<tr>
<td><strong>Set up tracks (Optional)</strong></td>
<td></td>
</tr>
<tr>
<td>Tracks allow you to keep track of an applicant’s progress</td>
<td></td>
</tr>
<tr>
<td>through the application process. If you use Tracks, we</td>
<td></td>
</tr>
<tr>
<td>recommend setting them up now.</td>
<td></td>
</tr>
<tr>
<td><strong>Enter room records</strong></td>
<td></td>
</tr>
<tr>
<td>Before you create events, add rooms. You can do this</td>
<td></td>
</tr>
<tr>
<td>manually or import the information into the program.</td>
<td></td>
</tr>
<tr>
<td><strong>Define events (Optional)</strong></td>
<td></td>
</tr>
<tr>
<td>By creating events, you can define holidays and special</td>
<td></td>
</tr>
<tr>
<td>occasions at your school. If you have recurring events,</td>
<td></td>
</tr>
<tr>
<td>we recommend setting them up now.</td>
<td></td>
</tr>
<tr>
<td><strong>Create academic years (Optional)</strong></td>
<td></td>
</tr>
<tr>
<td>Define dates for each academic year to help for reporting</td>
<td></td>
</tr>
<tr>
<td>purposes. You can always create new academic years later</td>
<td></td>
</tr>
<tr>
<td>or use tables to create academic years without dates.</td>
<td></td>
</tr>
</tbody>
</table>

**Setting Up Registrar’s Office**
<table>
<thead>
<tr>
<th>Set up task</th>
<th>Date complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Configure business rules</strong></td>
<td></td>
</tr>
<tr>
<td>Business rules determine how <em>Registrar’s Office</em> works for</td>
<td></td>
</tr>
<tr>
<td>all users. We strongly recommend reviewing the *Registrar’s</td>
<td></td>
</tr>
<tr>
<td>Office* business rules before you proceed.</td>
<td></td>
</tr>
<tr>
<td><strong>Add table entries</strong></td>
<td></td>
</tr>
<tr>
<td>You must add table entries that correspond with students’</td>
<td></td>
</tr>
<tr>
<td>current statuses and other student information.</td>
<td></td>
</tr>
<tr>
<td><strong>Create attributes (Optional)</strong></td>
<td></td>
</tr>
<tr>
<td>You can create attributes for students, organizations,</td>
<td></td>
</tr>
<tr>
<td>faculty/staff, courses, and individuals. If you plan to</td>
<td></td>
</tr>
<tr>
<td>require attributes, create them now.</td>
<td></td>
</tr>
<tr>
<td><strong>Customize data entry fields (Optional)</strong></td>
<td></td>
</tr>
<tr>
<td>You can customize the behavior of some data entry fields in</td>
<td></td>
</tr>
<tr>
<td><em>Registrar’s Office</em>. For example, you can make the Student</td>
<td></td>
</tr>
<tr>
<td>ID field a required field. If you plan to customize data</td>
<td></td>
</tr>
<tr>
<td>entry fields, we strongly recommend doing this before</td>
<td></td>
</tr>
<tr>
<td>entering any data into the program.</td>
<td></td>
</tr>
<tr>
<td><strong>Set up system security</strong></td>
<td></td>
</tr>
<tr>
<td>You can define users for people allowed to access the</td>
<td></td>
</tr>
<tr>
<td>program. By default, all defined users can see all *Registrar’s</td>
<td></td>
</tr>
<tr>
<td>Office* information and perform all tasks. Through security,</td>
<td></td>
</tr>
<tr>
<td>you can restrict the information and tasks that groups of</td>
<td></td>
</tr>
<tr>
<td>users can access. If you have the optional module *Faculty</td>
<td></td>
</tr>
<tr>
<td>Access for the Web*, you can also define users for your</td>
<td></td>
</tr>
<tr>
<td>faculty/staff members to receive limited access to certain</td>
<td></td>
</tr>
<tr>
<td>areas of <em>Registrar’s Office</em> and access to *Faculty Access</td>
<td></td>
</tr>
<tr>
<td>for the Web*.</td>
<td></td>
</tr>
<tr>
<td><strong>Set up scheduling information</strong></td>
<td></td>
</tr>
<tr>
<td>Before you can enter requests, create classes, and enroll</td>
<td></td>
</tr>
<tr>
<td>students in classes, you must define cycles, timetables,</td>
<td></td>
</tr>
<tr>
<td>patterns, and scheduling rules. If you plan to schedule,</td>
<td></td>
</tr>
<tr>
<td>create these now.</td>
<td></td>
</tr>
<tr>
<td><strong>Set up grading information</strong></td>
<td></td>
</tr>
<tr>
<td>Before you can enter grades and run calculations, you must</td>
<td></td>
</tr>
<tr>
<td>define marking columns, translation tables, skills,</td>
<td></td>
</tr>
<tr>
<td>comments, performance categories, and rank intervals and</td>
<td></td>
</tr>
<tr>
<td>calculations. If you plan to enter any grading information,</td>
<td></td>
</tr>
<tr>
<td>create these now.</td>
<td></td>
</tr>
<tr>
<td><strong>Set up attendance codes</strong></td>
<td></td>
</tr>
<tr>
<td>Define absence codes and tardy codes for attendance entry.</td>
<td></td>
</tr>
<tr>
<td>If you plan to enter any attendance, create these now.</td>
<td></td>
</tr>
<tr>
<td><strong>Set up addressee/salutations</strong></td>
<td></td>
</tr>
<tr>
<td>You can define the way names can appear in the program in</td>
<td></td>
</tr>
<tr>
<td>certain situations by setting up Addressee/Salutations.</td>
<td></td>
</tr>
<tr>
<td><strong>Create data entry defaults (Optional)</strong></td>
<td></td>
</tr>
<tr>
<td>If you often use the same information when entering new</td>
<td></td>
</tr>
<tr>
<td>records, you can save time during data entry by loading</td>
<td></td>
</tr>
<tr>
<td>default information you define.</td>
<td></td>
</tr>
<tr>
<td>Set up task</td>
<td>Date complete:</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Enter international address formats</strong></td>
<td></td>
</tr>
<tr>
<td>Predefined address formats are provided for Australia, Canada, New Zealand, the United Kingdom, and the United States. If you use other international addresses, you can determine how each country’s address will be formatted.</td>
<td></td>
</tr>
<tr>
<td><strong>Enter room records</strong></td>
<td></td>
</tr>
<tr>
<td>Before you create events, add rooms. You can do this manually or import the information into the program.</td>
<td></td>
</tr>
<tr>
<td><strong>Define events (Optional)</strong></td>
<td></td>
</tr>
<tr>
<td>By creating events, you can define holidays and special occasions at your school. These events can affect whether classes meet. If you have recurring events, we recommend setting them up now.</td>
<td></td>
</tr>
<tr>
<td><strong>Create academic years</strong></td>
<td></td>
</tr>
<tr>
<td>If you plan to enroll students in classes, enter grades, or enter attendance, you need to create academic years. At least one academic year must be defined. You can always create new academic years later.</td>
<td></td>
</tr>
<tr>
<td><strong>Enter course records</strong></td>
<td></td>
</tr>
<tr>
<td>Before you can create schedules, enter grades, or enter attendance, you must enter information about the courses your school offers. You can do this manually or import the information into the program.</td>
<td></td>
</tr>
<tr>
<td><strong>Enter faculty/staff records</strong></td>
<td></td>
</tr>
<tr>
<td>Before you can assign advisors to students, create conduct, or create schedules, you must enter your faculty and staff into the program. You can do this manually or import the information into the program. If you have the optional module Faculty Access for the Web, faculty/staff records must be defined to associate users with the correct classes and students.</td>
<td></td>
</tr>
</tbody>
</table>

**Viewing System Statistics**

Click **View system statistics** on the Administration page to view up-to-date totals of all your database records. For example, in **Admissions Office** you can view the number of applicants and actions and in **Registrar’s Office** you can view the number of courses and classes.

- **Viewing system statistics**

**Note:** While this procedure is written for viewing system statistics in **Registrar’s Office**, you can use the same steps in **Admissions Office**.
1. From the Administration page in Registrar’s Office, click View system statistics. The View system statistics page appears displaying up-to-date statistics about the records, processes, and activities in your database.

![View system statistics page](image)

2. To return to the Administration page, click Administration on the navigation bar or click Back.

Importing Records

Importing records is the process in which you move data from other programs into Admissions Office or Registrar’s Office. Instead of opening a new or existing record and adding information, you place the information in an import file and use the Import records to create new records automatically or update existing records.

Importing records is particularly useful if your organization maintains multiple databases, or if you need to combine two or more databases into one.

For more information about importing records, see the Import Guide for Blackbaud Student Information System.

Globally Changing Records

By globally changing data, you can change information in your database based on a group of records you specify. Using Globally change records, you can add, delete, copy, move, swap, replace, partially replace, increase, or decrease values in a field you select.

In Admissions Office, you can globally change fields for applicants, faculty/staff, individuals, and organizations. In Registrar’s Office, you can globally change fields for students, faculty/staff, individuals, organizations, courses, and rooms.

For more information about globally changing records, see “Global Change” on page 39.

Searching for Duplicate Records

**Note:** You can also search for duplicate records from an open record.
Using **Search for duplicates**, you can view duplicate criteria and report on duplicate records. You can search for duplicate applicants, faculty/staff members, individuals, and organizations in **Admissions Office**. In **Registrar’s Office**, you can search for duplicate students, faculty/staff members, individuals, organizations, courses, and rooms.

**Note:** You must have the appropriate security rights to search for duplicates by Social Security number. For more information, see the Security chapter of the *Administration Guide* for Blackbaud Student Information System.

The criteria used when searching for duplicate records is defined in Business Rules of *Configuration*. You can also specify the program check for duplicates automatically when creating new records. For more information, see the *Configuration Guide* for the respective program.

**Searching for duplicates**

While this procedure explains how to search for duplicates in **Registrar’s Office**, you can use the same steps in **Admissions Office**.

1. From the Administration page in **Registrar’s Office**, click **Search for duplicates**. The Duplicate Student Report screen appears.

   This screen defaults to “Student” for the duplicate search. You can change the duplicate search criteria by selecting another record in the **Duplicate [] criteria from Configuration** field.

   ![Duplicate Student Report](image)

   The **Field Name** and **Length** columns contain duplicate criteria defined in *Configuration*. You can change this information on the Business Rules page.

2. To create a query of all duplicate student records, mark **Create output query of duplicate records**. Once you create an output query, you can access it later in other areas of the program.

3. To preview the report, click **Preview**. A processing screen appears.

4. If you marked **Create output query of duplicate records**, the Save Static Query screen appears. If you did not create an output query, proceed to step 5.

   a. Enter a name and description and designate whether others can run and modify this query by marking the corresponding checkboxes.

   ![Save Static Query](image)
b. To save the query, click **Save**. If duplicate student records exist, the Duplicate Student Report screen appears displaying a preview of the report.

5. You can print, refresh, or send the report as email by clicking the corresponding buttons on the toolbar.

6. To close the preview and return to the Duplicate Report screen, click the red **X**.

### Globally Adding Records

**Warning:** To globally add records, a user must have security rights.

From **Admissions Office**, you can click the **Globally add records** link on the Administration page to add actions, checklist items, or tracks to a group of records.

From **Registrar’s Office**, you can click the **Globally add records** link on the Administration page to add actions to a group of records.

**Warning:** When globally adding records, the program does not check for existing actions, checklist items, or tracks. Duplication is possible.

### Globally adding actions

While this procedure explains how to add actions in **Admissions Office**, you can use the same steps in **Registrar’s Office**.

1. From the Administration page of **Admissions Office**, click **Globally add records**. The Globally Add Actions screen appears.

2. In the **Add** field, select “Actions”.

3. In the **For** field, select to whom you want to add the actions. The options available in this field depend on the record you are adding. In **Admissions Office**, you can select “Applicants”, “Faculty/Staff”, “Individuals”, or “Organizations”.

4. In the **From Group** field, use the binoculars to locate the query of the type of records you specified in the **For** field. If you have not created a query of records, you can click **Add a New Query** on the Open Query screen.
5. To specify the action details you are globally adding, click **Action Information**. The Global Add Actions screen appears. This screen varies depending on the record type you select to add.

![Global Add Actions screenshot](image)

6. In the **School** field, select the school for this action. This field appears only if you have multiple schools defined in **Configuration**.

7. In the **Action type** field, select the type of action to be taken.

8. In the **Start date** and **Time** fields, enter the date and time the action begins.

9. In the **End date** and **Time** fields, enter the date and time the action is completed.

10. In the **Priority** field, select the priority of the action. You can select “Low”, “Normal”, or “High”.

11. To send a reminder to a user, mark **Send reminder to** and select a user’s name. In the **Set reminder for** [ ] [ ] **beforehand** fields, enter the number of days, weeks, or months ahead of time.

12. In the **Assigned to** field, select the faculty/staff member, individual, student, or applicant who is assigned to complete the action. The **Assigned to type** field completes automatically based on the record type of the person selected. The action appears on the record of the person selected in the **Assigned to** field.

13. In the **Location** field, select where the action is to take place.

14. In the **Action status** field, select the status of the action. When the action is complete, mark **Action completed on** and enter a date.

15. In the **Action letter** field, select the letter to send. When the action letter is sent, mark **Action letter sent on** and enter a date.

16. In the **Description** box, enter a description for this action.

17. To update the status information, mark the **Update status information** checkbox and select the new status. If you mark this checkbox, when the status is complete, changes are reflected in the **Current status** field on the Applications tab.

18. To update the **Status date** field based upon completion of the action, you can select “Use date completed”, “Clear”, or leave the field blank.
   - To change the status date to the completed date of the action, select “Use completed date”.
   - To remove any date from the **Status date** field, select “Clear”.
Changes are reflected in the **Status date** field of the application for the selected school. If the application is the primary application, the **Status date** field on the Bio 1 tab is also updated.

The **Status as of start date** field completes based on the status of the record on the start date of the action.

19. In the **Status reason** field, enter the status reason to appear on the applicant’s record when the action is complete.

