AS3 MANUAL

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Introduction

AS3 is a powerful school administrative software system. It includes most of the features of its predecessors, AS2 and AS1 in addition to many new features. During its design, the primary focus was 'ease of use' coupled with features that enable the user to perform the daily tasks of school administration efficiently.

How to use this manual

1. Glance over the manual prior to using the software.

2. Discuss and decide on what codes will be used in defining support files.

3. Populate the support files in the sequence suggested.

4. Run a student through the system from start to finish (prospect through alumni).

5. As you migrate through the software modules, document, in this manual or elsewhere, how you will utilize the many options available to you.

Quick Start Manual

Appendix C contains a Quick Start Manual. These are steps you can follow with a test student which will help you develop the overall concepts of how the elements of the database function together as a unit. At the end of the tutorial, you will learn how to archive, restore, and finally purge your test student.

Decide on standards

Are you using upper case only, or a mixture of upper and lower case? All upper case is easier for data entry; however, the appearance of something like a transcript will not be as professional as a mixture of upper and lower case.

What will be used for the Student ID? Social Security Number or a simple sequential number? In some states, you are not permitted to use the social security number as the student's identification number.

In smaller schools, a form of the student's name can be used as the Student ID. One scheme for this concept might be as follows: the first seven letters of the last name followed by the first initial, leaving the last character for duplications. In the event of a duplication, add a 1, 2, 3, etc. at the end of the ID number. Following are some examples:

> SMARTM   Maxwell Smart
>
> SMITHH   Harry Smith
>
> SMITHM   Mark Smith
>
> SMITHM1 Marvin Smith
>
> SPRINGEJ James Springer

The system can generate a sequential student number by using the **F3** key in the Student ID field. The next available number is controlled by the Sequence Numbers File found in the Set-Up Support Files of the Accounts Receivable module.

Note that pressing **F7** in the Student ID field will tell you the last student number in the Student Database.

Keyed Fields

Each data file (table) contains a "key." A key is one or more data elements that make a data record unique among other records in the same data file. In most cases, the key to a data file contains only one data element, for example the Student ID is the key in a student record. There cannot be more than one record in a file with the same key.

An example of a multiple keyed file is the Academic Records File. This file uses the following four data elements to comprise the key: Student ID, Term, Course, and Section. Note that a keyed field has a dash following the number on the screen.

For example, the Course Section File has three keyed fields and those first three fields will have a dash following the field number on the screen:

> 1-Term
>
> 2-Course
>
> 3-Section

The following standards are important and are highly suggested:

Use only upper-case letters for keyed fields. For example, in your Course File, the course codes will be all upper case; this will make input such as Schedule Entry much easier in that the operator need not keep shifting. The course descriptions should be upper and lower case.

Do not leave spaces in keyed fields. This is confusing when trying to retrieve records, for example, is it one space or two spaces?

Avoid using special characters such as question marks (?), dashes (-), and slashes (/) in keyed fields; sometimes these characters will spark certain actions.

Support Files

Support files are data tables that are used to define codes you will use during various data entry functions. For example, a course your institution offers must have a code that will be used when you schedule a student for that class. For example, ENG101 might be used for your first level of English and ENG201 might be Advanced English.

Spend some time discussing what codes you will use in defining your support files. The codes you select will become part of historical transactions and cannot easily be changed; although you can begin to use new and different codes for the future.

The order in which you input your support files is important. Some data tables require the presence of an entry in a related table, thus you will find it easier to enter the support files in the suggested order.

This manual includes the support files for each software module. The lists are sequenced to eliminate the situation whereas a file cannot be input because a code in another file is not present. The support files for the software modules should be populated in the following order:

1. Prospect Tracking

2. Book Sales

3. Student Records

4. Instructor Grades

5. Accounts Receivable

6. Financial Aid

7. Career Services

8. Library

9. Document Tracking

10. Housing

11. Default Management

12. Customers

> Note that although you might decide to not utilize a software module, it is possible a support file in one module is required by another module. For example, you might choose to not use the Prospect Tracking software; however, the Student Records system requires the Admin Rep File to be populated (and the Rep table is in the Prospect Tracking module).

Refer to Appendix A: Order of Data Files Population. For each software module, a list of the tables is presented with an indication as to whether or not you must populate each file. Note that the tables for Book Sales are included within the Student Records module.

Data Entry Hints

Logging In

When you launch AS3, you will be asked for an operator code. The operator code is AS3. Later, you will add operator codes and optional passwords for each of your users. Refrain from logging into AS3 more than once using the same operator code; otherwise, you might run into conflicts when running many of the AS3 programs (the names of temporary work files often include your operator code). After the operator codes have been input for all users, the system administrator should add a password to the AS3 operator code to prevent individuals from using it.

Graphical Presentation

From the initial menu, press 'V' and **ENTER** to turn on graphical mode; otherwise, you operate in character mode. Your System Administrator can control if you begin your session in graphical or character mode. The default is set for graphical mode.

Logging Out of AS3

From the first menu, choose 'L' and **ENTER** to log off, or double click on Log Off.

Menus

You can press the first letter of an item on a menu to move the cursor to that menu item; or, if in graphical mode, you can double click on a choice. You can use the arrow keys to move up and down through a menu. The Home, Page Up, and Page Down keys will also help you navigate on menus. **F4** or clicking on X will return you to your previous menu. The **F6** key will provide help for the menu item on which you are stationed.

Hot Key

Your hot key is CONTROL/P. Holding down the CTRL key and pressing 'P' will bring up a special menu. This menu will enable you to enter notes for students, candidates, or prospects. You can send mail to other AS3 users using the Hot Key. It is also the entry point for creating a Selection File. Note that the Workstation Manager must be running for the hot key to work in graphical mode; see System Administrator to learn how to set up the Workstation Manager.

Mail

Another use for the Hot Key is for AS3 users to send mail to other AS3 users.

Mark each recipient by pressing **ENTER** when positioned on his or her name. After you have chosen who will receive the mail, press **F4** to write your mail.

When done writing your message, press **F4** and respond 'Y' if OK to send.

The recipients of your mail will receive it when they log in; or if they are already logged in, they will get the message when they move to a menu other than the one they are on.

A recipient has the option to retain the mail, print the mail, or delete it.

Selection File

A Selection File is a mini database of student numbers, prospect codes, candidate codes, or alumni. Each operator in AS3 can maintain up to 99 selection files. A selection file can be used as the source of input for many reports and processing functions. For example, instead of running statements or transcripts for all or a range of students, you can create a selection file for a group of students and run the report for only those students.

Although in most instances you will create a selection file manually by entering the ID numbers, in some cases, the software will create the selection file for you. For example, the Consecutive Days Report in the attendance module will offer an opportunity to have a selection file created with the output of the report. You can also build a selection file from the Student Records/Data Entry Menu or the Data Entry Menu under Accounts Receivable, taking advantage of many criteria.

When the system builds a selection file for you, the number of the selection file will always be 99. After it is built as file 99, you can copy it to another number to preserve it since the system will use 99 again when you build the file using a report.

Look-Ups

Many data elements permit use of **F2** to open the related support file. A list of data elements from that file will appear. You can populate the data field upon which your cursor is stationed by pressing **ENTER** on the selected row. When using the mouse, you can right-click and choose Look-Up rather than pressing the **F2** key.

While in the lookup support file, you have an option to press **F10** to GO TO a specified line; you will be asked for the GO TO information.

When doing a look-up, it helps to enter part of the field prior to pressing **F2**. For example, if looking up a student named Maxwell Smart, enter 'sm' followed by **F2** and you will be close or exactly on that student ready for retrieval.

When looking up students, you can follow the **F2** lookup with **F5**. This will provide other means of searching the student database; for example, you could then search by social security number by using the **F10** key.

Views

You can retrieve an entire record by entering the first data field of your initial screen and pressing **F9** (instead of **ENTER**) to view records in the file. Records in a view are presented horizontally with one data record in each row. After placing the cursor on the desired record (row), press **F9** again to retrieve the record.

While in a view, use **F10** to GOTO a specific record. The **F10** command box will allow you to specify the key of the record for which you are searching. A view can thus help you determine if an individual has multiple records in the same file.

If the view permits, you can change data in the matrix elements. To delete an entire record, press shift/delete on that row (on some keyboards, you might need to press CONTROL/D).

Cursor Control Keys

When performing data entry, you can navigate more efficiently if you learn to utilize the powers assigned to the cursor control keys:

> **Home** - Move left and right within a data field.
>
> **PageUp/PageDown** - Move up and down in the record by page.
>
> **UpArrow/DownArrow** - Move up and down through the fields. In the first field of a file, you can retrieve the next (previous) record in the file.
>
> **ENTER** - Move down through a data field. In the case of a date, the current date will often be selected. When inputting data in a field, you *must* press **ENTER** to conclude the entry.
>
> **TAB** - Tab to the right in a data field.

Function Keys

Function keys provide shortcuts to complete a task more efficiently.

F1 - Often means Yes.

F2 - Often means No. Used for support file Look-Up's.

F3 - Often means print the screen.

F4 - Often means End.

F5 - Sometimes means ALL. Used to convert a prospect.

F6 - Help (at a menu item or in a data field element).

F9 **-** Switch from single record maintenance to a view (multi-record).

Once in a view, use **F9** to retrieve the record upon which the cursor is resting (otherwise, use **F4** to end and cancel the view).

F10 - Often means GO TO.

ALT/PRINT SCREEN – When AS3 is running on a Windows platform this dual keystroke will copy the screen; you can then paste that screen in some other product such as WORD.

Term Codes

The codes you choose to define a term must be given consideration. They must be designed to be in sequential order related to calendar time. The term code is eight characters long and can thus contain a date if that is necessary.

For a semester or quarter based school, a three-character term code will usually work fine. For example:

001 - Winter 2000

002 - Spring 2000

003 - Summer 2000

004 - Fall 2000

011 - Winter 2001

However, if your term codes reach back into the 1900's and you use 99 as the year, the term codes would not be in the proper sequence since 99 would sort after 00. In this case, you might want to use a system such as the following:

> 994 - Fall 1999
>
> A01 - Winter 2000
>
> A02 - Spring 2000
>
> A03 - Summer 2000
>
> A04 - Fall 2000
>
> A11 - Winter 2001

Note that the letter A sorts after the number 9.

Of course, you can use more characters than three, but keep in mind that this requires more effort on the data entry individuals. For example, a longer setup might be as follows:

> 1999D - Fall 1999
>
> 2000A - Winter 2000
>
> 2000B - Spring 2000
>
> 2000C - Summer 2000
>
> 2000D - Fall 2000
>
> 2001A - Winter 2001

In the term code, always put the year first; don't put the semester ahead of the year or your terms will be sorted first by semester and then by year. The transcript will not be chronological. Here is an example of **bad** term code planning:

> F00 - Fall 2000
>
> F01 - Fall 2001
>
> S00 - Spring 2000
>
> S01 - Spring 2001

For schools with many start dates that do not run on quarters or semesters, the full date might be required to insure your term codes run in order:

> 19991215 - December 15, 1999 start
>
> 20000102 - January 2, 2000 start
>
> 20000204 - February 4, 2000 start

Transfer Entry Term Codes. Most schools prefer courses taken at another institution to appear at the beginning of the transcript. Since the asterisk (*) sorts prior to letters and numbers, it is suggested you use three asterisks as the term code for transfers. This will result in all courses transferred from other schools to appear first on the transcript as a group. The name of the group will depend upon what you use as a term code description in the Term File. For example, the record in the Term File might look like the following (this is already set up for you):

> 1-Term Code   ***
>
> 2 Start Date
>
> 3 End Date
>
> 4 Description   Transfer

Finally, do not use lower case letters in your term codes. This will cause problems in some software modules where sorting of data has to be case-insensitive (this means that lower- and uppercase letters are treated equally).

Prospect Tracking

The purpose of this module is to allow you to track prospective students from the moment they contact you until they enroll as a student. Unlike less robust systems, the AS3 software continues to track information within the prospect module as an individual moves through the life cycle of the student; thus, preserving data for you regarding the long-term history of each lead; for example, you will know which prospects graduated, dropped, were placed, etc.

A tickle-date system brings prospects to the attention of the admin reps at the designated time. The system generates letters and labels for selected groups of leads, and provides the reports management requires to make critical advertising decisions.

Software is included to allow you to track a rep's contact with high schools, including phone calls and visits. The database includes tables to retain key contacts at each school.

Data Entry

Prospect Entry

From the Prospect/Data Entry menu, choose Prospect Entry. Place the letter 'N' in the first field and the system will generate a prospect code for you. Continue by inputting the data elements you wish to track.

If a date and time are placed in the interview fields, the interview will be automatically posted to the interview file. The Prospect Comment will appear on the Interview Schedules when printed.

Note that some fields are system-generated and cannot be input when in add mode (e.g., Enrolled Date, Status, etc.).

The following prospect status codes are used by the system and are posted automatically:

> I = Interview scheduled (add a prospect with an interview date).
>
> T = Aptitude Test taken (add a record to the Aptitude Test File).
>
> P = Aptitude Test passed (include a passing score in Aptitude Test File). Passing scores are entered in the Major File in Student Records and the Set-Up Options in Prospect Tracking / Support Files. To pass the test, the score is matched against the latter, not the Major File. If the score does not equal or exceed that which is found in the Major File, you will receive a warning when enrolling your student.
>
> E = Enrolled.

Refer to the Document Tracking module for a means of posting additional status codes to prospects automatically.

Enrollment Forms

This data element on the Prospect Data Entry screen will respond with an Enrollment Forms screen if you press the **F3** key when at this field. On the Enrollment Forms screen you can track the status for various forms which you must define. Your system administrator must define

the fields to be tracked.

Aptitude Test Entry

This data file can optionally be used to track administrative tests taken by prospects. Unlike the similar file in the Student Records module, you track Prospect IDs in this file, not Student IDs. The file is typically used for admissions exams.

If you place a minimum score in the Major File for a given major, the system will check both the Prospect Aptitude Test File and the Student Test File for a Total Score that is equal to or greater than that found in the Major File for the student's major. You will receive a warning if the test score is too low.

When entering a record in this file, the Total Score will automatically be calculated as the sum of scores one, two, and three. If you need to track only one score, place it in Score 1 and when you pass by the Total Score data element, it will pick up the entry you made in Score 1 as the Total Score.

When you make an entry for an individual, the prospect will be assigned a status of 'T' for 'test taken.' When the prospect receives a passing score, a status of 'P' will be assigned. A score is considered 'passing' if it matches or exceeds the score found in the Set-Up Options of Prospect Tracking.

Any test records entered will be copied to the Test Entry File in the Student Records Module if and when the prospect enrolls.

High Schools

In this sub-menu, you can identify high schools, the contact individuals at those schools, and when contacts and visits were made. The types of contacts you wish to track (e.g., Vice Principals, Guidance Counselors, etc.) must be defined in the Personnel File on the High Schools Menu.

Status Entry/Edit

You can manually change a prospect's status by adding a record using this function on the Data Entry menu of Prospect Tracking. Although the status code in the Prospect Entry screen will be changed, prior status records will be retained by the system and can be viewed on the Inquiry Menu using the Prospect Status Records program.

Tickle Date Entry

This entry screen enables a rep to manage the tickle dates of his or her leads. Enrolled prospects will never appear on the tickle list. Leads will be listed in tickle date order, with individuals that have no tickle date appearing first. It is good practice to never allow a prospect's tickle date to become older than the current date; the rep should call these individuals and do one of the following: enroll the prospect, set a new tickle date, or request that the lead be archived from the system.

An option exists to have the Tickle Date posted automatically. Under Set-Up Options in the Prospect / Support Files you can tell the system to create a tickle date that is 'x' number of days beyond the lead date, or to make it the same as the interview date.

Notes Entry

Prospect notes can be entered using this selection. Notes that you enter are printed on the Rep Tickle Report. You can also reach this Notes Entry program by using your hot key (usually CTRL/P).

Source Codes

(Support Files/Set-Up Support Files)

Thought should be given to the design of the codes you will use for linking a lead to an advertisement. When you input a new prospect, you will want to ask the individual where he heard of your school. Examples are as follows:

> Newspaper Ad
>
> TV Commercial
>
> Friend
>
> Walk-In (just walked in off the street!)
>
> Radio
>
> Yellow Pages

If the lead tells you he saw you in the NY Times, you will want a source code that identifies the New York Times and the time frame in which he saw the ad.

If you have a monthly budget for the Times, you might have 12 records per year in your Source Code File (one for each month) just for the NY Times.. Divide the annual budget by 12 and place that amount in the COST field of the 12 source code records, or input 12 different amounts in the 12 monthly source code records if you desire to be more exact about your monthly cost.

The code you use for the source code record (field one, Source Code) should first identify the NY Times, then the year and month. For example, the source code representing advertising for December of 2009 in the NY Times might be:

NT0912

When the lead tells the telemarketing person he saw your school in the Times, the data entry operator can enter NT0212 easily for the source code. If only NT02 is input by the operator, a window will open with the cursor positioned at the first NT02 record; then the operator could easily select the ad for the correct month.

The length of the source code field is long enough that you can make your advertisements specific to a given date rather than a year, month, or week.

A yellow page ad might have one record per year and be coded Y09 for Yellow Pages, 2009.

Correspondence

Build Correspondence File

From the correspondence menu, choose Build Correspondence. With the options presented, populate those that will enable the software to find the lead(s) you desire. When it completes, you are ready to print mailing labels and letters.

If your task is to generate a letter for prospects, be sure you have specified the name of the letter you are sending in the Letter ID field.

If you choose to clear previous entries in the Correspondence File, the file will be erased and will include only your new entries; otherwise, if you respond with 'N' for 'do not clear,' then you will be adding new entries to those written during the last execution of the Build program.

Note that once a prospect has an enrolled date, he or she will be skipped whenever you build the correspondence file even if the parameters you chose would include him. To add such a prospect to a mailing, you would have to use the Edit Correspondence File and use the ADD mode.

With this function, you can also build a correspondence file for high schools instead of prospects. You would do this by placing an 'H' in the Process By prompt.

Edit Correspondence

The edit feature enables you to modify records created by the Build Correspondence program. You can add, modify, or delete records in this temporary file used for producing correspondence.

List Correspondence File

This report prints records you have created in the Correspondence File. The listing is useful for making corrections prior to printing labels or letters.

Labels

The labels program is designed to run on a laser type printer using labels three-across. The label type is 5160.

Letters

The letters program is designed to print from a laser printer using letterhead paper.

From the Prospect/Correspondence menu, select Enter Letters. Only the body of the letter is input followed by the signature information. When you print the letter, the date and name and address of the lead will be added for you. If you have a name in the 'nickname' data field, it is used after the word 'Dear', otherwise, the full name of the individual is used such as Dear John Doe.

Next, you will build the Correspondence File, placing the code of the letter on that screen in the Letter ID field. All prospects selected by the 'build' function will receive the letter when you run the Print Letters program.

Send Email

This function sends email to individuals who have a record present in the Correspondence File.

Prior to running this program, you must build the Correspondence File using the related program found on the Correspondence Menu.

When you build the Correspondence File, you must specify the code of the letter that is to be sent; the email text is created using the Letters Entry program on the Correspondence Menu (same as creating a letter). The letter description field will become the subject of the email.

This feature is only functional on Windows-based systems. It uses the 'blat' software interface to send your emails. Blat must be installed prior to your use of this feature. In addition, you must have access to an SMTP server via TCP/IP.

Often, depending upon your internet connection, sending too many emails at one time will not work properly. When you run the Send Email program, you can limit the number of emails to be transmitted by placing a number in the Batch Limit field. For example, if you find your system can only process 20 emails at a time, place 20 in the Batch Limit field. Then, when you re-run the Send Mail program, the first 20 will be skipped over and the next 20 will be transmitted.

Pending Letters

You can set the computer to determine when letters you create are to be generated. This is accomplished through the use of the following functions:

Letter Group File

This file is used to link several letters together for the purpose of mailings (or emails) to be printed at a specified time.

A group can contain one or more letters. The letters must be defined using the Enter Letters program.

Although many groups can be created, only one group can be active at any given time. The active group is declared in the setup options of Prospect Tracking on the Support Files menu.

Build Letters Pending

When you run this program, the setup options in Prospect Tracking are inspected to get the Letter Group to be processed.

Then the Letter Group File is examined to get the letters to be generated. The dates that those letters are to be released are calculated based on the Date Type and Days fields found in the Letter Group File.

The letters to be generated are placed in the Letters Pending File. When you run the Build Correspondence File and specify 'Y' to Pending Letters, the letters will be prepared for the Print Letters program (or email).

Letters Pending File

This file retains letters ready to be printed. Records are written to this file by the Build Pending Letters program.

Run the Build Correspondence File program and respond 'Y' to Pending Letters to create letters in the Correspondence File for entries found here in the Letters Pending File.

After the letters have been processed by the Build Correspondence File, the Printed flag will be set to 'Y' so they won't generate a second time. Thus, it is important to print the letters immediately after running the Build process so a future Build process doesn't erase your entries in the Correspondence File; if this were to happen, you would have to clear the Printed flags in this file so the records could be generated again.

You can now print your letters, emails, and/or labels!

Reports

On the Prospect/Reports menu, you can experiment with the various reports available.

Birthday Report

This report enables you to choose a month and print a report of leads having a birthday during that month. You can choose to build a Selection File, which then gives you the power to build a Correspondence File for those individuals. With the Correspondence File you can send letters, print labels, and/or send emails.

Do Not Call List

This listing will report prospects who have their Best Time To Call flag set to 'N' (for Do Not Call). Prospects who have an enrollment date are skipped and, thus, not included.

The report will print in Rep Code order and then alphabetically by the prospect's last name.

Enrollments by Date Report

This report will track prospects who enrolled between two dates you enter. The report can be run for a selected rep or all reps.

Students who enroll who were never in the Prospect software module will not be included in the report. The report only looks at prospect records.

High School Enrollments

The enrollment report lists each high school and the total enrollments associated with that school. An enrollment is counted for a high school during Student Entry if an enrollment date and a high school code are present on that entry screen.

Interview Schedules

From the Prospect/Reports menu, pick Interview Schedules. Enter the date for which Rep schedules are to be printed.

Leads Analysis Report

This report will count leads for a rep between two dates you enter. The lead date in the Prospect Database is checked against the two dates you enter for inclusion.

The leads found for that rep will be analyzed for the following activities: Initial Interviews, Follow-Up Interviews, No-Shows, Enrollments, Positive Attendance, Drops, Grads and those placed.

Notes: If the same lead had more than one follow-up interview, the follow-up total is only incremented by one. If the same lead had more than one no-show for several interviews, the no-show total is only counted as one.

Leads/Enrollments by Rep

This report prints prospects by rep with an indication of who is enrolled. Totals and percentages for enrollment are included for each rep.

Leads/Enrollments by Source

This report prints prospects by source code and includes totals and percentages for enrollments. In addition, the cost per lead is calculated for each source.

Prospect Work Sheets

This report prints one page per lead. It brings together demographics, prospect notes, interviews, interview notes, and a history of mailings for that person. Since it can print in tickle date order, it is ideal for contacting leads who are due for a call or mailing.

Rep Analysis Report

The prospect database, interview file, and student database are examined to print leads, appointments, no-shows, enrollments, starts, and sits (those who have attended at least once).

Rep Visit Report

Between two dates you choose, all rep high school visits can be reported, including any notes taken regarding the visit.

Source Code Report

This report will look at all prospects who became leads within the date range you select. The source code of each lead is examined and the cost per lead, cost per enrollment, and cost per start is determined. The report provides separate totals for source codes with a cost and source codes with no cost (such as walk-in's and referrals).

Tickle Date Report

This report prints leads by rep in tickle date order. Thus a rep can see at a glance which leads he should be attending to at the moment. Notes taken for each prospect are included on the report.

Utilities

Change Admissions Rep

This program will allow you to change the admin rep code for a prospect or a block of prospects. Simply enter the old Rep ID to be changed and the new Rep ID. If a prospect does not have the old Rep ID, no change will be made to that prospect. The change will be made to the Prospect Database as well as the Student Database (if the prospect has been enrolled).

Last Prospect Code

On this screen, you can alter the last prospect code used by the system. The next prospect code generated by the Prospect Entry program uses this file for that purpose. Care should be taken when modifying the last prospect code in that you can cause the system to generate a prospect number already utilized. Avoid entering an older prospect code unless you are sure there will be no duplicate codes created.

Purge Prospects

This utility program provides the means of erasing leads you no longer wish to retain in the system. Prospects are permanently removed and cannot be restored. You can specify a single prospect code, or utilize the options to erase many prospects at once.

Student Records

Student Records is the central module of the AS3 system around which all others revolve. Prospect Tracking feeds into Student Records, and information from Student Records flows out to other modules such as Career Services and Alumni. The main functions of this module are to schedule students, take attendance, and post grades, with the bottom line being the printing of student grade and attendance transcripts.

Support Files

In Student Records, this area contains four types of support files: History, Scheduling, Set-Up, and Listings. History Files will contain transactions that occur as you use the system, e.g., attendance records. Scheduling and Set-Up files are necessary to make the system "behave" in a manner required by your school's needs.

Listings

The Listing area enables you to print information that might be required from time-to-time. Following are some of the listings available:

Degree Audit File

> Lists the records you have entered in your Degree Audit Support File.

Extern File Listing

> This provides a report of students in your Externship File.

License Plate List

> Prints students in order of their License Plate number.

Major Listing

> Active students are reported in order of major with subtotals for each major.

Student Address List

This listing prints the student's name and address in student name order.

Student Database Listing

A detailed report of the data elements in the master records of students.

Student ID Listing

This program prints students by ID number. The students to be printed will be determined by how you answer the prompts.

Keep in mind that through the use of building a selection file (see Data Entry under Student Records), you can print students based on other criteria, such as GPA range.

You can give your report any title you choose (e.g., Honor Roll) by making the appropriate entry.

Student Name Listing

Prints students in name order and includes their major. This report can be run for one or more campuses (see Campus Group Code).

Student Status History Listing

This program prints all status records in status-start order for each student selected. You can choose a range of student start dates to help select the students to be processed; you can also opt to use the Input Selection File (option I) to pick your students to be printed.

