The Education Edge™

Records Guide for Admissions Office
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# Applicants

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In Admissions Office, an applicant is a prospective student progressing through the admissions process. You can use applicant records to enter and maintain biographical, contact, financial aid, and educational information for persons applying to your school. If you have Registrar’s Office and Student Billing, these programs work with Admissions Office so that applicant information is shared in the same database for the admissions office, registrar’s office, and billing office.

An applicant record created or deleted in Admissions Office is also created or deleted in Registrar’s Office and Student Billing if the applicant is also a student. Some applicant information, such as biographical, contact, and address information is shared across the programs so if you make changes to the record in one program, the changes appear in all programs. For a complete list of shared features, see the Integrating Student Billing with The Education Edge guide.

With applicant records, you can create relationships with other records in the program. By creating relationships, you link applicants to faculty/staff members, individuals, or other applicants. For example, you can add parents, siblings, and other persons as individual records and maintain those relationships. If you have Registrar’s Office or Student Billing, you can create relationships with students.

Applicant records are flexible. With Admissions Office, you can record each time an applicant applies to your school. You can also record applications to multiple schools. For example, if your school consists of a regular school and a music school, you can maintain separate applications to each school.

To help streamline your admissions process, you can use tools in Admissions Office to create tracks containing automatic checklist items and assignable actions that are integrated with applicant records. By using tracks, you know exactly where an applicant is in the admissions process. For more information about creating tracks and checklist items, see the Configuration Guide for Admissions Office.

Accessing Applicant Records
Because records are such an important part of Admissions Office, we have placed all record types on the Records page so you can quickly access them. Think of Records as a filing cabinet. You open a filing cabinet to pull out a record, or file. When you open Records, you can directly access several record types, including applicant records. To access applicant records, click Records on the navigation bar, then click Applicants. The Applicants page appears.

Consider the Applicants page the starting point for applicant records. From this page, you can add a new applicant or open an existing record. You can edit applicant record options by clicking Edit options for Applicants. For more information about options, see the Options chapter in the Program Basics Guide.

To save time when searching for a specific record, you can use the Search for an Applicant by Applicant name field. The Applicants page lists recently accessed records. You can open a record in the list by clicking the applicant’s name.

Finding and Opening Applicant Records

**Note:** For more information about filtering criteria on the Open screen, see the Program Basics chapter of the Program Basics Guide.

When you click Open an Applicant on the Applicants page, the Open screen for applicants appears. The Open screen has a number of filters you can use to narrow your search and quickly locate the record you want to open. The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results.

You can use wildcard characters if you are not sure how a word is spelled — use a question mark to replace a single character and an asterisk to replace a series of characters. For more information about wildcards, see the Query Guide for The Education Edge.

- Opening an applicant record

**Note:** You can access the Open screen by selecting File, Open from Records.

2. Click Applicants. The Applicants page appears.
3. Click **Open an Applicant**. The Open screen for applicants appears.

![Open screen](image)

**Note:** For more information about filtering criteria on the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

4. In the **Find Applicants that meet these criteria** frame, enter criteria you are using to search for the applicant.

5. After you enter search criteria, click **Find Now**. The program searches the database and displays all records meeting your criteria.

6. In the grid, select the applicant record to open.
Note: To clear the search criteria so you can change the scope of your search, click **Clear Filters**.

7. Click **Open**. The applicant record appears.

![Applicant Record Screenshot](image)

8. To save the record and return to the Applicants page, click **Save and Close**.

### Managing Biographical Information

**Note**: You can set business rules for applicants in **Configuration**. For more information about business rules, see the **Program Basics Guide**.

Applicant records are comprised of multiple tabs that store specific information about people applying for entrance to your school. When you initially add an applicant record, you enter biographical information about the applicant. As the person moves through the admissions process, you access the record and enter additional information, including test scores, application dates, and general comments.

### Adding Applicant Records

**Note**: We recommend you have a firm understanding of your school’s application processes, including status progression, before adding applicants.

On the Bio 1 tab of an applicant record, you enter biographical information that includes name, gender, address, and phone numbers. The Bio 1 tab displays application information, including the school and grade for which the prospect is applying. More detailed information about the applicant’s actual applications is stored on the Applications tab. To edit an existing applicant record, open the record, make your changes, and save the record. For more information about opening applicant records, see “Finding and Opening Applicant Records” on page 3.
Before adding a new applicant record, consider whether you can get a head start by copying applicant information or converting an individual record from a record already in the program. For more information, see “Copying Applicant Information” on page 11 and “Converting Individual Records” on page 166.

When you enter name information in the name grid on the Bio 1 tab, you are in Edit mode. While in this mode, you can enter an applicant’s name, title and suffix.

When you enter name information in the name grid on the Bio 1 tab, you are in Edit mode. While in this mode, you can enter an applicant’s name, title and suffix.

Once you enter the name information, click OK on the right side of the grid to access View mode.

View mode provides a clear and easy-to-read view of the applicant’s name. To change the name, click Edit or double-click the applicant’s name to access edit mode again.
If you enter common values repeatedly for multiple applicant records, you can create a default set with common values to save time during data entry. The values are defaults only and you can change default information in the fields at any time. You can load default sets on an applicant record by selecting **Applicant, Load Defaults from** on the menu bar. For more information about default sets, see the Program Basics chapter of the *Program Basics Guide*.

**Note:** You can set a rule to automatically check for duplicate applicants and specify duplicate applicant criteria in business rules in *Configuration*. For more information about business rules, see the *Configuration Guide for Admissions Office*.

To prevent entering duplicate applicant records, you can specify duplicate search criteria in *Configuration*. We strongly recommend that you set the business rule to check for duplicate applicants automatically. To search for a duplicate record from an existing record, access the menu bar and select **Applicant, Duplicate Search**. For more information about business rules, see the *Configuration Guide for Admissions Office*.

- **Adding an applicant record**

  Some biographical information on an applicant record in *Admissions Office* is shared with the student record in *Registrar’s Office* and *Student Billing*. If you make changes to the record in one program, the changes appear in all programs.

  **Tip:** Before adding a new applicant record, consider whether you can get a head start by copying applicant information or converting an individual from a record already in the program. For more information, see “Copying Applicant Information” on page 11 and “Converting Individual Records” on page 166.

**Note:** If you have only *Admissions Office*, some tabs and selections shown here may not appear on the applicant record.

On the Bio 2 tab, you can record birth information, in-state residency status, recruiting specifics, as well as other schools to which the prospect is applying.
1. On the Applicants page, click **Add a New Applicant**. The New Applicant screen appears.

![New Applicant Screen](image)

2. In the name grid, enter the applicant’s full name. Once you enter the name, click **OK** to exit Edit mode in the name grid and enter View mode.

**Tip:** You can press **F3** to enter the applicant’s first name in the **Nickname** field.

3. In the **Nickname** field, enter the applicant’s nickname or the name he prefers to be called.

4. In the **Applicant ID** field, enter the applicant’s identification number.

   If the business rule to automatically generate applicant IDs is marked in **Configuration**, the program automatically generates the ID when you save the record. Applicant IDs must be unique. For more information about business rules, see the **Configuration Guide for Admissions Office**.

5. In the **Gender** field, select the applicant’s gender.

   **Note:** You must have the appropriate security rights to view, add, delete, edit, or output Social Security numbers. If you do not have rights, these numbers are masked. For more information, see the Security chapter of the **Administration Guide for The Education Edge**.

6. In the **SSN** field, enter the applicant’s Social Security Number. The field automatically formats to the standard Social Security Number format of ###-##-#### when you enter nine characters. You can enter up to 18 alphanumeric characters. This field must be unique.

7. In the **Current grade** field, select the applicant’s current grade.

8. In the **Inquiry date** field, enter the date the applicant made an initial inquiry to the school.

9. In the **School apply** field, select the school to which the applicant is applying. This selection will appear in the **School apply** field of the Applications tab when viewing the active application. This field appears only if multiple schools are defined in **Configuration**. For more information about defining multiple schools, see the **Configuration Guide for Admissions Office**.

10. In the **Grade apply** field, select the grade to which the applicant is applying. This selection will appear in the **Grade apply** field of the Applications tab when viewing the active application.
11. In the **Year apply** field, select the academic year for which the applicant is applying.

12. In the **Application type** field, select the application type for which the applicant is applying. Application types are defined on the Tables page in *Configuration*. For example, you can mark an applicant as early action, early decision, or regular decision.

13. In the **Current status** field, select the applicant’s status. This selection appears in the **Current status** field of the Applications tab when viewing the active application. If tracks are defined in *Configuration*, selecting a status can add a track to the applicant record.

14. In the **Status date** field, enter the date of the current status. This date appears in the **Status date** field of the Enrollments tab.

15. In the **Status reason** field, enter a reason for the current status. This information appears in the **Status reason** field of the Enrollments tab.

**Note:** The address entered on the Bio 1 tab becomes the primary address by default. You can change the primary address designation on the Addresses tab.

16. In the **Address**, **Country**, **City**, **State**, and **ZIP** fields, enter the applicant’s address. To enter additional details about this address or to copy and link addresses, click **Address**. For more information about addresses, see “Adding Addresses” on page 12.

17. In the contact grid, in the **Contact Type** column, select a contact method. In the **Contact Number** column, enter a phone number or Web or email address.

The **Link** column indicates whether the information is linked to another record in the database. If you copy and link the applicant’s address, you can select “Shared” or “Not Shared”. If the information is not linked to another record, the column defaults to “Not Shared” and is for informational purposes only. For more information about linking addresses and contact information, see “Copying and Linking Addresses” on page 15.

18. To prevent the applicant from receiving emails from *NetMail* or *Faculty Access for the Web*, mark **Requests no email**. This applies to all email addresses on the applicant’s record.

If an applicant receives an email from *NetMail* or *Faculty Access for the Web*, a **Click here if you do not want to receive further email** link appears on the email. If the applicant clicks this link, then clicks a **Remove** button to stop receiving emails from your school, a *NetMail* user can download and import this information to automatically mark the **Requests no email** checkbox on the applicant’s record.

19. To add visa and passport information, click **Visa/Passport**. For information, see “Adding Visa/Passport Information” on page 20.

20. To add demographic information about the applicant, click **Demographics**. For more information, see “Adding Demographic Information” on page 21.

**Note:** Be aware that changing some fields on the Bio 1 tab can change fields on the applicant’s active application. For more information about applications, see “Adding Applications” on page 24.
21. To continue adding biographical information, select the Bio 2 tab.

22. If the applicant lives in your state, mark **In-state resident**. When you mark the checkbox, the **years**, **months**, and **county** fields become available so you can enter the length of time the applicant has been a resident and the county of residence.

**Note:** The program determines an applicant’s age by a business rule setting in Configuration. For more information about business rules, see the *Configuration Guide for Admissions Office*.

23. If the applicant will ride a bus to school, in the **Transportation** frame, in the **Bus Route** field, select the applicant’s bus route.

24. In the **District** field, select the school district.

25. In the **Birth Information** frame, in the **Birth date** field, enter the applicant’s birth date. The program calculates and enters the age in the **Age** field.

26. If an applicant passes away, mark the **Deceased?** checkbox. The **Age** field disappears and the applicant no longer appears in your mailings.

27. In the **Country**, **City**, and **State** fields, enter or select the location the applicant was born.

**Note:** You must have the optional module *Residence Life* to see all the fields in the **Housing Requests** frame.

28. In the **Housing Requests** frame, in the **Residence hall** field, select the residence hall where the applicant requests to reside.

29. In the **Residence** field, click the binoculars to select the applicant’s residence. After you select the residence, you can click the magnifying glass to open the residence.

30. In the **Roommates** field, click the binoculars to select the roommate’s name. If the residence you select allows more than one roommate, you can select multiple roommates.

31. To request a private room for the applicant, mark the **Private room** checkbox.

32. In the **Recruiting Information** frame, in the **Source** field, select how the applicant learned about your school, for example, “Open House” or “Mailing”.

33. In the **Contact Method** field, select how the applicant first contacted your school, for example, “Telephone Call” or “Conversation with current student”.

34. To record other schools to which the applicant has applied, complete the **Other Schools Applied To** grid. In the **Other School** column, enter each school to which the applicant has applied.

35. In the **Preference** column, to specify which school is the first choice, enter “1”. To note the second choice, enter “2” and continue with the remaining schools.

**Note:** The Type column defaults from the selected organization record and is for informational purposes only.

36. To specify where the applicant is currently enrolled, mark the checkbox in the **Attending** column of the school. You can mark only one row in the grid.

37. In the **Comments** column, enter any additional information.

38. Click **Save and Close**. The program saves the record, and you return to the Applicants page.

### Copying Applicant Information

To save time when adding records, you can copy information to a new applicant record from an existing applicant record. If you have **Registrar’s Office** or **Student Billing**, you can copy from student records.

Before adding a new applicant record, consider whether you can get a head start by copying applicant information from a record already in the program. For example, a family may have several children applying.

For improved efficiency when copying applicant records, you can copy relationships and addresses for the applicant. If you copy relationships, the program creates a relationship between the new record and the copied record.

- **Copying applicant information**
  1. On the Applicants page, click **Copy Student/Applicant Information**. The Copy Student/Applicant Information screen appears.
  2. In the **Copy information from** field, click the binoculars to search for and select an applicant from which to copy.
  3. In the **Record type to create** field, select whether to create an applicant or student record. This field appears only if you have **Registrar’s Office**.
4. In the **The new record is a [ ] of the copied record**, select how the new record relates to the record to be copied.

5. In the **The copied record is a [ ] of the new record** fields, select how the record to be copied relates to the new record.

6. To copy addresses, leave **Addresses** marked. To copy relationships, leave **Relationships** marked.

7. To create the record, click **Create Now**. The program creates and opens the New screen for an applicant record.

8. Verify the information is correct and continue adding the applicant’s information until the record is complete. For more information, see “Adding an applicant record” on page 7.

**Adding Addresses**

**Tip:** You can print a label or envelope directly from an applicant record using the button on the toolbar. For more information about formatting labels or envelopes, see the **Mail Guide**.

On the Addresses tab, you can add and maintain multiple addresses for applicant records. Each record has one primary address, which you designate on the Addresses tab. The primary address appears on the Bio 1 tab. You can maintain additional addresses on the Addresses tab.

You can add an address on the Bio 1 or the Addresses tab. When you add an address on the Bio 1 tab, it automatically becomes the primary address for the record. When you add an address on the Addresses tab, you can designate the address as primary or leave it as an alternate or secondary address.

Addresses on an applicant record in **Admissions Office** are shared with the student record in **Registrar’s Office** and **Student Billing**. If you make changes to the record in one program, the changes appear in all programs.

- **Adding an address**

  **Note:** To edit an existing address, select the address in the grid and click **Open** on the action bar. When you make your changes, the program updates the addresses on the open record and on the linked records.
1. From an open applicant record, select the Addresses tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

![Image of the Address screen]

**Note:** You can also access the Address screen by clicking Address on the Bio 1 tab.

2. On the action bar, click **New Address**. The Address screen appears.

![Image of the New Address screen]

**Note:** You can use the address types to specify how an address is used. For example, you can create an “Application forms” address type for addresses that are used only for mailing applications.

3. In the **Address type** field, select the type of address. Address types are defined in Configuration.

4. In the **Country** field, select the country of the address.
5. In the Address box and the City, State, and ZIP fields, enter the address.

6. In the contact grid, in the Contact Type column, select a contact method. In the Contact Number column, enter a phone number or Web or email address.

   The Link column indicates whether the information is linked to another record in the database. If you copy and link the applicant’s address, you can select “Shared” or “Not Shared”. If the information is not linked to another record, the column defaults to “Not Shared” and is for informational purposes only. For more information about linking addresses and contact information, see “Copying and linking an address” on page 15.

7. If you do not want the address block that prints linked with the individual address fields, unmark Synchronize with individual address fields. If you unmark this checkbox, you must manually update the printed address in the Address as it will be printed box.

8. Select the Details tab.

9. In the Description field, enter a description for the address.

10. In the County and Region fields, select address information. Selections for these fields are defined in Configuration.

11. In the CART field, enter the carrier route.

12. If this is the primary address, mark Primary address. If only one address appears on the record, the program automatically marks the checkbox, and you cannot unmark it. Each record can have only one primary address.

13. In the This is a valid address from [ ] to [ ] fields, enter the dates for which this is a valid address.

14. If the address is seasonal, mark This is a seasonal address from [ ] to [ ] and enter the dates.
15. To add attributes to the address, select the Attributes tab. With address attributes, you can add any additional information you need to maintain about this particular address, such as special mailing instructions.

![Address for Jennifer Bailey](image)

16. In the **Send [ ] to this address** field, select “All mail”, “Selected mail”, or “No mail”. If you select “All mail” or “No mail”, you cannot add attributes to the address. For more information about entering attributes, see “Adding Attributes” on page 46.

17. To save the address and return to the Addresses tab, click **OK**. The new address appears in the grid.

### Copying and Linking Addresses

To help eliminate data entry errors, you can either copy or copy and link an address to an applicant record from another record. When you copy an address, you are merely pasting a separate copy of the address directly from a record onto the applicant record. Changes to the address on one record are not made to the other record, or vice versa.

**Note:** To edit an existing linked address, you can open only one record, make your changes, and the program updates the addresses on the linked records.

When you copy and link an address, you are inserting a copy of the address that is still tied to the original address. Changes you make to the address on either record are made automatically to the other record.

- **Copying and linking an address**

  **Note:** While this procedure demonstrates copying and linking an applicant address to another applicant, you can use it as a model for copying and linking addresses to other record types.
1. From an open applicant record, select the Addresses tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. Select the Home address and click Open on the action bar. The Address screen appears.

3. To copy the address from another applicant record, click Copy Address From. The Open screen appears. Locate the record and click Open. For more information about using the Open screen to search for records, see the Program Basics chapter of the Program Basics Guide.
The Addresses screen appears.

4. In the Copy? column, mark the checkbox for each address to copy.
5. To link the addresses, mark **Link these addresses**.

**Note:** When you link addresses, information is shared. A contact type marked “Not Shared” in the Link? column cannot be copied or linked.

6. To copy the address onto the record, click **Copy Now**. You return to the Address screen, and the copied address information appears. The Link? column indicates contact types are linked.

7. To save the information and return to the Addresses tab, click **OK**.

### Unlinking Addresses

You may find it necessary to unlink addresses. When you stop sharing a linked address, you remove links between the records. Changes you make to the address on either record are no longer made automatically to the other record. Each address still has the potential to be shared.

To unlink only a contact type, select “Not Shared” in the **Linked?** column.

- **Unlinking an address**
  1. From an open applicant record, select the Addresses tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
2. Select the address to unlink and click **Open**. The Address screen appears.

3. Click **Shared Addresses**. The Shared Addresses screen appears displaying the records the address is linked to.

4. Click **Stop Sharing This Address**. The applicant’s address is no longer linked to the others.

5. To return to the Address screen, click **Close**. The address still appears but is no longer linked.

6. To save the new information and return to the Addresses tab, click **OK**.

**Managing Addressees and Salutations**

**Note:** An addressee is a name as it appears on labels, reports, and letters. A salutation is the greeting used in letters and other mailings. For more information about creating addressees and salutations, see the *Configuration Guide for Admissions Office*. 

**Note:** When you stop sharing an address, the link is broken between only the applicant and the records listed on the Shared Addresses screen. If the records listed have addresses linked to each other, those links are not broken.
On the Addressees/Salutations tab of an applicant record, you can select the primary addressee to appear on labels, envelopes, and letters. Formats for addressees and salutations are defined in *Configuration*. To maintain consistency in your data entry, we recommend you select predefined addressees and salutations.

An addressee is usually formal, such as Ms. Leena Gamble. A salutation, on the other hand, is how you greet an applicant in correspondence. Depending on the type of mailing, you may use a formal or informal salutation. For example, you may use Ms. Gamble on a letter about financial aid to or Leena on a letter about an open house. The more addressees and salutations you maintain for your applicants, the more flexibility you have in addressing and greeting them.

Because addressees and salutations are shared across *Admissions Office*, *Registrar’s Office*, and *Student Billing*, you should be careful which addressee and salutation you make primary. We recommend that you assign a general primary addressee and salutation that is appropriate for use in all the programs. We also recommend that you add special types to the *Addr/Sal Type* table for addressees and salutations you need for specific purposes. For example, you can add an “Application form” type that you use only on applications. For more information about adding addressee and salutation types, see “Adding an additional addressee/salutation” on page 20.

### Assigning a primary addressee and salutation

**Note:** To maintain consistency, we recommend selecting predefined addressees and salutations.

1. From an open applicant record, select the Addressees/Salutations tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. In the **Primary addressee** field, select the addressee format to appear on labels, envelopes, and letters. Because addressees and salutations are shared across *Admissions Office*, *Registrar’s Office*, and *Student Billing*, we recommend that you assign a general primary addressee and salutation that is appropriate for use in all of the programs.
3. In the **Primary salutation** field, select the salutation format to appear on mailings.

![Image of applicant record with salutation field](image)

4. To save the addressee and salutation, click the **Save** button on the toolbar.

- **Adding an additional addressee/salutation**

  1. From an open applicant record, select the Addressees/Salutations tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3

  ![Image of applicant record with addressee/salutation tab](image)

  2. In the **Type** column, select a type of addressee or salutation. You can also add a new type by entering it in the **Type** column. The new type is added to the **Addr/Sal Type** table in **Configuration**.

  3. In the **Address/Salutation** column, enter or select the name as it should appear on reports and mailings when using this addressee/salutation.

  To maintain consistency, we recommend selecting predefined addressee and salutation formats. Addressee and salutation formats are defined in **Configuration**. For more information about defining addressees and salutations, see the **Configuration Guide for Admissions Office**.

  4. To save the addressee/salutation, click the **Save** button on the toolbar.

**Adding Visa/Passport Information**

With applicant records, you can record and maintain visa and passport information, which is especially useful for potential exchange students or if your school is not located in the United States.
Adding visa/passport information

Note: To edit existing visa/passport information, open the applicant record, make your changes, and save the record. For more information, see “Finding and Opening Applicant Records” on page 3.

1. On the Bio 1 tab of an open applicant record, click Visa/Passport. The Visa/Passport information screen for the selected applicant appears. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

   ![Visa/Passport information screen](image)

   *Visa/Passport information for Jennifer Bailey*

   - Visa status:
   - Visa number:
   - Visa issued:
   - Passport number:
   - Visa type:
   - Visa box:
   - Visa expires:
   - Passport expires:

   Press F7 for table lookup

Note: Selections in the Visa status and Visa type fields are defined in Configuration.

2. In the Visa status field, select the status of the applicant’s visa.
3. In the Visa number and Visa type fields, enter the number of the visa and select the type of visa the applicant has.
4. In the Visa issued and Visa expires fields, enter the issue and expiration dates of the visa.
5. In the Passport number and Passport expires fields, enter the number and expiration date of the passport.
6. To save the information and return to the Bio 1 tab, click OK.

Adding Demographic Information

Glossary: Demographics are the characteristics of human populations. In Admissions Office, you can follow the demographics of your school and use the information for queries and reports.

With applicant records, you can record the demographics of your prospective students. By maintaining demographic information, you can create queries and reports that provide both specific and broad information about the applicant pool. For example, some schools report on religion and ethnicity to better understand and gauge the diversity of the applicant pool.

Adding demographic information

Note: To edit existing demographic information, open the applicant record, make your changes, and save the record. For more information, see “Finding and Opening Applicant Records” on page 3.
1. On the Bio 1 tab of an open applicant record, click **Demographics**. The Demographic information screen appears. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

![Demographic Information Screen](image)

2. In the **Is Hispanic/Latino** field, select “Yes” or “No”.

3. In the **Ethnicity** field, click the binoculars to access a Selected Ethnicities screen. From this screen, select one or multiple ethnicities for the applicant.

![Selected Ethnicities Screen](image)

When integrating, the **Ethnicity** field in *The Raiser’s Edge* synchronizes with the first ethnicity value listed in the **Ethnicity** field in *The Education Edge*. Note that if the second value listed in the **Ethnicity** field in *The Education Edge* matches the **Ethnicity** field in *The Raiser’s Edge*, the second value will be deleted.

4. Click **OK**. You return to the Demographic information screen.

5. In the **Religion** and **Church affiliation** fields, select the applicant’s religion and church affiliation.

![Religion and Church Affiliation Fields](image)

6. In the **Citizenship** field, select the country of which the applicant is a citizen.

7. In the **First language** and **Language spoken at home** fields, select the first language spoken by the applicant, as well as the language spoken at home.

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**Note:** You can set a business rule in **Configuration** to display marital status and maiden name on the Demographic information screen. For more information about business rules, see the **Configuration Guide for Admissions Office**.
8. In the **Years in US** field, enter the number of years the applicant has resided in the United States.

9. In the **Height** and **Weight** fields, enter the applicant’s height and weight.

10. In the **Marital status** and **Maiden name** fields, select the applicant’s marital status and enter a maiden name, if applicable.

11. To save the information and return to the applicant record, click **OK**.

### Adding Photos

You can add a photo to an applicant record. If you have *Registrar’s Office* or *Student Billing*, the photo is shared with the student view of the applicant record.

- **Adding a photo**
  1. On the toolbar of an open applicant record, click the **Photo** button. The photo screen appears. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
  2. To add a photo, click **Change Picture**. The Open screen appears so you can locate and select the photograph.
  3. When you locate the photo, select it and click **Open**. You return to the photo screen, and the selected photo appears.

  **Note:** To remove the picture, click **Remove Picture**.

  4. To size the photo to fit in the window, mark **Size to fit window**.
  5. To save the photo and return to the applicant record, click **OK**.