20. To add attributes and notes to the action, select the Attributes/Notes tab. For more information about adding attributes and notes, see the *Program Basics Guide*.

21. To save the action and return to the Globally Add Actions screen, click **Save and Close**.

22. To create a query of the actions not added, mark **Create exception query**.

23. To view a report of the changes you made, mark **Print a control report on** and select a printer.

24. To preview the global add, click **Preprocessing Report** to view the changes before the program makes them.

25. To add the actions, click **Add Now**.

**Globally adding checklist items and tracks**

1. From the Administration page of *Admissions Office*, click **Globally add records**. The Globally Add Actions screen appears.

   ![Globally Add Checklist Items and Tracks](image)

   2. In the **Add** field, select “Checklist Items and Tracks”. The screen name changes to Globally Add Checklist Items and Tracks.

   3. In the **For** field, select “Applicants”.

   4. In the **From Group** field, click the binoculars to locate a query of applicant records you want to change. If you have not created a query of the records, you can click **Add a New Query** on the Open Query screen.
5. To add checklist item information, click **Checklist Item Information**. The Global Add Checklist Items screen appears.

6. In the **School** field, select the school to which you want to add the checklist items. This field appears only if you have defined multiple schools in **Configuration**.

7. In the **Year** field, select the application year in which you want to add the checklist items.

8. In the **Item** column, select a checklist item.

9. In the **Date Requested** column, enter the date the checklist item is to be completed.

10. In the **Status** column, select the status of the checklist item.

11. In the **Completion Date** column, enter the date the item was completed.

12. If an amount is due for the checklist item, you can enter the amount in the **Amount Due** column. In the **Amount Received** column, enter the amount received for the checklist item.

13. In the **Comments** column, enter any additional comments about the checklist item.

14. In the **Letter** column, select a letter to be sent for the checklist item.

   When the letter is sent, mark the checkbox in the **Letter Sent?** column and enter a date in the **Letter Sent Date** column.

15. To add a new track, click **Add a New Track**. The Add a New Track screen appears.

16. In the **School** field, select the school containing the track. This field appears only if you have defined multiple schools in **Configuration**, and the applicant is applying to more than one.

   The **Year applied** field is automatically filled in based on the year applied to the selected school. If the **Year apply** field is blank on that school's application, "<undefined year>" appears in the **Year applied** field.
17. In the **Track** field, select the track.
18. To return to the Global Add Checklist Items screen, click **OK**.
19. To view track details, click **View Track Details**. The Track Details screen appears.

![Track Details Screen](image)

20. To remove a track, you can select a track in the grid and click **Remove a Track**.
21. To return to the Global Add Checklist Items screen, click **Close**.
22. To create a query of the checklist items or tracks not added, mark **Create exception query**.
23. To view a report of the changes you made, mark **Print a control report on** and select a printer.
24. To preview the global add, click **Preprocessing Report** to view the changes before the program makes them.
25. To add the checklist items, click **Add Now**.

### Status Wizards

The Status Wizards provide an efficient way for global or individual processing of applicant or student progression, such as acceptance, enrollment, reenrollment, and promotion. To provide consistency, you can create and save multiple sets of parameters customized for your school.

If you have **Admissions Office** installed, you can access the Update Applications wizard. If you have **Admissions Office** and **Registrar’s Office** installed, you can also access the Enroll Applications.

If you have **Registrar’s Office** installed, you can access the Mark for Reenrollment wizard.

For more information about Status Wizards, see “Status Wizards” on page 81.

### Merge Process

The merge process moves information from the duplicate faculty/staff, individual, organization, applicant, and student records, to the primary records.

**Warning:** As a precaution, we recommend running a backup each time you merge records.

If you integrated **Admissions Office** and **Registrar’s Office** with **Student Billing**, you can merge the records converted from **Student Billing** with records in **Blackbaud Student Information System**. This utility merges records that match based on the duplicate criteria you define, such as last name, first name, and address. The result is a single record that contains a combination of information from both records.
Merge Considerations

Before running the merge utility, you should review the following information and recommendations:

- Each time you run the merge utility, we recommend you make a valid backup of the database. Large amounts of data are being manipulated during this process, and without a backup, correcting the data could be difficult. You can recover merged records only by restoring to a backup.

- The amount of time it takes to run the merge utility will vary depending on your hardware and how many records you are merging.

- If you are trying to merge a large number of records, you should run the merge utility multiple times using different duplicate criteria.

- To ensure that applicant and student relation information merges successfully, we recommend you merge applicant and student records before merging individual and faculty/staff records.

- We recommend you merge duplicate records instead of deleting one of them so you do not lose any information.

- If you have saved merge parameter files, we recommend you review and validate the accuracy of your parameter files before merging. You should save any parameter files you create for future reference.

- If you previously used Academy Manager to integrate these programs in version 6 before converting to version 7, we recommend you first run the merge utility using Academy ID as the criteria. Then run again using name and address as the criteria.

- Blackbaud Student Information System and Student Billing security is set up separately, even for shared records. However, delete functionality is allowed only if a user has access to delete in both programs.

- You can merge multiple records at one time, however, we recommend running merge in groups.

- If you want to merge a student and individual, or applicant and individual, the individual will need to be converted first.

- When merging faculty and individual records, if the individual record has attributes which are not set up in Configuration for faculty records, the attributes for the individual record will be deleted during the merge process. To ensure these attributes are not deleted, the same attributes must exist on the faculty record prior to merging.

- When you integrate Admissions Office and Registrar’s Office with Student Billing, all the new student records will have an active billing status if you selected “Active” for the When an applicant is enrolled or a new student is created in Blackbaud Student Information System, default billing status to [ ] business rule in Student Billing. This is why the Keep billing status from the duplicate record option on the merge parameter form is very important.

- If records created by the Student Billing conversion need to be designated primary because the data is more up to date, you need to consider that the Current status created for those records for Registrar’s Office are just a default and do not reflect the appropriate current status. This is why the Keep current status from the duplicate record option on the merge parameter form is very important.

- Not merging duplicate records can be a form of data corruption. For example, in an integrated system, you might have two records per student in your database. Changes that users make to one record, such as phone number and address updates, will not be reflected on the other record. Therefore, Registrar’s Office users and Student Billing users will not view the same information when accessing a record.

Merging Records

The merge utility is available from the Administration page of Admissions Office, Registrar’s Office and Student Billing as a tool for ongoing duplicate identification and merging.

Before merging records, we recommend you review the Integration Planning Checklist located in the Integrating Student Billing with Blackbaud Student Information System guide, as well as “Merge Considerations” on page 14.

> Merging records
  1. From the Administration page, click Merge Records.
2. To create a new merge, click **New** on the action bar. The Merge Records screen appears.

![Merge Records screen](image)

3. In the **Merge using** field, select “specified criteria” or “specific records”. If you select “specified criteria”, you can enter duplicate criteria and review duplicate records based on that criteria before merging them into primary records. We recommend you select this option.

   If you select “specific records”, you manually select the primary records and the duplicate records to merge into the primary records on the Preview tab.

   ![Merge Records grid](image)

   **Note:** A faculty/staff record type in **Student Billing** is an individual record with **Faculty/Staff** marked on the Bio 1 tab.

4. In the **Merge records within these record types** box, mark the record types you want to merge. For example, to search only for duplicate student records, only mark the **Students** checkbox.

   If you are merging students and want to include applicants in the duplicate checking, mark **Include students when checking for duplicates**.

5. If you selected “specified criteria” in the **Merge using** field, you must select duplicate criteria in the grid for each selected record type. In the **Field Name** column, select the 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.

   When selecting duplicate criteria, please keep the following issues in mind:
   - When including “Academy ID” as criteria, Academy IDs that are zero or blank are ignored.
   - If you converted a record with an ID or SSN matching one already in the database, the duplicate ID or SSN was stored as an attribute instead. So if you are including ID or SSN as criteria, the program also checks for attributes with these values.
   - You must have the appropriate security rights to merge records based on Social Security numbers. For more information, see the Security chapter of the **Administration Guide** for **Blackbaud Student Information System**.
   - On certain record types, you can also mark an additional checkbox to check for duplicates in other record types. In applicant criteria, you can select to include student records. In faculty/staff criteria, you can select to include individual records. In student criteria, you can select to include applicant records.
   - Make sure you are choosing fields that were used the same across offices.
6. **In the When resolving a conflict between the records being merged use** field, select which record to use when merging records containing different values.

   - If you select “date last changed”, the program considers the record with the latest date last changed value as the primary record. We recommend you do not select this option if merging after conversion. If you are merging records after converting, be aware that the date last changed for the records is the conversion date.

   - If you select “the record with the attribute added by the Student Billing conversion”, the program considers the record converted from *Student Billing 6* to *Student Billing 7* as the primary record. If no records have this attribute or multiple records have this attribute, the program uses the one with the latest date last changed value as the primary record. Select this option if you want the student record coming from *Student Billing* to be the primary record.

   - If you select “the record without the attribute added by the Student Billing conversion”, the program considers the record not converted from *Student Billing 6* to *Student Billing 7* as the primary record (if there are two records, one with the attribute and one without). Select this option if you do not want the student record coming from *Student Billing* to be the primary record.

7. Mark **Keep billing status from the duplicate record** if you want to overwrite the billing status on the primary record with the billing status from the duplicate record. This is especially important when first merging *Student Billing 7* and *Admissions Office/Registrar’s Office 7* records together when *Student Billing 7* records are selected as the duplicate record.

   **Note:** We recommend using the merge utility as a tool for ongoing duplicate record identification and merging.

8. Mark **Keep current status from the duplicate record** if you want to overwrite the current status on the primary record with the current status from the duplicate record. This is especially important when first merging *Student Billing 7* and *Admissions Office/Registrar’s Office 7* records together when *Admissions Office/Registrar’s Office 7* records are selected as the duplicate record.

9. To create an output query of merged records included in the processing, mark **Create an output query of merged records**.

10. Select the Filters tab to further filter the included records. This tab is only available if you choose to merge using specified criteria.

11. Set the filters you want for the records included in the merge.
12. Select the Addresses tab to establish criteria for how to compare addresses on the records you are merging.

13. In the **When merging addresses, check the following fields for identical values** box, mark checkboxes for the address fields to check for duplicates. This helps the program determine which addresses on the duplicate record already exist on the primary record.

   If you want the addresses to merge even if the address type is different and everything else is identical, unmark **Address type**.

14. If you selected to check address lines, in **Use [ ] characters of the address lines**, enter the number of characters to check in the address lines for duplicates.

15. If you selected to check the ZIP/postcode, in the **Use [ ] characters of the ZIP/postcode**, enter the number of characters to check in the ZIP/postcode for duplicates.
16. Select the Preview tab to view the records the program considers duplicates based on your criteria.

![Merge Records](image)

17. The records listed are considered the primary records. To expand all of the rows for the records, click **Expand All** on the action bar. The rows under a primary record are considered the duplicate records that will be merged with the primary record.

![Merge Records](image)

18. Review the duplicate records found to determine if they look like duplicates or if you need to adjust your criteria. For example, if many duplicate records appear for one primary record, you probably need to adjust your criteria.

- To help with reviewing duplicate records, you can include columns for your criteria in the grid. Right-click the grid and select **Columns** to control the columns that appear.
- To review a record, select the row and click **Open** on the action bar.
- If there is more than one duplicate record for a primary record, the order of the duplicate records under the primary record determines which duplicate record's data is used first if a field is blank on the primary record. Put the most accurate duplicate record first in order. You can use the **Up** and **Down** buttons to rearrange the rows.
19. If you do not want to merge a record, unmark the checkbox in the **Merge?** column for the record.

20. If you selected “specific records” in the **Merge using** field on the General tab, select the Preview tab to select the primary records along with the duplicate records to merge.

21. To enter a primary record, click **Load Primary Record** on the action bar to search for and select a record.

22. To enter a duplicate record to merge into a primary record, search for and select the record in a row below the primary record. To add a row, you can select the row of the primary record and click **Insert Duplicate** on the action bar.

   If there is more than one duplicate record for a primary record, the order of the duplicate records under the primary record determines which duplicate record’s data is used first if a field is blank on the primary record. Put the most accurate duplicate record first in order. You can use the **Up** and **Down** buttons to rearrange the rows.

23. To omit a record from the merge, unmark the checkbox in the **Merge?** column.

24. When you are ready to begin the merge, click **Merge**.
25. When the merge is complete, the Merge Records Complete screen appears, displaying statistics about the processing.

![Merge Records Complete Screen](image)

26. Click **Close**. The control report appears with more detail about the processing.

### Comparing Addresses

When comparing addresses, the program ignores punctuation and uses address abbreviation equivalents to search for addresses that are the same but may be punctuated or abbreviated differently.

#### Punctuation

The following punctuation is ignored in the address text fields when searching for duplicate addresses:

- Hyphen
- Colon
- Apostrophe
- Period
- Semicolon
- Parenthesis
- Carriage return/line
- Feed

This punctuation is also ignored in phone types with a phone number type of Telephone Number, Fax Number, or Other, but not in phone types with a phone number type of Email Address or Web Address/URL.

#### Address Abbreviation Equivalents

This table lists the address abbreviation equivalents the program uses when comparing address lines.