Set-Up Support Files

Refer to the appendix in this manual regarding the order of populating the support files within the Student Records module. Some tables are required and others are not. Remember, you can press the **F6** key for help on a menu item when the cursor is at that point; you will often find suggestions related to the support files in the help text.

Set-Up Options

Add a single record to this file. The key, by default, is AS3. As you visit each data element of the table, press **F6** to understand your options.

Standards of Progress

On the left hand side, you indicate when a student should be evaluated. This can be based upon credits or hours attempted or a percentage thereof. Or, it can be related to a number of terms completed by the student.

For example, when checking at the end of each term, for each major, you will want a record for each term (Sequence Number). So, if the program has six terms, there will be six records here, with Sequence Numbers from 001 to 006. The Number of Terms field will also be numbered 1 - 6.

Populate the Minimum Earned Values as needed on the right-hand side for the six records.

After you records are set up, try running the Academic Progress report on the Reports Menu of Student Records and see if it is working, or not. This report can print students not making progress, or, both, those making progress and those not making progress.

Scheduling Set-Up Files

Term File

For the term you are about to schedule, make sure there is a record in the Term File with the start and end dates included in the record.

Course Catalog

Each course into which you will schedule your student must be defined here. The credits and/or hours are specified in these records.

Once a course has been created and students have been scheduled into that course, some changes made to the course catalog record will affect student history; for example, if ABC101 has a description of Advanced English and you change the description to Basic Math, students who took ABC101 as Advanced English two years ago will now show Basic Math on their transcripts. However, credits and hours can be changed in the course catalog record since these figures are transferred to and stored in the students' academic records at the point of scheduling.

Daily Hours File

This file is used by clock hour institutions to calculate the midpoint, expected, and maximum graduation dates during Student Entry.

The calculation is done using the student's expected start term, the number of clock hours in the Major File, the holidays defined in the Holiday File, and the hours per day found here in the Daily Hours File.

For example, if a program is 100 hours long, starts on 1/02/2009, meets five hours per day Monday through Friday, and January 13th is a holiday, the student's expected midpoint would be 1/16/2009 and the expected grad date would be 1/30/2009. When you enter a new student, and specify the Major Code and Expected Starting Term, the Expected Midpoint Date and the Expected Grad Date will be calculated and entered in the student's record automatically. The Maximum Grad Date will also be determined.

The presence of data in this file will also generate an end date as you enter Course Section records in your master schedule. For this to happen, you must relate a major with a Section Code. This is done in the Section Codes File. Thus, when entering a record in the Course Section File, if the section code you use has a major code associated with it (Section Codes File), then this Daily Hours File will be examined for that major: if found, then the hours it retrieves will be used to calculate the end date for the section (note that holidays will be taken into account when this is done).

Period File

The times of the day you offer classes must be defined in this table. The DESCRIPTION field will contain the time, e.g., 8:00 - 9:00 am (this description will print on the schedule). The start and end times are input in military time and are used to determine scheduling conflicts.

Section Codes

A section code enables you to offer the same course more than once during the same term. For example, if ENG101 fills up during registration, a second instance of this course might be offered. The second section could be offered at the same times or different times as the first section. It is the section code that permits you to open multiple occurrences of the same course.

At least one section must be defined in the Section Codes File. An example of the entries you might make would be as follows: 'A' for the section code, 'Section A' for the description, and the last field can be skipped.

Instructors

Enter your instructors in this file. Each course/section must have an instructor (or you can define a generic instructor such as STAFF if necessary).

Course Sections

This table contains your master schedule. Each course that meets must have a record in this file indicating a section number, the periods of each day the course meets, the instructor, start and end dates, etc. Read the help when the cursor is at each data element (by using the **F6** key in that field, then **F4** to exit help). The periods, defined in the period file, are placed in the appropriate slots (MONDAY through SUNDAY) to tell the system when the class meets during the week.

Blocks

If you are going to post a schedule by block (mod), create a block of courses in the Block File. Here you will indicate the courses that constitute the block. When you enter a schedule, you can specify the block code and have all the courses of that block brought onto the Schedule Entry screen.

If the block being defined is for a specific term and/or a specific section, you can optionally input one or both data elements in the header (fields two and three). If present, these data elements will be carried forward to the Schedule Entry screen saving time during data entry of the schedule.

Typically in a term-based institution, field one defines the block and only the courses are entered in the Course column. The Section data element (field #3) is sometimes helpful as well.

Following is an example of use of the Block File for a quarter-based program:

You will find the Block File under Student Records / Support Files / Scheduling Support Files. Prior to populating this file, you will have to populate the Term File, Course Catalog File, Course Section File.

Looking at a program which we will call MOA, you should create six block records if the program consists of six quarters. Call the blocks something like the following:

       MOA1

       MOA2

       MOA3

       MOA4

       MOA5

       MOA6

If the section will always be the same when scheduling students, enter the section code in the block record; otherwise, leave the section blank in the block record. Be sure to leave the term code blank because you will utilize the same block record term-after-term.

In the block record, only populate the second column: COURSE. Other columns will be blank for scheduling this type of program.

When you do Schedule Entry, you can specify the student, term, and block. If the section is in the Block record, you won't have to specify the section during Schedule Entry; otherwise, you will.

If you build a Selection File of students who are going to get the exact same schedule, you can use Modify Student Schedules to post the exact same schedule (by block) to all those students simultaneously. The Build Selection File program has options to automatically find students who have the same expected start date or actual start date and you can add the major as well.

In schools that prefer to post the students' entire schedule for the program at the outset, the other columns in the block record will come into play (Term, Start Date, End Date).

Data Entry

Student Entry

Students are input from the Student Records / Data Entry menu.

Convert a Prospect to a Student. From the Student Records/Data Entry menu, select Student Entry. Use the **F5** key to retrieve your prospect by name (you can type a portion of or all the name to find the lead in the list that appears). Press **ENTER** on the selected individual. You will then be asked to make the individual a student and to input the student ID. Most of the information on the initial demographics screen will be brought in from the prospect's record. Make any changes or additions necessary, then press F4 and respond YES to update the record. At this point, press **F4** again to return to additional options for this student.

If there were any Aptitude Test Records entered in Prospect Tracking while the individual was a prospect, those records will be copied to the Test Entry File in the Student Records Module.

Note: you are not restricted to only pulling in leads from the Prospect Tracking module. You have the option to simply enter your students and ignore the **F5** prospect retrieval key.

Student ID

You have the option of entering any combination of numbers or characters as the student number. You should enter the number left-justified. If using letters, it is recommended you use all capital letters and no spaces (this rule should be followed for the keys in all data files). If you wish to have the system generate a Student ID, press the **F3** key in field #1 (Student). The next available number will be retrieved and assigned to the new student. You can adjust the number that is to be generated by going to the following program:

Accounts Receivable / Support Files / Set-Up Support Files
Sequence Numbers

The system will add 1 to the number it finds in LAST STUDENT # to generate a new Student ID.

The system will report the last Student ID code in the Student Database if you press the **F7** key while your cursor is in the first field (1-Student) of the Student Entry program.

To **retrieve a student** already in the system, input the Student ID and press **ENTER**. Or, you can look up the student **by name** by typing part of the name in the ID field and follow with pressing **F2**. Once in the Look-up View, you can move around with the arrow and page keys, mouse, or you can press **F10** to "go to" a different portion of the list.

The student database is divided into several areas:

Demographics

This is where you will find the student's name, address, phone, email, etc. There is room for you to retain two addresses for the student: local and permanent. When you build correspondence, you will be able to select which address is to be used. If you use the function to copy a student from the Prospect File, the prospect's address will be duplicated in both addresses. You can change one if your situation requires you to track two different addresses for the student.

Admissions

Press **A** followed by **ENTER** and you will be taken to the Admissions area of the student's information. Here, you must enter an enrolled date if the student is to be enrolled. You must also be sure you give the student a major in the appropriate field. If the major is unknown or the student is not enrolling in a specific major, you should go to the Major File and define a record for unknown or continuing ed; this will allow you to make an entry in the major field.

Student Group is a data element that will enable you to group students together for processing. You can build a Selection File based upon this group code (see Build Selection File). Note that there are other means of grouping students as well (e.g., Current Term, First Term, Class Code, etc.).

Academics

The data elements found under Academics are typically maintained by the system; thus there should not be any entries necessary in this area when adding a new student.

Financial Information

The data elements found under Financial Information are typically maintained by the system; however, there are a few elements you might wish to track that will not be updated from other areas:

> *Credit Status* - any code to indicate credit status.
>
> *Sponsor* - A sponsor code which must be defined in the Sponsor File.
>
> *Fees Paid* - An information-only field to indicate if a student has paid the fees for enrollment.
>
> *Charge Code* - A code used to group students for a special billing of some sort, e.g., meal plan, parking charge, etc. The Automatic Billing program can select students with a particular charge code.
>
> *Transcript On Hold* - If this data element contains a 'Y,' you cannot print a transcript for the student.

Personal Information

On this screen for the student resides many data fields you will want to populate for reporting purposes. For example, gender, race code, and date of birth should be input.

Personal Records

A variety of information can be stored in the student's personal records file. The key to the record includes TYPE. The type can be F for family, E for employment, A for academic, or C for church. Since a record number is also available as part of the key, the student can have up to 61 records for each of the above types (1-9, A-Z, and a-z).

The Personal Records File is most importantly used to track an individual who will receive a 1098 form if he or she is other than the student. For example, if the father is to receive the 1098 form rather than the student, add a record with 'type' set to F for family. Input the father's name and address and the two fields related to the 1098.

ID Picture

If a student's picture is on the system and the System Administrator Options are set up so the picture and the viewer can be found, the student's picture will appear on the screen for viewing.

Schedule Entry

From the Data Entry selection within Student Records, choose Schedule Entry. Enter the student ID.

> *Term*. If you enter a term it will be used for the courses you are about to schedule. If you plan to specify a 'block', the term might be defined in the block and won't be necessary at this point, it will be copied in from the block. Entering a term will "plug" that code into all the open slots in the schedule; of course, they can be changed if necessary. When a student's existing schedule is to be retrieved for you, only academic records with a matching term code will be included; when you do not enter a term code, all academic records (without a grade) will be displayed on the screen regardless of the term (exception: if you utilize the Audit feature, audit courses will appear on the Schedule Entry screen even though they have an audit grade).
>
> *Block*. If you enter a block code defined in the Blocks File, the courses defined in that record will appear on the screen. You can then accept the block or make modifications as required.
>
> *Section.* A section identifies a specific record in your Course Section File (the master schedule). If you are using a block and the section is defined in the block, it will be retrieved for you and an entry will not be necessary. Like the term, entering a section will "plug" that code into all the open slots in the schedule; of course, they can be changed if necessary.
>
> Scheduling a student for a course requires three data elements on the line of the scheduling screen: term, course, and section. You can use your **F2** key in each of those fields to look-up valid entries. When at the SC (Section) field, **F2** will list sections for the term and course of the line you are entering, that is, sections you have defined in the Course Section File (you can also press **F3** in the SC field to get a list of what section codes are valid in your setup files).

Updating the Schedule. After you have made all your entries, press **PageDown** and respond with **F3** to print and update the schedule. If you want to cancel your entry of the schedule, press **F4** at any time prior to the update. Note that **F5** can be used to delete an existing schedule but you must press **F5** when you are at the Update prompt.

Grades. If a student has an existing schedule when you enter the student ID, the schedule will be retrieved and placed on the screen. You can then edit that schedule. Any course that already has a grade will not appear on the schedule entry screen; to delete such a course, you must first remove the grade using the Grade Entry program.

Repeated Courses. The same course cannot be scheduled more than once if the term and section are identical. If a course is being repeated that was taken in a prior term, you will be permitted to do so, but you will receive a warning message during the update of this situation unless the student did not pass the course (grade flagged as 'not passing'). Note that the system will not prevent you, however, from allowing a student to repeat a course, even if he or she received an 'A+' for the course in the prior term.

Prerequisites and Co-requisites. If you have defined prerequisites and/or co-requisites in your Course Links File, and you have 'checking' turned on in your Set-Up Options under Student Records/Support Files, the schedule you entered will be validated for any violations during the update. You will receive a warning message, but you will have the option to override the violations. An Equivalent will be recognized to fulfill a prerequisite and/or co-requisite if set up properly in the Course Links File.

Note that a prerequisite taken in a prior term but not yet graded will fulfill the prerequisite requirement. A course taken in a prior term with a passing grade will fulfill the co-requisite requirement; typically, however, a co-requisite is one that is scheduled simultaneously with another course.

You can define a minimum grade for a prerequisite to have been satisfied (see Course Catalog File).

Audits. A means of scheduling a student to audit a course is provided via the Section Code. You must limit yourself to single-character section codes. The second position of the section must contain an asterisk (*) if the student is auditing the course. The following actions must be taken during setup to utilize this feature:

> 1. Student Records/Support Files/Scheduling Support Files/Section Codes. Add records with an asterisk as the second character of the code. For example, if you already have records in the file for Sections 1, 2, 3, 4, and 5 and an audit can occur in any of those five sections, add the following additional records: 1*, 2*, 3*, 4*, 5*.
>
> 2. Student Records/Support Files/Set-Up Support Files/Grades. Add the grade the system will recognize as an audit (e.g., AUD). Set the flags appropriately (e.g., don't affect the GPA, etc.).
>
> 3. Accounts Receivable/Support Files/Set-Up Support Files/Set-Up Options. Add the grade used to identify an Audit. If you charge by the course (Charge Code X) and the amount of a course audited differs from a course not audited, enter the amount to be charged for auditing a course on this screen.

An audit example is as follows:

When scheduling a student into ENG101 Section 1 to audit this course, on the Schedule Entry screen, enter the section of 1* instead of just the single digit of '1.' The system will assign the grade you choose as the audit grade (such as AUD in the example above). Unlike other courses that receive grades, a course being audited will reappear on the screen if you call up the student's schedule during Schedule Entry even though the audit grade has been posted.

Last Scheduled is the last schedule (most recent) a student received. The term code of the schedule is written to this data element which will be found in Student Entry in the Academics area. This enables you to track who has a future schedule.

Interview Entry

You can track up to 99 different interviews for each student. This file can be utilized during the admissions process, or for financial aid, or for any other reason once the individual has been added via Student Entry. If you enter an 'F' for the interview type, the interview will be tracked on the Financial Aid Tracking Report.

Notes Entry

This screen allows you to enter notes. Press **ENTER** when positioned at the 'Notes' data field; the note-taking window will then open.

When you have completed your entry, press **F4**. Your options will be as follows:

> Y - Save and exit notes window.
>
> N - Do not save and exit notes window.
>
> S - Save your entry and continue taking notes.

Personal Note Entry

This version of taking notes allows you to specify a security level with each note you take for a student; the levels are 0 through 9 with level 9 being the most secure.

Each operator using AS3 can be assigned a level (see System Administrator) which is directly related to the ability to view notes. An operator cannot view notes that have a level greater than that of the operator. For example, if the operator's level for note viewing is set to 5, that operator cannot view notes that have a security level of 6, 7, 8, or 9 (only levels 0 through 5 can be viewed).

To input notes, optionally press **ENTER** for the date and time. Press **ENTER** when positioned at the 'Notes' data field; the note-taking window will then open. When you have completed your entry, press **F4**. Your options will be as follows:

> Y - Save and exit notes window.
>
> N - Do not save and exit notes window.
>
> S - Save your entry and continue taking notes.

Test Entry

This data file can optionally be used to track administrative tests taken by students. Unlike the similar file in the Prospect module, you track Student IDs in this file, not prospect codes. It is typically used for admissions exams, scholarship testing, etc.

If you place a minimum score in the Major File for a given major, the system will check both the Prospect Aptitude Test File and this Student Test File for a Total Score that is equal to or greater than that found in the Major File for the student's major. You will receive a warning if the test score is too low.

When entering a record in this file, the Total Score will automatically be calculated as the sum of scores one, two, and three. If you need to track only one score, place it in Score 1 and when you pass by the Total Score data element, it will pick up the entry you made in Score 1 as the Total Score.

Transfer Entry

This program is used to post an academic record to a student's historical transcript without going through the process of scheduling.

It is designed for the entry of courses taken at another institution. When used for this situation, choose a term code (such as three asterisks) so the credits transferred from another school will appear first on the transcript–asterisks sort lower than numbers and letters. In the Term File, give the term code a description such as "Transfer".

Transfer Entry can also be used when first bringing a system on-line and you wish to generate previous academic records for students. Otherwise, to create academic records, you must build a master schedule (Course Section File), then schedule the students using Schedule Entry, and, finally, use Grade Entry to post the grades. These steps can be avoided through the use of the Transfer Entry program.

Records are written to the Academic Records File with an instructor code of TRANS. The code of TRANS must be present in your Instructor File.

If you enter a total for absent and/or present, the academic record will contain this attendance total. Also, since the individual dates of the attendance are unknown, a single attendance transaction will be written to the Attendance History File for the entire amount of the attendance; the date of the attendance will arbitrarily be the course start date you entered in the Transfer Entry record.

Build Selection File

This program will build an operator's Selection File based on the parameters selected. The Selection File will always be number 99 in this situation (see Selection Files under Data Entry Hints). At the outset, you can choose to erase the existing Selection File or not; if you don't, you will be adding individuals to those already present in the file.

If you want to start a new Selection File 99, but don't want to lose information in the old one, first copy Selection File 99 to another selection file number. This can be done in the Create Selection File program (see Hot Key).

If you would like to know who has been placed in the Selection File, use your hot key (CTRL/P) to get you to the entry point for managing Selection Files. Call up Selection File #99 and use the **F3** key to print the file when at the 'Options OK' data element.

To check what Selection Files have been created, use your **F2** key (or right-click) to do a look-up when in field one Operator Code. The list that appears will begin with your operator code; however, you can scroll up and down through all the Selection Files for all the operators and make any choice.

Student Group is a data element field present in Student Entry / Admissions. You can search and retrieve students by student group. You can also choose to post a code to this field for records found by the search. An example of using this feature would be to search for students with a GPA between 3.00 and 4.00 and assign them a Student Group Code of HR for honor roll. Then using ODBC, you can download students with an HR Student Group Code to Excel, Word, or some other compatible product.

Externship

This table is used to track a student's enrollment in an externship. Note that the Company data element is related to the Company File found in Career Services.

Typically, the student is scheduled into the externship using the Schedule Entry program; this requires an entry in the Course Catalog. A grade can then be posted at the appropriate time and attendance can be entered in the normal fashion.

Graduation Journal and Update

This program will search for students who are ready to graduate based upon the parameters you enter. The list retrieved will appear on a view with the graduation flag set to 'Y'.

If the student should not graduate, change the GRAD flag to N. A student must have a Degree Code to graduate, so be certain that the Degree Code field contains data.

After updating the list on the display screen, you will receive a printout of the students selected for graduation. After the graduates have printed, you will have the option to update the list. If you respond N, no action will be taken and the students will not be graduated. When updated, the student will receive a record in the Student Degree File, the Status File, and his master Student Record is updated with a graduation date, grad major, degree awarded, and status code.

The Document Assignment File in Document Tracking is examined to determine what status code to post to a student's record. Make the necessary entry under the EVENT of GRADUATE in that file prior to running this program.

One method of stream-lining the list of potential graduates that will appear on your screen is to run the Update Prospective Graduates program prior to executing this job. That program will find students who are expected to graduate at the conclusion of the current term. Following that, you might want to run the Selected Grades Report to find students for the term who have missing grades–then remove students with missing grades from being prospective graduates by changing the flag on the Student Entry / Academics screen. Finally, when the Graduation Journal program is run, only the students who have enough credits (or clock hours) with no missing grades will be on

your graduation journal screen.

Attendance

Class Rosters

From the Student Records/Scheduling Reports menu, choose Class Rosters. Answer the prompts so as to select the rosters you wish to print. The printout is used by the instructor to take attendance when the class meets. This document will be the source of input when you record attendance.

Attendance Entry

On the Student Records/Attendance menu, pick Attendance Entry. Enter a date the class met followed by the other identifying data elements. The roster will appear on the screen. Mark absent those who were absent. Refer to the Set-Up Options under the Student Records Support Files to determine the type of entry you will be making. In most cases, use the letter 'A' to mark a student absent. Not making an entry will automatically mark the student present. Note that there is a setup option in student records to reverse the default from present to absent (see Setup Options under Support Files).

If you are entering hours (and portions of hours) absent, enter a number for the hours absent; for example, 1.5 would indicate 1 ½ hours absent. The set-up option for this capability must be the letter O, not H or 1 (see Set-Up Options under Student Records/Support Files).

When all entries are completed on the roster, press **F4** and you will be asked if you wish to update your entries.

The System Administrator can set up instructors as operators for the purpose of entering attendance (and grades). If this is done, only the rosters of a particular instructor will be available to that instructor for making entries (unless that instructor is marked as a 'super user' for this entry task, then the instructor can make entries for any course).

Attendance Entry by Block

This version of attendance entry can be quite useful for some program structures.

If a group of students meets in the same classes each day of the week throughout a given term, you might find this process of entering attendance easier than standard Attendance Entry.

This program requests a date, term, and Block. The rosters for courses found in the block record (see Blocks File) will be brought to the screen one at a time. The order of the courses in the Blocks File must correspond to the periods of the day (see Period File); for example, the first course in the block record must meet during period one, the second course in Block record must meet during period two, etc. Also, the periods you define in the Period File must be two characters with the first character being the letter "P" and the second character being a number that corresponds to the position of the course in the block record.

Prior to running this program, be sure you have specified how you will be entering attendance. This is accomplished under Student Records on the Set-Up Options screen.

Enter the hours absent or attendance code for each student on the roster. Skip over students who were present, they will be marked present automatically.

Upon completion of the input, press **F4** and the attendance will be posted to the Attendance Journal File. The students' permanent attendance records are not altered by this process; you must first run the Update Attendance program which will post the Attendance Journal to the Attendance History File.

Students who currently have a status code of one of the following types will not appear on the roster: NO SHOW, GRADUATE, LEAVE OF ABSENCE, or WITHDRAWAL.

Student Attendance Entry

In the event you must enter attendance for a single student after the attendance for the class has been entered <u>and updated</u>, you may utilize this function to make an entry for a single student. Be careful when inputting the data in that verifications are not made as to what you enter for the amount of attendance, the attendance code, the date the class met, etc.

When you add the record, it is written to the Attendance Journal the same as when you input class attendance. Thus, you will see the record in Journal Edit; and, you will have to run the Attendance Update to post it to the student's permanent attendance history.

Import Attendance Records

This function provides the ability to import the attendance of your students. The daily attendance (students who were present) must be in a text file in the following format and must have fixed length fields as shown:

Student ID(9) Term Code(8) Course Number(8) Section(2) Period(2).

The end of each record must have a carriage return and line feed or any two characters. There should be no commas to delimit the fields.

Students found in the text file will be marked present. Students not found in the text file will be marked absent. The name of the text file must be the year (one digit) followed by the month (MM), day (DD), and the campus code (NNN). For example, a file for January 7th 2009 for campus 100 would have the following name: 90107100. The file cannot have an extension on it such as .txt or .dat.

Since the name of the file indicates the date of attendance, that date is posted for the students in the attendance records. All attendance for all courses of the school must be in the file when the import is executed; otherwise, present students will get marked absent.

Records imported are written to the Journal Edit and do not become part of the actual attendance history unless you run the Attendance Update. If the import is run in error, erase the journal and re-run the import when ready.

Journal Edit

This program is used to correct any entries made while taking attendance. You can use SHIFT/DELETE to remove an entry. Records in this file will print on the Journal List by Course and the Journal List by Student. These records are not yet updated to the permanent history file.

Journal List by Course

This report prints all entries made using Attendance Entry. This journal cannot be printed once the attendance is updated. The journal will print present and absent records.

Journal List by Student

This journal produces a list of students who were marked absent. Students who were present will not be printed. Once the attendance is updated, records will be cleared from this journal and cannot be printed.

Erase Journal Edit

In the event attendance was taken incorrectly and you wish to remove all the records in the Attendance Journal, this function will do that for you. To delete only some records, press shift/delete on the row you wish to remove instead of running this process.

Update Attendance

After your batch entry of attendance has been completed, run this program to move the attendance from the temporary journal to the permanent attendance history. You can enter a date range for the update if you don't wish to update all records in the journal.

History Edit/Make-Up

This program is used to modify attendance once it has been updated to the permanent attendance history. Select the record to be modified and then input the changes to absent, present, and/or make-up. To award a student make-up hours, place those hours in the make-up element (do not reduce the absent hours when adding make-up time); you have the option to track the actual date the make-up attendance occurred.

Make-Up Entry

This entry function might be preferable over History Edit/Make-Up for inputting make-up attendance when the amount of entries to be made is high. It is easier to find a student's academic records for posting the make-up attendance.

However, the disadvantage to using this method is that it does not update the attendance totals in the academic records; this task must be done after the entries are completed using the Rebuild Academics utility program; choose the Attendance option under Academic Records when you execute that utility. This rebuild does not have to be done if you enter make-up attendance using History Edit / Make-Up.

Unlike History Edit / Make-Up, you cannot enter the actual date of the Make-Up Attendance using this program.

Inquiry

Run the Attendance Inquiry program from the attendance menu. Ask for a hard copy if you wish to print a student's attendance transcript.

Verification

This option provides a report which will indicate what attendance rosters were not entered between two dates you select. Each time you enter the attendance for a roster and choose to update it, the system 'remembers' you responded 'Y' to the update. The Verification Report will print the rosters you never updated.

Attendance Reports

Several reports are available on the Attendance / Reports Menu. Use your **F6** help key while on the menu to determine the purpose of each report and some hints on how to run them.

Attendance Rate Report

Reports the rate of absence for students. You can choose a cutoff absent percentage so the report will only include students whose rate of absence has reached that point. An option is provided to update the Attendance Probation flag found under Academics of the Student Entry program; this report can set that flag to Y or N depending upon your choices when the report is executed.

Attendance Summary

This report determines a student's rate of presence for the term requested. An attendance rate will be calculated by dividing the presence plus make-up by the present plus absent hours (in other words scheduled hours).

