The Education Edge™

Records Guide for Registrar’s Office
102111

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In *Registrar’s Office*, you use student records to record progress and performance during a student’s enrollment at your school. Student records store and maintain biographical and contact information for students at your school. If you have *Admissions Office* and *Student Billing*, these programs work with *Registrar’s Office* so that student information is shared in the same database for the admissions office, registrar’s office, and billing office.

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

A student record created or deleted in *Registrar’s Office* is also created or deleted in *Student Billing* and, if the student is also an applicant, in *Admissions Office*. Some student 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.

You can create relationships with other records in the program. By creating relationships, you link students to individuals, faculty/staff members, organizations and other students. If you have *Admissions Office*, you can create relationships with applicants. For more information about applicant records, see the Applicants chapter of the *Records Guide for Admissions Office*.

**Note:** If you have *Admissions Office*, you can convert an applicant to a student record.

Student records are flexible. With *Registrar’s Office*, you can record each time a student enrolls at your school. You can also record enrollments at multiple schools. For example, if your school consists of a regular school and a music school, you can maintain separate enrollments for each school.

## Accessing Student Records

**Glossary:** A student is a person enrolled at your school. Student records store and maintain biographical, progress, and performance information about the student.
Because records are such an important part of Registrar’s 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 student records. To access students, click Records on the navigation bar, and then click Students. The Students page appears.

Consider the Students page the starting point for student records. From this page, you can add a new student or open an existing record. You can edit student record options by clicking Edit options for Students. 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 Student by Student Name field. The Students page lists recently accessed records. You can open a student in the list by clicking the student’s name.

Finding and Opening Student 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 a Student on the Students page, the Open screen for student records appears. The Open screen has filters you can use to narrow your search and quickly locate the student 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 a student record

Note: You can access the Open screen by selecting File, Open from the menu bar on the Records page.

2. Click Students. The Students page appears.
3. Click **Open a Student**. The Open screen for student records appears.

4. In the **Find Students that meet these criteria** frame, enter criteria to use to search for the student.

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 student record to open.
7. Click Open. The student record appears.

[Image of student record]

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

Managing Biographical Information

Note: You can set business rules for students in Configuration. For more information about business rules, see the Configuration Guide for Registrar’s Office.

Student records are comprised of multiple tabs that store specific information about people enrolled in your school. When you initially add a student record, you add biographical information about the student. As the student progresses at your school, you can access the record and enter additional information, including grades, attendance, medical information, and participation in activities.

Adding Student Records

Note: We recommend that you have a firm understanding of your school’s enrollment processes, including grade progression, before adding students.

On the Bio 1 tab of a student record, you can add biographical information that includes name, gender, address, and phone numbers. The Bio 1 tab displays quick-view information, including the grade and school in which the student is enrolled. Once a student is enrolled and you complete the Enrollments tab with more detailed information, the student’s advisor, homeroom teacher, and homeroom information appear on the Bio 1 tab. For more information about enrollments, see “Managing Enrollments” on page 25.
Before adding a new student record, consider whether you can get a head start by converting an individual record or copying student information from a record already in the program. For more information, see “Converting Individual Records” on page 167 and “Copying Student Information” on page 12.

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 student’s name, title, and suffix.

Once you enter 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 student’s name. To change the name, click Edit or double-click the student’s name to access edit mode again.

Note: If you have Admissions Office or Student Billing, you can select Student, Switch view, Applicant (Admissions Office) or Student (Student Billing) from the menu bar to view the applicant or student record in those programs. To return to the Registrar’s Office view, select Student or Applicant, Switch view, Student (Registrar’s Office).
On the Bio 2 tab, you can record birth information, residency status, online information for NetClassroom, and transportation information.

If you enter common values repeatedly for multiple student 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 student record by selecting Student, 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 students and specify duplicate student criteria in business rules in Configuration. For more information about business rules, see the Configuration Guide for Registrar's Office.

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

Tip: Before adding a student record, consider whether you can get a head start by copying student information or converting an individual already in the program. For more information, see “Copying Student Information” on page 12 and “Converting Individual Records” on page 183.
1. On the Students page, click **Add a New Student**. The New Student screen appears.

![New Student Screen](image_url)

2. In the name grid, enter the student’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 in the **Nickname** field to enter the student’s first name.

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

4. In the **Student ID** field, enter the student’s identification number.
   
   You can set a business rule to automatically generate student IDs. If this business rule is marked, the ID is automatically generated when you save the record. Student IDs must be unique. For more information about business rules, see the *Configuration Guide for Registrar’s Office*.

5. In the **Gender** field, select the student’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 student’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, enter the student’s current grade. The program automatically completes the **Next grade** field based on the school’s defined promotion schedule.
   
   You can set a business rule to automatically generate the student’s progression entry for the next year. For more information about business rules, see the *Configuration Guide for Registrar’s Office*.

8. In the **Current school** field, select the school in which the student is enrolled. This field appears only if multiple schools are defined in *Configuration*. For more information about defining multiple schools, see the *Configuration Guide for Registrar’s Office*. 
9. In the Advisor field, click the binoculars to select the student’s advisor. If the student has more than one advisor, you can select multiple advisors. Use the up and down arrows to set the order of advisors. When you save the record, the reciprocal information appears on the faculty/staff member record.

10. In the Homeroom teacher field, select the student’s homeroom teacher.

   In the Homeroom field, select his homeroom. If the faculty/staff member selected in the Homeroom teacher field has an assigned homeroom, the program automatically selects the homeroom.

11. In the Current status field, select the student’s status. The current status tracks the student’s progression through the enrollment process. The current status is also used for billing. For example, your school charges different tuition rates for Day students than Evening students so you create Current Status entries such as “Current Student - Day” or “Current Student - Evening”. Student Billing uses the assigned current status to determine which students are charged the Day or Evening tuition rate.

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

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

14. In the Hold status field, any current holds appear. To view the Hold Code Status Log, click the Hold status button. For more information about hold codes, see “Adding Hold Codes” on page 23.

**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.

15. In the Address, Country, City, State, and ZIP fields, enter the student’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 13.

16. To save the address and return to the Bio 1 tab, click OK.
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 e-mail address.

The **Link** column indicates whether the information is linked to another record in the database. If you copy and link the student’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 16.

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

If a student 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 student 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 student’s record.

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

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

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

21. To continue adding biographical information, select the Bio 2 tab.

22. If the student 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 student has been a resident and the county of residence.
23. To assign a locker to the student, click **Lockers**. The Lockers screen appears.

![Lockers Screen](image)

24. In the **Number** and **Combination** columns, enter the locker number and combination for the student’s locker.

25. Click **OK**. You return to the Bio 2 tab.

**Warning:** Before you can edit Residence Life information, the student must have a student progression entry. For more information about student progression entries, see “Updating Student Progression” on page 28.

26. In the **Board type** field, select the type of boarding the student needs for the current academic year and term. For example, you can designate whether a student lives on-campus or off-campus. The board type you select here applies to the residence life record and is used by the Status wizards in **Administration**.

27. In the **Mailbox** field, enter the student’s mailbox number.

28. In the **Residence hall** field, select the residence hall in which the student resides. If you edit the residence hall and it no longer matches the residence, the residence information is deleted from the student’s residence life record.

29. In the **Residence** field, click the binoculars to select the student’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. When you save the record, the reciprocal information appears on the roommate’s student record.

31. In the **Phone number** field, enter the phone number for the student’s residence.

**Note:** The program calculates a student’s age according to a business rule setting in **Configuration**.

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

33. If a student passes away, mark the **Deceased?** checkbox. The **Age** field disappears and the student no longer appears in your mailings.

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

**Note:** You can set a business rule in **Configuration** to automatically generate user IDs and passwords for students based on statuses and grade levels.

35. If you have **NetClassroom**, in the **User ID** and **Password** fields, the **Online Information** frame appears. Enter the student’s user ID and password for **NetClassroom**.

36. If the student rides a bus to school, in the **Transportation** frame, in the **Bus Route** field, select the student’s bus route.

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

38. If the student has permission to drive to school, mark **Car permission**.

39. To record information about the vehicle the student drives to school, enter the details in the **License plate number**, **Year**, **Make**, **Model**, and **Comment** columns.

40. Click **Save and Close**. The program saves the record, and you return to the Students page.
Copying Student Information

To save time when adding records, you can copy information to a new student record from an existing student record. If you have Admissions Office, you can also copy from applicant records.

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

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

- **Copying student information**

  **Note:** If you have Admissions Office, you can copy from applicant records. If you copy relationships, the program creates a relationship between the new student and the copied record.

1. On the Students page, click **Copy Student/Applicant Information** The Copy Student Information screen appears.
2. In the **Copy information from** field, click the binoculars to search for and select a student from which to copy.
3. In the **The new record is a [ ] of the copied record** field, select how the new record relates to the record to be copied.
4. In the **The copied record is a [ ] of the new record** fields, select how the record to be copied relates to the new record.
5. To copy addresses, leave **Addresses** marked. To copy relationships, leave **Relationships** marked.

6. To create the record, click **Create Now**. The program creates and opens the New screen for a student record.

7. Verify the information is correct and continue adding the student’s information until the record is complete. For more information, see “Adding Student Records” on page 5.

Adding Addresses

**Tip:** You can print a label or envelope directly from a student 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 student records. Each record has one primary address that 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 from the Bio 1 or from the Addresses tab. When you add an address from the Bio 1 tab, it automatically becomes the primary address for the record. When you add an address from the Addresses tab, you can designate the address as primary or leave it as an alternate, or secondary, address.

Addresses on a student record in *Registrar’s Office* are shared with the applicant record in *Admissions Office* and student record in *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 student record, select the Addresses tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

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

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 e-mail address.

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

   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 e-mail address.

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

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

   **Note:** In the contact grid, you can enter multiple contacts for the student, for example, home, fax, and cellular phone numbers and e-mail addresses.

   The **Share?** column indicates whether the information is linked to another record in the database. If you copy and link the student’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 16.
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 61.

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 a student record from another record. When you copy an address, you are merely pasting a separate copy of the address directly to the student record from another record. Changes to the address on the student record are not made to the copy, or vice versa.

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**
  
  **Scenario:** You recently added Samantha Andrews as a student in your database but did not add an address for her at the time. You learn today that Samantha’s brother is Michael, who is already a student at your school. To ensure you enter the address correctly on Samantha’s student record, copy the address from Michael’s record onto Samantha’s. You want to ensure when you change the address on either record, the change can be automatically updated on both, so also link the two addresses.

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

![Address for Samantha Rae Andrews](image)

2. Select the Home address and click **Open** on the action bar. The Address for Samantha Rae Andrews screen appears.

![Address for Samantha Rae Andrews](image)

3. To copy the address from Michael Andrew’s student record, click **Copy Address From**. The Open screen appears. Locate his 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 for Michael Richard Andrews screen appears.

![Addresses for Michael Richard Andrews](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 Michael’s address onto Samantha’s record, click **Copy Now**. You return to the Address for Samantha Rae Andrews 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**.

### Unlinking Addresses

You may find it necessary to unlink addresses, for example, for children who may live with separated parents. 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 student record, select the Addresses tab. For more information about opening records, see “Finding and Opening Student 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.
Note: When you stop sharing an address, the link is broken between only the student 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 student'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 Registrar's Office*.

On the Addressees/Salutations tab of a student 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 a student 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 students, the more flexibility you have in addressing and greeting them.

Because addressees and salutations are shared across *Registrar’s Office, Admissions 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 a “Transcripts” type that you use only on transcripts. 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 student record, select the Addressees/Salutations tab. For more information about opening records, see “Finding and Opening Student 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 *Registrar's Office, Admissions 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 additional addressee/salutation**

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

  ![Addressees/Salutations 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 **Addressee/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 Registrar’s Office**.

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

### Adding Visa/Passport Information

With student records, you can record and maintain visa and passport information, which is especially useful for exchange students, for students who travel abroad or if your school is not located in the United States.

- **Adding visa/passport information**

  ![Visa/Passport information](image)

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

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

  2. In the **Visa status** field, select the status of the student’s visa.

  3. In the **Visa number** and **Visa type** fields, enter the number of the visa and select the type of visa the student 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 *Registrar’s Office*, you can follow the demographics of your student body and use the information for queries and reports.

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

- **Adding demographic information**

**Note:** To edit existing demographic information, open the student record, make your changes, and save the record. For more information, see “Finding and Opening Student Records” on page 3.

1. On the Bio 1 tab of an open student record, click **Demographics**. The Demographic information screen appears. For more information about opening records, see “Finding and Opening Student Records” on page 3.

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

![Demographic Information for Henry Aaron](image)
3. In the **Ethnicity** field, click the binoculars to access a Selected Ethnicities screen.

From this screen, select one or multiple ethnicities for the student.

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 student’s religion and church affiliation.

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

7. In the **First language** and **Language spoken at home** fields, select the primary language spoken by the student and the language spoken in his home.

8. In the **Years in US** field, enter the number of years the student has lived in the United States.

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

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

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

**Adding Photos**

You can add a photo to a student record. If you have *Admissions Office*, the photo is shared with the applicant view of the student record.
Adding a photo

1. On the toolbar of an open student record, click the Photo button. The photo screen appears. For more information about opening records, see “Finding and Opening Student 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.

Adding Hold Codes

On the Bio 1 tab of a student record, you can add hold codes that restrict students from performing certain tasks until they complete a responsibility. When you put students on hold, you encourage them to complete their responsibilities. For example, you can put students on hold by not allowing them to register for classes until they pay their tuition.

After you define your hold codes in Configuration, you enter a hold code on the student’s record. For more information about how to define hold codes, see the Configuration Guide for Registrar’s Office.

Add a hold code

1. From an open student record, select the Bio 1 tab.
2. Click **Hold status**. The Hold Code Status Log appears.

![Hold Code Status Log](image)

3. To filter the hold code entries, in the **Date** field, select a time period. Only hold codes active during the time period selected appear.

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

4. To enter a new hold code, in the **Hold Code** column, select the student’s hold.
5. In the **Start Date** column, enter the start date for the hold.
6. In the **End Date** column, if needed, enter the end date for the hold. You can wait to enter an end date until the student has completed the responsibility.
7. In the **Reason** column, the reason you entered in *Configuration* defaults. If you want to use an alternate reason, delete existing text and enter a new reason.

   The **Date Changed** and **Changed By** columns, update automatically when an entry changes.
8. Click **OK**. You return to the Bio 1 tab.

**Warning:** Only newly added hold codes update the student’s billing status. If you change the hold code, you need to manually update the student’s billing record if applicable.

9. To add the hold code to the student’s record and update the student’s billing status, click **Save**.

### Viewing Residence Life History

On a student record, you can view the student’s residence life history. If you recently changed residence life information, you must save the student record before viewing the residence life history. When you view residence life history, the fields are read-only. For more information about how to change a student’s residence life information, see the *Residence Life Guide*.
Viewing residence life history

1. From an open student record, select **Student, Residence Life History**. The Residence Life History screen for the selected student appears.

2. To open a student’s residence life record, select the row and click **Open**. The Residence Life for screen appears.

3. When you finish reviewing the residence life record, click **OK**. You return to the Residence Life History screen.

4. To delete a student’s residence life information, select the row and click **Delete**. A warning message appears.

5. Click **Yes**. You return to the Residence Life History screen.

6. When you finish reviewing the residence life history, click **OK**. You return to the student record.

Managing Enrollments

**Note:** You can update student enrollment statuses and progression entries with status wizards. For more information, see the Status Wizards chapter of the *Administration Guide* for *The Education Edge*. 
On student records, you add information about when a student enrolls in your organization and maintain the student’s enrollment status. A student can have only one active enrollment record for the program to use. For each year, you can update a student’s enrollment status manually or use the Mark for Reenrollment wizard or End of Year Processing wizard.

Student records also contain student progression entries, which are necessary to begin the scheduling process for an academic year. You can enter student progression entries manually or generate them automatically using the Enroll Applications wizard or Mark for Reenrollment wizard.

You can access the Status Log to view a history of status changes for a student.

Adding Enrollments

On the Enrollments tab, you maintain information about a student’s enrollment at your organization including the school, date, and grade in which the student entered the organization and the student’s current status. The program automatically generates an enrollment from the information entered on the Bio 1 tab, which becomes the active enrollment by default. A student can have only one active enrollment at a time. You can designate another enrollment as the active enrollment at any time.

The current enrollment shares status information with the Bio 1 tab. Be aware that if you change information in the status fields on the Enrollment tab or select a different active enrollment, information changes on the Bio 1 tab.

Keep in mind that enrollment records are used when the student initially enrolls in your organization. You should not create new enrollment records for students reenrolling each year. For each year, you can either update status information manually or by using the Mark for Reenrollment wizard or End of Year Processing wizard. For more information about status wizards, see the Status Wizards chapter of the Administration Guide for The Education Edge.

However, if a student enters your organization multiple times because they left and returned after spending time at another school, you can record each entrance as a separate enrollment. For example, a student begins attending classes in the lower school as a fifth grader. You create an enrollment record with “Lower School” selected as the school and “5” selected as the grade enrolled. In the seventh grade, the student leaves your organization to attend a different school. After a year at the other school, the student returns to your school as an eighth grader in the middle school. You create a new enrollment record with “Middle School” selected as the school and “8” selected as the grade enrolled.