<table>
<thead>
<tr>
<th>Address</th>
<th>Equivalent</th>
<th>Address</th>
<th>Equivalent</th>
<th>Address</th>
<th>Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annex</td>
<td>Anx</td>
<td>Freeway</td>
<td>Fwy</td>
<td>Rest</td>
<td>Rst</td>
</tr>
<tr>
<td>Apartment</td>
<td>Apt</td>
<td>Gardens</td>
<td>Gdns</td>
<td>Ridge</td>
<td>Rdg</td>
</tr>
<tr>
<td>Arcade</td>
<td>Arc</td>
<td>Gateway</td>
<td>Gtwy</td>
<td>River</td>
<td>Riv</td>
</tr>
<tr>
<td>Avenue</td>
<td>Ave</td>
<td>Glen</td>
<td>Gln</td>
<td>Road</td>
<td>Rd</td>
</tr>
<tr>
<td>Bayou</td>
<td>BYU</td>
<td>Green</td>
<td>Grn</td>
<td>Shoal</td>
<td>Shl</td>
</tr>
<tr>
<td>Beach</td>
<td>Bch</td>
<td>Grove</td>
<td>Grv</td>
<td>Shoals</td>
<td>Shls</td>
</tr>
<tr>
<td>Bend</td>
<td>Bnd</td>
<td>Harbor</td>
<td>Hbr</td>
<td>Shore</td>
<td>Shr</td>
</tr>
<tr>
<td>Bluff</td>
<td>Blf</td>
<td>Haven</td>
<td>Hvn</td>
<td>Shores</td>
<td>Shrs</td>
</tr>
<tr>
<td>Address</td>
<td>Equivalent</td>
<td>Address</td>
<td>Equivalent</td>
<td>Address</td>
<td>Equivalent</td>
</tr>
<tr>
<td>----------</td>
<td>------------</td>
<td>----------</td>
<td>------------</td>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td>Bottom</td>
<td>Btm</td>
<td>Heights</td>
<td>Hts</td>
<td>Spring</td>
<td>Spg</td>
</tr>
<tr>
<td>Boulevard</td>
<td>Blvd</td>
<td>Highway</td>
<td>Hwy</td>
<td>Springs</td>
<td>Spgs</td>
</tr>
<tr>
<td>Branch</td>
<td>Br</td>
<td>Hill</td>
<td>Hi</td>
<td>Square</td>
<td>Sq</td>
</tr>
<tr>
<td>Bridge</td>
<td>Brg</td>
<td>Hills</td>
<td>Hls</td>
<td>Station</td>
<td>Sta</td>
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<tr>
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<td>Brk</td>
<td>Hollow</td>
<td>Holw</td>
<td>Stravenu</td>
<td>Stra</td>
</tr>
<tr>
<td>Burg</td>
<td>Bg</td>
<td>Inlet</td>
<td>Inlt</td>
<td>Stream</td>
<td>Strm</td>
</tr>
<tr>
<td>Bypass</td>
<td>Byp</td>
<td>Island</td>
<td>Is</td>
<td>Street</td>
<td>St</td>
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<tr>
<td>Camp</td>
<td>Cp</td>
<td>Islands</td>
<td>Iss</td>
<td>Summit</td>
<td>Smt</td>
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<tr>
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<td>Cyn</td>
<td>Isle</td>
<td>Isle</td>
<td>Terrace</td>
<td>Ter</td>
</tr>
<tr>
<td>Cape</td>
<td>Cpe</td>
<td>Junction</td>
<td>Jct</td>
<td>Trace</td>
<td>Trce</td>
</tr>
<tr>
<td>Causeway</td>
<td>Cswy</td>
<td>Key</td>
<td>Ky</td>
<td>Track</td>
<td>Trk</td>
</tr>
<tr>
<td>Center</td>
<td>Ctr</td>
<td>Knolls</td>
<td>Knls</td>
<td>Trail</td>
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</tr>
<tr>
<td>Circle</td>
<td>Cir</td>
<td>Lake</td>
<td>Lk</td>
<td>Trailer</td>
<td>Trlr</td>
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<td>Clb</td>
<td>Landing</td>
<td>Lndg</td>
<td>Turnpike</td>
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<td>Cor</td>
<td>Lane</td>
<td>Ln</td>
<td>Union</td>
<td>Un</td>
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<td>Cors</td>
<td>Light</td>
<td>Lgt</td>
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<td>Loaf</td>
<td>Lf</td>
<td>Viaduct</td>
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<tr>
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<td>Ct</td>
<td>Locks</td>
<td>Lcks</td>
<td>View</td>
<td>Vw</td>
</tr>
<tr>
<td>Courts</td>
<td>Cts</td>
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<td>Ldg</td>
<td>Village</td>
<td>Vlg</td>
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<td>Mnr</td>
<td>Ville</td>
<td>Vi</td>
</tr>
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<td>Mdws</td>
<td>Vista</td>
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<td>Xing</td>
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<td>Mission</td>
<td>Msn</td>
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<td>Dm</td>
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<td>Divide</td>
<td>Dv</td>
<td>Mountains</td>
<td>Mtn</td>
<td>South</td>
<td>S</td>
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</table>
## How Information on Duplicate Records Merges with the Primary Record

This table provides information about how data on duplicate records merges with data on the primary record.

<table>
<thead>
<tr>
<th>Information</th>
<th>Record Type</th>
<th>What happens?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bio 1</td>
<td>All person records</td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
<tr>
<td>Bio 2 / Birth Information</td>
<td>Applicant/Student - all views</td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
<tr>
<td>Bio 2 / Billing Information and Billing Defaults</td>
<td>Student in <strong>Student Billing</strong></td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
</tbody>
</table>

### Address Conversion Table

<table>
<thead>
<tr>
<th>Address</th>
<th>Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive</td>
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<tr>
<td>Estates</td>
<td>Est</td>
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<tr>
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<td>Expy</td>
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</table>

<table>
<thead>
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<th>Address</th>
<th>Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neck</td>
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<td>Pkwy</td>
<td>Pky</td>
</tr>
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<td>Pky</td>
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<tr>
<td>Pines</td>
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<td>Rapids</td>
<td>Rpds</td>
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</table>

<table>
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<th>Equivalent</th>
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</tr>
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<td>NW</td>
</tr>
<tr>
<td>Southeast</td>
<td>SE</td>
</tr>
<tr>
<td>Southwest</td>
<td>SW</td>
</tr>
<tr>
<td>First</td>
<td>1 or 1st</td>
</tr>
<tr>
<td>Second</td>
<td>2 or 2nd</td>
</tr>
<tr>
<td>Third</td>
<td>3 or 3rd</td>
</tr>
<tr>
<td>Fourth</td>
<td>4 or 4th</td>
</tr>
<tr>
<td>Fifth</td>
<td>5 or 5th</td>
</tr>
<tr>
<td>Sixth</td>
<td>6 or 6th</td>
</tr>
<tr>
<td>Seventh</td>
<td>7 or 7th</td>
</tr>
<tr>
<td>Eighth</td>
<td>8 or 8th</td>
</tr>
<tr>
<td>Ninth</td>
<td>9 or 9th</td>
</tr>
<tr>
<td>Tenth</td>
<td>10 or 10th</td>
</tr>
</tbody>
</table>

---

**Table Notes:**

- **Bio 1** represents information on all person records.
- **Bio 2 / Birth Information** pertains to applicant/student information.
- **Bio 2 / Billing Information and Billing Defaults** apply to student billing defaults.

---

### Address Conversion Examples

- Drive Dr Neck NE
- Estates Est Orch NW
- Expressway Expy SE
- Extension Ext SW
- Falls Fls
- Ferry Fry
- Field Fld
- Fields Flds
- Flats Flt
- Ford Frd
- Forest Frst
- Forge Frg
- Fork Frk
- Forks Frks
- Fort Ft
- Drive Dr Neck NE
- Estates Est Orch NW
- Expressway Expy SE
- Extension Ext SW
- Falls Fls
- Ferry Fry
- Field Fld
- Fields Flds
- Flats Flt
- Ford Frd
- Forest Frst
- Forge Frg
- Fork Frk
- Forks Frks
- Fort Ft

---

**Address Conversion Logic:**

- **Extensions:** Dr, Est, Exp, Ext, Fl, Fr, Fld, Fld, Flt, Frd, Frst, Frg, Frk, Frks, Ft
- **States:** NE, NW, SE, SW
- **Streets:** NE, NW, SE, SW
- **Placeholders:** 1, 2, 3, 4, 5, 6, 7, 8, 9, 10
- **Extensions:** Dr, Est, Exp, Ext, Fl, Fr, Fld, Fld, Flt, Frd, Frst, Frg, Frk, Frks, Ft
- **States:** NE, NW, SE, SW
- **Streets:** NE, NW, SE, SW
- **Placeholders:** 1, 2, 3, 4, 5, 6, 7, 8, 9, 10
<table>
<thead>
<tr>
<th>Information</th>
<th>Record Type</th>
<th>What happens?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bio 2 / In-state Resident and Recruiting Information</td>
<td>Applicant in <strong>Admissions Office</strong></td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
<tr>
<td>Bio 2 / Other Schools Applied To</td>
<td>Applicant in <strong>Admissions Office</strong></td>
<td>Entries on duplicates are added to primary (though only one can have the <strong>Attending</strong> checkbox marked).</td>
</tr>
<tr>
<td>Bio 2 / Dormitory, Phone number, Roommate, Room, and Transportation</td>
<td>Student in <strong>Registrar’s Office</strong></td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
<tr>
<td>Bio 2 / Cars</td>
<td>Student in <strong>Registrar’s Office</strong></td>
<td>Entries on duplicates are added to primary.</td>
</tr>
<tr>
<td>Bio 2 / Date hired, Terminated on, Reason</td>
<td>Faculty/Staff</td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
<tr>
<td>Bio 2 / Department/Position, Education, Certifications</td>
<td>Faculty/Staff</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Visa/Passport</td>
<td>Applicant/Student - <strong>Admissions Office</strong> and <strong>Registrar’s Office</strong> views, Faculty/Staff</td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
<tr>
<td>Demographics</td>
<td>Applicant/Student - all views, Faculty/Staff, Individuals</td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
<tr>
<td>Photo</td>
<td>Applicant/Student - all views Faculty/Staff, Individuals</td>
<td>Copies information if on duplicate but not on primary, but does not replace existing data.</td>
</tr>
<tr>
<td>Information</td>
<td>Record Type</td>
<td>What happens?</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Primary address</td>
<td>All records</td>
<td>A record must have a primary address. If primary record does not have a primary address, the primary address from a duplicate record will be added.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If an address matches on the duplicate and primary records, but there are contacts on the duplicate record that are not on the primary record, the contacts are added to the address on the primary record. However, if a contact type is already in use on the primary record, the contact number for that contact type will only be copied from the duplicate if the contact number on the primary is blank.</td>
</tr>
<tr>
<td>Information</td>
<td>Record Type</td>
<td>What happens?</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Additional addresses</td>
<td>All records</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If an address matches on the duplicate and primary records, but the address on the duplicate record is linked to records not linked to on primary record, the links are added to the address on the primary record.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If an address matches on the duplicate and primary records, but there are contacts on the duplicate record that are not on the primary record, the contacts are added to the address on the primary record. However, if a contact type is already in use on the primary record, the contact number for that contact type will only be copied from the duplicate if the contact number on the primary is blank.</td>
</tr>
<tr>
<td>Primary addressee and Primary salutation</td>
<td>All person records</td>
<td>If primary record does not have a primary addressee or salutation, the primary addressee or salutation from a duplicate record will be added.</td>
</tr>
<tr>
<td>Additional addresses and salutations</td>
<td>All person records</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Information</td>
<td>Record Type</td>
<td>What happens?</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Attributes</td>
<td>All records</td>
<td>Entries on duplicates are added to primary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If a unique attribute exists on the primary record, attributes from the same</td>
</tr>
<tr>
<td></td>
<td></td>
<td>category on the duplicate record cannot be added.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For applicant/students, merging is specific to each view: applicant view in</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Admissions Office</strong>, student view in <strong>Registrar’s Office</strong>, and student</td>
</tr>
<tr>
<td></td>
<td></td>
<td>view in <strong>Student Billing</strong>.</td>
</tr>
<tr>
<td>Notes</td>
<td>All records</td>
<td>Entries on duplicates are added to primary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For applicant/students, merging is specific to each view: applicant view in</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Admissions Office</strong>, student view in <strong>Registrar’s Office</strong>, and student</td>
</tr>
<tr>
<td></td>
<td></td>
<td>view in <strong>Student Billing</strong>.</td>
</tr>
<tr>
<td>Actions</td>
<td>All records</td>
<td>Entries on duplicates are added to primary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For applicant/students, merging is specific to each view: applicant view in</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Admissions Office</strong>, student view in <strong>Registrar’s Office</strong>, and student</td>
</tr>
<tr>
<td></td>
<td></td>
<td>view in <strong>Student Billing</strong>.</td>
</tr>
<tr>
<td>Media</td>
<td>All person records</td>
<td>Entries on duplicates are added to primary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For applicant/students, merging is specific to each view: applicant view in</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Admissions Office</strong>, student view in <strong>Registrar’s Office</strong>, and student</td>
</tr>
<tr>
<td></td>
<td></td>
<td>view in <strong>Student Billing</strong>.</td>
</tr>
<tr>
<td>Information</td>
<td>Record Type</td>
<td>What happens?</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Applicant/Student - all views</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the same academic year exists on both, information from the duplicate is added if it does not exist on the primary.</td>
</tr>
<tr>
<td>History of Changes</td>
<td>All records</td>
<td>An entry is generated only when information is added to key fields on the primary record.</td>
</tr>
<tr>
<td>Relationships</td>
<td>All records</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the same relationship exists on both, information from the duplicate is added if it does not exist on the primary.</td>
</tr>
<tr>
<td>Activities</td>
<td>Student in Student Billing</td>
<td>Entries on duplicates are added to primary.</td>
</tr>
<tr>
<td>Annotations</td>
<td>Student in Student Billing</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Exceptions on Payers</td>
<td>Student in Student Billing</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Statements</td>
<td>Student in Student Billing</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Bill Codes</td>
<td>Student in Student Billing</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>EFT Bank Information</td>
<td>Student in Student Billing</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Default Schedules</td>
<td>Student in Student Billing</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Automatic Payments</td>
<td>Student in Student Billing</td>
<td>Entries on duplicates are added to primary.</td>
</tr>
<tr>
<td>Information</td>
<td>Record Type</td>
<td>What happens?</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Student Progression</td>
<td>Student in <em>Student Billing</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Education</td>
<td>Applicant/Student in <em>Admissions Office</em> and <em>Registrar's Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Tests</td>
<td>Applicant/Student in <em>Admissions Office</em> and <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Medical</td>
<td>Applicant/Student in <em>Admissions Office</em> and <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Activities</td>
<td>Applicant/Student in <em>Admissions Office</em> and <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Conduct</td>
<td>Student in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Applications</td>
<td>Applicant in <em>Admissions Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
</tbody>
</table>

If an entry matches on the duplicate and primary based on Year Apply, information from the duplicate entry is added if it does not exist on the primary entry.