 The total present for the week the program is run will be reported. The weekly present hours will be added up from the Monday prior to the week-ending date you choose when you run the program. If you do not enter a date, today's date will be used as the week-ending date.

In addition to the weekly present hours, the report includes term-to-date present hours, including make-up time.

Attendance Transcript

When you request a hard copy during Attendance Inquiry for a student, a complete transcript will be printed with options for absence, presence, or both.

Class Attendance Report

This report will print attendance by class for students. You may specify a cutoff percentage so that only students with excessive absence will be printed; instead of a percentage, you can enter a number of times absent as a selection criterion. A single course code can be requested, or all courses can be analyzed. The LDA for each class is included as well as an overall LDA for the student. This report can update the Attendance Probation flag which can be found in the Student Database. An absent rate is printed for each course, term, and overall for the student.

Consecutive Absent Report

This new report will find students who miss a selected number of days in a row since their last LDA in any given course. Unlike the Consecutive Days Report, this report looks at individual courses not entire days of absence.

Consecutive Days Report

Finds students who have missed all classes for X number of days in a row. This report will allow you to build a Selection File which can then, in turn, be used to send letters/emails to those students found using the report.

Grid

Prints one page per student with a code for each day reported. Daily codes will indicate present all day, absent all day, partial presence, holiday, etc. Cumulative and term summary attendance is included.

Attendance Grid by Course

This program provides attendance reporting as a grid, one page per student. The report will print for each student selected within the range of dates for a given term.

This report differs from the Attendance Grid in that each course for a student is reported for each day rather than looking at all courses simultaneously for a given day.

The following codes will print on the grid for any given day:

P = Present. M = Make-up attendance found for this day. H = Holiday (that date is in the Holiday File). - = The student has no classes scheduled that day. A = The student was absent for all classes that day. # or F = A number will print if the student was present for some of the classes on a given day; the number will be the total number of classes attended that day. In the case of attendance taken by the clock hour, the number of hours will be printed; however, note that only a whole number will print; if there is a fraction, it will not be printed--an 'F' will print instead. * = A whole number larger than nine(9) was to be printed. This would probably indicate some type of error condition with the student's schedule or attendance (unless it is possible to take 10 courses or 10 hours of study in a single day). X = Date is beyond the last date for which attendance was updated.

Note that if a student is enrolled in more than one major, records for all majors are included in the grid.

History by Student

This report prints all historical attendance records in student name order.

Instructor / Course Attendance Rates

Prints rates of attendance for each course and for instructors as well.

Last Date of Attendance Report

This report will search for a student's last date of attendance. If you do not enter a course, the student's overall LDA from the Student Entry screen (Academics) will be reported. If you specify a course, the student's LDA for that particular course will be reported.

Monthly Attendance Report

This report is restricted to a single month's attendance for one or more students. The report has the capability of crossing term boundaries. For example, if term '091' ends on 1/15/09 and term '092' starts on 1/16/09, the report will process both terms if run for January, 2009.

The register will print each student on a single line with the following codes appearing:

A = The student missed all classes on this date.

P = The student was present for all classes on this date.

* = Partial attendance on this date.

N = No Show (will remain on report for 365 days).

W = Withdrew (will remain on report for 365 days).

G = Graduate (will remain on report for 365 days).

X = Attendance has not yet been entered for this date.

Perfect Attendance

Reports students with perfect attendance for the date range selected.

Probation Report

This report will print any student whose attendance probation flag is set to 'Y' in the Academics section of the Student Entry program. The probation flag can be set manually, or the Attendance Rate Report can automatically update the flag.

Roll Books

A printout of the instructor's roll book is available with this report. All students for a given class are printed on the page, one line per student. Each column represents a date within the term and an indication of present or absent is made for each date. If the student drops the class the LDA is printed in the right-most column. A landscape printer with condensed print of 20 characters per inch must be used; in addition, the lines per inch must be set to 12.

Show / No-Show Report

Within a date range selected, students will be grouped by always absent, perfect attendance, no attendance, and mixed attendance.

Grades

Grade Entry

From the Student Records/Data Entry menu, select Grade Entry. Enter the term, course, and section for the course in which grades will be input. Move through the roster, putting grades in for students on the roster. Updating the entries you have made will post them directly to the academic records and will immediately appear on the transcript. When you change an existing grade, a record will be written to the Grade Change Journal.

Skill Grades

A grade in addition to the final grade can be maintained in the academic record of each course a student takes. Although this field is labeled Midterm Grade, it also holds the skill grade. To use this field for both types of grades, understand that after you enter and print midterm grades, this field is then available for the Skill Grade which can print on your end-of-term transcript. You might need to erase the midterm grades if you utilize the midterm grade and all courses don't get skill grades.

Academic Records Inquiry

From the Inquiries menu, select Academic Records. Enter the student ID and specify a term or use **F5** for all terms. A hard copy will print a transcript for the student. Note that there are several different transcripts available. The format of the transcript that will print is controlled by a set-up option found in Student Records / Support Files / Set-Up Support Files / Set-Up Options.

Midterm Grade Entry

From the Student Records/Data Entry menu, select Grade Entry-Midterm. Enter the term, course, and section for the course in which grades will be input. Move through the roster, putting grades in for students on the roster. Updating the entries you have made will post them directly to the academic records and will immediately appear on the Midterm Transcript.

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Student Status Codes

Automatic status assignment

The system provides the capability to post status codes to students based on student 'life cycle' events. The Document Assignment File within the Document Tracking module lets you control the posting of student and prospect status codes.

In addition, the *Set-Up Options* in the Student Records Support Files, gives you the option to post a status to a student when his or her record is first added.

Status Entry

From Student Records/Data Entry, choose Status Entry. This program is used to change a student's status, including Graduation, Withdrawal, LOA, Re-Entry, etc. Practice using this program on one of your test students.

> *Status Type.* The type of status is used by the AS3 reports to know the essence of the status. For example, if the type is W and the status code is D (for Dropped), the AS3 system will recognize the D status as a withdrawal type status because of the W type. If the status type is N for no-show the student's start date will be removed if no positive attendance was ever posted.
>
> A status type of R is used when re-entering a student. Re-entering can be returning from an LOA or a student who had dropped or graduated and is coming back to school. In all cases, when you post the R-type status, all previous status records for the student will be analyzed, and any found without a status end date (such as LOA's, drops, and grads) will be given an end date–the end date posted will be one day prior to the re-entry date you use (the Effective Date of the R status).

For example, a student goes on LOA. Status Entry is done to post a status of L. An Effective Date and Expected End Date are input, but no Actual End Date. When the student returns, an R status is entered. The R status has a Type of R and a 'Status To Update' of A (for active). After posting the R status, the old status record of L will have an Actual End Date (one day prior to the re-entry). The student's current status code will now be A (for active).

A status type of A is used to define a status code which means active.

Type G is for Graduate, L is for Leave of Absence, and T is for transfer from one major to another.

Type X is for a cancellation. When a student receives a status of type 'X'*,* the system will check if the student ever received a grade for any course. If not, his enrollment, start, and last attended dates will be removed from his file; also, his first and current terms will be cleared. You should have the flag set in the status code record to delete a future schedule so the scheduled courses will be removed for that student. Finally, any unpaid financial aid awards posted for the student will be deleted from the system.

Effective Date. This is the date the status begins. It is the graduation date, the withdrawal date, the first day of an LOA, the date of re-entry, etc.

Expected End. This date is used for LOA status codes.

Degree Code. Enter the degree awarded when posting a graduating status.

Grade. If the entry is for withdrawal, a grade entered here will be posted to the student's academic records that do not yet have a grade (typically used for withdrawal grades).

Non-Attending. This entry should be 'Y' if the status code being posted indicates the student is no longer attending school, e.g., withdrawal, LOA, graduation.

Actual End Date. An entry is made here when the end date of an LOA is known. Otherwise, the field should remain blank. It will be updated automatically when a re-entry is done (Status Type=R).

New Major. When a student re-enters (status <u>type</u> R), the student's new major must be placed in this data field if it has changed. If it hasn't changed, re-enter the same major code.

When the entry is accepted, the student database is updated (if specified so in the Status Codes File). In addition, a status record is written to the Status Records File for the student. If some element of a status needs correction, you can modify the status record on the Student Records/Support Files/History menu (Status Records).

IMPORTANT: This program will update several data files when an entry is made. Thus, you should <u>not</u> try to manually assign a status to a student by entering a date in the student's master record (e.g., a grad or withdrawal date). Those types of dates must be managed through the use of this Status Entry Program.

Status Inquiry

From the Inquiries menu, you can run the Student Status Records program to view a student's current status. In addition, all historical status records will be included with the inquiry.

Status records are written to the Status History File by Status Entry, but can also be automatically generated through the Document Tracking Module. The Document Assignment File of that module permits a status record and/or status code to be generated when a student life cycle event occurs (e.g., leave of absence).

Reports – Academics

On the Student Records/Reports menu, you will find a selection for reports that are related to Academics.

Academic Progress

This report will examine your setup file for Standards of Progress and then determine which students are not making progress at a selected point in time. Each major will have its own 'progress policy.'

When populating the support file for standards of progress, create one record for each time a student is to be evaluated (the Sequence Number will control the order of the records). Note there are five choices from which to pick a check point.

In the Earned Values section, make an entry in one of the four choices. Also, enter the grade point average for that point in time.

The report will produce a list of students not making progress. The academic progress flag in the student database will be updated (see Student Entry/Academics screen).

Class Ranking Report

This function will list students in order of their GPA for the term (or cum) selected. You can title the report to fit your needs, such as Honor Roll, President's List, Class Ranking, etc.

Only students with a GPA within the range you choose, will be printed.

If you enter a student comment, it will be added to the student's database and will appear on the transcript for the term you processed.

If you don't input a term, the report will run for all of a student's courses (cumulative). Also, without the entry of a term, you cannot add a student comment to a student's records.

Course Completion Rates

This report will print students for the terms selected (all or one), showing each course and grade. At the foot of each term will be the term GPA, the cumulative GPA, and the cumulative completion rate for that student.

There is an option to not include details in which case only the total lines for each term will print, eliminating the individual courses and grades.

If a grade is flagged as a 'transfer grade' (see Grade File), it will not be Included in the Attempted Credits of the student's major.

Degree Audit

The purpose of the Degree Audit is to print the courses a student is required to complete in the pursuit of graduating from his or her program. If the student has finished a course, it will print with the grade and term completed. Repeated courses and failures are tracked at the foot of the Degree Audit.

The Degree Audit File must first be populated for the Degree Audit Report to function. This data file will be found on the Student Records / Support Files / Set-Up Support Files Menu. Pay special attention to the help (**F6**) on the data fields.

In addition to the required courses, you can set up electives and/or elective groups. To add an elective course or courses follow these steps:

> 1. First populate the degree audit core courses using data fields one through four in the records.
>
>> a. The Effective Date is matched against one of three dates the student might have for the purpose of selecting one of several degree audits you might have for the same major. First, the Student Majors File is examined for a record with an effective date. If none is found, then the re-entry date in the student's master record (Student Entry) will be checked; if no re-entry date is found, then the student's start date is used.
>>
>> b. The Sequence Number determines the _order_ of the courses on the degree audit printout. Read the **F6** help on this field for very important numbering suggestions.
>
> 2. A record to specify the elective group follows the entry of the core courses. The data in this record will differ from the core records in that the sequence number will be higher, there will be no course code, and the elective group will contain a code (this code must begin with an asterisk). Place a definition for the group in the Elective Group Description field such as the following example:

----------------- Science Electives (Choose 3 Hours) ---------------

It is **<u>very important</u>** that the first Elective Record has a description.

3. Now populate the Degree Audit File with the elective group. The first field (Major) will contain the elective group code you chose in step 2, above. The effective date will be the same as the core courses in step 1, above. The sequence number will be one that is higher than the one placed in the first elective record defined in step 2, above. Finally, you will enter the course number. Do not make any other entries in the record (fields four through seven).

4. Keep in mind that the same elective group can be used with more than one degree audit. For example, if every program has the same electives, define one elective group with a code such as *ALL and apply that code to each major's degree audit (step 2 above). Since elective groups must come at the end of the core courses of a degree audit, It would be wise to make sure the Sequence Numbers used in the elective groups are higher than any of the degree audit records belonging to each major's core courses. For example, start your core courses with Sequence Number 100 and your elective group courses with Sequence Number 800.

The Degree Audit will recognize equivalents, that is, a student may satisfy the requirement for a given course by taking a different course. You can set up equivalents in the Course Links File, which you will find on the Student Records / Support Files / Scheduling Support Files Menu. You will notice the layout of the Degree Audit is geared towards the use of equivalents since it prints the requirement on the left side and the course that satisfies it at the right.

GPA Report

This report will print a student's current term, the Term GPA, and the CUM GPA from the Student Entry / Academics screen.

Enter the current term when you run the program. The GPA's are not recalculated at the time the report is run as is the case with the transcript and other reports. To be certain the GPA's are accurate, you would need to run the Rebuild Academics program in the Utilities section of Student Records. Note that the GPA's are updated during the End-Of-Term update.

If you do not enter a term when you run the program, each student's term GPA will be determined by whatever term code is presently in their Current Term field (Academics screen of Student Entry/Inquiry).

Grade Summary Report

Grades are summarized by course and by instructor. In addition, a GPA is printed for each course and each instructor.

Midterm Grades Report

You can print the midterm grades and sort the output by grade or student. This provides an easy way to identify students who are not doing well in a given course.

Missing Midterm Grades

This report provides the tool necessary to find courses for which midterm grades have not yet been input.

Repeated Courses Report

Students with an academic record within the date range selected will be analyzed to determine if a course was repeated. The course(s) repeated will be printed on the report. Equivalent courses are considered when the search for repeats is undergone.

Selected Grades Report

This report will search the database for students who received a grade you select. By not selecting a grade (responding with no entry for grade), you will locate students with missing grades.

Transcripts

Once a student has a schedule, his transcript can be printed; you are not required to first enter grades. If you do not enter a term code, the entire transcript prints; if you do include a term code, only records for the requested term will be printed (this will serve the purpose of a Report Card).

When only a single transcript is required, it is an easier task to print it from the Academic Records / Inquiry Menu. When you ask for a hard copy during the inquiry, you will get a transcript.

If a student was in more than one major, the academic records on the transcript can be grouped by major with totals provided for each major. This sorted output depends on your Set-Up Options in Student Records.

Information about a student's graduation will print at the end of the transcript (following the cumulative totals). The graduation data which prints is stored in the Student Degree File. The Student Degree File gets populated when a student is graduated using the Status Entry program.

There are several versions of the transcript available. The information about each will be found using the **F6** help key in the Set-Up Options of Student Records.

Midterm Transcripts

The midterm transcripts will print for a selected term and will include the grades entered using the Midterm Grade Entry program. Grades are not averaged on this transcript.

Reports – Population

On the Student Records/Reports menu, you will find a selection for reports that are related to student population.

Active Students by Date Report

This report prints students who were active between two dates you enter. The students must have only an active status during the time period. If you enter the same date twice, you can get an active list for that date.

If the student received any inactive status following the active status types within the date range, he will be excluded from the report. If the student received an active status following an inactive status during the date range, he will be included on the report.

Active status *type* is: A (Active). (Note that a status type is not the same as a status code).

Inactive status *types* are as follows: Graduate, Withdrawal, Completer, LOA, No-Show, and Cancel.

This report will print in start date order with subtotals for start dates. At the conclusion, a second report will appear listing the totals by Race Code.

Completion/Graduates Rate Report

This report determines the rate of completions/graduations of a group of students selected to be processed.

Any student who withdraws within 30 days of his or her start date will not be counted. A student who has a 'special withdrawal' (see Reason Code File) will not be counted as a withdrawal regardless of the withdrawal date.

A student is only counted as a graduate if he or she graduated within the maximum length of attendance defined in the Major File. If no maximum length is found for the student's major, a default of 150% will be used.

The students found who graduated, will be counted in the numerator of the formula. All students not omitted from the count will be placed in the denominator. The percentage rate will be the result of dividing the numerator by the denominator.

Days Active by Student Report

This report will print the number of days a student was considered an active student during his enrollment in school. If the student went on a leave of absence during his enrollment, those days will not be totaled.

Drops Report

Students with a withdrawal status within the date range you specify will be reported. However, if a student returns to school after the drop date but within the date range of the report, the student will not appear as a drop.

Expected Graduates List

This program will print students who are expected to graduate between two dates selected by you. The output is sorted by major, and, within major, sorted by name.

Totals are provided for each major.

This report will look at the Expected Graduation Date found in the Student Entry program in the Admissions section.

Future Starts Report

This report provides a list of students expecting to start school who have a matching Expected Starting Term that you request. An expected starting term is entered on the Admissions screen of Student Entry.

Graduates List by Major

This program will print students who graduated within a range of two dates selected by you. The output is sorted by major, and, within major, sorted by name. Totals are provided for each major.

Maximum Completion Report

This report looks at a student's Maximum Completion Date in the student database record. It then compares that date to the current date to determine if the student has exceeded his allowable time in the program.

You can enter a number of days to find students who are approaching their maximum completion date. For example, if you input 15 for the cutoff date, a student will be included in the report if he has exceeded his completion date, or is within 15 days of the date.

Students without a maximum completion date, and inactive students, will not be included in the report. An active student with enough credits (or clock hours) to graduate will be flagged as 'GRAD!'.

Population Report

Within a date range you select, your database is monitored for new starts, current students, LOA students, transfers, graduates, completers, drops, and re-entries. The student population is reported for the beginning and ending date range for which the report is run.

A second printout will follow which will include any Education Codes you have defined in your Education Code support file. An education code can be assigned to a student as he is entered as a new student on the Admissions screen of Student Entry. Examples of codes you might use are AB (ability to benefit), GD (GED), etc.

Two additional reports will be printed. First the Race Code Report prints then the Title IV Report. These reports provide important information related to the students reported.

Prospective Graduates Report

This function prints students who have a 'Y' in the prospective graduate field of the Student Database record. The 'Y' code can be entered manually using 'Student Entry', or the 'Update Prospective Graduates' program can perform this task automatically.

Students that have a graduation date or a withdrawal date will be excluded from the report.

Starts Report

This report prints students who started between two dates you select. If a student received a status code of NO-SHOW or CANCEL and there is no Re-Entry Date following the status, the student will not be included. If there is a re-entry date for the student, it must fall within the date range specified.

If a student has a graduation or withdrawal date within the date range of the report, those dates will be printed and totaled.

The report will sort by major with totals included for each program.

Students by Status Report

A listing in order of status code is available with this selection. Enter a date range and any students receiving a status code during that period of time will be reported.

An option is available to print for a given admin rep, major, or class code. The beginning date of the student's status must be within the date range you select; otherwise, the status record will not be included.

Reports - Scheduling

On the Student Records/Reports menu, you will find a selection for reports that are related to scheduling students.

Class Rosters

Once you have entered schedules for your students, you can now print classroom rosters for the instructors. The rosters were designed to be utilized for an entire week, having a column for each day of the week. Note that rosters can be printed in course number order or instructor code order.

Most often, rosters are printed within the time frame of a given term code. However, if you do not input a term code, but enter a date range instead, students in the same course/section with the same starting date will be included on the same roster even if the term codes are different.

Course Enrollment Report

This report prints course section records for a term you select at the outset. Maximum, enrolled, and available seats are reported for each course. Other data elements printed are instructor, room, start/end dates, etc.

Edit Journal

All additions, changes, and/or deletions made to student schedules are tracked in a journal and can be printed by running this report. Several options are provided for sorting the output. The records can be erased from the journal with the Purge Edit Journal program on the Utilities Menu in Student Records.

Grade Rosters

A program is available for posting grades. The student names will not print. In one version, the student ID and last four digits of the SSN print; the other version will not include the student ID (only the last four digits of the SSN. The version you prefer is designated under

STUDENT RECORDS / SUPPORT FILES / SETUP SUPPORT FILES / SET-UP OPTIONS.

Midpoint Report

Through the use of this function, you can find students whose expected midpoint falls between two dates you choose when the report is run. You have an option to build a Selection File from the output, which makes financial aid disbursement easier, depending upon the type of institution.

New Enrollments Report

This report will print new enrollments within a date range you specify.

It prints the Applied Date, Enrolled Date, and student's phone number. If the student's FEES PAID in Student Entry/Financial is marked with a 'Y', you will see a 'Y' in the Registration Deposit column.

Not Scheduled Report

This report will print students who have an expected starting term that matches that which is entered by the operator. Only students who weren't scheduled (no current term) and who haven't graduated or dropped will be printed.

Prerequisites Report

For the term or date range you choose, a student's schedule will be checked to insure that he or she has met any required prerequisites. If a prerequisite was taken, but the grade is not yet posted, it will be assumed to have been passed (of course you should rerun the report later when the grades are in).

Equivalents will be considered when this report is running. Thus, if a student passed the equivalent of a prerequisite, it will fulfill the requirement. Equivalents and Prerequisites are set up in the Course Links File in the Scheduling Support Files section of Student Records.

Room Schedules

Like students and instructors, you can print schedules for rooms. This report will aid in finding available space for a given day of the week and time of day. Schedules print one page per room.

Schedules

Schedules can be printed for students, instructors, and/or rooms. There are several options available for the appearance of the student schedule; this is controlled by the Setup Options in Student Records / Setup Support Files. The purpose of the Room Schedule is to show you when, during the week, a room is in use and when it is available.

Sign-In Rosters

These rosters provide a format for a student to sign into class and to sign out when leaving. Your terminal's session date is used to determine if a sign-in roster should print. A class that meets on Monday and Thursday will not print on Tuesday. You can change your session date from the AS3 menu or the hot key menu (CTRL/P), if necessary.

Another version of the Sign-In Rosters can be used to sign for the receipt of the book(s). The books for the course will print on the roster. The student can sign his/her name and indicate that the books were received or the books were declined. You must specify in the Student Records / Support Files / Setup Support Files / Setup Options that the Sign-In Roster you want to print is AIRSRSI2.

Summary Schedules

Student schedules can be printed in report format for a selected term or date range. A student's current and cumulative hours are included.

Term Enrollment Report

After selecting a term, or a data range, students who have academic records matching your choice will be printed in name order. The total number of students listed is included.

Term Schedule Listing

This program prints all the courses and sections scheduled for a selected term (or a range of two dates for non-term institutions).

Course sections which are closed will not print. The output is in the order of term code, days of the week the courses meet, and time of the day (period).

An option is available to print a selected range of course/sections.

If a course does not always meet during the same period(s) on each day scheduled, an asterisk (*) will print prior to the course number.

Reports – Student Login

You have an option to set up an entry point (icon) to AS3 which gives a student the option to print any or all of the following documents:

Transcript

Degree Audit

Schedule

Account Card (Statement)

The System Administrator can determine which (if any) of these documents will be an option for printing. The student will need to enter his or her student ID and pin number when logging in. The student is not permitted to migrate to any other options or menus within the AS3 software.

Correspondence

Refer to the correspondence documentation under the heading of Prospect Tracking. All correspondence modules in AS3 operate in the same fashion with the exception of the following features present in this module:

Note that in this module the Student Correspondence File can include three types of data: students, instructors, and high schools. When you run the Build Correspondence program, you can choose the type of data to be collected. The printing programs for letters and labels will then print for the group chosen.

Letter Group File

This file enables you to group letters together for the purpose of generating one or more letters for a student when a student life cycle event occurs. Events are defined in the Document Tracking module and include such things as enrollment, start, graduation, etc.

Here, you specify the codes that identify the letters you created using the Enter Letters program. You link one or more letters to a Letter Group by adding records in this file. For example, if two letters are to be generated when an individual graduates, the Letter Group might be 'G' for both letters but the Letter Code would be different in each case to identify each letter.

The number of days will indicate when the letters will be generated. You can have letters sent a number of days prior to an event date (place a minus sign prior to the days you enter), or a number of days following an event date. You specify the date using the Date Type field found in the record; for example, a date type of 'G' tells the computer your letters are to be generated 'x' days before or after the student's graduation date.

Letters Pending File

Records are automatically posted to this file when an event defined in the Document Assignment File occurs; the letter code found in that file will trigger the letters in the Letter Group File that have a matching letter code. They will be generated and posted to this Letters Pending File.

The Build Correspondence program provides an option to import letters which are pending to the Correspondence File (from where the letters can be printed).

Only one letter at a time can be processed for a given student, so letters should not be set up to be generated for the same date; otherwise, you will have to run the *build program* twice on the same date.

An example of automatically generating student letters is as follows:

> 1. Create a letter using Letters Entry related to a student's expected start date.

2. Add a record to the Letter Group File with a letter code of 'X' and using the letter's name in the Letter Code field. In the Days field enter a zero. Place an 'X' in the Date Type field.

3. Within Document Tracking, in the Document Assignment File, change the existing record that has an event named EXPECT. Put an 'X' in the Letter Group field. Make sure the event is "turned on" ('Y' in the ON? Field).

4. Add a student giving him an expected start date in the Admissions area.

5. A record should now be in the Letters Pending File with a print date. If the date is today or older, continue to the next step. A record with a future date must wait!

6. Run the Build Correspondence File program, putting a 'Y' in the Pending Letters field.

7. Run the Print Letters program. Your letter should print.

Utilities

This menu contains programs used infrequently; however, they are extremely useful at the right point in time.

Automatic Grade Change

This program can change all grades found that match your request to another grade you choose. It is very convenient for changing 'incomplete' grades to 'failure' grades (e.g., INC –> F). Unlike Grade Entry, the Student Database is updated with credits, hours, and the GPA. Each grade change to be posted will be printed prior to updating the files. Each grade change that subsequently gets updated will be logged in the Grade Change Journal.

Automatic Promotion

If the Class Code data element in the student database is used in a manner that students move from one class code to the next based upon earning credits, this utility can be used to determine if a student is ready to be 'promoted' to the next class code. The analysis will determine if the student is ready to be promoted based upon his earned credits/hours and his GPA. The Class Code File in Student Records / Support Files contains the parameters necessary for this operation to function. This utility is designed to be run after the End Of Term Update has been run. The student's class code is automatically changed if he meets the requirements.