You can also maintain multiple enrollment records if a student is enrolled in multiple schools at the same time, such as Middle School and an After School program. Keep in mind that only one enrollment can be marked active and the other is for informational purposes.

You do not need multiple enrollment records if a student is taking classes in multiple schools, such as a Middle School student taking High School courses.

Also, in the Current Enrollment frame, you can enter an expected graduation date for the student. The expected graduation date can assist you when you report financial aid information.

- Adding an enrollment

Warning: Be aware that if you change information in the status fields on the Enrollments tab or mark a different active enrollment, information changes on the Bio 1 tab.
1. From an open student record, select the Enrollments tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

2. To add an enrollment, click **New Enrollment**. The New Enrollment screen for the selected student appears.

3. In the **School** field, select the school in which the student is enrolling or entering your organization. This field is not linked to the **Current school** field on the student’s Bio 1 tab. The **School** field appears only if you have defined multiple schools.

4. In the **Date enrolled from** and **to** fields, enter the dates of enrollment.

5. In the **Grade enrolled** field, select the grade in which the student is enrolling.

6. In the **Grade left** field, select the most recent grade the student was in.

7. In the **Reason left** field, you can later select the reason the student left the school or grade.

8. In the **Graduation date** and **Class of** fields, enter the expected date of graduation and the graduating class’s year.

9. In the **Current status** field, select the current status of the student. Be aware that changing the value of this field for the active enrollment changes the value of the **Current status** field on the Bio 1 tab.

**Note:** Entries in the **Current status**, **Status date**, and **Status reason** fields add an entry to the student’s status log. For more information, see “Viewing and Printing the Status Log” on page 29.

10. In the **Status date** field, enter the date of the student’s current status. Changing the value of this field for the active enrollment 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 Registrar’s Office**.
11. In the **Status reason** field, enter the reason for the student’s current status. Changing the value of this field for the active enrollment changes the value of the **Status reason** field on the Bio 1 tab.

12. To save the record and return to the Students page, click **OK**.

### Updating Student Progression

**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 *Registrar’s Office*, you can create academic years for each school for which to schedule classes.

Student progression entries record a student’s school, grade level, advisor, homeroom teacher, and homeroom for an academic year. A student progression entry must exist for an academic year before the student’s course requests can be entered for the year and scheduling activity begins.

You can manually add student progression entries or generate them automatically using a status wizard:

- You can automatically generate student progression entries for accepted applicants when running the Enroll Applications wizard (this creates the student side of their applicant records).
- You can automatically generate student progression entries for students returning to your school in the next year by running the Mark for Reenrollment wizard.

For more information about status wizards, see the Status Wizards chapter of the *Administration Guide for The Education Edge*.

#### Updating student progression

1. From an open student record, select **Student, Student Progression**. The Student Progression for screen for the selected student appears. For more information about opening records, see “Finding and Opening Student Records” on page 3.

2. To add an entry in the student progression, on the action bar click **Insert**. The program adds a row to the top of the grid. We strongly recommend you have a recent, tested backup of your database before you delete a status. You cannot recover deleted information.

3. In the **School** column, select a school for the entry.

**Warning:** Only one student progression entry can exist for each academic year. You cannot select an academic year already appearing in the student progression.

4. In the **Academic Year** column, select the academic year for the entry.

5. In the **Grade Level** column, select a grade for the entry.
6. In the Advisor column, enter an advisor’s name or click the binoculars to select the student’s advisor. If the student has more than one advisor, you can select multiple advisors. Use the up and down arrows to set the order of advisors. When you save the record, the reciprocal information appears on the faculty/staff member record.

7. In the Homeroom Teacher column, enter a homeroom teacher’s name or click the binoculars to select a name.

8. In the Homeroom column, enter a homeroom or click the binoculars to select a room.

9. To save your changes and return to the student record, click OK.

Viewing and Printing the Status Log

The status log displays status changes for students, 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 a student record
- Process student records with any of the status wizards
- Complete an action on a student record
- Add or change student records globally
- Load defaults on a student record

The status log maintains a history of each student’s status changes. For example, with the status log, you can provide an audit trail of a student’s status, quickly check the status changes and reasons when a parent or student asks about enrollment, and print a report of a student’s status history.

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

Warning: We strongly recommend you have a recent, tested backup of your database before you delete a status change. You cannot recover deleted information.

An asterisk in the grid indicates the current status of the student. A row of bold text indicates the current enrollment. The current status corresponds to the status on the current enrollment. You cannot delete statuses in bold face or with an asterisk.

Viewing a status log

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

2. To filter the enrollments 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 the column heading.
To delete a status, select a row from the grid and click **Delete**.

4. To open the student’s current enrollment, select a status in the grid. Right-click and select **Go to Enrollment**. The status log closes and the Enrollments tab appears. For more information about enrollments, see “Adding Enrollments” on page 26.

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

### Printing a status log

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

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

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

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 Student 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 Registrar’s Office.

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

6. Click **Save** to save the new 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 Student Status Report screen.

9. Close the Student 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 student 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 student records, you can create personal relationships with individuals, faculty/staff, or other students. If you have **Admissions Office**, you can also create personal relationships with applicants. For example, a student can have a parent who teaches at the school or siblings who are students.
You can also add business relationships on student records. For example, a student may be a member of an organization. By creating a business relationship with the organization, you can associate the student with actions and recommendations for the organization and add the student to organization mailings.

You add relationships to a student 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 student also appears as a relationship on the faculty/staff member’s record.

Relationship information on a student record in Registrar’s Office is shared with the applicant record in Admissions Office and student record in 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 student record, select the Relationships tab. For more information about opening records, see “Finding and Opening Student 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 student.
  5. In the Reciprocal Relationship column, select how the student is related to this person.
  6. If the relation is an emergency contact for the student, mark the checkbox in the Emergency Contact column.
  7. If the relation should receive the student’s report cards, mark the checkbox in the Receives Report Cards column.
  8. If the relation lives with the student, mark the checkbox in the Lives with Student column.
  9. If the relation should appear on the student’s transcripts, mark the checkbox in the Show on Transcripts column. You can mark this checkbox for one relation per student.
  10. If you have the optional module NetClassroom, the View NetClassroom column appears. If the relation can view the student’s information on NetClassroom, mark the checkbox in the View NetClassroom column.
  11. In the Notes field, enter any additional information about the relationship.
12. To save the record and return to the Students page, click **Save and Close**.

- **Adding a business relationship**
  1. From an open student record, select the Relationships tab. For more information about opening records, see “Finding and Opening Student 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 student.
  5. In the **Reciprocal Relationship** column, select how the student 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 Students page, click **Save and Close**.
Viewing the relationship tree

1. To view a visual representation of a student's relationships, select **Student, Relationship Tree**.

   ![Relationship Tree for Michael Richard Andrews](image)

   - Jennifer Lynn Andrews (Sister)
   - Mr. Alex Edward Andrews Jr. (Father)
   - Mr. Franklin Andrews (Grandfather)
   - Mrs. Elizabeth Browar (Mother)
   - Mrs. Maggie Anne Andrews (Elder Sister)
   - Samantha Fay Andrews (Sister)

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 student record, click **Close**.

Adding Actions

The Actions tab records any task to be completed for a student. Actions, for example, can include a phone call to a parent or parent-teacher conference. 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 guidance counselor needs to call to remind the parents their son needs to make up an exam he missed, 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 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 a student record, you can save it as an action. For more information, see “Saving Letters as Actions” on page 89.

Adding an action

**Note:** If another user already has the student 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 student record, select the Actions tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

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 School field, select the school for which to associate this action.

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

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

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.

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

9. You can print a letter for the student 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 student 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 Quick Letters for Students” on page 88.

Note: You create action letters in Configuration. For more information, see the Configuration Guide for Registrar’s Office.

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 <Student>.

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.

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

16. If the action is for a student, to change the student’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 Enrollments tab of the student record.

17. 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.

18. In the Status reason field, enter the status reason to appear on the student record.

19. 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 61.

20. To save the action and return to the Actions tab, click Save and Close.
Managing Academic Information

On a student record, you can create an educational history for the student before the student enrolled in your school.

From student records, you can also quickly view course, grade, attendance, and schedule information for students at your school.

Adding Education Information

On the Education tab you can record a student’s previous school experience, recommendations received, and related information. You can include grades and dates enrolled, courses taken and the grades awarded, and graduation status. From the student’s Education tab, you can enter grades and skills. For more information, see the Grades and Skills Guide.

Adding education information

Note: To edit existing education information, select the education record in the grid and click Open on the action bar.

1. From an open student record, select the Education tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

2. To add education information, click New Education. The New Education screen for the selected student 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 field appears. If you select “Future school”, the Student preference field appears.

4. In the School name field, enter a school or click the binoculars to search for and select a school.

**Note:** If contact information is recorded on the organization record, select a contact person in the Contact field. Information in the Address and Phones boxes automatically appears based on the contact’s information. If you do not select a contact, the organization’s information appears. For more information about organization records, see “Organizations” on page 203.

5. Information in the Organization type and Organization ID fields appears automatically based on the information on the organization record.

6. In the Date enrolled from and to fields, enter the dates the student attended this school.

7. In the Grade from and to fields, select the grade levels in which the student was enrolled.

8. In the Reason left field, select the reason the student left the school.

9. To record graduation information for the student, in the Graduation status field, select the student’s graduation status.
   In the Graduation date and Class of fields, enter the date of graduation and the graduating class’s year.

10. To print education information from this school on the student’s report cards and transcripts, mark Print education on transcript and report card.

11. To enter grades the student earned at the school, click Enter Academic Summary. For more information about entering grades for students, see the Grades and Skills Guide.

**Note:** The Education tab can hold an unlimited number of recommendations.

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


14. In the Recommendation type field, select the type of recommendation.

15. In the Recommended by field, select the person providing the recommendation. Information in the Position field automatically appears as defined on the organization record.

16. In the Has known student as a [ ] for [ ] years [ ] months fields, select how the person making the recommendation knows the student and the length of time known.

17. In the Evaluations grid, enter the information the school received for the recommendation. In the Category column, select the category for this recommendation.
18. In the **Criteria** column, select the criteria for the category.
19. In the **Rating** column, select how the person making the recommendation rates the student.

**Note:** To add media about the recommendation, select the Media tab. For more information, see “Adding Media” on page 63.

20. In the **Comments** field and **Notes** box, enter additional comments about the evaluation.

21. Click **OK**. You return to the Recommendations tab, and the new information appears in the grid.

22. To add attributes to the student’s education information, select the Attributes tab. For more information about adding attributes, see “Adding Attributes” on page 61.

23. To add notes to the student’s education information, select the Notes tab. For more information about adding notes, see “Adding Notes” on page 62.
24. To save the new information and return to the Education tab, click OK. The education record appears in the grid.

Viewing Courses

**Glossary:** A course is an area of study offered by a school. You can use course records to develop your schedule and define how classes will be created and graded each year. You can use course records to create course catalogs, report cards, and transcripts.

The Courses tab displays courses a student has taken, including the course name and description, grade level, and when the course was taken. Information on this tab is for informational purposes only and cannot be edited. For more information about courses, see “Courses” on page 253.

- **Viewing a student’s courses**
  1. From an open student record, select the Courses tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.
  2. To filter the courses that appear, make selections in the **School**, **Academic year**, **Session**, and **Term** fields.
3. To sort the courses, click a column heading. For example, to sort by alphabetically by the name of the courses, click **Course Name**.

![Image of a course list](image)

**Viewing Grades**

On the Grades tab you can view a student’s grade information, including recorded grades, skill ratings, GPA, performance, and ranking. To filter what appears, make selections in the **School**, **Academic year**, **Session**, and **Term** fields on the Grades tab. This tab is for informational purposes only and cannot be edited. For more information about grades, see the **Grades and Skills Guide**.

The list on the left of the screen displays the type of grade information you can view: **Grades/Skills**, **GPA**, **Performance**, and **Ranking**. When you select an item in the list, the right side of the screen changes to display information for that selection.

**Glossary:** An Other Course is a course on a student record with historic grade information from your school or another school.

**Grades/Skills.** Use **Grades/Skills** to view grade information. In the **Display** field, you can select to see only grades, only Other Courses, or both. In the **Sort by** field, you can sort by schedule order, course, class, teacher or print priority. Information appears in the **Grades** grid in the **Course**, **Class** and **Teacher** columns.

To view skills information, in the **Skills category** field, select <All categories> or a specific category. Information appears in the **Skills** grid in the **Skill** and **Category** columns.

**GPA.** Use **GPA** to view GPA calculations for the student. GPA calculations can include student GPAs for one marking column, the year-to-date, or cumulatively. You can run GPA calculations in **Grades**.

**Performance.** Use **Performance** to view performance categories. Performance categories are overall levels of student performance for a marking column, for example, honor roll or probation.

**Ranking.** Use **Ranking** to view ranking calculations and type. A ranking calculation determines how students qualify for a rank or percentile. You can run ranking calculations in **Grades**.

- **Viewing a student’s grades**
  1. From an open student record, select the Grades tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.
  2. In the **School**, **Academic year**, **Session**, and **Term** fields, make selections to filter the information to appear in the grids.
  3. To view grades and skills information, in the list on the left, select **Grades/Skills**.
  4. To view information for current grades and from other schools, in the **Display** field, select “Grades and Other Courses”. In the **Sort by** field, select “Course”. Courses for which the student has grades appear in the **Grades** grid.
To filter skills categories, select a category in the **Skill category** field. Skills recorded for the student appear in the **Skills** grid.

5. To view GPA calculations for the student, in the list on the left, select **GPA**.

6. To view performance calculations for the student, in the list on the left, select **Performance**.
7. To view ranking calculations for the student, in the list on the left, select Ranking.

![Image of software interface showing ranking calculations]

**Viewing Attendance**

On the Attendance tab you can view a student’s attendance and tardy information. You can view attendance for a selected school and academic year in all sessions and terms or specific sessions and terms. This tab is for informational purposes only and cannot be edited.

**Glossary:** An attendance code is what you use to designate attendance. You can define absence codes, such as Sick, and tardy codes, such as Late. You can designate whether to use codes for class or day attendance or both.

When viewing attendance details, a separate row appears for each attendance entry. When viewing an attendance summary, a row appears for each attendance code along with a total of how many times the code exists for the student. For more information about attendance, see the Attendance Guide.

- **Viewing a student’s attendance**
  1. From an open student record, select the Attendance tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.
  2. In the School and Academic year fields, select the school and academic year for which to view attendance.
  3. In the Session field, select a session to appear in the grid or select “<All sessions>”.
  4. In the Term field, select a term to appear in the grid or select “<All terms>”. You can select a specific term only if you select a specific session.

**Note:** Attendance codes are defined in Configuration. To view the code list, attendance types, and descriptions, click Code List on the action bar.
5. To view details of the student’s attendance, such as attendance code, cycle day, comments, and letters, mark **Detail** on the action bar.

6. To view a summary of attendance code information of the student’s attendance, mark **Summary** on the action bar.

7. In the **Show** field, select “Day Attendance” or “Class Attendance”.

8. To select attendance dates and codes to appear in the grid, click **Filters** on the action bar. The Attendance Display Filters screen appears.

9. In the **Attendance Dates** frame, in the **Show attendance for** field, select dates to appear in the grid.
   
   If you select “Entire academic year”, the **From date** and **To date** fields contain the date range of the academic year for informational purposes only.
   
   If you select “Specific session/term”, select the session and term in the **Session** and **Term** fields.
   
   If you select “<Specific date>”, enter a date the **From date** field.
   
   If you select “<Date range>”, enter a date range in the **From date** and **To date** fields.

   **Note:** To view all attendance codes, mark **All Attendance Codes**.

10. In the **Attendance codes** frame, mark **Selected Attendance Codes**.
11. In the All attendance codes box, select the codes and use the right arrow button to move the codes into the Include these attendance codes box.

12. To save the filters and return to the Attendance tab, click OK. Only the selected attendance codes for the selected date appear in the grid.

Viewing Student Schedules

On the Schedule tab, you can view a student’s schedule in a list or grid format.

If you are currently tracking schedule changes for the selected school, academic year, and session (as designated on the session record in Configuration), you can view changes to a student’s schedule and add comments about the changes.

For more information about editing student schedules, see the Scheduling Guide.

- Viewing a student’s schedule
  1. From an open student record, select the Schedule tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.
  2. In the School field, select the school for which to view the student’s schedule. This field appears only if you have defined multiple schools in Configuration.
  3. In the Academic year, Session, and Term fields, select the date range for which you want to see the student’s schedule.
  4. To view the schedule as a grid, mark Grid.
Glossary: You define blocks within a pattern. In each block, you specify the individual meeting times that class meetings occur. When using *Generate Master Schedule*, the program uses the meeting times in a block to assign meeting times to classes.

5. In the **Time interval** field, select the number of minutes represented on the grid within each hour.

![Image of scheduling software](image.png)

**Note:** When viewing a schedule as a list, to see more information about a specific class, including its meetings, students, and attributes, select a class and click **Open Class** on the action bar.

6. To view the schedule as a list, mark **List**.
7. To view only the first meeting of each selected class, in the **Show** field, select “First meeting only”.

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**Glossary:** In **Registrar’s Office**, a class is a section of a course. Each course can have several classes. For example, “01” in “ALGB II-01” represents the first class section.