An applicant view can be created for a primary record if the School and Current Status of an application on the duplicate matches an enrollment on the primary.
<table>
<thead>
<tr>
<th>Information</th>
<th>Record Type</th>
<th>What happens?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollments</td>
<td>Student in Registrar's Office</td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If an entry matches on the duplicate and primary based on School and Grade Enrolled, information from the duplicate entry is added if it does not exist on the primary entry.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A student view can be created for a primary record if the School and Current Status of an enrollment on the duplicate matches an application on the primary.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Merging class enrollments may cause a student’s classification to be recalculated if additional classes are added to the primary record and those classes are worth credits.</td>
</tr>
<tr>
<td>Schedule Changes</td>
<td>Student in Registrar's Office</td>
<td>Any entries on duplicate but not on primary are NOT added.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changes can be recorded when enrollments are added to a primary record during merge.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If a class is added to the primary record and a change is recorded, Changed On and Changed By will display the date of the merge and the user who ran the merge. You may want to note the original date and user who added the class on the duplicate record in the Comments column of the Schedule Changes screen.</td>
</tr>
<tr>
<td>Information</td>
<td>Record Type</td>
<td>What happens?</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Classification History</td>
<td>Student in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are NOT added.</td>
</tr>
<tr>
<td>Status Log</td>
<td>Applicant/Student in <em>Admissions Office</em> and <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added (only when application or enrollment is added).</td>
</tr>
<tr>
<td>Course Requests</td>
<td>Student in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Student and Faculty/Staff in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Grades</td>
<td>Student in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Attendance</td>
<td>Student in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Checklist Items</td>
<td>Applicant in <em>Admissions Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Conduct</td>
<td>Faculty/Staff in <em>Registrar’s Office</em></td>
<td>Entries on duplicates are added to primary.</td>
</tr>
<tr>
<td>Courses</td>
<td>Faculty/Staff in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Restrictions</td>
<td>Faculty/Staff in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
<tr>
<td>Faculty/staff information for Faculty Access for the Web</td>
<td>Faculty/Staff in <em>Registrar’s Office</em></td>
<td>Any entries on duplicate but not on primary are added.</td>
</tr>
</tbody>
</table>
Posting from Faculty Access for the Web

If you have the optional module Faculty Access for the Web, a Post from FAWeb link appears on the Administration page in Registrar’s Office.

You can use Post from FAWeb to post marking column grades, comments, and skill ratings from Faculty Access for the Web to Grades in Registrar’s Office.

For detailed information about posting from Faculty Access for the Web, see the Administration Guide for Faculty Access for the Web.

Queue

Using the optional module Queue, you can schedule a sequence of tasks, including reports, to run automatically and unattended. You can schedule the program to handle these time-consuming tasks overnight or while you are at lunch. Scheduling queues during non-working hours frees your critical resources — workstations and printers — for other tasks during normal working hours.

For more information about using Queue, see the Queue Guide for Blackbaud Student Information System.

Security Settings

By establishing security rights for your users, you can ensure the validity, consistency, and confidentiality of your data and determine which users can change or delete important records. By limiting viewing rights, you can control who sees sensitive information.

You can access security from Set up system security on the Administration page of any program.

Defining security rights for accessing Administration and using administrative tools is important for protecting the integrity of your data. The system administrator or supervisor in charge of setting security privileges should assign security rights to users based on specific job requirements. You can control rights to each task available in Administration. For more information about security rights, see “Security” on page 53.

Validating Your Database

Note: Before you validate your database, we recommend you run a backup.
We recommend validating your database on a regular basis. During the validation process, the program scans your database tables to determine if data corruption or inconsistencies are present. Errors may occur when software packages or operating systems corrupt your computer’s memory, or hardware problems corrupt the database file.

As a precaution, we recommend running a backup before validating your database. All users must be logged out of the database prior to starting the validation. Because the process can take several hours, we recommend you run it after business hours. Using the delay feature, you can set the start time for the validation to run.

Validating your database

1. From the Administration page in any program, click Validate database. The Database Validation screen appears.
2. To delay the validate database process to a specific time, mark the Delay the validation start time until checkbox and enter a time in the field. Do not mark this option if you want to validate your database immediately.
3. Click Continue. A confirmation screen appears.
4. If you are sure you want to continue, click Yes.

Note: To begin the validation process from the countdown screen regardless of the specified time, click Start Now.

If you delayed validation until a specified time, the countdown screen appears displaying the current time and the time scheduled for validation.

When the validation process begins, a processing screen appears.

Note: If an error occurs, contact Blackbaud’s Customer Support for assistance.
When processing is complete, a screen appears informing you that the program has finished validating your database. It also displays the elapsed time of the validation process.

5. To return to the Administration page, click **OK**.

### Generating NetClassroom IDs

If you have the optional module *NetClassroom*, **Generate NetClassroom IDs** appears on the Administration page in *Registrar’s Office*.

You can generate user IDs and passwords for selected student, individual, and faculty/staff records that do not currently have a user ID and password. The program does not overwrite existing user IDs and passwords.

You set the format of automatically generated IDs in business rules. For more information about business rules, see the *Configuration Guide for Registrar’s Office*.

- **Generating NetClassroom IDs**
  1. From the Administration page, click **Generate NetClassroom IDs**. The Generate Online User IDs and Passwords screen appears.

2. You can filter the records that are included. For more information about filtering, see the *Program Basics Guide*.

3. To generate the user IDs and passwords, click **Generate IDs**. A screen appears displaying the progress of the process.
4. When the process is complete, a screen appears showing the number of records processed and the number of records updated.

![Generate Online User IDs and Passwords](image)

Globally Add Hold Codes

From *Registrar’s Office* or, if you have *Student Billing*, click the *Globally Add Hold Codes* link on the Administration page to add hold codes to a group of student records.

- **Globally add hold codes**
  
  While this procedure explains how to globally add hold codes in *Registrar’s Office*, you can use the same steps in *Student Billing*.

  1. From the Administration page of *Registrar’s Office*, click *Globally Add Hold Codes*. The Globally Add Hold Codes screen appears.

![Globally Add Hold Codes](image)

  2. In the *Query name* field, click the binoculars to locate a query of student records you want to add hold codes. If you have not created a query of the records, you can click *Add a New Query* on the Open Query screen.

  **Note:** You define hold codes in *Configuration*. For more information about how to define hold codes, see the *Configuration Guide for Registrar’s Office*.

  3. In the *Hold code* field, select the hold code to add to the student records.

  4. In the *Start date* field, enter a start date for the hold code.

  5. In the *End date* field, enter an end date for the hold code, if one exists.
6. In the Reason field, you can edit the reason for the hold code or use the default reason you entered in Configuration.

7. To print a report of the student records assigned a new hold code, mark Print control report.

8. To create a query containing the students who were not assigned the hold code, mark Create exception query.

9. To review a preprocessing report before globally adding the hold code, click Preprocessing Report. The report lists the successfully added hold codes, student records with exceptions, and a description of the exceptions.

10. When you are ready to begin the global add, click Add Now. When the add is complete, a confirmation screen appears.

11. To view the control report, click View Control Report.

12. Click Close. You return to Administration page.

End Hold Codes

From Registrar’s Office or, if you have Student Billing, click the End Hold Codes link on the Administration page to end hold codes for a group of student records.

- End hold codes

While this procedure explains how to globally end hold codes in Registrar’s Office, you can use the same steps in Student Billing.

1. From the Administration page of Registrar’s Office, click End Hold Codes. The End Hold Codes screen appears. All records for students with hold codes appear.

2. In the End? column, select the student records to end the hold code.

3. To filter the records by hold code type, select a hold code type in the Hold code field.
4. To view more information about a student record, in the grid select the student and click **Go to student**. The student record appears.

5. You can also click **Deselect all** or **Select all** to quickly edit the end hold codes.

6. To end the hold codes, click **Update**. All student records with the **End?** column selected no longer have active hold codes on the student record. You return to the Administration page.

**Update FAWeb Statuses**

In *Registrar’s Office*, to easily update the posting and comment status in *Faculty Access for the Web* before you post classes, click **Update FAWeb Statuses** on the Administration page. Only records that meet the criteria in the dialog and the query will update. Academic years without sessions are not included. We recommend you notify teachers before changing the posting status of classes or comments status, as any updates will affect gradebooks.

- **Update posting statuses and comments in Faculty Access for the Web**
  1. From the Administration page in *Registrar’s Office*, click **Update FAWeb Statuses**. The Update FAWeb Statuses screen appears.

     ![Update FAWeb Statuses](image)

     2. In the **School** field, select the school for which you want to update comment or posting statuses. You can set up additional schools through *Configuration*.

     3. In the **Academic year** field, select the academic year for the comment or posting statuses you want to update. Your selection in this field determines the sessions and marking columns available on the rest of the screen.

     4. In the **Session** field, select the session for which you want to update.

     5. In the **Marking column** field, select the marking column associated with the session you want to update, such as QT 1 or QT 2.

     6. In the **Query name** field, click the binoculars to access the Open Query screen. From here, you can add a new query of classes or select an existing one to narrow your criteria for updating.

     7. To update class status, mark **Update posting status to** and select Ready or Not Ready.

     8. To update comments, mark **Update comment status to** and select an updated status, such as Approved or Editing needed. This checkbox is disabled if you selected “No one” in the **Gradebooks are reviewed by** field in *Faculty Access for the Web*.

     9. To included classes with a posted status in your update, mark **Include posted classes**. When you do not mark this checkbox, only classes with a posting status of Ready or Not ready are included in the update.

     10. To print a report of the updated class and comment statuses, mark **Print control report**.
11. To create a query containing the classes and comments that were not updated during this process, mark **Create exception query**.

12. To review a preprocessing report before updating class status and comments, click **Preprocessing Report**. The report lists the successfully updated class status and comments, any exceptions, and a description of the exceptions.

13. When you are ready to begin the update process, click **Update Now**. When the update is complete, a confirmation screen appears.

14. To view the control report, click **View Control Report**.

15. Click **Close**. You return to Administration page.
## Global Change

<table>
<thead>
<tr>
<th>Global Change Tabs</th>
<th>General Tab</th>
<th>Filters Tab</th>
<th>selected Filter Screens</th>
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You can change information in your database for a specified group of records. Using a global change, you can add, replace, partially replace, delete, increase/decrease, copy, swap, or move information, depending on which field you select to change. You can save a global change to run again as originally created or with modifications.

**Note:** Visit our website at www.blackbaud.com for the latest documentation and information.

After globally changing information, you can view a control report detailing all the records in your database that were changed or not changed, and why. Also, you can create a query of records that were changed and an exception query of records that cannot be changed. You can use these queries in other areas of the program.

In security settings, the supervisor can restrict the rights that allow users to globally change records. If a user does not have rights, the **Globally change records** link does not appear on the Administration page. Furthermore, users must have rights to globally change Social Security, credit card, and bank account numbers. For more information, see the Security chapter of the *Administration Guide* for *Blackbaud Student Information System*.

## Global Change Tabs

For a specific record type, you can make a global change to all records or a select group of records in your database. For example, if a telephone area code changes, you can use the partial replace operation to globally replace the old area code with the new one. If only certain cities are affected by the new area code, you can filter by a query of records containing specified city names in their addresses.

When creating a global change, you define change operations on the General tab and filter the records affected by the global change on the Filters tab. You can save a global change and run it later as it is or with modifications.
General Tab

On the General tab, you select the fields to which you want to make changes and specify the type of change you want to make.

Available fields. In the Available fields box, highlight the field you want to change and click Select. You can use the drop-down list, which defaults to <All fields>, to filter fields appearing in the box.

When you select a field, the Edit Change Parameters screen appears, on which you specify the type of global change. For more information, see “Global Change Operations” on page 44.

Apply changes to these fields. The change parameters you set appear in the Apply changes to these fields box.

Find. Click Find to search subcategories in the Available fields box. The Find function searches only expanded categories.

Note: You can also select a field in the Available fields box by double-clicking it.

Select. Click Select to choose fields to change. When you click Select, the Edit Change Parameters screen appears.

Remove. Click Remove to remove fields from a global change. You must highlight the field in the Apply changes to these fields box and then click Remove.

Criteria. Click Criteria to edit the item you select in the Apply changes to these fields box. The Edit Change Parameters screen appears, and you can edit the change parameters for the selected field.

Browse Changes. Click Browse Changes to view a sampling of selected changes. This button is active only if you are copying, moving, swapping, replacing, or partially replacing a field.

Note: A static query is a query that reflects only the records and data present at the time it is created.
Create a query of [ ] that have changes. Mark this checkbox to create a static query of all the records affected by the global change. For more information about queries, see the Query Guide.

Create control report. Mark this checkbox to view a list of records affected by the global change and information about records that could not be changed after the global change is run.

Automatically add new table entries. Mark this checkbox to add new table entries to code tables when copying, swapping, or moving data to a field that has values from a table. If you do not mark this checkbox, you could receive exceptions for fields that were not changed. We recommend you review the types of new entries being added before making a large global change that cannot be undone globally.

Create query of exceptions. Mark this checkbox to create a static query of records that the global change did not change. For more information about queries, see the Query Guide.

Cancel. Click Cancel to exit the Global Change screen without saving changes.

Preview Changes. Click Preview Changes to view change parameters before you process a global change.

Change Now. Click Change Now to process a global change. Changes cannot be undone, so we strongly encourage you to preview changes prior to making them.

Filters Tab

Note: If you are changing all records of one type in your database, you do not need to use the Filters tab.

You use the Filters tab to select the records in which you want to make a global change. On this tab, you can include all, selected, or a range of records. With some filters, you can also create a new query or use an existing query to filter by a specific group of records you want to globally change.

Open. When you highlight a filter in the grid and click Open, the Selected filter screen appears so you can edit filter settings. For more information about this screen, see “Selected Filter Screens” on page 43.
Clear All Filters. Click Clear All Filters to remove all filter parameters.