### Managing Applications

**Note:** If you have *Registrar’s Office* or *Student Billing*, and the applicant has a student record, you can select **Applicant, Switch view, Student (Registrar’s Office)** or **Student (Student Billing)** from the menu bar to view the student record in those programs. To return to the applicant record, from the menu bar, select **Student, Switch view, Applicant (Admissions Office).**
In Admission Office, you add applications to applicant records and update the applications as the prospective student moves through the admissions process. Once an application is entered, to keep the records current, you update the application status manually or by using the Update Applications wizard. For more information about the Update Applications wizard, see the Status Wizards chapter of the Administration Guide for The Education Edge. You can view a history of status changes for any applicant by viewing the status log.

Adding Applications

On the Applications tab, you maintain information about applications, including current status, status reason, as well as the school and grade to which the applicant is applying. If an applicant has applied to your school multiple times, you can record each application. You can also record applications to multiple schools. For example, if your school has a regular school and a music school, you can manage applications separately for each school.

The program automatically generates an application from the information entered on the Bio 1 tab, and this becomes the active application by default. An applicant can have only one active application at a time.

The active application shares information with the Bio 1 tab. Be aware that if you change information in the fields on the Applications tab, including marking a different active application, information changes on the Bio 1 tab.

Schools can have only one active application. If an applicant has applied to a school before, we recommend you mark the previous application inactive.

- Adding an application
  1. From an open applicant record, select the Applications tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
2. To add an application, click **New Application**. The New Application screen appears.

![New Application for Jennifer Brody](image)

3. In the **Application date** field, enter the date of the application. Changing the date in this field for the active application changes the date in the **Application date** field on the applicant’s Bio 1 tab.

4. In the **School apply** field, select the school to which the applicant is applying. Changing the school in this field for the active application changes the school in the **School apply** field on the applicant’s Bio 1 tab. The **School apply** field appears only if you have defined multiple schools.

**Note:** If you change information on the active application, information on the applicant’s Bio 1 tab can change.

5. In the **Year apply** field, select the academic year for which the applicant is applying for admission. Changing the year in this field for the active application changes the year in the **Year apply** field on the applicant’s Bio 1 tab.

6. In the **Grade apply** field, select the grade for which the applicant is applying for admission. Changing the grade in this field for the active application changes the grade in the **Grade apply** field on the applicant’s Bio 1 tab.

7. In the **Term apply** field, select the term for which the applicant is applying.

8. If the applicant is accepted, you can enter the date accepted in the **Date accepted** field.

9. In the **Application type** field, select the application type for which the applicant is applying. Application types are defined on the Tables page in **Configuration**. For example, you can mark an applicant as early action, early decision, or regular decision.

10. In the **Board type apply** field, select the type of boarding the applicant will need.

11. In the **Recruiter** field, select the applicant’s recruiter. This person must have a faculty/staff record in the program with the **Current recruiter** checkbox marked.

12. Once an applicant enrolls, enter the date and grade information in the **Date enrolled from** and **Grade enrolled** fields. If you have **Registrar’s Office** or **Student Billing**, this information is entered on the student record and shared with the applicant record.

13. Once an applicant enrolls, enter the proposed graduation information in the **Graduation date** and **Class of** fields. If you have **Registrar’s Office** or **Student Billing**, this information is entered on the student record and shared with the applicant record. The appearance of the **Class of** field is determined by a business rule in **Configuration**. For more information about business rules, see the **Configuration Guide for Admissions Office**.
14. If an applicant enrolls and then leaves your school, enter the grade and reason information in the Grade left and Reason left fields. If you have Registrar’s Office or Student Billing, this information is entered on the student record and shared with the applicant record.

15. In the Current status field, select the current status of the applicant. Be aware that changing the value of this field for the active application changes the value of the Current status field on the applicant’s Bio 1 tab.

**Note:** Entries in the Current status, Status date, and Status reason fields add an entry to the applicant’s status log. For more information, see “Viewing and Printing the Status Log” on page 27.

16. In the Status date field, enter the date of the applicant’s current status. Changing the value of this field for the active application changes the value of the Status date field on the Bio 1 tab. You can set a business rule to update the status date when the current status is changed. For more information about business rules, see the Configuration Guide for Admissions Office.

17. In the Status reason field, enter the reason for the applicant’s current status. Changing the value of this field for the active application changes the value of the Status reason field on the Bio 1 tab.

**Note:** The Region table in Configuration populates the Region field on the Details tab for the applicant address as well as the Geographic market field on the Applications tab of an applicant record.

18. In the Geographic market field, select the geographic region or market you want to associate with this applicant. The selections in this field are set in the Region table of Configuration.

When you create recruiter calculations in Configuration, use the Geographic market field to associate a recruiter with a specific geographic market. Applicants are then assigned to that recruiter based on the applicant’s geographic market. For more information about recruiter calculations, see the Configuration Guide for Admissions Office.

19. To save the record and return to the Applicants page, click Save and Close.

- **Making an application active**
  - Each school can have only one active application. All other applications are inactive.
  - 1. From an open applicant record, select the Applications tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
  - 2. In the All Applications grid, find the application to make active and mark the checkbox in the Active Applications column.
  - 3. To save the record and return to the Applicants page, click Save and Close.

### Updating Application Status

**Glossary:** Status indicates where an applicant or student is in the admissions or enrollment process.

Once an application is entered, you adjust the status on the applicant record as the admissions process progresses. For example, you can accept or deny applicants by updating the status. It is essential that you update the status to reflect the current state of an application. You can update the status manually, by adding tracks, by adding actions, or by using the Update Applications wizard.

To manually update an application status, you open the applicant record and select a new status. You can change the status of the active application on the Bio 1 tab or the Applications tab. Manually updating is useful when changing the status of a single applicant.

To automate the process of updating the status of multiple applicants, you can use the Update Applications wizard. With the Update Applications wizard, you can accept or deny applicants and create new applications for existing applicants. You access the wizard in Administration or on the Applicants page. For more information about the Update Applications wizard, see the Status Wizards chapter of the Administration Guide for The Education Edge.
Updating active application status

1. From an open applicant record, select the Applications tab. The active application appears. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. To update the status of an inactive application, access the All Applications grid, select the application to update, and click Open.

3. In the Current status field, select the updated status. You can enter a date and reason in the Status date and Status reason fields. If you are updating status of an inactive application, click OK to return to the Applications tab.

4. To save the record and return to the Applicants page, click Save and Close.

Viewing and Printing the Status Log

The status log displays status changes for applicants, including how, when, and why a status was changed and who changed it. The program adds an entry to the status log any time you:

- Create or edit an applicant record
- Process applicant records with any of the status wizards
- Complete an action on an applicant record
- Complete a track or checklist item on an applicant record
- Add or change applicant records globally
- Load defaults on an applicant record

The status log maintains a history of each applicant’s status changes. For example, with the status log, you can confirm all steps were completed in the admissions process, quickly check the status changes and reasons when a parent or applicant calls about an application, and print a report on application trends.

The status log records saved changes to the Current status, Status date, and Status reason fields on the application record.

An asterisk in the grid indicates the current status of an applicant. A row of bold text indicates the active application. A status log can have only one current active status. The current active status corresponds to the status on the active application. You cannot delete statuses in bold face or with an asterisk.

Viewing a status log

1. From an open applicant record, select Applicant, Status Log The Status Log for screen for the selected applicant appears. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

![Status Log for Jennifer Bailey]

Note: To open the current application, select a row in the grid and then select Go to Application.
2. To filter the applications and schools appearing on the status log, make selections in the fields on the action bar.

3. To sort the information in a column, click a column heading.
   To delete a status, select a row in the grid and click **Delete**.

4. To open the current application, select any status in the grid. Right-click and select **Go to Application**. The status log closes and the Applications tab appears. For more information about applications, see “Adding Applications” on page 24.

5. To return to the applicant record, click **OK**.

Printing a status log

1. From an open applicant record, select **Applicant, Status Log**. The Status Log screen for the selected applicant appears. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

   **Note:** If you do not have a parameter file defined, click **Add New** to create one. For more information about the Applicant Status Report, see the Applicant Reports chapter of the *Reports Guide for Admissions Office*.

2. On the action bar, click **Print**. The Select a Parameter File screen appears.

3. Select a saved parameter file to print the status log automatically using saved parameters or click **Add New** to create a file.

   If you click **Add New**, the New Applicant Status Report screen opens on the General tab.

4. Create the report parameters by making selections and entering information on each tab. For more information about setting up report parameters, see the Reports Basics chapter of the *Reports Guide for Admissions Office*.

5. Click **Print** to print the report.

6. Click **Save** to save the report. The Save Report as screen appears.

7. Enter a name in the **Report name** field and a description of the report in the **Description** field.

8. Click **Save**. You return to the Applicant Status Report screen.

9. Close the Applicant Status Report screen to return to the Select a Parameter File screen. The new report parameter file appears in the list.

10. Close the Select a Parameter file screen to return to the applicant record.

Adding Relationships

Relationships are familial, social, or business associations with other persons or with organizations. By adding relationships, you improve the depth and consistency of your records and improve processes like mailings and assigning actions.

On applicant records, you can create personal relationships with individuals, faculty/staff, or other applicants. If you have **Registrar’s Office** or **Student Billing**, you can also create personal relationships with students. For example, an applicant can have a parent who teaches at the school or siblings who are applicants.

You can also add business relationships on applicant records. For example, an applicant may be a member of an organization. By creating a business relationship with the organization, you can associate the applicant with actions and recommendations for the organization and add the applicant to organization mailings.

You add relationships to an applicant record on the Relationships tab. Entries on the Relationships tab affect other areas of the program. For example, if you add a relationship with a faculty/staff member, the applicant also appears as a relationship on the faculty/staff member’s record.
Relationship information on an applicant record in *Admissions Office* is shared with the student record in *Registrar's Office* and *Student Billing*. If you make changes to relationships in one program, the changes appear in all programs.

- **Adding a personal relationship**
  1. From an open applicant record, select the Relationships tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
  2. In the **Show** field, select “Personal relationships”.
  3. Click **Add Relationship** on the action bar. The Open screen appears. Locate the record and click **Open**. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*. You return to the Relationships tab, and the selected relationship appears in the grid.
  4. In the **Relationship** column, select how this person is related to the applicant.
  5. In the **Reciprocal Relationship** column, select how the applicant is related to this person.
  6. If the relation is an emergency contact for the applicant, mark the checkbox in the **Emergency Contact** column.
  7. If the relation lives with the applicant, mark the checkbox in the **Lives with Applicant** column.
  8. In the **Notes** field, enter any additional information about the relationship.
  9. To save the record and return to the Applicants page, click **Save and Close**.

- **Adding a business relationship**
  1. From an open applicant record, select the Relationships tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
2. In the **Show** field, select “Business relationships”.

3. Click **Add Relationship** on the action bar. The Open screen appears. Locate the record and click **Open**. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*. You return to the Relationships tab, and the selected relationship appears in the grid.

4. In the **Relationship** column, select how this organization is related to the applicant.

5. In the **Reciprocal Relationship** column, select how the applicant is related to this organization.

6. In the **Notes** field, enter any additional information about the relationship.

7. To save the record and return to the Applicants page, click **Save and Close**.
Viewing the relationship tree

1. To view a visual representation of an applicant’s relationships, select Applicant, Relationship Tree.

2. To open a relation’s record, select the name and click Open.
3. To search for a relation in the tree, click Find.
4. To print the relationship tree, click Print.
5. To expand all of the relations in the tree at once, click Expand All.
6. To close the relationship tree and return to the applicant record, click Close.

Adding Tracks and Checklist Items

Warning: Before using the Checklists tab on an applicant record, we recommend that you determine how tracks and checklists best suit your school’s admissions process.

To streamline the admissions process, you can add tracks and individual checklist items to an applicant record. However, tracks and checklist items must be created in Configuration before you can add them to an applicant record. You can add tracks to an applicant record automatically, based on the status of the applicant. For example, you can configure the program to add a New Student track automatically when the status of the applicant changes to Enrolled. You can configure the program to add a track when another track is completed. For more information on defining tracks and checklist items, see the Configuration Guide for Admissions Office.

Glossary: A track is a group of items and actions that can be automatically added to applicant records to automate the admissions process. A checklist item is an item to be completed before an applicant is accepted for admission, such as application fees, test scores, and medical forms. You can group related checklist items in a track.

You can group related checklist items in a track. A track is composed of individual checklist items that can include tasks to be completed by the applicant, admissions office, and faculty. For example, an application track could include checklist items for receiving an applicant’s essay, transcripts, and recommendations.

You can add individual checklist items to an applicant record. This is helpful when you need to assign a single task to an applicant, instead of an entire track. However, manually added checklist items cannot be associated with actions.
Adding Tracks

In *Admissions Office*, you can add a track and the associated checklist items to an applicant record, which can help streamline your admissions process. Before adding a track to an applicant record, it must be created in *Configuration*. The same track can only be assigned to an applicant once per academic year.

You can add tracks to applicant records automatically, based on the status of the applicant. For example, you can configure the program to add a New Student track automatically when the status of the applicant changes to Enrolled. You can configure the program to add a track when another track is completed. For more information about creating tracks and checklist items, see the *Configuration Guide for Admissions Office*.

- **Adding a track**
  
  1. From an open applicant record, select the Checklist tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

  **Glossary:** An academic year is a time frame that spans the entire school year and contains information used by the admissions and registrar’s offices. An academic year cannot exceed 12 months, nor can it overlap another academic year. In *Admissions Office*, you can create academic years for each school for which applicants apply for admission.

  2. In the **School** and **Academic year** fields, select the school and academic year for which the applicant is applying. The **School** field appears only if multiple schools are defined in *Configuration*. For more information about defining multiple schools, see the *Configuration Guide for Admissions Office*.

  3. To add a track, click **Add a New Track**. The Add a New Track screen appears.
4. In the School field, select the school in which to add the track. This field appears only if you have defined multiple schools in Configuration, and the applicant is applying to more than one.

5. In the Academic year field, select the academic year for which to add the track.

6. In the Track field, select a track. Depending on how your school’s tracks and checklists are defined, marking a checklist item added from a track “Complete” may add another checklist item or track.

**Note:** You can edit checklist items on an applicant record by changing the information in the grid.

7. Click OK to return to the applicant record. Checklist items included in the track appear in the grid.

8. To save the record and return to the Applicants page, click Save and Close.

Viewing track details

By viewing track details, you can see the tracks on an applicant record and information about the tracks, including date added, date completed, and description. You can remove tracks from an applicant.

**Note:** To remove a track from an applicant record, select the track in the grid and click Remove a Track. When you remove a track, you remove the checklist items.
1. From an open applicant record, select the Checklist tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. Click View Track Details. The Track Details screen appears.

3. To return to the applicant’s record, click Close.

Adding Checklist Items

Glossary: A checklist item is an item to be completed before an applicant is accepted for admission, such as application fees, test scores, and medical forms. You can group related checklist items in a track.

In Admissions Office, you can manually add a checklist item to an applicant record without adding an entire track. Although, manually added checklist items are not associated with tracks or actions, they are specific to a school and academic year. You can delete checklist items at any time if they are not associated with a track.
Adding a checklist item

1. From an open applicant record, select the Checklists tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. In the Item column, select a checklist item.

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

4. In the Status column, select the status of the checklist item.
   Once the checklist item is complete, enter the completion date in the Completion Date column.

5. If an amount is due for the checklist item, in the Amount Due column, enter the amount due for the item.
   Once you receive an amount due for a checklist item, enter that amount in Amount Received column.

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

Note: You create checklist letters in Configuration. For more information, see the Configuration Guide for Admissions Office.

7. You can print a letter with information about the checklist item.
   • To print a predefined checklist letter, in the Letter column, select a letter format and click the Letter button. A processing screen appears as the letter merges and then Word opens displaying the merged letter.
• To print a quick letter, click the **Letter** button. **Word** opens to a document with student information merged into the heading. The rest of the document is blank so you can create a custom letter “on the fly”.

**Note:** If you save a letter to a checklist, a **Word** icon appears in the status bar of the Checklist tab.

8. On the **Word** document toolbar, you can click **Save this document to the checklist item** to save the letter to the database with the checklist item record. You can later access the letter from the Checklist tab.

9. To close the letter and return to the checklist record, click **Return to <Applicant>**.

10. Once you send the letter, you can mark the checkbox in the **Letter Sent** column and enter the date in the **Letter Sent Date** column.

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

### Add Education Information

**Note:** If you have **Registrar’s Office** or **Student Billing**, and the applicant has a student record, you can select **Applicant, Switch view, Student (Registrar’s Office)** or **Student (Student Billing)** from the menu bar to view the student record in those programs. To return to the applicant record, from the menu bar, select **Student, Switch view, Applicant (Admissions Office)**.

On the Education tab, you use education records to store information about an applicant’s educational background, including schools previously attended. You can create multiple records spanning an applicant’s entire school career, all of which are conveniently accessed on the Education tab. You can include grades and enrollment dates, school status, performance history, and whether transcripts for the applicant are required.

From an education record, you can create recommendation records that efficiently maintain recommendations and referrals for applicants. You can record who made the recommendation, including the length of time known and relation to the applicant. You can record the category, criteria, and rating of the recommendation. The person giving the referral must exist as an individual or faculty/staff member record in your database.

To add an education record to an applicant, complete the following:

• “Add education information” on page 36
• “Add performance history on the education record” on page 38
• “Add a recommendation on the education record” on page 39
• “Adding Attributes” on page 46
• “Adding Notes” on page 48

* Add education information

**Note:** To edit existing education information, select the education in the grid and click **Open** on the action bar.
1. From an open applicant record, select the Education tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. To add an education record, click **New Education**. The New Education screen appears.

3. In the **Education type** field, select the type of education record you want to create for the student. For example, select “Future school” if you want to create a record for the school the student is applying to for future enrollment.

   If you select “Past school”, the **Feeder school**, **Transcript required**, and **Transcript received** fields appear.

   If you select “Other”, only the **Transcript required** and **Transcript received** fields appear.

4. In the **School name** field, click the binoculars to search for or add a school.

5. In the **Contact** field, select the contact for the school. The **Type** and **Organization** fields are for informational purposes only.

   Information in the **Address** and **Phones** boxes automatically appears based on the contact’s information.

   If no contact is selected in the **Contact** field, the organization’s information appears.
6. In the Date enrolled from [ ] to [ ] field, enter the dates the applicant attended this school.
7. In the Grade from [ ] to [ ] field, select the grade levels in which the applicant was enrolled.
8. If a transcript is required from this school, mark Transcript required.
9. When the transcript is received from this school, mark Transcript received.
10. In the Reason left field, select the reason the applicant left the school.
11. In the School status field, select the applicant’s current status. You can select “Graduated”, “Accepted”, or “Current Student”.
12. In the Graduation date and Class of fields, enter the applicable graduation information. The appearance of the Class of field is determined by a business rule in Configuration. For more information about business rules, see the Configuration Guide for Admissions Office.

- Add performance history on the education record

To track the academic performance at an applicant’s previous school, use the Performance History tab on the education record. You can use performance history information in your recruiting and marketing process as well as your financial aid decision-making if the applicant enrolls.

1. From an open education record, select the Performance History tab.

   ![Performance History Tab](image)

2. In the GPA field, enter the applicant’s grade point average for the previous school.

   Note: For more information about how to set up the organization record, see “Adding Organization Records” on page 191.

   A GPA scale appears to the right of the GPA based on the information you selected on the previous school's organization record.

   3. In the Class rank and out of fields, enter the applicant’s rank and class size. If you enter a rank, you must also enter the class size.

   The applicant’s percentile in the previous school is automatically calculated and appears in the Percentile field.

   4. In the Credits awarded and out of fields, enter the number of credits the applicant earned and attempted at the previous school.

   5. In the Diploma field, enter or select the diploma the applicant earned.

   6. To save the performance history and return to the Education tab of the applicant record, click OK.

   To continue with the education record, select the Recommendations tab.
Add a recommendation on the education record

To create a recommendation or referral for an applicant, use the Recommendations tab. The person giving the referral must exist as an individual or faculty/staff member record in your database.

Note: Education records can hold an unlimited number of recommendations.

1. To add a recommendation from this school, select the Recommendations tab.

2. To add a recommendation, click **New Recommendation**. The New Recommendation screen appears.

3. In the **Recommendation type** field, select the type of recommendation.

4. In the **Recommended by** field, select the individual who made the recommendation. Information in the **Position** field is for informational purposes only.

5. In the **Has known applicant as [ ] for [ ] years [ ] months** fields, select how the person making the recommendation knows the applicant and the length of time known.
6. In the Evaluations grid, enter the information you have asked the individual submitting the recommendation to complete. In the Category column, select the category for this recommendation, such as “English”, “Mathematics”, or “Science”.

7. In the Criteria column, select the criteria for the category. For example, if you selected “English” as the category, you can select “Verbal” or “Written” as criteria.

8. In the Rating column, select how the recommendation rates the applicant. Examples of ratings include “Excellent”, “Good”, “Fair”, or “Poor”.

9. In the Comments field, enter any additional comments about this evaluation.

10. In the Notes box, enter notes about this recommendation.

11. To add media to the recommendation, select the Media tab. For more information about adding media, see “Adding Media” on page 49.

12. To save the recommendation and return to the Recommendations tab, click **OK**.

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Adding Test Information

**Note:** If you have Registrar’s Office or Student Billing, and the applicant has a student record, you can select Applicant, Switch view, Student (Registrar’s Office) or Student (Student Billing) from the menu bar to view the student record in those programs. To return to the applicant record, from the menu bar, select Student, Switch view, Applicant (Admissions Office).

On the Tests tab, you can record an applicant’s test scores, including the Independent School Entrance Exam (ISEE), Scholastic Aptitude Test (SAT), Secondary School Admissions Test (SSAT), and Comprehensive Test of Basic Skills (CTBS). If you have Registrar’s Office, these scores are shared with the student record.

- **Adding test information**

  1. From an open applicant record, select the Tests tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
2. On the action bar, select a test type and click Add <test type> Test. A row is added for each subtest associated with the test type. For example, select “SAT”. The test names appear in the Test and Subtest columns.

3. In the Date column, enter the date the applicant took the test.

4. In the Score column, enter the applicant’s score.

5. In the Stanine column, enter the stanine ranking.

6. In the Percentile 1 and Percentile 2 columns, enter the percentiles of the applicant’s test score.

7. To print the test score on transcripts, mark the checkbox in the Print? column.

8. In the Comments column, enter any additional comments about the test.

9. To save the record, click Save. The Show best score/test equivalent information for: [ ] field, defaults to the test type selected in step 2.

   At the bottom of the screen, the grid on the left lists scores for each subtest of the selected test type. The grid on right displays the corresponding score of the test equivalent defined for the selected test type. For more information about test equivalents, see Test Equivalents in the Configuration Guide for Admissions Office.

10. To close this record and return to the Applicants page, click Save and Close.

### Adding Actions

The Actions tab records any task to be completed for an applicant. Actions, for example, can include a phone call to a parent or responsibility for sending an acceptance letter to the applicant. If you have the security rights, you can add, edit, and delete actions from this tab.

**Note:** You can associate actions with tracks and checklist items to automate your admissions process. Once associated, actions can be added automatically when a track or checklist item is assigned. For more information, see “Adding Tracks and Checklist Items” on page 31.
You can assign an action to another person or yourself, and the program reminds you when the action is due. For example, if the admissions officer needs to call an applicant to schedule an interview, you can assign the phone call as an action. When the phone call is due, the program reminds him by adding an action reminder to that user’s Home page. You can also create a letter about the action directly from the action record.

When you create a letter using the **Letter** menu or **Letter** button on an applicant record, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 76.

- **Adding an action**
  1. From an open applicant record, select the Actions tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

![New Action Screen](image)

3. If you have multiple schools defined in **Configuration**, in the **School** field, select the school for which to associate this action.

4. In the **Contact for** field, select the year for which the contact is occurring.

   The **Contact for** field is very useful when reporting using action types. For example, when you use action types to break down your report by which marketing techniques yielded the most inquiries versus applications and accepted students, the **Contact for** field specifies the admissions year associated with the contact. Use this field to ensure accurate data in your report. When you leave this field blank, it does not appear in reports.

5. Mark the **First contact?** checkbox to designate this action as the first contact to your school. Only one action can be marked as the first contact for an applicant record for each admissions year.

   For tracking and reporting purposes, you can use the **First contact** field on the action record to track when and how the applicant inquired. You can use the **Source** field on the Bio 2 tab of the action record to track the source of the application, such as open house or newsletter.

6. In the **Action type** field, select the type of action to be taken, for example, “Phone call” or “Meeting”.

7. In the **Start date**, **End date**, and **Time** fields, enter the dates and times the action is to be taken and finished.

   **Note:** When the action is complete, open the record and mark **Action completed on**. The program automatically enters the current date.

8. In the **Priority** field, select “Low”, “Normal”, or “High”.

9. In the **Location** field, click the binoculars to select a location.

10. In the **Action status** field, select the status of the action, for example, “Pending”.

    **Note:** You create action letters in **Configuration**. For more information, see the **Configuration Guide for Admissions Office**.

11. You can print a letter for the applicant with information about the action.
• To print a predefined action letter, in the **Action letter** field, select a letter format and click the **Letter** button. A processing screen appears as the letter merges and then **Word** opens displaying the merged letter.

• To print a quick letter, click the **Letter** button. **Word** opens to a document with applicant information merged into the heading. The rest of the document is blank so you can create a custom letter “on the fly”. For more information about quick letters, see “Creating a Quick Letter for an Applicant” on page 76.

**Note:** If you save a letter to an action, a **Word** icon appears in the status bar of the action record.

12. On the **Word** document toolbar, you can click **Save this document to the action** to save the letter to the database with the action record. You can later access the letter from the action record.

13. To close the letter and return to the action record, click **Return to Action for <Applicant>**.

14. Once the letter is sent, open the record and mark **Action letter sent on**. The program automatically enters the current date.

15. In the **Description** box, enter a description of the action.

16. To send a reminder to another user, mark **Send reminder to** and select a user’s name. In the fields directly below **Set reminder to**, to determine when to send the reminder, in the fields, enter a number and select “Days”, “Weeks”, or “Months”.