8. To view all meetings of each class, in the **Show** field select “All meetings”.

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9. If you are currently tracking schedule changes for the session, you can click Schedule Changes on the action bar. The Schedule Changes screen appears.

![Schedule Changes Screen](image)

Note: To quickly create a spreadsheet of the schedule changes for review, right-click the grid and select Export Scheduling Change grid to Excel.

10. In the Show field, you can select to show all terms or filter the changes appearing in the grid by a specific term.

Changes appear as rows in the grid, listing the previous setting, new setting, date of the change, user who made the change, and type of change (Drop, Add, Withdrawn, Transfer).

Transfer changes appear as two rows, one row for the class transferred out of and one row for the class transferred into.

If a student withdraws from one class section but later enrolls in another class section, this change appears as Transfer.

Changes associated with deleted classes appear in green text by default. You can change this color in Options by right-clicking the grid and selecting Legend.

11. You can edit the Comments column. Comments can be up to 250 characters.

12. To save your comments and close the Schedule Changes screen, click OK.

13. When you finish viewing, close the record. You return to the Students page.

Adding Test Information

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

On the Tests tab, you can record a student's test scores, such as the Independent School Entrance Exam (ISEE), Scholastic Aptitude Test (SAT), Secondary School Admissions Test (SSAT), and Comprehensive Test of Basic Skills (CTBS). You can record results of admissions testing or other tests your school may have.
Adding test information

1. From an open student record, select the Tests tab. For more information about opening records, see “Finding and Opening Student 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 grid in the Test Type and Subtest columns, select the test and subtest for which you are adding information.

4. In the Date column, enter the date or use the calendar to select the date the student took the test.

5. In the Score and Stanine columns, enter the student’s test score and stanine rank.

6. In the Percentile 1 and Percentile 2 columns, enter the percentiles in which the student’s test score falls.

7. To print the test information 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 save the record, click the Save button on the toolbar.

Adding Medical Information

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

If you have Supervisor rights in Security, you can create a user group giving rights to only the Medical tab. By assigning the school nurse to this group, she can have access to only health and medical information for students. For more information about security groups, see the Administration Guide for The Education Edge.

Adding medical information

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

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

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

5. If the student 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 student’s insurance information was updated.

7. If the school has permission to treat the student, 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 student’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 e-mail address.

11. In the Preferred hospital field, select the student’s preferred hospital.
12. From the list on the left, select **Visits/Medications**.

13. To record details about visits to the school nurse, in the **Visits** grid, in the **Visit Type** column, select the type of medical visit, such as “Screening” or “Doctor”.

14. In the **Health Problem** column, select the reason for the visit, such as “Fever” or “Congestion”.

15. In the **Visit date**, **Time In**, and **Time Out** columns, enter the date of the visit and times the student arrived and left.

16. In the **Diagnosis** column, select a diagnosis, such as “Flu” or “Cold”.

17. In the **Comments** column, enter any additional information about the visit.

18. To add information about drugs and medications the student takes, in the **Medications** grid, in the **Medication** column, enter a medication given to the student.

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

20. In the **Times a Day?** column, enter the number of times per day the student should take the medication.

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

22. In the **Comments** column, enter any additional information about the medication. For example, you can add whether the medication should be taken with food or that it causes drowsiness.

23. From the list on the left, select **Conditions/History**.
24. In the Allergies/Conditions grid, in the Allergy/Condition column, enter the student’s allergies or medical conditions.

25. In the Effective Date and End Date columns, enter the dates the student was diagnosed and recovered from the condition.

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

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

28. In the Category and Description columns, select a category and enter a brief description of the medical history.

29. In the Comments column, you can enter additional information about the condition.

30. From the list on the left, select Immunizations.

31. In the Immunization column, select the immunizations the student has received.

32. In the Status column, select:
   • “Required” if the student needs to receive the immunization.
   • “Exempt” if the student is exempted and does not need to receive the immunization.
   • “Optional” if the immunization is not required.

33. In the Date column, enter the date the student received the immunization.

34. 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.

35. To view emergency contacts for the student, 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 the relation appears in the section at the bottom of the screen.

36. Select **Notes** from the list.

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

![Image of Insurance frames]

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

![Image of Health Provider screen]

40. 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.

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

42. 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.

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

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

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

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

Adding Activities

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

On the Activities tab, you can add a student’s extracurricular activities. You can record volunteering, employment, activities from previous schools, and activities students want 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 student record, select the Activities tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

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

2. To add an activity, click **New Activity**. The New Activity screen appears.
3. In the **Category** and **Activity** fields, select a category and type of activity.

4. In the **Comments** field, enter any comments about the activity.

5. In the **Date from** and **Date to** fields, enter the dates the student participated in the activity.

6. In the **Hours/Week** and **Weeks/Year** field, enter the number of hours per week and number of weeks per year the student participated in the activity.

7. In the **Rating** field, select a rating for how valuable the student is to that particular activity.

8. In the **Role/Position** field, select a student’s special title, role, position, or achievement to specify for the activity.

9. To print activity information on report cards and transcripts, mark **Print on report card** and **Print on transcript**.

10. To indicate a student’s preferred activity, mark **Preferred activity**.

11. In the **Participation** grid, to record more specific activity information, make selections in the **Grade Level**, **Academic Year**, and **Eligibility Status** columns. In the **Comments** column, you can add more detail about the activity.

   To indicate the student wants to participate in the activity, mark the checkbox in the **Wants to Participate** column.
To indicate the student participated in the activity, mark the checkbox in the Participated column.

12. Once you finish adding activity information, click OK. You return to the Activities tab, and the information you entered appears in the grid.

Adding Conduct

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

In Registrar’s Office, conduct is unacceptable behavior performed by a student. You can record and update a student’s conduct and results of the infraction on the Conduct tab. You can use the Notes tab of a student record to enter positive behaviors. For example, if a student should receive a warning for chewing gum in class, you can record details about the incident and its consequences.

If your school sends conduct letters, you can create a letter directly from the conduct record and record the date you send it. You can add additional information to the conduct by creating a note.
Adding conduct

1. From an open student record, select the Conduct tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

2. To add conduct information, click **New Conduct Incident**. The New Conduct screen for the selected student appears.

3. In the **Infraction** and **Date** fields, select an infraction and enter the date the incident occurred.

4. If the incident warrants a letter, you can print a letter for the student with information about the conduct.
   - To print a predefined conduct letter, in the **Conduct 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 student 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 Quick Letters for Students” on page 88.

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

6. To close the letter and return to the conduct record, click **Return to Conduct for <Student>**.

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

8. If you have multiple schools defined, in the **School** field, select the school at which the incident occurred.

9. In the **Reported by** and **Location** fields, select the faculty/staff member reporting the incident and the location in which the incident occurred.

10. In the **Consequences** grid, in the **Consequence** and **Date** columns, select the consequence of the infraction and enter the date the consequence is to occur.

11. In the **Time From** and **Time To** columns, enter the start and end times of the consequence.

12. In the **Status** column, select the status of the consequence.

**Note:** **Assign conduct** must be marked on the Bio 1 tab of the faculty/staff record.

13. In the **Assigned To** column, click the binoculars to select the faculty/staff member assigned to follow up with the consequences.
14. In the **Location** column, click the binoculars to select the room or school area in which the consequence is to occur.

**Note:** To add notes about the conduct, select the Notes tab. For more information about notes, see “Adding Notes” on page 62.

15. In the **Units** column, enter the number of units the student must complete, for example, the number of detention days.

![New Conduct for Samantha R. Andrews]

16. Once you finish adding conduct information, click **OK**. You return to the Conduct tab, and the information you added appears in the grid.

![Conduct tab]

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**Adding Financial Aid Information**

**Warning:** If a student’s financial situation changes, you can make corrections or delete the financial aid record and create a new one. Be aware that you cannot recover deleted financial aid information.

On the Financial Aid tab, you can maintain information about types of tuition assistance requested by the student, family income and expected contribution, and the type of aid the student receives. For each academic year, only one financial aid record can exist. You can create a letter about the financial aid directly from the financial aid record.
Financial aid information on a student record in *Registrar’s Office* is shared with the applicant record in *Admissions Office* and student record in *Student Billing*. If you make changes to financial aid applications in one program, the changes appear in all programs.

- **Adding financial aid information**
  1. From an open student record, select the Financial Aid tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

  ![Financial Aid Tab](image)


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

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

  ![New Financial Aid Screen](image)

  **Note:** After sending the financial aid form, mark **Form sent on []** and enter the date. Once the student 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 student’s tuition. This amount is calculated by SSS.

  The **Total annual qualification** field displays the total amount for which the student 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:** You create financial aid letters in *Configuration*. For more information, see the *Configuration Guide for Registrar’s Office*.

  10. You can print a letter for the student with information about the financial aid.
• To print a predefined financial aid letter, in the 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 student 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 Quick Letters for Students” on page 88.

Note: If you save a letter to a financial aid record, a Word icon appears in the status bar at the bottom of the record.

11. On the Word document toolbar, you can click Save this document to the financial aid to save the letter to the database with the financial aid record. You can later access the letter from the financial aid record.

12. To close the letter and return to the financial aid record, click Return to Financial Aid for <Student>.

13. Once the letter is sent, open the record and mark Letter sent on. The program automatically enters the current date.

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

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

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

17. In the Amount Qualify column, enter the amount of financial aid for which the student qualifies.

18. If financial aid is granted, access the record and enter the date granted in the Date Granted column.

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

20. If the student 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.

21. To add attributes and notes to the financial aid record, select the Attributes/Notes tab. For more information about adding attributes and notes, see “Managing Attributes, Notes, and Media” on page 61.
22. To save the record and return to the Financial Aid tab, click **OK**.

### Managing Attributes, Notes, and Media

**Note:** If you have Admissions Office or Student Billing, to change the record view, you can select Student from the menu bar. Select Switch view, Applicant (Admissions Office) or Student (Student Billing). To return to the Registrar’s Office view, select Student or Applicant and then Switch view, Student (Registrar’s Office).

You can further define a student record by adding information to the Attributes, Notes, and Media tabs. On the Attributes tab, you can add characteristics to the student record and group information based on a common theme, which is useful for reporting. On the Notes tab, you can record special information about students 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 a student.

### Adding Attributes

The Attributes tab stores additional information about a student. 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.

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

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

- **Adding an attribute**
  1. From an open student record, select the Attributes tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

![Attributes Tab Screenshot](image)

**Warning:** You must define attribute types in Configuration before you can add them to a student record. For more information about attributes, see the Configuration Guide for Registrar’s Office.

- In the **Attribute Type** column, select an attribute type.
- In the **Description** column, select or enter a description of the attribute.
- In the **Date** column, enter a date to record when you add the attribute.
- If this attribute type is required on a student record, the program automatically marks the checkbox in the **Required** column. You cannot edit this from 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 student. 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 student record, select the Notes tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.
  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 buttons and fields on the word processing toolbar to format the appearance of the text, check spelling, and use a thesaurus.
6. In the text box, enter notes to associate with the student record.

![New Note screenshot]

6. In the text box, enter notes to associate with the student record.

```
Michael has progressed well on the soccer team. I have seen him learn many new techniques this year, and his stamina has improved over last season.
```

7. To save the note and return to the Notes tab, click **Save and Close**. The new note appears in the grid.

![Media tab screenshot]

### Adding Media

On the Media tab, you can add media objects to a student 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 student record, select the Media tab. For more information about opening records, see “Finding and Opening Student 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 type 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.

**Note:** When you add media, you access applications outside the program to create the media object and save it in your database.
• For other file types, you create and add the media from 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 student record, select the Media tab. For more information about opening records, see “Finding and Opening Student Records” on page 3.

2. Click **New Media**. The Insert Object screen appears.
3. To add a media object using a previously-created file, mark **Create from File**.

![Insert Object dialog box](image)

**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 from the Media tab of the student record.

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 tab displays an historic record of key changes made to the student record. For example, if you change the student’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 tab.

- **Viewing a student’s history of changes**

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

![History tab](image)

  2. Click **Save and Close** to return to the Students page.
Managing Requirements

**Note:** If the Requirements tab is the tab you need to view most often, set the record to open to this tab by default in Options.

3. In the **Conferred on** field, you enter the date the student is awarded the degree.

4. In the **Completed on** field, enter the date the degree requirements were completed. When you mark a degree as complete, the program automatically enters a date and the degree is no longer included in processing.

5. In the **Honors earned** fields, if applicable, enter the honor the student earned for the degree and any performance levels associated with the honor. For example, you may have two performance levels for the honor roll, all A's and all A's and B's.

If you have the optional module *Graduation Requirement Management*, the Requirements tab appears on student records. On the Requirements tab, you can review the progress students are making on their diploma requirements. Select the diploma in the **Diploma** field and select the date range of the set of requirements in the **Valid for** field. The requirements appear below.

![Image of Requirements Tab]

**How Requirements Appear**

The order in which requirements appear depend on the order they are defined in Configuration. If you want to change the order, you need to edit the diploma. For more information, see the *Configuration Guide for Registrar's Office.*
Icons Indicating Progress on Requirements

Progress information is automatically updated by the program. Green checkmarks, red flags, and circular arrows indicate the student’s progress on each requirement. Under each requirement, you can view the courses taken, planned, or in progress (including the academic year and session), or view the courses needing to be taken. Grades and credits earned appear beside the course.

- Green checkmarks appear beside requirements that are complete, meaning the student has received credit in all the courses necessary for the requirement and someone approved the declaration.

- Red flags appear beside incomplete requirements.
  
  If the student has not requested, is not enrolled in, or has not taken the number of courses needed to complete a requirement, the number of credits needed is listed. For example, “Need 3.00 credits of TRIG - Trigonometry”.

- Circular arrows appear beside requirements that are planned, meaning the student has requested a course to complete the requirement, or in progress, meaning the student is currently enrolled in a course meeting the requirement.
  
  If the student has requested a course meeting the requirement, but is not yet enrolled in the course, the planned course is listed. For example, “Planned: ALG II - Algebra II”.
  
  If the student is currently enrolled in a course meeting the requirement, the course in progress is listed. For example, “In Progress: ALG I - Algebra I for 3.00 credits”.

Waiving, Substituting, or Exempting Requirements

Requirements are defined in Configuration and cannot be edited from the student record. However, you can waive, substitute, and exempt requirements for a student.

If a student transfers to your school and you create transfer course records for their courses, determine which courses satisfy requirements. You can either substitute the requirement with the transfer course or add the transfer course to the requirements defined in Configuration. For example, if it only affects one student you may just substitute. But if it affects multiple students, you may want to include the transfer course in the requirements.
Waiving a requirement

By waiving a requirement for a student, you indicate that the program consider the requirement complete and count the credits.

When you select to waive a requirement, you will see any courses already fulfilling the requirement and the number of credits earned to help you determine whether to waive the requirement and how many credits to waive.

1. On the Requirements tab of a student record, select the requirement, right-click, and select **Waive**.

![Image of the requirement grid with columns for Group, Credits, and a section for waived by and comments]

2. The number of credits needed for the requirement appears at the top of the screen. Mark **Waive [ ] credits of the requirement** and enter the number of credits to waive.

   Your user name appears in the **Waived by** field. You cannot edit this.

3. If you defined more than one group for the requirement, in the **Group** column, you can select to which group the waive applies.

4. If you applied the waive towards a requirement group, enter the amount of credits for the waive. The sum of the waived credits for the groups cannot be more than the number of credits you entered in step two.

5. In the **Comments** field, you can explain why you are waiving the requirement.

   In the grid, courses already fulfilling the requirement and the number of credits earned appear for informational purposes only.

6. To waive the requirement and return to the Requirements tab, click **OK**.
Substituting a requirement

By substituting a requirement, you can replace the credits needed with credits already earned from another course.

1. On the Requirements tab of a student record, select the requirement, right-click, and select Substitute.

2. The number of credits needed for the requirement appears at the top of the screen. Mark Substitute credits of the requirement with the following and enter the number of credits to substitute.

   Your user name appears in the Substituted by field. You cannot edit this.

3. In the Substitute With column, enter the courses to use as substitutions. You can click the binoculars to search for and select a course.

   To qualify as a substitution, the student must have taken the course or currently be enrolled in the course.

4. In the Credits Used column, the number of credits the course is worth appears. This helps you determine that you have enough credits with which to substitute. You can also edit this field if needed.

   For example, if the number you entered in Substitute credits of the requirement with the following is less than the total of credits in the Credits Used column, you can edit the number of credits used for each course row. In this example, if you want to substitute four credits in the English requirement with two courses worth three credits each. You can choose how many credits from each course to count. You could choose to apply three credits for one course and one credit for the other. Or, you could choose to apply two credits from each course.

5. Only courses not already fulfilling the requirement, can be selected.

6. If you defined groups for the requirement in Configuration and if the course is not substituting for a specific course, in the In column, select the group to which the course substitutes.

7. In the Use in Other Requirements column, if other requirements can use the course, mark the checkbox.

   For example, if you want a writing course to substitute for a course in the English requirement and also count towards the general elective requirement, mark the checkbox.

8. In the Comments field, you can explain why you are substituting the requirement.

9. To substitute the requirement and return to the Requirements tab, click OK.
Exempting a requirement
By exempting a student from a requirement, you indicate that the student does not have to complete the requirement but does have to make up the credits of the requirement elsewhere.