Archive/Purge Students

Students can be moved to the archive files or erased from the system. You can specify a single student, or utilize the options to process many students.

If you use the P option to purge students, those records are erased and cannot be restored without reloading your data files from a backup medium. When you utilize the A option to archive, records are moved to the archive files and can be restored using the Restore program.

From this same menu, you can print a listing of students in the archive file. From the Inquiry Menu, you can look at a student's basic record which is residing in the Archive File.

Restore Students

Students can be restored from the archive files and be returned to the live, active files.

Calculate Expected Grad Date

This function allows you to determine a student's expected graduation date.

You must enter the term during which the student begins the program. Also, you must specify the major. The system will look at the Major File to get the length of the program and the Daily Hours File to determine how many hours per week the student will attend. The Holiday File will be taken into account when the calculation is done.

Change Student ID

A student's ID number will be found throughout many data files within AS3. This program will search those files and make the requested change. Be sure the process completes normally; otherwise, only some of the records will be changed.

Copy Degree Audits

When a degree audit changes, the old degree audit must remain in place for the students for whom it applies. A new degree audit must be created for the major with a new effective date for new students entering the program. Since a degree audit will not usually change radically, it is often easier to copy the previous degree audit for a major changing only the effective date–then make your modifications to the newly created degree audit.

Copy/Purge Sections

This utility is handy to copy records in the Course Section File (your master schedule) from one term code to another. Following the copy, you need only make minor modifications to each record (e.g., instructor code). This program can also be used to remove old unnecessary records from the file (you should retain records for terms for which you need to enter attendance, grades, or print reports).

Grade Change Journal

This listing will print all entries currently in the Grade Change Journal. You can select a term or print all entries. When, and if, you update the journal, the records with a matching term will be erased from the journal.

Graduation Journal and Update

This program will search for students who are ready to graduate based upon the parameters you enter. The list retrieved will appear on a view with the graduation flag set to 'Y'.

If the student should not graduate, change the GRAD flag to N. A student must have a Degree Code to graduate, so be certain that that field on the Graduation Journal input screen contains the proper Degree Code for the group that you are graduating.

If you enter a term code, only students who have at least one academic record for that term will appear. Student's with a graduation date in their student record (Student Entry/Academics) will not appear.

After updating the list on the display screen, you will receive a printout of the students selected for graduation. After the graduates have printed, you will have the option to update the list. If you respond N, no action will be taken and the students will not be graduated.

The Document Assignment File in Document Tracking is examined to determine what status code to post to a student's record. Make the necessary entry under the EVENT of GRADUATE in that file and set the ON? field to 'Y'.

Data Checker

This program will read records in the Academic Records File and report on any problems found. The following error conditions will be reported with regard to the academic records:

> No matching student ID in the Student Database.
> Missing or invalid major code.
> Missing Start or End date.
> Missing or invalid Course Number.
> Invalid Course Section.
> Missing or invalid Term Code.
> Invalid Grade.

A pass will be made of the of the attendance history records to ensure that the related academic records are present. Any 'orphaned' attendance records will be reported. An error zero indicates that attendance exists for an academic record that is no longer present.

Data is only read during this process; no changes are made.

End Of Term Update

This program updates the student database records when a term or semester comes to an end. Most schools, but not all, will need to run this program. An institution that posts a student's entire schedule for the program at the outset might not have to run this program, depending on how you utilize 'terms.'

When executed, a student's current and last terms are modified and the current credits and hours will be updated. If future scheduling had been done prior to running End Of Term Update, it will be recognized as the student's new current term, and the credits and hours of that term will become the student's new current credits and hours.

If you have not input the grades for the term that is ending prior to executing the End Of Term Update, the current credits and hours in the Student Database will not be correct if the student's schedule for next term had been entered. In this case, you will need to run the utility Rebuild Academics to update these data elements.

The ideal time to run the end-of-term process is when the term has ended, the grades are in, and prior to running Automatic Billing for the next term.

The Billing Flag in the student's record is cleared depending upon the set-up options in the Accounts Receivable module. Term-based schools that bill students for tuition each term should have the End-Of-Term program clear the billing flags so students can be billed again when the next term begins.

Erase Grades

This utility will erase the grades in the student academic records for the term selected. Any grade that is flagged with 'N' for Clear Grade (see Grade File) will not be erased.

This program is handy when midterm grades are entered and then need to be erased after printing Midterm Transcripts--so that Skill Grades can be entered for the Final Transcripts. Note that the skill grade and midterm grade are stored in the same data element field.

Hold/Release Schedules

This program is used to change the schedules for one or more students from being 'on hold' to not being 'on-hold' or the opposite. A schedule is placed 'on-hold' when first added if that option has been activated in the Student Records Setup Options file. When 'on-hold', it cannot be printed and the students are not placed on class rosters.

Although a student's schedule might be placed on hold and that student does not appear on the rosters, the seat totals for those courses will still reflect the fact that the student is scheduled into those courses.

This function will change the student's schedule to 'not-on-hold' and the student will be placed on the related class rosters when the Release option is used. When the Hold option is used, the student's schedule will be placed on 'hold' and the student will be removed from rosters.

Purge Edit Journal

This program enables you to remove records from the Schedule Edit Journal. This journal contains adds/drops made to student schedules over time. You can erase records for one or all terms.

Rebuild Records

Choosing this option will transfer you to a menu where data elements of particular data files can be reconstructed as might be required due to power failures, etc.

Rebuild Academics

Often certain elements of data will need to be reconstructed from related historical files. Running this utility program provides that opportunity. Rebuild Academics is also used initially if historical records have been imported from another database–it will update data fields in records related to those that were imported.

Often, an option in this program can be damaging if chosen at the wrong time. For example, if a course's credit hours have changed in your Course Catalog File for the present and future, and you rebuild the past records requesting the credits/hours to match the Course Catalog, you will distort your historical academic records. Ask for **F6** help on each of your options within this utility program.

Rebuild Enrollment Status

This program is used to recalculate the current enrollment status of students. The support file for Enrollment Status for each major is used along with current credits or clock hours for the students.

You can specify which students are to be processed with several prompts that are provided.

> *Rebuild Enrollment Totals.* In the event the enrollment totals are incorrect in the Course Section File, this program can be used to recalculate those totals based upon the schedules and grades for the term or time period requested. Note that archiving a student while he or she is enrolled would cause these totals to be incorrect; you should first delete the student's schedule to avoid having to run this utility.

> This utility can be used to copy the start and end dates from the Term File to records in the Course Section File that have a matching term code. This is sometimes necessary if the course section records were created at a time when the wrong term start and/or end dates were in the Term File.

> *Rebuild Rosters.* At times, a student might be on a roster and shouldn't be, or a student might be missing from a class roster. Or the spelling of a student's name might have changed in the Student Database and the correction needs to be passed on to the rosters. This program will clear out your roster file and rebuild it based upon the current academic records.

> You can rebuild one term or all terms if you do not enter a term code. There is an option to only include students on a roster if they do not have grades. This feature is handy if you prefer to exclude students who might have dropped and currently have a withdrawal grade.

Rebuild Schedules

When a schedule can no longer be found in the Academic Records File and it is in the Schedule Journal Edit showing that it was a schedule That was added and no other records showing it was deleted, you can run this program to re-generate the academic records from the Schedule Journal rather than use Schedule Entry to put the schedule back into the system.

In theory, this utility program should never be necessary, but in the event Academic History Records are deleted in error, this utility can be very useful.

Status Change Utility

With this function, you can select students who will have their current status changed from one code to another. You choose the current status for which to search, and tell the system the status code with which you would like to replace it.

Update Prospective Graduates

This utility can be used to determine which students will graduate upon completion of their current course loads. Once the update has been run, a report can be printed (Student Records/Academic Reports). In addition, several other functions in AS3 can now use this information to process only these students (prospective graduates). The student's 'Prospective Graduate' data element in the Student Database will be set to a Y or N accordingly.

Validate Selection File

This utility program will check an operator's Selection File to make certain the students in that Selection File are still students existing in the Student Database. This situation can arise when an operator is using a Selection File that contains a student who has been archived from the Student Database.

When an invalid entry is found in the Selection File it is removed from the Selection File. The actual data in the Student Database is never altered.

History Files

Under Student Records/Support Files, you will find this menu item. In this window, are entry points to historical transactions that occur with students over time.

Academic Records

These records get created during scheduling or transfer entry. They form the details for printing a transcript. Grades, attendance summary, start and end dates, etc. are stored in the academic records.

Attendance Records

Attendance records are written here as a result of updating the Attendance Journal. Modifications can be made using the History Edit/Make-up function on the Attendance Menu.

Comments

Student comment lines are input here manually. If one or more entries have a term code that matches academic records being printed on the transcript, the one, two, or three comment records will print following that term of academic records on the transcript. Its primary function is to print such things as 'Honor Roll', 'President's List', etc. If you would like to use this file without having the comments show up on the transcript, define a term code in the Term File that will be used for these comments and won't be used for academic records.

Personal Records

A variety of information can be stored in the student's personal records file. The key to the record includes TYPE. The type can be F for family, E for employment, A for academic, or C for church. Since a record number is also available as part of the key, the student can have up to 61 records for each of the above types (1-9, A-Z, and a-z).

The Personal Records File can be accessed as part of Student Entry where the records originate. Refer to the Student Entry program for more information on this topic.

Student Degrees

Records are written here when a student is graduated using Status Entry. These records will print at the head of the transcript.

Status Records

Each time a student receives a new status, a record is written here as an audit trail. Thus, even though a student's current status might change, a complete history of all his or her status changes is maintained by the system. All of a student's status records can be viewed using the Student Status Records program under 'Inquires' from the AS3 menu.

Instructor Grades

This section of the AS3 software enables instructors to define tests, reports, term papers, etc. and average them to obtain a midterm and/or a final grade for each student. The Test ID File can contain items other than tests thus providing the ability to include a grade for things like class attendance, class participation, class behavior, etc.

Each item to be graded during the term or semester can contain a weight determining its value for calculating the midterm grade and/or the final grade. An update program is provided to post the final grade to the permanent records which eliminates the need for grade entry by roster within the Student Records Module.

Support Files

Instructor Grades

Each instructor must first be present in the Instructor File within the Student Records module. Then, in this file, you must define the grades an instructor will be permitted to assign to students during Test Grade Entry. If several, or all, instructors utilize the same grades, you can use the Copy Grades utility after entering the grades for the first instructor to create the necessary records for additional instructors.

Instructor Test ID File

Each instructor and Course Number must first be present in the Instructor File and Course Catalog, respectively, within the Student Records module. Then, in this file, you must define the tests an instructor will grade using Test Grade Entry. If several, or all, instructors utilize the same tests, you can use the Copy Grades utility after entering the tests for the first instructor to create the necessary test records for additional instructors.

It is important to realize that a Test ID need not be a test or exam. You can define codes that mean such things as term papers, classroom attendance, participation in class, etc.

Each grade can count towards a midterm grade and/or a final grade. There are flags in the record for your choice for one or the other or both.

A Test ID being defined can count as a portion of the midterm or final grade. This is achieved by entering the weight of the grade attributed during the averaging process. For example if three tests make up a student's midterm grade and the third test counts twice as much as either of the first two tests, the weights for the three tests would be Test-1: 25%, Test-2: 25%, and Test-3: 50%. It is important that the test weights add up to 100%; otherwise, the averaging program will abort with an error message.

History Files

Records for individual tests taken by students, and midterm and final grades are maintained in the history files. The Update Final Grades program will post the final grade found here to the students' permanent academic records within the Student Records module.

The history files are the source of data for the reports found within the Instructor Grades software.

Midterm/Final Grades

This file will contain one record for each student for each course. When mid-term and/or final grade averaging is done, the respective grade average is written to the record here; if the record is not present, the averaging program will create it.

When the Update Final Grades program is run, the final grade stored in this file is written to the student's permanent record (see Academic Records File).

These records can be removed using the Clear Mid-Term/Final Grades program **after** the final grades have been updated to the student records.

Student Test Grades File

A record is created in this file each time a test grade is added using the Test Grade Entry program. If the record is already present there, the Test Grade Entry program will allow the grade to be changed.

The Student Test Grades File provides the source of input when mid-term or final grade averaging is run.

Records can be removed from this file **after** Final Grade Averaging is completed. The Clear Test Grades program provides the process to clear selected records from this file.

Data Entry

Test Grade Entry

An instructor uses this program to enter the grades for one or more tests. After specifying a Term, Course, Section, and the Test ID, the roster of students will appear on the screen.

Enter a grade that is defined in the Instructor Grade File, for each student. Once all, or some, of the grades have been entered, press **F4** to get to the update prompt; here, you can choose to update your entries or cancel them by responding 'N.'

If the wrong grade was entered in error, simply call up the roster again, and change the grade. You can make changes up until you run the averaging programs. If the averaging programs have been run, to make a grade change, remove the averaged grade (midterm and/or final grade), change the grade in Test Grade Entry, then re-run the averaging program(s).

Midterm Averaging. This program will look at all test grades and students who do not yet have a midterm grade (those who do will be skipped in the averaging process). The test grades for a given instructor and course are averaged together if the Midterm flag in the test record is set to 'Y.' The sum of the grade weights for these grades must sum to 100, otherwise an error message will be generated, and the process will stop.

When the procedure has ended, you can print the midterm grades under the Reports section of Instructor Grades.

Final Grade Averaging. This program will look at all test grades and students who do not yet have a final grade (those who do will be skipped in the averaging process). The test grades for a given instructor and course are averaged together if the Final flag in the test record is set to 'Y.' The sum of the grade weights for these grades must sum to 100, otherwise an error message will be generated, and the process will stop.

When the procedure has ended, you can print the final grades under the Reports section of Instructor Grades.

Utilities

Clear Midterm/Final Grades

This program allows you to selectively clear records in the Midterm/Final Grades File. Records are no longer necessary after the final grades have been updated to the student academic records (see Update Final Grades).

Clear Test Grades File

This program allows you to selectively clear records in the Student Test Grades File. Records are no longer necessary after midterm and final grade averaging have been completed.

Options are available to process specified students, a single course, and/or a single instructor.

Copy Instructor Grades

This program can be used to copy the grades of one instructor to those of another. Since each instructor's grades must be defined in the Instructor Grade File, this utility is convenient when two or more instructors have the same grading system.

An option is included to copy the instructor tests, as well. If you respond 'Y', any test records in the Instructor Test ID File will be copied from one instructor to the other.

Update Final Grades

This program will look to the Midterm/Final Grades File to get a student's final grade for a course. The final grade found there will be written to the student's permanent academic record.

If the student already has a final grade posted to the permanent record, the grade will not be updated again; rather, a note will be printed on an error log report that prints after this update is run.

Reports

Final Grades

This report prints the final grades calculated by the Final Grade Averaging program. You should print and examine this report prior to running the Update Final Grades program.

Midterm Grades

This report prints midterm grades calculated by the Midterm Averaging program.

Student Test Grades

All grades entered through Test Grade Entry can be printed when you run this report.

Accounts Receivable

The purpose of this module is to have the system automatically and/or manually charge students for tuition and fees, and then track the payment history related to those charges. You can create payment plans for students and choose to include interest if you wish. The module produces a student account card which includes transactions from within the Accounts Receivable module, in addition to the others such as Financial Aid, Book Sales, Housing, Library, etc.

Numerous reports are available for you to know exactly where your school stands with regard to its receivables, in addition to your future receivables! You will know which students are past due and can generate letters to them as necessary.

Support Files

Transaction Types

Every transaction in accounts receivable will be coded with a transaction type. This two-character code is defined in the Transaction Type File in the A/R Support Files section.

Following are some examples of transaction codes:

TU   Tuition

TR   Tuition Refund

SP   Student Payment

PL   Pell Disbursement

PR   Pell Refund

LF   Lab Fee

RF   Registration Fee

The advantage of not using the same code for tuition (as in TU above) for all programs is you can track tuition billing by program. The Billing Charges File allows you to specify a different tuition transaction type for every major.

TA   Tuition, Accounting

TC   Tuition, Computer Networking

Put thought into your transaction types. The codes should be logical and easy to remember. Perhaps the first letter of 'T' will always mean tuition for a given major.

Using CR for cash receipt or SP for student payment are codes that will not be forgotten.

Billing Charges

This support file is used to specify tuition and fees by term and program. The Charge Code tells the system how students with a given major are to be charged, e.g., tuition is charged by the term, the credit hour, the program, etc. The Charge Code even provides the option to place the charges in the Course Catalog, the Course Charges File, or the Course Section File. Read the HELP carefully for this field through the use of the **F6** help key.

The transaction types (see above) used for the account card debits and credits are specified in the billing charges record.

The Billing Group field is used to link into the Billing Groups File so that fees and other charges can be posted automatically along with the tuition (for example, registration fee, lab fee, etc.).

Variable Billing File

When tuition charged varies depending upon the number of credits taken by a student, the Variable Billing File is used in addition to the Billing Charges File. The Charge Code of 'L' will tell the software to look into the Variable Billing File for the tuition costs.

Billing Groups

This file is used to set up one or more transactions that will be charged to a student's account when Automatic Billing is executed. Transactions such as lab fees, registration fees, equipment fees, etc. can be posted automatically at the appropriate time. The billing group code is linked to a student by placing the code in the Billing Charges File. The record in the Billing Charges File is in turn linked to a student by term and major.

Charges that are set up in the Billing Group File can be charges that occur only once, or charges that occur every time a student is billed for tuition. You can even specify that a particular charge can be applied x number of times where x can be between 1 and nine.

A charge can be flagged to only be processed if the student's expected graduation date falls within the term for which Automatic Billing is occurring. This is helpful for billing a graduation fee during a student's last term of enrollment. Set the 'Grad This Term' field to 'Y' to accomplish this.

Charge Codes

This file defines a code that can optionally be used to charge students for something outside of the normal tuition and fees. For example if only some students will be charged for a meal plan or a parking space, define the code here, place the code in the student's record (Student Entry / Financial), then run the Automatic Billing program to debit the student account cards.

Course Charges

This file lets you charge not only by the course, but to 'grandfather' the charge amounts through the use of an effective date. The charge code in the Billing Charges File will tell the system you wish to do billing in this manner (Charge Code of 'X').

The effective date is matched with a student's date of enrollment to find the appropriate charges in this file. A search is made for a charge record with an effective date prior to or equal to the student's date of enrollment. If the <u>first</u> record in the file has an effective date in the future of the student's enrollment date, it will be used even though an older record cannot be found (this allows you to bring up the system without putting in records with old, arbitrary dates just to satisfy the software's need).

If the Course Number cannot be found in this table, the system will then look in the Course Catalog File for the charges when the charge code is an 'X'.

Active Payment Plans

This support file must contain the term codes for which you are currently posting student payment plan payments.

Data Entry

Automatic Billing

Once a student has been enrolled, you might be ready to run the Automatic Billing program to post the tuition and other charges; this will depend upon how you have chosen your set-up options in the A/R Support Files section. In most cases, the student must have a schedule, and if this has been done, launch the Automatic Billing function and specify the group to be billed. Typically, the only prompt to which you must respond is the Term Code. The program will determine who needs to be billed and how much to charge their accounts.

When you enter the Automatic Billing program, as you move through the prompts, use the **F6** key to read the description for each option. The Special Billing options are used in rare cases; thus you can probably skip over them.

When the job completes, it will report the number that was billed. One or more records per student will be posted to the Billing Edit File, depending upon your A/R setup. The Billing Journal prints records present in the Billing Edit File.

> **Example Set-Up**: Following is one of several ways Automatic Billing can be used to charge students for several transactions simultaneously:
>
> *Student Records*
>
> 1. Add a record to the term file for the session being scheduled.
>
> 2. Add a record to the major file.
>
> 3. Add a course to the Course Catalog File. Specify an amount for lab fees for this course.
>
> 4. Add a record to the Course Section File for the course and term defined above.
>
> 5. Schedule your student into the course you created at the outset.

Accounts Receivable

1. Add a transaction type for tuition billing in the Transaction Type File. The 'Set Billing Flag' field should contain a 'Y'. Also, add two additional records: LF for lab fees and SA for student activity fee.

2. Add a record to the Billing Group File. The group code can be any two-character code such as '01'. The Trans Type will be SA for student activity fee. Enter an old date for the effective date such as 010190 (the purpose of the date field is to "grandfather" charges with enrollment agreements). Record 01 should be in field four.

Place the amount of the fee in field five.

If the amount depends upon the credits in which the student has enrolled, here is an example how that would be handled (otherwise skip fields 8-13):

Place a "C" in field eight indicating the charge is based upon credits.

Place an "R" in the CUR/CUM TYPE field for current credits.

Put the minimum credits for this charge in field 10 and the maximum in field 11.

Put an A for attempted in field 12.

Put an L for flat fee in field 13.

Add the record, then add another record with the record number being a 2 instead of 1. This time, the amount would be different as would the minimum and maximum hours. Having two records in this example allows you to charge two different amounts depending upon the number of credits in which the student enrolls.

3. Add a record to the Billing Charges File for the term and major. Use a charge code of T to debit the account card with one tuition charge for the term. Place the amount to be billed in field four and the transaction type in field six.

The Billing Group would be that which you defined in the above step.

4. Run the Automatic Billing program and specify the Term Code you used when you scheduled your student. Under Special Billing, place the LF you created for lab fees and a 'Y' for Course Catalog. When done, the Billing Journal should print three transactions: one for the tuition charge, one for the lab fee, and one for the student activity fee.

Billing & Adjustments

This program can be used to post transactions to the student's account card. Records entered will reside in the Billing Edit File until the Billing Journal is printed and updated.

If you do not prefer to use Automatic Billing to post charges to a student's account, you can use this manual function instead.

This program is designed for batch entry. Enter the batch data elements in the upper portion of the screen (date, term, default comment). The transactions for the students are input on the lower portion of the screen.

You can move money from the school's A/R student ledger to a "private" student trust account ledger by utilizing a transaction type code that has the Student Trust Account flag set to 'Y' (see Transaction Type File in the A/R Support Files). When the Billing Journal is run and updated, the transaction is posted to both the school's student A/R and the student trust account (a debit to one and a credit to the other). You can reverse the entry by entering the transaction again, but using a negative dollar amount. A student's trust account can be printed from the A/R Reports menu.

Billing Edit

Entries made using Billing & Adjustments or Automatic Billing can be modified through the use of this process. You can delete an entire entry (row) by pressing Shift/Delete while stationed on that row. Other software modules will also post records to this file: Housing, Financial Aid, Book Sales, etc.

Billing Journal

This report prints all entries sitting in the Billing Edit File. After printing, you will have the option to update the transactions to the student account cards.

Cash Receipts

This program can be used to post transactions to the student's account card. Records entered will reside in the Cash Edit File until the Cash Journal is printed and updated.

This program is designed for batch entry. Enter the batch data elements in the upper portion of the screen (date, term, default comment). The transactions for the students are input on the lower portion of the screen.

If a student is making a payment towards his or her payment plan, be sure to reply 'Y' to the 'Apply To Payment Plan?' prompt. The full amount of the payment will be applied to the oldest payment of the student's payment plan. If the amount is greater than a single payment, the oldest payment will be 'paid off' and the balance will be applied to the next payment of the plan.

It is possible to post a cash receipt to the Cash Journal while at the same time post a related debit to the Billing Journal. The Transaction Type File allows you to flag a transaction type with this special power (refer to data element Debit & Credit Trans).   The debit transaction type that will be used to post to the Billing Journal is defined in that same transaction type record in the field entitled Debit Transaction. A case in which this feature might be used is an over-the-counter sale or a Registration Fee.

Cash Edit

Entries made using Cash Receipts can be modified through the use of this process. You can delete an entire entry (row) by pressing Shift/Delete while stationed on that row.

Cash Journal

This report prints all entries sitting in the Cash Edit File. After printing, you will have the option to update the transactions to the student account cards.

Notes Entry

Student notes related to the Business Office can be entered using this selection. Notes can be viewed on the screen by going back into the Notes Entry program. Also, you can elect to have the notes print on the student's Account Card (Statement) by placing a 'Y' in the appropriated field during Notes Entry.

Personal Notes Entry

This version of taking notes allows you to specify a security level with each note you take for a student; the levels are 0 through 9 with level 9 being the most secure.

 Each operator using AS3 can be assigned a level (see System Administrator) which is directly related to the ability to view notes. An operator cannot view notes that have a level greater than that of the operator. For example, if the operator's level for note viewing is set to 5, that operator cannot view notes that have a security level of 6, 7, 8, or 9 (only levels 0 through 5 can be viewed).

To input notes, optionally press **ENTER** for the date and time. Press **ENTER** when positioned at the 'Notes' data field; the note-taking window will then open. When you have completed your entry, press **F4**. Your options will be as follows:

> Y - Save and exit notes window.
>
> N - Do not save and exit notes window.
>
> S - Save your entry and continue taking notes.

Payment Plan Entry

Through the use of this program, you can create a payment plan for a student. Payment plans belong to a term, but if the plan is for the life of the student, you can use a generic term code such as '00000000' (eight zeros) or any other non-academic term code you create in the Term File.

If you are charging interest, enter the interest percentage and the system will calculate the principal and interest for you. The payment plan can be printed from this entry screen or you can run them in batch using the Payment Plan Invoices on the reports menu.

Student Information

This screen provides access to some of the student's A/R codes such as the Billing Flag, Delinquent Flag, financial aid status, etc. It is provided in the event you must make an adjustment to one of these codes.

The Delinquent Flag field will contain the letter D if the student was considered delinquent by the Payment Plan Summary Report. If the student has any portion of a payment past due he or she is considered delinquent and the flag will be set if requested so by the operator when the program is run.

Tickle Date Entry

Here you can track the next date you need to contact a student for whatever the reason. Students will be listed from the oldest tickle date to the most recent. When a student is added to the system, the default tickle date of 12/31/2050 is posted automatically; needless to say, this tickle date causes the student to go to the end of the tickle date list.

Build Selection File

This program will build an operator's Selection File based on the parameters selected. The Selection File will always be number 99 in this situation (see Selection Files under Data Entry Hints). At the outset, you can choose to erase the existing Selection File or not; if you don't, you will be adding individuals to those already present in the file.