17. In the **Assigned to** field, select the person assigned to complete the action. The program automatically completes the **Assigned to type** field from the information on the record you select. The action appears on the record of the person selected in the **Assigned to** field.

**Note:** Your selections in the **Current status** and **Status date** fields update the same information on the student’s Bio 1 and Enrollments tabs.

18. If the action is for an applicant, to change the applicant’s status based upon completion of this action, mark **Update status information** and select the status to be applied once the action is complete. If you mark this checkbox, when the action is complete, the program makes the status change in the **Current status** field on the Bio 1 and Applications tab of the applicant record.

19. To update the **Status date** field upon completion of the action, select “Use completed date”, “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”.
   • To make no change to the status date, leave the field blank.

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

20. In the **Status reason** field, enter the status reason to appear on the applicant record.

21. To add attributes or notes to the action, click the Attributes/Notes tab. For more information about attributes and notes, see “Adding an attribute” on page 47 and “Adding a note” on page 48.

22. To save the action and return to the Actions tab, click **Save and Close**. The new action appears in the grid.

### Adding Activities

**Note:** If you have **Registrar’s Office** or **Student Billing**, and the applicant has a student record, you can select **Applicant, Switch view, Student (Registrar’s Office)** or **Student (Student Billing)** from the menu bar to view the student record in those programs. To return to the applicant record, from the menu bar, select **Student, Switch view, Applicant (Admissions Office)**.
On the Activities tab, you can add an applicant’s extracurricular activities. You can record activities the applicant participated in at previous schools and activities the applicant plans to participate in at your school.

To add activities to a student record, activity categories must first be defined in Configuration. With activity categories, you can group activities. For example, if you select Athletics in the Category field, you can select Soccer or Football in the Activity field. In Configuration, you can also define Activity Rating and Activity Role/Position table entries to make available for activity records.

- **Adding an activity**
  1. From an open applicant record, select the Activities tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
  2. To add an activity, click **New Activity**. The New Activity screen appears.
  3. In the **Category** and **Activity** fields, select the category and type of activity in which the applicant participated. For example, if you selected “Athletics” in the Category field, you can select “Soccer”, “Swimming”, or “Football” in the Activity field.
  4. In the **Date from** and **Date to** fields, enter the dates the applicant participated in the activity.
  5. In the **Hours/Week** and **Week/Year** field, enter the number of hours per week and number of weeks per year the applicant participated in the activity.
  6. In the **Comments** field, enter any additional comments about the activity.
  7. In the **Rating** field, select a rating for how valuable the applicant is to that particular activity.
  8. In the **Role/Position** field, select a special title, role, position, or achievement to specify for the activity.

**Note:** To edit existing activity information, select an activity in the grid and click **Open** on the action bar.
9. To indicate a student’s preferred activity, mark **Preferred activity**.

10. In the **Participation** grid, you can record participation in each activity. In the **Grade Level** column, select the grade level in which the applicant participated or wants to participate in the activity.

11. In the **Academic Year** column, enter the year the applicant participated or wants to participate in the activity.

12. In the **Eligibility Status** column, select the status of applicant.

13. To indicate whether the applicant participated or wants to participate in the activity, mark **Wants to Participate** or **Participated**.

14. To save the record and return to the applicant’s Activities tab, click **Save and Close**.

### Managing Attributes, Notes, and Media

**Note:** If you have **Registrar’s Office** or **Student Billing**, and the applicant has a student record, you can select **Applicant, Switch view, Student (Registrar’s Office)** or **Student (Student Billing)** from the menu bar to view the student record in those programs. To return to the applicant record, from the menu bar, select **Student, Switch view, Applicant (Admissions Office)**.

You can further define an applicant record by adding information to the Attributes, Notes, and Media tabs. On the Attributes tab, you can add characteristics to the applicant record and group information based on a common theme, which is useful for reporting. On the Notes tab, you can record special information about applicants you may need later. On the Media tab, you can store various media objects, including images, documents, and video or sound files. For example, you can store a scanned birth certificate for an applicant.

### Adding Attributes

The Attributes tab stores additional information about an applicant. You can use attributes to define specialized information for records, such as information you want to record, but for which no field is available. You can filter attributes to use in other areas of **Admissions Office**, such as **Query** and **Reports**.

You can define attributes using a variety of data types created in **Configuration**. If you make an applicant attribute required, a message appears reminding you to add it when creating an applicant record. For more information about defining attributes, see the **Configuration Guide for Admissions Office**.
Adding an attribute

1. From an open applicant record, select the Attributes tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. In the **Attribute Type** column, select an attribute type.

3. In the **Description** column, select or enter a description of the attribute.

4. In the **Date** column, enter a date to record when you add the attribute.

5. If this attribute type is required on an applicant record, the program automatically marks the checkbox in the **Required** column. You cannot edit this on the Attributes tab.

6. In the **Comments** column, enter any additional comments or more detailed information about the attribute. You can enter free-form text in this column.

7. To save the attribute, click the **Save** button on the toolbar.

**Warning:** You must define attribute types in *Configuration* before you can add them to an applicant record. For more information about attributes, see the *Configuration Guide for Admissions Office*. 
Adding Notes

The Notes tab makes it easy to record and maintain information about an applicant. For example, you can add a note to record special information about a person or organization, notes from a conversation or phone call, or contact information you may need later.

For each note, you enter a date, description, title, and author. You enter the body of the note in a text box that holds an unlimited amount of free-form text. You can designate note types, such as “Confidential” or “Personal”, and use those designations to run queries, reports, and establish type-based security.

You can set up securities so only certain users can view particular notepad types. This is especially useful when the information is of a sensitive nature and you want to ensure that only you can access the information. For more information about security, see the Security chapter of the Administration Guide for The Education Edge.

Adding a note

1. From an open applicant record, select the Notes tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

   Note: To edit an existing note, select the note in the grid and click Open on the action bar.
2. On the action bar, click **New Note**. The New Note screen appears.

3. In the **Type** field, select a note type.
4. In the **Description** and **Title** fields, enter a description and title for the note.
5. In the **Author** field, select your user name.

**Note:** You can use the formatting selections on the toolbar to format the note.

6. In the text box, enter notes to associate with the applicant record.
7. To save the note and return to the Notes tab, click **Save and Close**. The new note appears in the grid.

### Adding Media

On the Media tab, you can add media objects to an applicant record. Media can include photographs, scanned newspaper articles and publications, recommendations, video files, audio files, and transcripts.

To reduce the size of your database, you can create a link to the media file. Be aware that if the original file is moved or deleted, the link will not work. The linked file must be in a location on your network where other users can access it.

#### Adding a new media object

**Glossary:** Media is information about a record such as a photograph or scanned newspaper article. You can create new media objects or retrieve existing media objects to save in the record.
1. From an open applicant record, select the Media tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. On the action bar, click **New Media**. The Insert Object screen appears.

3. To create a media file, mark **Create New**.

4. In the **Object Type** box, select a media object. The object types that appear depend on the programs you have installed.

5. To display the media object as an icon, mark **Display As Icon**.

6. Click **OK**. Depending on the kind of media you are creating, either the New Media screen appears, or the program create the specified file type opens.
   - If the program for creating the media file type opens, create the media file. After you save and close the file, the New Media screen appears.
- For other file types, you create and add the media in the window at the bottom of the New Media screen.

7. On the New Media screen, in the Date field, enter the date you add the media object.
8. In the Type field, select a media type.
9. In the Description and Title fields, enter a description and name for the media object.
10. In the Author field, select your user name.
11. To save the media object and return to the Media tab, click Save and Close. The media information appears in the grid.

Adding an existing media object

Note: When you create media from a file, you browse to saved media objects. If a media object is no longer valid or current, you can access the object and delete it on the Media tab of the applicant record.
1. From an open applicant record, select the Media tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

2. Click **New Media**. The Insert Object screen appears.

   **Note:** Mark **Link** so that any changes you make automatically appear on the Media tab.

3. To add a media object using a previously-created file, mark **Create from File**.

4. Click **Browse** to search for the file. Once you locate and select the file, click **Open**. You return to the Insert Object screen, which now displays the file path.

5. To change the source file to be automatically reflected on the Media tab, mark **Link**. If you do not mark **Link**, the object is embedded.

6. Click **OK**. The New Media screen appears displaying the selected media object.

7. In the **Date** field, enter the date you add the media object.

8. In the **Type** field, select a media type.

9. In the **Description** and **Title** fields, enter a description and name for the media object.
10. In the Author field, select your user name.

11. To save the media object and return to the Media tab, click Save and Close. The media information appears in the grid.

Adding Financial Aid Information

**Note:** If an applicant’s financial situation changes, you can make the necessary corrections, or delete the financial aid record and create a new one. Once a financial aid record is deleted, it cannot be recovered.

On the Financial Aid tab, you can maintain information about types of tuition assistance requested by the applicant, family income and expected contribution, and the type of aid the applicant receives. For each academic year, only one financial aid record can exist.

Financial aid information on an applicant record in *Admissions Office* is shared with the student record in *Registrar’s Office* and *Student Billing*. If you make changes to financial aid applications in one program, the changes appear in all programs.

- Adding financial aid information

**Note:** To edit existing financial aid information, select the financial aid in the grid and click Open on the action bar.

1. From an open applicant record, select the Financial Aid tab. For information about opening records, see “Finding and Opening Applicant Records” on page 3.
2. To add a financial aid record, click **New Financial Aid**. The Financial Aid screen appears.

3. In the **Academic year** field, select the year for which the applicant is requesting financial aid. An applicant can have only one financial aid record per academic year. Only academic years for which the applicant does not have a financial aid record appear in the submenu.

4. If the applicant wants financial assistance, mark **Financial aid desired**.

Note: After sending the financial aid form, mark **Form sent on [ ]** and enter the date. Once the applicant returns the financial aid form, access the record and mark **Form received on [ ]** and enter a date.

5. In the **Family income** field, enter the family’s income.

6. In the **Adjusted family income** field, enter the amount the school is adjusting the family’s income.

7. In the **Cost of attendance** field, enter the cost to attend the school. This field is used to calculate the total annual qualification.

8. In the **Reported family contribution** field, enter the total amount a family can spend on education for the year. This amount is determined by School and Student Services for Financial Aid (SSS).

9. In the **Expected family contribution** field, enter the amount the family is expected to contribute for this applicant’s tuition. This amount is calculated by SSS.

The **Total annual qualification** field displays the total amount for which the applicant qualifies. This field automatically displays the calculation based on the amounts in the **Cost of attendance** and **Expected family contribution** fields. Total annual qualification equals cost of attendance minus expected family contribution.

Note: Once the letter is sent, access the record, mark **Letter sent on [ ]** and enter a date.

10. In the **Letter** field, select the letter to send to the applicant.

11. In the grid, access the **Category** column and select a financial aid category, for example, “Scholarship” or “Grant”.

12. In the **Type** column, select the type of aid given to, or requested by, the applicant, for example, “Presidential science grant” or “Soccer scholarship”.

13. In the **Date** column, enter the date the financial aid information was entered.

14. In the **Amount Qualify** column, enter the amount of financial aid for which the applicant qualifies.
15. If financial aid is granted, access the record and enter the date granted in the Date Granted column.

16. If financial aid is granted, access the record and enter the amount granted in the Amount Granted column.

17. If the applicant accepts the financial aid offer, access the record and mark the checkbox in the Accepted column.

**Note:** Attributes assigned on the Financial Aid tab can be helpful in keeping a record of the various forms required.

18. To add attributes and notes to the financial aid information, select the Attributes/Notes tab. For more information about adding attributes and notes, see the Program Basics Guide.

19. To save the record and return to the applicant's Financial Aid tab, click **OK**.

### Adding Medical Information

On the Medical tab, you can enter and maintain health and insurance information about applicants, including immunizations, medical history, allergies and conditions, and emergency contacts.

- **Adding medical information**

  1. From an open applicant record, select the Medical tab. Selections on the right side of the screen change as you make selections in the list on the left. For information about opening records, see “Finding and Opening Applicant Records” on page 3.

  2. From the list, select **General**.

  ![Medical Tab](image)

  3. If the school has received the applicant’s medical form, mark **Medical form received**.

  4. If the school has the applicant’s insurance card on file, mark **Insurance card on file**.

  5. If the applicant wants to use the school’s insurance instead of their family insurance, mark **Wants school insurance**.
6. In the Insurance last updated on field, enter the last date the applicant’s insurance information was updated.

7. If the school has permission to treat the applicant, mark Permission to treat. In the Authorization date field, enter the date permission was given.

8. In the Physician name field, enter the name of the applicant’s physician.

9. In the Country, Address, City, State, and ZIP fields, enter the doctor’s address.

10. To add contact information, in the Contact grid, in the Contact Type column, select a contact method. In the Contact Number column, enter a phone number or Web or email address.

11. In the Preferred Hospital field, select the applicant’s preferred hospital.

12. From the list on the left, select Visits/Medications. Once an applicant becomes a student, you can record details about visits to the school nurse in the Visits grid.

13. To add information about drugs and medications the applicant takes, in the Medications grid, in the Medication column, enter a medication.

14. In the Dosage column, enter the amount of medication to be given.

15. In the Times a Day? column, enter the number of times per day the medication should be taken.

16. In the Effective Date and End Date columns, enter the date the treatment begins and ends.

17. In the Comments column, enter any additional information about the medication. For example, you can note whether the medication needs to be taken with food or if it causes drowsiness.

Note: For applicants with severe allergies, we recommend setting up an annotation that opens when the applicant record is accessed. For more information about adding annotations to a record, see the Program Basics Guide.
18. Select **Conditions/History** from the list.

19. In the **Allergy/Condition** column, enter the applicant’s allergies or medical conditions.

20. In the **Effective Date** and **End Date** columns respectively, enter the date the applicant’s condition was diagnosed, as well as the date they recovered.

21. In the **Comments** column, enter any additional comments about the condition.

22. To record the applicant’s medical history, in the **Medical History** grid, in the **Date** column, enter the date of the treatment or hospital visit.

23. In the **Category** and **Description** columns, select the category of the medical history or condition and enter a brief description of the medical history.

24. In the **Comments** column, you can enter additional information about the condition.
25. Select **Immunizations** from the list.

26. In the **Immunization** column, select the immunizations the applicant has received.

27. In the **Status** column, select:
   - “Required” if the applicant needs to receive the immunization.
   - “Exempt” if the applicant is exempted and does not need to receive the immunization.
   - “Optional” if the immunization is not required.

28. In the **Date** column, enter the date the applicant received the immunization.

29. In the **Comments** column, enter any additional comments about the immunization.

   **Tip:** To open an emergency contact’s record on the Medical tab, right-click the name in the grid and select **Go to Emergency Contact**.

30. To view emergency contacts for the applicant, select **Emergency Contacts** in the list. Relationships marked as emergency contacts on the Relationships tab appear in the **Emergency Contacts** grid. This grid is for informational purposes only. You cannot add or edit data in the grid.
When you select an emergency contact in the grid, address information for that relation appears in the section at the bottom of the screen.

31. Select Notes in the list. A text box appears.

32. To enter any additional medical notes, enter information in the text box.
33. Select **Insurance** in the list. The **Primary Insurance** and **Secondary Insurance** frames appear on the right.

![Insurance frame](image)

34. To enter the insurance carrier, click **Health care provider**, the Health Provider for [ ] screen appears.

![Health Provider for Michael Richard Andrews](image)

35. From the drop-down field, select “Enter provider here” to enter the name of the insurance carrier or select “Link to an existing organization” and click the binoculars to select the insurance carrier.

36. In the **Country, Address, City, State, and ZIP** fields, enter the insurance carrier’s address.

37. In the contact grid, in the **Contact Type** column, select a contact method. In the **Contact Number** column, enter a phone number or Web or email address.

38. To save the insurance information, click **OK** and return to the Medical Tab.

39. If the applicant has secondary insurance, click **Health care provider** and complete the fields on the Health Provider for [ ] screen and return to the Medical tab.

40. In the **Policy number** field, enter the insurance policy number.

41. In the **Policy contact name** and **Contact number** fields, enter the name and phone number of the contact person at the insurance company.
42. To view a summary of the applicant’s medical information, select **Summary** in the list. This grid is for informational purposes only. You cannot add or edit data in the grid.

43. To save the record and return to the Applicants page, click **Save and Close**.

### Viewing History of Changes

The History of Changes tab displays an historic record of key changes made to the applicant record. For example, if you change the applicant’s address information, the change appears on the History of Changes tab.

The information is for informational purposes only. You cannot add or edit data on the History of Changes tab.

- **Viewing an applicant’s history of changes**
  1. From an open applicant record, select the History of Changes tab. The grid displays **Item Changed**, **Previous Setting**, **New Setting**, **Changed On**, and **Changed By** columns. The History of Changes tab is for informational purposes only.

2. Click **Save and Close** to return to the Applicants page.
Creating a Letter from an Applicant Record

If you have Word 2000 or Word XP installed on your computer, you can use the Letter menu to quickly and easily print a single letter for an applicant directly from the applicant record, rather than creating it in Mail.

**Note:** The Letter menu displays letter formats created in Configuration and Records. For more information about creating letters in Configuration, see the Configuration Guide for Admissions Office.

On the Letter menu, you can select a predefined letter format or select Create a New Letter Format to create a new one. Letter formats are associated with an applicant export and a simple or conditional Word merge file. For more information, see “Creating a Merged Letter for an Applicant” on page 62.

You can also create a quick letter for an applicant by selecting Write a Letter from the Letter menu. This generates a Word document with basic applicant information merged automatically into your letter. The rest of the document is blank so you can write a custom letter “on the fly”. For more information, see “Creating a Quick Letter for an Applicant” on page 76.

You can select Modify Letter Menu to organize and edit saved letter formats. For more information, see “Organizing and Editing Letter Formats” on page 77.

When a letter is complete, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 76.

Creating a Merged Letter for an Applicant

Merged letters combine data from an export file with a simple or conditional Word merge file. A simple merge uses a single form letter. For example, you can create a form letter for applicants acknowledging receipt of an application. The body of the letter is the same for all applicants, but the address section is customized with the recipient’s name, address, and primary salutation.

A conditional merge produces a letter using one of several form letters, based on conditions you define. For example, you can create form letters to notify applicants they were accepted, denied, or waitlisted. Using the conditional merge process, you define conditional statements that match applicants with the letter they should receive based on their current applicant status. For more information about setting up exports and Word merges, see the Export Guide.

Creating a new simple merge letter from an applicant record

**Note:** You can also create a new letter format by clicking the down arrow next to the Letter button on the toolbar, and selecting Create a New Letter Format.

1. From the menu bar of an open applicant record, select Letter, Create a New Letter Format. The New Applicant Letter screen appears.

2. In the Letter description field, enter a description for the letter. This description appears in the Letter menu and Applicant Letters in Configuration.
Note: In the Export format field on the Open screen, select “Blackbaud Simple Word Merge”.

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

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

The What type of export do you want to create? box displays “Applicant” by default.

Tip: You can set a default export format in Options.

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

6. Click **Create Now**. The New Applicant Export screen appears.

![New Applicant Export screen](image)

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

![Available Fields treeview](image)

You must have the appropriate security rights to output credit card, bank account, and Social Security numbers. If you have rights, when you add these merge fields, a screen appears where you can select whether the numbers should be masked or unmasked in the letter. If you do not have rights, these numbers are always masked in the letter. For more information, see the Security chapter of the Administration Guide for *The Education Edge*.
8. When finished selecting fields, click **Edit word merge file**. **Word** opens automatically to a blank document to use to create your letter.

9. Type the letter in **Word**. To insert a field from *The Education Edge*, select **Insert Education Edge field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

10. When you have finished creating the letter, click **Save and return to EE7 to Merge**. You return to the New Applicant Export screen.

11. Click **Save and Close**. The Save Export As screen appears.
12. Enter a name and description of the export and click **Save**. You return to the New Applicant Letter screen.

13. To save and close the New Applicant Letter screen, click **OK**.

**Note:** Once a new letter format is added to the **Letter** menu, you can access it from any applicant record to quickly print the same letter for that applicant. Letter formats are also added to Applicant Letters in **Configuration**.

14. To print the letter you just created, you must first add it to the **Letter** menu. Select **Letter, Modify Letter Menu**. The Modify Letter Menu screen appears.

15. Click **Search** to access the Search Applicant Letters screen.
16. Select the letter to add and click **Open**. The Search Applicant Letters screen closes and the new letter appears in the list.

![Modify Letter Menu](image)

17. Click **Close**. You return to the applicant record.

18. From the menu bar select **Letter** and then select the new letter from the menu.

![Applicant Record](image)
A processing screen appears as the letter generates and then *Word* opens displaying the merged letter.

19. Click **Print**.

20. To close the letter and return to the applicant record, click **Return to <Applicant>**.

**Creating a new conditional merge letter from an applicant record**

1. From the menu bar of an open applicant record, select **Letter, Create a New Letter Format**. The New Applicant Letter screen appears.

2. In the **Letter description** field, enter a description for the letter. This description appears in the **Letter** menu and Applicant Letters in *Configuration*.

**Note:** You can click **Save this document as an action** to save the letter as an action. For more information, see “Saving a Letter as an Action” on page 76.

**Note:** In the **Export format** field on the Open screen, select “Blackbaud Conditional Word Merge”.
3. In the **Blackbaud Word Merge export** field, you can associate this letter with a *Word* merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

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

   The **What type of export do you want to create?** box displays “Applicant” by default.

   **Tip:** You can set a default export format in Options.

5. In the **Export format** field, select “Blackbaud Conditional Word Merge”.
6. **Click Create Now.** The New Applicant Export screen appears.

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

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

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

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

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

14. Type the letter in **Word**. To insert a field from **The Education Edge**, select **Insert Education Edge field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

15. When you have finished creating the letter, click **Save and return to EE7 to Merge**. You return to the Conditional Merge Document screen.
16. Click OK. You return to the Word Merge Wizard and the new condition appears in the grid.

17. To select more conditions, click Back and repeat steps 10-16.
18. When finished selecting conditions, click Finish. You return to the New Applicant Export screen.
19. Click Save and Close. The Save Export As screen appears.

20. Enter a name and description of the export and click Save. You return to the New Applicant Letter screen.
21. To save and close the New Applicant Letter screen, click OK.

Note: Once a new letter format is added to the Letter menu, you can access it from any applicant record to quickly print the same letter for that applicant. Letter formats are also added to Applicant Letters in Configuration.
22. To print the letter you just created, you must first add it to the **Letter** menu. Select **Letter, Modify Letter Menu**. The Modify Letter Menu screen appears.

23. Click **Search** to access the Search Applicant Letters screen.

24. Select the letter to add and click **Open**. The Search Applicant Letters screen closes and the new letter appears in the list.

25. Click **Close**. You return to the applicant record.
26. From the menu bar select Letter and then select the new letter from the menu.

![Image of a menu bar with Letter selected]

Note: You can click Save this document as an action to save the letter as an action. For more information, see “Saving a Letter as an Action” on page 76.

A processing screen appears as the letter generates and then Word opens displaying the merged letter for the condition that matches the applicant.

![Image of a Word document with a letter]

27. Click Print.

28. To close the letter and return to the applicant record, click Return to <Applicant>.
Creating a Quick Letter for an Applicant

You can create a quick letter for an applicant by selecting **Write a letter** from the **Letter** menu. A quick letter does not require a merge or export file. A **Word** document appears with the current date, applicant name, and primary address merged automatically into your letter. The rest of the document is blank so you can write a custom letter “on the fly”.

Creating a quick letter for an applicant

**Tip:** You can also click the **Letter** button on the toolbar to write a quick letter.

1. From the menu bar of an applicant record, select **Letter, Write a Letter**.

   A processing screen appears as the letter generates and then the **Word** document appears with the current date, applicant name, and primary address in the header.

2. Write the letter’s text and then print.

3. To save the letter as an action, click **Save this document as an action**. For more information, see “Saving a Letter as an Action” on page 76.

4. To close the letter and return to the applicant record, click **Return to <Applicant>**.

Saving a Letter as an Action

**Note:** You can also create action letters from the applicant’s Action tab. For more information, see “Adding Actions” on page 41.

When a letter is complete, you can save it as an action. This creates an action record for the applicant with the current date as the **Start date** and **Action completed on** date. The description of the action is “Letter to <Applicant>”. To view the action, select the Actions tab of the applicant record, and open the action.

In business rules, you must set the default action type for each record type. You cannot save a letter as an action until a default action type is selected. For more information about business rules, see the *Configuration Guide for Admissions Office*.

Saving a letter as an action

1. From an open letter in **Word**, click **Save this document as an action** on the toolbar. A message appears, letting you know the action was added.

2. Click **OK**.

3. To close the letter and return to the applicant record, click **Return to <Applicant>**.
Organizing and Editing Letter Formats

On the Modify Letter Menu screen, you can select the letter formats that appear in the Letter menu and organize how they appear. You can also open and edit existing letter formats.

Organizing the Letter menu

1. From the menu bar of an applicant record, select Letter, Modify Letter Menu. The Modify Letter Menu screen appears.

The Show these letters in the letter menu box lists the applicant letters selected to appear in the Letter menu.

**Note:** Once a new letter format is added to the Letter menu, you can access it from any applicant record to quickly print the same letter for that applicant. Letter formats are also added to Applicant Letters in Configuration.

- To add a letter to the menu, click Search to access the Search Applicant Letters screen. Select the letter to add and click Open. The Search Applicant Letters screen closes and the new letter appears in the list.
- To create a new merged letter, click New. The New Applicant Letter screen appears. For more information about creating merged letters, see “Creating a Merged Letter for an Applicant” on page 62.
- To open a letter format, select the letter and click Open. The Applicant Letter screen appears. You can click Edit Export to view or modify the letter’s merge and export files. For more information about editing a saved letter format, see “Editing a saved letter format” on page 78.
- To remove a letter format from the list, select the letter and click Remove. The letter is removed from the list and will no longer appear in the Letter menu.
- To add a horizontal line between letters in the Letter menu, select a letter and click Separator. A line appears below the selected letter.
- To change the order of letters in the Letter menu, select a letter and click Up or Down.