When you select to exempt a requirement, you will see any courses already fulfilling the requirement and the number of credits earned to help you determine whether to exempt the requirement and how many credits to exempt.

If you exempt credits in a general elective requirement, when you save the exemption, the general elective requirement credits increase. You have to make up the credits you exempted. However, if no requirement is marked general elective, the exempted credits are not added to any requirement.

1. On the Requirements tab of a student record, select the requirement, right-click, and select Exempt.

2. The number of credits needed for the requirement appears at the top of the screen. Mark Exempt [ ] credits of the requirement and enter the number of credits to exempt.
   Your user name appears in the Exempted by field. You cannot edit this.

3. If you defined more than one group for the requirement, in the Group column, you can select to which group the exemption applies.

4. If you applied the exemption towards a requirement group, enter the amount of credits to exempt. The sum of the exempted credits for the groups cannot be more than the number of credits you entered in step two.

5. In the Comments field, you can explain why you are exempting the requirement.
   In the grid, courses already fulfilling the requirement and the number of credits earned appear for informational purposes only.

6. To exempt the requirement and return to the Requirements tab, click OK.

Additional Courses List
An Additional Courses section appears at the bottom of the requirements pane, listing any the student has taken that do not fit within any requirements above. For example, the course may not be included in a requirement, too many courses were taken for a requirements, the student did not receive credit for the course, or the student audited the course.
Action Bar Buttons

- To select a transcript to view, click Transcript on the action bar.
- To select a Requirements Audit Report, click Print Audit on the action bar.
- To view a summary of progress, click Summary on the action bar. For more information, see “Viewing a summary of progress on requirements” on page 72.
- To expand or collapse requirements in the list, you can use the Expand and Collapse buttons on the action bar or double-click the requirement names in bold in the list.
- On the action bar, you can filter the requirements appearing the grid by status.
  - In Progress—courses the student is currently enrolled in that meet the requirements.
  - Complete—courses the student was previously enrolled in and received credit for that meet the requirements.
  - Unfulfilled—the student has not requested or enrolled in the courses to meet the requirements.
  - Planned—courses the student has requested to meet the requirements.

To open a course record, select the course in the list, right-click, and select Open.

Viewing a summary of progress on requirements

1. On the Requirements tab of a student record, click Summary. The Summary screen appears.
2. In View status of, select the degree, major, minor, concentration, or option for which to view progress. Percentages are based on number of credits and include these status categories:
   - In Progress—courses the student is currently enrolled in that meet the requirements.
   - Complete—courses the student was previously enrolled in and received credit for that meet the requirements.
   - Unfulfilled—the student has not requested or enrolled in the courses to meet the requirements.
   - Planned—courses the student has requested to meet the requirements.
3. To view the student’s progress on requirements as a pie chart, select Graph from the action bar.
4. To view progress in a table, select **Table** from the action bar. For each status category, the number of credits are listed.

<table>
<thead>
<tr>
<th>Status</th>
<th>Number of Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unfilled</td>
<td>10,000</td>
</tr>
<tr>
<td>Planned</td>
<td>8,000</td>
</tr>
<tr>
<td>In Progress</td>
<td>7,000</td>
</tr>
<tr>
<td>Complete</td>
<td>1,000</td>
</tr>
</tbody>
</table>

Note: The minimum number of credits of the diploma is not being used to calculate these values. 3.85% Complete

5. To close the Summary screen and return to the student record, click **Close**.

---

### Creating Letters from Student Records

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 student directly from the student 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 Registrar’s 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 student export and a simple or conditional **Word** merge file. For more information, see “Creating Merged Letters for Students” on page 74.

You can also create a quick letter for a student by selecting **Write a letter** from the **Letter** menu. This generates a **Word** document with basic student 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 Quick Letters for Students” on page 88.

You can select **Modify Letter Menu** to organize and edit saved letter formats. For more information, see “Organizing and Editing Letter Formats” on page 89.

When a letter is complete, you can save it as an action. For more information, see “Saving Letters as Actions” on page 89.
Creating Merged Letters for Students

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 fall registration. The body of the letter is the same for all students, but the address section is customized with the recipient’s name, address, and student ID.

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 students who graduated, withdrew, or were retained this year. Using the conditional merge process, you define conditional statements that match students with the letter they should receive based on their current status. For more information about setting up exports and Word merges, see the Export Guide.

- Creating a new simple merge letter from a student 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 student record, select Letter, Create a New Letter Format. The New Student Letter screen appears.

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

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

```plaintext
New Student Letter
Letter description:
Inactive

Associate this letter with a Simple or Conditional Word Merge export if you wish to use this letter to perform a mail merge from a Student. The export defines the main document and merge fields to use for the letter.

Blackbaud Word Merge export

OK Cancel
```
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](image1)

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](image2)

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

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 Student Export screen.
11. Click **Save and Close**. The Save Export As screen appears.

![Save Export As](image)

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

![New Student Letter](image)

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

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

![Modify Letter Menu](image)
15. Click **Search** to access the Search Student Letters screen.

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

17. Click **Close**. You return to the student 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 Letters as Actions” on page 89.

19. Click **Print**.

20. To close the letter and return to the student record, click **Return to <Student>**.
Creating a new conditional merge letter from a student record

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

2. In the Letter description field, enter a description for the letter. This description appears in the Letter menu and Student 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.

   ![Create a New Export](image)

   The **What type of export do you want to create?** box displays “Student” 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 Student Export screen appears.

   ![New Student Export](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](image1)

8. When finished selecting fields, click **Conditional merge wizard**. The Blackbaud Conditional Word Merge Wizard screen appears.

![Conditional merge wizard](image2)
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 “Withdrawn - May Reenroll” 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 Student Export screen.
19. Click **Save and Close**. The Save Export As screen appears.

![Save Export As](image)

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

21. To save and close the New Student Letter screen, click **OK**.

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

![Modify Letter Menu](image)

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

![Search Student Letters](image)
24. Select the letter to add and click **Open**. The Search Student Letters screen closes and the new letter appears in the list.

![Modify Letter Menu](image)

25. Click **Close**. You return to the student record.

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

![Patticia Ann Garrett](image)

**Note:** You can click **Save this document as an action** to save the letter as an action. For more information, see “Saving Letters as Actions” on page 89.
A processing screen appears as the letter generates and then *Word* opens displaying the merged letter for the condition that matches the student.

27. Click **Print**.

28. To close the letter and return to the student record, click **Return to <Student>**.

Creating Quick Letters for Students

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, student 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 student

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

  1. From the menu bar of a student record, select **Letter, Write a Letter**.
A processing screen appears as the letter generates and then the Word document appears with the current date, student name, and student 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 Letters as Actions” on page 89.
4. To close the letter and return to the student record, click Return to <Student>.

Saving Letters as Actions

Note: You can also create action letters from the student’s Action tab. For more information, see “Adding Actions” on page 33.

When a letter is complete, you can save it as an action. This creates an action record for the student with the current date as the Start date and Action completed on date. The description of the action is “Letter to <Student>”. To view the action, select the Actions tab of the student 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 Registrar’s 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 student record, click Return to <Student>.

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 student record, select Letter, Modify Letter Menu. The Modify Letter Menu screen appears.

The Show these letters in the letter menu box lists the student 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 student record to quickly print the same letter for that student. Letter formats are also added to Student Letters in Configuration.

- To add a letter to the menu, click Search to access the Search Student Letters screen. Select the letter to add and click Open. The Search Student Letters screen closes and the new letter appears in the list.
- To create a new merged letter, click New. The New Student Letter screen appears. For more information about creating merged letters, see “Creating Merged Letters for Students” on page 74.
- To open a letter format, select the letter and click Open. The Student 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 91.
- 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 student record.
Editing a saved letter format

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

2. Select the letter to edit, and click Open. The Student 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.

![Screenshot of Student Fall Registration export screen](image1)

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

![Screenshot of Word document](image2)

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 Student Letter screen.

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

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

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In *Registrar’s Office*, you use faculty/staff records to maintain and store biographical and contact information for teachers, recruiters, advisors, and other school employees. You can create relationships between records, including individuals, students, organizations, and other faculty/staff members. If you have *Admissions Office*, you can create relationships with applicant records.

With faculty/staff records, you can assign actions to staff members, such as conducting a conference or a phone call to parents. These actions are recorded on the staff member’s record and can be assigned a priority.

Because faculty/staff members often serve as advisors to students, you can assign advisees on faculty/staff records. The advisor’s name appears in the *Advisor* field on the student record. You can open student records from the Advisee screen and remove advisees.

### 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 *Registrar’s 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 new 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 several 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 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.

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.

**Note:** For more information about filtering criteria on the Open screen, see the Program Basics chapter of the *Program Basics Guide*.
6. In the grid, select the faculty/staff member to open.

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

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 maintain and 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

On the Bio 1 tab of a faculty/staff record, you enter personal details about a 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 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.
Once you enter the name information, click OK on the right side of the grid to access View mode.

Dr Justin Neil McCoy

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.

Note: You can set a business rule to automatically check for duplicate faculty/staff members in Configuration. For more information about business rules, see the Configuration Guide for Registrar’s Office.

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 duplicate faculty/staff members 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 Registrar’s Office.

Adding a faculty/staff record

1. From the Faculty/Staff page, click Add a New Faculty/Staff Member. The New Faculty/Staff member screen appears.

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 Registrar’s 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 list are defined on the **Affiliation** table in *Configuration*.

**Note:** If you have **NetClassroom**, **User ID** and **Password** fields appear so you can enter the faculty/staff member’s user ID and password for NetClassroom. Faculty/staff members related to students can access NetClassroom.

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. Mark checkboxes to indicate additional duties of the faculty/staff member:
   - **Current teacher** — If the faculty/staff member is a current teacher in your school
   - **Current advisor** — If the faculty/staff member can be assigned advisees
     Unmarking **Current advisor** does not remove an advisee currently assigned to the faculty/staff member. To remove a faculty/staff member as an advisor for a student, you must remove the faculty/staff member from the student’s progression entry.
   - **Assign conduct** — If the faculty/staff member can assign conduct on student records
   - **Current recruiter** — If you have **Admissions Office**, 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 107.

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 e-mail 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 110.

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**.

### Assigning Advisees

**Note:** To remove a student as an advisee, select the student in the grid and click **Remove Advisee**.

If you mark a faculty/staff member as a current advisor, you can assign advisees for the current academic year. The advisor’s name appears in the **Advisor** field on the student record. If you do not mark **Current advisor** on the Bio 1 tab, you cannot assign advisees to the faculty/staff member.

You can open a student record from the Advisee screen and remove advisees.

- **Adding an advisee**
  1. From an open faculty/staff member record, select the Bio 1 tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.

**Note:** To add advisees, **Current advisor** must be marked. Otherwise, you can only view previous advisees.
2. Click **Advisees**. The Advisees of screen appears.

![Advisees screen]

3. To add an advisee, in the **Academic year** field, select the current academic year. When you add the advisee, the program adds the information to the student progression. For more information, see “Updating Student Progression” on page 28.

To further narrow the information you enter, you can select grade levels and student statuses in the **Grade level** and **Status** fields.

4. Click **New Advisee** 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 Advisees screen, and the selected student appears in the grid.

![Advisees grid]

5. To save the advisee information, click **OK**. You return to the Bio 1 tab.

### 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**. The Visa/Passport information screen for the selected faculty/staff member appears. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.

![Visa/Passport screen]

**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 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.
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 *Registrar’s 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.

- **Adding demographic information**
  1. On the Bio 1 tab of an open faculty/staff record, click **Demographics**. The Demographic information screen appears. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.

```plaintext
<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is Hispanic/Latino</td>
<td>Yes</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Latino/Hispanic</td>
</tr>
<tr>
<td>Religion</td>
<td></td>
</tr>
<tr>
<td>Church affiliation</td>
<td></td>
</tr>
<tr>
<td>Citizenship</td>
<td></td>
</tr>
<tr>
<td>First language</td>
<td></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>Married</td>
</tr>
<tr>
<td>Maiden name</td>
<td>Vine</td>
</tr>
</tbody>
</table>
```

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.

   ![Selected Ethnicities](image)

   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 at 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 *Registrar's Office* is shared with the faculty/staff record in *Admissions 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.

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 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 from the Bio 1 or from the Addresses tab. When you add an address from the Bio 1 tab, it automatically becomes the primary address for that record. When you add an address from 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 more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.

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

 Note: You can also access the Address screen by clicking the Address button on the Bio 1 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 e-mail address.

**Note:** In the contact grid, you can enter multiple contacts for the faculty/staff member, 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 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 110.

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 131.

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 a faculty/staff record from another record. When you copy an address, you are merely pasting a separate copy of an address directly to a faculty/staff record from another record. Changes to the address on the faculty/staff record are not made to the copy, or vice versa.

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**

  **Scenario:** You recently added Ann Kelly as a parent in your database and did not add an address for her at the time. To ensure you enter the address correctly on Ms. Kelly’s individual record, copy the address from her daughter Cary’s record onto Ms. Kelly’s. You want to ensure when you change the address on either record, the change can be automatically updated on both, so also link the two addresses.

  **Note:** While this procedure demonstrates copying and linking a faculty/staff address to a student, you can use it as a model for copying and linking addresses to other record types.
1. From Jane McCall’s open faculty/staff record, select the Addresses tab. For more information about opening faculty/staff records, see “Finding and Opening Faculty/Staff Records” on page 97.

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

3. To copy the address from Kate O’Brien’s student record, click Copy Address From. The Open screen appears. Locate her 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 for Kate O’Brien screen appears.

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

5. To link the addresses, mark Link these addresses.
To copy Kate’s address onto Jane’s record, click **Copy Now**. You return to the Address for Jane McCall screen, and the copied address information appears. The **Link?** column indicates contact types are linked.

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 more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
2. Select the address to unlink and click **Open**. The Address screen appears.

![](address_screen.png)

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

![](shared_addresses_screen.png)

**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.

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**

**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 Registrar’s Office*. 
On the Addressees/Salutations tab of 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 to 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 more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.

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

1. From an open faculty/staff record, select the Addressees/Salutations tab. For more information about opening records, see "Finding and Opening Faculty/Staff Records" on page 97.

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

3. In the Address/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 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 students, individuals, or other faculty/staff members. If you have Admissions Office, you can also create personal relationships with applicants. For example, a faculty/staff member can have children who are students 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 a student, the faculty/staff member also appears as a relationship on the student’s record.
Adding a personal relationship

1. From an open faculty/staff member record, select the Relationships tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.

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.

![Image of Faculty/Staff relationship page]

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 more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
  2. In the **Show** field, select “Business relationships”.

![Image of Business relationships page]
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.

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.

Managing Scheduling Information

You can enter information on faculty/staff records that can make your scheduling tasks easier. For more information, see the Scheduling Guide.

Glossary: In Registrar’s Office, a class is a section of a course. Each course can have several classes. For example, “01” in “English 102-01” represents the first class section.

You can enter restrictions that include a specific room the teacher uses, the maximum number of classes, meetings, and consecutive meetings a teacher can have per term. You can designate the days or times in which the teacher cannot be scheduled. To save time and maintain consistency, you can copy faculty restrictions from one academic year to the next.

You can select the courses a faculty member teaches and the target and maximum number of classes for each course. You can set scheduling priorities for a teacher’s courses.

To see an overview of a faculty member’s schedule, you can view the schedule from the Schedule tab. This tab is for informational purposes only and cannot be edited. From the Schedule tab, you can view information about a specific class, including meetings, students enrolled, and attributes.
Adding Restrictions

On the Restrictions 1 tab of faculty/staff records, you can designate that a teacher can be scheduled only in a certain room. You enter the teacher’s maximum number of classes per term, maximum number of meetings per day, and maximum number of consecutive meetings per day. If your organization has multiple schools, you can associate the teacher with the applicable schools. You can specify students that the teacher is not allowed to teach. The restrictions on the Restrictions 1 tab are not specific to an academic year or session.

**Note:** We recommend you define the time allotted for a faculty member’s lunch as a restriction. You define student lunches on timetables. For more information about timetables, see the *Configuration Guide for Registrar’s Office*.

On the Restrictions 2 tab, you can designate the days or times in which the teacher cannot be scheduled. Scheduling restrictions on a faculty/staff record are specific to a school, academic year, and session. If you do not define restrictions for a faculty member, the faculty member is always available.

- **Adding restrictions**
  1. From an open faculty/staff record, select the Restrictions 1 tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
  2. To schedule the teacher in only a specific room, mark *Only allow this faculty/staff member to be scheduled for classes in [ ]* and select “Homeroom” or “Specific Room”.
     - If you select “Homeroom”, the program automatically enters the homeroom ID in the next field. You cannot edit this field.
     - If you select “Specific Room”, click the binoculars to search for and select a room.
  3. To set a maximum number of classes you can assign to the teacher per term, in the *Allow a maximum of [ ] classes to be scheduled per term for this faculty/staff member* field, enter a number of classes.
  4. To set a maximum number of classes the teacher can meet each day, in the *Allow a maximum of [ ] meetings to be scheduled per day for this faculty/staff member* field, enter a number of classes.