Filters. The Filters column displays the available filters for the selected record type to which you are making global changes.

Include. If you want to filter the records being changed, you choose Selected in the Include column for each filter you want to use. The Selected filter screen appears.

Selected Filters. The Selected Filters column displays your filter selections. You can click the binoculars in the field to open the Selected filter screen after you mark Selected in the Include column.

Cancel. Use Cancel to exit the Global Change screen without saving changes.

Preview Changes. Use Preview Changes to view change parameters before you process a global change.

Change Now. Use Change Now to process a global change. Changes cannot be undone, so we strongly encourage you to preview changes prior to making changes.

Selected Filter Screens

Two types of Selected filter screens can appear with additional fields and options. Screen options vary depending on the filter type.

Include. For each filter, you can select to include all or select specific filters. Depending on the filter, you may also be able to filter by a range or query.

All. If you mark All, you cannot designate specific filters.

Selected or Range. If you mark Selected or Range, a grid appears in which you can specify filters. In a field, you can click the binoculars to search for information.

Note: You can click the binoculars in the Query name field to search for a query. If you cannot find the query you need, you can create a new query by clicking Add a New Query at the top of the Open Query screen.

Query. If you mark Query, the Query name field appears for you to enter the name of the query by which to filter the report. In the field, you can click the binoculars to search for the query name.

To create a new query, click the binoculars. Then click Add a New Query on the Open Query screen. For more information about creating queries, see the Query Guide.

Previous Filter. To view or edit the previous filter without returning to the Filters tab, click Previous Filter.
Next Filter. To view or edit the next filter without returning to the Filters tab, click Next Filter.

OK. When you are finished specifying filters, click OK.

Cancel. If you do not want to save changes and want to return to the Filters tab, click Cancel.

Include. To filter, mark Selected.

Find. To search quickly for a particular item, you can enter full or partial text in the Find field. The first matching text in the filter box below the Find field appears highlighted.

Filters. The left box contains all the available filters. To select a filter, highlight it and click the right arrow button to move it to the Include these box.

Include these [ ]. This box contains the filters you have selected to include in the global change.

Previous Filter. To view or edit the previous filter without returning to the Filters tab, click Previous Filter.

Next Filter. To view or edit the next filter without returning to the Filters tab, click Next Filter.

OK. When you are finished specifying filters, click OK.

Cancel. If you do not want to save changes and want to return to the Filters tab, click Cancel.

Global Change Operations

The Edit Change Parameters screen appears when you highlight a field in the Available fields box on the General tab and click Select. In the Operation field you select to add, replace, partially replace, delete, increase, decrease, copy, move, or swap information in the field. Not all operations are available for every type of change. Depending on your selection in the Operation field, additional fields appear for you to enter information about the specific change.
For example, if you select the Replace operation, you must select or enter the current data you want to change in the Replace field and the new data with which you want to replace it in the With field.

For some record type fields, you can use the options Match case and Use pattern matching.

Match case. If you mark Match case, the program searches for the value exactly as you enter it in upper case or lower case letters. For example, you can search for only “south” and not “South”.

Use pattern matching. With pattern matching, you can search using wildcards in place of a letter or letters. Use an asterisk (*) to match any number of characters or use a question mark (?) to match any single character. When you select Use pattern matching, the Find whole words only option is enabled. For example, if you want to change only text containing the word “South” and not “Southern”, mark Find whole words only.

Add

The Add operation adds a value to empty fields and either replaces existing current values with the new value or makes no changes to fields already containing a value.

- If you do not mark Overwrite existing value, only empty fields receive the new value. Fields with existing values are not modified.
- If you mark Overwrite existing value, the program replaces the existing values in the field and adds the new value to empty fields.

For example, if you are globally adding a contact method to a group of applicant records and you leave Overwrite existing value unmarked, the contact method is added only to those records with no contact method selected. Records with a selected contact method remain unchanged. If you mark Overwrite existing value, the program replaces the contact method on the applicant record.

If you are adding an attribute that does not exist on a record yet, you must select Attribute from the Available fields box. If you want to add information to an attribute already existing on a record, you can select specific fields listed under a named attribute in the Available fields box.

Replace

The Replace operation searches for records that exactly match the value. For example, you can replace the value “In Process” with “Enrolled” in the Current status field of an applicant record. Select “In Process” in the Replace field and “Enrolled” in the With field. The program changes the status for all selected records in the global change.
If you want to replace a field value with an empty value, enter the value you want to overwrite in the Replace field and leave the With field blank. You cannot leave the With field blank for required fields.

Partial Replace

The Partial Replace operation searches for records containing the selected value. In a partial replace global change, you cannot replace a value with a blank as you can with the Replace function. You must enter or select data in the Partially replace field.

Note: Partial Replace is not available for code table fields.

For example, you can use Partial Replace to change the phone area code 803 with a new area code 843 for records you have selected in a query. Because the phone number field you are changing contains the entire phone number, you must use Partial Replace to replace only the first three digits with the new value. The remainder of the phone number stays unchanged.

Delete

The Delete operation removes the specified value from the selected field.

Warning: When you delete a group of records with a global change, you can recover those records only from a backup. We recommend you make a valid and recoverable backup of your database before you begin the process.

For example, if your organization wants to clean up the database and remove certain attributes that are no longer relevant, you can delete an entire attribute from all or specified records by selecting Attribute in the Available fields box. On the Edit Change Parameters screen, you must enter an Attribute type. If you leave the other fields blank, the attribute is deleted from every record. If you enter information in the other fields, only the attributes containing the specified information are deleted from records.

Increase/Decrease

The Increase/Decrease operation increases or decreases numeric values in fields by an exact amount or percentage. When increasing or decreasing values by a percentage, you specify the number of decimal places to which the final value should be rounded. For fields containing a date value, you increase or decrease the date by a specified number of days, weeks, months, or years. Increases and decreases take into account months with different lengths and leap years.


Copy

The Copy operation places the entire value of the source field into a compatible target field. To select the target field for the information you are copying, you click the binoculars in the Copy to field.

Note: You cannot copy, swap, or move fields that represent more than one value.
The Copy function always copies the specified value to empty target fields and either replaces existing current values with the new value or makes no changes to fields already containing a value.

- If you do not mark Overwrite existing value, only empty fields receive the copied value. Fields with existing values are not modified.
- If you mark Overwrite existing value, the program replaces the existing values in the field and adds the copied value to empty fields.

Swap

The Swap operation places the entire value from the source field into the target field, and the original value of the target field into the source field. In the Swap with field, click the binoculars to select the target field.

Move

The Move operation places the entire value of the source field into the target field and deletes the value from the source field. In the Move to field, click the binoculars to select the target field.

Note: You cannot delete, move, or replace required fields with a <blank>. You can only copy unique required fields.

The Move operation moves the specified value to empty target fields and either replaces existing current values with the new value or makes no changes to fields already containing a value.

- If you do not mark Overwrite existing value, only empty fields receive the new value. Fields with existing values are not modified.

Note: You cannot move a required field.

- If you mark Overwrite existing value, the program replaces the existing values in the field and adds the new value to empty fields.

Globally Changing Records

Warning: Before performing a global change, we strongly recommend you back up your database. For more information about creating backups, see the Database Administration Guide.

You can use a global change to add, edit, or delete a wide variety of record types in your database without accessing each record individually. We strongly recommend you completely back up your database before performing a global change.

Understanding the different record types is essential to successfully completing a global change. Selecting a specific record type instructs the program to include only records for that record type in the global change. The program globally changes every record of that type unless you use filters on the Filters tab to limit changes to only certain records.

Although this section contains a scenario procedure for performing a partial replace global change, the procedure is similar for all global change functions.
Globally changing information on a record using partial replace

**Scenario:** The telephone company has added a new area code in your state. The old area code 803 remains in use in many cities but will be replaced by 843 in other cities. You have determined which cities are affected by the change and have created a query containing applicants in those cities. Now you want to globally change your applicant records to reflect the new area code.

**Note:** While this procedure is written for globally changing information in *Admissions Office*, you can use the same steps in *Registrar's Office*.

1. On the Globally change records page of *Administration* in *Admissions Office*, select *Applicants* from the tree view.

2. Click **New Change** on the action bar. The Global Change - Applicant screen appears. In the tree view, click the plus sign next to **Applicant** to expand the field list.

3. Under **Applicant**, click the plus sign next to **Phone** to expand the field list. Highlight **Number** and click **Select**. The Edit Change Parameters screen appears.
4. In the *Operation* field, select “Partial Replace”. In the *Partially replace* field, enter “803”. In the *With* field, enter “843”.

5. Click **OK**. You return to the Global Change - Applicant screen. The change parameters appear in the **Apply changes to these fields** box.

6. To create a query of records that are changed, mark **Create query of applicants that have changes**. To create a query of records that cannot be changed, mark **Create a query of exceptions**.

7. Mark **Create control report** and select “Preview report”. Later, when you run the global change, the control report will appear after you view change statistics. You can print the report from the Preview Report screen.

   **Note:** For more information about queries, see the *Query Guide*.

8. Select the Filters tab if you want to add any filters to this global change.
9. Click the **Save** button on the toolbar. The Save Global Change As screen appears.

![Save Global Change As](image)

10. In the **Name** field, enter a name for your global change. In the **Description** field, enter a description.

11. Click **Save**. You return to the Global Change screen.

12. To check the records before globally changing them, click **Preview Changes**. The Preview Modifications screen appears.

![Preview Modifications for Applicant](image)

13. To remove any records from the global change process, unmark the checkbox in the **Change?** column. To run the global change, click **Change Now**.

14. When you run the global change, you are prompted to save the exception query and query of records changed. On the Save Static Query screens, enter a name and description and click **Save**.
15. When the global change is complete, a screen appears showing the global change statistics.

![Global Change Control Report](image)

**Warning:** Once you close the control report, you do not have another opportunity to view it or print it.

16. Click **Close**. The Global Change Control Report appears. To print the report, click the print button. Close the report when you are finished viewing it. You return to the Global Change - Applicant screen.

17. To close the global change, select **File, Close**.
Security

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By establishing security rights for your users, you can ensure the validity, consistency, and confidentiality of your data and determine which users can change or delete important records. By limiting viewing rights, you can control who sees sensitive information.

Security is based on groups and users that are members of groups. You identify the records and functions users access by creating a group and assigning users to that group. When a user logs into a program, the records and functions to which the user has rights are accessible and all other records and functions are unavailable.

We recommended reviewing the components and privileges of each program to determine the best security configuration for your organization. When security is properly set up, you are ensured that users are accessing only the areas you allow.

# Accessing Security

You can access security by clicking **Set up system security** on the Administration page of any program.

- **Accessing security**
  1. From the navigation bar, click **Administration**. The Administration page appears.
2. Click **Set up system security**. The Set up system security page appears.

3. To return to the Administration page, click **Back**.

**Supervisor Procedures**

We ship the program with “admin” as the Supervisor password. The Supervisor user name can access all areas of the program. For security purposes, it is very important that you change the Supervisor password immediately.

When you log into your **Blackbaud Student Information System** database as Supervisor, you have rights to perform all functions, such as globally changing or deleting applicant records. Because the Supervisor’s rights are so vast, we recommend you use a login with more limited security rights for routine work within the database. Doing so ensures you stop to consider the implications before making changes that may permanently alter your data.

**Warning:** The Supervisor and users with Supervisor rights have full access to all areas of the program. We recommend you limit the number of users with Supervisor security rights and knowledge of the Supervisor password.

There is only one Supervisor login; however, Supervisor rights can be assigned to other users. We recommend at least two users have Supervisor rights. Each user with these rights can access all areas of the program. These users should also know the password for the Supervisor user name.

A user with Supervisor rights also has supervisor rights to **Faculty Access for the Web**. However, you can grant a user supervisor rights to **Faculty Access for the Web** only by marking **FAWEB Supervisor Rights** on the user record. For more information about Supervisor rights to **Faculty Access for the Web**, see the Planning User Rights chapter of the **Administration Guide for Faculty Access for the Web**.
Changing the Supervisor password

Once the Supervisor password is changed, we recommend keeping it in a secure location accessible by at least two users.

1. From the Set up system security page, select **Supervisor** and click **Open** on the action bar. The User - Supervisor screen appears.

   ![User - Supervisor screen](image)

   **Note:** If you log in as Supervisor, you can change the password from anywhere in the program by selecting **Edit, Change Password** from the menu bar.

   2. Enter a new password in the **Password** field. The password must be at least eight characters, and include one alphabetic character and one non-alphabetic character.

   3. Reenter the password in the **Confirm** field.

   4. To return to the Set up system security page, click **Save and Close**.

Assigning Supervisor rights

1. From the Set up system security page, select the user to whom you want to assign Supervisor rights.

   **Note:** Only a user with Supervisor rights can access all areas of the program.
2. On the action bar, click **Open**. The User screen for the selected user appears.

3. In the **Groups for <Organization Name>** frame, mark **Supervisor rights**.
4. To save the change and return to the Set up system security page, click **Save and Close**.

**Passwords**

Each user must have a password to access the program. We recommend a unique password for each user. The Supervisor, or a user with Supervisor rights, can define and edit passwords for each user record.

A Supervisor can also grant users the right to change their own passwords by marking the **User can change password** option on the user’s security record. To change their password, the user needs to log into **Blackbaud Student Information System** and then select **Edit, Change Password** from the menu bar.
Changing a user’s password

1. From the Set up system security page, select a user and click Open. The User screen for the selected user appears.

2. In the Password field, delete the current password and enter a new password. The password must be at least eight characters, and include one alphabetic character and one non-alphabetic character.

3. Reenter the new password in the Confirm field.

4. To return to the User screen, click OK.

5. If entries in both the Password and Confirm fields are not identical, the following message appears when you try to save the record.

6. Click OK and reenter the new password in the Password and Confirm fields.

7. To save the changes and return to the Set up system security page, click Save and Close.

8. The Supervisor can select not to allow users to change their password. In that case, the option to change password will be grayed out on the menu bar.