2. Click Close to return to the applicant record.
**Editing a saved letter format**

1. From the menu bar of an applicant record, select *Letter, Modify Letter Menu*. The Modify Letter Menu screen appears.

![Modify Letter Menu](image)

2. Select the letter to edit, and click *Open*. The Applicant Letter screen appears.

![New Applicant Letter](image)
3. Click Edit Export. The export screen appears. On this screen, you can add additional merge fields to use in your letter.

4. To edit the merge document, on the toolbar, click Edit word merge file. Word opens displaying the merge document.

5. You can delete, add, or replace any of the letter’s text.

6. To remove a merge field, select the field in the document and click DELETE on your keyboard.

7. Click Insert Education Edge field to select a replacement merge field.

8. On the toolbar, click Save and return to EE7to Merge. You return to the export screen.


10. Click OK. You return to the Modify Letter Menu screen.

11. Click Close. You return to the applicant record.
Faculty/Staff

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In *Admissions Office*, a faculty/staff member is a teacher, recruiter, advisor, or other employee at your school. You can use faculty/staff records to maintain and store biographical and contact information for these persons. You can create relationships between records, including faculty/staff members, applicants, and individuals.

With faculty/staff records, you can assign actions to staff members, such as conducting interviews or giving open house tours. These actions are recorded on the faculty/staff member’s record and can be assigned a priority.

If you have *Registrar’s Office*, faculty/staff records have additional tabs and functionality, including the capability to create relationships with student records. For more information about faculty/staff records in *Registrar’s Office*, see the Faculty/Staff chapter of the *Records Guide for Registrar’s Office*.

### Accessing Faculty/Staff Records

**Glossary:** A faculty/staff member is a teacher, recruiter, advisor, or other employee at your school. Faculty/Staff records maintain and store biographical and contact information for these persons.

Because records are such an important part of *Admissions Office*, we have placed all record types on the Records page so you can quickly access them. Think of *Records* as a filing cabinet. You open a filing cabinet to pull out a record, or file. When you open *Records*, you can directly access several record types, including faculty/staff records. To access faculty/staff records, click *Records* on the navigation bar, then click *Faculty/Staff*. The Faculty/Staff page appears.

Consider the Faculty/Staff page the starting point for faculty/staff records. From this page, you can add a faculty/staff member or open an existing record. You can edit faculty/staff record options by clicking *Edit options for Faculty/Staff*. For more information about options, see the Options chapter in the *Program Basics Guide*.

To save time when searching for a specific record, you can use the *Search for a Faculty/Staff member by Faculty/Staff member name* field. The Faculty/Staff page lists recently accessed records. You can open a record in the list by clicking the faculty member’s name.
Finding and Opening Faculty/Staff Records

When you click **Open a Faculty/Staff member** on the Faculty/Staff page, the Open screen for faculty/staff records appears. The Open screen has a number of filters you can use to narrow your search and quickly locate the record you want to open. The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results.

You can use wildcard characters if you are not sure how a word is spelled — use a question mark to replace a single character and an asterisk to replace a series of characters. For more information about wildcards, see the **Query Guide**.

- **Opening a faculty/staff record**

  **Note:** You can access the Open screen by selecting **File**, **Open** from **Records**.

  1. On the navigation bar, click **Records**. The Records page appears.
  2. Click **Faculty/Staff**. The Faculty/Staff page appears.
  3. Click **Open a Faculty/Staff member**. The Open screen appears.

  ![Open screen](image)

  **Note:** For more information about filtering criteria on the Open screen, see the Program Basics chapter of the **Program Basics Guide**.

  4. In the **Find Faculty/Staff that meet these criteria** frame, enter criteria you are using to search for the record.
  5. After you enter search criteria, click **Find Now**. The program searches the database and displays all records meeting your criteria.
6. In the grid, select the faculty/staff member to open.

![Faculty/Staff record grid]

7. Click Open. The faculty/staff record appears.

![Faculty/Staff record window]

8. To save the record and return to the Faculty/Staff page, click Save and Close.
Managing Biographical Information

Faculty/staff records are comprised of multiple tabs that store specific information about people who work in your school. When you initially add a faculty/staff record, you enter biographical and job-related information about the person. If a faculty member’s information changes, you note those changes on the record. For example, if a faculty member changes positions or departments, you can record that information.

Adding Faculty/Staff Records

Note: If you have only Admissions Office, some tabs and selections shown here may not appear on the faculty/staff record.

On the Bio 1 tab of a faculty/staff record, you enter personal details about a faculty/staff member including name, gender, and contact information. You can record visa and passport information, as well as various demographic characteristics that your school can include in queries and reports.

Note: To edit an existing faculty/staff record, open the record, make your changes, and save the record. For more information, see “Finding and Opening Faculty/Staff Records” on page 83.

Before adding a new faculty/staff record, consider whether you can get a head start by converting an individual record already in the program. For more information, see “Converting Individual Records” on page 166.

Note: To rearrange the columns, click and drag a column heading to move it or right-click and select Columns from the submenu. On the Define Column Order screen, select the columns to appear in the order you want.
When you enter name information in the name grid on the Bio 1 tab, you are in Edit mode. While in this mode, you can enter a faculty member’s name, title and suffix.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Title 1</th>
<th>Title 2</th>
<th>Suffix 1</th>
<th>Suffix 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Williams</td>
<td>Claire</td>
<td>Louise</td>
<td>Mrs.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Once you enter the name information, click **OK** on the right side of the grid to access View mode.

Mrs. Claire Louise Williams

View mode provides a clear and easy-to-read view of the faculty/staff member’s name. If you need to change the name, click **Edit**, or double-click the faculty/staff member’s name, to access edit mode again.

On the Bio 2 tab, you can record a faculty/staff member’s position, department, and education and certification details.

If you enter common values repeatedly for multiple faculty/staff records, you can create a default set with common values to save time during data entry. The values are defaults only and you can change default information in the fields at any time. You can load default sets on a faculty record by selecting **Faculty/Staff, Load Defaults from** on the menu bar. For more information about default sets, see the Program Basics chapter of the Program Basics Guide.

To prevent entering duplicate faculty/staff records, you can specify duplicate search criteria in **Configuration**. We strongly recommend that you set the business rule to check for duplicates automatically. To search for a duplicate record from an existing record, access the menu bar and select **Faculty/Staff, Duplicate Search**. For more information about business rules, see the Configuration Guide for Admissions Office.
Adding a faculty/staff record

**Tip:** Before adding a new faculty/staff record, consider whether you can get a head start by converting an individual record already in the program. For more information, see “Converting Individual Records” on page 166.

1. To add a faculty/staff record, on the Faculty/Staff page, click **Add a New Faculty/Staff Member.** The New Faculty/Staff member screen appears.

![New Faculty/Staff member screen](image)

**Tip:** You can press **F3** to enter the faculty/staff member’s first name in the *Nickname* field.

2. In the name grid, enter the faculty/staff member’s full name. Last name is required. Once you enter the name, click **OK** to exit Edit mode in the name grid and enter View mode.

3. In the *Nickname* field, enter the faculty/staff member’s nickname.

4. In the *Record ID* field, enter the faculty/staff member’s ID. If you have marked the business rule to automatically generate IDs, the ID completes when the record is saved. For more information about business rules, see the *Configuration Guide for Admissions Office*.

5. In the *Birth date* field, enter the faculty/staff member’s birth date. The *Age* field automatically completes based on the date entered.

**Note:** If the faculty/staff member has deceased, mark *Deceased?*. The *Age* field does not appear when this checkbox is marked.

6. In the *Office* and *Homeroom* fields, select the faculty/staff member’s office and homeroom. The phone number for each room appears to the right of the field. The rooms must be existing room records, or you can create one from the Open screen. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.
7. In the **Affiliation** field, select the faculty/staff member’s affiliation with the school. For example, you can note if the faculty/staff member is an alumnus or a donor. Entries from the submenu are defined on the **Affiliation** table in **Configuration**.

8. To link the faculty/staff record to a spouse, in the **Spouse** field, enter the spouse’s name. When you add a spouse, a relationship is created with “Spouse” as the relationship and reciprocal. The relationship is added on the spouse’s record. The spouse must be an existing record, or you can add one from the Open screen. For more information about the Open screen, see the Program Basics chapter of the **Program Basics Guide**.

9. If the faculty/staff member is a recruiter, mark **Current recruiter**. If you mark this checkbox, you can record recruiters on applicant records.

**Note:** The address entered on the Bio 1 tab becomes the primary address by default. You can change the primary address designation on the Addresses tab.

10. In the **Address** box and in the **Country**, **City**, **State**, and **ZIP** fields, enter the faculty/staff member’s address. To enter additional details about this address, or to copy and link addresses, click the **Address** button. For more information about addresses, see “Adding Addresses” on page 90.

11. In the contact grid, you can enter multiple contacts for the faculty/staff member. For example, you can add home, fax, and cellular phone numbers. In the **Contact Type** column, select the contact type. In the **Contact Number** column, enter the corresponding information, including phone numbers and email addresses.

   The **Link** column indicates whether the information is linked to another record in the database. If you copied and linked the faculty/staff member’s address, you can select “Shared” or “Not Shared”. If the information is not linked to another record, the column defaults to “Not Shared” and is for informational purposes only. For more information about linking addresses and contact information, see “Copying and Linking Addresses” on page 93.

12. To prevent the faculty/staff member from receiving emails from NetMail or Faculty Access for the Web, mark **Requests no email**. This applies to all email addresses on the faculty/staff member’s record.

   If a faculty/staff member receives an email from NetMail or Faculty Access for the Web, a **Click here if you do not want to receive further email** link appears on the email. If the faculty/staff member clicks this link, then clicks a **Remove** button to stop receiving emails from your school, a NetMail user can download and import this information to automatically mark the **Requests no email** checkbox on the faculty/staff member’s record.
13. To continue adding biographical information, select the Bio 2 tab.

14. In the Department column, select faculty/staff member’s department.

15. In the Position column, select the faculty/staff member’s position. Positions are defined on the Position table in Configuration.

   To indicate the faculty/staff member’s primary function, mark the checkbox in the Primary column. Only one position can be marked as primary.

16. In the School column, select the school the faculty/staff member attended. The school must be an existing organization record.

17. In the Dates Attended column, enter the dates the faculty/staff member attended the school.

18. In the Degree column, enter the degree the faculty/staff member obtained.

19. In the Academic Area column, enter the area in which the faculty/staff member received the degree.

20. In the Graduation Year column, enter the year the faculty/staff member graduated from the school.

21. In the Comments column, enter additional comments about the education information.

22. In the Certification column, select the type of certification the faculty/staff member obtained.

23. In the Issue date column, enter the date the certification was issued.

   **Note:** If a faculty/staff member is terminated, access the record and mark **Terminated on** and enter a date. You can enter the reason for termination in the **Reason** field.

24. In the Expiration Date column, enter the date the certification expires.

25. In the State column, enter the state that issued the certification.

26. In the Comments column, you can enter additional comments about the certification.

27. In the Date hired field, enter the date the faculty/staff member was hired.

28. To save the record and return to the Faculty/Staff page, click **Save and Close**.
Adding Addresses

**Tip:** You can print a label or envelope directly from a faculty/staff record using the button on the toolbar. For more information about formatting labels or envelopes, see the *Mail Guide*.

On the Addresses tab, you can add and maintain multiple addresses for faculty/staff records. Each record has one primary address, which you designate on the Addresses tab. The primary address appears on the Bio 1 tab. You can maintain additional addresses on the Addresses tab.

You can add an address on the Bio 1 or the Addresses tab. When you add an address on the Bio 1 tab, it automatically becomes the primary address for that record. When you add an address on the Addresses tab, you can designate the address as primary or leave it as an alternate or secondary address.

**Adding an address**

**Note:** To edit an existing address, select the address in the grid and click **Open** on the action bar. When you make your changes, the program updates the addresses on the open record and on the linked records.

1. From an open faculty/staff record, select the Addresses tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.

**Note:** You can also access the Address screen by clicking the **Address** button on the Bio 1 tab.
2. On the action bar, click New Address. The Address screen appears.

![Address screen](image)

3. In the Address type field, select the type of address. Address types are defined in Configuration.

4. In the Country field, select the country of the address.

5. In the Address box and the City, State, and ZIP fields, enter the address.

6. In the contact grid, in the Contact Type column, select a contact method. In the Contact Number column, enter a phone number or Web or email address.

7. The Link column indicates whether the information is linked to another record in the database. If you copy and link the faculty/staff member’s address, you can select “Shared” or “Not Shared”. If the information is not linked to another record, the column defaults to “Not Shared” and is for informational purposes only. For more information about linking addresses and contact information, see “Copying and Linking Addresses” on page 93.

8. If you do not want the address block that prints linked with the individual address fields, unmark Synchronize with individual address fields. If you unmark this checkbox, you must manually update the printed address in the Address as it will be printed box.
9. Select the Details tab.

10. In the **Description** field, enter a description for the address.

11. In the **County** and **Region** fields, select address information. Selections for these fields are defined in **Configuration**.

12. In the **CART** field, enter the carrier route.

13. If this is the primary address, mark **Primary address**. If only one address appears on the record, the program automatically marks the checkbox, and you cannot unmark it. Each record can have only one primary address.

14. In the **This is a valid address from [ ] to [ ]** fields, enter the dates for which this is a valid address.

15. If the address is seasonal, mark **This is a seasonal address from [ ] to [ ]** and enter the dates.

16. To add attributes to the address, select the Attributes tab. With address attributes, you can add any additional information you need to maintain about this particular address, such as special mailing instructions.
17. In the **Send [ ] to this address** field, select “All mail”, “Selected mail”, or “No mail”. If you select “All mail” or “No mail”, you cannot add attributes to the address. For more information about entering attributes, see “Adding an attribute” on page 108.

18. To save the address and return to the Addresses tab, click **OK**. The new address appears in the grid.

### Copying and Linking Addresses

To help eliminate data entry errors, you can either copy or copy and link an address to a faculty/staff record from another record. When you copy an address, you are merely pasting a separate copy of the address directly from a record onto the faculty/staff record. Changes to the address on the original record are not made to the faculty/staff record, or vice versa.

**Note:** To edit an existing linked address, you can open only one record, make your changes, and the program updates the addresses on the linked records.

When you copy and link an address, you are inserting a copy of the address that is still tied to the original address. Changes you make to the address on either record are made automatically to the other record.

- **Copying and linking an address**

  **Note:** While this procedure demonstrates copying and linking a faculty/staff address to another faculty/staff member, you can use it as a model for copying and linking addresses to other record types.

1. From an open faculty/staff record, select the Addresses tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.
2. Select the Home address and click Open on the action bar. The Address screen appears.

3. To copy the address from the faculty/staff record, click Copy Address From. The Open screen appears. Locate the record and click Open. For more information about searching for records, see the Program Basics chapter of the Program Basics Guide.

The Addresses screen appears.

4. In the Copy? column, mark the checkbox for each address to copy.

5. To link the addresses, mark Link these addresses.

Note: When you link addresses, information is shared. A contact type marked “Not Shared” in the Link? column cannot be copied or linked.
6. To copy the address onto the record, click **Copy Now**. You return to the Address screen, and the copied address information appears. The **Link?** column indicates contact types are linked.

7. To save the information and return to the Addresses tab, click **OK**. The copied address appears in the grid.

### Unlinking Addresses

You may find it necessary to unlink addresses. When you stop sharing a linked address, you remove links between the records. Changes you make to the address on either record are no longer made automatically to the other record. Each address still has the potential to be shared.

To unlink only a contact type, select “Not Shared” in the **Linked?** column.

- **Unlinking an address**
  1. From an open faculty/staff record, select the Addresses tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.
2. Select the address to unlink and click Open. The Address screen appears.

3. Click Shared Addresses. The Shared Addresses screen appears displaying the records the address is linked to.

4. Click Stop Sharing This Address. The faculty/staff member’s address is no longer linked to the others.

5. To return to the Address screen, click Close. The address still appears but is no longer linked.

6. To save the new information and return to the Addresses tab, click OK.

Managing Addressees and Salutations

Note: When you stop sharing an address, the link is broken between only the faculty/staff member and the records listed on the Shared Addresses screen. If the records listed have addresses linked to each other, those links are not broken.

Glossary: An addressee is a name as it appears on labels, reports, and letters. A salutation is the greeting used in letters and other mailings. For more information about creating addressees and salutations, see the Configuration Guide for Admissions Office.
On the Addressees/Salutations tab of a faculty/staff record, you can select the primary addressee to appear on labels, envelopes, and letters. Formats for addressees and salutations are defined in Configuration. To maintain consistency in your data entry, we recommend you select predefined addressees and salutations.

An addressee is usually formal, such as Mrs. Margaret Anne Andrews. A salutation, on the other hand, is how you greet a faculty/staff member in correspondence. Depending on the type of mailing, you may use a formal or informal salutation. For example, you may use Mrs. Andrews on a letter about financial aid or Margaret Anne on a letter about an open house. The more addressees and salutations you maintain for your faculty/staff members, the more flexibility you have in addressing and greeting them.

- **Assigning a primary addressee and salutation**

  **Note:** To maintain consistency, we recommend selecting addressees and salutations already defined in Configuration.

  1. From an open faculty/staff record, select the Addressees/Salutations tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.

  2. In the **Primary addressee** field, select the addressee format to appear on labels, envelopes, and letters.

  3. In the **Primary salutation** field, select the salutation format to appear on mailings.

  4. To save the addressee and salutation, click the **Save** button on the toolbar.
Adding an additional addressee/salutation

1. From an open faculty/staff record, select the Addressee/Salutations tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.

2. In the **Type** column, select a type of addressee or salutation.

3. In the **Addressee/Salutation** column, enter the name as it should appear on labels, letters, reports, and mailings when using this addressee/salutation.

4. To save the addressee/salutation, click the **Save** button on the toolbar.

Adding Visa/Passport Information

With faculty/staff records, you can record and maintain visa and passport information, which is especially useful for teachers who may teach abroad or travel abroad, or if your school is not located in the United States.

Adding visa/passport information

1. On the Bio 1 tab of an open faculty/staff record, click **Visa/Passport**. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83. The Visa/Passport information screen for the selected faculty/staff member appears.

2. In the **Visa status** field, select the status of the faculty/staff member’s visa.

3. In the **Visa number** and **Visa type** fields, enter the number of the visa and select the type of visa the faculty/staff member has.

4. In the **Visa issued** and **Visa expires** fields, enter the issue and expiration dates of the visa.

**Note:** Selections in the Visa status and Visa type fields are defined in Configuration.
5. In the **Passport number** and **Passport expires** fields, enter the number and expiration date of the passport.

6. In the **Visa status** field, select the status faculty/staff member’s visa.

7. In the **Visa number** and **Visa issued** fields, enter the correct visa number and date issued.

8. In the **Visa type** field, select the type of visa.

9. In the **Passport number** and **Passport expires** fields, enter the correct passport number and expiration date.

10. To save the information and return to the Bio 1 tab, click **OK**.

### Adding Demographic Information

**Glossary:** Demographics are the characteristics of human populations. In *Admissions Office*, you can follow the demographics of your student body and use the information for queries and reports.

With faculty/staff records, you can record the demographics of your employees. By maintaining demographic information, you can create queries and reports that provide both specific and broad information about your staff population. For example, some schools create reports of religions and ethnicity of its employees to better understand and gauge the diversity of the faculty and staff.

**Note:** To edit existing demographic information, open the faculty/staff record, make your changes, and save the record. For more information, see “Finding and Opening Faculty/Staff Records” on page 83.
Adding demographic information

1. On the Bio 1 tab of an open faculty/staff record, click Demographics. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83. The Demographic information screen appears.

2. In the Is Hispanic/Latino field, select “Yes” or “No”.

3. In the Ethnicity field, click the binoculars to access a Selected Ethnicities screen. From this screen, select one or multiple ethnicities for the faculty/staff member.

When integrating, the Ethnicity field in The Raiser’s Edge synchronizes with the first ethnicity value listed in the Ethnicity field in The Education Edge. Note that if the second value listed in the Ethnicity field in The Education Edge matches the Ethnicity field in The Raiser’s Edge, the second value will be deleted.

4. Click OK. You return to the Demographic information screen.

5. In the Religion and Church affiliation fields, select the faculty/staff member’s religion and church affiliation.

6. In the Citizenship field, select the country of which the faculty/staff member is a citizen.

7. In the First language and Language spoken at home fields, select the primary language spoken by the faculty/staff member and the language spoken in her home.

8. In the Years in US field, enter the number of years the faculty/staff member has lived in the United States.
9. In the **Height** and **Weight** fields, enter the faculty/staff member’s height and weight.

10. In the **Marital status** and **Maiden name** fields, select the faculty/staff member’s marital status and enter a maiden name, if applicable.

11. To save the information and return to the faculty/staff record, click **OK**.

### Adding Photos

You can add a photo to a faculty/staff record. The photo on a faculty/staff record in *Admissions Office* is shared with the faculty/staff record in *Registrar’s Office* and the individual record in *Student Billing*. If you change the photo in one program, the new photo appears in all programs.

- **Adding a photo**

  1. On the toolbar of an open faculty/staff record, click the **Photo** button. The photo screen appears.

    ![Photo Screen](image)

    2. To add a photo, click **Change Picture**. Locate the photo and click **Open**. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*. You return to the photo screen and the selected photo appears.

    **Note:** To remove the picture, click **Remove Picture**.
3. To size the photo to fit in the window, mark **Size to fit window.**

4. To save the photo and return to the faculty/staff record, click **OK.**

### Adding Relationships

Relationships are familial, social, or business associations with other persons or with organizations. By adding relationships, you improve the depth and consistency of your records and improve processes like mailings and assigning actions.

On faculty/staff records, you can create personal relationships with applicants, individuals, or other faculty/staff members. If you have *Registrar's Office*, you can also create personal relationships with students. For example, a faculty/staff member can have children who are applicants and a spouse who is an individual or faculty/staff member.

You can also add business relationships on faculty/staff records. For example, a faculty/staff member may be a contact for an organization. By creating a business relationship with the organization, you can associate the faculty/staff member with actions and recommendations for the organization and add the faculty/staff member to organization mailings.

You add relationships to a faculty/staff record on the Relationships tab. Entries on the Relationships tab affect other areas of the program. For example, if you add a relationship with an applicant, the faculty/staff member also appears as a relationship on the applicant’s record.

- **Adding a personal relationship**
  1. From an open faculty/staff record, select the Relationships tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.
2. In the Show field, select “Personal relationships”.

3. Click Add Relationship on the action bar. The Open screen appears. Locate the record and click Open. For more information about using the Open screen, see the Program Basics chapter of the Program Basics Guide. You return to the Relationships tab, and the selected relationship appears in the grid.

4. In the Relationship column, select how this person is related to the faculty/staff member.

5. In the Reciprocal Relationship column, select how the faculty/staff member is related to this person.

6. If the relation is an emergency contact for the faculty/staff member, mark the checkbox in the Emergency Contact column.

7. If the faculty/staff member is to receive the relation’s report cards, mark Receives Report Cards.

8. If the relation lives with the faculty/staff member, mark Lives with Faculty/Staff.

9. If the faculty/staff member is to appear on the relation’s transcripts, mark Show on Transcripts.

   **Note:** If the relation is the faculty/staff member’s spouse, mark the checkbox in the Spouse column. If you mark the checkbox, the Spouse fields on the Bio 1 tab of both records are completed with the name. Only one relationship can be marked as the spouse.

10. In the Notes field, enter any additional information about the relationship.

11. To save the record and return to the Faculty/Staff page, click Save and Close.

   ▶ **Adding a business relationship**

   1. From an open faculty/staff record, select the Relationships tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.
2. In the **Show** field, select “Business relationships”.

3. Click **Add Relationship** on the action bar. The Open screen appears. Locate the record and click **Open**. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*. You return to the Relationships tab, and the selected relationship appears in the grid.

4. In the **Relationship** column, select how this organization is related to the faculty/staff member.

5. In the **Reciprocal Relationship** column, select how the faculty/staff member is related to this organization.

6. You can mark one business relationship as the primary business relationship for the faculty/staff member. When you mark the checkbox in the **Primary Business** column for a relationship, the program adds the organization’s address to the Addresses tab of the faculty/staff record. This address is automatically linked with the address on the organization record.

   **Note:** If you later unmark **Primary Business** for a relationship, the organization’s address is also removed from the Addresses tab of the faculty/staff record, unless you have marked **Primary?** for the address. In that case, the address remains but is no longer connected to a business relationship.

   If you need to change phone numbers or add phone extensions for each person at the organization, open the address record created after marking **Primary Business**, unshare the phone, and enter the correct number.

7. In the **Position** column, enter the job or title of the faculty/staff member at the organization.

8. To print the position on mailings, mark the checkbox in the **Print?** column.

9. In the **Department** column, select the department to which the faculty/staff member belongs at this organization.

10. If the faculty/staff member is a contact for the organization, mark the checkbox in the **Contact** column. In the **Contact Type** column, select the type of contact the faculty/staff member is at the organization. If this is the primary contact for the organization, mark the checkbox in the **Primary Contact** column.

11. In the **Notes** field, enter any additional information about the relationship.

12. To save the record and return to the Faculty/Staff page, click **Save and Close**.
Viewing the relationship tree

1. To view a visual representation of a faculty/staff member’s relationships, select Faculty/Staff, Relationship Tree.

![Relationship Tree for Mrs. Margaret Anne Andrews](image)

2. To open a relation’s record, select the name and click Open.
3. To search for a relation in the tree, click Find.
4. To print the relationship tree, click Print.
5. To expand all of the relations in the tree at once, click Expand All.
6. To close the relationship tree and return to the faculty/staff record, click Close.