If you would like to know who has been placed in the Selection File, use your hot key (CTRL/P) to get you to the entry point for managing Selection Files. Call up Selection File #99 and use the **F3** key to print the file when at the 'Options OK' data element.

A key feature of this function is that you can find students who had one or more transactions between two dates you request. You also have the option to retrieve students who had no transactions within the date range. Another useful capability is that the program can find students who have credit balances, or only students with debit balances. You can choose to find students who have their Delinquent Flag set (this can be set manually, or by the Payment Plan Summary Report).

To check what Selection Files have been created, use your **F2** key to do a look-up when in field one Operator Code. The list that appears will begin with your operator code; however, you can scroll up and down through all the Selection Files for all the operators and make any choice.

Since when the system creates a selection file for you it is always numbered 99, you can preserve it by copying the selection file to a new number. Place the copy-to number in the Copy To field to accomplish this.

Import A/R Transactions

You can post accounts receivable transactions to your AS3 A/R system by running this program. The data must be organized in a flat ASCII file as shown in the following format. Each record must have a length of 65 bytes. Also, the first record in the file must contain the number of records in the file and must have a record length of 65 too.

	Data Element	Length	Position in Record	Comment
1	TRANSACTION DATE	8	1-8	MMDDYYYY
2	TRANSACTION TYPE	2	9-10	AR Tran Type
3	STUDENT ID	9	11-19	
4	TERM CODE	8	20-27	
5	AMOUNT	10	28-37	XXXXXX.XX-
6	TAX	6.2	38-43	XX.XX-
7	COMMENT	20	44-63	For account card
8	CARRIAGE RETURN	1	64-64	Record Terminator
9	LINE FEED	1	65-65	Record Terminator

After importing A/R transactions, you will have to run the Build Student Balances program found on the AR / UTILITIES Menu.

1098 Electronic Filing

Under certain circumstances, the IRS requires you to file your 1098's electronically. The 1098 menu found under AR / SUPPORT FILES will provide you with some of the tools needed to fulfill this requirement. Also, refer to the 1098 Forms Report on the Accounts Receivable / Reports Menu for step-by-step instructions.

A Payer Record

The shell of this record will be first created when you print your 1098's. You will then be required to use this entry program (under Change Mode) to make additional entries.

B Payer Records

There will be one record per student. These records are created automatically during the print process.

C Payer Record

This single record is created automatically during the print process.

F End Of File Record

This single record is created automatically during the print process.

T Transmitter Record

The shell of this record will be first created when you print your 1098's. You will then be required to use this entry program (under Change Mode) to make additional entries.

View Payee Records

This view provides a look at the records prepared for download to the IRS. Add/Change/Delete to records is permitted.

Write 1098 Records

This process will write the records collected by running the 1098 Forms Report to an ASCII file which can then be transferred to the IRS.

When you execute the program, the name of the file created will be 1098Txxx where xxx is your campus code (e.g., 1098T100).

You will be able to find this file in the following folder on most systems: Z\1\FILES\USR or Z\FILES\USR after the process has been completed.

Tuition Adjustments

From this menu, you can enter refund amounts and print checks to students. When the checks are printed and updated, the transactions are written to the A/R Billing Journal. After printing and updating the Billing Journal, the student account cards will be debited with the check amounts.

Check Entry

This program enables you to select the student and the amount of the refund. Other data elements will be requested such as a reference number, comment, and transaction type.

Edit Checks

The entries made using Check Entry can be examined on this screen. You can change or delete any item. Use the shift/delete key (or CTRL/D on some systems) to delete a check.

Edit File Listing

You can print the contents of the Edit Checks File by executing this program. Note that check numbers and check dates will not become part of the data until you run the Print Checks program.

Print Checks

This program is used to print the checks that have been input using Check Entry. The checks will print on a laser printer and require the same check used by Thoroughbred's Solution-IV Accounts Payable System. The checks are available from Universal Datatech (800-310-6288).

Register / Update

The Check Register prints the entries present in the Edit Checks File. A check record without a check number will not be printed or updated; thus, you are required to go through the check print process (which creates and posts the check numbers). When you update the register, the transactions are written to the A/R Billing Journal (see the Billing Edit File and Billing Journal).

Once you print and update the A/R Billing Journal, the transactions will be posted to the A/R Student Account Cards (the amount of each check will result in a debit to the student's ledger).

The update will also post the transactions to the Monthly Check File from which the Monthly Check Register is printed.

Monthly Check Register

When the Register/Update program is executed and updated, transactions are written to a history file from which you can print the checks between two dates selected. The report is ordered by check number, and can be used to reconcile the bank account at the end of the month.

Collections

From the Collections menu, you can track the collection agency(s) used by your institution. You can also track which students have been turned over to collections.

Agency File

Enter the agency or agencies used by your school.

Collections File

When a student is turned over to collections, make an entry in this file. Adding the record will set the Legal Code to L in the student database (for the Legal Code, see AR / Data Entry / Student Information).

Agency Report

This report will print students in the Collections File. The amount that was turned over to collections will print along with the name of the collection agency. You can select one agency or run the report for all collection agencies.

Utilities

The utility programs enable you to take corrective action if necessary.

Build Student Balances

This program will sum the transactions for a student and write the total (current balance) to the student database record. Typically, the system maintains a student's balance automatically; however, due to power failures and other reasons for system crashes, the current balance can get out of sync with the students' actual transactions. Running this program will correct that situation. You can run the utility for one student or all students.

Clear/Set Billing Flags

Every student has a billing flag which indicates whether or not that student has been billed for tuition. A student cannot be billed by the Automatic Billing program if his or her flag is set to 'Y'. Occasionally, the need might arise to clear or set the billing flags for all or some students. Note that the End Of Term program in Student Records will clear the billing flags for you; however, this automatic clearing of the flags can be disabled in the Set-Up Options of Accounts Receivable / Support Files.

Clear/Set Delinquent Flags

This program provides the ability to edit delinquent flags for groups of students. You can choose to clear the delinquent flags or set them.

If you choose a single term code, the student must have a current term that matches the one you enter, otherwise, the student will be skipped.

Delinquent flags can be set based upon a student being overdue on his or her payment plan. There is an option when you run the Payment Plan Summary Report.

Copy/Purge Billing Charges

The Billing Charges File requires records for each term in which the school will have accounting activity. Since the charges do not change every term, it is easier to copy the records from a previous term than to enter new records. This program will ask for the term you are creating and the term from which you are copying. If records already exist for the new term, they will be overwritten if you re-run the job.

You can also use this utility to remove records from the Billing Charges File for a term selected. It is suggested that you do not remove any records that might be needed for historical purposes or making refunds.

Data Checker

This program will read records in the A/R File and report any problems found. The following error conditions will be reported:

No matching student ID in the Student Database.

Invalid transaction date.

Missing or invalid transaction type.

Invalid transaction number.

Missing or invalid Term Code.

Data is only read during this process; no changes are made.

Delete Payment Plans

If and when it is desirable to remove unnecessary payment plans from the system, this program can be used for that purpose. Records are removed from both the Payment Plan File and the Student Payment Records File for a term selected by the operator. If a student has no additional payment plan records in the system after his payment plan is deleted for the term requested, the Payment Plan flag in the Student Database will be reset to 'N'.

Reset Billing Journal

This utility will erase all entries in the Billing Edit File. This might become necessary if the entries that have been posted are incorrect and you wish to delete them and begin the posting cycle again. An option is included to simultaneously reset the billing flags of the students in the file to 'N'.

Instead of running this utility to erase all entries in the journal, you can use the edit function under A/R Data Entry to manually remove records.

Update Net Balance

The student's net balance will be found on the Student Information screen under ACCOUNTS RECEIVABLE / DATA ENTRY. The definition of the net balance is as follows:

Current Balance + Unbilled Tuition - Unapplied Financial Aid

During an Account Card Inquiry, the net balance is calculated and, thus, is a real number for that point in time. However, the net balance on the Student Information screen is only updated and accurate when you run this Update Net Balance function. The purpose is to provide a data element for reporting purposes.

Reports

On the Accounts Receivable/Reports menu, you can experiment with the various reports available. Following are summaries of a few of the key A/R reports.

A/R Aged Trial Balance Report

The Aged Trial Balance Report is used to print student balances aged by days. Credit transactions are aged with the oldest outstanding debits. If you choose to print details, the individual student transactions will be included; otherwise, only one summary total line per student will be printed. This report can be run for one or more campuses (see Campus Group Code).

Earnings Report

This report sums the transactions related to tuition billing. Transaction types flagged as TUITION=Y are added together to determine how much of a student's charges should be earned over the months of the program in which the student is enrolled.

The report will show what was earned in previous months, the earned amount for the current month, and the deferred tuition to be earned in the future.

The number of months of earning will be those between a student's start date and his expected grad date. If no expected grad date is found for the student, the number of months will be retrieved from the Major File. A full month of earned tuition will occur if the student is enrolled for any portion of that month

If you neglect to run and update the Earnings Report during a given month, running it the next month will result in earnings for both months being included.

Financial Gap Report

This report calculates the charges for a student for a given term. It will then subtract from that total financial aid awarded the student, a payment plan that might have been entered for the student, and any cash payments made for the period.

The net balance will be the financial gap (debit or credit) for the student. If there is no gap, the student will not be reported.

Cash paid by the student will be given a code of "CASH" for the fund type. If the student has a payment plan, the fund type will be labeled "PLAN". Billing transactions, such as tuition and fees, will not have a fund type. When you set up your financial aid module, you should not use PLAN or CASH as a fund type; otherwise, the report's output would be confusing.

Funds Aging Report

This program reports funds that are scheduled to be received by the school for the time period requested. Aging will occur for current, over-30, over-60, over-90, and over-120 days into the future. The funds that will appear on the report will be those defined in your Fund Code File, for example, PELL, STAFFORD, etc. In addition, student payment plans will automatically be included. You can request details; otherwise, a summary report will be printed.

G/L Transactions Report

This report prints accounts receivable transactions that fall between two dates you choose. The output groups the transactions by General Ledger Chart of Account Number, then date, then A/R Transaction Type. The chart of account numbers must be entered in the Transaction Type File -GL which will be found in the A/R Support Files section.

Payment Plan Invoices

You can print payment plans for students which will fit in a standard windowed envelope for mailing. If the payment plans to be printed are for different terms, do not enter a term code when you run the program, but you will have to enter the terms in the Payment Plan Active file and mark those terms to be printed as active (see AR / Support Files).

To print the entire payment plan for students, enter a date far in the future such as 12/31/20. Otherwise, if you only want to include line items up to and including the current month, place the month-end date in the Cutoff Date field.

You can have the invoices addressed to the student's sponsor by placing a sponsor code in the student's record. You must also place an 'I' or 'B' in the Sponsor Address field. This is done under Student Records / Data Entry / Student Entry / Financial or under Accounts Receivable / Data Entry / Student Information.

Payment Plan Summary

Summary totals are provided by student for the following categories: payments made, payments not made, overdue payments, and total payments. You will have the option to set a student's delinquent flag to 'D' if the student missed a portion of one or more payments (the due date of the payment is compared to your computer's current date). You can see a student's Delinquent Flag in Student Entry / Financial or AR / Student Information.

Statements

Student Statements can be printed at any time and will include transactions posted up to and including the cutoff date you request. If you do not specify a cutoff date, all transactions will be printed.

If you request transactions for a particular term, first a balance prior to the term entered will be printed, the transactions for that term will follow.

You can add a 60-character text line at the foot of the statement and/or you can specify a block of text to print at the end of the statement. The text block is entered in the following area:

SYSTEM ADMINISTRATOR / SUPPORT FILES / TEXT OPTIONS

There are several versions of the statement available. Under the A/R SetUp Options, you can choose which statement format you prefer. Here, you may also choose if the unapplied financial aid transactions are to print in the heading of the statement; if you choose not to print them, only the total unapplied financial aid will be printed (no transactions).

You can have the statements addressed to the student's sponsor by placing a sponsor code in the student's record. You must also place an 'S' or 'B' in the Sponsor Address field. This is done under Student Records / Data Entry / Student Entry / Financial or under Accounts Receivable / Data Entry / Student Information.

Student Transactions Report

This report will request a start and end date. All students with transactions within the date range will be included.

The detail lines will be first sorted by student. A total will be provided for each student.

An optional group code can be requested. The Transaction Type File allows you to add a group code to the transaction types. Thus, you can optionally extract only transactions of a particular group.

Summary by Type

This report summarizes all A/R transactions in the database. You must enter a starting year and month and an ending year and month (maximum of one year). For the date range you choose, the transactions will be totaled by transaction type for each month. Transactions prior and after the date range selected will be totaled as 'prior and after transactions.'

Transaction Summary Report

This report sorts student transactions by transaction type and then reports a single total line for each student for that transaction type.

Subtotals are provided for each transaction type and then a grand total is printed for all transactions.

Tuition Edit Report

This report prints the tuition due based upon your billing set-up. If you use the Billing Group File for posting additional charges, these transactions will also be printed. The program will look at the charges that have been posted to the student's account for tuition. It will then look at the set-up files for the billing charges and determine what should have been billed. If a discrepancy is found, it will be reported.

1098-T Forms

This selection will print 1098T forms on a laser printer.

Call AlaQuest to get information regarding the correct form to purchase.

Transactions 'flagged' as 1098 in the A/R Transactions Types File which have a date within the range of what is requested will be summed for the student.

The Personal Records extension of Student Entry enables you to print the 1098 form to someone other than the student.

As the forms are printed, they are also written to a data file from which you can create an ASCII file to electronically file with the IRS. Follow these steps to file electronically:

1. Print the forms to screen or paper.

2. Go to the 1098 menu:

   Accounts Receivable / Support Files / 1098 Files.

3. Finish filling out the A Payer Record, the B Payer Record, the C Payer Record and the T Transmitter Record.

4. Optionally view the B Payer Records.

5. Write 1098 Records. The ASCII file created will be named 1098Txxx, where 'xxx' is your campus code. This file will be found in your FILES/USR folder and should be ready to transmit to the IRS.

1098 Corrections

Build a Selection File (see Input Selection File) containing the students for whom you need to submit a corrected 1098 form. When you run the 1098 Forms Report, place a 'Y' in the CORRECTED field. This will tell the report to place an 'X' in the "Corrected" box on the form. In the PROCESS BY field, place an 'I' and then choose your Selection File containing the group of students requiring the corrected forms.

Correspondence

Refer to the correspondence documentation under the heading of
Prospect Tracking. All correspondence modules in AS3 operate in a
similar fashion; however, there are no Pending Letters in this module.
The A/R Build Correspondence File program offers the options to find
students with their delinquent flag set. Of the many other options, you
can also pick students with credit or debit balances.

Financial Aid

The purpose of this module is to track expected financial aid disbursements and financial aid payments within the student accounts. The system allows you to define the types of financial aid available whether they are local, state, federal, or other. Both the expected disbursements and the actual payments are integrated with the AS3 Accounts Receivable module thus allowing this information to flow through to the student account card, Funds Aging Report, Student Statements, etc.

Data Entry

Student Award Year

For a student to receive financial aid via the AS3 software, he or she will need a record in this file for each financial aid award year for which disbursements will be made to that student. For users of EdExpress and FAME, these records can be imported from the servicer.

The financial aid module can function with only the first two data elements of the file populated; however, some of the disbursement controls will not be available when disbursing funds; this may, or may not, be a concern, depending upon your procedures and how you are using the software.

When running Automatic Disbursements, some of the fields in the Student Award Year record are checked to see if they pass certain tests. These tests can be turned on or off in the Disbursements Control File (see F/A Support Files).

Check File

This table is used to track the source of funds for a given term and fund code by a check number. The Disbursements by Check Report will print the students who received funds from this check.

For example, check number 1001 might be a check containing the Pell funds for students enrolled for term 2003A. A student's disbursement becomes related to this check through the Packaging Screen via the data elements Fund Code and Disburse Term.

Packaging

From this screen you can enter grants and loans. Enter the student ID and, optionally, a term code and/or a block code.

Term. If you enter a term code, only records previously entered for that term will appear on the packaging screen.

Block. If you enter a block code, the packaging records predefined for that block will be retrieved from the Packaging Block File and added to the packaging screen for that student.

Entering a Disbursement. Each row of the 'packaging matrix' consists of one disbursement of an award. Enter the award year, fund code, and award number. An award number breaks down into one or more disbursements of that award; for example, award number one of a Pell award might consist of three disbursements (01, 02, and 03).

Note that the key to the record in the Packaging File comprises five data elements. To create three disbursements of the same award, the first four fields will be the same (you will only have to press **ENTER** on each of these four fields when creating the second and third disbursements–the information will be repeated for you). Exception: when the cursor gets to the Award Number field, the computer will look for prior awards for this student and the Award Number will be incremented by one; thus, the default for this field is calculated by the computer. In many cases, this feature is desired (e.g., putting in awards for a student sometime in the future); however, often you will need to type over this calculated default data element (see Set-Up Options under Financial Aid / Support Files to turn this feature off).

Enter the disbursement amount and term of disbursement. The dates from the Term File will be retrieved for you automatically; if they are correct, you are done adding the disbursement–otherwise, adjust the dates. Note the data element Disbursement Days in the Fund Code File. If a number is present in that field, that number of days will be added to the term start date to produce the Expected Disbursement Date. For example if the term starts on 3/1/2009 and 30 is in the Disbursement Days field for Pell, a Pell disbursement for the 3/1/2009 term will have an Expected Disbursement Date of 3/31/2009.

Keep in mind that you are not required to utilize academic term codes in financial aid. You can create term codes with dates that mirror a fiscal year or an award year. This will depend upon the institution and how the programs are designed.

In the case of a loan (such as Stafford), there are additional fields to be populated on this entry screen. Enter the loan number. Then enter the bank and/or guarantor.

If you have a fees percentage in the bank and/or guarantor file, the fees for the disbursement will be calculated automatically by adding the two percentages together and then taking that resulting percentage of the disbursement amount.

If fees are set up to be calculated automatically, it will be done for each disbursement of the loan. If you don't populate the fee percentages in the bank and guarantor file, you can input the fees amount manually.

Certified: You can use this field to specify which disbursements are to be released during the Automatic Disbursements procedure. This date field can be useful for selecting transactions to pay or it can be ignored.

Signed: An information-only field if you need to track that a student has signed a related document.

Notes Entry

Student notes related to financial aid can be entered using this selection. Notes can be viewed on the screen by going back into the Notes Entry program.

Press **ENTER** when positioned at the 'Notes' data field; the note-taking window will then open.

When you have completed your entry, press **F4**. Your options will be as follows:

    Y - Save and exit notes window.

    N - Do not save and exit notes window.

    S - Save your entry and continue taking notes.

Personal Notes Entry

This version of taking notes allows you to specify a security level with each note you take for a student; the levels are 0 through 9 with level 9 being the most secure.

Each operator using AS3 can be assigned a level (see System Administrator) which is directly related to the ability to view notes. An operator cannot view notes that have a level greater than that of the operator. For example, if the operator's level for note viewing is set to 5, that operator cannot view notes that have a security level of 6, 7, 8, or 9 (only levels 0 through 5 can be viewed).

To input notes, optionally press **ENTER** for the date and time. Press **ENTER** when positioned at the 'Notes' data field; the note-taking window will then open. When you have completed your entry, press **F4**. Your options will be as follows:

    Y - Save and exit notes window.

    N - Do not save and exit notes window.

    S - Save your entry and continue taking notes.

Account Card

From the Inquiries menu, choose the Account Card Inquiry. Note there is a cutoff date for financial aid disbursements; disbursements up to and including that date will appear. Enter a date and then see that your entries appear on the first pop-up window (disbursements). At this point, these awards will be included on the Unpaid Awards Report (Financial Aid/Reports menu). In addition, the loans should appear on the Outstanding Checks Report.

Loan Check Receipt

When a loan check is received, you must tell the system it has come in. From the Accounts Receivable/Data Entry/Fin Aid Disbursements menu, select the Loan Check Receipts program. After entering your student, fund, and loan number, indicate the date received for the disbursement in question. If the fees have changed, make the entry in the field provided. The requirement to run this procedure can be disabled under the Financial Aid / Support Files / Set-Up Options.

Automatic Disbursements

Disbursing funds is done within the Accounts Receivable module. Go to the Accounts Receivable/Data Entry/Fin Aid Disbursements menu. Run the Automatic Disbursements program.

When the students have been processed, you will receive one or two reports. The first report will indicate any disbursements that will not be made because they did not pass the tests indicated by you in the Disbursements Control File. Note that you can force these to be disbursed by going into Packaging and calling up the disbursement and placing a 'Y' in the Override Hold field; when you run Automatic Disbursements again, this disbursement will be processed. (If there are not disbursements held up, the report will not print).

The second report that follows will include all disbursements that have passed your criteria in the Disbursements Control File. (If there are none, the report will not print). Disbursements that print on this report are not automatically passed to the student account card. The records are temporarily stored in the Payments File. You must run and update the Payments Journal to post these disbursements to the student's account card; at that point, they will be removed from the Payments File and moved to the historical payment transactions under the financial aid support files history section.

Payments Journal

This report and update will transfer your disbursements from the Payments File to the Student Account Card as payments. The records are also moved from the Payments File to the Payment Transactions File in the Financial Aid/Support Files/History section.

In the Fund Code File, if the flag to print receipts is set to 'Y' for the fund being processed, Student Receipts will print prior to the journal. Each receipt will be printed on a separate sheet of paper.

Refund Entry

This function is used to recover funds from the student. When the cursor is at the Award Number field, you can press **F2** to search for transactions for the award year and fund selected that are eligible for refund. To be eligible, part or all of the disbursement must have been paid to the student account.

After retrieving the disbursement, enter the amount to be refunded. The amount you enter will be posted to the Refund Due From Account field on the packaging screen and will be placed in the Payments File until you run the Refund Journal.

If you make an error in the amount of the refund and you have already responded 'Y' to update the entry (and you have not updated the Refund Journal yet), you can re-run the entry program and input a negative amount for the refund–this will remove the refund due from the packaging screen; but, it will not remove the record that was written to the Payments File. Go into the Payments File and delete the line that was created in error (or modify the amount if you didn't reverse the entire refund).

Refund Journal

This report and update will transfer your refunds from the Payments File to the Student Account Card as refunds. The records are also moved from the Payments File to the Payment Transactions File in the Financial Aid/Support Files/History section.

Reports

Award Letters

You can print the award letter from the Financial Aid/Reports menu. You can choose a single award year or print the award letter for all award years. One or more funds can be included on the letter. You can print for a single student or for a range of students by name. AS3 has more than one format available for the Award Letter; you can choose your format on the Financial Aid / Support Files / Setup Support Files Menu by choosing Set-Up Options.

When the print job has completed, you will be asked if you would like to update the award letters. If you respond Y, the current date will be written to the Award Letter Date field of the Packaging Screen (Disbursements File).

You will have the option to print an award letter for a single student during the Packaging process on the Financial Aid / Data Entry Menu; however, this feature requires you Thoroughbred Database Manager to be level 8.51 or greater.

Clock Hour Report

This report will print a student's hours scheduled, present hours, and absent hours. If a student has met the midpoint and/or the 3/4 point of the program, a 'Y' will appear in the appropriate column.

After printing the student's hours, the unpaid financial aid disbursements will follow. Included in the grand totals, is a breakdown of the future disbursements by fund code.

Disbursements by Check Report

Through the use of the Check File in Financial Aid, disbursements can be related to a given check. When the report is run, packaging records with a disbursement term and fund code that matches the check in the Check File will be reported with that check.

FISAP Information Report

This report will print some of the data you will need to make your annual FISAP report. You will need to only enter the financial aid award year.

Financial Aid Tracking Report

This report extracts information from the Student Award Year File, the Student Interview File, and the Student Database File. The purpose of the report is to provide feedback on a student's progress through the financial aid process.

Interview Schedules

Interviews can scheduled for the Financial Aid Department by placing an F in the Interview Type field during Interview Entry. The interview schedules can be printed for a selected range of dates. The output will be sorted by date and time of day.

Outstanding Checks Report

Any disbursement checks not yet received for students are printed on this report.

Payments Report

This report prints information on disbursements made through financial aid to the students' accounts. You can enter an award year to restrict processing to that award year, or you can leave the award year blank and print transactions for multiple award years; in the latter case, the date range will allow you to restrict processing to a selected period of time.

Unpaid Awards

This report prints awards that have been entered for students but have not yet been disbursed.

History Files

Disbursements

From this screen you can examine grants and loans. Enter the student ID, award year, fund code, and award number. An award number breaks down into one or more disbursements of that award; for example, award number one of a Pell award might consist of three disbursements (01, 02, and 03).

Note that the key to the record in the Disbursements File comprises five data elements. For two or three disbursements of the same award, the first four fields will be the same (you will only have to press **ENTER** on each of these four fields when retrieving the second and third disbursements–the information will be repeated for you). Exception: when the cursor gets to the Award Number field, the computer will look for prior awards for this student and the Award Number will be incremented by one; thus, the default for this field is calculated by the computer. In many cases, this feature is desired (e.g., putting in awards for a student sometime in the future); however, often you will need to type over this calculated default data element. Note that this feature of calculating the Award Number can be turned off under the Set-Up Options of Financial Aid.

For older versions of Thoroughbred (8.42 and 8.50) this file is used for Packaging and will be found in the Data Entry section of Financial Aid.

Payment Transactions

This data file contains the transactions that have passed through the Financial Aid module and which have been disbursed to the student account cards.

Student Loans

Stored here are the loan records for students. The amount of the loan, the disbursement amounts, fees, and dates the checks were received will be found in each loan record.

Utilities

The utility programs enable you to take corrective action if necessary.

Data Checker

This utility program will read records in the F/A files and report on any problems found. The following error conditions will be reported:

> No matching student ID in the Student Database.
> Invalid expected disbursement date.
>
> Missing or invalid term Code.
>
> Missing or invalid fund Code.
>
> Invalid award year.
>
> Missing related loan record.

Data is only read during this process; no changes are made.

Default Management

This software package allows you to automatically generate letters to students when the students separate from school.