Note: Only the Supervisor or a user with Supervisor rights can give a user the right to change the password. Users who have the right to change their passwords can do so from anywhere in the program by selecting Edit, Change Password from the menu bar.
Security for Groups

Security is based on groups and users that are members of groups. You identify the records and functions users access by creating a group with specific rights and assigning users to that group. When a user logs into a program, the records and functions to which the user has rights are accessible and all other records and functions are unavailable.

The first step in establishing security is to create security groups. Groups are composed of users who perform similar tasks or have similar responsibilities and, therefore, have similar security needs. Give the groups descriptive names you can easily identify, and then assign rights to a group based on the areas of the program to which you want its members to have access.

**Warning:** Before you begin setting up Security, we recommend you change the Supervisor password from the default.

For new installations of the program, and when you add a new database, you have three ready-to-use security groups to help you start quickly with maintaining system security. These groups are accessible on the Set up system security page. You can assign users to the Reporting Only group if they need to create report parameter files and run reports; the Read Only group if they need to view data in the system; and the Data Entry group if they need to view, enter, and manipulate data but not administer the system. The pre-created groups do not include users. You must create users and assign them to the groups. It is very important to review these groups to ensure they are appropriate for your organization.

Managing Security Groups

**Note:** Initially, a new security group has access to all areas of the program except those areas available only to users with Supervisor rights. For more information about Supervisor rights, see “Supervisor Procedures” on page 55.

By creating a security group and assigning users, you determine what areas of the program users can access. Properly setting up security ensures that users are accessing only the areas that you specify. We recommend thoroughly reviewing the privileges for each program.

You can create as many different groups as you need. As users are added to security, you can make them members of groups that grant them the appropriate levels of access.

If you create a group of users to have access to both *Admissions Office* and *Registrar’s Office*, you must set the same restrictions for records in both programs in order for the restrictions to work. If you do not set the same restrictions, the program uses the least restrictive rights. For example, if a user has read only access to faculty/staff records in *Admissions Office*, but editable access to faculty/staff records in *Registrar’s Office*, the user will have editable access to faculty/staff records in both programs.

- **Adding a security group**

  **Tip:** You can also access the New Group screen by double-clicking **Groups** in the tree view.
1. From the Set up system security page, click **New Group** on the action bar. The New Group screen appears.

![New Group Screen](image)

- **Group name** field: Enter a name for the user group. This name must be unique and no longer than 30 characters. We recommend you use a descriptive name for each group that you can easily remember.
- **Description** field: Enter a description for the user group.
- **Group type** field: Select the type of group you want to create. Your selection changes the options that appear on the Group Privileges tab.
- **System Components** box: Select a program or component. To restrict users from accessing the program, unmark the checkbox. With the box marked, a list of security privileges appears in the **Privileges** box on the right.
- **Privileges** box: Unmark the checkbox to prevent the group from accessing that area of the program. Leave the checkbox marked to allow the group access.

**Note:** If you make a user with Supervisor rights a member of a security group, his Supervisor rights are not affected.

2. In the **Group name** field, enter a name for the user group. This name must be unique and no longer than 30 characters. We recommend you use a descriptive name for each group that you can easily remember.

3. In the **Description** field, enter a description for the user group.

4. In the **Group type** field, select the type of group you want to create. Your selection changes the options that appear on the Group Privileges tab.

5. In the **System Components** box, select a program or component. To restrict users from accessing the program, unmark the checkbox. With the box marked, a list of security privileges appears in the **Privileges** box on the right.

6. In the **Privileges** box, unmark the checkbox to prevent the group from accessing that area of the program. Leave the checkbox marked to allow the group access.

**Note:** If no additional security rights are available for the selected privilege, the **Options** button is disabled.
7. To define additional levels of security, select a privilege and click **Options**. The Security Options screen appears.

8. In the box on the left, select a security option. If the option has additional security privileges, they appear on the right.

9. Mark the checkbox in the **View**, **Add**, **Edit**, and **Delete** columns for the program areas the group can access.

10. Some privileges have miscellaneous options. Mark a checkbox to give the group access or unmark to deny access to a function.

11. When you finish, click **OK** to return to the New Group screen.
12. Select the Group Members tab.

**Warning:** If you have not yet created users, the Not members box is blank.
13. Select a user from the **Not Members** box. Click the single right arrow to move the user to the **Members** box. Click the double arrows to move the entire list.

14. To return to the Set up system security page, click **Save and Close**.
Editing security group information

You can change the members and rights of a security group. The changes do not take effect until the member signs out and logs back into the program.

1. From the Set up system security page, select a group and click **Open**. The Group screen appears.

2. On the Group Privileges tab, you can edit information in the **System Components** and **Privileges** boxes. To edit security options, select a privilege in the **Privileges** box and click **Options**.
3. On the Group Members tab, you can add and remove users from security groups. Click the single arrow to move an individual or the double arrows to move all users.

4. To return to the Set up system security page, click **Save and Close**.
Deleting a security group

Deleting a security group does not delete the users of the group. You can re-assign the group's members as members of other groups.

1. From the Set up system security page, select the group to delete and click Open. The Group screen appears.

2. On the toolbar, click the Delete button. A confirmation message appears.

3. To delete the security group and return to the Set up system security page, click Yes.

Printing a security group profile report

Before you delete a security group or make significant changes, we recommend you print a security group profile.

1. From the Set up system security page, select the group whose profile you want to print.
2. Click **Open**. The Group screen appears.

![Group - Data Entry](image)

- **File**
- **Edit**
- **Group**
- **Help**

- **Save and Close**
- **Exit**
- **Search**
- **Help**

**Group name:** Data Entry

**Description:** Data entry only - no delete rights

**Group type:** Standard

**Group Privileges**

- System Components
  - Admissions Office
  - Registrar’s Office
  - Shared Tables
  - Shared Components
  - Shared Configuration Information

- Admissions Office Privileges
  - Records
  - Configuration
  - Code Tables
  - Query
  - Export
  - Reports
  - Mail
  - Administration
  - Notes
  - Dashboard
  - Online Admissions
  - Integration

3. To preview the report, select **File**, **Print Preview**.
4. To print the report, select **File**, **Print**.
5. To return to the Set up system security page, select **File**, **Close**.

**Understanding Group Privileges**

We recommended thoroughly reviewing the privileges of each program to determine the best use for your organization. When security is properly set up, you are assured that users access only the areas you allow.
When you select a program, items that comprise it appear in the **Privileges** box. These are the same items that appear on the navigation bar in the program shell.

**Note:** If you do not use a certain record type, you can unmark the checkbox in the **Record Types** column. The record type will not appear in **Records**.
If you select Records in the Registrar’s Office Privileges box and click Options, the Security Options screen appears. In the Record Types box, the record types for Registrar’s Office appear. These are the same items that you see when you click Records on the navigation bar.

For each option, mark View, Add, Edit, or Delete to assign group rights for that option. For example, if you unmark Add for the Notes tab for Individuals, the group cannot add notes to an individual record; however, the group can view and edit notes. N/A indicates an option is not available for the selected tab.

View. Mark View to allow a group to see the information in the specified record but not make changes.

Add. Mark Add to allow a group to add a record of the specified item, but not make changes.

Edit. Mark Edit to allow a group to make changes to the specified record.

Delete. Mark Delete to allow a group to delete the specified record.

The Miscellaneous Options box lists additional functions to which you can give the group access. For example, Convert to faculty and Convert to student are miscellaneous options for an individual record. Marking a box gives the group the ability to perform the function. Unmarking the box denies the group the ability to perform the function.

Security for Shared Components

Shared components are areas of Blackbaud Student Information System shared among programs. Shared components consist of Shared Tables such as the title and state tables; Shared Components such as system security; and Shared Configuration Information such as international settings.
If you select **Shared Components** from the **System Components** column, you can view the items that are shared among programs. The system components listed depend on the programs you have loaded.

**Blackbaud Student Information System Shared Components**

Select **Blackbaud Student Information System** from the **Shared Components Privileges** box and click **Options** to view the Security Options screen.

For each option on the Security Options screen, mark **View**, **Add**, **Edit**, or **Delete** to assign group rights to that tab. N/A indicates an option is not available for the selected tab.

**View.** Mark **View** to allow a group to see the information in the specified record but not make changes.

**Add.** Mark **Add** to allow a group to add a record of the specified item, but not make changes.

**Edit.** Mark **Edit** to allow a group to make changes to the specified record.
Delete. Mark Delete to allow a group to delete the specified record.

Personal Information Encryption

**Blackbaud Student Information System** encrypts personal information such as Social Security numbers. This means that this information is always masked on screens, reports, queries, and exports unless a user has security rights to add, edit, delete, view, or output personal information. It is very important that your school considers best practices for managing personal information before you grant security rights.

To protect personal information in your database, it is recommended that your school:

- Restricts access to personal information to only users with a specific need to view it.
- Ensures that users in contact with personal information understand their responsibilities.
- Does not send email containing personal information.

You may need to evaluate some of your existing practices. It is recommended that Social Security numbers are NOT used for these school-related items:

- Class Registration
- Class Rosters
- Computer Login
- Grade Reports
- Overdue Library Notices
- ID Cards
- Registration Postcards
- Internet Access
- Identification for Exams

You should plan for processes that require users to view personal information. For example:

During data entry, users must enter or import Social Security numbers on records. Users with security rights can view these numbers while entering them in fields, but the numbers are masked once the record is saved or reopened to edit.

If your school receives credit card payments, credit card numbers should be visible only when they are entered and authorized. Thereafter, credit card numbers should not be accessible to unauthorized persons.

Select **Personal Information** from the **Shared Component Privileges** box and click **Options** to view the Security Options screen.
Three options appear:

- **Personal Information Data Entry** — Marking this option allows a group to add, delete, or edit personal information on records, on Fast! datasheets, and via the API. They can also globally change or import personal information but they cannot output personal information.

  Once the record or datasheet is saved, personal information is masked so the group cannot view it. When editing personal information, users must delete the entire masked value before they can enter a different value.

- **Personal Information Output** — Marking this option allows a group to output personal information through mailings, reports, export files, import files, and the API. They cannot add, remove, edit, or view personal information on records or datasheets. If users do not have this right, they can output personal information, but it is always masked.

- **Personal Information View** — Marking this option allows a group to view personal information on records, datasheets, and via the API, but they cannot add, delete, edit, or output personal information.

### Security for Users

An individual user’s security privileges are determined by the group. You add users to security and then define their levels of access by assigning them to security groups. Using groups ensures data consistency, integrity, and confidentiality by limiting access to records and functions to the users who need it. A user can be a member of multiple groups.

- **Adding a user to a security group**

  **Tip:** You can also access the New User screen by double-clicking Users in the tree view.

  1. From the Set up system security page, click **New User** on the action bar. The New User screen appears.

  ![New User Screen](image)

  2. In the **User name** field, enter the name the user will use to log into the program.
3. In the Description field, enter a full name or other information to identify the user.

4. In the Connection Options frame, mark Use SIS Authentication if you want a user’s log in information for Blackbaud Student Information System to be separate from his or her workstation log in information.

5. If you mark Use SIS Authentication, enter the user’s password in the Password field. Enter the password again in the Confirm field.

Note: If you mark both the Use SIS Authentication and Use Windows Authentication checkboxes, this only affects whether or not a password is stored for the user. Blackbaud Student Information System always tries Windows authentication first, but if for some reason that fails, Blackbaud Student Information System User name/Password screen appears.

6. Mark Use Windows Authentication if you want a user’s log in information for Blackbaud Student Information System to be based on his or her Windows log in information. When users logged into a workstation through their Windows authentication access Blackbaud Student Information System, the Windows information is used to automatically log the user into the program.

To associate a user’s Windows authentication information with Blackbaud Student Information System, use the Login field to locate that user’s account on your network.

   a. Click the binoculars in the Login field. The Select User Account screen appears.

   b. In the List Names From field, select the system to which the user you want to select belongs.

   c. All members of the selected system appear in the Names box. Select the user you want to specify and click Add. The name appears in the Add Name field.

   d. Click OK. You return to the Security User screen where the user now appears in the Login field.

Note: Windows Authentication does not apply to Web applications.

7. In the User Type field, select “User can only access Blackbaud Student Information System”, “User can only access online modules”, or “User can access Blackbaud Student Information System and online modules”.

Warning: If you mark FAWEB Supervisor Rights, the Online Security tab automatically inactivates. A user can either have Supervisor rights or be an FAWeb teacher and administrator.

8. If the user can log into Faculty Access for the Web as Supervisor, mark FAWEB Supervisor Rights.

9. In the Groups for <Your Organization> frame, to assign the user full access to the programs, mark Supervisor rights. To restrict access to certain security groups, mark Selected group rights.

10. If you mark Selected group rights, select the user’s group from the Not a member of box and click the single right arrow to move the group to the Member of box.

11. To grant the user the right to change his password, mark User can change password. For more information about changing passwords, see “Passwords” on page 57.

12. To grant the user the right to change his options, mark User can change User Options. To set options, click Set this user’s options after saving the user to open the user’s options screen. At the bottom of the Options screen, you can click Copy From to copy another user’s options. Using this feature helps keep data consistent.

Note: Student security applies to Registrar’s Office only, not Student Billing.
13. If you have **Registrar’s Office**, select the Student Security tab.

14. In the **Student access** field, select the students you want the user to be able to access. If you select “Allow access to selected Students” or “Prevent access to selected Students”, mark **Query** or **Selected**. If you mark **Query**, in the **Query name** field, enter a query name or click the binoculars to locate the query. If you mark **Selected**, enter each student name in the **Student** column.
15. If you have Admissions Office, select the Applicant Security tab.

![Image of User Interface]

16. In the Applicant access field, select the applicants you want the user to be able to access. If you select “Allow access to selected Applicants” or “Prevent access to selected Applicants”, mark Query or Selected.

   If you mark Query, in the Query name field, enter a query name or click the binoculars to locate the query.

   If you mark Selected, enter each applicant name in the Applicant column.

**Warning:** The Online Security tab is disabled if you gave the user Supervisor rights to online modules.
17. If you granted the user rights to online modules and they are a *Faculty Access for the Web* user, select the Online Security tab.