Adding Actions

**Note:** If you have Registrar’s Office, you can assign faculty/staff members to complete actions for students.

The Actions tab records any task to be completed for a faculty/staff member. Actions, for example, can include a phone call to an applicant. If you have the security rights, you can add, edit, and delete actions from this tab.

You can assign an action to another person or yourself, and the program reminds you when the action is due. For example, if the admissions counselor needs to call to remind an applicant of an interview, you can assign the phone call as an action. When the phone call is due, the program reminds her by adding an action reminder to the Home page. You can also create a letter about the action directly from the action record.

When you create a letter using the Letter menu or Letter button on a faculty/staff record, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 130.

- Adding an action

**Note:** If another user already has the faculty/staff record open, you get a message telling you your changes will not be saved. However, you can add and save an action on a record already in use.
1. From an open faculty/staff record, select the Actions tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.

2. On the action bar, click **New Action**. The New Action screen appears. If you have multiple schools defined in **Configuration**, in the **School** field, select a school.

3. In the **Select action for** field, click the binoculars to select a record.

4. In the **School** field, select the school for which to associate this action.
5. In the **Action type** field, select the type of action to be taken, for example, “Phone call” or “Meeting”.

6. In the **Start date**, **End date**, and **Time** fields, enter the dates and times the action is to be taken and finished.

7. In the **Priority** field, select “Low”, “Normal”, or “High”.

8. To send a reminder to another user, mark **Send reminder to** and select a user’s name. In the fields directly below **Set reminder to**, to determine when to send the reminder, in the fields, enter a number and select “Days”, “Weeks”, or “Months”.

9. In the **Assigned to** field, select the person assigned to complete the action. The program automatically completes the **Assigned to type** field from the information on the record you select. The action appears on the record of the person selected in the **Assigned to** field.

10. In the **Location** field, click the binoculars to select a location.

**Note:** When the action is complete, open the record and mark **Action completed on**. The program automatically enters the current date.

11. In the **Action status** field, select the status of the action, for example, “Pending”.

**Note:** You create action letters in **Configuration**. For more information, see the **Configuration Guide for Admissions Office**.

12. You can print a letter for the person selected in the **Select action for** field with information about the action.
   - To print a predefined action letter, in the **Action letter** field, select a letter format and click the **Letter** button. A processing screen appears as the letter merges and then **Word** opens displaying the merged letter.
   - To print a quick letter, click the **Letter** button. **Word** opens to a document with information merged into the heading. The rest of the document is blank so you can create a custom letter “on the fly”. For more information about quick letters, see “Creating a Quick Letter for a Faculty/Staff Member” on page 130.

**Note:** If you save a letter to an action, a **Word** icon appears in the status bar of the action record.

13. On the **Word** document toolbar, you can click **Save this document to the action** to save the letter to the database with the action record. You can later access the letter from the action record.

14. To close the letter and return to the action record, click **Return to Action for <Record>**.

15. Once the letter is sent, open the record and mark **Action letter sent on**. The program automatically enters the current date.

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

**Note:** Your selections in the **Current status** and **Status date** fields update the same information on the applicant’s Bio 1 and Applications tabs.

17. If the action is for an applicant, to change the applicant’s status based upon completion of this action, mark **Update status information** and select the status to be applied once the action is complete. If you mark this checkbox, when the action is complete, the program makes the status change in the **Current status** field on the Bio 1 and Applications tab of the applicant record.

18. To update the **Status date** field upon completion of the action, select “Use completed date”, “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”.
   - To make no change to the status date, leave the field blank.
The program completes the **Status as of start date** field 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 record.

20. To add attributes or notes to the action, click the Attributes/Notes tab. For more information about attributes and notes, see “Adding an attribute” on page 108 and “Adding a note” on page 110.

21. To save the action and return to the Actions tab, click **Save and Close**. The new action appears in the grid.

## Managing Attributes, Notes, and Media

You can further define a faculty/staff record by adding information to the Attributes, Notes, and Media tabs. On the Attributes tab, you can add characteristics to the record and group information based on a common theme, which is useful for reporting. On the Notes tab, you can record special information about staff members you may need later. On the Media tab, you can store various media objects, including images, documents, and video or sound files. For example, you can store a scanned teaching certificate or driver’s license.

### Adding Attributes

**Note:** Attributes are defined in *Configuration*. For information about attributes, see the *Configuration Guide for Admissions Office*.

The Attributes tab stores additional information about a faculty/staff member. You can use attributes to define specialized information for records, such as information you want to record, but for which no field is available. You can filter attributes to use in other areas of *Admissions Office*, such as Query and Reports.

You can define attributes using a variety of data types created in *Configuration*. If you make a faculty/staff attribute required, a message appears reminding you to add it when creating a faculty/staff record. For more information about defining attributes, see the *Configuration Guide for Admissions Office*.

- **Adding an attribute**

**Warning:** You must define attribute types in *Configuration* before you can add them to a faculty/staff record. For more information about attributes, see the *Configuration Guide for Admissions Office*. 
1. From an open faculty/staff record, select the Attributes tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.

2. In the Attribute Type column, select an attribute type.

3. In the Description column, select or enter a description of the attribute.

4. In the Date column, enter a date to record when you add the attribute.

5. If this attribute type is required on a faculty/staff record, the program automatically marks the checkbox in the Required column. You cannot edit this on the Attributes tab.

6. In the Comments column, enter any additional comments or more detailed information about the attribute. You can enter free-form text in this column.

7. To save the attribute, click the Save button on the toolbar.

**Adding Notes**

The Notes tab makes it easy to record and maintain information about a faculty/staff member. For example, you can add a note to record special information about a person or organization, notes from a conversation or phone call, or contact information you may need later.
For each note, you enter a date, description, title, and author. You enter the body of the note in a text box that holds an unlimited amount of free-form text. You can designate note types, such as “Confidential” or “Personal”, and use those designations to run queries, reports, and establish type-based security.

You can set up securities so only certain users can view particular notepad types. This is especially useful when the information is of a sensitive nature and you want to ensure that only you can access the information. For more information about security, see the Security chapter of the Administration Guide for The Education Edge.

- **Adding a note**

  **Note:** To edit an existing note, select the note in the grid and click **Open** on the action bar.

  1. From an open faculty/staff record, select the Notes tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.
2. Click **New Note** on the action bar. The New Note screen appears.

3. In the **Type** field, select a notepad type.
4. In the **Description** and **Title** fields, enter a description and title for the note.
5. In the **Author** field, select your user name.

**Note:** You can use the formatting selections on the toolbar to format the note.

6. In the text box, enter notes to associate with the faculty/staff record.
7. To save the note and return to the Notes tab, click **Save and Close**. The new note appears in the grid.

### Adding Media

On the Media tab, you can add media objects to a faculty/staff record. Media can include photographs, scanned newspaper articles and publications, recommendations, video files, and audio files.

To reduce the size of your database, you can create a link to the media file. Be aware that if the original file is moved or deleted, the link will not work. The linked file must be in a location on your network where other users can access it.

- **Adding a new media object**

**Glossary:** Media is information about a record such as a photograph or scanned newspaper article. You can create new media objects or retrieve existing media objects to save in the record.
1. From an open faculty/staff record, select the Media tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.

2. On the action bar, click **New Media**. The Insert Object screen appears.

3. To create a media file, mark **Create New**.

4. In the **Object Type** box, select a media object. The object types that appear depend on the programs you have installed.

5. To display the media object as an icon, mark **Display As Icon**.

6. Click **OK**. Depending on the kind of media you are creating, either the New Media screen appears, or the program that created the file type opens.
   - If the program for creating the media file type opens, create the media file. After you save and close the file, the New Media screen appears.
7. On the New Media screen, in the **Date** field, enter the date you add the media object.
8. In the **Type** field, select a media type.
9. In the **Description** and **Title** fields, enter a description and name for the media object.
10. In the **Author** field, select your user name.

**Note:** If you marked **Display As Icon** on the Insert Object screen, the object icon appears in the bottom of the New Media screen. If you did not mark the checkbox, a blank box appears.

11. To save the media object and return to the Media tab, click **Save and Close**. The media information appears in the grid.
Adding an existing media object

1. From an open faculty/staff record, select the Media tab. For information about opening records, see “Finding and Opening Faculty/Staff Records” on page 83.

2. Click **New Media**. The Insert Object screen appears.

3. To add a media object using a previously-created file, mark **Create from File**.

4. Click **Browse** to search for the file. Once you locate and select the file, click **Open**. You return to the Insert Object screen, which now displays the file path.

5. You can mark **Link** so that any change you make to the source file is automatically reflected on the Media tab. If you do not mark **Link**, the object is embedded.

6. Click **OK**. The New Media screen appears displaying the selected media object.

7. In the **Date** field, enter the date you add the media object.

8. In the **Type** field, select a media type.

9. In the **Description** and **Title** fields, enter a description and name for the media object.
10. In the **Author** field, select your user name.

11. To save the media object and return to the Media tab, click **Save and Close**. The media information appears in the grid.

### Viewing History of Changes

The History of Changes tab displays an historic record of key changes made to the faculty/staff record. For example, if you change the faculty/staff member’s address information, the change appears on the History tab.

The information is for informational purposes only. You cannot add or edit data on the History of Changes tab.

1. **Viewing a faculty/staff member's history of changes**

   From an open faculty/staff record, select the History of Changes tab. The grid displays **Item Changed**, **Previous Setting**, **New Setting**, **Changed On**, and **Changed By** columns. The History of Changes tab is for informational purposes only.

   1. Click **Save and Close** to return to the Faculty/Staff page.

### Creating a Letter from a Faculty/Staff Record

If you have **Word 2000** or **Word XP** installed on your computer, you can use the **Letter** menu to quickly and easily print a single letter for a faculty/staff member directly from the faculty/staff record, rather than creating it in **Mail**.

**Note:** The **Letter** menu displays letter formats created in **Configuration** and **Records**. For more information about creating letters in **Configuration**, see the **Configuration Guide for Admissions Office**.

On the **Letter** menu, you can select a predefined letter format or select **Create a New Letter Format** to create a new one. Letter formats are associated with a faculty/staff export and a simple or conditional **Word** merge file. For more information, see “Creating a Merged Letter for a Faculty/Staff Member” on page 116.

You can also create a quick letter for a faculty/staff member by selecting **Write a letter** from the **Letter** menu. This generates a **Word** document with basic faculty/staff information merged automatically into your letter. The rest of the document is blank so you can write a custom letter “on the fly”. For more information, see “Creating a Quick Letter for a Faculty/Staff Member” on page 130.

You can select **Modify Letter Menu** to organize and edit saved letter formats. For more information, see “Organizing and Editing Letter Formats” on page 131.

When a letter is complete, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 130.
Creating a Merged Letter for a Faculty/Staff Member

Merged letters combine data from an export file with a simple or conditional Word merge file. A simple merge uses a single form letter. For example, you can create a form letter with information about certification courses the local college will offer next year. The body of the letter is the same for all faculty/staff, but the address section is customized with the recipient’s name, address, and primary salutation.

A conditional merge produces a letter using one of several form letters, based on conditions you define. For example, you can create form letters for faculty members who teach history, math, or science. Using the conditional merge process, you define conditional statements that match teachers with the letter they should receive based on the subject they teach. For more information about setting up exports and Word merges, see the Export Guide.

Creating a new simple merge letter from a faculty/staff record

Note: You can also create a new letter format by clicking the down arrow next to the Letter button on the toolbar, and selecting Create a New Letter Format.

1. From the menu bar of an open faculty/staff record, select Letter, Create a New Letter Format. The New Faculty/Staff Letter screen appears.

2. In the Letter description field, enter a description for the letter. This description appears in the Letter menu and Faculty/Staff Letters in Configuration.

Note: In the Export format field on the Open screen, select “Blackbaud Simple Word Merge”.
3. In the Blackbaud Word Merge export field, you can associate this letter with a Word merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

![Open screen](image)

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

![Create a New Export](image)

The **What type of export do you want to create?** box displays “Faculty/Staff” by default.

**Tip:** You can set a default export format in Options.

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

![Create New Export](image)
6. Click **Create Now**. The New Faculty/Staff Export screen appears.

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

You must have the appropriate security rights to output credit card, bank account, and Social Security numbers. If you have rights, when you add these merge fields, a screen appears where you can select whether the numbers should be masked or unmasked in the letter. If you do not have rights, these numbers are always masked in the letter. For more information, see the Security chapter of the *Administration Guide* for *The Education Edge*. 
8. When finished selecting fields, click **Edit word merge file**. *Word* opens automatically to a blank document to use to create your letter.

9. Type the letter in *Word*. To insert a field from *The Education Edge*, select **Insert Education Edge field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

10. When you have finished creating the letter, click **Save and return to EE7 to Merge**. You return to the New Faculty/Staff Export screen.

11. Click **Save and Close**. The Save Export As screen appears.
12. Enter a name and description of the export and click **Save**. You return to the New Faculty/Staff Letter screen.

13. To save and close the New Faculty/Staff Letter screen, click **OK**.

**Note:** Once a new letter format is added to the Letter menu, you can access it from any faculty/staff record to quickly print the same letter for that faculty/staff member. Letter formats are also added to Faculty/Staff Letters in *Configuration*.

14. To print the letter you just created, you must first add it to the Letter menu. Select **Letter, Modify Letter Menu**. The Modify Letter Menu screen appears.

15. Click **Search** to access the Search Faculty/Staff Letters screen.
16. Select the letter to add and click **Open**. The Search Faculty/Staff Letters screen closes and the new letter appears in the list.

![Modify Letter Menu](image)

17. Click **Close**. You return to the faculty/staff record.

18. From the menu bar select **Letter** and then select the new letter from the menu.
A processing screen appears as the letter generates and then *Word* opens displaying the merged letter.

![Letter with merged text](image)

**Note:** You can click **Save this document as an action** to save the letter as an action. For more information, see “Saving a Letter as an Action” on page 130.

19. Click **Print**.
20. To close the letter and return to the faculty/staff record, click **Return to <Faculty/Staff>**.

**Creating a new conditional merge letter from a faculty/staff record**

1. From the menu bar of an open faculty/staff record, select **Letter, Create a New Letter Format**. The New Faculty/Staff Letter screen appears.

2. In the **Letter description** field, enter a description for the letter. This description appears in the **Letter** menu and Faculty/Staff Letters in **Configuration**.

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

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

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

The What type of export do you want to create? box displays “Faculty/Staff” by default.

Tip: You can set a default export format in Options.

5. In the Export format field, select “Blackbaud Conditional Word Merge”.
6. Click **Create Now**. The New Faculty/Staff Export screen appears.

![New Faculty/Staff Export interface](image)

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

![Available Fields tree view](image)
8. When finished selecting fields, click **Conditional merge wizard**. The Blackbaud Conditional Word Merge Wizard screen appears.

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

11. Based on the field you selected, select the condition and value for the letter. For example, if you are using Department as the field, select “equal to” in the **Condition** field and “Mathematics” in the **this value** field.

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

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

14. Type the letter in **Word**. To insert a field from *The Education Edge*, select **Insert Education Edge field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

15. When you have finished creating the letter, click **Save and return to EE7 to Merge**. You return to the Conditional Merge Document Document screen.
16. Click OK. You return to the Word Merge Wizard and the new condition appears in the grid.

17. To select more conditions, click Back and repeat steps 10-16.
18. When finished selecting conditions, click Finish. You return to the New Faculty/Staff Export screen.
19. Click Save and Close. The Save Export As screen appears.

20. Enter a name and description of the export and click Save. You return to the New Faculty/Staff Letter screen.
21. To save and close the New Faculty/Staff Letter screen, click OK.

**Note:** Once a new letter format is added to the Letter menu, you can access it from any faculty/staff record to quickly print the same letter for that faculty/staff member. Letter formats are also added to Faculty/Staff Letters in Configuration.
22. To print the letter you just created, you must first add it to the Letter menu. Select Letter, Modify Letter Menu. The Modify Letter Menu screen appears.

23. Click **Search** to access the Search Faculty/Staff Letters screen.

24. Select the letter to add and click **Open**. The Search Faculty/Staff Letters screen closes and the new letter appears in the list.

25. Click **Close**. You return to the faculty/staff record.
26. From the menu bar select **Letter** and then select the new letter from the menu.

![Screenshot of the Faculty/Staff interface showing how to select a letter](image1.png)

**Note:** You can click **Save this document as an action** to save the letter as an action. For more information, see “Saving a Letter as an Action” on page 130.

A processing screen appears as the letter generates and then **Word** opens displaying the merged letter for the condition that matches the faculty/staff member.

![Screenshot of the merged letter](image2.png)

27. Click **Print**.

28. To close the letter and return to the faculty/staff record, click **Return to <Faculty/Staff>**.
Creating a Quick Letter for a Faculty/Staff Member

You can create a quick letter for a student by selecting **Write a letter** from the **Letter** menu. A quick letter does not require a merge or export file. A **Word** document appears with the current date, faculty/staff name, and primary address merged automatically into your letter. The rest of the document is blank so you can write a custom letter “on the fly”.

- **Creating a quick letter for a faculty/staff member**

**Tip:** You can also click the **Letter** button on the toolbar to write a quick letter.

1. From the menu bar of a faculty/staff record, select **Letter, Write a Letter**.
   A processing screen appears as the letter generates and then the **Word** document appears with the current date, faculty/staff name, and primary address in the header.

```
Thursday, May 05, 2005
Hunter Adams
1330 Orangeburg Road
Charleston, SC 29405

Dear Hunter Adams,

```

2. Write the letter’s text and then print.
3. To save the letter as an action, click **Save this document as an action**. For more information, see “Saving a Letter as an Action” on page 130.
4. To close the letter and return to the faculty/staff record, click **Return to <Faculty/Staff>**.

**Saving a Letter as an Action**

**Note:** You can also create action letters from the faculty/staff member’s Action tab. For more information, see “Adding Actions” on page 105.

When a letter is complete, you can save it as an action. This creates an action record for the faculty/staff member with the current date as the **Start date** and **Action completed on** date. The description of the action is “Letter to <Faculty/Staff>”. To view the action, select the Actions tab of the faculty/staff record, and open the action.

In business rules, you must set the default action type for each record type. You cannot save a letter as an action until a default action type is selected. For more information about business rules, see the **Configuration Guide for Admissions Office**.

- **Saving a letter as an action**

  1. From an open letter in **Word**, click **Save this document as an action** on the toolbar. A message appears, letting you know the action was added.
  2. Click **OK**.
3. To close the letter and return to the faculty/staff record, click Return to <Faculty/Staff>.

Organizing and Editing Letter Formats

On the Modify Letter Menu screen, you can select the letter formats that appear in the Letter menu and organize how they appear. You can also open and edit existing letter formats.

- **Organizing the Letter menu**

  1. From the menu bar of a faculty/staff record, select Letter, Modify Letter Menu. The Modify Letter Menu screen appears.

     ![Modify Letter Menu](image)

     The Show these letters in the letter menu box lists the faculty/staff letters selected to appear in the Letter menu.

     **Note:** Once a new letter format is added to the Letter menu, you can access it from any faculty/staff record to quickly print the same letter for that faculty/staff member. Letter formats are also added to Faculty/Staff Letters in Configuration.

     - To add a letter to the menu, click Search to access the Search Faculty/Staff Letters screen. Select the letter to add and click Open. The Search Faculty/Staff Letters screen closes and the new letter appears in the list.
     - To create a new merged letter, click New. The New Faculty/Staff Letter screen appears. For more information about creating merged letters, see “Creating a Merged Letter for a Faculty/Staff Member” on page 116.
     - To open a letter format, select the letter and click Open. The Faculty/Staff Letter screen appears. You can click Edit Export to view or modify the letter’s merge and export files. For more information about editing a saved letter format, see “Editing a saved letter format” on page 132.
     - To remove a letter format from the list, select the letter and click Remove. The letter is removed from the list and will no longer appear in the Letter menu.
     - To add a horizontal line between letters in the Letter menu, select a letter and click Separator. A line appears below the selected letter.
     - To change the order of letters in the Letter menu, select a letter and click Up or Down.

  2. Click Close to return to the faculty/staff record.
Editing a saved letter format

1. From the menu bar of a faculty/staff record, select **Letter, Modify Letter Menu**. The Modify Letter Menu screen appears.

2. Select the letter to edit, and click **Open**. The Faculty/Staff Letter screen appears.
3. Click **Edit Export**. The export screen appears. On this screen, you can add additional merge fields to use in your letter.

4. To edit the merge document, on the toolbar, click **Edit word merge file**. *Word* opens displaying the merge document.

5. You can delete, add, or replace any of the letter's text.

6. To remove a merge field, select the field in the document and click **DELETE** on your keyboard.

7. Click **Insert Education Edge field** to select a replacement merge field.

8. On the toolbar, click **Save and return to EE7 to Merge**. You return to the export screen.

9. On the toolbar, click **Save and Close**. You return to the Faculty/Staff Letter screen.

10. Click **OK**. You return to the Modify Letter Menu screen.

11. Click **Close**. You return to the faculty/staff record.
Individuals

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In *Admissions Office*, an individual is a person affiliated with your school and is not a student, applicant, or faculty/staff member. For example, you can use individual records to record information for relations of applicants or faculty/staff members, potential applicants and faculty/staff members, contacts at other organizations, persons submitting recommendations for applicants, or volunteers.

If you have *Registrar’s Office* and *Student Billing*, these programs work with *Admissions Office* so that individual information is shared in the same database for the admissions office, registrar’s office, and billing office. An individual record created or deleted in *Admissions Office* is also created or deleted in *Registrar’s Office* and *Student Billing*. Some individual information, such as biographical, contact, and address information is shared across the programs so if you make changes to the record in one program, the changes appear in all programs. For a complete list of shared features, see the *Integrating Student Billing with The Education Edge* guide.

Individual records are flexible. Once an individual is entered into the program, if the status of the person changes and she becomes an applicant or faculty member, you can convert the individual record to an applicant or faculty/staff record. If you have *Registrar’s Office*, you can convert the individual to a student.

### Accessing Individual Records

**Glossary:** An individual is a person affiliated with your school and is not a student, applicant, or faculty/staff member.

Because records are such an important part of *Admissions Office*, we have placed all record types on the Records page so you can quickly access them. Think of *Records* as a filing cabinet. You open a filing cabinet to pull out a record, or file. When you open *Records*, you can directly access several record types, including individual records. To access individuals, click *Records* on the navigation bar, then click *Individuals*. The Individuals page appears.
Consider the Individuals page the starting point for individual records. From this page, you can add a new individual or open an existing record. You can edit individual record options by clicking Edit options for Individuals. For more information about options, see the Options chapter in the Program Basics Guide.

To save time when searching for a specific record, you can use the Search for an Individual by Individual name field. The Individuals page lists recently accessed records. You can open a record in the list by clicking the individual’s name.

Finding and Opening Individual Records

When you click Open an Individual on the Individuals page, the Open screen for individual records appears. The Open screen has a number of filters you can use to narrow your search and quickly locate the record you want to open. The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results.

You can use wildcard characters if you are not sure how a word is spelled — use a question mark to replace a single character and an asterisk to replace a series of characters. For more information about wildcards, see the Query Guide.

Opening an individual record

Note: You can access the Open screen by selecting File, Open from Records.

2. Click Individuals. The Individuals page appears.
3. Click Open an Individual. The Open screen appears.
4. In the Find Individuals that meet these criteria frame, enter criteria you are using to search for the record.
5. After you enter search criteria, click Find Now. The program searches the database and displays all records meeting your criteria.
6. In the grid, select the individual to open.

7. Click **Open**. The individual record appears.

8. To save the record and return to the Individuals page, click **Save and Close**.
Managing Biographical Information

Individual records are comprised of multiple tabs that store specific information about people who are affiliated or have a relationship in some capacity with your school. When you initially add an individual record, you enter biographical and contact information about the person. If an individual’s information changes, you note those changes on the record.

Adding Individual Records

On the Bio 1 tab of an individual record, you enter personal details about an individual including name, gender, birth date, spouse, and contact information. You can record school information, as well as various demographic characteristics that your school can include in queries and reports. You can also add business relationships and addresses.

![New Individual](image)

**Note:** To rearrange the columns, click and drag a column heading to move it or right-click and select **Columns** from the submenu. On the Define Column Order screen, select the columns to appear in the order you want.

When you enter name information in the name grid on the Bio 1 tab, you are in Edit mode. While in this mode, you can enter an individual’s name, title and suffix.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Title 1</th>
<th>Title 2</th>
<th>Suffix 1</th>
<th>Suffix 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abernethy</td>
<td>Mary</td>
<td>Jane</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Once you enter the name information, click **OK** on the right side of the grid to access View mode.

| Mary Jane Abernethy | Edit |
View mode provides a clear and easy-to-read view of the individual’s name. If you need to change the name, click Edit or double-click the individual’s name access edit mode again.

If you enter common values repeatedly for multiple individual records, you can create a default set with common values to save time during data entry. The values are defaults only and you can change default information in the fields at any time. You can load default sets on an individual record by selecting Individuals, Load Defaults from on the menu bar. For more information about default sets, see the Program Basics chapter of the Program Basics Guide.

To prevent entering duplicate individual records, you can specify duplicate search criteria in Configuration. We strongly recommend that you set the business rule to check for duplicate individuals automatically. To search for a duplicate record from an existing record, access the menu bar and select Individuals, Duplicate Search. For more information about business rules, see the Configuration Guide for Admissions Office.

Adding an individual record

Note: To edit an existing individual record, open the record, make your changes, and save the record. For more information, see “Finding and Opening Individual Records” on page 137.

Some biographical information on an individual record in Admissions Office is shared with the individual record in Registrar’s Office and Student Billing. If you make changes to the record in one program, the changes appear in all programs.


Note: If you have only Admissions Office, some tabs and selections shown here may not appear on the individual record.

2. In the name grid, enter the individual’s full name. Last name is required. Once you enter the name, click OK to exit Edit mode in the name grid and enter View mode.