The Letters File is pre-loaded with several letters which can be initiated after so many days pass following the graduation or withdrawal from school. The system also allows you to generate one or more letters a number of days prior to separation from school.

You will have the capability to add, change, or delete letters, and to modify the frequency of the letters.

The system provides a means of automatically extracting data from the Student Records and Financial Aid modules, therefore, minimizing data entry.

Support Files

Guarantor File

The Guarantor File defines financial aid loan guarantor agencies. Before you can utilize a code to represent a guarantor agency, you must have a record present in this file.

This support file is shared by the Financial Aid Module.

Servicer File

This file is used to define any servicer that will be used to service the loan. Each loan can have a servicer code associated with it, and that code is defined in this file.

Data Entry

Student File

Maintenance of the Student File is done on this screen. Records are placed here automatically when a student separates from school if he or she had one or more Financial Aid loans.

Once a student has been selected, you can choose the area of inquiry:

Demographics, Loans, Personal Information, References, or ID picture.

To delete records from the Student File, use the Purge Students program on the Default Management Utilities Menu after setting the 'OK To Purge' field in this file to 'Y'.

Notes Entry

This screen allows you to enter notes. Press **ENTER** when positioned at the 'Notes' data field; the note-taking window will then open.

When you have completed your entry, press **F4**. Your options will be as follows:

   Y - Save and exit notes window.

   N - Do not save and exit notes window.

S - Save your entry and continue taking notes.

Correspondence

This part of the Default Management software module is used to generate letters to students prior to or following their separation from school. Several letters are pre-defined and can be used in their current form or they can be modified as needed. Also, you can add or delete additional letters to the system.

Refer to the correspondence documentation under the heading of Prospect Tracking. All correspondence modules in AS3 operate in the same fashion with the exception of the following features present in this module:

Letter Group File

This file enables you to group letters together for the purpose of generating one or more letters for a student when a student separates from school (drops or graduates). Events are defined in the Document Tracking module and include such things as withdrawal, graduation, etc. Only the WITHDRAW and GRADUATE events are used by the Default Management software module.

In this file, you specify the codes that identify the letters you created using the Enter Letters program. You link one or more letters to a Letter Group by adding records in this file. For example, if two letters are to generated when an individual graduates, the Letter Group might be 'G' for both letters but the Letter Code would be different in each case to identify each letter.

The number of days will indicate when the letters will be generated. You can have letters sent a number of days prior to an event date (place a minus sign prior to the days you enter), or a number of days following an event date. You specify the date using the Date Type field found in the record; for example, a date type of 'G' tells the computer your letters are to be generated 'x' days before or after the student's graduation date.

Note that the Withdraw and Graduate Events can cause letters to be generated in the Default Management System and the Student Records System and that each of the two correspondence modules can have their own group of letters linked to the code (refer to the Letter Group File in the Correspondence area of Student Records).

Letters Pending File

Records are automatically posted to this file when a Graduate or Withdrawal event defined in the Document Assignment File occurs; the letter code found in that file will trigger the letters in the Letter Group File that have a matching letter code. They will be generated and posted to this Letters Pending File.

Build Correspondence

This program provides an option to import letters which are pending to the Correspondence File (from where the letters can be printed).

Only one letter at a time can be processed for a given student, so letters should not be set up to be generated for the same date; otherwise, you will have to run the *build program* twice on the same date.

An example of automatically generating student letters is as follows:

1. Create a letter using Letters Entry related to a student's expected start date (or you can use a letter already created).

2. Add a record to the Letter Group File with a letter code of 'G' and using the letter's name in the Letter Code field. In the Days field enter a zero. Place a 'G' in the Date Type field.

3. Within Document Tracking, in the Document Assignment File, change the existing record that has an event named GRADUATE. Put a 'G' in the Letter Group field. Make sure the event is "turned on" ('Y' in the ON? Field).

4. Graduate a student using the Status Entry program found in Student Records / Data Entry. The graduation status you use must be of Type G for the system to recognize it as a graduate status.

5. A record should now be in the Letters Pending File with a print date. If the date is today or older, continue to the next step. A record with a future date must wait!

6. Run the Build Correspondence File program, putting a 'Y' in the Pending Letters field. Run the process for all students and leave the other prompt choices blank if that is an option.

7. Run the Print Letters program. Your letter should print. Note that at this point, you could have sent email rather than printed letters.

Reports

Default Management Student Database List

The Student Listing prints basic information found in the Student File

You can select only students with a specific status code present in the Student File, or you can print all records if you do not request a status.

Bank Loan File Listing

This report prints all loans for all students. Most of the details regarding the loan are included.

Cohort Rate Report

This function reports loans in repayment and loans in default for a selected range of time. The cohort percentage rate is produced as well as counts and amounts for the loans.

You can print the report for one bank or for all banks.

Delinquent Loans Report

This report prints all loans that have a Loan Status Code of 'D'.

Loan Work Sheets

This valuable report pulls information together from several files to provide a picture of a student's standing within the Default Management module.

One sheet is printed for each student. Information on the work sheet includes basic student demographics, loans, notes, and mailings.

Utilities

The Default Management/Utilities menu contains programs necessary from time-to-time to maintain your system.

Purge Students

This program is run periodically to purge outdated records from the Default Management System. The following files will be purged for each student selected:

> Student File
>
> Bank Loan File
>
> Notes File
>
> References Files
>
> Correspondence File

Records will only be removed for a given student if the PURGE field in the Default Management Student File contains a 'Y'.

Career Services

This module is geared to help find students for available jobs or jobs for available students. Students can become a part of the Career Services system at any time, and you can also include individuals who were never students.

The module includes a database of jobs, companies, and job candidates and will track candidates placed in one or more jobs over a period of time. Tickle dates for jobs helps you stay on top of available positions for candidates.

The Job Matching Report helps to find jobs for students based upon criteria you specify as critical. The Placement Report provides your department with information required for reporting purposes.

Data Entry

Candidate Entry

You can manually enter a candidate from the Career Services/Data Entry menu. Typically, the student number is used for the Candidate ID. In the Utilities section of Career Services, you will find an import function which will copy the selected students automatically into the candidate file.

Personal Records

This file acts as an extension of the Candidate File. Here, you can track additional addresses for the candidate in addition to data related to the student's family, references, employment, and education. The employment records are not intended to track job placement, but rather to track where a student might be currently employed while attending school; the Candidates Hired File is utilized for job placement.

Job Bank

From the Career Services/Data Entry menu you can input jobs as they become available. A job is related to a company, thus you must enter the company code and then an arbitrary job number. If there is more than one opening for the job, place that number in the Number Of Openings field; you do not have to enter separate job records.

A data field is available for taking notes related to the specific job. Information such as job hours, health benefits, etc. can be placed in the notes area. Job notes will print on the Available Jobs Report.

Some data elements in the Job Bank are used for the purpose of job matching (see Reports menu for Job Matching). If these key fields contain data, the job will only match with a candidate if the candidate has matching data in that same field.

The list of the key fields for job matching are as follows:

Group

Type

Minimum Salary

GPA

Citizenship

Car/License

Skill Codes

Personal Codes

For example, if the job bank record has 3.00 in the GPA field and COMPU in the Group field, only a candidate with a 3.00 or higher and a Group Code of COMPU will match with the job.

Candidates Hired

When a candidate is hired, add a record to the Candidates Hired File. You can find this option on the Career Services/Data Entry menu.

Specify the candidate ID, company code, job ID, and job number. You must also include a date in the Date Hired field.

After making the entry, you must run the Hired Report to update the Candidate File.

Interview Records

This entry program enables you to track candidate job interviews scheduled and completed. A disposition code is available to track the status of the interview. A NOTES data element is provided to enter any notes related to the job interview.

Company Contacts

This file is used to track company visits. If you would like to note a visit or phone call with an employer, add a record to this file. You can enter unlimited notes related to each entry.

The Company Contacts Report prints the entries made here within a date range you choose.

Company Personnel

In this file, you can record personnel with whom you deal at the companies defined in the Company File. Since a personnel code is part of the key to the record, there is no limit to the number of individuals that can be present in the file for each company.

There is a listing on the Reports menu for data you place in the Company Personnel File.

Reports

On the Career Services/Reports menu, you can experiment with the various reports available.

Available Jobs Report

This reports prints jobs that have not been filled. You can include a date range for the Tickle Date data element of the job records in the Job Bank; if you do, only job records containing a tickle date within your selected date range will be included in the output.

Company Personnel

A listing of the records in the Company Personnel File can be produced by executing this option. If a record is marked as inactive with a status code of "I," it will not print. All notes related to personnel records will print on the report.

Company Profile

You can collect detailed information for one or more employers by running this report. Any notes related to the company will print along with jobs for that company. In addition, any notes taken with regard to the jobs will also be printed.

Hired Report

It is necessary to print the Hired Report to update new entries placed in the Candidates Hired File. The Candidate Entry screen is updated for the candidate's employment.

You have an option to include or exclude job notes with each job printed. If you choose to include job notes, each job printed will be followed by the job notes, and the company notes will print at the end of the report if you requested <u>only one</u> company.

Job Matching Report

This report finds candidates who might be qualified or interested in a job or jobs in the Job Bank. The report will print a candidate followed by a list of possible jobs.

Some data elements in the Job Bank are used for the purpose of job matching. If these key fields contain data, the job will only match with a candidate if the candidate has matching data in that same field. The list of the key fields for job matching are as follows:

> Group
>
> Type
>
> Minimum Salary
>
> GPA
>
> Citizenship
>
> Car/License
>
> Skill Codes
>
> Personal Codes

For example, if the job bank record has 3.00 in the GPA field and COMPU in the Group field, only a candidate with a 3.00 or higher and a Group Code of COMPU will match with the job.

Placed Report

Students placed are reported with totals provided by types of placement (trained, related field, etc.). Only graduates will be included in this report.

Placement Audit

Students and the companies at which they were placed are printed, including the addresses of both. The order of the report is type of placement (trained, related field, etc.), within degree code, and within major.

Wages at Placement

This report determines the average hourly wage by major and degree within major.

Correspondence

Refer to the correspondence documentation under the heading of Prospect Tracking. All correspondence modules in AS3 operate in a similar fashion; however, there are no pending letters in this module.

Note that in this correspondence module, when you build the correspondence file, you will have the option to build the file for students or for companies. The 'companies' option enables you to print letters and labels to employers.

Utilities

The utility programs enable you to take corrective action if necessary. Some programs are designed to facilitate certain data entry functions.

Import Candidates

This program enables you to copy students from the Student Records Module to the Career Services Module. Several options are available so you can select the students by group. Most often, the date of expected graduation is used for the selection criterion; of course, an expected grad date would be required in the Student Database.

The Student ID will also be the Candidate ID.

If a student is already in the Career Services Module, he or she will not be copied in again; the import program will skip that student. A report will follow the import, printing those students who were written to the Candidate File.

Purge Candidates

Removing a candidate from the system is done using this utility program. First, the OK To Purge flag must be set to 'Y' in the candidate's record. This program will then search for those students and remove all related records in the Career Services Module.

Update Candidate File

This utility should be run periodically to bring information in the candidate records up-to-date and in-sync with student records. This is necessary if candidate records are created for individuals who are still active students.

Data elements such as grade point average, graduation major, graduation date, expected graduation date, etc. will change during the time the student is actively seeking employment. You should probably execute this update once a week or once a month, depending on your requirements.

Other data elements that will be copied from the Student File are:

-name and address,

-phone numbers,

-SSN,

-email address,

-and birth date.

Note that if you have been making corrections in the Candidate File and the Student File is incorrect, running this update will copy the bad data from Student Records into Career Services. Therefore, Career Services should funnel any corrections first to Student Services, and then run this update to copy the corrections into the Candidate File.

Book Sales

The Book Sales module enables you to assign books to students as a result of posting student schedules. The books related to a student's schedule can then optionally be charged to the student's account and appear on the A/R Ledger Card. Quantity-on-hand totals are maintained by the system so that you will be aware when book stocks are running low.

Depending upon your version, you will have an option to print the books on a student's schedule. (Your Thoroughbred Basic Version must be 8.51 or greater for this option).

A second means of utilizing the Book Sales software is point-of-sale in the book store. Used in this manner, you can scan the bar code of a book to your Book Entry screen, produce an invoice for the student, and post any charges to the student account.

Book Sales Menu

Book File

From the Book Sales menu, you will find your entry program for books. This file should already have been populated during the set up of your support files for Student Records; specifically, the Course Section File requires a book code(s) to be related to a course, thus, you would have defined your books in the Book File at that time.

Book Groups

This file is populated while bringing up the Student Records module. The purpose is to assign a group of books rather than one when a course is scheduled to a student. The group code you place in this record is inserted in the related course section record of your master schedule; that enables all the books you place in this single group record to be posted simultaneously.

Receipts Entry

This program is used to receive inventory to the Book File.

You can scan or enter the bar code ID, or the Book Code. Then add the number received to the Received field. When finished with all the counts, or periodically, exit the entry screen by pressing **F4** and you will have the option to update your receipts to the Book File: the Quantity On Hand in the book record will be increased and the Quantity On Order will be decreased by the quantity received. Note that the program will not allow the Quantity On Order to go below zero when your entries are updated (e.g., if the Quantity On Order is 10 and you post a receipt of 15 books, the Quantity On Order will be zero, not negative five).

A report will then follow showing the entries that were made, including the new and old quantity on hand numbers.

Inventory Adjustments

This program is used to make adjustments to your current inventory in the Book File.

You can scan or enter the bar code ID, or the Book Code. Then add the actual 'count' in the quantity field. When finished with all the counts, or periodically, exit the entry screen by pressing **F4** and you will have the option to update your counts to the Book File: the Quantity On Hand in the book record will be replaced with whatever is entered. A report will then follow showing the entries that were made, including the new and old inventory dollar values.

Update Transactions

After a student's schedule has been entered, you can run this option from the Book Sales menu. The program will sum the books for the student and create a single transaction in the Billing Edit File of Accounts Receivable. That transaction will print the next time the A/R Billing Journal is run, and, when updated will post the A/R transaction to the student account card.

Book quantities are modified in the Book File during this process. However, this action can be turned on or off on the Set-Up Screen of the Book Sales Module.

Purge Transactions

At some point, usually after the close of a term, you might choose to

erase records in the Book Transactions File. This program will ask you for the term code and then follow by deleting the related records. It is not required that you purge the transactions, but updating the transactions will become a slower process as time goes on if you never clear the old records; of course, records are removed when a student is archived.

Book Reports Menu

Book Listing

This option will print a list of books in your Book File.

Book Slips

This report prints one page per student showing which books they purchased for the term and the associated prices. A statement is printed on the form which indicates that the student received the books. The one-page printout will fit in a windowed envelope.

Course-Books Listing

This report will indicate what books are assigned to what courses for a given term. Enter the desired term and the books for the courses will print. If a course has a group of books for that term, all books in the group will be printed.

Invoice Printing

This report enables you to print invoices that were previously issued during sales in the book store.

Publisher List

The report prints the book file in publisher order.

Reorder Report

This report prints items in the Book File when the quantity on hand plus the quantity on order for that item has reached, or has fallen below, the reorder point. For example if the reorder point for a book is 20 and there are 18 on hand and 10 on order (28), the item will not print; however, if there are 18 on hand and two, one, or zero are on order, the book will print on the report.

Items will not print if the reorder point is set to zero in the Book File.

Transactions Report

This report prints book transactions that have been created from the scheduling process. Records flagged as updated have already been posted to accounts receivable. Note that the price of the book will not be placed in the record until the record has been updated.

Book Store

Set-Up Options

Among other things, this table contains some default values for the Book Sales Entry program. None of the fields are required to contain data; but, for example, if the operator will always enter the same Term Code, placing it here will save those key strokes for every sale.

Press your **F6** help key on each data element to determine whether or not you need to set this item.

Book Sales Entry

After specifying the student, term, and type of transaction, an entry screen will appear enabling you the scan (or type) the bar codes of the items being sold. As each item is requested, the Book File is examined for the price and possible tax.

When a non-inventory item is being sold (no corresponding record in the Book File), do not place anything in the Bar Code Item ID field. All other data elements of the line item should be entered (you might prefer to enter NS for non-stock in the Item # field).

When the line items have been entered, press **F4** to get to the update prompt. If you respond 'Y', a single transaction is written to the Cash and/or Billing Journals in the Accounts Receivable module. If you enter 'N' for the Update question, no action will be taken.

Daily Sales Journal

This report prints book sales within the date range selected. The output is sorted into two groups: cash payments and charges.

Monthly Sales Journal

This report prints book sales within the date range selected. The output is sorted by taxable and non-taxable. The total tax collected is

reported.

End-Of-Term Update

This clearing process will reset the figures to zero in the Sold This Term data element of all records in the Book File. Although not required, it is typically run at the close of a term, or just prior to the start of a new term.

You should run this term ending program whether your book sales are done as a part of scheduling or via the book store programs.

Library Management

The purpose of this module is to track books, video, and other media in your school library. The system will know which student has checked out an item and when it is due to be returned. You can charge a late fee, and optionally post these late fees to the student account cards.

A library search program is included so that students can find an item by title, author, subject, or catalog number.

Data Entry

Book Check-Out

From the Library menu, choose Book Check-Out to permit a student to check out a book, tape, or other item from the library collection. The due date is calculated based upon your terminal's date and the allotted time specified in the Item Type File.

Book Return

When an individual returns an item, use this program to post the entry. The overdue charge will be calculated based upon your terminal's date and the allotted time specified in the Item Type File. It would be efficient to maintain two instances of AS3, one stationed in Book Check-Out and the other in Book Return–then simply click on one or the other task to make the entry.

Library Search

This inquiry helps you to find library items by one of four search methods: title, subject, author, or catalog number.

You choose your type of search by entering all or a portion of the data element.

After making your entry and pressing **ENTER**, a view will appear beginning at the closest item as to what was entered. Move through the view, and after finding your choice, press **ENTER** to retrieve the data to your display.

Note that the search by subject or author only searches by Subject 1 and Author 1, respectively. Subject 2 and 3 and Author 2 and 3 are not part of the search mechanism.

Through the use of security options, you can set your system so that when a student logs in, he or she will only have the option to run the 'Library Search' program and no other programs.

Reports

On the Library menu, you can experiment with the various reports available.

Circulation Report

This report prints items which are currently on loan to borrowers.

Collection Catalog

A listing of items in the collection catalog is provided in order of ISBN number, title, author, subject, or catalog number.

Overdue Books Report

This report prints items that are overdue.

Alumni

This module is geared to help track students who have graduated from your institution who wish to remain in contact with the school. Students can become a part of the Alumni system at any time, and you can also include individuals who were never students. The module includes a database for printing correspondence at any moment.

Import Students to Alumni

This utility gives you the ability to copy students from the Student Records module into the Alumni module. You will find this program on the Alumni menu. There are several options available so as to permit you to import the students desired. Often the expected or actual date of graduation is used. If the Prospective Graduate flag is being set in the Student Database, that option might be preferred. Information in the Student Database is not altered during this process. The student's social security number will be become the ID number in the Alumni File.

A report will follow printing all students imported to the Alumni module.

Alumni Records

You can manually add individuals to your Alumni File. The social security number is typically used as the ID number, but this is not required. An inquiry program is available for the Alumni File from the Inquiries Menu. The Inquiries Menu can be found on the AS3 Menu, that is, the second.

Correspondence

Refer to the correspondence documentation under the heading of Prospect Tracking. All correspondence modules in AS3 operate in a similar fashion.

Import Alumni Changes

Choosing this path will take you to a menu from where you can import data from an outside source. The data must be formatted as a flat ASCII text file following a particular format. The purpose of this procedure is to import changes to records that already exist in your Alumni File. You do not use this process to import new students (see Import Students).

> *Import Alumni Records.* You can import changes to existing alumni records if the changed records are in an ASCII File. The text file must position the data elements in a pre-determined order as outlined in the Database Manager under Dictionary/Formats/AIFALMF1. The data must be in csv format, that is, comma-delimited. The name of the file should be eight characters or less, all caps, with no extension.

> *View Import Records.* You can view records that are imported but not yet updated to the Alumni File.

> *Import Errors Report.* This report will tell you what records could not be imported and the reason(s) why.

> *Update Alumni Records.* This function moves the information from the view to the Alumni Master File.

Document Tracking

The purpose of this module is to have the system automatically generate document records for students when specific events occur. As part of the setup of a given document, the document can be generated initially as outstanding or as already returned, depending upon the document. You can track outstanding documents for each student and easily flag them as returned at the appropriate time.

A second feature of this module is to have status codes assigned to students as they pass through specific stages of the student life cycle, for example, assigning an 'L' status when a goes on LOA.

A third function controlled by the Document Tracking software is the automatic generation of letters to students. When an event occurs for a student, a link to one or more letters is triggered and the letters will be placed in the Letters Pending File (see Student Records/Correspondence).

Document File

This file can be found on the Document Tracking menu. The documents you wish to track must be present in this table.

Aside from defining the document, data elements in each record control the dates that will become part of the student's document when it is created. There is an ON/OFF flag for each of the dates. When turned on, a date will be posted when the document is produced for the student; otherwise, a date will not be present. Date generation will most likely be different for various documents.

The two important dates are REQUESTED and RETURNED. A student document that has a requested date but no returned date is considered outstanding if the DAYS EXPECTED plus the REQUESTED date is greater than today's date. For example, in the case of a High School Transcript document, if the requested date is 2/1/09 and the 'expected days' is 28, the document will be outstanding on 2/29/09.

Student Documents

To assign a document to a student manually, add the record to this file. Documents can be assigned automatically in conjunction with the Document Assignment File.

Document Assignment File

This file defines ten EVENTS (or student milestones). When one of these events occurs (e.g., graduation), the documents referenced by the related record in this file will be posted to the student's list of documents. There is an ON/OFF flag in each record, and, if turned off, no action will take place when the event occurs. If the flag is turned on, the computer will follow your instructions defined in the record.

This file is initially pre-loaded with events, and the flags are all turned to OFF. To use the features, populate the data elements desired and turn the flag(s) to ON.

> *Documents.* The link which determines the documents to be posted is the Block Code. This code ties into the Block File. In that file is a list of one or more documents that are updated when the event happens.

> *Status Codes.* This same file has the power to post a student status code and status record in addition to a prospect status code and status record. In other words, when the event occurs, you can automatically have the status code of an individual modified. For example, a student might have a status of 'E' when he enrolls. If you would like to have the status change to 'A' for active when the student has his first positive attendance record posted, this can be done in the event record with the key of START. Status codes of students are controlled independently of status codes for prospects. You can affect one or the other, both, or neither.

> *Letters.* Finally, the Document Assignment File can also cause one or more letters to be generated for a student when an event occurs. This is achieved through the use of a Letter Group code which you can place in the event record. The code must then be defined in the Letter Group File found in the Student Records/Correspondence area. The Letter Group File is used to link the group code with one or more letters.

There is a second Letter Group File in the Default Management Module. This file is independent from the one found in Student Records. However, a group code in the Document Assignment File will either file if a matching Letter Group code is found.

The following is a description of the ten events:

> **APPLY** - A student receives an Applied Date during Student Entry.
>
> **ENROLL** - A student receives an Enrolled Date during Student Entry.
>
> **EXPECT** - A student receives an Expected Starting Term during Student Entry.
>
> **REGISTER** - A student receives his/her first schedule.
>
> **START** - A student has positive attendance posted for the first time.
>
> **FIN/AID** - A student has a financial aid award year record added.
>
> **FIN/AID2** - A student has a second financial aid award year record added.
>
> **PLACE** - A student is placed in the Candidate File using the Import Candidates program.
>
> **GRADUATE** - A student is graduated using Status Entry.
>
> **WITHDRAW** - A student is dropped using Status Entry.
>
> *Reversing an Event*. If you make a change in a record such as taking out an enrollment date on the Student Entry screen, the documents will have to be deleted manually in the Document Tracking module; use your shift/delete key on the line to be deleted in the Returned Documents program. If the student passes through the event once again (e.g., receives another enrollment date), the documents will be regenerated. Note that if you had not removed the documents manually as mentioned above, a second set of documents for the event would not get created.

Block File

This file works hand-in-hand with the Document Assignment File. That file contains a Block Code which is defined herewith in the Block File. The documents that are part of the block are all entered in one block record. When the event occurs, the system will first look in the Document Assignment File to get the block code and then come here to determine what documents are to be posted to the Student Documents File.

Each document you enter in the Block File must first be placed in the Document File.

You can have more than 16 documents posted at one time through the use of the NEXT BLOCK data element. Here, you can specify the code of another block record; documents found in that block record will also be assigned to the student at the same time. This linkage enables you to have an infinite number of documents posted to a student when a single event occurs.

Returned Documents Entry

This program is used to tell the system that a document has been returned by the student. After selecting the student, his documents will appear on the screen. Enter the returned date for the document(s) to be affected.

Outstanding Documents

This report can be found on the Document Tracking menu. It is designed to print any documents that are considered outstanding. The date expected will also be included.

Housing

The Housing module is designed track the dormitories, apartments, and bedrooms where students are staying on (or off) campus. The system will charge the student accounts when you are ready. Software is also included to maintain a database of damage instances and charge student accounts when necessary.

Set-Up Charges

Room Charges

Charging students for rooms is controlled by four different files. Most often, only one of these files is used. If all rooms are priced at the same rate, you need only enter the amount in the Room Charge Default File. If charges vary by location (e.g., dormitory), the Location File will contain the charge for each location. If the housing charge varies for each room, the charges are placed in the Room File (Room Entry). Finally, each student can be charged a different amount–this charge would be indicated using the Student Entry program.

A combination of these options can be used. For example, rooms in one location might cost $2,000 whereas all other locations cost $1,500. Simply, place $2,000 in the appropriate location record and $1,500 in the Room Charge Default file. In addition, there might be several rooms that have a higher price just because of their size; these room records would contain their own cost. And, it is even possible with all these charges set up to have John Doe only pay $100 regardless of his room by placing $100 in his student record.

The housing billing function first looks at the student's record for the price, then the room record, then the location record, and, finally, if a cost is not yet found, it will retrieve it from the Room Charge Default file.