2. To schedule the teacher in only a specific room, mark **Only allow this faculty/staff member to be scheduled for classes in [ ]** and select “Homeroom” or “Specific Room”.
   - If you select “Homeroom”, the program automatically enters the homeroom ID in the next field. You cannot edit this field.
   - If you select “Specific Room”, click the binoculars to search for and select a room.

3. To set a maximum number of classes you can assign to the teacher per term, in the *Allow a maximum of [ ] classes to be scheduled per term for this faculty/staff member* field, enter a number of classes.

4. To set a maximum number of classes the teacher can meet each day, in the *Allow a maximum of [ ] meetings to be scheduled per day for this faculty/staff member* field, enter a number of classes.
5. To set a maximum number of consecutive classes the teacher can have each day, in the **Allow a maximum of [ ] consecutive meetings to be scheduled per day for this faculty/staff member** field, enter a number of classes.

6. To select schools in which a faculty/staff member can be scheduled, in the **Schedule in these schools** box, mark the schools.

7. To select schools in which a faculty/staff member can view gradebooks, in the **View student progress and review faculty comments in** box, mark the schools.

8. To select which grade levels a faculty/staff member advises students, click the binoculars. A screen appears for you to choose which grade levels to include.

9. To create an Advisor Assignments report in which to generate a list of students the faculty/staff member is advising, click **View Assigned Students**. A screen appears for you to select a parameter file to run the report.

10. To select students with whom you cannot schedule the teacher, in the **These students CANNOT be scheduled for classes with this faculty/member** grid, select the students.

    In the **Student Name** column, click the binoculars to search for and select a student. The program automatically completes the **Record ID**, **Current Grade**, and **School** columns from information on the student record.

11. To continue adding restrictions, select the Restrictions 2 tab.

    If you are finished adding restrictions, click **Save and Close** to save the restrictions and return to the Faculty/Staff page.

12. In the **School** field, select the school for which to add restrictions for the faculty/staff member.

13. In the **Academic year** and **Session** fields, select the year and session for which to add restrictions.

14. In the **This faculty/staff member is** field, select “Not available for scheduling during these days and times”.

    **Warning:** If you leave the default “Always available for scheduling”, you cannot define restrictions based on the selected academic year.

15. In the **Cycle Day** column, select the cycle day the teacher is unavailable or “<All Cycle Days>”.

    • If you select a cycle day, proceed to step 16.
    • If you select “<All cycle days>”, proceed to step 18.

16. In the **Restrict Availability By** column, select “Period”, “Time”, or “Cycle Day”

    • If you select “Period”, you can restrict the teacher for a period in the cycle day and proceed to step 17.
    • If you select “Time”, you can restrict the time of day in which the teacher is available and proceed to step 18.
    • If you select “Cycle Day”, you can restrict the teacher for the entire cycle day and proceed to step 19.
17. In the **Unavailable Period** column, select the period in which the teacher is not available and proceed to step 19.

18. In the **Unavailable From Time** and **Unavailable To Time**, enter the times between which the teacher is unavailable and proceed with the next step.

19. To continue adding scheduling restrictions, return to step 15. If you do not need to add more restrictions, proceed with the next step.

![Faculty/Staff page](image)

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

## Copying Restrictions

To save time when adding records, you can copy faculty/staff restrictions from one academic year and session to another academic year and session. By copying faculty restrictions, you can ensure the restrictions remain consistent from year to year. Before adding a faculty/staff record, consider whether you can get a head start by copying information from a record already in the program.

### Copying restrictions

**Note:** To copy information from an open record, select **Faculty/Staff, Copy Restrictions** from the menu bar.

1. On the Faculty/Staff page, click **Copy Faculty Restrictions**. The Copy Faculty Restrictions screen appears.

![Copy Faculty Restrictions](image)

2. In the **Faculty** field, select the teacher for whom to copy restrictions or select “<All Faculty>”.

3. In the **Copy restrictions from** frame, select the school, academic year, and session from which to copy faculty restrictions.

4. In the **Copy restrictions to** frame, select the school, academic year, and session to which to copy faculty restrictions.

![Copy Faculty Restrictions dialog box](image)

5. To copy and save the restrictions, click **OK**. You return to the Faculty/Staff page.

### Adding Courses

**Glossary:** A course is an area of study offered by a school. You can use course records to develop your schedule and define how classes will be created and graded each year. You can use course records to create course catalogs, report cards, and transcripts.

On the Courses tab you can select the courses for which a teacher can be scheduled and the target and maximum number of classes for each course. You can set the scheduling priority for each course. For more information about courses, see “Courses” on page 253. You can add this information for teachers on the Resources tab of course records.

- **Adding a course**
  1. From an open faculty/staff record, select the Courses tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
  2. In the **Course ID** column, click the binoculars to search for and select the course for which to schedule for the teacher.
  3. The program automatically enters information in the **Course Name** and **School** columns from information on the course record.

**Note:** The **School** column appears only if multiple schools are defined in **Configuration**. For more information about defining multiple schools, see the **Configuration Guide for Registrar’s Office**.
4. In the **Priority** column, select “Standard”, “Low”, or “High”. For example, a faculty/staff member who has priority a priority of “High” to teach a 12th-grade course may have a priority of “Low” for a ninth-grade course.

5. In the **Target # of Classes per Term** column, enter the number of classes the teacher should be assigned for this course.

6. In the **Maximum # of Classes per Term** column, enter the maximum number of classes you can assign to the teacher for this course.

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

### Viewing Faculty/Staff Schedules

On the Schedule tab you can view a teacher’s schedule for each academic year and session. This tab is for informational purposes only and cannot be edited. For more information about schedules, see the *Scheduling Guide*.

- **Viewing a faculty/staff member’s schedule**
  1. From an open faculty/staff record, select the Schedule tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
  2. In the **School** field, select the school for to view the teacher’s schedule. This field appears only if you have defined multiple schools in *Configuration*.
  3. In the **Academic year**, **Session**, and **Term** fields, select the date range for which you want to see the teacher’s schedule.

**Glossary:** You define blocks within a pattern. In each block, you specify the individual meeting times that class meetings occur. When using *Generate Master Schedule*, the program uses the meeting times in a block to assign meeting times to classes.
4. To view the schedule as a grid, mark **Grid**.

5. In the **Time interval** field, select the number of minutes represented on the grid within each hour.

6. To view the schedule as a list, mark **List**.

7. To view all meetings of each class, in the **Show** field select “All meetings”.
8. To view only the first meeting of each selected class, in the **Show** field, select “First meeting only”.

9. When you finish viewing, close the record and return to the Faculty/Staff page.

### Adding Conduct

In **Registrar's Office**, conduct is unacceptable behavior performed by a student. You can record and update a student’s conduct and results of the infraction on the Conduct tab of a faculty/staff record. For example, if a student should receive a warning for chewing gum in class, you can record details about the incident and its consequences. You can use the Notes tab of a student record to enter positive behaviors.

If your school sends conduct letters, you can create a letter directly from the conduct record and record the date you send it. You can add additional information to the conduct by creating a note.

- **Adding conduct**

  1. From an open faculty/staff record, select the Conduct tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.

  2. In the **School** field, select the school for which to add conduct for a student.

  3. In the **Academic year** and **Session** fields, select the year and session for which to add conduct.

**Note:** To edit existing conduct information, select an incident in the grid and click **Open** on the action bar.
4. To add conduct information, click **New Conduct Incident**. The New Conduct screen for the selected student appears.

5. In the **Infraction** and **Date** fields, select an infraction and enter the date the incident occurred.

   **Note:** You create conduct letters in **Configuration**. For more information, see the **Configuration Guide for Registrar's Office**.

6. If the incident warrants a letter, you can print a conduct letter for the student assigned the infraction.
   - To print a predefined conduct letter, in the **Conduct 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 student 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 Quick Letters for Faculty/Staff” on page 150.

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

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

8. To close the letter and return to the conduct record, click **Return to Conduct**.

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

10. If you have multiple schools defined, in the **School** field, select the school at which the incident occurred.

11. In the **Student** and **Location** fields, select the student whose conduct you are reporting and the location in which the incident occurred.

12. In the **Consequences** grid, in the **Consequence** and **Date** columns, select the consequence of the infraction and enter the date the consequence is to occur.

13. In the **Time From** and **Time To** columns, enter the start and end times of the consequence.

14. In the **Status** column, select the status of the consequence.
In the **Assigned To** column, click the binoculars to select the faculty/staff member assigned to follow up with the consequences.

16. In the **Location** column, click the binoculars to select the room or school area in which the consequence is to occur.

**Note:** To add notes about the conduct, select the Notes tab. For more information about notes, see “Adding a note” on page 132.

17. In the **Units** column, enter the number of units the student must complete, for example, the number of detention days.

18. Once you finish adding conduct information, click **OK**. You return to the Conduct tab, and the information you added appears in the grid.

**Adding Actions**

**Note:** If you have **Admissions Office**, you can assign faculty/staff members to complete actions for applicants.

The Actions tab records any task to be completed for an individual. Actions, for example, can include a phone call to a parent or parent-teacher conference. 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 sends a reminder when the action is due. For example, if the guidance counselor needs to call to remind the parents their son needs to make up an exam he missed, 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 a faculty/staff record, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 150.

**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 more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
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.

![New Action Screen](image.png)

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.

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

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

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

12. You can print a letter for the person selected in the **Select action for** field with information about the action.

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

- 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 Quick Letters for Faculty/Staff” on page 150.

**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 student’s Bio 1 and Enrollments tabs.

17. If the action is for a student, to change the student’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 Enrollments tab of the student 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 student record.

20. 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 130.

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 Registrar’s 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 *Registrar’s 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 Registrar’s 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 Registrar’s Office*.

1. From an open faculty/staff record, select the Attributes tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
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 from 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

1. From an open faculty/staff record, select the Notes tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.

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.

6. In the text box, enter the information you need to remember.

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 media objects or retrieve existing media objects to save in the record.

1. From an open faculty/staff record, select the Media tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
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 type 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 from 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.

**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.
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
  1. From an open faculty/staff record, select the Media tab. For more information about opening records, see “Finding and Opening Faculty/Staff Records” on page 97.
  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.

Viewing a faculty/staff member’s history of changes

1. 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.

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

Creating Letters from Faculty/Staff Records

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 Registrar’s 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 Merged Letters for Faculty/Staff” on page 136.

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 Quick Letters for Faculty/Staff” on page 150.

You can select Modify Letter Menu to organize and edit saved letter formats. For more information, see “Organizing and Editing Letter Formats” on page 151.
When a letter is complete, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 150.

Creating Merged Letters for Faculty/Staff

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 faculty 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.

  ![New Faculty/Staff Letter](image)

  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 screen](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”.
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.

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 example]

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 150.

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.

![New Faculty/Staff Letter dialog box]

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.

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 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.

![Modify Letter Menu](image1)

23. Click Search to access the Search Faculty/Staff Letters screen.

![Search Faculty/Staff Letters](image2)

24. 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](image3)

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.

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.

**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 150.

27. Click **Print**.

28. To close the letter and return to the faculty/staff record, click **Return to <Faculty/Staff>**.
Creating Quick Letters for Faculty/Staff

You can create a quick letter for a faculty/staff member 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.

     ![Word document example](image)

     Wednesday, May 04, 2005
     Mr. Patrick Gene Hodges
     2005 Rivers Avenue
     Charleston, SC 29405
     Dear Patrick Hodges,

     —

     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 150.
     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 128.

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 Registrar’s 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**.
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.

   The Show these letters in the letter menu box lists the faculty/staff letters selected to appear in the Letter menu.

   • 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 Merged Letters for Faculty/Staff” on page 136.

   • 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 152.

   • 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.
Individuals

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In Registrar’s Office, you use individual records to maintain and store biographical and contact information for persons affiliated with your school but who are not students, or faculty/staff members. For example, you can use individual records to record information for relations of students, potential students and faculty/staff, contacts at other organizations, persons submitting recommendations for students, and volunteers.

Note: For more information about individual records in Admissions Office, see the Individuals chapter of the Records Guide for Admissions Office. For more information about individual records in Student Billing, see the Individuals chapter of the Records Guide for Student Billing.

If you have Admissions Office and Student Billing, these programs work with Registrar’s 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 Registrar’s Office is also created or deleted in Student Billing and Admissions Office. 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 you create an individual record, if the status of that person changes and becomes a student or faculty member, you can convert the individual record to a student or faculty/staff record. If you have Admissions Office, you can convert the individual to an applicant record.

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 Registrar’s 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

**Note:** If you have Admissions Office, you can link and convert applicant records.

When you click Open an Individual on the Individuals page, the Open screen for individual records appears. The Open screen has several 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 individual record
  2. Click Individuals. The Individuals page appears.
  3. Click Open an Individual. The Open screen for individual records appears.

  ![Open an Individual screen](image)

  4. In the Find Individuals that meet these criteria frame, enter criteria to use to search for the individual.
  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 record 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 maintain and 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.

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.

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 individual’s name. If you need to change the name, click Edit or double-click the individual’s name to 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 Individual, Duplicate Search. For more information about business rules, see the Configuration Guide for Registrar’s Office.

### Adding an individual record

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


![New Individual Screen](image)

2. In the name grid, enter the individual’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 in the Nickname field to enter the student’s first name.

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 Registrar’s Office.

4. In the Affiliation field, select the individual’s affiliation with your school.

5. In the Gender field, select the individual’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 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 the name the student prefers to be called.

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 173.

9. In the **Birth date** field, enter the individual’s birth date. The program calculates and displays the age in the **Age** field. If the individual has deceased, mark the **Deceased?** checkbox. If marked, the **Age** field does not appear.

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 162. The address entered here becomes the primary address by default. You can change the primary address designation on the Addresses tab.

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 e-mail 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 164.

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 168.

15. To record demographic information about an individual, click **Demographics**. For more information about entering demographics, see “Adding demographic information” on page 168.

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 169.

17. To save the record and return to the Individuals page, click **Save and Close**.

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

You can also use the Business button on the Bio 1 tab to add and share business address and relationship information.

Addresses on an individual record in Registrar’s Office are shared with the individual record in Admissions 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 more information about opening records, see “Finding and Opening Individual Records” on page 157.

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

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

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 e-mail 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 **Share?** 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 164.

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.
164 Chapter

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 178.

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 individual record are not made to the copy, or vice versa.

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.

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.

Copying and linking an address

Scenario: You recently added Ann Kelly as a parent in your database and did not add an address for her at the time. To ensure you enter the address correctly on Ms. Kelly’s individual record, copy the address from her daughter Cary’s record onto Ms. Kelly’s. You want to ensure when you change the address on either record, the change can be automatically updated on both, so also link the two addresses.

Note: While this procedure demonstrates copying and linking a student address to an individual, you can use it as a model for copying and linking addresses to other record types.
1. From Ann Kelly’s open individual record, select the Addresses tab. For more information about opening individual records, see “Finding and Opening Individual Records” on page 157.

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

3. To copy the address from Cary Kelly’s student record, click Copy Address From. The Open screen appears. Locate her 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 for Cary Alice Kelly screen appears.

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 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**.

**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 more information about opening records, see “Finding and Opening Individual Records” on page 157.
2. Select the address to unlink and click **Open**. The Address screen appears.

![Address Screen](image1)

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

![Shared Addresses Screen](image2)

**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**.

**Adding School Information**

By completing the **School Information** grid on an individual record, you can enter education information about an individual, including schools attended and degrees earned. If you convert an individual record, school information converts to the new student, faculty/staff, or applicant record. You can convert individuals to applicants only if you have **Admissions Office**. For more information about converting individual records, see “Converting Individual Records” on page 183.
Adding school information


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 Bio 1 tab, click OK.

Adding Demographic Information

Glossary: Demographics are the characteristics of human populations. In Registrar’s Office, you can follow the demographics of your student body 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

1. On the Bio 1 tab of an open individual record, click Demographics. The Demographic information screen appears. For more information about opening records, see “Finding and Opening Individual Records” on page 157.

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

Adding school information


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Adding school information


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 Bio 1 tab, click OK.
3. In the **Ethnicity** field, click the binoculars to access a Selected Ethnicities screen.

![Selected Ethnicities](image)

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 173.
Adding a business relationship using the Business button


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 161.

4. To copy and link an address click Copy Address From. For more information about copying and linking addresses, see “Copying and Linking Addresses” on page 164.

   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 Addresses” on page 166.

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 Registrar’s Office is shared with the individual record in Admissions 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.

   ![Photo Screen](image)

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

3. To size the photo to fit in the window, mark **Size to fit window**.

![Photo Screen with Scaled Image](image)

4. To save the photo and return to the individual record, 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 report 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 *Registrar’s Office, Admissions 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 a “Transcripts” Addr/Sal type that you use only on transcripts. For more information about adding addressee and salutation types, see “Adding an additional addressee/salutation” on page 172.

- **Assigning a primary addressee and salutation**
  1. From an open individual record, select the Addressees/Salutations tab. For more information about opening records, see “Finding and Opening Individual Records” on page 157.

**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 *Registrar’s Office, Admissions 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 additional addressee/salutation**
  1. From an open individual record, select the Addressees/Salutations tab. For more information about opening records, see “Finding and Opening Individual Records” on page 157.
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 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 students, faculty/staff members, or other individuals. If you have **Admissions Office**, you can also create personal relationships with applicants. For example, an individual can have children who are students and a spouse who is an individual or faculty/staff member.