3. In the Record ID field, enter the individual’s identification number.

You can set a business rule to automatically generate individual IDs. If this business rule is marked, the ID is automatically generated when you save the record. Individual IDs must be unique. For more information about business rules, see the Configuration Guide for Admissions Office.
4. In the **Affiliation** field, select the individual's affiliation with your school.
5. In the **Gender** field, select the individual's gender.
6. In the **SSN** field, enter the individual's Social Security Number. The field automatically formats to the standard Social Security Number format of ###-##-#### when nine characters are entered. You can enter up to 18 alphanumeric characters. This field must be unique.
7. In the **Nickname** field, enter the individual's nickname or preferred name.
8. In the **Spouse** field, select the individual's spouse. The spouse must be an existing record. If you complete this field, a relationship is created on the Relationships tab. For more information about relationships, see “Adding Relationships” on page 155.
9. In the **Birth date** field, enter the individual's birth date. The **Age** field completes based upon the birth date entered.
10. In the **Birth country**, **Birth state**, and **Birth city** fields, enter the location the individual was born.
11. In the **Address** box and the **Country**, **City**, **State**, and **ZIP** fields, enter the individual's address. To enter additional details about this address, or to copy and link addresses, click the **Address** button. For more information about addresses, see “Adding an address” on page 142.
12. In the contact grid, you can enter multiple contacts for the individual. For example, you can add home, fax, and cellular phone numbers. In the **Contact Type** column, select the contact type. In the **Contact Number** column, enter the corresponding information, including phone numbers and email addresses. The **Link** column indicates whether the information is linked to another record in the database. If you copied and linked the individual's address, you can select “Shared” or “Not Shared”. If the information is not linked to another record, the column defaults to “Not Shared” and is for informational purposes only. For more information about linking addresses, see “Copying and linking an address” on page 145.
13. To prevent the individual from receiving emails from NetMail or Faculty Access for the Web, mark **Requests no email**. This applies to all email addresses on the individual's record.
   If an individual receives an email from NetMail or Faculty Access for the Web, a **Click here if you do not want to receive further email** link appears on the email. If the individual clicks this link, then clicks a **Remove** button to stop receiving emails from your school, a NetMail user can download and import this information to automatically mark the **Requests no email** checkbox on the individual's record.
14. To add educational information about the individual, click **School Info**. For more information about entering school information, see “Adding school information” on page 151.
15. To record demographic information about an individual, click **Demographics**. For more information about entering demographics, see “Adding demographic information” on page 152.
16. To add business relationships and addresses for the individual, click **Business**. For more information about entering business relationship information, see “Adding Business Relationship Information Using the Business Button” on page 153.
17. To save the record and return to the Individuals page, click **Save and Close**.

**Note:** You must have the appropriate security rights to view, add, delete, edit, or output Social Security numbers. If you do not have rights, these numbers are masked. For more information, see the Security chapter of the Administration Guide for The Education Edge.

**Tip:** You can press **F3** to enter the individual's first name in the **Nickname** field.

**Note:** If the individual is deceased, mark the **Deceased?** checkbox. If marked, the **Age** field does not appear.

**Note:** The address entered on the Bio 1 tab becomes the primary address by default. You can change the primary address designation on the Addresses tab.
Adding Addresses

**Tip:** You can print a label or envelope directly from an individual record using the button on the toolbar. For more information about formatting labels or envelopes, see the *Mail Guide*.

On the Addresses tab, you can add and maintain multiple addresses for individual records. Each record has one primary address, which you designate on the Addresses tab. The primary address appears on the Bio 1 tab. You can maintain additional addresses on the Addresses tab.

You can add an address on the Bio 1 or Addresses tab. When you add an address on the Bio 1 tab, it automatically becomes the primary address for that record. When you add an address on the Addresses tab, you can designate the address as primary or leave it as an alternate or secondary address.

Addresses on an individual record in *Admissions Office* are shared with the individual record in *Registrar's Office* and *Student Billing*. If you make changes to the record in one program, the changes appear in all programs.

- **Adding an address**

  **Note:** To edit an existing address, select the address in the grid and click **Open** on the action bar. When you make your changes, the program updates the addresses on the open record and on the linked records.

  1. From an open individual record, select the Addresses tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.

  ![Address Screen](image)

  **Note:** You can also access the Address screen by clicking **Address** on the Bio 1 tab.
2. On the action bar, click **New Address**. The Address screen appears.

![Address screen](image)

**Note:** You can use the address types to specify how an address is used. For example, you can create a “Correspondence” address type for addresses that are used only for correspondence.

3. In the **Address type** field, select the type of address. Address types are defined in *Configuration*.
4. In the **Country** field, select the country of the address.
5. In the **Address** box and the **City**, **State**, and **ZIP** fields, enter the address.
6. In the contact grid, in the **Contact Type** column, select a contact method. In the **Contact Number** column, enter a phone number or Web or email address.

**Note:** In the contact grid, you can enter multiple contacts for the individual, for example, home, fax, and cellular phone numbers and e-mail addresses.

The **Link** column indicates whether the information is linked to another record in the database. If you copy and link the individual’s address, you can select “Shared” or “Not Shared”. If the information is not linked to another record, the column defaults to “Not Shared” and is for informational purposes only. For more information about linking addresses and contact information, see “Copying and Linking Addresses” on page 145.

7. If you do not want the address block that prints linked with the individual address fields, unmark **Synchronize with individual address fields**. If you unmark this checkbox, you must manually update the printed address in the **Address as it will be printed** box.
8. Select the Details tab.

9. In the **Description** field, enter a description for the address.

10. In the **County** and **Region** fields, select address information. Selections for these fields are defined in *Configuration*.

11. In the **CART** field, enter the carrier route.

12. If this is the primary address, mark **Primary address**. If only one address appears on the record, the program automatically marks the checkbox, and you cannot unmark it. Each record can have only one primary address.

13. In the **This is a valid address from [ ] to [ ]** fields, enter the dates for which this is a valid address.

14. If the address is seasonal, mark **This is a seasonal address from [ ] to [ ]** and enter the dates.

15. To add attributes to the address, select the Attributes tab. With address attributes, you can add any additional information you need to maintain about this particular address, such as special mailing instructions.
16. In the **Send [ ] to this address** field, select “All mail”, “Selected mail”, or “No mail”. If you select “All mail” or “No mail”, you cannot add attributes to the address. For more information about entering attributes, see “Adding Attributes” on page 160.

17. To save the address and return to the Addresses tab, click **OK**. The new address appears in the grid.

## Copying and Linking Addresses

To help eliminate data entry errors, you can either copy or copy and link an address to an individual record from another record. When you copy an address, you are merely pasting a separate copy of an address directly to the individual record from another record. Changes to the address on the original record are not made to the copy, or vice versa.

**Note:** To edit an existing linked address, you can open only one record, make your changes, and the program updates the addresses on the linked records.

When you copy and link an address, you are inserting a copy of the address that is still tied to the original address. Changes you make to the address on either record are made automatically to the other record.

- **Copying and linking an address**

**Note:** While this procedure demonstrates copying and linking an applicant address to an individual address, you can use it as a model for copying and linking addresses to other record types.

1. From an open individual record, select the Addresses tab. For information about opening individual records, see “Finding and Opening Individual Records” on page 137.
2. Select the Home address and click **Open** on the action bar. The Address screen appears.

![Address for Ann Kelly](image)

3. To copy the address from the applicant record, click **Copy Address From**. The Open screen appears. Locate the record and click **Open**. For more information about using the Open screen to search for records, see the Program Basics chapter of the *Program Basics Guide*.

The Addresses screen appears.

![Addresses for Cory Alice Kelly](image)

4. In the **Copy?** column, mark the checkbox for each address to copy.

5. To link the addresses, mark **Link these addresses**.

   **Note:** When you link addresses, information is shared. A contact type marked “Not Shared” in the **Share?** column cannot be copied or linked.
6. To copy Cary’s address onto Ann’s record, click **Copy Now**. You return to the Address for Ann Kelly screen, and the copied address information appears. The **Share?** column indicates contact types are linked.

7. To save the information and return to the Addresses tab, click **OK**. The copied address appears in the grid.

**Unlinking Addresses**

You may find it necessary to unlink addresses. When you stop sharing a linked address, you remove links between the records. Changes you make to the address on either record are no longer made automatically to the other record. Each address still has the potential to be shared.

To unlink only a contact type, select “Not Shared” in the **Share?** column.

- **Unlinking an address**
  1. From an open individual record, select the Addresses tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.
2. Select the address to unlink and click **Open**. The Address screen appears.

![Address screen](image)

3. Click **Shared Addresses**. The Shared Addresses screen appears displaying the records the address is linked to.

![Shared Addresses screen](image)

**Note:** When you stop sharing an address, the link is broken between only the individual and the records listed on the Shared Addresses screen. If the records listed have addresses linked to each other, those links are not broken.

4. Click **Stop Sharing This Address**. The individual’s address is no longer linked to the others.
5. To return to the Address screen, click **Close**. The address still appears but is no longer linked.
6. To save the new information and return to the Addresses tab, click **OK**.

**Managing Addressees and Salutations**

**Glossary:** An addressee is a name as it appears on labels, reports, and letters. A salutation is the greeting used in letters and other mailings. For more information about creating addressees and salutations, see the *Configuration Guide for Admissions Office*.
On the Addressees/Salutations tab of an individual record, you can select the primary addressee to appear on labels, envelopes, and letters. Formats for addressees and salutations are defined in Configuration. To maintain consistency in your data entry, we recommend you select predefined addressees and salutations.

An addressee is usually formal, such as Mr. John H. Steinmeyer. A salutation, on the other hand, is how you greet an individual in correspondence. Depending on the type of mailing, you may use a formal or informal salutation. For example, you may use Mr. Steinmeyer on a letter about a school board meeting to or John on a letter about volunteering. The more addressees and salutations you maintain for your individuals, the more flexibility you have in addressing and greeting them.

Because addressees and salutations are shared across Admissions Office, Registrar’s Office, and Student Billing, you should be careful which addressee and salutation you make primary. We recommend that you assign a general primary addressee and salutation that is appropriate for use in all of the programs. We also recommend that you add special types to the Addr/Sal Type table for addressees and salutations you need for specific purposes. For example, you can add an “Applications” Addr/Sal type that you use only on applications. For more information about adding addressee and salutation types, see “Adding an addressee/salutation” on page 150.

Assigning a primary addressee and salutation

1. From an open individual record, select the Addressees/Salutations tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.

Note: In the Primary Addressee and Primary Salutation fields, you can select a predefined entry or add a new one.

2. In the Primary addressee field, select the addressee format to appear on labels, envelopes, and letters. Because addressees and salutations are shared across Admissions Office, Registrar’s Office, and Student Billing, we recommend that you assign a general primary addressee and salutation that is appropriate for use in all of the programs.
3. In the **Primary salutation** field, select the salutation format to appear on mailings.

4. To save the addressee and salutation, click the **Save** button on the toolbar.

   - **Adding an addressee/salutation**

   **Note:** Addressee and salutation formats are defined in *Configuration*. For more information about addressees/salutations, see the *Configuration Guide for Admissions Office*.

   1. From an open individual record, select the Addressees/Salutations tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.

   **Note:** Addressee and salutation formats are defined in *Configuration*. For more information about addressees/salutations, see the *Configuration Guide for Admissions Office*.

   2. In the **Type** column, select a type of addressee or salutation.
3. In the **Addressee/Salutation** column, enter the name as it should appear on labels, letters, reports, and mailings when using this addressee/salutation.

![Image of addressee salutation](image)

4. To save the addressee/salutation, click the **Save** button on the toolbar.

### Adding School Information

By completing the **School Information** grid on an individual record, you can record education information related to an individual, including schools attended and degrees earned. If you convert an individual record, school information converts to the new applicant or faculty/staff record. If you have **Registrar's Office**, you can convert individuals to students. For more information about converting individual records, see “Converting Individual Records” on page 166.

- **Adding school information**

1. From an open individual record, click **School Info**. For information about opening records, see “Finding and Opening Individual Records” on page 137. The School Information screen appears.

![Image of school information](image)

2. In the **School Name** column, enter the school the individual attended. The school must exist as an organization record.

3. In the **Dates Attended** column, enter the dates the individual attended the school.

4. In the **Degree** column, enter the degree the individual received from the school.

5. To return to the individual record, click **OK**.
Adding Demographic Information

Glossary: Demographics are the characteristics of human populations. In Admissions Office, you can follow the demographics of your school and use the information for queries and reports.

With individual records, you can record the demographics of persons affiliated with your school and use this information in queries and reports. By maintaining demographic information, you can create queries and reports that provide both specific and broad information about the individuals associated with your school. For example, some schools report religious affiliation and ethnicity to better understand and gauge diversity.

Adding demographic information

Note: To edit existing demographic information, open the individual record, make your changes, and save the record. For more information, see “Finding and Opening Individual Records” on page 137.

1. On the Bio 1 tab of an open individual record, click Demographics. The Demographic information screen appears. For information about opening records, see “Finding and Opening Individual Records” on page 137.

2. In the Is Hispanic/Latino field, select “Yes” or “No”.

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is Hispanic/Latino</td>
<td>No</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Black (Non-Hispanic Origin)</td>
</tr>
<tr>
<td>Religion</td>
<td>Baptist</td>
</tr>
<tr>
<td>Church affiliation</td>
<td></td>
</tr>
<tr>
<td>Citizenship</td>
<td></td>
</tr>
<tr>
<td>First language</td>
<td>English</td>
</tr>
<tr>
<td>Language spoken at home</td>
<td></td>
</tr>
<tr>
<td>Years in US</td>
<td></td>
</tr>
<tr>
<td>Height</td>
<td></td>
</tr>
<tr>
<td>Weight</td>
<td></td>
</tr>
<tr>
<td>Marital status</td>
<td>Single</td>
</tr>
<tr>
<td>Maiden name</td>
<td></td>
</tr>
</tbody>
</table>
3. In the Ethnicity field, click the binoculars to access a Selected Ethnicities screen. From this screen, select one or multiple ethnicities for the individual.

When integrating, the Ethnicity field in The Raiser’s Edge synchronizes with the first ethnicity value listed in the Ethnicity field in The Education Edge. Note that if the second value listed in the Ethnicity field in The Education Edge matches the Ethnicity field in The Raiser’s Edge, the second value will be deleted.

4. Click OK. You return to the Demographic information screen.

5. In the Religion and Church affiliation fields, select the individual’s religion and church affiliation.

6. In the Citizenship field, select the country of which the individual is a citizen.

7. In the First language and Language spoken at home fields, select the primary language spoken by the individual and the language spoken in his home.

8. In the Years in US field, enter the number of years the individual has lived in the United States.

9. In the Height and Weight fields, enter the individual’s height and weight.

10. In the Marital status and Maiden name fields, select the individual’s marital status and enter a maiden name, if applicable.

11. To save the information and return to the individual record, click OK.

Adding Business Relationship Information Using the Business Button

You can quickly add business relationship information using the Business button on the Bio 1 tab of an individual record. On the Business Relationship screen you can add an address, select the type and reciprocal of the relationship, and specify whether or not you want to share the address. Use the When creating business relationships, [ ] address information business rule to specify whether or not business relationship addresses should be copied and shared by default.

For information about adding business relationships from the Relationships tab, see “Adding Relationships” on page 155.
Adding a business relationship using the Business button

1. On the Bio 1 tab of an open individual record, click Business. The Business Relationship screen appears. For more information about opening records, see “Finding and Opening Individual Records” on page 137.

![Business Relationship screen](image)

2. In the Organization field, click the binoculars to search for the individual’s primary business. The Open screen appears. Locate the record and click Open. You return to the Business Relationship screen.

3. Click Address to access the General, Details, and Attributes tabs as well as the contact grid where you can specify additional information for the relationship. For more information, see “Adding Addresses” on page 142.

4. To copy and link an address click Copy Address From. For more information about copying and linking addresses, see “Copying and linking an address” on page 145.

   When an address is shared, the Stop Address Sharing button is displayed. When you click this button, the Shared Addresses screen appears. From here, select the record with which you want to stop sharing and click Stop Sharing This Address. For more information, see “Unlinking an address” on page 147.

5. The Primary business checkbox shows that this relationship is the primary business. This is disabled and appears for information purposes only.

6. In the Relationship field, select how this organization is related to the individual.

7. In the Reciprocal field, select how the individual is related to this organization.

8. If the individual is a contact for the organization, mark Contact. If this is the primary contact for the organization, mark Primary contact. In the Contact type field, select the type of contact the individual is at the organization.

9. In the Department field, select the department to which the individual belongs at this organization.

10. In the Position field, enter the job or title of the individual at the organization.

11. To print the position on mailings, mark Print?

12. To save the relationship and return to the Bio 1 tab, click Save.

Adding Photos

You can add a photo to an individual record. The photo on an individual record in Admissions Office is shared with the individual record in Registrar’s Office and Student Billing. If you change the photo in one program, the new photo appears in all programs.
Adding a photo

1. On the toolbar of an open individual record, click the **Photo** button. The photo screen appears.

2. To add a photo, click **Change Picture**. Locate the photo and click **Open**. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*. You return to the photo screen and the selected photo appears.

3. To size the photo to fit in the window, mark **Size to fit window**.

4. To save the photo and return to the individual record, click **OK**.

Adding Relationships

Relationships are familial, social, or business associations with other persons or with organizations. By adding relationships, you improve the depth and consistency of your records and improve processes like mailings and assigning actions.
On individual records, you can create personal relationships with applicants, faculty/staff members, or other individuals. If you have Registrar’s Office or Student Billing, you can also create personal relationships with students. For example, an individual can have children who are applicants and a spouse who is an individual or faculty/staff member.

You can also add business relationships on individual records. For example, an individual may be a contact for an organization. By creating a business relationship with the organization, you can associate the individual with actions and recommendations for the organization and add the individual to organization mailings.

You add relationships to an individual record on the Relationships tab. Entries on the Relationships tab affect other areas of the program. For example, if you add a relationship with an applicant, the individual also appears as a relationship on the applicant’s record. You can also add a business relationship using the Business button on the Bio 1 tab.

Relationship information on an individual record in Admissions Office is shared with the individual record in Registrar’s Office and Student Billing. If you make changes to relationships in one program, the changes appear in all programs.

### Adding a personal relationship

1. From an open individual record, select the Relationships tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.
2. In the Show field, select “Personal relationships”.
3. Click Add Relationship on the action bar. The Open screen appears. Locate the record and click Open. For more information about using the Open screen, see the Program Basics chapter of the Program Basics Guide. You return to the Relationships tab, and the selected relationship appears in the grid.
4. In the Relationship column, select how this person is related to the individual.
5. In the Reciprocal Relationship column, select how the individual is related to this person.
6. If the relation is an emergency contact for the individual, mark the checkbox in the Emergency Contact column.

**Note:** If the relation is the individual’s spouse, mark the checkbox in the Spouse column. If you mark the checkbox, the Spouse fields on the Bio 1 tab of both records are completed with the name. Only one relationship can be marked as the spouse.
7. If the relation lives with the individual, mark the checkbox in the Lives with Individual column.
8. In the Notes field, enter any additional information about the relationship.
9. To save the record and return to the Individuals page, click Save and Close.

Adding a business relationship
1. From an open individual record, select the Relationships tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.
2. In the Show field, select “Business relationships”.

3. Click Add Relationship on the action bar. The Open screen appears. Locate the record and click Open. For more information about using the Open screen, see the Program Basics chapter of the Program Basics Guide. You return to the Relationships tab, and the selected relationship appears in the grid.
4. In the Relationship column, select how this organization is related to the individual.
5. In the Reciprocal Relationship column, select how the individual is related to this organization.
6. You can mark one business relationship as the primary business relationship for the individual. When you mark the checkbox in the Primary Business column for a relationship, the program adds the organization’s address to the Addresses tab of the individual record. This address is automatically linked with the address on the organization record.

Note: If you later unmark Primary Business for a relationship, the organization’s address is also removed from the Addresses tab of the individual record, unless you have marked Primary? for the address. In that case, the address remains but is no longer connected to a business relationship.

If you need to change phone numbers or add phone extensions for each person at the organization, open the address record created after marking Primary Business, unshare the phone, and enter the correct number.
7. In the Position column, enter the job or title of the individual at the organization.
8. To print the position on mailings, mark the checkbox in the Print? column.
9. In the Department column, select the department to which the individual belongs at this organization.
10. If the individual is a contact for the organization, mark the checkbox in the Contact column. In the Contact Type column, select the type of contact the individual is at the organization. If this is the primary contact for the organization, mark the checkbox in the Primary Contact column.
11. In the Notes field, enter any additional information about the relationship.
12. To save the record and return to the Individuals page, click Save and Close.

- Viewing the relationship tree
  1. To view a visual representation of an individual’s relationships, select Individual, Relationship Tree.

![Relationship Tree for Mr. Alex Edward Andrews Jr.](image)

2. To open a relation’s record, select the name and click Open.
3. To search for a relation in the tree, click Find.
4. To print the relationship tree, click Print.
5. To expand all of the relations in the tree at once, click Expand All.
6. To close the relationship tree and return to the individual record, click Close.

**Adding Actions**

**Note:** If you have Registrar’s Office or Student Billing, you can assign individuals to complete actions for students.

The Actions tab records any task to be completed for an individual. Actions, for example, can include a phone call to an applicant. If you have the security rights, you can add, edit, and delete actions from this tab.

You can assign an action to another person or yourself, and the program reminds you when the action is due. For example, if a volunteer needs to make phone calls to remind parents of Open House, you can assign the phone call as an action. When the phone call is due, the program reminds her by adding an action reminder to the Home page. You can also create a letter about the action directly from the action record.

When you create a letter using the Letter menu or Letter button on an individual record, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 182.

- Adding an action

**Note:** If another user already has the individual record open, you get a message telling you your changes will not be saved. However, you can add and save an action on a record already in use.
1. From an open individual record, select the Actions tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.


3. In the **Action type** field, select the type of action to be taken, for example, “Phone call” or “Meeting”.

4. In the **Start date**, **End date**, and **Time** fields, enter the dates and times the action is to be taken and finished.

   **Note:** When the action is complete, open the record and mark **Action completed on**. The program automatically enters the current date.

5. In the **Priority** field, select “Low”, “Normal”, or “High”.

6. In the **Location** field, click the binoculars to select a location.

7. In the **Action status** field, select the status of the action, for example, “Pending”.
8. You can print a letter for the person selected in the Select action for field with information about the action.
   • To print a predefined action letter, in the Action letter field, select a letter format and click the Letter button. A processing screen appears as the letter merges and then Word opens displaying the merged letter.
   • To print a quick letter, click the Letter button. Word opens to a document with information merged into the heading. The rest of the document is blank so you can create a custom letter “on the fly”. For more information about quick letters, see “Creating a Quick Letter for an Individual” on page 182.

9. On the Word document toolbar, you can click Save this document to the action to save the letter to the database with the action record. You can later access the letter from the action record.
10. To close the letter and return to the action record, click Return to Action for <Record>.
11. Once the letter is sent, open the record and mark Action letter sent on. The program automatically enters the current date.
12. In the Description box, enter a description of the action.
13. To send a reminder to another user, mark Send reminder to and select a user’s name. In the fields directly below Set reminder to, to determine when to send the reminder, in the fields, enter a number and select “Days”, “Weeks”, or “Months”.
14. In the Assigned to field, select the person assigned to complete the action. The program automatically completes the Assigned to type field from the information on the record you select. The action appears on the record of the person selected in the Assigned to field.
15. To add attributes or notes to the action, click the Attributes/Notes tab. For more information about attributes and notes, see “Managing Attributes, Notes, and Media” on page 160.
16. To save the action and return to the Actions tab, click Save and Close. The new action appears in the grid.

Managing Attributes, Notes, and Media

You can further define an individual record by adding information to the Attributes, Notes, and Media tabs. On the Attributes tab, you can add characteristics to the individual record and group information based on a common theme, which is useful for reporting. On the Notes tab, you can record special information about individuals you may need later. On the Media tab, you can store various media objects, including images, documents, and video or sound files. For example, you can store a scanned teaching certificate or driver’s license.

Adding Attributes

Note: Attributes are defined in Configuration. For information about attributes, see the Configuration Guide for Admissions Office.

The Attributes tab stores additional information about an individual. You can use attributes to define specialized information for records, such as information you want to record, but for which no field is available. You can filter attributes to use in other areas of Admissions Office, such as Query and Reports.

You can define attributes using a variety of data types created in Configuration. If you make an individual attribute required, a message appears reminding you to add it when creating an individual record. For more information about defining attributes, see the Configuration Guide for Admissions Office.
Adding an attribute

**Warning**: You must define attribute types in Configuration before you can add them to an individual record. For more information about attributes, see the Configuration Guide for Admissions Office.

1. From an open individual record, select the Attributes tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.

2. In the **Attribute Type** column, select an attribute type.

3. In the **Description** column, select or enter a description of the attribute.

4. In the **Date** column, enter a date to record when you add the attribute.

5. If this attribute type is required on an individual record, the program automatically marks the checkbox in the **Required** column. You cannot edit this on the Attributes tab.

6. In the **Comments** column, enter any additional comments or more detailed information about the attribute. You can enter free-form text in this column.

7. To save the attribute, click the **Save** button on the toolbar.

Adding Notes

The Notes tab makes it easy to record and maintain information about an individual. For example, you can add a note to record special information about a person or organization, notes from a conversation or phone call, or contact information you may need later.

For each note, you enter a date, description, title, and author. You enter the body of the note in a text box that holds an unlimited amount of free-form text. You can designate note types, such as “Confidential” or “Personal”, and use those designations to run queries, reports, and establish type-based security.

You can set up securities so only certain users can view particular notepad types. This is especially useful when the information is of a sensitive nature and you want to ensure that only you can access the information. For more information about security, see the Security chapter of the Administration Guide for The Education Edge.
Adding a note

Note: To edit an existing note, select the note in the grid and click Open on the action bar.