Room Charge Default

Based upon the information provided above, place the default charge in this file. The Room Charge Default file contains only one record to retain this amount. This file will be found under Housing/Support Files.

Location File

You must define each location. A location is a building containing one or more rooms (every room must be associated with a location). Examples of locations are dormitories, apartments, hotels, etc. If the housing charge will vary by location, place the charges in the location records you create. This file will be found under Housing/Support Files.

Data Entry

Room Entry

Under Housing/Data Entry, enter all the bedrooms available. Each room record is related to a term code; this feature allows you to schedule the same room for more than one term at a time. A term code need not be an academic term code–you can define term codes related to an academic year, a semester, etc. Term codes are created within the Student Records module.

> *Bedroom.* Enter a code to identify the bedroom within the room. A room (or suite) can consist of more than one bedroom; if the room is not a suite, that is, it is only one bedroom, enter a '1' or letter 'A' as the bedroom code.

> *Occupancy*. Enter the number of students that can reside in this bedroom. The computer will manage the Beds Scheduled and Available Beds data elements (no entries will be permitted here).

> *Gender.* Indicate M for males or F for females. The software will not permit males and females to reside in the same room. You can enter N for *not defined*; in this case, the first student scheduled into that room will pass his or her gender automatically to the room when the Room Assignment program is run. The room will then retain the gender of the first student scheduled into it.

> *Bedtime.* You can specify early (1), average (2), or late (3) bedtime for a room. You are free to define these numbers (1, 2, & 3) in any manner; however, the restrictions on scheduling are as follows: a student with any bedtime code can be scheduled into a **room** that has a code of two. A **student** with a code of two can be scheduled into any room. The codes of one and three are incompatible and scheduling will not be permitted in this case. Like gender, a room flagged as a two will take on the bedtime code of the first student scheduled into it.

Smoking. You can classify students and rooms as smoking, non-smoking, or indifferent. Smokers will not match with non-smokers, but either will match with *indifferent*. As with the case of gender and bedtime, a room flagged as indifferent will take on the characteristic of the first student scheduled into it.

Student Entry

Enter a record for each student to be scheduled for the term. The data elements for location and room cannot be input on this screen; they will be populated during Room Assignment.

The *billing complete* field is managed by the Housing Billing program; a student will have a Y placed here when the billing is done–a Y in this field prevents the student from being billed on a subsequent run of the Housing Billing program.

Like rooms, students have indicators for gender, smoking, and bedtime. Smoking, gender, and bedtime flags will come into play when attempting to schedule a student into a room.

The student's name and gender are read from the Student Records module; they are not input in the Housing module.

Assign Rooms

This program can be used to assign students to rooms manually. After you input a term code, student, location, room, and bedroom, a view of the students already scheduled in that bedroom will appear. Press **F4** to exit the view and you will then have the option to update or cancel the entry.

When you enter the student ID, if the student is already scheduled in a room for that term, you will have the option to delete the student from the room in which he or she is scheduled. This is the only way you should delete a student from a room since the beds will be updated.

Conflicts such as gender, smoking, and bedtime will prevent you from scheduling a student in a room. Also, a room set to *inactive* in the room file will block scheduling.

After scheduling a student to a room, the *beds scheduled* and *available beds* will be updated automatically.

Automatic Assignments

This room scheduling program can be executed to assign students to rooms by batch. The process will take the students not yet scheduled and place them into the available bedrooms.

The same logic regarding gender, smoking, and bedtime found in the Assign Rooms program is used during the automatic assignment of rooms. The scheduling process will insist on filling a room to capacity before beginning with the next available room.

A bedroom flagged as not active will be skipped over.

Inquiry

You can inquire about a room by entering the term, location, and room number. You can inquire about a student by entering the term, skipping the location and room, and then inputting the student ID. In either case, after the cursor passes through the room number, the list of occupants will appear; press **F4** to exit the list of occupants.

Damage Entry

Damage to rooms, dorms, or other areas of the campus can be tracked by student and term in the Dorm Damage File on the Housing/Data Entry Menu. When a record is added, an entry will be posted to the Dorm Damage Journal Edit File in addition to the Dorm Damage File.

Records are removed from the edit file when the Dorm Damage Journal is printed.

You must specify an Accounts Receivable Transaction Type when adding records using Damage Entry; if you choose to subsequently post the transaction to the A/R Billing Journal and thus the student's account card, the transaction type is necessary to classify the transaction. If you are not posting to the Billing Journal, the transaction type is still required but will be ignored.

Damage Edit

New dorm damage records entered are placed in this temporary edit file

in addition to the permanent Dorm Damage File. You can use this edit to delete an entry (Shift/Delete on the line), or to make corrections. When the Damage Journal is printed, you can update these records to the A/R Billing Journal, or you can choose to erase them.

Damage Journal

Records in the Damage Edit File will be printed when the Damage Journal is run. Following the printout, you will have three options: 1) erase the records just printed, 2) update the records to the Accounts Receivable Module–when the Billing Journal is subsequently printed and posted, the transactions will be moved to the students' Account Cards as a debit, or 3) return to the menu leaving the records in the Dorm Edit File (neither erased nor updated to accounts receivable).

To utilize the interface to accounts receivable, there must be a transaction type DD defined in the Transaction Type File under Accounts Receivable/Support Files; if DD is not present as a valid transaction type, you can enter an amount of dorm damage and the record will not be posted to the A/R module when the Damage Journal is updated.

Incident Entry

This data file will collect entries you make regarding incidents reported, either on-campus or off-campus. The type of incident being input is coded via the Incident Type File (see Housing/Support Files). To enter a new incident, place the letter 'N' in the first data element; the system will generate an incident code which will be the current date (year, month, day) followed by a three-digit sequence number. For example, the first incident on January 3, 2009 would be coded as 090103001 (YYMMDDnnn). Each day can have up to 999 incidents (nnn). You can affect the generation of the code by changing your terminal's date (see AS3 Menu, Terminal Date).

Correspondence

Refer to the correspondence documentation under the heading of Prospect Tracking. All correspondence modules in AS3 operate in a similar fashion; however, there are no pending letters in this module.

An added feature in this module is the ability to print letters to students informing them of their room and location assignments.

Reports

On the Housing/Reports menu, you can experiment with the various reports available.

Available Rooms Report

Prints rooms available for the selected term.

Unscheduled Students

This report will print students in the Student Housing File who have not yet been assigned a room for the term chosen.

Scheduled Students

Students scheduled for the term you input will be printed on this report.

Students By Location

This report prints scheduled students in order by their location.

Utilities

This menu contains programs used infrequently; however, they are extremely useful at the right point in time.

Rebuild Beds Scheduled

This program will read the Student Housing File and reconstruct the beds scheduled in the Room File. This might be necessary if the totals become inaccurate due to computer malfunction, power failure, etc. It will also be necessary if you archive students (in the Student Records Module) without first deleting them from the room.

Copy/Purge Room Records

This program can be used to remove old records from prior terms that are no longer required in the Room File. A second use for this utility is to copy existing records from one term to the next so they need not be entered manually.

Copy/Purge Student Records

This program can be used to remove old records from prior terms that are no longer required in the Student File. A second use for this utility is to copy existing records from one term to the next so they need not be entered manually. You will have the option to clear the location and room in which the students are scheduled; in this case you will need to go through the room assignment process for the new term.

Billing

Charging student accounts for housing is done from within the Accounts Receivable module. From the Accounts Receivable/Data Entry/Housing Billing menu, you will have options available to achieve this.

Room Charges Report

This report will print the charges that will be updated if you run the Post Room Charges program. It is wise to run this report prior to the posting to be certain that your entries for the term being billed are correct. A student with his billing flag set to 'Y' will not be on the report and cannot be billed (it is the posting program that sets the billing flag).

Post Room Charges

This update will look at the student housing file and post charges to the Billing Journal in Accounts Receivable. When a student is updated, her billing flag is set so that subsequent runs of this process will not bill a student again. Transactions posted will reside in the Billing Edit file; there, you can make corrections or deletions if necessary. Printing and updating the Billing Journal will move the housing transactions to the student account cards.

Set/Clear Housing Billing Flags

At times, it might be necessary to clear or set the billing flags in the Student Housing File for a selected term. A case when this would be necessary would be if you posted the student housing charges, and after looking at the Billing Journal, you determined that much or all of it was incorrect.

From within Accounts Receivable you can erase the data in the Billing Journal; you would then have to clear all the flags in the Student Housing File if you were to re-run the Post Room Charges program.

Customers

This software module is designed to allow the system to receive payments from individuals who are not students. Payments can be for services such as haircuts, massages, or inventory items of any kind.

Item File

Each item or service you sell must have a record in this file. The item code should be entered in upper case and can be any code which you can relate to the item.

The selling price can be calculated automatically by entering the cost and the mark-up percent. Quantity on hand is reduced as items are sold using Cash Receipts.

By placing the item's bar code in the appropriate field, the item can be scanned during Cash Receipts Entry to retrieve the price, code, and description.

Transaction Types

Each transaction that occurs must be accompanied by a transaction type. The two-character code must be defined in the Transaction Type File within the Accounts Receivable module (for example, you might set up HC for haircut).

Data Entry

Sales Entry

This entry program provides a means of entering cash transactions which occur by selling items and/or services to customers who might be students or non-students.

Computer-generated transaction numbers will be related to each transaction as they are entered. To post a typical transaction, enter a customer ID of an individual already on file (right-click to look up customers, or press **F2**). If the customer is not in your customer database, bypass the 'Customer ID' field by pressing **ENTER**; then, you can enter the last and first name of the customer.

The screen for selling items/services will appear. Enter or scan the barcode or make up any code for a non-stock item. Adjust the quantity sold if it is greater than one. The price will appear if the item is in your Item File with a price; otherwise, for non-stock items, enter the price per item. When doing a return, enter the amount as a negative number.

When done, X out of the screen or press **F4** to exit. You will then have an option to print the invoice. After printing, you should respond 'Y' to update. If you want to cancel the entry, answer 'N' to the update question.

Cash Edit

This feature is used for changing or deleting records input using Sales Entry prior to updating the Cash Receipts Journal.

 - Records remain in file until the Cash Receipts Journal is updated.

 - You can delete a line entry with SHIFT/DELETE or on some keyboards CONTROL/D.

 - You can modify an entry by typing over existing data. You cannot change the transaction number.

Inquiries

The Inquiry software enables the user to view data but not change it in any way. Your system administrator can assign an operator a clearance code that only permits that operator to perform inquiries.

The Inquiry Menu provides displays of data in the following areas:

Academic Records

Schedules

Student Demographics

Attendance

Student Status Records

Student Account Card

Archived Students

Class Rosters

Enrollment Totals

Prospect Demographics

Prospect Status Records

Candidates

Housing

Default Management

Alumni Demographics

Database Query

System Administrator

The System Administrator software enables the person(s) in charge to manage security of the system and to maintain the integrity of the information in the database. Several data files and system utilities are provided to help in this task.

Support Files

Most support files found on the System Administrator menu are pre-populated and need not be input when the system is delivered.

System Administrator Options

This support file will contain on/off switches for your AS3 software system. At present, the following option is available:

General Ledger Interface

G	Great Plains
M	MAS 90
T	Thoroughbred Solution 4
Q	Quick Books

The following functions will update the General Ledger; however, you must have the Chart Of Account numbers present in the A/R Transaction Type File (which you will find under Accounts Receivable / Support Files):

Billing Journal

Cash Receipts Journal

Earnings Report

Financial Aid Payments Journal

Be careful not to import the same file twice. After importing it, either rename it, or remove it from your system.

Operator Code File

See Security.

State & Country Files

These files contain definitions of country codes and state codes. If your school is in Canada, you will need to enter your province codes in the State File.

Archive Control File & Restore Control File

These two files are AS3 System Files and are used to control student

AS3 Manual

System Administrator

archiving, and the restore process. You typically do not need to make modifications to these files.

Campus Name and Address File

Your campus code is already set up for you. Typically, the campus code is set to 100 when your system is delivered. This code should not be changed because the campus data files include your campus code in the names of the files.

To add an additional campus to your system, add a record here (e.g., Campus Code 200). Then call AlaQuest Support for instructions on how to have the new data files created for the campus.

Some reports can print for more than one campus (e.g., AR Aged Trial Balance). Those reports will request a Campus Group Code. You can create your groups in this file by placing a letter in the Group Field (e.g., 'A'). In this example, when you run the report and specify Group A, any campus with that group code of 'A' will be included in the report.

File of Files

This is an AS3 System File and contains sizes and other information about the data files present in AS3. When you run File Checker, it uses data in this table to compare to the actual live data files found on your system.

Purged Students Log

Whenever an operator purges (erases) a student from AS3, a record is written to this log file. The operator code of the person who runs the purge program is written to the record and the date as well.

This log does not track archived students, only students who are purged.

Text Options

This file will permit you to enter text that will print at the foot of a given document. Several document options are currently available:

> *Transcript.* The text entered here is often used for a grade legend and/or a signature line.
>
> *Schedule*. Same as transcript.
>
> *Payment Plan*. Same as transcript.
>
> *Cash Receipt*. Any text you place here will print at the bottom of the cash receipt. An example would be to inform the student to "Retain This Document for Your Records".
>
> *Financial Aid Receipt*. Same as cash receipt.
>
> *Statements.* Same as Cash Receipt. An example would be to inform the student to pay the balance: "Please Remit."
>
> *Book Invoice Cash.* Prints at the foot of the book sales entry invoice. For example: "Paid in full. Thank you."
>
> *Book Invoice Charge*. Prints at the foot of the book sales entry invoice. For example: "This amount has been charged to your account. Thank you."
>
> *Book Slips*. Prints at the foot of the book slip. For example, "Please sign to acknowledge that you have received the books listed above."

To enter text for one of the above documents, choose the option to CHANGE. Move to the document for which you would like to enter a block of text. Press **ENTER** on the single-character box and a text window will appear. You may now input as much text as desired. When done adding text, press **F4** to exit the text box–you will be asked if you would like to SAVE your text at this point.

Import Data

This choice will lead you to a menu from which you can import information.

Build Student Degrees

If you wish to create the Student Degree File from data already present in the Student Database, you can run this program to achieve that goal. A record is usually posted to the Student Degree File when a student graduates and a graduation status is posted using Status Entry. However, if you have imported students, academic records, etc. and not the student degrees, this feature will be helpful.

System Administrator Reports

Some reports are available for the system administrator to make it easier to manage data on the system.

File Links Report

This report shows the names of the file formats (tables), physical data file names (the @ sign is replaced by your campus code in the file name), and other database information. The report is useful when writing reports since you will be required to know the file <u>link</u> names.

Operator Code List

Printing the operator codes, gives you a listing of what individuals are permitted to log into AS3. Their name, operator code, and password are printed on the report. This report is the only means of determining an operator's password, since it will not be displayed on the screen during file maintenance.

Student Login

You can set up an entry point (icon) which will enable a student to log into AS3 to print any or all of the following documents: transcript, degree audit, student schedule, student account card (statement). The set-up file found in this chapter allows you to give the student permission (or not) to print any of these listed documents.

The student must enter his student ID and pin number to arrive at the menu where he can choose which documents to print. At the completion of printing, the student is automatically returned to the desktop.

Please call Customer Service to set up the desktop icon.

Utilities

The System Administrator/Utilities menu contains programs necessary from time-to-time due to system failures, updates, etc.

File Checker

This function is used to check that physical data files are present, and that they consist of the correct record size. When a file is found missing, it is created. When a file is found to be of the wrong size, it is automatically re-sized. The time this program is run is during a product update, although it can be run at any time. At the completion of the program, the number of error conditions will be reported. To insure the error conditions have been corrected, you can rerun the job and check that you do not receive any error conditions.

Rebuild Sort Files

The AS3 System contains many background sort files used to produce output in a desired order without sorting the data. Occasionally, the sort files might need to be re-sorted because of a power failure or another instance of the system crashing. You should only rebuild the **AI** library. All other users must be out of AS3 when you execute this program. Read the menu help on this item by pressing the **F6** key while stationed on the program name.

Convert Notes

These programs will copy notes from the older note files to the new Personal Note Files in the following modules: Student Records, Accounts Receivable, and Financial Aid. This is an option but is not required since both sets of note-taking files are part of AS3.

ODBC File Maintenance

This option is used to make AS3 files available to other software products outside of AS3. You must have the optional ODBC add-on product to utilize this function.

Backup

BACKUP SUGGESTIONS (Windows-based environments)

Sometimes, you are not aware of a file corruption for several days or weeks, and only a scheme like this might provide the type of file recovery you need.

Here is what we suggest for backups:

Monday thru Thursday - Retain these four backups until the following week.

Friday - Retain 4 or 5 Friday backups until the following month.

Last day of month - Keep these backups for 1 year.

This means 21 backups will be retained. It gives you flexibility to recover from different points in time. You might even keep an annual end-of-year backup which is never overwritten.

To back up the full AS3, right-click on the lead folder, copy it, and paste it to another hard drive on your network. Zip it up using WINZIP, and rename it something like the following:

BD111909.zip (Backup Daily 11/19/09).

BF112109.zip (Backup Friday 11/21/09).

BM113009.zip (Backup Monthly 11/30/09).

To be certain you are backing up AS3, do the following:

Look at the AS3 shortcut properties.

The target folder is usually the root of AS3. However, if you don't see the 'Z' folder in the target folder, 99% of AS3 is somewhere else; to find it, choose FIND TARGET. Then open the file IPLINPUT.TXT and check the paths of the AS3 partitions labeled D0 through DA.

Note that it is possible that your disk layout is not a standard AS3 layout and your system might not be under the Z folder. If you are not sure where your data files are, please call AlaQuest Support.

The best scenario is to do your backups to a laptop on the network that is taken home at the end of the day. This gives you an off-site backup.

Security

AS3 security allows you to give each operator an operator code with an optional password. Since often temporary work files are created using the operator code as part of the name of the work file, it is important that each time AS3 is launched, the user(s) enters with a different operator code. For this reason, the same person might need more than one operator code.

AS3 enables you to specify in which areas of the software an individual (operator code) can enter.

When the AS3 software is first installed, the system administrator operator code is already set up: the operator code is AS3 and there is no password. When other individuals are ready to begin using the system, you should add a password to the AS3 operator code so other users can't log in with the powers of the system administrator (see Operator Code File).

An example operator code of PM1 has also been installed. This operator has been placed in three groups 102 (Accounts Receivable), 111 (Prospect Tracking), and 113 (Inquiries). If you log in as PM1, you will notice that other options will not be available to you (the menus will tailor themselves to these groups).

Another example of limited use is the operator code JOE. Joe is a student and can only use the system to search for items in the library. Joe's group is 999 which is defined as No Group.

Data Entry

Operator Code File

Under System Administrator/Support Files, choose Operator Code File. Step one is to call up an operator code that already exists in Inquiry Mode (e.g., AS3). Note how the fields are filled out. Write them down or print a hard copy using the **F3** key.

In Add Mode, create a new operator. The only difference in the new operator code from the one you examined in Inquiry Mode will be the first three fields: Operator Code, Password, and Name. Note that the operator code must contain three characters. The data element FIELD EDIT CLEAR should be set to Y. If you blank out the Hotkey Menu field, the operator will not have the hotkey option.

You should not confuse the Operator Code with the operator's password. Operator codes will appear occasionally in views, mail lists, etc. and do not provide security. Using an individual's initials as the operator code is suggested for memory purposes, but it is recommended you include a password for security reasons. The password can contain upper and lower case and even special characters such as a period or slash.

Operator-Instructor Code File

For some institutions where operators are instructors and will be taking attendance, it is important to link the operator code to the instructor's ID Code. If this is done here, when an operator who is an instructor takes attendance or does grade entry, only that instructor's rosters can be processed by this person. He or she will not be able to enter data on the roster of another instructor.

An operator can be defined as a 'super user' for attendance and/or grades in which case that operator can process the rosters of other instructors.

You can also give an operator, defined here, the power to print a transcript that is otherwise on hold by setting the 'Hold' field to Y.

VIP Mode

You can control if an operator will begin with VIP on or off. To have an operator start with VIP on (GUI), the entry program should read VIPSTART; otherwise, set the entry program to OO (oh oh, not zero zero). If not in VIP mode, the user's workstation will operate in 'character mode,' in which case the mouse will be non-functional. An advantage of 'character mode' is the clarity of the characters on the screen.

After adding or removing operator codes, be sure to continue with the following steps to update the security groups; do this prior to logging off, otherwise, there could be a problem logging back in with the files out of sync.

To print the entries in the Operator Code File, including passwords, go to the System Administrator / Reports menu and choose the Operator Code List option.

Security Level File

Each operator can be assigned a level of security which will affect his ability to view Personal Notes in the following software modules: Student Records / AR / Financial Aid. Level nine is the most security and zero represents no security.

If an operator has a level of five, that operator would not be permitted to view notes that have a higher level (that is, 6, 7, 8, or 9). This operator could only view notes with a level of zero through five.

Change Password

Any user can change his or her password by running this utility. From the initial menu, choose AS3, then Change Password on the following menu.

First, you must enter your current password. If you don't presently have a password, leave this entry blank. Then, enter your new password twice. The next time you log in, your password will be different. You can remove your password by leaving the new password fields blank.

Nothing is changed until you respond Y to 'Options OK.'

Software Module Security

After launching AS3, from the initial menu, choose Security.

Edit Groups

Call up this screen to examine the groups. The System Administrator Group is 101. This group is permitted everywhere. At the end of each line, append the new operator code separating operator codes with a comma. Be careful not to modify any of the other information on the screen. In the case of the operator code, your input must match how the code was defined in the operator code file (e.g., ABC does not equal abc). When done, press **F4** and you will be asked to save the changes (respond 'Y' if your input is correct).

Note that each software module has a three-digit number that identifies it:

System Administrator	101 (super user)
Accounts Receivable	102
Alumni	103
Book Sales	104
Career Services	105
Default Management	106
Document Tracking	107
Financial Aid	108
Housing	109
Library	110
Prospect Tracking	111
Student Records	112
Inquiries	113
End User	114
Support Files	115
Scheduling Support Files	116
Instructor Grades	117
Customers	118
No Group	999

For example if PM1 and JOE (operator codes) can both use the Accounts Receivable module, that line would look like the following:

Accounts Receivable::102:ABC,JOE

Note: Support Files are data files utilized in initially designing your system. Most of the software modules in AS3 have an area for Support Files. From time-to-time, modifications will be required within your support files.

You might not want all users to have access to support files. If an operator will be permitted to enter an area for Set-Up Support Files, that operator must have the code of 115 associated with his or her operator code.

Note that the system administrator is always permitted in support files, even without the code of 115.

Scheduling Support Files utilize code 116. A user with permission for support files (115) automatically is included with scheduling support files (116). However, the opposite is not true; that is, a user with permission for scheduling support files (116) does not automatically receive permission for other support files (115).

Do not leave a colon (:) out accidentally. This could result in full system administrator rights!

No Group (999)

If an operator code is assigned to group 999, that operator will only have the option to search the library for a book or item. This feature enables you to set up an operator code under which students can work to utilize this feature of the Library Module software.

Edit User IDs

From the same security menu, select Edit User IDs. Here, you will add the individuals you placed in the Edit Groups (above). In this file, you will have one line for each operator code.

The first number that follows the operator code is a user ID number. Any number can be used, but it must be different than the others.

The second number is the group code. See Edit Groups for the definitions of the group codes (e.g., 112 is for Student Records). If an operator is in more than one group, enter the multiple groups, separating them by commas.

The name of the operator follows the group code. This is here for information only.

Important. The colons (:) must be placed in the exact positions shown by the examples provided. Do not eliminate or change the positions of the colons in any new lines you add.

Important. Any operator code entered in Edit Groups must be present in Edit User IDs. Do not continue to the next step unless you are sure this is true. And, afterward, you must run Initialize Security and Generate New Version.

In the following example, operator code JOE is permitted in Accounts Receivable and Prospect Tracking:

> JOE::2:102,111:Joe Doe::

Initialize Security

Choose Option A, Initialize Security. This program will clear the old security setup and will prepare the security files for your new setup.

Generate New Version

Prior to running this final step, log in a second time as the system administrator; in the event you have made an error in your setup and can't log in, you will still be in the system and can make the correction(s) with the second user.

Run Option B, Generate New Version. This program will rebuild the AS3 security based upon your new setup. When it terminates, try logging in with one or several of the operator codes to be sure the new security is working.

Starting the Workstation Manager Automatically

The Workstation Manager is necessary if the user is in VIP mode and wants to use the Hotkey (control/P).

Add a shortcut for C:\TSI\BIN\TWMGR.EXE in the C:\WINDOWS\StartMenu\Programs\Startup directory.

Note that the above path might differ on some systems.

VIP Manual

The Workstation Manager allows each user to change the appearance of the software on his or her workstation. Refer to the Thoroughbred VIP manual for more information on the Workstation Manager.

Some of the options you will find helpful include the following:

> * Remember where you have placed a window.
>
> * Colors.
>
> * Fonts.
>
> * Dialog box for messages or status bar for messages.

APPENDIX A

Order of Data Files Population

ALAQUEST INTERNATIONAL, INC.

Description: Prospect Tracking, Order of Data Files Population		
Rev: 01/09/04		
FILE NAME	**REQUIRED**	**COMMENT**
Set-Up Options	Yes	
Admin Reps	Yes	Use 999 as a generic "house rep" if desired
Classification Codes	No	Used to group leads for reports
Group Codes	No	Used to group leads for reports
Mailing Codes	No	Used to group leads for reports
Media Codes	Yes	Required if tracking lead source, e.g., N=Newspaper
Status Codes	No	Already contains I, S, T (add others if required)
Test Versions	No	Required if tracking Aptitude Tests and version numbers
Source Codes	Yes	Create a generic source if not tracking source of lead
Majors*	No	Required if tracking program of interest
High Schools*	No	Required if tracking high schools
Term Codes*	No	Required if tracking expected starting term
Personnel Codes	No	Required if tracking personnel at high schools
* Found in Student Records,		
see Set-Up Support Files		

ALAQUEST INTERNATIONAL, INC.