You can 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 a student, the individual also appears as a relationship on the student’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 **Registrar’s Office** is shared with the individual record in **Admissions 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 more information about opening records, see “Finding and Opening Individual Records” on page 157.
2. In the **Show** field, select “Personal relationships”.
3. In the **Relationship** column, select how this person is related to the individual.
4. In the **Reciprocal Relationship** column, select how the individual is related to this person.
5. If the relation is an emergency contact for the individual, mark the checkbox in the **Emergency Contact** column.
6. If the individual is to receive the relation’s report cards, mark Receives Report Cards.

7. If the relation lives with the individual, mark Lives with Individual.

8. If the individual is to appear on the relation’s transcripts, mark Show on Transcripts.

9. 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 individual and relationship records are completed with the correct information. 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 Individuals page, click Save and Close.

Adding a business relationship

1. From an open individual record, select the Relationships tab. For more information about opening records, see “Finding and Opening Individual Records” on page 157.

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 organization 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 Michael Richard Andrews]

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

The Actions tab records any task to be completed for an individual. Actions, for example, can include a phone call to a parent or parent-teacher conference. 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 sends a reminder when the action is due. For example, if the guidance counselor needs to call to remind the parents their son needs to make up an exam he missed, 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 individual record, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 199.

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 more information about opening records, see “Finding and Opening Individual Records” on page 157.
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 **Action type** field, select the type of action to be taken, for example, “Meeting” or “Phone call”.

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

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

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

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

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

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

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

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

10. 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 Quick Letters for Individuals” on page 198.

**Note:** If you save a letter to an action, a **Word** icon appears in the status bar of the action record.
11. 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.

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

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

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

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 178.

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

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**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 Registrar’s 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 **Registrar’s 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 Registrar’s 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 Registrar’s Office**.
1. From an open individual record, select the Attributes tab. For more information about opening records, see “Finding and Opening Individual Records” on page 157.

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 from 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 a note, select the note from the grid and click **Open**.

1. From an open individual record, select the Notes tab. For more information about opening records, see “Finding and Opening Individual Records” on page 157.
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**

  1. From an open individual record, select the Media tab. For more information about opening records, see “Finding and Opening Individual Records” on page 157.

**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.

![Insert Object Screen]

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 type 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 from the window at the bottom of the New Media screen.

![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.

   ![Image of a media object 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 from the Media tab of the individual record.

   1. From an open individual record, select the Media tab. For more information about opening records, see “Finding and Opening Individual Records” on page 157.

   ![Image of a media object grid]

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

       ![Image of the Insert Object screen]

   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 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]

  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 *Administration Guide*.

For increased efficiency, you can convert individual records to student or faculty/staff records. If you have *Admissions Office*, you can convert individual records to applicant records. By converting individual records, you save time by avoiding the task of reentering biographical information and retaining relationships linked to the individual.

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 spouses 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 a student record, you can use it as a model for converting individuals to other record types.

1. From an open individual record, select **Individuals** from the menu bar. From the submenu, select **Convert, to Student**.
   A message appears asking if you are sure you want to change the record type. Click **Yes**. The New screen for the record type appears.
2. Review the information on the new record and confirm that it is correct.
3. If the new record type has additional required fields, you must complete these fields before you can save the record.
4. To save the new record and return to the Individuals page, click **Save and Close**.

Creating Letters from Individual Records

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 Registrar’s 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 Merged Letters for Individuals” on page 184.

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 Quick Letters for Individuals” on page 198.

You can select **Modify Letter Menu** to organize and edit saved letter formats. For more information, see “Organizing and Editing Letter Formats” on page 199.

When a letter is complete, you can save it as an action. For more information, see “Saving a Letter as an Action” on page 199.

Creating Merged Letters for Individuals

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.

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”.

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 “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.

![Image of Letter window]

A processing screen appears as the letter generates and then **Word** opens displaying the merged letter.

![Image of 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 199.

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

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

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.

   ![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 Conditional Word Merge”.

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

   ![New Individual Export](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**.

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.


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 Individual 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 Individual Letter screen.

21. To save and close the New Individual Letter screen, click OK.
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.

![Modify Letter Menu](image)

23. Click Search to access the Search Individual Letters screen.

![Search Individual Letters](image)
24. Select the letter to add and click **Open**. The Search Individual Letters screen closes and the new letter appears in the list.

25. Click **Close**. You return to the individual record.

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

---

**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 199.
A processing screen appears as the letter generates and then *Word* opens displaying the merged letter for the condition that matches the individual.

27. Click **Print**.

28. To close the letter and return to the individual record, click **Return to <Individual>**.

### Creating Quick Letters for Individuals

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”.

- **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.
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 199.
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 176.

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 Registrar’s 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.

The **Show these letters in the letter menu** box lists the individual letters selected to appear in the **Letter** menu.
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 Merged Letters for Individuals” on page 184.

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 200.

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.

![Export Screen](image)

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

![Word Document](image)

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 *Registrar’s Office*, you use organization records to store important information about other organizations affiliated with your school. 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 *Admissions Office* and *Student Billing*, these programs work with *Registrar’s 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 *Registrar’s Office* is also created or deleted in *Admissions 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 Registrar’s 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 several 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 Bishop, bishop, or BISHOP 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 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](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 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 a faculty 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 Registrar’s Office.
Adding an organization record


2. In the Name field, enter the name of the organization.

3. 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 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.

4. 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.

5. 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 Registrar’s Office.

6. In the Accreditation field, enter the organization’s accreditation.

7. In the Source field, enter how the organization became affiliated with your school.

8. In the Location field, enter the area the organization is located.

9. If the organization is a school or college, in the Marking system field, enter the marking system used by the organization.

10. If the organization is a school or college, in the GPA scale field, select the type of GPA scale used by the organization.

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.
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 209.

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 e-mail 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 Addresses” on page 212.

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 from the Organization tab or from the Addresses tab. When you add an address from the Organization tab, it automatically becomes the primary address for the record. When you add an address from 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 *Registrar’s Office* are shared with organization records in *Admissions 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 more information about opening records, see “Finding and Opening Organization Records” on page 205.

**Note:** You can also access the Address screen by clicking **Address** on the Organization 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 e-mail address.

   Note: In the contact grid, you can enter multiple contacts for the organization, 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 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 212.

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 “Managing Attributes and Notes” on page 219.

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 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**

  **Scenario:** You recently added Bishop John High School as an organization in your database and did not add an address for it at the time. You learn today that Alice Haynes, an alumna of your school, is the dean of students at Bishop John. To ensure you enter the address correctly on the school's organization record, copy the address from Mrs. Haynes’s record onto Bishop John High School’s record. You want to ensure when you change the address on either record, the change can be automatically updated on both, so also link the two addresses.

**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 Bishop John High School’s organization record, select the Addresses tab. For more information about opening records, see “Finding and Opening Organization Records” on page 205.
2. Select the organization address and click **Open** on the action bar. The Address for Bishop John High school screen appears.

![Address for Bishop John High School](image1)

3. To copy the address from Alice Haynes’s record, click **Copy Address From**. The Open screen appears. Locate her individual 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 for Mrs. Alice Haynes screen appears.

![Addresses for Mrs. Alice Haynes](image2)

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

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

5. To link the addresses, mark **Link these addresses**.
6. To copy Mrs. Haynes’s address onto Bishop John High School’s record, click **Copy Now**. You return to the Address for Bishop John High School screen, and the copied address information appears. The **Link?** column indicates contact types are linked.

![Address for Bishop John High School screenshot]

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 more information about opening records, see “Finding and Opening Organization Records” on page 205.
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.

![Shared Addresses Screen]

**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, students, or other organizations. If you have Admissions Office, you can also create relationships with applicants.
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 Registrar’s Office is shared with the organization record in Student Billing and Admissions 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 more information about opening records, see “Finding and Opening Organization Records” on page 205.

  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 or activity that needs to be completed for a record. Actions on an organization record, for example, can include verifying recommendations and soliciting donations. 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 registrar needs to call another school to check on transcripts, you can assign the phone call as an action. When the phone call is due, the program reminds you 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 Letters as Actions” on page 236.

Adding an action

**Note**: If another user already has the organization 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 organization record, select the Actions tab. For more information about opening records, see “Finding and Opening Organization Records” on page 205.

2. To add an action, click **New Action**. The New Action screen appears.

   **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”.

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

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

   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 Registrar’s 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 Quick Letters for Organizations” on page 236.

   **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 219.

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 Registrar’s 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 Registrar’s 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 Registrar’s Office.

- Adding an attribute
  1. From an open organization record, select the Attributes tab. For more information about opening records, see “Finding and Opening Organization Records” on page 205.
  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 from 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 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 a note, select the note in the grid and click Open.

  1. From an open organization record, select the Notes tab. For more information about opening records, see “Finding and Opening Organization Records” on page 205.
  2. On the action bar, click New Note. 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.
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 Letters

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 Registrar’s 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 Merged Letters for Organizations” on page 222.

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 Quick Letters for Organizations” on page 236.

You can select Modify Letter Menu to organize and edit saved letter formats. For more information, see “Organizing and Editing Letter Formats” on page 237.

When a letter is complete, you can save it as an action. For more information, see “Saving Letters as Actions” on page 236.

Creating Merged Letters for Organizations

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.
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 “Organization” 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 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**.

**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**.

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.

![Image of 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 Letters as Actions” on page 236.

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

![Image of New Organization Letter screen](image)

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.

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 “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**.

![Conditional Merge Document](image)

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.

![Example Letter](image)

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

![Search Organization Letters](image)

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

![Modify Letter Menu](image)

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 software interface](image)

**Note:** You can click **Save this document as an action** to save the letter as an action. For more information, see “Saving Letters as Actions” on page 236.

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

![Image of merged Word document](image)

27. Click **Print**.

28. To close the letter and return to the organization record, click **Return to <Organization>**.
Creating Quick Letters for Organizations

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 Letters as Actions” on page 236.
4. To close the letter and return to the organization record, click **Return to <Organization>**.

### Saving Letters as Actions

**Note:** You can also create action letters from the organization’s Action tab. For more information, see “Adding Actions” on page 217.

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 Registrar’s 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.

    ![Modify Letter Menu](image)

    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 Merged Letters for Organizations” on page 222.
    - 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 238.
    - 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.

  ![Modify Letter Menu](Image)

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

  ![Organization 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 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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Note: Visit our Web site at www.blackbaud.com for the latest documentation and information.

In *Registrar’s Office*, you use room records to maintain information about rooms and locations on your campus. Once you add a room record to the program, you can select it when scheduling rooms for classes and other meetings, including parent-teacher meetings, college recruiting visits, and other school-related events.

You can use room records to define a location for 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 a teacher to meet with a student, you can designate the room in which the meeting takes place.

**Glossary:** In *Registrar’s Office*, a class is a section of a course. Each course can have several classes. For example, “01” in “English 102-01” represents the first class section.

To determine when rooms are available for scheduling classes, you can create restrictions.

To help streamline your school processes, you can use features in *Registrar’s Office* with your scheduling system that are integrated with room records. By viewing the room’s schedule, you can see class meetings and teachers scheduled in the room, the time it is being used, and the number of students in the room.

### 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 *Registrar’s 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 from the list by clicking the room name.

### Finding and Opening Room 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 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.

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

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.

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. Once you add a room record, you can enter scheduling restrictions. After you create classes, you can view the room’s schedule and edit class information. For more information, see “Managing Scheduling Information” on page 246.
If your school does not use a room, you can mark it inactive. Inactive rooms do not appear in Scheduling, nor can you use them as offices, homerooms, or resources for courses. Marking a room inactive does not affect classes already scheduled in the room. For more information, see the Class Scheduling Tasks chapter of the Scheduling Guide.

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**
  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.
  6. To set a maximum capacity for the room, mark Maximum room capacity and enter a number of students. If you schedule more than one class in the room at the same time, the maximum capacity is the total for all classes.
  7. To set a target capacity for the room, mark Target room capacity and enter a number of students. If you schedule more than one class in the room at the same time, the target capacity is the total for all classes.
  8. To allow multiple classes to be held in the same room, mark Allow [ ] classes to be held in this room concurrently and enter the number of classes allowed in the room at the same time.
  9. To schedule only the homeroom teacher in the room, mark Schedule only schedule homeroom teachers in this room.

**Note:** Rather than deleting a record from your database, we recommend you make unused rooms inactive by marking This room is inactive. Inactive rooms do not appear in Scheduling, nor are they available as resources for courses, homerooms, or offices for faculty/staff.
10. To select the schools that can schedule meetings in the room, in the **Classes can be scheduled in this room for these schools** box, mark the checkbox for each school. This box appears only if multiple schools are defined in **Configuration**. For more information about schools, see the **Configuration Guide for Registrar’s Office**.

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

### Managing Scheduling Information

You can enter information on room records that can help make your scheduling tasks easier. For more information, see the Class Scheduling Tasks chapter of the **Scheduling Guide**. You can enter restrictions that include the days or times in which the room cannot be scheduled. On the Schedule tab, you can view a room’s schedule and edit class information.

### Adding Room Restrictions

**Glossary**: You define blocks within a pattern. In each block, you specify the individual meeting times that class meetings occur. When using **Generate Master Schedule**, the program uses the meeting times in a block to assign meeting times to classes.

On the Restrictions tab of room records, you can define scheduling restrictions for a room. By default, rooms are always available for scheduling. You can restrict room availability during certain days, periods, or blocks of time. For example, if there are drama rehearsals in the auditorium each day from 1:00 pm to 3:00 pm, you can restrict classes from being scheduled in the auditorium during those hours.
Adding room restrictions

1. From an open room record, select the Restrictions tab. For more information about opening records, see “Finding and Opening Room Records” on page 243.

2. In the School field, select the school for which to add restrictions for the room.
3. In the Academic year and Session fields, select the year and session for which to add restrictions.
4. To add a restriction to this room, select “Not available for scheduling during these days and times”.

   Warning: If you select “Always available for scheduling”, you cannot define restrictions based on the selected academic year.

5. In the Cycle Day column, select the cycle day the room is unavailable or “<All cycle days>”.
   - If you select a cycle day, proceed to step 6.
   - If you select “<All cycle days>”, proceed to step 8.

6. In the Restrict Availability By column, select “Period”, “Time”, or “Cycle Day”.
   - If you select “Period”, you can restrict the room for a period in the cycle day and proceed to step 7.
   - If you select “Time”, you can restrict the time of day in which the room is available and proceed to step 8.
   - If you select “Cycle Day”, you can restrict the room for the entire cycle day and proceed to step 9.

7. In the Unavailable Period column, select the period in which the room is unavailable and proceed to step 10.
8. In the **Unavailable From Time** and **Unavailable To Time** columns, enter the time the room is unavailable and proceed to step 9.

9. To add more restrictions, return to step 5 and repeat as needed. To continue without adding more restrictions, proceed to step 10.

10. To save the record and return to the Rooms page, click **Save and Close**.

## Copying Room Restrictions

To save time when adding rooms from year to the next, you can copy room restrictions. By copying room restrictions, you can ensure the restrictions remain consistent from year to year. Before adding a new room record, consider whether you can get a head start by copying information from a record already in the program.

- **Copying room restrictions**

  **Note:** To copy information from an existing record, open the record and select **Room, Copy Restrictions** from the menu bar.
1. On the Rooms page, click Copy Room Restrictions. The Copy Room Restrictions screen appears. For more information about opening room records, see “Finding and Opening Room Records” on page 243.

2. In the Room field, select the room for which to copy restrictions or select “<All Rooms>”.

3. In the Copy restrictions from frame, select the school, academic year, and session from which to copy room restrictions. The School field appears only if you have more than one active school.

4. In the Copy restrictions to frame, select the school, academic year, and session to which to copy room restrictions. The School field appears only if you have more than one active school.

5. To copy and save the restrictions, click OK. You return to the Rooms page.

Viewing Schedules

Glossary: In Registrar’s Office, a class is a section of a course. Each course can have several classes. For example, “01” in “English 102-01” represents the first class section.

On the Schedule tab you can view a room schedule for each academic year and session defined in Registrar’s Office. From this tab, you can open a class record and view or edit class information. For more information about scheduling, see the Class Scheduling Tasks chapter of the Scheduling Guide.

- Viewing a room schedule

  1. From an open room record, select the Schedule tab. For more information about opening records, see “Finding and Opening Room Records” on page 243.

  2. In the School field, select the school for to view the room’s schedule. This field appears only if you have defined multiple schools in Configuration.

  3. In the Academic year, Session, and Term fields, select the date range for which you want to see the room’s schedule.

  4. To view the schedule as a grid, mark Grid.
5. In the **Time interval** field, enter the amount of time that each block in the grid represents. For example, to see four blocks for each hour interval, enter “15”.

6. To view the schedule as a list, mark **List**.

7. To view all meetings of each class, in the **Show** field select “All meetings”.

8. To view only the first meeting of each selected class, in the Show field, select “First meeting only”.

9. 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 Registrar’s 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 *Registrar’s 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 Registrar’s Office*. 
Adding an attribute

1. From an open room record, select the Attributes tab. For more information about opening records, see “Finding and Opening Room Records” on page 243.