1. From an open individual record, select the Notes tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.

2. Click New Note on the action bar. The New Note screen appears.
3. In the Type field, select a notepad type.
4. In the Description and Title fields, enter a description and title for the note.
5. In the Author field, select your user name.

Note: You can use the formatting selections on the toolbar to format the note.

6. In the text box, enter notes to associate with the individual record.
7. To save the note and return to the Notes tab, click Save and Close. The new note appears in the grid.

Adding Media

On the Media tab, you can add media objects to an individual record. Media can include photographs, scanned newspaper articles and publications, recommendations, video files, and audio files.

To reduce the size of your database, you can create a link to the media file. Be aware that if the original file is moved or deleted, the link will not work. The linked file must be in a location on your network where other users can access it.

Adding a new media object

Glossary: Media is information about a record such as a photograph or scanned newspaper article. You can create new media objects or retrieve existing media objects to save in the record.
1. From an open individual record, select the Media tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.

![Image of the Media tab in a database application]

**Note:** When you add media, you access applications outside the program to create the media object and save it in your database.

2. On the action bar, click **New Media**. The Insert Object screen appears.

![Image of the Insert Object screen with options for creating a new media object]

3. To create a media file, mark **Create New**.

4. In the **Object Type** box, select a media object. The object types that appear depend on the programs you have installed.

5. To display the media object as an icon, mark **Display As Icon**.

6. Click **OK**. Depending on the kind of media you are creating, either the New Media screen appears, or the program that created the file type opens.
   - If the program for creating the media file type opens, create the media file. After you save and close the file, the New Media screen appears.
• For other file types, you create and add the media in the window at the bottom of the New Media screen.

7. On the New Media screen, in the **Date** field, enter the date you add the media object.
8. In the **Type** field, select a media type.
9. In the **Description** and **Title** fields, enter a description and name for the media object.
10. In the **Author** field, select your user name.

**Note:** If you marked **Display As Icon** on the Insert Object screen, the object icon appears in the bottom of the New Media screen. If you did not mark the checkbox, a blank box appears.

11. To save the media object and return to the Media tab, click **Save and Close**. The new information appears in the grid.
Adding an existing media object

1. From an open individual record, select the Media tab. For information about opening records, see “Finding and Opening Individual Records” on page 137.

2. Click New Media. The Insert Object screen appears.

3. To add a media object using a previously-created file, mark Create from File.

4. Click Browse to search for the file. Once you locate and select the file, click Open. You return to the Insert Object screen, which now displays the file path.

5. You can mark Link so that any change you make to the source file is automatically reflected on the Media tab. If you do not mark Link, the object is embedded.

6. Click OK. The New Media screen appears displaying the selected media object.

7. In the Date field, enter the date you add the media object.

8. In the Type field, select a media type.

Note: When you create media from a file, you browse to saved media objects. If a media object is no longer valid or current, you can access the object and delete it on the Media tab of the individual record.
9. In the **Description** and **Title** fields, enter a description and name for the media object.

10. In the **Author** field, select your user name.

11. To save the media object and return to the Media tab, click **Save and Close**. The media information appears in the grid.

### Viewing History of Changes

The History of Changes tab displays an historic record of key changes made to the individual record. For example, if you change the individual’s address information, the change appears on the History tab.

The information is for informational purposes only. You cannot add or edit data on the History of Changes tab.

- **Viewing an individual’s history of changes**

  1. From an open individual record, select the History of Changes tab. The grid displays **Item Changed**, **Previous Setting**, **New Setting**, **Changed On**, and **Changed By** columns. The History of Changes tab is for informational purposes only.

  ![Image of History of Changes grid](image)

  2. Click **Save and Close** to return to the Individuals page.

### Converting Individual Records

**Note:** To convert an individual record, a user must have edit rights for the record type to which the individual is being converting. For more information about user rights, see the Security chapter of the *Program Basics Guide*.

For increased efficiency, you can convert individual records to applicant or faculty/staff records. If you have **Registrar’s Office**, you can convert individual records to student records. By converting individual records, you save time by avoiding the task of reentering biographical information. You retain relationships linked to the individual, except for organization-based relationships and linked addresses.

When you convert an individual record to an applicant or student record:

- Relationships, attributes, notes, media, and actions convert to the same tabs on the new record. Relationships marked as a spouse do not convert; you must edit the record after conversion.
- School information converts to the education record on the Education tab. Degree information converts to an attribute on the education record. Comments do not convert.

When you convert an individual record to a faculty/staff record:

- Relationships, attributes, notes, media, and actions convert to the same tabs on the new record.
- School information converts to education information on the faculty/staff record Bio 2 tab.
Converting an individual record

You must save the individual record before converting to another record type.

**Note:** While this procedure demonstrates converting an individual record to an applicant record, you can use it as a model for converting individual records to other record types.

1. From an open individual record, select Individuals. From the submenu, select **Convert, to Applicant**. A message appears, asking if you are sure you want to change the record type. For information about opening records, see “Finding and Opening Individual Records” on page 137.

2. To convert the individual record, click **Yes** and the New screen for the record type appears.

3. Review the information on the new record and confirm that it is correct.

4. If the new record type has additional required fields, you must complete these fields before you can save the record.

5. To save the new record and return to the Individuals page, click **Save and Close**.

Creating a Letter from an Individual Record

If you have **Word 2000** or **Word XP** installed on your computer, you can use the **Letter** menu to quickly and easily print a single letter for an individual directly from the individual record, rather than creating it in **Mail**.

**Note:** The **Letter** menu displays letter formats created in **Configuration** and **Records**. For more information about creating letters in **Configuration**, see the **Configuration Guide for Admissions Office**.

On the **Letter** menu, you can select a predefined letter format or select **Create a New Letter Format** to create a new one. Letter formats are associated with an individual export and a simple or conditional **Word** merge file. For more information, see “Creating a Merged Letter for an Individual” on page 168.

You can also create a quick letter for an individual by selecting **Write a letter** from the **Letter** menu. This generates a **Word** document with basic individual information merged automatically into your letter. The rest of the document is blank so you can write a custom letter “on the fly”. For more information, see “Creating a Quick Letter for an Individual” on page 182.
You can select **Modify Letter Menu** to organize and edit saved letter formats. For more information, see “Organizing and Editing Letter Formats” on page 183. When a letter is complete, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 182.

## Creating a Merged Letter for an Individual

Merged letters combine data from an export file with a simple or conditional *Word* merge file. A simple merge uses a single form letter. For example, you can create a form letter for individuals with information about volunteering. The body of the letter is the same for all individuals, but the address section is customized with the recipient’s name, address, and primary salutation.

A conditional merge produces a letter using one of several form letters, based on conditions you define. For example, you can create form letters for individuals who are alumni or previous donors. Using the conditional merge process, you define conditional statements that match individuals with the letter they should receive based on their affiliation with the school. For more information about setting up exports and *Word* merges, see the *Export Guide*.

### Creating a new simple merge letter from an individual record

**Note:** You can also create a new letter format by clicking the down arrow next to the **Letter** button on the toolbar, and selecting **Create a New Letter Format**.

1. From the menu bar of an open individual record, select **Letter, Create a New Letter Format**. The New Individual Letter screen appears.

![New Individual Letter](image.png)

2. In the **Letter description** field, enter a description for the letter. This description appears in the **Letter** menu and Individual Letters in **Configuration**.

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

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**Export Guide**

Blackbaud 101: Navigating the Export Guide and Setting Up External Reports

For more detailed information on how to set up and manage exports, refer to the Blackbaud Export Guide. This guide provides comprehensive instructions on creating and managing export files, as well as integrating them with external systems. It is an essential resource for anyone looking to automate the process of generating reports and sharing data with external partners or systems.
3. In the **Blackbaud Word Merge export** field, you can associate this letter with a *Word* merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

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

![Create a New Export](image)

The **What type of export do you want to create?** box displays “Individual” by default.

**Tip:** You can set a default export format in Options.

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

6. Click **Create Now**. The New Individual Export screen appears.

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

You must have the appropriate security rights to output credit card, bank account, and Social Security numbers. If you have rights, when you add these merge fields, a screen appears where you can select whether the numbers should be masked or unmasked in the letter. If you do not have rights, these numbers are always masked in the letter. For more information, see the Security chapter of the *Administration Guide* for *The Education Edge*.
8. When finished selecting fields, click **Edit word merge file**. *Word* opens automatically to a blank document to use to create your letter.

9. Type the letter in *Word*. To insert a field from *The Education Edge*, select **Insert Education Edge field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

10. When you have finished creating the letter, click **Save and return to EE7 to Merge**. You return to the New Individual Export screen.

11. Click **Save and Close**. The Save Export As screen appears.
12. Enter a name and description of the export and click **Save**. You return to the New Individual Letter screen.

13. To save and close the New Individual Letter screen, click **OK**.

**Note:** Once a new letter format is added to the **Letter** menu, you can access it from any individual record to quickly print the same letter for that individual. Letter formats are also added to Individual Letters in **Configuration**.

14. To print the letter you just created, you must first add it to the **Letter** menu. Select **Letter, Modify Letter Menu**. The Modify Letter Menu screen appears.

15. Click **Search** to access the Search Individual Letters screen.
16. Select the letter to add and click **Open**. The Search Individual Letters screen closes and the new letter appears in the list.

17. Click **Close**. You return to the individual record.

18. From the menu bar select **Letter** and then select the new letter from the menu.
A processing screen appears as the letter generates and then *Word* opens displaying the merged letter.

![Processing screen displaying the merged letter](image)

Note: You can click **Save this document as an action** to save the letter as an action. For more information, see “Saving a Letter as an Action” on page 182.

19. Click **Print**.
20. To close the letter and return to the individual record, click **Return to <Individual>**.

Creating a new conditional merge letter from an individual record


![New Individual Letter screen](image)

2. In the **Letter description** field, enter a description for the letter. This description appears in the **Letter** menu and Individual Letters in **Configuration**.

Note: In the **Export format** field on the Open screen, select “Blackbaud Conditional Word Merge”.
3. In the **Blackbaud Word Merge export** field, you can associate this letter with a Word merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

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

   The **What type of export do you want to create?** box displays “Individual” by default.

   **Tip:** You can set a default export format in Options.

5. In the **Export format** field, select “Blackbaud Conditional Word Merge”.
6. Click **Create Now**. The New Individual Export screen appears.

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

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

11. Based on the field you selected, select the condition and value for the letter. For example, if you are using **Affiliation** as the field, select “equal to” in the **Condition** field and “Donor” in the **this value** field.

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

13. Click **Edit merge document**. **Word** opens automatically to a blank document to use to create your letter. Type the letter in **Word**. To insert a field from **The Education Edge**, select **Insert Education Edge field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

14. When you have finished creating the letter, click **Save and return to EE7 to Merge**. You return to the Conditional Merge Document screen.
15. Click **OK**. You return to the Word Merge Wizard and the new condition appears in the grid.

16. To select more conditions, click **Back** and repeat steps 10-15.

17. When finished selecting conditions, click **Finish**. You return to the New Individual Export screen.

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

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

20. To save and close the New Individual Letter screen, click **OK**.

**Note:** Once a new letter format is added to the **Letter** menu, you can access it from any individual record to quickly print the same letter for that individual. Letter formats are also added to Individual Letters in **Configuration**.
21. To print the letter you just created, you must first add it to the **Letter** menu. Select **Letter, Modify Letter Menu**. The Modify Letter Menu screen appears.

![Modify Letter Menu](image1.png)

22. Click **Search** to access the Search Individual Letters screen.

![Search Applicant Letters](image2.png)

23. Select the letter to add and click **Open**. The Search Individual Letters screen closes and the new letter appears in the list.

![Modify Letter Menu](image3.png)

24. Click **Close**. You return to the individual record.
25. From the menu bar select **Letter** and then select the new letter from the menu.

![Image of the menu bar and letter selection process]

**Note:** You can click **Save this document as an action** to save the letter as an action. For more information, see “Saving a Letter as an Action” on page 182.

A processing screen appears as the letter generates and then **Word** opens displaying the merged letter for the condition that matches the individual.

![Image of the generated letter]

26. Click **Print**.

27. To close the letter and return to the individual record, click **Return to <Individual>**.
Creating a Quick Letter for an Individual

You can create a quick letter for an individual by selecting **Write a letter** from the **Letter** menu. A quick letter does not require a merge or export file. A **Word** document appears with the current date, individual name, and primary address merged automatically into your letter. The rest of the document is blank so you can write a custom letter “on the fly”.

- **Creating a quick letter for an individual**

  **Tip:** You can also click the **Letter** button on the toolbar to write a quick letter.

  1. From the menu bar of an individual record, select **Letter, Write a Letter**.
     
     A processing screen appears as the letter generates and then the **Word** document appears with the current date, individual name, and primary address in the header.

     ![Word document example](image)

     Thursday, May 05, 2005
     
     Hunter Adams
     1330 Orangburg Road
     Charleston, SC 29065
     
     Dear Hunter Adams,

     ________________________________
     (Section break (Continuous))

     2. Write the letter’s text and then print.

     3. To save the letter as an action, click **Save this document as an action**. For more information, see “Saving a Letter as an Action” on page 182.

     4. To close the letter and return to the individual record, click **Return to <Individual>**.

Saving a Letter as an Action

**Note:** You can also create action letters from the individual’s Action tab. For more information, see “Adding Actions” on page 158.

When a letter is complete, you can save it as an action. This creates an action record for the individual with the current date as the **Start date** and **Action completed on** date. The description of the action is “Letter to <Individual>”. To view the action, select the Actions tab of the individual record, and open the action.

In business rules, you must set the default action type for each record type. You cannot save a letter as an action until a default action type is selected. For more information about business rules, see the **Configuration Guide for Admissions Office**.

- **Saving a letter as an action**

  1. From an open letter in **Word**, click **Save this document as an action** on the toolbar. A message appears, letting you know the action was added.

  2. Click **OK**.

  3. To close the letter and return to the individual record, click **Return to <Individual>**.
Organizing and Editing Letter Formats

On the Modify Letter Menu screen, you can select the letter formats that appear in the Letter menu and organize how they appear. You can also open and edit existing letter formats.

Organizing the Letter menu

1. From the menu bar of an individual record, select Letter, Modify Letter Menu. The Modify Letter Menu screen appears.

   ![Modify Letter Menu](image)

   The Show these letters in the letter menu box lists the individual letters selected to appear in the Letter menu.

   **Note:** Once a new letter format is added to the Letter menu, you can access it from any individual record to quickly print the same letter for that individual. Letter formats are also added to Individual Letters in Configuration.

   - To add a letter to the menu, click Search to access the Search Individual Letters screen. Select the letter to add and click Open. The Search Individual Letters screen closes and the new letter appears in the list.
   - To create a new merged letter, click New. The New Individual Letter screen appears. For more information about creating merged letters, see “Creating a Merged Letter for an Individual” on page 168.
   - To open a letter format, select the letter and click Open. The Individual Letter screen appears. You can click Edit Export to view or modify the letter’s merge and export files. For more information about editing a saved letter format, see “Editing a saved letter format” on page 184.
   - To remove a letter format from the list, select the letter and click Remove. The letter is removed from the list and will no longer appear in the Letter menu.
   - To add a horizontal line between letters in the Letter menu, select a letter and click Separator. A line appears below the selected letter.
   - To change the order of letters in the Letter menu, select a letter and click Up or Down.

2. Click Close to return to the individual record.
Editing a saved letter format

1. From the menu bar of an individual record, select Letter, Modify Letter Menu. The Modify Letter Menu screen appears.

2. Select the letter to edit, and click Open. The Individual Letter screen appears.
3. Click **Edit Export**. The export screen appears. On this screen, you can add additional merge fields to use in your letter.

4. To edit the merge document, on the toolbar, click **Edit word merge file**. **Word** opens displaying the merge document.

5. You can delete, add, or replace any of the letter’s text.

6. To remove a merge field, select the field in the document and click **DELETE** on your keyboard.

7. Click **Insert Education Edge field** to select a replacement merge field.

8. On the toolbar, click **Save and return to EE7 to Merge**. You return to the export screen.

9. On the toolbar, click **Save and Close**. You return to the Individual Letter screen.

10. Click **OK**. You return to the Modify Letter Menu screen.

11. Click **Close**. You return to the individual record.
Organizations

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In Admissions Office, an organization is the name of another school with which your school has contact, such as a feeder school, college, university, or an organization that employs persons affiliated with your school. Once you add organization records to the program, you can use them on other records when organization information is required. For example, you can set up records for feeder schools, colleges, universities, and organizations that employ persons affiliated with your school. Once you add records to the program, you can use them on other records when organization information is required.

With organization records, you can create relationships with other records in the program. By creating relationships, you link organizations to faculty/staff members, individuals, and other organizations. For example, to record the educational background of your school’s faculty/staff members, you can create organization records for the various colleges and universities they attended, and then link each faculty/staff member to his respective institution.

If you have Registrar’s Office and Student Billing, these programs work with Admissions Office so that organization information is shared in the same database for the admissions office, registrar’s office, and billing office. An organization record created or deleted in Admissions Office is also created or deleted in Registrar’s Office and Student Billing. Some organization information, such as contact, address, and relationship information is shared across the programs so if you make changes to the record in one program, the changes appear in all programs. For a complete list of shared features, see the Integrating Student Billing with The Education Edge guide.

Accessing Organization Records

Glossary: An organization is another school with which your school has contact, such as a feeder school, college, university, or an organization that employs persons affiliated with your school. Once you add organization records to the program, you can use them on other records when organization information is required.
Because records are such an important part of Admissions Office, we have placed all record types on the Records page so you can quickly access them. Think of Records as a filing cabinet. You open a filing cabinet to pull out a record, or file. When you open Records, you can directly access several record types, including organization records. To access organization records, click Records on the navigation bar, then click Organizations. The Organizations page appears.

Consider the Organizations page the starting point for organization records. From this page, you can add a new organization or open an existing record. You can edit record options by clicking Edit options for Organizations. For more information about options, see the Options chapter in the Program Basics Guide.

To save time when searching for a specific record, you can use the Search for an Organization by Name field. The Organizations page lists recently accessed records. You can open a record in the list by clicking the organization’s name.

Finding and Opening Organization Records

When you click Open an Organization on the Organizations page, the Open screen for organization records appears. The Open screen has a number of filters you can use to narrow your search and quickly locate the record you want to open. The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results.

You can use wildcard characters if you are not sure how a word is spelled — use a question mark to replace a single character and an asterisk to replace a series of characters. For more information about wildcards, see the Query Guide.

Opening an organization record

**Note:** You can access the Open screen by selecting File, Open from Records.

2. Click Organizations. The Organizations page appears.
3. Click **Open an Organization**. The Open screen appears.

![Open Screen Screenshot]

**Note:** For more information about filtering criteria on the Open screen, see the Program Basics chapter of the Program Basics Guide.

4. In the **Find Organizations that meet these criteria** frame, enter criteria you are using to search for the record.

5. After you enter search criteria, click **Find Now**. The program searches the database and displays all records meeting your criteria.

6. In the grid, select the organization to open.
7. Click **Open**. The organization record appears.

8. To save the record and return to the Organizations page, click **Save and Close**.

## Adding Organization Records

On the Organization tab, you maintain information about the organization including name, classification, and contact information. If the organization is a school or college, you can record accreditation and other academic information, including the marking system and GPA scale.

If you enter common values repeatedly for multiple organization records, you can create a default set with common values to save time during data entry. The values are defaults only and you can change default information in the fields at any time. You can load default sets on an organization record by selecting **Organization, Load Defaults from** on the menu bar. For more information about default sets, see the Program Basics chapter of the *Program Basics Guide*.

To prevent entering duplicate organization records, you can specify duplicate search criteria in *Configuration*. We strongly recommend that you set the business rule to check for duplicates automatically. To search for a duplicate record from an existing record, access the menu bar and select **Organization, Duplicate Search**. For more information about business rules, see the *Configuration Guide for Admissions Office*.

- Adding an organization record

**Note:** To edit an existing organization record, open the record, make your changes, and save the record. For more information, see “Finding and Opening Organization Records” on page 189.
On the Organizations page, click **Add a New Organization**. The New Organization screen appears.

1. In the **Name** field, enter the name of the organization.
2. In the **Classification** field, select the organization’s classification. You can select “School”, “College”, or “Other”.
   - Select “School” for feeder schools or other schools that applicants have previously attended.
   - Select “College” for feeder schools or colleges and universities attended by faculty/staff members and individuals.
   - Select “Other” for other organizations affiliated with your school, including the employers of parents and other individuals. If you select “Other”, fields on the Organization tab regarding accreditation and grading information are hidden.
3. In the **Type** field, select the type of organization. For example, if the classification is “College”, the **Type** field could be configured to include “Private University”, “Public University”, or “Two-Year Community College”. The options available in this field are defined in **Configuration**.
4. In the **Record ID** field, enter the organization’s ID. You can set a business rule to automatically generate organization IDs. If this business rule is marked, the ID is automatically generated when you save the record. Organization IDs must be unique. For more information about business rules, see the **Configuration Guide for Admissions Office**.
5. In the **Accreditation** field, enter the organization’s accreditation.
6. In the **Source** field, enter how the organization became affiliated with your school.
7. In the **Location** field, enter the area the organization is located.
8. If the organization is a school or college, in the **Marking system** field, enter the marking system used by the organization.
9. If the organization is a school or college, in the **GPA scale** field, select the type of GPA scale used by the organization.

**Note:** If you have only **Admissions Office**, some tabs and selections shown here may not appear on the organization record.
11. In the Identification number grid, enter the ID source and the corresponding ID number. For example, you can record a school’s financial aid identification number.

**Note:** The address entered on the Organization tab becomes the primary address by default. You can change the primary address designation on the Addresses tab.

12. In the Address box and in the Country, City, State, and ZIP fields, enter the organization’s address. To enter additional details about this address, or to copy and link addresses, click the Address button. For more information about addresses, see “Managing Addresses” on page 193.

13. In the contact grid, you can enter multiple contacts for the organization. For example, you can add home, fax, and cellular phone numbers. In the Contact Type column, select the contact type. In the Contact Number column, enter the corresponding information, including phone numbers and email addresses.

The Link column indicates whether the information is linked to another record in the database. If you copied and linked the organization’s address, you can select “Shared” or “Not Shared”. If the information is not linked to another record, the column defaults to “Not Shared” and is for informational purposes only. For more information about linking addresses and contact information, see “Copying and linking an address” on page 196.

14. To save the record and return to the Organizations page, click Save and Close.

## Managing Addresses

**Tip:** You can print a label or envelope directly from an organization record using the button on the toolbar. For more information about formatting labels or envelopes, see the Mail Guide.

On the Addresses tab, you can add and maintain multiple addresses for organization records. Each record has one primary address marked on the Addresses tab. The primary address appears on the Organization tab. You can maintain additional addresses on the Addresses tab.

You can add an address on the Organization or Addresses tab. When you add an address on the Organization tab, it automatically becomes the primary address for the record. When you add an address on the Addresses tab, you can designate the address as primary or leave it as an alternate or secondary address.

Addresses on an organization record in Admissions Office are shared with organization records in Registrar’s Office and Student Billing. If you make changes to the record in one program, the changes appear in all programs.

### Adding an address

**Note:** To edit an existing address, select the address in the grid and click Open on the action bar. When you make your changes, the program updates the addresses on the open record and on the linked records.

1. From an open organization record, select the Addresses tab. For information about opening records, see “Finding and Opening Organization Records” on page 189.
2. On the action bar, click **New Address**. The Address screen appears.

![Address Screen](image)

**Note:** You can also access the Address screen by clicking the **Address** button on the Organization tab.

3. In the **Address type** field, select the type of address. Address types are defined in **Configuration**.
4. In the **Country** field, select the country of the address.
5. In the **Address** box and the **City, State, and ZIP** fields, enter the address.
6. In the contact grid, in the **Contact Type** column, select a contact method. In the **Contact Number** column, enter a phone number or Web or email address.
7. The **Link** column indicates whether the information is linked to another record in the database. If you copy and link the organization's address, you can select “Shared” or “Not Shared”. If the information is not linked to another record, the column defaults to “Not Shared” and is for informational purposes only. For more information about linking addresses and contact information, see “Copying and Linking Addresses” on page 196.
8. If you do not want the address block that prints linked with the individual address fields, unmark **Synchronize with individual address fields**. If you unmark this checkbox, you must manually update the printed address in the **Address as it will be printed** box.

**Note:** You can use the address types to specify how an address is used. For example, you can create a “Correspondence” address type for addresses that are used only for correspondence.
9. Select the Details tab.

![Image of Address for Bishop John High School dialog box with Details tab selected]

10. In the **Description** field, enter a description for the address.

11. In the **County** and **Region** fields, select address information. Selections for these fields are defined in *Configuration*.

12. In the **CART** field, enter the carrier route.

13. If this is the primary address, mark **Primary address**. If only one address appears on the record, the program automatically marks the checkbox, and you cannot unmark it. Each record can have only one primary address.

14. In the **This is a valid address from [ ] to [ ]** fields, enter the dates for which this is a valid address.

15. If the address is seasonal, mark **This is a seasonal address from [ ] to [ ]** and enter the dates.

16. To add attributes to the address, select the Attributes tab. With address attributes, you can add any additional information you need to maintain about this particular address, such as special mailing instructions.
17. In the **Send [ ] to this address** field, select “All mail”, “Selected mail”, or “No mail”. If you select “All mail” or “No mail”, you cannot add attributes to the address. For more information about entering attributes, see “Adding Attributes” on page 204.

18. To save the address and return to the Addresses tab, click **OK**. The new address appears in the grid.

### Copying and Linking Addresses

To help eliminate data entry errors, you can either copy or copy and link an address to an organization record from another record. When you copy an address, you are merely pasting a separate copy of the address directly from another record onto the organization record. Changes to the address on the organization record are not made to the copy, or vice versa.