18. In the **Online Systems** box, mark **Faculty Access for the Web** to give the user access to *Faculty Access for the Web*.

19. In the **Faculty/staff record to link to** field, you can link the user to a faculty/staff record. You can click the binoculars to access a list of faculty/staff records.

20. To give the user administrator rights to *Faculty Access for the Web*, mark **Has administrator rights in Faculty Access for the Web** field. An administrator can view information about all students.

21. To save the user security settings and return to the Set up system security page, click **Save and Close**.
Editing the security rights of a user

You can change the security rights of a user by changing the security groups to which the user belongs. You can add or remove a member from a group either directly from the user’s record or through the group record.

1. From the Set up system security page, select a user and click **Open** on the action bar. The User screen for the selected user appears.

   ![User Interface Screenshot]

2. To change the user’s group, select a group to change and use the arrows to move groups between the **Not a member of** and **Member of** boxes.

3. To save the changes and return to the Set up system security page, click **Save and Close**.

---

**Notes:**
- Ensure that the user has the appropriate permissions to access the system.
- Regularly review and update user permissions to maintain security.
- Keep user records and permissions confidential.

---

**Additional Resources:**
- User Management Guide
- System Security Policy
- Compliance Guidelines
Printing a security user profile report

You can print a security profile of the user before you delete the user name from security.

1. From the Set up system security page, select a user and click **Open**. The User screen for the selected user appears.

2. To preview the report, select **File**, **Print Preview**.

3. To print the report, select **File**, **Print**.

4. To return to the Set up system security page, select **File**, **Close**.

Deleting Users

You can delete a user from a security group when a user’s responsibilities change or a user leaves your organization. The user can no longer log into the system when deleted from security. However, the individual’s history of activity in the program with his user name attached is not removed from the database.

However, before deleting a user, log in as the user and check the settings and rights:

- If a user has action reminders scheduled and is deleted, the reminders remain active but never occur. We recommend you consider reassigning the action reminders to another user.
- The user may have created queries and exports that are restricted to other users. Open each of the user’s queries, select **Tools**, **Query Options**, and mark the checkboxes for other users to run and modify the query. Open each of the user’s exports, select **Tools**, **Export Options**, and mark the checkbox for other users to run and modify the export.
- The user may have restricted reports and mailings from other users. Open each of the user’s reports and mailings, select **File**, **Save As**, and mark the checkboxes for other users to run and modify the report or mailing.

Deleting a user from Security

**Warning:** We strongly recommend you print a security profile of the user before you delete him from security. For more information about the profile, see “Printing a security user profile report” on page 78.
1. From the Set up system security page, select the user to delete from the treeview.

![Image of the Set up system security page]

**Note:** To delete the user and still be able to reuse the user name, change the user name before deleting.

2. On the action bar, click **Delete**. The record opens and a message appears asking if you want to change the user name and save the record before deleting it.

   ![Image of the message asking to change the user name]

   **The Education Edge**

   If this record is deleted, the user name 'AndrewsMo' cannot be used again. Would you like to change the user name and save the record before deleting it?

   Yes  No

3. To delete the user, click **No**.
   
   To close the message and edit the record, click **Yes**.
Status Wizards

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The Status Wizards provide an efficient way for global or individual processing of applicant or student progression, such as acceptance, enrollment, reenrollment, and promotion. To provide consistency, you can create and save multiple sets of parameters customized for your school.

If you have only Admissions Office installed, you can access the Update Applications wizard. If you have Admissions Office and Registrar’s Office installed, you can also access the Enroll Applications wizard. If you have Admissions Office and Student Billing installed, you can use the Update Applications wizard to enroll applicants as students.

If you have Registrar’s Office installed, you can access the Mark for Reenrollment wizard.

Security rights for the Status Wizards are set in Administration. User rights can include running, editing, deleting, and adding Status Wizards. For example, a user may be able to run the Status Wizards, but not modify, create, or delete them. Security rights to the Status Wizards are not dependent on rights to individual records such as applicants, students, tracks, actions, applications, and enrollments. For more information about setting security options for Status Wizards, see the Administration Guide.

Warning: With the Status Wizards, you can update and process multiple records at one time. We recommend creating a valid backup before running a wizard.

You can access the wizards from an applicant or student record, the Applicants and Students pages, or the Administration page.

Accessing Status Wizards

You can access the Status Wizards from Administration, the Applicants and Students pages, or from applicant and student records. For example, if you have Admissions Office installed, you can access the Update Applications wizard directly from the applicant record. If you have Registrar’s Office installed, you can access the Mark for Reenrollment wizard directly from the student record.

From Administration, click Status Wizards, and the Status Wizards page appears.
From the Status Wizards page, you can access each Status Wizard, depending on what programs you have installed.

## Updating Applications

**Note:** Security rights for the Status Wizards are set in *Administration*.

With the Update Applications wizard, you can update the status information of applications. For example, you can accept or deny applicants.

If you have only *Admissions Office* installed, you can reenroll a group of applicants by updating status and checklist/track information. If you have *Admissions Office* and *Student Billing* installed, you can use the Update Applications wizard to enroll applicants as students.

**Warning:** With the Update Applications wizard, you can update and process multiple records at one time. We recommend creating a valid backup before running the wizard.

You can access the Updating Applications wizard from *Administration*, or from the applicant record.

- **Updating applications**
  1. From the Status Wizards page in *Administration*, select *Update Applications* and click **New**. The Update Applications Wizard appears.

![Update Applications Wizard](image)

2. In the **From school** field, select the school associated with the applications you want to update.
3. In the **Status** field, you can select an updated status for the application records.
4. In the **Status date** field, you can enter a date for the new status. In the **Status reason** field, you can enter a reason for the new status.
5. To update the **Current grade** field on the applicant record, mark **Set current grade**. You can update the current grade based on a promotion schedule or enter the grade value.

   If you choose “Based on promotion schedule”, select a promotion schedule in the **Promotion schedule** field. Enter a value in the **Current grade if blank** field if you want to update blank Current grade fields on the applications included in the process.
If you choose “To value”, select a value in the **Current grade** field. To overwrite the existing value, mark the **Overwrite existing current grade** checkbox.

6. To create a query of the applicant records that processed unsuccessfully and have an active application, mark **Create exception query**.

**Note:** Records that receive warnings are not included in the exception query. A warning indicates the record processed successfully but may not have been fully updated.

7. To create a query of the applicant records that are updated when you run the wizard, mark **Create query of applicants with changes**.

8. To print a report of the applicant records that are updated, mark **Print a control report on** and select a printer.

9. Click **Next**. The Additional Information tab appears.

10. In the **Year apply** field, select the academic year for which the applicant(s) is applying.

**Note:** The fields on the Additional Information tab are optional.

11. In the **Term apply** field, select the term for which the applicant(s) is applying.

12. In the **Recruiter** field, enter the applicant’s recruiter. You can click the binoculars to access a list of faculty/staff records.

13. In the **Application date** field, enter the date of the application.

14. In the **Date accepted** field, enter the date the application was accepted.

**Note:** If you select “Today” in the date fields and save the parameters to run this wizard again, you do not have to update these fields each time you run the saved wizard.

15. In the **Date enrolled from** field, enter the date the applicant will be enrolled in the school.

16. In the **Class of** field, enter the expected graduation year.

17. In the **Board type** field, select the type of boarding the student will need.

18. If you have only **Admissions Office** and **Student Billing** installed (no **Registrar’s Office**), the **Enroll applicants as students** checkbox appears. Mark this option to convert applicant records to student records.
19. Click **Next**. The Checklist/Action tab appears.

![Update Applications Wizard](image)

20. In the **Delete** frame, you can mark **Tracks** or **Checklist items** to delete specified tracks and checklist items associated with the application.

21. In the **Add** frame, you can mark **Action** or **Tracks and checklist items** to add specified actions, tracks, and checklist items to the application.

   To add action information, click **Action Information**. To add tracks and checklist items, click **Checklist Item Information**. For more information about adding actions, tracks, and checklist items, see the *Records Guide for Admissions Office*.

22. Click **Next**. The Filters tab appears.

![Update Applications Wizard](image)

23. In the filters grid, you can filter the applicant information you want to process. For example, you can process one applicant or a group of applicants. For more information about filtering, see the *Program Basics Guide*. 
24. To view a list of records included in the update, click **Preview Included Records**.

25. Click **Preprocessing Report** if you want to preview a report of changes to records before running the wizard.

**Tip:** To provide consistency to your application process, you can create and save multiple sets of parameters. For example, you might create a set of parameters to accept applicants and one to deny applicants.

26. Click **Run Now** to run the Update Applications wizard. The Save Update Applications Wizard as screen appears.

![Save Update Applications Wizard as](image)

27. In the **Name** field, enter a name for your grouping of records. In the **Description** field, you can enter a description that will help you or other users identify the grouping later.

28. To allow other users to run or change the wizard with the parameters you have set up, mark **Others can run** or **Others can modify**.

29. Click **Save** to save your parameters. A confirmation message appears. Click **Yes** to run the wizard.

30. When the wizard is complete, a control report appears. Once you have reviewed the report, click the red **X** to return to the Update Application wizard.

31. Click **Save and Close** to return to the Status Wizards page.

### Enrolling Applications

**Note:** Security rights for the Status Wizards are set in **Administration**.

With the Enroll Applications Wizard, you can create enrollments from existing applications and prepare student records for scheduling. Student records will be created from applicant records.

Using the Enroll Applications Wizard, you might also enroll a student who had to reapply after withdrawing from the school.

**Warning:** With the Enroll Applications Wizard, you can update and process multiple records at one time. We recommend creating a valid backup before running the wizard.

You can access the Enroll Applications Wizard from **Administration** or from the applicant record.
Enrolling applications

1. From the Status Wizards page in Administration, select Enroll Applications and click New. The Enroll Applications Wizard appears.

2. In the From school field, select the school associated with the applications you want to enroll.
3. In the Status field, you can select a status to update the application records you are enrolling.
4. In the Status date field, you can enter the date of the current status. In the Status reason field, you can enter a reason for the current status.
5. In the Academic year field, select the year in which to enroll the applicants as students.

**Warning:** To view the Set board type field for field, you must have the optional module Residence Life.

6. To create residence life records, in the Set board type for field, select the session for which you want residence life records created.
7. To update the ID prefix for the students you are enrolling, mark Change applicant ID prefix to student ID prefix.
8. To create a query of the applicant records that processed unsuccessfully and have an active application, mark Create exception query.

**Note:** Records that receive warnings are not included in the exception query. A warning indicates the record processed successfully but may not have been fully updated.

9. To create a query of the records that are updated when you run the wizard, mark Create query of students with changes.
10. To print a report of the student records that are updated, mark Print a control report on and select a printer.
11. Click **Next**. The Additional Information tab appears.

12. In the **Date enrolled from** field, enter the date the student will be enrolled in the school.

   **Note:** If you select “Today” in the **Date enrolled from** field and save the parameters to run this wizard again, you do not have to update this field each time you run the saved wizard.

13. In the **Class of** field, enter the expected graduation year.

14. In the **Advisor** field, select the student’s advisor. You can click the binoculars to access a list of faculty/staff records.

15. In **Set degree information to**, you can select how to declare degree information on the student records created.
   - If you select “values from applicant record”, any degrees sought and majors of interest recorded on applicant records are added to the student records created. If this information is not on an applicant record, no degree information is declared for that student. In the **Declared on** fields, enter the date.
   - If you select “specific value”, the **Degree** and **Major** fields are enabled for you to select the degree and major to add. For example, you may want to assign a Undecided degree and major to the students. In the **Declared on** fields, enter the date.
   - If you leave the field blank, no degree information is added.

16. To specify what relation receives a student’s report card, mark **Set relationships to receive report cards** and enter the relationship type. Click the binoculars to select the available relationships. You can mark **Consider only relations that live with the student** to only consider the relations who live with the student.

17. To set a relationship to show on the student’s transcript, mark **Set first relationship to show on transcript**. Click the binoculars to select the relationship. You can mark **Consider only relations that live with the student** to only consider the relations who live with the student.
18. Click Next. The Checklist/Action tab appears.

19. In the Delete frame, you can mark Tracks or Checklist items to delete specified tracks and checklist items associated with the application.

20. In the Add frame, you can mark Action to add specified actions to the student.

To add action information, click Action Information. For more information about adding actions to students, see the Records Guide for Registrar’s Office.
21. Click **Next**. The Attributes tab appears.

22. In the first grid, you can select attributes to copy from the applicant side of the record to the student side of the record. For an applicant attribute to copy to the student side of the record in **Registrar’s Office** and **Student Billing**, the attribute must also be defined as a student attribute in **Configuration** in **Registrar’s Office** and **Student Billing**.

- In the **Attribute Type** column, select the attribute to add or update on the student side of the record.
- In the **Overwrite Existing?** column, mark the checkbox to overwrite the existing value for the attribute if the student side of the record already exists and contains the attribute.

If the attribute is defined as unique (can be used only once on a record) and you do not mark **Overwrite Existing?**, the attribute is not copied and generates an exception. If the attribute already exists on the student side of the record, but is not defined as unique and you mark **Overwrite Existing?**, a new instance of the attribute is copied but the original is not overwritten.

23. In the **Please provide values for the Registrar’s Office student required attributes** and **Please provide values for the Student Billing student required attributes** grids, you enter values for required student attributes. You can also add additional attributes to student records by selecting attributes in the **Attribute Type** column.

- In the **Description** column, select or enter a description of the attribute.
- In the **Date** column, enter a date to record when you add the attribute.
- If this attribute type is required on a student record, the program automatically marks the checkbox in the **Required** column. You cannot edit this column.
- In the **Comments** column, enter any additional comments or more detailed information about the attribute. You can enter free-form text in this column.

If you are copying a required attribute from the applicant side of the record to the student side, the copied value is used instead.

If a required value is already on the student side of the record, and the attribute is defined as unique, the attribute is not copied and generates an exception. If the attribute is not defined as unique, a new instance of the attribute is copied but the original is not overwritten.
24. Click **Next**. The Filters tab appears.