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 from 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 a room record. For more information about attributes, see the *Configuration Guide for Registrar’s Office*.
Courses

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In Registrar’s Office, course records store detailed information about courses offered by your school or transferred from another school.

You can define various restrictions to streamline the scheduling process, specify which faculty and rooms to consider resources, and establish rules with other courses for scheduling purposes.

On the course record, you also enter grading and billing information and store additional attributes and notes. You can quickly view students and classes for the course.

If you have Student Billing, information on the Billing tab is shared with Registrar’s Office so that if you make changes to the Billing tab in one program, the changes appear in the other program.

### Accessing Course Records

**Glossary:** A course is an area of study offered by a school. You can use course records to develop your schedule and define how classes will be created and graded each year. You can use course records to create course catalogs, report cards, and transcripts.

Because records are such an important part of Registrar’s 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 course records. To access courses, click Records on the navigation bar, and then click Courses. The Courses page appears.

Consider the Courses page the starting point for course records. From this page, you can add a new course or open an existing record. You can edit course record options by clicking Edit options for Courses. 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 Course by Course Name field. The Courses page lists recently accessed records. You can open a course in the list by clicking the course name.

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

When you click **Open a Course** on the Courses page, the Open screen for course records appears. The Open screen has filters you can use to narrow your search and quickly locate the course record you want to open. The search process is not case-sensitive, so you can enter Biology, biology, or BIOLOGY 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 course record**
  1. On the navigation bar, click **Records**. The Records page appears.
  2. Click **Courses**. The Courses page appears.
  3. Click **Open a Course**. The Open screen for course records appears.

4. In the **Find Courses that meet these criteria** frame, enter criteria to use to search for the course.
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 course record to open.

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

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

Adding Course Records

Course records are comprised of multiple tabs that store specific information about courses. On the Course tab of a course record, you can add general information that includes the course ID and name, description, and school that offers the course. You can also select the department and category to which the course can belong. To further define the course, you enter additional information on subsequent tabs, including scheduling restrictions, resources, rules, grading requirements, and billing information.
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 Registrar’s Office, you can create academic years for each school for which to schedule classes.

You can designate if a course will not be offered in a future year, and the course does not appear in subsequent academic years. For example, if English V is available in academic year 2006-2007, and you mark Course no longer offered, English V does not appear in academic years 2007-2008 and subsequent years. The course will not appear in Attendance, Scheduling, Grades, Query, or Reports for those academic years.

If you enter common values repeatedly for multiple course 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 course record by selecting Course, 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 course record

Before adding a course record, consider whether you can get a head start on the record by copying course information from a record already in the program. For more information, see “Copying a course from an existing course record” on page 260.

1. On the Courses page, click Add a New Course. The New Course screen appears.

2. In the Course ID and Course name fields, enter the course identification number and name. These must be unique within each school.

3. In the Description box, enter a description of the course. You can use this description in course catalogs. For more information, see the Course/Class Reports chapter of the Reports Guide for Registrar’s Office.

4. In the School field, select the school in which the course is offered. This field appears only if multiple schools are defined in Configuration. For more information about defining multiple schools, see the Configuration Guide for Registrar’s Office.

Tip: If you enter common values repeatedly for multiple courses, you can create a default set with these values to save time during data entry. On the menu bar, select Course, Load Defaults from.
5. In the Course category field, select “Standard”, “Transfer Course”, or “Mandatory”.
   - To use the course with student requests, scheduling, grading, and attendance, select “Standard”.

**Warning:** If you select “Transfer Course”, you cannot schedule the course. You can only enter grades for a transfer course.

   - If students took the course at another school, select “Transfer Course”. The Restrictions 1, Restrictions 2, Resources, Rules, Billing, Students, and Classes tabs do not appear on records for transfer courses.
   - To indicate the course is required of all students in a specific grade, select “Mandatory”. You can define the grade levels required to take the class on the Restrictions 1 tab.

**Note:** If a school stops offering a course, access the record and mark Course no longer offered. The course no longer appears in academic years where classes do not exist for this course.

The program automatically generates requests for mandatory courses in Scheduling and includes mandatory courses when considering term limits. You can set scheduling restrictions for mandatory courses, and enter grades and attendance. You cannot associate scheduling rules with mandatory courses. For more information, see the Course Requests chapter of the Scheduling Guide.

6. To assign the course to selected departments, in the filters grid, in the Include column for the Departments filter in the filters grid, choose “Selected”. For more information about using filters, see the Program Basics chapter of the Program Basics Guide.

The Selected Departments screen appears. Select a department name on the left and click the right arrow to move it into the Include these departments box on the right. The course appears as an offering in any of the departments you select.

7. When you finishing selecting departments, click OK. You return to the Course tab.

8. Course types are defined in Configuration, for example, Honors, AP, and Elective. To include the course in specific course types, in the filters grid, in the Include column for the Course Types filter, choose “Selected”.

The Selected Course Types screen appears. Select a course type on the left and click the right arrow to move it into the **Include these course types** box on the right. The course appears in other areas of the program as the types you select.

9. When you finishing selecting course types, click **OK**. You return to the Course tab.

10. To save the record and return to the Courses page, click **Save and Close**.

**Copying Course Records**

When you prepare for the next academic year, session, or both, consider whether you can save time in your process. From the Courses page, you can copy course information. From a course record, you can copy the course, restrictions information, or granding information.
Copying a course from an existing course record

To save time when adding records for a new academic year, you can copy course records. Before adding a course record, consider whether you can get a head start by copying a course from a record already in the program.

1. From an open course record, select Course, Copy Course. The Copy screen appears.

2. In the New course school field, select the school with which to associate the copied course. This field appears only if you have defined multiple schools in Configuration. For more information about defining schools, see the Configuration Guide for Registrar’s Office.

3. In the Information to copy box, mark the information from the current course record to copy to the new course record.

4. In the Academic years to copy box, mark the academic years to copy on the new course record. You must select at least one academic year if you are copying restrictions, grades, or skills.

5. To create the new record, click OK. The program creates and opens the new course record.

6. Enter the information for the new course in the Course ID and Course name fields.

7. Verify the existing information is correct. For more information, see “Adding Course Records” on page 256.

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

Note: Course ID and Course name must be unique within each school.
Copying course information from the Courses page

To maintain consistency from year to year, you can copy selected course information. Through **Copy Course Information** on the Courses page, you can copy all or selected courses and specific information from one academic year and session to another.

1. On the Courses page, click **Copy Course Information**. The Copy Course Information screen appears.

![Copy Course Information Screen]

2. In the **Copy course information for school** field, select the school in which to copy course information.

3. In the **Copy course information from** frame, select the academic year and session from which to copy course information.

4. In the **Copy course information to** frame, select the academic year and session to which to copy course information.

5. You can mark checkboxes to also copy restrictions and grading information to the new record. If you have **Student Billing**, you can also copy billing items.

6. To select specific courses and course information to copy, in the filters grid, in the **Include** column, choose “Selected”. For more information about using filters, see the Program Basics chapter of the **Program Basics Guide**.

**Warning:** We strongly recommend you make a backup of your database before copying course information. If you view the preprocessing report, you can make sure the information is accurate before you copy course information into your database.
7. When you finish making selections, click **Preprocessing**. A processing screen appears. Once processing is complete, the Copy Course Information Preprocessing preview report appears.

8. When you finish viewing the preprocessing report, close the screen.

9. To copy course information, click **Copy now**. A processing screen appears.

10. The Copy Course Information report appears.

11. Close the report. You return to the Copy Course Information screen.

12. To save the record and return to the Courses page, click **Save and Close**.
Copying restrictions information on the course record

To save time when adding records, you can copy course restrictions from one academic year and session to another academic year and session. By copying course restrictions, you can ensure the restrictions remain consistent from year to year.

1. From an open course record, Restrictions 2 tab, select the academic year you want to copy from. Click Copy. The Restrictions for <course name> screen appears.

2. In the Academic year and Session fields, select the academic year and session for which you to copy course restrictions.

   Warning: You can only copy course restrictions from one session to another if they use the same timetable.

3. In the Length in terms [ ] starting in terms field, enter the number of terms the course spans and mark the terms in which the course can start. For example, a math course may last two terms and always start in the Fall term.

4. If students do not have to request all terms of the course, mark Allow partial requests.

5. To track class attendance for the course, mark Track class attendance. If you mark this checkbox, classes created from the course appear in Attendance.

6. In the Restrict by field, select “Pattern” and the pattern by which to restrict classes or select “Meeting” and enter the Number of Meetings and the Length in Minutes.

7. If you selected “Pattern”, in the Number of meetings field, select “Use Pattern values” or “Specific value”.
   • If you select “Use Pattern values”, the block used for scheduling determines the number of meetings to assign for classes.
   • If you select “Specific value”, enter a number in the field to specify how many meetings to assign to classes for each block.

8. To schedule all meetings of the course in the same classroom, mark Keep meetings in same room.

9. To schedule each class in a different block, mark Each class must use a different block.

10. In the Restricted Times grid, in the Restrict Availability By column, select “Day” or “Block”.
If you select “Day”, you can restrict classes from being scheduled on specified cycle days during specified times and proceed to step 12.

If you select “Block”, you can restrict classes from being scheduled during an entire block and proceed to step 11.

11. In the **Block** column, select the block in which the course is restricted and proceed to step 14.

12. In the **Day** column, select the cycle day in which to restrict meeting times.

13. In the **Unavailable From Time** and **Unavailable To Time** columns, enter the time of the cycle day the course cannot be scheduled.

14. To save the restrictions and return to the course record, click **OK**.

**Copying grading information on the course record**

To maintain consistency from year to year, you can copy grading information for a course. On the grading tab of a course record, you copy the grading information from one academic year and session to another.

1. From an open course record, Grading tab, select **Copy**. The Copy Grading Information screen appears.

2. Under **Copy from**, in the **Academic year** and **Session** fields, select the year and session to which the grading information copies from.
3. Under **Copy to**, in the **Academic year** and **Session** fields, select the year and session to which the grading information applies.

![Copy Grading Information](image)

4. To copy the grading information and return to the course record, click **OK**.

---

### Adding Scheduling Restrictions

**Note:** The Restrictions 1 and Restrictions 2 tabs do not appear on the course record if you selected “Transfer Course” in the **Course Category** field on the Course tab.

On the Restrictions 1 tab, you define general restrictions for the course, such as class size, number of classes per term, associated grade levels, and priority when scheduling.

On the Restrictions 2 tab, you define restrictions per academic year and session. You must define these restrictions to be able to schedule the course for the academic year and session. For example, you specify how many terms the course spans, the term the course starts, whether to allow partial requests, and whether to restrict the course by meetings or by pattern.

### Restricting Courses on the Restrictions 1 Tab

Restrictions you set on the Restrictions 1 tab are not specific to an academic year or session.

- **Setting general restrictions for courses**
  1. From an open course record, select the Restrictions 1 tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.

**Warning:** Minimum, target, and maximum numbers you enter in the grid determine how the program creates classes and schedules. For more information, see the Class Scheduling Tasks chapter of the *Scheduling Guide*.

2. In the **Class size** row, in the **Minimum** column, enter the fewest number of students that can be in a class.
3. In the **Class size** row, in the **Target** column, enter the ideal number of students per class.
4. In the **Class size** row, in the **Maximum** column, enter the greatest number of students that can be in a class.
5. In the **Classes per term** row, in the **Minimum** column, enter the fewest number of classes the course can have.
6. In the **Classes per term** row, in the **Target** column, enter the ideal number of classes the course should have.
7. In the **Classes per term** row, in the **Maximum** column, enter the greatest number of classes of the course that can be created.

8. In the **Grade levels allowed** box, mark checkboxes for each grade level students can be in to request the course.

**Note:** If you select “Mandatory” in the **Course category** field on the Course tab, **Course can be requested multiple times, Course gender, Default alternate, and Default request priority** do not appear on the Restrictions 1 tab.

9. If a course can be requested more than once, mark **Can be enrolled multiple times in the same session**. If you leave this checkbox unmarked, an exception will appear in *Scheduling* when a course has been requested already.

10. If your school is a coed school, to specify students who can request the course, in the **Course gender** field, select “Coed”, “Male”, or “Female”. If your school is single gender, this field does not appear.

11. To designate an alternate course if the program cannot enroll a student in this course, in the **Default alternate** field, click the binoculars and select an alternate course. This is a default only and can be changed later in *Scheduling*.

12. To select the scheduling priority of the course, in the **Default request priority** field, select “Low”, “Standard”, or “High”. The program uses this priority when processing course requests in *Scheduling*.

**Note:** If your school schedules this course manually, do not mark **Include course when generating a master schedule using a priority of [ ]**.

13. To include courses when generating a master schedule, mark **Include course when generating a master schedule using a priority of [ ]** and select “Low”, “Standard”, or “High”. The program uses this priority to assign meeting times, teachers, and rooms when creating the master schedule.

14. To include this course when generating student schedules, mark **Include course when generating student schedules**. The program uses this to enroll students in classes.

15. To save the record and return to the Courses page, click **Save and Close**.

### Restricting Courses on the Restrictions 2 Tab

Restrictions you set on the Restrictions 2 tab are specific to academic years and sessions. You define information about how to schedule the course, such as the length in terms and start terms and whether to allow partial requests. You also determine whether courses are restricted by pattern or by meeting.

On a restrictions record, you can also enter historical course names. For more information, see “Including Historical Course Names” on page 271.

If you mark **Course no longer offered** on the Course tab of a course record, you can no longer add restrictions to the course.

If you cannot see an academic year, check your Academic Year options for how many future and past years appear. Select **Tools, Options** from the menu bar and select **Academic Years** in the list on the left.

### Restricting Courses by Pattern

**Note:** Patterns are defined in Registrar Setup in *Configuration*. For more information about patterns, see the *Configuration Guide for Registrar’s Office*.

When restricting courses by pattern, you select how to calculate the number of meetings, whether meetings should be kept in the same room, and if each class must use a different block. You can also prevent meetings from being scheduled during certain times of a cycle day or during certain blocks.
Restricting a course by pattern

1. From an open course record, select the Restrictions 2 tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.

2. On the action bar, click New Restrictions. The Restrictions screen appears for the course.

3. In the Academic year and Session fields, select the academic year and session for which to add restrictions.

4. In the Length in terms [ ] starting in terms field, enter the number of terms the course spans and mark the terms in which the course can start. For example, an English course may last two terms and always start in the Fall term.

5. If students do not have to request all terms of the course, mark Allow partial requests.

6. To record class attendance for the course, mark Track class attendance. If you mark this checkbox, classes created from the course appear in Attendance.
7. To include a course name different from the current course name on the transcript, enter the course name in the Historical course name field. For more information, see “Including Historical Course Names” on page 271.

8. In the Restrict by field, select “Pattern” and the pattern by which to restrict classes.

9. In the Number of meetings field, select “Use Pattern values” or “Specific value”.

Glossary: You define blocks within a pattern. In each block, you specify the individual meeting times that class meetings occur. When generating the master schedule, the program uses the meeting times in a block to assign meeting times to classes.

- If you select “Use Pattern values”, the block used for scheduling determines the number of meetings to assign for classes.
- If you select “Specific value”, enter a number in the field to specify how many meetings to assign to classes for each block.

10. To schedule all meetings of the course in the same classroom, mark Keep meetings in same room.

11. To schedule each class in a different block, mark Each class must use a different block.

12. In the Restricted Times grid, in the Restrict Availability By column, select “Day” or “Block”.
   - If you select “Day”, you can restrict classes from being scheduled on specified cycle days during specified times and proceed to step 14.
   - If you select “Block”, you can restrict classes from being scheduled during an entire block and proceed to step 13.

13. In the Block column, select the block in which the course is restricted and proceed to step 16.

14. In the Day column, select the cycle day in which to restrict meeting times.

15. In the Unavailable From Time and Unavailable To Time columns, enter the time of the cycle day the course cannot be scheduled.

---

![Scheduling Example](image-url)
16. To save the restrictions and return to the course record, click **OK**. The new restrictions appear in the grid.

17. To save the record and return to the Courses page, click **Save and Close**.

**Restricting Courses by Meeting**

When restricting courses by meeting, you enter the number of meetings and the length of the meetings. You specify whether meetings should be kept in the same room. You can also prevent meetings from being scheduled during certain times of a cycle day.

- **Restricting a course by meeting**

  1. From an open course record, select the Restrictions 2 tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.

**Tip:** To copy restrictions already defined for a course, select an academic year in the grid from which to copy and click **Copy** on the action bar.
2. On the action bar, click **New Restrictions**. The Restrictions screen appears for the course.

![Restrictions for ENGL 301 - English III](image)

3. In the **Academic year** and **Session** fields, select the academic year and session for which to add restrictions.

4. In the **Length in terms [ ] starting in terms** field, enter the number of terms the course spans and mark the terms in which the course can start. For example, an English course may last two terms and always start in the Fall term.

5. If students do not have to request all terms of the course, mark **Allow partial requests**.

6. To record class attendance for the course, mark **Track class attendance**. If you mark this checkbox, classes created from the course appear in **Attendance**.

7. To include a course name different from the current course name on the transcript, enter the course name in the **Historical course name** field. For more information, see “Including Historical Course Names” on page 271.

8. In the **Restrict by** field, select “Meeting”.

9. To define the number of meetings and the length of each, in the grid, in the **Number of Meetings** column, enter the number of times the course meets.