**Note:** To edit an existing linked address, you can open only one record, make your changes, and the program updates the addresses on the linked records.

When you copy and link an address, you are inserting a copy of the address that is still tied to the original address. Changes you make to the address on either record are made automatically to the other record.

- **Copying and linking an address**

  **Note:** While this procedure demonstrates copying and linking an individual address to an organization, you can use it as a model for copying and linking addresses to other record types.

1. From an organization record, select the Addresses tab. For more information about opening records, see “Finding and Opening Organization Records” on page 189.
2. Select the organization address and click Open on the action bar. The Address screen appears.

![Address for Bishop John High School](image)

Note: When you link addresses, information is shared. A contact type marked “Not Shared” in the Link? column cannot be copied or linked.

3. To copy the address from the record, click Copy Address From. The Open screen appears. Locate the record and click Open. For more information about using the Open screen to search for records, see the Program Basics chapter of the Program Basics Guide.

The Addresses screen appears.

![Addresses for Mrs. Alice Haynes](image)

4. In the Copy? column, mark the checkbox for each address to copy.

5. To link the addresses, mark Link these addresses.
6. To copy the address onto Bishop John High School’s record, click **Copy Now**. You return to the Address screen, and the copied address information appears. The **Link?** column indicates contact types are linked.

7. To save the information and return to the Addresses tab, click **OK**.

### Unlinking Addresses

You may find it necessary to unlink addresses. When you stop sharing a linked address, you remove links between the records. Changes you make to the address on either record are no longer made automatically to the other record. Each address still has the potential to be shared.

To unlink only a contact type, select “Not Shared” in the **Linked?** column.

- **Unlinking an address**
  1. From an open organization record, select the Addresses tab. For information about opening records, see “Finding and Opening Organization Records” on page 189.
2. Select the address to unlink and click Open. The Address screen appears.

3. Click Shared Addresses. The Shared Addresses screen appears displaying the records the address is linked to.

Note: When you stop sharing an address, the link is broken between only the organization and the records listed on the Shared Addresses screen. If the records listed have addresses linked to each other, those links are not broken.

4. Click Stop Sharing This Address. The organization’s address is no longer linked to the others.
5. To return to the Address screen, click Close. The address still appears but is no longer linked.
6. To save the new information and return to the Addresses tab, click OK.

Adding Relationships

Relationships are familial, social, or business associations with other persons or with organizations. By adding relationships, you improve the depth and consistency of your records and improve processes like mailings and assigning actions.

On organization records, you can create relationships with individuals, faculty/staff members, applicants, or other organizations. If you have Registrar's Office, you can also create relationships with students.
You add relationships to an organization record on the Relationships tab. Entries on the Relationships tab affect other areas of the program. For example, if you add a relationship with an individual, the organization also appears as a relationship on the individual’s record.

Relationship information on an organization record in **Admissions Office** is shared with the organization record in **Student Billing** and **Registrar’s Office**. If you make changes to relationships in one program, the changes appear in all programs.

- **Adding a relationship**

  1. From an open organization record, select the Relationships tab. For information about opening records, see “Finding and Opening Organization Records” on page 189.

  2. Click **Add Relationship** on the action bar. The Open screen appears. Locate the record and click **Open**. For more information about using the Open screen, see the Program Basics chapter of the **Program Basics Guide**. You return to the Relationships tab, and the selected relationship appears in the grid.

  3. In the **Relationship** column, select how this person is related to the organization.

  4. In the **Reciprocal Relationship** column, select how the organization is related to this person.

  5. If the organization is the primary business for the organization, mark the checkbox in the **Primary Business** column.

  6. In the **Position** column, enter the job or title of the person at the organization.

  7. To print the position on mailings, mark the checkbox in the **Print?** column.

  8. In the **Department** column, select the department to which the person belongs at this organization.

  9. If the person is a contact for the organization, mark the checkbox in the **Contact** column. In the **Contact Type** column, select the type of contact the person is at the organization. If this is the primary contact for the organization, mark the checkbox in the **Primary Contact** column.

  10. In the **Notes** field, enter any additional information about the relationship.

  11. To save the record and return to the Organizations page, click **Save and Close**.
Viewing the relationship tree

1. To view a visual representation of an organization’s relationships, select **Organization, Relationship Tree**.

2. To open a relation’s record, select the name and click **Open**.

3. To search for a relation in the tree, click **Find**.

4. To print the relationship tree, click **Print**.

5. To expand all of the relations in the tree at once, click **Expand All**.

6. To close the relationship tree and return to the organization record, click **Close**.

Adding Actions

The Actions tab records any task to be completed for an organization and can include the organization’s contact. Actions, for example, can include verifying recommendations and soliciting donations for a school event. If you have the security rights, you can add, edit, and delete actions from this tab.

You can assign an action to another person or yourself, and the program reminds you when the action is due. For example, if the admissions counselor needs to call an organization to check on transcripts, you can assign the phone call as an action. When the phone call is due, the program reminds the counselor by adding an action reminder to the Home page. You can also create a letter about the action directly from the action record.

When you create a letter using the **Letter** menu or **Letter** button on an organization record, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 222.

Adding an action

**Note:** If another user already has the organization record open, you will get a message telling you your changes will not be saved. However, you can add and save an action on a record already in use.
1. From an open organization record, select the Actions tab. For information about opening records, see “Finding and Opening Organization Records” on page 189.

![Actions Tab Screen](image)


![New Action Screen](image)

**Note:** To expedite an action, you can designate a contact for the organization on the action record. This is helpful for the person completing the action. It saves time that would otherwise be spent finding the right person to talk with at the organization.

3. In the **Contact** field, select a contact for this action. You can select only contacts associated with the organization.

4. In the **Action type** field, select the type of action to be taken, for example, “Phone call” or “Meeting”.
5. In the **Start date**, **End date**, and **Time** fields, enter the dates and times the action is to be taken and finished.

6. In the **Priority** field, select “Low”, “Normal”, or “High”.

7. In the **Location** field, click the binoculars to select a location.

   When the action is complete, open the record and mark **Action completed on**. The program automatically enters the current date.

8. In the **Action status** field, select the status of the action, for example, “Pending”.

**Note:** You create action letters in **Configuration**. For more information, see the **Configuration Guide for Admissions Office**.

9. You can print a letter for the person selected in the **Select action for** field with information about the action.

   • To print a predefined action letter, in the **Action letter** field, select a letter format and click the **Letter** button. A processing screen appears as the letter merges and then **Word** opens displaying the merged letter.

   • To print a quick letter, click the **Letter** button. **Word** opens to a document with information merged into the heading. The rest of the document is blank so you can create a custom letter “on the fly”. For more information about quick letters, see “Creating a Quick Letter for an Organization” on page 222.

**Note:** If you save a letter to an action, a **Word** icon appears in the status bar of the action record.

10. On the **Word** document toolbar, you can click **Save this document to the action** to save the letter to the database with the action record. You can later access the letter from the action record.

11. To close the letter and return to the action record, click **Return to Action for <Record>**.

12. Once the letter is sent, open the record and mark **Action letter sent on**. The program automatically enters the current date.

13. In the **Description** box, enter a description of the action.

14. To send a reminder to another user, mark **Send reminder to** and select a user’s name. In the fields directly below **Set reminder to**, to determine when to send the reminder, in the fields, enter a number and select “Days”, “Weeks”, or “Months”.

15. In the **Assigned to** field, select the person assigned to complete the action. The program automatically completes the **Assigned to type** field from the information on the record you select. The action appears on the record of the person selected in the **Assigned to** field.

16. To add attributes or notes to the action, click the Attributes/Notes tab. For more information about attributes and notes, see “Managing Attributes and Notes” on page 203.

17. To save the action and return to the Actions tab, click **Save and Close**. The new action appears in the grid.

### Managing Attributes and Notes

You can further define an organization record by adding information to the Attributes and Notes tabs. On the Attributes tab, you can add characteristics to the record and group information based on a common theme, which is useful for reporting. On the Notes tab, you can record special information about staff members you may need later.
Adding Attributes

Note: Attributes are defined in Configuration. For information about attributes, see the Configuration Guide for Admissions Office.

The Attributes tab stores additional information about an organization. You can use attributes to define specialized information for records, such as information you want to record, but for which no field is available. You can filter attributes to use in other areas of Admissions Office, such as Query and Reports.

You can define attributes using a variety of data types created in Configuration. If you make an organization attribute required, a message appears reminding you to add it when creating an organization record. For more information about defining attributes, see the Configuration Guide for Admissions Office.

Adding an attribute

1. From an open organization record, select the Attributes tab. For information about opening records, see “Finding and Opening Organization Records” on page 189.

2. In the Attribute Type column, select an attribute type.

3. In the Description column, select or enter a description of the attribute.

4. In the Date column, enter a date to record when you add the attribute.

5. If this attribute type is required on an organization record, the program automatically marks the checkbox in the Required column. You cannot edit this on the Attributes tab.
6. In the **Comments** column, enter any additional comments or more detailed information about the attribute. You can enter free-form text in this column.

![Organizations screenshot]

7. To save the attribute, click the **Save** button on the toolbar.

### Adding Notes

The Notes tab makes it easy to record and maintain information about an organization. For example, you can add a note to record special information about, notes from a conversation or phone call, or additional contact information you may need later.

For each note, you enter a date, description, title, and author. You enter the body of the note in a text box that holds an unlimited amount of free-form text. You can designate note types, such as “Confidential” or “Personal”, and use those designations to run queries, reports, and establish type-based security.

You can set up securities so only certain users can view particular notepad types. This is especially useful when the information is of a sensitive nature and you want to ensure that only you can access the information. For more information about security, see the Security chapter of the *Administration Guide* for *The Education Edge*.

- **Adding a note**

  **Note:** To edit an existing note, select the note in the grid and click **Open** on the action bar.
1. From an open organization record, select the Notes tab. For information about opening records, see “Finding and Opening Organization Records” on page 189.

![Image of the Notes tab in a software application]

2. On the action bar, click **New Note**. The New Note screen appears.

![Image of the New Note screen]

3. In the **Type** field, select a notepad type.
4. In the **Description** and **Title** fields, enter a description and title for the note.
5. In the **Author** field, select your user name.

**Note:** You can use the formatting selections on the toolbar to format the note.
6. In the text box, enter notes to associate with the organization record.
7. To save the note and return to the Notes tab, click Save and Close. The new note appears in the grid.

Viewing History of Changes

The History of Changes tab displays an historic record of key changes made to the organization record. For example, if you change the organization’s address information, the change appears on the History of Changes tab.

The information is for informational purposes only. You cannot add or edit data on the History of Changes tab.

Viewing an organization’s history of changes

1. From an open organization record, select the History of Changes tab. The grid displays Item Changed, Previous Setting, New Setting, Changed On, and Changed By columns. The History of Changes tab is for informational purposes only.

2. Click Save and Close to return to the Organizations page.

Creating a Letter from an Organization Record

If you have Word 2000 or Word XP installed on your computer, you can use the Letter menu to quickly and easily print a single letter for an organization directly from the organization record, rather than creating it in Mail.

Note: The Letter menu displays letter formats created in Configuration and Records. For more information about creating letters in Configuration, see the Configuration Guide for Admissions Office.

On the Letter menu, you can select a predefined letter format or select Create a New Letter Format to create a new one. Letter formats are associated with an organization export and a simple or conditional Word merge file. For more information, see “Creating a Merged Letter for an Organization” on page 208.

You can also create a quick letter for an organization by selecting Write a letter from the Letter menu. This generates a Word document with basic organization information merged automatically into your letter. The rest of the document is blank so you can write a custom letter “on the fly”. For more information, see “Creating a Quick Letter for an Organization” on page 222.

You can select Modify Letter Menu to organize and edit saved letter formats. For more information, see “Organizing and Editing Letter Formats” on page 223.

When a letter is complete, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 222.
Creating a Merged Letter for an Organization

Merged letters combine data from an export file with a simple or conditional Word merge file. A simple merge uses a single form letter. For example, you can create a form letter for nonprofits letting them know about an upcoming community service fair at your school. The body of the letter is the same for all organizations, but the address section is customized with the organization’s name, and address.

A conditional merge produces a letter using one of several form letters, based on conditions you define. For example, you can create form letters for feeder schools about upcoming open houses for your middle and upper schools. Using the conditional merge process, you define conditional statements that match the feeder school with the letter they should receive based on their type of school. For more information about setting up exports and Word merges, see the Export Guide

Creating a new simple merge letter from an organization record

Note: You can also create a new letter format by clicking the down arrow next to the Letter button on the toolbar, and selecting Create a New Letter Format.


2. In the Letter description field, enter a description for the letter. This description appears in the Letter menu and Organization Letters in Configuration.

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

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

![Open screen](image)

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

![Create a New Export](image)

The **What type of export do you want to create?** box displays “Organization” by default.

**Tip:** You can set a default export format in Options.

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

![Export format](image)
6. Click **Create Now**. The New Organization Export screen appears.

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

You must have the appropriate security rights to output credit card, bank account, and Social Security numbers. If you have rights, when you add these merge fields, a screen appears where you can select whether the numbers should be masked or unmasked in the letter. If you do not have rights, these numbers are always masked in the letter. For more information, see the Security chapter of the *Administration Guide* for *The Education Edge*. 
8. When finished selecting fields, click **Edit word merge file**. Word opens automatically to a blank document to use to create your letter.

9. Type the letter in **Word**. To insert a field from *The Education Edge*, select **Insert Education Edge field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

10. When you have finished creating the letter, click **Save and return to EE7 to Merge**. You return to the New Organization Export screen.

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

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

13. To save and close the New Organization Letter screen, click **OK**.
14. To print the letter you just created, you must first add it to the Letter menu. Select Letter, Modify Letter Menu. The Modify Letter Menu screen appears.

15. Click Search to access the Search Organization Letters screen.
16. Select the letter to add and click **Open**. The Search Organization Letters screen closes and the new letter appears in the list.

17. Click **Close**. You return to the organization record.

18. From the menu bar select **Letter** and then select the new letter from the menu.
A processing screen appears as the letter generates and then Word opens displaying the merged letter.

Note: You can click Save this document as an action to save the letter as an action. For more information, see “Saving a Letter as an Action” on page 222.

19. Click Print.
20. To close the letter and return to the organization record, click Return to <Organization>.

Creating a new conditional merge letter from an organization record

2. In the Letter description field, enter a description for the letter. This description appears in the Letter menu and Organization Letters in Configuration.

Note: In the Export format field on the Open screen, select “Blackbaud Conditional Word Merge”.
3. In the **Blackbaud Word Merge export** field, you can associate this letter with a *Word* merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

![Open screen](image)

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

![New Individual Export](image)

The **What type of export do you want to create?** box displays “Organization” by default.

**Tip:** You can set a default export format in Options.

5. In the **Export format** field, select “Blackbaud Conditional Word Merge”.
6. Click **Create Now**. The New Organization Export screen appears.

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

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

11. Based on the field you selected, select the condition and value for the letter. For example, if you are using Type as the field, select “equal to” in the **Condition** field and “Lower School” in the **this value** field.

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

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

14. Type the letter in **Word**. To insert a field from **The Education Edge** select **Insert Education Edge field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

15. When you have finished creating the letter, click **Save and return to EE7 to Merge**. You return to the Conditional Merge Document screen.
16. Click **OK**. You return to the Word Merge Wizard and the new condition appears in the grid.

17. To select more conditions, click **Back** and repeat steps 10-16.

18. When finished selecting conditions, click **Finish**. You return to the New Organization Export screen.

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

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

21. To save and close the New Organization Letter screen, click **OK**.

**Note:** Once a new letter format is added to the Letter menu, you can access it from any organization record to quickly print the same letter for that organization. Letter formats are also added to Organization Letters in **Configuration**.
22. To print the letter you just created, you must first add it to the **Letter** menu. Select **Letter, Modify Letter Menu**. The Modify Letter Menu screen appears.

![](image1.png)

23. Click **Search** to access the Search Organization Letters screen.

![](image2.png)

24. Select the letter to add and click **Open**. The Search Organization Letters screen closes and the new letter appears in the list.

![](image3.png)

25. Click **Close**. You return to the organization record.
26. From the menu bar select **Letter** and then select the new letter from the menu.

![Image of the software interface showing a letter being written and options available on the menu bar.]

**Note:** You can click **Save this document as an action** to save the letter as an action. For more information, see “Saving a Letter as an Action” on page 222.

A processing screen appears as the letter generates and then **Word** opens displaying the merged letter for the condition that matches the organization.

27. Click **Print**.

28. To close the letter and return to the organization record, click **Return to <Organization>**.
Creating a Quick Letter for an Organization

You can create a quick letter for an organization by selecting **Write a letter** from the **Letter** menu. A quick letter does not require a merge or export file. A **Word** document appears with the current date, organization name, and primary address merged automatically into your letter. The rest of the document is blank so you can write a custom letter “on the fly”.

- **Creating a quick letter for an organization**

  **Tip:** You can also click the **Letter** button on the toolbar to write a quick letter.

  1. From the menu bar of an organization record, select **Letter**, **Write a Letter**.

     A processing screen appears as the letter generates and then the **Word** document appears with the current date, organization name, and primary address in the header.

2. Write the letter’s text and then print.

3. To save the letter as an action, click **Save this document as an action**. For more information, see “Saving a Letter as an Action” on page 222.

4. To close the letter and return to the organization record, click **Return to <Organization>**.

Saving a Letter as an Action

**Note:** You can also create action letters from the organization’s Action tab. For more information, see “Adding Actions” on page 201.

When a letter is complete, you can save it as an action. This creates an action record for the organization with the current date as the **Start date** and **Action completed on** date. The description of the action is “Letter to <Organization>”. To view the action, select the Actions tab of the organization record, and open the action.

In business rules, you must set the default action type for each record type. You cannot save a letter as an action until a default action type is selected. For more information about business rules, see the **Configuration Guide for Admissions Office**.

- **Saving a letter as an action**

  1. From an open letter in **Word**, click **Save this document as an action** on the toolbar. A message appears, letting you know the action was added.

  2. Click **OK**.

  3. To close the letter and return to the organization record, click **Return to <Organization>**.
Organizing and Editing Letter Formats

On the Modify Letter Menu screen, you can select the letter formats that appear in the Letter menu and organize how they appear. You can also open and edit existing letter formats.

Organizing the Letter menu

1. From the menu bar of an organization record, select Letter, Modify Letter Menu. The Modify Letter Menu screen appears.

The Show these letters in the letter menu box lists the organization letters selected to appear in the Letter menu.

Note: Once a new letter format is added to the Letter menu, you can access it from any organization record to quickly print the same letter for that organization. Letter formats are also added to Organization Letters in Configuration.

- To add a letter to the menu, click Search to access the Search Organization Letters screen. Select the letter to add and click Open. The Search Organization Letters screen closes and the new letter appears in the list.
- To create a new merged letter, click New. The New Organization Letter screen appears. For more information about creating merged letters, see “Creating a Merged Letter for an Organization” on page 208.
- To open a letter format, select the letter and click Open. The Organization Letter screen appears. You can click Edit Export to view or modify the letter’s merge and export files. For more information about editing a saved letter format, see “Editing a saved letter format” on page 224.
- To remove a letter format from the list, select the letter and click Remove. The letter is removed from the list and will no longer appear in the Letter menu.
- To add a horizontal line between letters in the Letter menu, select a letter and click Separator. A line appears below the selected letter.
- To change the order of letters in the Letter menu, select a letter and click Up or Down.

2. Click Close to return to the organization record.
Editing a saved letter format

1. From the menu bar of an organization record, select **Letter, Modify Letter Menu**. The Modify Letter Menu screen appears.

2. Select the letter to edit, and click **Open**. The Organization Letter screen appears.
3. Click **Edit Export**. The export screen appears. On this screen, you can add additional merge fields to use in your letter.

4. To edit the merge document, on the toolbar, click **Edit word merge file**. *Word* opens displaying the merge document.

5. You can delete, add, or replace any of the letter’s text.

6. To remove a merge field, select the field in the document and click **DELETE** on your keyboard.

7. Click **Insert Education Edge field** to select a replacement merge field.

8. On the toolbar, click **Save and return to EE7 to Merge**. You return to the export screen.


10. Click **OK**. You return to the Modify Letter Menu screen.

11. Click **Close**. You return to the organization record.
Rooms

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In *Admissions Office*, a room is a location in your school used for classes, offices, and events. For example, a room can be designated a classroom, lab, cafeteria, or gym. Using room records helps streamline the scheduling process and event planning. Once you add a room record to the program, you can select it when scheduling rooms to use for events, including applicant interviews, open houses, and other admissions-related events.

You can use room records to further define an action assigned to a faculty/staff member. When adding an action to the faculty/staff record, you select a room in the **Location** field. For example, if you assign an admissions counselor to interview an applicant, you can designate the room in which the meeting takes place.

### Accessing Room Records

**Glossary:** A room is a location in your school used for classes, offices, and events. For example, a room can be designated a classroom, lab, cafeteria, or gym. Using room records helps streamline the scheduling process and event planning.

Because records are such an important part of *Admissions Office*, we have placed all record types on the Records page so you can quickly access them. Think of *Records* as a filing cabinet. You open a filing cabinet to pull out a record, or file. When you open *Records*, you can directly access several record types, including room records. To access rooms, click *Records* on the navigation bar, and then click *Rooms*. The Rooms page appears.

Consider the Rooms page the starting point for room records. From this page, you can add a new room or open an existing record. You can edit room record options by clicking **Edit options for Rooms**. For more information about options, see the Options chapter of the *Program Basics Guide*.

To save time when searching for a specific record, you can use the **Search for a Room by Room ID** field. The Rooms page lists recently accessed records. You can open a room in the list by clicking the room name.
Finding and Opening Room Records

When you click **Open a Room** on the Rooms page, the Open screen for room records appears. The Open screen has filters you can use to narrow your search and quickly locate the room record you want to open. The search process is not case-sensitive, so you can enter Library, library, or LIBRARY and get the same results.

You can use wildcard characters if you are not sure how a word is spelled — use a question mark to replace a single character and an asterisk to replace a series of characters. For more information about wildcards, see the *Query Guide* for *The Education Edge*.

### Opening a room record

**Note:** You can access the Open screen by selecting **File, Open** from the menu bar on the Records page.

1. On the navigation bar, click **Records**. The Records page appears.
2. Click **Rooms**. The Rooms page appears.
3. Click **Open a Room**. The Open screen for room records appears.
4. In the **Find Rooms that meet these criteria** frame, enter criteria to use to search for the room.
5. After you enter search criteria, click **Find Now**. The program searches the database and displays all records meeting your criteria.
6. In the grid, select the room record to open.

![Room Record Selection](image)

**Note:** If you have *Registrar’s Office*, additional tabs and selections appear so you can enter scheduling information.

7. Click **Open**. The room record appears.

![Room Record Details](image)

8. To save the record and return to the Rooms page, click **Save and Close**.
Adding Room Records

Room records are comprised of multiple tabs that store specific information about rooms and locations in your school. When you initially add a room record, you add room capacities and schools that can schedule the room. If your school does not use a room, you can mark it inactive.

On the General tab of a room record, you can add general information including the ID, description, and phone number of the room, capacities, and the schools that can schedule the room. If you have Registrar’s Office, you can enter scheduling restrictions. For more information, see the Records Guide for Registrar’s Office.

Note: If you have Registrar’s Office, room records have additional tabs so you can enter additional room information, such as room restrictions and scheduling requirements.

If you enter common values repeatedly for multiple room records, you can create a default set with common values to save time during data entry. The values are defaults only, and you can change default information in the fields at any time. You can load default sets on a room record by selecting Room, Load Defaults from on the menu bar. For more information about default sets, see the Program Basics chapter of the Program Basics Guide.

Adding a room record

Note: To edit an existing room record, open the record, make your changes, and save the record. For more information, see “Finding and Opening Room Records” on page 229.

1. On the Rooms page, click Add a New Room. The New Room screen appears.
2. In the Room ID field, enter an ID for the room.
3. In the Description field, enter a description of the room.
4. In the Room type field, select the type of room.
5. In the Phone field, enter the phone number or extension for the room.

Note: Rather than deleting a record from your database, we recommend you make unused rooms inactive by marking This room is inactive.
6. To set a maximum capacity for the room, mark *Maximum room capacity* and enter a number in the field.

7. To set a target capacity for the room, mark *Target room capacity* and enter a number in the field.

8. To save the record and return to the Rooms page, click *Save and Close*.

### Adding Attributes

**Note:** Attributes are defined in *Configuration*. For information about attributes, see the *Configuration Guide for Admissions Office*.

You can further define a room record by adding information to the Attributes tab. On the Attributes tab, you can add characteristics to the record and group information based on a common theme, which is useful for reporting.

You can use attributes to define specialized information for records, such as information you want to record, but for which no field is available. You can filter attributes to use in other areas of *Admissions Office*, such as *Query* and *Reports*.

You can define attributes using a variety of data types created in *Configuration*. If you make a room attribute required, a message appears reminding you to add it when creating a room record. For more information about defining attributes, see the *Configuration Guide for Admissions Office*.

- **Adding an attribute**

  1. From an open room record, select the Attributes tab. For information about opening records, see “Finding and Opening Room Records” on page 229.

**Warning:** You must define attribute types in *Configuration* before you can add them to a room record. For more information about attributes, see the *Configuration Guide for Admissions Office*. 

---

**Note:** You can define capacity and scheduling information for a room only if you have *Registrar’s Office*. The screen you have may not appear exactly as the screen pictured here.
2. In the **Attribute Type** column, select an attribute type.
3. In the **Description** column, select or enter a description of the attribute.
4. In the **Date** column, enter a date to record when you add the attribute.
5. If this attribute type is required on a room record, the program automatically marks the checkbox in the **Required** column. You cannot edit this on the Attributes tab.
6. In the **Comments** column, enter any additional comments or more detailed information about the attribute. You can enter free-form text in this column.

7. To save the attribute, click the **Save** button on the toolbar.
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