![Enroll Applications Wizard](image)

25. In the filters grid, you can filter the applicants you want to process. For example, you can enroll one applicant or a group of applicants. For more information about filtering, see the *Program Basics Guide*.

26. To view a list of records included in the update, click **Preview Included Records**. From the Records to Include screen, you can deselect records you do not want to include.

27. Click **Preprocessing Report** if you want to preview a report of changes to records before running the wizard.

**Tip:** To provide consistency to your application process, you can create and save multiple sets of parameters. For example, you might create a set of parameters to accept applicants and one to deny applicants.

28. Click **Run Now** to run the Enroll Applications wizard. The Save Enroll Applications Wizard as screen appears.

![Save Enroll Applications Wizard as](image)

29. In the **Name** field, enter a name for your grouping of records. In the **Description** field, you can enter a description that will help you or other users identify the grouping later.

30. To allow other users to run or change the wizard with the parameters you have set up, mark **Others can run** or **Others can modify**.

31. Click **Save** to save your parameters. A confirmation message appears. Click **Yes** to run the wizard.
32. When the wizard is complete, a control report appears. Once you have reviewed the report, click the red X to return to the Enroll Application wizard.

33. Click Save and Close to return to the Status Wizards page.

Marking Students for Reenrollment

**Note:** Graduating students refers to students graduating out of the school system, not a student graduating from one school to another within the school system.

With the Mark for Reenrollment wizard, you can reenroll existing students and generate student progression entries to prepare them for the next year. Reenrollment includes students being promoted to a new school within the school system, but does not include students who are graduating out of the school system.

You can access the Mark for Reenrollment wizard from Administration or from the student record. When you run the Mark for Reenrollment wizard, an applicant and application are enabled for students who have never been an applicant or have no application.

In addition, when marking students for reenrollment to create a student progression entry, the program determines a student’s year by adding credits for all enrolled courses with or without a grade entered. For example, a sophomore in the middle of spring semester is currently enrolled in 5 courses worth 3 credits each. When creating a student progression entry for the next academic year or session, the program adds the student’s total credits to the 15 credits he should earn by the end of spring semester to determine the year to which he will progress. If no year can be found based on total credits, your selection for the **When calculating a student's year**, use [ ] for those students who cannot be calculated student business rule is used. For more information about business rules, see the Configuration Guide for Registrar's Office.

**Warning:** With the Mark for Reenrollment wizard, you can update and process multiple records at one time. We recommend creating a valid backup before running the wizard.

Security rights for status wizards are set in Administration.
Marking students for reenrollment

Reenrollment includes students being promoted to a new school, but does not include students who are graduating out of the school system.

1. From the Status wizards page in Administration, select Mark for Reenrollment and click New. The Mark for Reenrollment Wizard screen appears.

2. In the From school field, select the school from which you are reenrolling the students. If you have Registrar's Office installed, in the From year field, select the year from which you are reenrolling the students. You can select “This academic year” or “Previous academic year.”

3. In the Status field, you can select a status to update the student records you are reenrolling.

4. In the Status date field, you can enter the date of the current status.

5. In the Status reason field, you can enter a reason for the current status.

6. In the To year field, select the year to which you are reenrolling the students. You can select “This academic year” or “Next academic year.”

7. To create a query of the student records that processed unsuccessfully, mark Create exception query. Records that receive warnings are not included the exception query. A warning indicates that the record processed successfully but might have something that did not get updated, such as the student progression entry or the prefix.

8. To create a query of the student records that are updated when you run the wizard, mark Create query of students with changes.

9. To print a report of the student records that are updated, mark Print a control report on [ ] and select a printer.
10. **Click Next.** The Additional Information tab appears.

![Screenshot of the Additional Information tab](image)

**Note:** If you select “Today” in the **Date enrolled from** field and save the parameters to run this wizard again, you do not have to update this field each time you run the saved wizard.

11. In the **Date enrolled from** field, enter the date the student will be reenrolled in the school.

12. In the **Class of** field, enter the expected graduation year.

13. In the **Board type** field, select the type of boarding the student will need.

**Note:** The **Advisor** field is updated only if the existing value is blank.

14. In the **When creating student progression entries** grid, you can enter the advisor to use on the new student progression entries generated. In the **Action** column for each field, select “Specific Value” or “Copy Previous”.

   - If you select “Specific Value”, enter the advisor in the **Value** column. You can click the binoculars to search for the record and if needed, select multiple advisors.
   - If you select “Copy Previous”, the value used in each student’s previous progression entry will be copied to the new progression entry.

**Warning:** To view the fields in the **Residence Life Information** frame, you must have the optional module **Residence Life**.

15. To clear residence life requests entered on applicant records, mark **Clear roommate and residence requests**.

16. To copy residence life information from one session to another, mark **Copy board type** and select the sessions to copy.

17. If you mark **Copy board type**, mark whether you also want to copy **Housing information**, **Meal plan**, and **Mailbox** data. The housing information includes the residence hall, residence, and the residence phone number.
18. Click **Next**. The Checklist/Action tab appears.

19. In the **Delete** frame, you can mark **Tracks** or **Checklist items** to delete specified tracks and checklist items associated with the applicant record(s).

20. In the **Add** frame, you can mark **Action** or **Tracks and checklist items** to add specified actions or tracks and checklist items to the student/applicant record(s).

**Note:** When you run the Mark for Reenrollment wizard, an applicant and application is enabled for students who have never been an applicant or have no application.

To add action information to the student, click **Action Information**. To add track and checklist items to the applicant, click **Checklist Item Information**. For more information about adding actions and tracks and checklist items, see the *Records Guide for Admissions Office*. 
21. Click Next. The Attributes tab appears.

22. In the first grid, you can select attributes to copy from the student side of the record to the applicant side of the record. For a student attribute to copy to the applicant side of the record in Admissions Office, the attribute must also be defined as an applicant attribute in Configuration in Admissions Office.

- In the Attribute Type column, select the attribute to add or update on the applicant side of the record.
- In the Overwrite Existing? column, mark the checkbox to overwrite the existing value for the attribute if the applicant side of the record already exists and contains the attribute.

If the attribute is defined as unique (can be used only once on a record) and you do not mark Overwrite Existing?, the attribute is not copied and generates an exception. If the attribute already exists on the applicant side of the record, but is not defined as unique and you mark Overwrite Existing?, a new instance of the attribute is copied but the original is not overwritten.

23. In the Please provide values for the Admissions Office applicant required attributes, you enter values for required applicant attributes. You can also add additional attributes to applicant records by selecting attributes in the Attribute Type column.

- In the Description column, select or enter a description of the attribute.
- In the Date column, enter a date to record when you add the attribute.
- If this attribute type is required on an applicant record, the program automatically marks the checkbox in the Required column. You cannot edit this column.
- In the Comments column, enter any additional comments or more detailed information about the attribute. You can enter free-form text in this column.

If you are copying a required attribute from the student side of the record to the applicant side, the copied value is used instead.

If a required value is already on the applicant side of the record, and the attribute is defined as unique, the attribute is not copied and generates an exception. If the attribute is not defined as unique, a new instance of the attribute is copied but the original is not overwritten.
24. Click Next. The Filters tab appears.

25. In the filters grid, you can filter the student information you want to process. For example, you can reenroll one student or a group of students. For more information about filtering, see the Program Basics Guide.

26. To view a list of records included in the update, on the action bar click Preview Included Records.

27. Click Preprocessing Report if you want to preview a report of changes to records before running the wizard.

**Tip:** To provide consistency, you can create and save multiple sets of parameters to use when you run a wizard.

28. Click Run Now to run the Mark for Reenrollment wizard. The Save Mark for Reenrollment Wizard as screen appears.

29. In the Name field, enter a name for your grouping of records. In the Description field, enter a description that will help you or other users identify the grouping later.

30. To allow other users to run or change the wizard with the parameters you have set up, mark Others can run or Others can modify.

31. Click Save to save your parameters. A confirmation message appears. Click Yes to run the wizard.

32. When the wizard is complete, a control report appears. Once you have reviewed the report, click the red X to return to the Mark for Reenrollment wizard.
33. Click **Save and Close** to return to the Status Wizards page.
Plug-Ins

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Plug-ins are specially built applet extensions of Blackbaud Student Information System. A Plug-in ‘plugs in’ to Blackbaud Student Information System, opening the door to a wide range of custom functionality. Plug-Ins can be as simple as an HTML page or a Microsoft Office document or as complicated as a multi-level ActiveX document or interactive spreadsheet. This flexible technology makes adding custom applications and extensions directly to Blackbaud Student Information System easy. Plug-Ins share the database connection and runtime code resources with Blackbaud Student Information System, making them an excellent choice for adding custom functionality without an extensive API application.

For more information about plug-ins in Blackbaud Student Information System, see:

**View Locked Records/Processes**

The Locked Record Viewer shows you database connections and record locks. You can access the Locked Record Viewer from the Plug-Ins page of any program.

- **View locked records/processes**
  1. From the Plug-Ins page, click **Locked Record Viewer**. The Locked Record Viewer screen appears.
  2. To return to the Plug-Ins page, click **Back**.

**View Database Connections**

The Database Connection Viewer shows you which users are connected to the database. You can access the Database Connection Viewer from the Plug-Ins page of any program.
View database connections

1. From the Plug-Ins page, click **Database Connection Viewer**. The Database Connection Viewer screen appears.

2. To return to the Plug-Ins page, click **Back**.

View Product Details

Using the Product Details plug-in, you can generate a text file that includes information about your product installation. For example, you can use this plug-in to find the number of user licenses your organization owns.

View product details

1. On the Plug-Ins page, click **Miscellaneous**, and then **Product Details**. The Product Details page appears.

   ![Product Details](image)

2. Click **Create**. A text file appears displaying the server name, server properties, organization name, country, serial number, database, number of users, and the programs and modules installed.

   The text file is saved automatically to the root of your hard drive (for example, C:\BBDetails7.txt).

3. When you close the text file, you return to the Product Details page.

Reset Registry

The Reset Registry plug-in resets user preferences to the default installation settings. The registry reset applies to only the workstation the plug-in is run on.

Changing registry settings incorrectly can cause serious problems that may be irreversible without reinstalling the program. You must back up your database before making any registry changes. Blackbaud is not responsible for damage resulting from incorrect use of the Reset Registry plug-in.

Reset the registry

**Warning:** We strongly recommend that you make a backup of your database before resetting the registry. For information about creating a backup, see the Database Administration Guide.
1. From the Plug-ins page, click Miscellaneous, then Reset Registry. The Reset Registry page appears.

2. To reset all options in the database, mark Current Database.

3. To reset only specific options, mark the checkbox next to the items to reset.

4. Click Delete.

5. Click Yes on the confirmation screen that appears. The items you marked to reset are removed from the list.

6. To view the changes to the database, select Exit and Sign Out and then re-open the program.

Convert Rooms to Residences

You can use the Convert Rooms to Residences utility to convert any room into a residence. This plug-in is available only if you have the Residence Life optional module.

- Convert rooms to residences
  1. From the navigation bar, select Plug-Ins. The Plug-Ins page appears.
  2. From the Plug-ins page, click Miscellaneous, then Convert Rooms to Residences. The Convert Rooms to Residences page appears.

  ![Convert Rooms to Residences](image)

  3. In the Residence Hall column, select the residence hall where the converted rooms will be located.
  4. In the Rooms to Convert column, select the query that contains the rooms you want to convert.
  5. To run the conversion, click Update. The utility converts the rooms under the Rooms to Convert column into residences within the residence hall selected in the Residence Hall column. You may encounter the following during the conversion process:

    - The utility generates an exception message for rooms linked to a schedule or listed as a resource on course records.

  ![Convert Rooms to Residences](image)

**Note:** The residence halls appearing in this column must be set up in Residence Life.
Convert Student Residence Information

You can convert residence information into attributes or new Residence Life fields. This plug-in is available only if you have the Residence Life optional module. Before running this plug-in, we recommend that you run the Convert Rooms to Residence utility so that all rooms within a residence hall are converted before the student records are processed, otherwise the Residence field on the student record is blank. For more information about the Convert Rooms to Residence utility, see “Convert Rooms to Residences” on page 102.

1. From the navigation bar, select Plug-Ins. The Plug-Ins page appears.
2. From the Plug-ins page, click Miscellaneous, then Convert Student Residence Information. The Convert Student Residence Information page appears.
3. In the Convert current residence information fields to [ ], select “Residence life information” or “Attributes”.
   - To convert Residence Life information into new residence life fields select “Residence life information”. If you select this option, go to step 4.
   - To create attributes and attach them to each student record for each field, select “Attributes”. If you select this option, the remaining fields are disabled. Click Update to run the conversion.
4. In the Academic year field, select the year that the data will be converted to, for example, “2007-08”.
5. In the Session field, select the specific session that the data will be converted to, for example, “Spring”. Only the sessions defined for the year selected in the Academic year field are available.
6. If a student has housing information entries but no board type, in the If board type is blank for students with housing information, use field, select a board type to attach to those student records missing a board type.
7. If a student has a dorm room entry but no dormitory, in the If dormitory is blank for students with a dorm room, set residence hall to field, select a residence hall to attach to those student records.
8. To overwrite a residence life record that exists for the academic year and session you selected in steps 4 and 5, mark the Overwrite existing information checkbox.
9. To run the conversion, click Update.

Note: The residence halls appearing in this field must be set up in Residence Life.
Update Progression Entries

Using the **Update Progression Entries plug-in**, you can update the school and current year fields on multiple student progression entries at once. You can run this plug-in for only one current year at a time.

- **Update progression entries**

**Warning:** We strongly recommend that you make a backup before updating progression entries. For information about creating a backup, see the *Database Administration Guide*.

1. On the Plug-Ins page, click **Miscellaneous**, and then **Update Progression Entries**. The Update Progression Entries page appears.

2. In the **Query name** field, select the query of students whose progression entries need to be updated.
3. In the **Academic year** field, select the academic year to update.
4. In the **School** field, select the school you want used for the progression entries.
5. In the **Current year** field, select the grade level to be associated with the academic year.
6. Mark the **Run plugin**, and click **Update**.
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