   **Note:** Depending on the timetable defined in **Configuration**, this column may be the **Length in Periods** column. If so, enter the number of periods each class meeting lasts.

10. In the **Length in Minutes** column, enter the number of minutes each meeting lasts.

11. To schedule all meetings of the course in the same classroom, mark **Keep meetings in same room**.

12. In the **Restricted Times** grid, in the **Cycle Day** column, select the cycle day the room is unavailable or “<All cycle days>”.

   - If you select a cycle day, proceed to step 13.
   - If you select “<All cycle days>”, proceed to step 15.

13. In the **Restrict Availability By** column, select “Period”, “Time”, or “Cycle Day”.

   - To restrict the course for a certain period of the cycle day, select “Period” and proceed to step 14.
• To restrict the time of the cycle day in which the course is unavailable, select “Time” and proceed to step 15.
• To restrict the course for the entire cycle day, select “Cycle Day” and proceed to step 16.

14. In the **Unavailable Period** column, select the period in which the course is unavailable. Proceed to step 16.

15. In the **Unavailable From Time** and **Unavailable To Time** columns, enter the time the course is unavailable.

16. To save the restrictions and return to the course record, click **OK**. The new restrictions appear in the grid.

17. To save the record and return to the Courses page, click **Save and Close**.

**Including Historical Course Names**

If you update a course name, the name updates throughout the program. If you want to display a former course name on the transcript, you can enter a course name different from the current course name in the **Historical course name** field. The **Historical course name** field appears on the Grading tab, restrictions record. For example, a course named Computer Basics is now named Introduction to Computers. You still want Computer Basics to display on the transcripts for students who took the course while that was the course name.

When creating a transcript, you can select historical course name as a column in the course detail section.
Adding Resources

Note: For mandatory courses where a lot of teachers should be present, be sure to allow enough teachers as resources.

Resources include the teachers and rooms you can schedule for a course. You can designate the number of teachers to schedule per class, the priority of the available teachers, the number of classes each teacher can teach, and the rooms available either by room type or specific room. For more information about teachers’ records, see “Faculty/Staff” on page 95. For more information about room records, see “Rooms” on page 241.

Adding resources

1. From an open course record, select the Resources tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.

2. In the Number of teachers for each class field, select the number of teachers needed for each class. The number you enter determines how many teachers the program assigns to classes when generating the master schedule or when scheduling manually.

3. There are several ways to add teachers to the Available teachers grid. Teachers with the course already listed on their faculty/staff record appear automatically.
   - To select a teacher, click Add Faculty 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 can select more than one record at a time by holding down the CTRL key.
   - To add all teachers in the same department as the course, click Load Course Departments.
   - To select the departments from which to add teachers, click Load by Department.

4. In the Priority column, select “Low”, “Standard”, or “High”. This selection determines the ranking of the teacher for the course.
5. In the **Target # of Classes per Term** column, enter the number of classes of the course the teacher should be assigned.

6. In the **Maximum # of Classes per Term** column, enter the maximum number of classes of this course that you can assign to the teacher.

7. To include the homeroom assignments of the teachers as room resources, mark **Include homerooms of faculty specified as resources**.

8. In the **Available by** column, select “Type” or “Specific room.”
   - If you select “Type”, in the **Type** column, select the type of room to use for the course.

   **Note:** You can also add a room by clicking **Add Room** on the action bar.
   - If you select “Specific room”, in the **Room** column, click the binoculars to search for and select a room.

9. In the **Priority** column, select “Standard”, “Low”, or “High” for each room to be scheduled for this course.

10. To save the record and return to the Courses page, click **Save and Close**.

### Adding Course Rules

On the Rules tab, you can associate scheduling rules with courses. For example, you can have rules for corequisites, courses that cannot be taken concurrently, and courses paired across terms. Scheduling rules are defined in Registrar Setup in **Configuration**.

On the Rules tab, you can define prerequisites for the course. For example, for a calculus course, you can require completion of precalculus with at least a B grade earned. You can select multiple courses to meet a prerequisite with a single course. For example, you can specify that a student must have taken either Algebra I or Algebra I Honors before taking Algebra II.

The Rules tab does not appear for mandatory courses.

#### Adding a course rule

1. From an open course record, select the Rules tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.
2. In the **Course** column, click the binoculars and select the course to associate with the open course using a rule.

When you tab away from the **Course** column, the open course automatically appears in the second **Course** column.

**Note:** Scheduling rules are defined in *Configuration*.

3. In the **Rule** column, select the rule to associate with the courses.

4. In the **When to Use** column, select when to use the rule during scheduling.

**Note:** When generating master schedules and student schedules, you can select to override the selected setting in the **When to Use** column.

- If you select “Always” and the schedule cannot meet the rule, the program creates an exception and does not schedule the class.
- If you select “Ignore”, the program ignores the rule altogether.
- If you select “Try”, the schedule tries to meet the rule, creates an exception, and schedules the class.

5. In the **Reciprocate Rule?** column, mark the checkbox if the rule should also be added to the other course record.

- An example of using a reciprocated rule would be for Economics and American Government. On an Economics course record, you add a rule for the American Government course so the courses are taken in different terms but with the same teacher and at the same time of day. You want to reciprocate this rule so a rule for Economics also appears on the American Government course record.
- An example of a non-reciprocated rule would be when you are setting up rules for Biology I, Biology I Lab, Chemistry I, Chemistry I Lab, and want the Labs scheduled every other day and Study Halls on the days without Labs. On the Biology I Lab and Chemistry I Lab course records, add a non-reciprocated rule for Study Hall. In this way, you prevent the Study Hall course record from having rules with both Biology I Lab and Chemistry I Lab.

6. To save the record and return to the Courses page, click **Save and Close**.
Adding a prerequisite

1. From an open course record, select the Rules tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.

2. To add a prerequisite for the course, on the action bar, click **New Prerequisite**. The Open screen appears. Locate the course record of the prerequisite and click **Open**. For more information about using the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

3. The selected course appears in the **Courses** column of the prerequisites grid.

4. In the **Check For** column, select what the program checks for on the course.
   - If you select “Enrollment”, the program checks only for enrollment in the course.
   - If you select “Full credit awarded”, the program checks only for a full credit in the course.
   - If you select “Full credit awarded with Specific grade”, the program checks for full credit awarded and the grade you specify.

5. If you selected “Full credit awarded with Specific grade” in the **Check For** column, enter the minimum grade the student must have earned on the prerequisite course in the **Minimum Grade** column. In the **Marking Column** column, select the marking column in which the student must receive the grade.

6. The student must meet the criteria for each prerequisite row defined in the grid. For example, if a student must completed both Biology and Biology Lab with a specific grade before taking AP Biology, use a separate row for each course.
   However, you can define multiple course criteria for one row. For example, if a student must have earned in A in either Biology or Biology Lab before taking AP Biology, you can define this on one row using a multi-course prerequisite. For more information, see “Adding a multi-course prerequisite” on page 276.

7. To save the record and return to the Courses page, click **Save and Close**.
Adding a multi-course prerequisite

You can define a multi-course prerequisite for a prerequisite row.

1. From an open course record, select the Rules tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.

2. To add one of the prerequisites for the course, on the action bar, click New Prerequisite. The Open screen appears.

Locate the course record of the prerequisite and click Open. For more information about using the Open screen, see the Program Basics chapter of the Program Basics Guide.

3. The selected course appears in the Courses column of the prerequisites grid.

4. To add additional prerequisites to meet the one prerequisite for the course, select the row of the prerequisite you added and click Multi-Course Prerequisite on the action bar. The Multi-Course Prerequisite screen appears.

5. In the Students must satisfy [ ] of the specified courses field, enter the number of courses students must take out of the courses you select on this screen. For example, if you select two courses on this screen, you can specify that students have to satisfy the requirements for only one of these courses to meet the prerequisite.

6. In the Courses column in the grid, click the binoculars and select the courses.
7. In the **Check For** column, select what the program checks for on the course.
   - If you select “Enrollment”, the program checks only for enrollment in the course.
   - If you select “Full credit awarded”, the program checks only for a full credit in the course.
   - If you select “Full credit awarded with specific grade”, the program checks for full credit earned and the grade you specify.

8. If you selected “Full credit awarded with Specific grade” in the **Check For** column, enter the minimum grade the student must have earned on the prerequisite course in the **Minimum Grade** column. In the **Marking Column** column, select the marking column in which the student must receive the grade.

9. To save the multi-course prerequisite, click **OK**. You return to the Rules tab and the multi-course prerequisite appears in the grid.

10. To save the record and return to the Courses page, click **Save and Close**.
Adding Grading Information

Tip: Before adding grading information, consider whether you can save time by copying grading information from a course that already exists.

On the Grading tab, you can add grading information for the course, including the marking columns to use, how the program translates grades, and credits awarded. You can select to print the grading information on report cards and transcripts and whether to include the grade in calculations for performance and GPAs.

- Adding grading information
  1. From an open course record, select the Grading tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.
  2. If a student can earn credit when taking the course more than once, mark Course can be taken for credit multiple times.

Warning: If you mark Course is no longer offered on the Course tab, you cannot add new grading information.

3. To add grading information, click New Grading Information. The Grading Information screen appears.
4. In the **Academic year** and **Session** fields, select the year and session to which the grading information applies.

5. To print this course and grade on report cards and transcripts, in **Print this course on**, mark **Reports Cards** and **Transcripts**. In the priority field, enter the priority for the program to use when printing the course on report cards and transcripts.

**Note:** Performance categories and GPA calculations are defined in **Configuration**.

6. To include the course grade in performance categories, in the **Include this course in the following performance categories** box, mark the categories to include.

7. To include the course in GPA calculations, in the **GPA** column, select each GPA calculation type in which to include the course.

8. To give the course a greater value than other courses when calculating GPAs, in the **Weight** column, enter the value of the weight. For more information about weighting grades using either translation tables or this **Weight** column, see the **Configuration Guide for Registrar’s Office**.

9. To activate all marking columns ONLY when the course is added as an Other Course, mark **Allow historical entry for all marking columns available in the session**.
   
   This may be necessary when the marking columns selected for standard grade entry do not encompass all the marking columns used for the course an Other Course.

10. In the **Credits are awarded in** field, select “The same marking columns they are attempted” or “Different marking columns than they are attempted”.

**Note:** If you select “The same marking columns they are attempted”, you can enter attempted credits only in rows where the checkbox in the **Award Credit In** column is marked.

11. In the grid, in the **Graded** column, mark the checkbox for each marking column in which to award a grade for the course.

12. In the **Attempted Credits** column, enter the number of credits the course can earn.

13. In the **Award Credit In** column, mark the checkbox for the marking column in which students receive credit for the course.

**Tip:** In **Tools, Options**, you can select a default translation table to appear in the **Translation Table** column.

14. In the **Translation Table** column, select the translation table to use for translating grades.

15. To select the grade values the program can use for the course, in the **Values allowed** column, select “Grade”, “Numeric”, or “Both”.

**Warning:** Be aware that you cannot change the entry in the **Values allowed** column after grades for the course are entered.

- If you select “Grades”, the program uses grade values specified in the translation table.
- If you select “Numeric”, the program uses only numeric grades.
- If you select “Both”, the program uses both numeric and letter grades.
16. In the **Calculation** column, you can select a course average calculation to use for a marking column.

**Note:** Skills are defined in *Configuration*.

**Note:** To select individual skills, on the action bar, click **Load Skill**. You select skills on the Selected Skills screen.
17. To select skills associated with categories, on the action bar, click **Load Category**. The Selected Skill Categories screen appears.

18. Select a skill category on the left and click the right arrow to move it into the **Include these skill categories** box on the right.

19. When you finish making selections, click **OK**. You return to the Skills tab on the Grading information screen. The skills you selected appear in the grid. The program automatically completes the **Category** and **Ratings Table** columns for the selected skills.

20. Mark the checkboxes for each marking column in which skill ratings can be entered for the skill.

21. To save the grading information and return to the Grading tab, click **OK**.
Adding Billing Information

Note: For more information about setting up courses for Registrar’s Office and billing integration, see the 
Student Billing Configuration Guide.

On the Billing tab, you can add fees associated with a course. You can charge a flat fee per course or bill by 
the number of credits for a course. For example, if a course awards three credits and the billing fee is $20 per credit, 
the total billing amount for the course is $60.

If you have Student Billing, information on the Billing tab is shared between Student Billing and Registrar’s Office 
so if you make changes to the Billing tab in one program, the changes appear in the other program.

Because students are billed automatically for the fees assigned to a course, you should consider whether some 
expenses associated with the course should be billed separately and, therefore, not added on the Billing tab. For 
example, you can include textbooks on student schedules so that parents and students know which books are 
required for each course. If you want students billed for textbooks when they are billed for the courses, include 
the textbook fees on the Billing tab. However, if students buy their textbooks later at the bookstore, do not 
include the textbook fees on the Billing tab. You can enter the required textbooks as attributes on the Attributes 
tab if you need them to display on the schedule.

- Adding billing information
  1. From an open course record, select the Billing tab.

  2. In the Academic Year field, select the academic year you want to define course fees for.
  3. In the Session field, select the session you want to define course fees for.
  4. In the Fee Description column, select the description of the fee. Fees are defined in the Fee table in 
     Configuration. For more information about defining tables, see the Configuration Guide for Registrar’s 
     Office.
  5. In the Fee Type column, select “Fixed Amount” or “Amount per Credit”.
     • If you select “Fixed Amount”, a fixed fee is charged for the course regardless of the credits.
If you select “Amount per Credit”, the program multiplies the number of credits for the course by the amount to determine a total billing amount.

6. In the **Amount** column, enter the amount of the fee.

![Image of CHEM AP - AP Chemistry course with columns for Fee Type, Amount, and Billing Item with specific entries shown.]

**Warning:** If you use different transaction dates when you generate transactions or when you recalculate students, it may be possible for the system to find different billing items. We suggest you review the transaction date and how you set up the billing item to ensure consistent billing.

7. In the **Billing Item** column, select the billing item ID. The options available depend on the fee type you chose in step 5. The ID and not the specific billing item is used which enables you to copy record information from year to year.

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

**Adding Attributes and Notes**

The Attributes/Notes tab stores additional information about a course. You can use attributes to define specialized information for records, such as information you want to enter, but for which no field exists. You can filter attributes to use in other areas of *Registrar's Office*, such as *Query* and *Reports*.

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

You can also add free-form notes to this tab.
Adding an attribute and a note

1. From an open course record, select the Attributes/Notes tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.

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

3. In the **Description** column, enter or select the description for the attribute.
   - If you selected a table type attribute that uses short descriptions, in the **Short Description** column, select the attribute description. The **Description** column completes automatically.

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

5. If this attribute type is required on a course record, the program automatically marks the checkbox in the **Required** column. You cannot edit this from 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.

**Warning:** You must define attribute types in *Configuration* before you can add them to a course record. For more information about defining attributes, see the *Configuration Guide for Registrar’s Office*. 
7. To add additional information about the course, enter free-form text in the Notes box.

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

Viewing Students

On the Students tab of a course record, you can view students who are enrolled or who have requested the course. You can select and open a student record from the Students tab. For more information about student records, see “Accessing Student Records” on page 2.

Students who enrolled in a course and then withdrew appear in the list; however, students with the course graded as an Other Course do not. For more information about grades, see the Grades and Skills Guide.

Viewing students from a course record

1. From an open course record, select the Students tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.

   Note: If you select a specific session, you can select a term.

2. In the fields above the grid, select a year and session for which to view students.

   Note: To open a student record, select the student in the grid, right-click, and select Open.
3. To view both students with requests and students enrolled, in the Show field, select <All Students>”. If a student’s request is fulfilled, class information appears in the Class column.

4. To view only students with requests, select “Students with requests” in the Show field.

5. To view only students enrolled in the course for the selected academic year, session, and term, select “Students that are enrolled” in the Show field.

6. When you finish viewing, click Save and Close. You return to the Courses page.

Viewing Classes

**Glossary:** In Registrar’s Office, a class is a section of a course. Each course can have several classes. For example, “01” in “English-01” represents the first class section.

On the Classes tab, you can view classes for each academic year and session in which the course is scheduled. You can view class information in a list or a grid and open the class record to see full details. If no classes are scheduled for the course, the Classes tab does not appear.

For more information about class scheduling, see the Class Scheduling chapter of the Scheduling Guide.

- **Viewing classes**
  1. From an open course record, select the Classes tab. For more information about opening records, see “Finding and Opening Course Records” on page 255.
  2. In the Academic year, Session, and Term fields, select a year, session, and term for which to view classes.

**Note:** To view details about the class, select a class and click Open Class on the action bar.
3. To view the class meetings in a grid, mark \textbf{Grid} on the action bar.

![Diagram of grid view](image)

4. In the \textbf{Time interval} field, select the number of minutes represented on the grid within each hour.

5. To view the class meetings in a list, mark \textbf{List} on the action bar.

![Diagram of list view](image)

6. To view all scheduled meetings in each cycle, in the \textbf{Show} field, select “\textless All meetings\textgreater ”.
7. To view only the first meeting in each cycle, in the **Show** field, select “<First meeting only>”.

8. When you finish viewing, click **Save and Close**. You return to the Courses page.
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