Description: Student Records, Order of Data Files Population, Page 1 of 2	Rev: 11/20/00	
FILE NAME	**REQUIRED**	**COMMENT**
Status Codes	Yes	E.g., A=Active, G=Graduate, L=LOA, etc.
Set-Up Options	Yes	
Class Codes	Yes	E.g., D=Day, E=Evening, W=Weekend
Colleges	No	Required if tracking prior colleges
Departments	No	Can be placed in your Course Catalog File
Counselor	No	Required if tracking academic counselors
Honor Codes	No	Required if a course in Course Catalog includes honors
Course Catalog	Yes	The courses you offer
Degree Codes	Yes	Required for the major file, and students to graduate
Majors	Yes	Programs of study
Education Codes	No	Used to track prior education
Enrollment Status	Yes	Used to determine course load status
Grades	Yes	
High Schools	No	Required to track high school attended
Race Codes	Yes	Create a generic code if not tracking race codes
Reason Codes	No	Used to track reason for a status, e.g., MED=Medical
Sponsors	No	Used to track a sponsor related to a student
Standards Of Progress	No	Used to define school's policy for academic progress
Status Groups	No	Used to group status codes for reporting purposes
Term Codes	Yes	Defines terms, semesters, or blocks of time
Section Codes	Yes	Allows multiple occurrences of the same course
Instructors	Yes	Use STAFF for generic instructor, TRANS for transfers
Blocks	No	Used to schedule multiple courses simultaneously
Course Links	No	Used to define prerequisites, equivalents, etc.
Book Entry	No	Required if book module being utilized
Book Groups	No	Necessary if more than one book for same course
Periods	Yes	Defines times of day classes meet
Daily Hours File	No	Clock Hour programs can generate end & grad dates
Holidays	Yes	Enter the holidays on which school is closed
Course Sections	Yes*	This is your master schedule
Automatic Scheduling	No	Can aid in creating records in Course Section File
Degree Audit	No	Required to print Degree Audits
Letter Groups	No	Used for auto generation of student letters
The Scheduling file can create records here.		

ALAQUEST INTERNATIONAL, INC.

Description: Accounts Receivable, Order of Data Files Population		
Rev: 11/11/2002		
FILE NAME	**REQUIRED**	**COMMENT**
Set-Up Options	Yes	
Adjustment Policy	No	Used to define tuition adjustments
Charge Codes	No	Used for group billings, e.g., parking, meal plans, etc.
Transaction Types	Yes	Every A/R transaction requires a transaction type
Variable Billing	No	Used for combination of flat rate and/or hourly billing
Billing Groups	No	Used to bill additional charges, e.g., Lab Fees, Reg Fee
Billing Charges	Yes	Defines how billing is done for each major
Agency File	No	Required only if using the Collections Module in A/R
Payment Plans Active	Yes	Used to relate payments to payment plans

ALAQUEST INTERNATIONAL, INC.

Description: Financial Aid, Order of Data Files Population		
Rev: 12/01/04		
FILE NAME	**REQUIRED**	**COMMENT**
Set-Up Options	Yes	
Banks	Yes	Create at least one bank to link to funds
Fund Codes	Yes	Define types of financial aid available
Fund Groups	No	Used to report by groups of funds
Disbursement Controls	Yes	One for each fund. Controls disbursement of funds
Block Code File	No	Necessary to package by blocks.
Packaging Block File	No	Necessary to package by blocks.
Fund Group File	No	Sometimes needed to process several funds at once.
Guarantor File	No	Required to associate a guarantor with a loan.
		*Same Guarantor File is used in Financial Aid.

ALAQUEST INTERNATIONAL, INC.

Description: Career Services, Order of Data Files Population		
Rev: 01/26/01		
FILE NAME	**REQUIRED**	**COMMENT**
Group Codes	No	Used to group candidates, jobs, and companies
Type Codes	No	Used to group candidates, jobs, and companies
Job Locations	No	Used to identify job locations
Company Types	No	Used to group companies
Personal Codes	No	Used to define personal codes for jobs and candidates
Skill Codes	No	Used to define skill codes for jobs and candidates
Related Fields	Yes	Relates jobs with majors
Waiver Reasons	No	Used to define reasons for placement waivers
Company File	Yes	Jobs must be linked to companies.
Counselor File	No	Used to assign candidates to counselors.

ALAQUEST INTERNATIONAL, INC.

Description: Library, Order of Data Files Population		
Rev.: 11/20/2000		
FILE NAME	**REQUIRED**	**COMMENT**
Item Types	Yes	Used to identify items in library, e.g., Books, Tapes, etc.
If posting overdue charges to		
A/R, you must define the		
following transaction type in		
the A/R Transaction Type		
File: LY		

ALAQUEST INTERNATIONAL, INC.

Description: Document Tracking, Order of Data Files Population		
Rev: 1/26/02		
FILE NAME	**REQUIRED**	**COMMENT**
Documents File	Yes	Used to define documents to be tracked.
Block File	No	Indicates documents that get assigned automatically.
Document Assignment File*	No	Used to turn on/off document assignment events.
*This file is pre-loaded with		
events. Populate the status,		
block, and letter code fields		
for the events if desirable.		

ALAQUEST INTERNATIONAL, INC.

Description: Housing, Order of Data Files Population		
Rev: 02/23/01		
FILE NAME	**REQUIRED**	**COMMENT**
Room Charge Default File	Yes	If all rooms are charged the same amount
Locations	Yes	All rooms must belong to a location
Room Entry (Room File)	Yes	Enter each room available for housing
Student Entry (Students)	Yes	Enter each student desiring housing
Incident Type File	No	Required if entering incidents
If posting dorm damage charges		
you must define the DD trans-		
action type in the A/R Module.		

ALAQUEST INTERNATIONAL, INC.

Description: Default Management, Order of Data Files Population		
Rev: 12/01/04		
FILE NAME	**REQUIRED**	**COMMENT**
Guarantor File	Yes	Same file is used in the Financial Aid module.

ALAQUEST INTERNATIONAL, INC.

Description: Instructor Grades, Order of Data Files Population		
Rev: 4/12/05		
FILE NAME	**REQUIRED**	**COMMENT**
Instructor Grades File	Yes	Define valid grades to be used by instructor.
Instructor Test ID File	Yes	Define the tests an instructor will give.

ALAQUEST INTERNATIONAL, INC.

Description: System Administrator, Order of Data Files Population		
Rev: 7/14/05		
FILE NAME	**REQUIRED**	**COMMENT**
County File	No	Used to validate county codes for all modules.
Operator File	No	Needed if each operator will have a password.
System Administrator Options	No	Only if student pictures or a General Ledger on-line.
Text Options	No	Used to add blocks of text to some documents.

APPENDIX B

Frequently Asked Questions

Frequently Asked Questions

1. How can I get a list of new students who started classes (attended at least one class)?

Student Records / Reports / Students by Status Report. In Document Tracking, use the Document Assignment File to specify a status code of 'A' for active. This status should be triggered by the EVENT named START (first positive attendance). When you run the Students by Status Report, enter a range of dates from the beginning of the term through a date somewhere into the term. New students who first attended during this date range will appear with the group of 'A' status codes.

You can also experiment with the Show/No-Show Report on the Attendance menu.

2. How can I quickly print a single transcript for a student?

Inquiries / Academic Records. Ask for a hard copy using the **F3** key when at the Term field.

3. How can I know what a given program on a menu is designed to do?

With the cursor at that menu item, press the **F6** key. To get a hard copy of this help screen, press the **F3** key and respond 'W' for window.

4. Can I change a student's ID number at any time?

Yes. Go to Student Records / Utilities / Change Student ID.

5. After I press **F2** to look up a student by name, do I have to scroll through the list with arrow-down or page-down to find the student?

Try entering part of the last name before pressing the **F2** key; upper or lower case won't matter. This will bring you very close to that person.

After pressing **F2**, you can press **F10** and enter all or part of the last name, the first initial, and no middle initial. This should find your student quickly. You also have the option to press **F5** after pressing **F2**. This will allow you to change the look-up sort. For example, after **F5**, you can choose the SSN sort then press **F10** and put in a social security number to find a student in that manner.

6. How can I get a quick list of students?

Under Student Records / Data Entry, run the Build Selection File. With the options available, you can tailor a list of the students you want on the list. Then go to Student Records / Support Files / Listings and run the Student Name Listing. In the Process By field, enter I for Input Selection File and then choose Selection File number 99 (the one you just created). An option is available to give the report a name of your choice.

7. If I don't use the SSN as the Student ID, how can I find a student by way of Social Security Number?

Look up a student the usual way using **F2** in the Student ID field. Then press **F5** to change the sort and pick Sort 4 (SSN). Then the window of students will be sorted by SSN. You can now press **F10** for a GOTO command and enter the precise social security number.

APPENDIX C

Quick Start Tutorial

Quick Start Tutorial

The following is provided to enable you to run through the software with a minimum of knowledge and data entry. The goal of the exercise is to help form a conceptual framework upon which you can build at a later time as you add more features of the software to your repertoire.

The entries you make during this Quick Start Tutorial will be retained as part of your permanent setup. The prospect and student you add can be archived, so you need not fear that you will be corrupting your database with test data.

You will be directed to an item on a menu in the following manner:

SR/DATA ENTRY/SCHEDULE ENTRY

Product codes will be abbreviated with two characters such as SR for Student Records, as above. Following are the product codes:

> SR Student Records
> PT Prospect Tracking
> CS Career Services
> CM Customers
> AR Accounts Receivable
> FA Financial Aid
> IG Instructor-Grades
> LM Library Management
> BS Book Sales/Inventory
> DT Document Tracking
> SA System Administrator
> AL Alumni
> HS Housing
> IN Inquiries
> IG Instructor Grades

It will be assumed you will be entering a credit hour program for a term-based major. If this is not the case, make the necessary adjustments as you go along.

Critical data elements will be discussed below.

You need not enter all the fields.

Press **F6** to receive HELP when stationed at a data field; use **F4** to exit help.

For an entry to be retained after you type it, you must press **ENTER**. For example, if you are in field 1 of Student Entry and you type the student ID 123456789 and do not follow with the **ENTER** key, the system will not know that you typed it; in other words, the **ENTER** key is your EXECUTE command.

Also, watch your status bar for helpful hints!

Let's Begin....

· PT/SUPPORT FILES/SET-UP SUPPORT FILES/ ADMIN REPS

Add a rep using his initials as the rep code.

· PT/SUPPORT FILES/MEDIA CODES

Add a code for newspapers: N, Newspaper.

· PT/SUPPORT FILES/SOURCE CODES

Add the monthly expense of running your advertising in the newspaper you defined above. For example, DN200902 might be a code for the Daily News, February of 2009. Order the source code as in this example: media (DN), year (2009), month (02). Enter an 'N' for the media code in field three. If you are not entering old records from the 1900's, you can use '04' instead of '2004' as the year.

· PT/DATA-ENTRY/PROSPECT ENTRY

Enter a new lead. Place the letter N in the first field (the N tells the system that you are entering a new lead, and it will generate a lead number for you); then, input the last and first names in the next two fields. Select the source code you created and the rep code when the cursor reaches those positions. Include a date for the interview and the time in the following field. After entering the address, press **F4** and save the record.

· PT/REPORTS/INTERVIEW SCHEDULES

When you run this report, enter the date for which you scheduled the interview in the step above. Choose RS as your printer or LP if you desire a hard copy.

Note that RS represents Report Server. The Report Server provides output of your report to your screen monitor. From there, you can print it and/or save it as a file. A choice of LP will send your printout directly to your local printer.

·   PT/DATA ENTRY/INTERVIEW ENTRY

Call up the interview record the system created when you entered your prospect during Prospect Entry. Do this by entering the prospect code in field one and interview 1 in field two. Fill out the record to indicate the student has enrolled.

·   OTHER REPORTS

If you wish, take some time to print other reports available in this software module. They will be found on the following menu:

PT/REPORTS

·   SR/SUPPORT FILES/SET-UP SUPPORT FILES/
STATUS CODES

Enter three records such as the following:

E for enrolled. Accept all defaults.

A for active. Accept all defaults, except enter A for Status Type.

G for graduate. Accept all defaults, except enter G for Status Type.

·   DT/DOCUMENT ASSIGNMENT FILE

This file enables status codes to be generated and posted automatically as an individual moves through the student life cycle.

Put a 'Y' in the 'ON' column for EVENTS Enroll, Graduate, and Start. Also, enter the related status codes of E (enroll), G (graduate), and A (start) that you defined above; these three codes should be entered twice (once in the PROS STAT column and once in the STUD STAT column). Finally, enter a 'Y' in the UPDATE DATABASE column for these same three events.

· SR/SUPPORT FILES/SET-UP SUPPORT FILES/

CLASS CODES

Enter a code such as D for Day Students and/or E for Evening Students.

· SR/SUPPORT FILES/SCHEDULING SUPPORT FILES/

COURSE CATALOG

Enter a course number, description, and the credit hours. Then press **F4** to save the record. An example of a course number is ENG101.

· SR/SUPPORT FILES/SET-UP SUPPORT FILES/

DEGREE CODES

Add one degree code or diploma. An example of a code representing a degree might be CERT for certificate or DIPLO for diploma.

· SR/SUPPORT FILES/SET-UP SUPPORT FILES/

MAJORS

Add one of your programs. If the same program is offered day and evening and the lengths of attending differ, you will need to enter the major twice; once defined as the day version and once for the evening. Critical fields are as follows:

> Degree Credits (graduation requirement)
> Degree Code (for example CERT or DIPLO)
> Length Code ('M' for months)
> Length (number of months to complete program)
> Credits/Clock Hours ('C' for credit hours)
· SR/SUPPORT FILES/SET-UP SUPPORT FILES/
ENROLLMENT STATUS

Add a record for the Major you added above. Provide the credit loads for full-, three-, and half-time.

· SR/SUPPORT FILES/SET-UP SUPPORT FILES/

GRADES

Add a grade used by your school: e.g., A. Enter a point value of 4.00 and take the defaults for the other data elements.

·   SR/SUPPORT FILES/SET-UP SUPPORT FILES/

RACE CODES

Add at least one race code you will use when you add your test student, for example, 'A' for Asian.

·   SR/SUPPORT FILES/SCHEDULING SUPPORT FILES/

TERM CODES

Refer to Term Codes earlier in this manual for a discussion on suggestions for setting up your term codes. A term code for the Spring of 2009 might look like 091 or 20090315 (3/15/09).

·   SR/SUPPORT FILES/SCHEDULING SUPPORT FILES/

SECTION CODES

A section code is used to define a valid occurrence of a course. For example, ENG101 might be offered more than once; thus, you would have section A and section B of ENG101.   Define Section A here by adding one record. Field 1 would contain the letter 'A' and field 2 would simply say Section A (the other data elements are normally not required).

·   SR/SUPPORT FILES/SCHEDULING SUPPORT FILES/

INSTRUCTORS

Add one instructor who will be the teacher for the course you have created in the Course Catalog. Only the first two fields are required unless you plan to print mailing labels to instructors.

·   SR/SUPPORT FILES/SCHEDULING SUPPORT FILES/

PERIODS

Period codes are used to define blocks of classroom time. Make up a code such as P1 and add this record. The description is what the student will see on a printed schedule and should look something like the following: 11:30 am - 1:30 pm.

It is very important to put fields three and four in as military time since conflict processing will require this. The 'Hours' field is used by the attendance and scheduling modules.

· SR/SUPPORT FILES/SCHEDULING SUPPORT FILES/

HOLIDAYS

Enter the days of the year that are holidays. A holiday is defined as a day the school is closed when, typically classes are held on that day. For example, if classes are held on Thursdays and Fridays, and the school is closed for Thanksgiving and the day after Thanksgiving, enter both of those days as holidays.

· SR/SUPPORT FILES/SCHEDULING SUPPORT FILES/

COURSE SECTIONS

This is your master schedule for the term you are creating. Enter your term code, the course you created in the Course Catalog, and the section you defined in the Section Codes File.

In the fields labeled MONDAY through SUNDAY, specify the periods during each of those days of the week when the course will meet. For example, if the course meets Monday, Wednesday, and Friday during period P1, the screen would look as follows:

Monday   P1
Tuesday
Wednesday   P1
Thursday
Friday   P1

· SR/DATA ENTRY/STUDENT ENTRY

You will now input your test student. Although you can simply add a new student who was never a lead, try using the **F5** key to move your prospect to the Student Records module. After you respond 'Y' to "Add to Student Database?" enter a student ID and press **ENTER**.

Demographics. Enter the SSN. If you do not need to modify any other information on this screen, press **F4** and save the record. Press **F4** again and you will exit Demographics.

Admissions. Enter at least the following data fields: Enrollment Date, Expected Grad Date, Major, and Class. Press **F4**, save the record, then press **F4** to back up.

Personal Information. Enter at least Gender, Race, Citizen, and date of birth. Press **F4**, save the record, then press **F4** until you exit Student Entry.

· SR/DATA ENTRY/SCHEDULE ENTRY

You will now schedule your student into the course you previously defined. Enter the Student ID or press **F2** to search for the student by name. Enter the Term Code and **ENTER** through the two remaining options (Block and Section).

A screen will open with the term code populated. Place the Course Number in the Course field. In the section column, press **F3** and you will notice a list of sections for that course for the term selected will be displayed. Choose the section you had created.

After your course and section have been selected, press Page/Down to get to the update prompt. Press **F3** and the schedule will be saved and printed.

· SR/REPORTS-SCHEDULING/CLASS ROSTERS

Print the class roster for the course you scheduled. Enter 'C' for Data Type, then the same course number twice. Choose your Term Code, Week-Of 010101, and press **ENTER** through the remaining options.

·   SR/ATTENDANCE/ATTENDANCE ENTRY

Enter the first date your course was to meet (MMDDYY). Then input the term, course number, section, and period (all this information will be found printed on the roster). Your student should appear on the screen.

Attendance Code: Mark your student absent by placing an 'A' in this column. After pressing **ENTER** press **F4** and you will be asked: "OK TO UPDATE?" Respond 'Y' and your entry will be posted.

Before exiting the program, let's mark your student present for the next date the course is to meet. Enter that date, and press **ENTER** to accept the defaults for the other prompts.

Attendance Code: No entry will mark your student present. Simply press **F4** for the code and you will be asked: "OK TO UPDATE?" Respond 'Y' and your entry will be posted.

·   SR/ATTENDANCE/UPDATE ATTENDANCE

Execute the update function and put a date range in that will include the two dates for which you entered attendance, previously.

·   SR/ATTENDANCE/ATTENDANCE REPORTS/
         ATTENDANCE RATE REPORT

Let's find out what students have missed more than 10% of their classes. Enter 'N' and then blanks for Start At and End At. Enter the term code you have been using, then accept all the defaults except enter 10 for the Cutoff Percent and 'Y' for Set Probation Flag.

This report should print your student and also put him on Attendance Probation because his absent rate is 50%. You can find the Attendance Probation Y/N flag in Student Records / Data Entry / Student Entry – find your student in Student Entry, then pick Academics from the pop-up menu and you will see the Attendance Probation flag.

·   SR/DATA ENTRY/GRADE ENTRY

Specify the term, course number, and section and the roster for the class will appear on the screen. Give your student a grade for the course and press **ENTER**. Then press **F4** and update your entry.

· IN/ACADEMIC RECORDS

Select your student and his term code. You will then see his information for the term and cum, including the course and grade he received. Start this process again, and press **F3** at the Term Code field instead of entering a term; this will print the transcript for you.

Note the text that prints at the foot of the transcript. This block of text can be modified by you on the following screen:

SA/SUPPORT FILES/TEXT OPTIONS

In the Text Options file, press **ENTER** when stationed on the 'T' in field #2. The text block will open for you to make modifications.

· IN/ATTENDANCE

Select your student and his term code. Then press **ENTER** to display his attendance or press **F3** to print it.

· IN/STUDENT STATUS RECORDS

After choosing your student, his status records will be displayed. His current status should be 'Active' and there should be two historical status records (Enrolled and Active).

· SR/REPORTS-ACADEMIC/POPULATION REPORT

Enter start and end dates that will include the start date of your student. **ENTER** through the defaults and print your report. Your student should show as an active student.

· SR/DATA ENTRY/STATUS ENTRY

Our student will now graduate. Input a G for the status code (the Type will default to G). Enter your term code, press **ENTER** for the Entry Date, and put the student's graduation date in the Effective Date field. For the Degree Code, enter the code you defined earlier (**F2** will look-up the record for you).

Enter your student's ID number. Then **ENTER** through all other fields and choose 'Y' to Update The Record.

Looking back at previous steps, you might wish to see that your student graduated. Run the Status Inquiry on the Inquiry Menu, and the Population Report on the Student Records / Reports Academic Menu.

·   OTHER REPORTS

If you wish, take some time to print other reports available in this software module. They will be found on the following menus:

·   SR/REPORTS-ACADEMIC and

·   SR/REPORTS-SCHEDULING

·   AR/SUPPORT FILES/SET-UP SUPPORT FILES/ TRANSACTION TYPES

Enter two transaction types in this file. The first will be for tuition billing followed by a transaction for a student payment.

Create a transaction type that has the letter 'T' in the first position (for tuition) and the first letter of the major as the second character (e.g., 'B' for Business Management). Thus, the transaction code of 'TB' will be used whenever you charge a student for tuition in the Business Management major.

Enter a short and long description in the next to fields. Take all defaults except place a 'Y' in the Tuition Transaction field and a 'B' in the Restricted Use field.

For a student payment transaction, you might use a code such as 'SP.' Enter a short and long description. Take all defaults except place a 'C' in the Restricted Use field and a 'Y' in the 1098 Type field.

·   AR/SUPPORT FILES/SET-UP SUPPORT FILES/

      BILLING CHARGES

Now you will define how tuition is charged for the major you created earlier. Start by entering the term code and major code. The next field is the Charge Code, and this code tells the computer how tuition is calculated for this major.

Charge Code C: You are charging by the credit hour. Enter a 'C' and put the charge per credit in the next field.

Charge Code T: You are charging one amount for the entire term. Enter a 'T' and put the cost for the term in the next field.

Charge Code Y: You are charging one amount for the entire program. Enter a 'Y' and put the cost for the program in the next field.

Charge Code X: You are charging by the course. Enter an 'X' and put the cost of the course in the record of the Course Catalog File in the Tuition field.

Charge Code L: The cost of tuition varies on the number of credits for which the student is enrolled. Refer to the AS3 Manual under Variable Billing for an explanation of this type of billing.

In the Tuition Billing Transaction field, place the transaction type you created earlier for charging tuition (our example was 'TB'). You can use the same code to do tuition refunds in the next field; otherwise, go back and create a different transaction type for tuition refunds (perhaps a code such as 'RB' in this example).

For this exercise, leave the other fields of this record blank. Update the record and you are ready to charge your student for tuition.

· 	AR/DATA ENTRY/AUTOMATIC BILLING

This program enables you to perform all your tuition charges for a new start in one simple procedure. Enter 'S' for Process By, and the Term Code in the appropriate field. No other fields require any information except 'N' for the Course Catalog prompt. (Note that you are able to bill other related charges, e.g., Registration Fee, Lab Fees, etc. during Automatic Billing, but the setup of those charges is not included in this Quick Start appendix–see Billing Groups File).

· 	AR/DATA ENTRY/BILLING JOURNAL

Run this report for all dates and update the results (**ENTER** through the date range). The transactions will move from the temporary Billing Edit File to the permanent A/R history transactions.

· 	IN/ACCOUNT CARD

Enter the Student ID and **ENTER** through the fields until you reach the Term Code. Press **F5** for the term then **F3** for a hard copy. This will produce a statement for the student showing the tuition billing charge. After the printout, you can press **F4** until you return to the menu.

·   AR/DATA ENTRY/CASH RECEIPTS

Press **ENTER** for the date, input your term code, then the Student ID. Place your student payment transaction type in the next field followed by the amount being paid by the student. **ENTER** through until you get to the UPDATE prompt.

·   AR/DATA ENTRY/CASH JOURNAL

Run this report for all dates and update the results (**ENTER** through the date range).   The transactions will move from the temporary Cash Edit File to the permanent A/R history transactions.

·   IN/ACCOUNT CARD

Enter the Student ID and **ENTER** through the fields until you reach the Term Code. Press **F5** for the term then **F3** for a hard copy. This will produce a statement for the student showing the cash receipt.

·   AR/REPORTS/AR AGED TRIAL BALANCE

Run this report for all students (S), answer 'Y' for Details and Zero Balances, and take the defaults for the other fields. Your student and his two transactions should print.

·   OTHER REPORTS

If you wish, take some time to print other reports available in this software module. They will be found on the following menu:

AR/REPORTS

·   AR/SUPPORT FILES/SET-UP SUPPORT FILES/ TRANSACTION TYPES

Enter two transaction types in this file. The first will be for a Pell Disbursement followed by a transaction for a Pell refund.

Create a transaction type that has the letter 'P' in the first position (for Pell) followed by a 'D' for disbursement. Thus, the transaction code of 'PD' will be used whenever you disburse Pell.

After entering the two descriptive fields, place a 'Y' in the Financial Aid field and an 'F' in the Restricted Use field. Take the defaults for all other fields.

Next create a transaction type of 'PR' for Pell refund. Answer the prompts in the same manner as you did for 'PD.'

· FA/SUPPORT FILES/SET-UP SUPPORT FILES/

FUND CODES

Enter a record for Pell. Place PELL in field one, and Pell and PELL in fields two and three. Enter a 'G' for grant and 'Y' for Title IV. Place the two transaction types you created in the next two fields, the first for the disbursement then the refund. Take the defaults for the additional fields.

· FA/SUPPORT FILES/SET-UP SUPPORT FILES/
   DISBURSEMENT CONTROLS

Add a record for the fund code you added in the prior step. Enter a 'Y' in every field – note that this will enable the disbursement to be released under all conditions. Later, you will want to come back to this record and place 'N's in fields that matter to your institution.

· FA/DATA ENTRY/STUDENT AWARD YEAR

Add a record for your student. The only fields required for the system to function are the first two. Enter the Student ID and the Award Year you will package.

· FA/DATA ENTRY/PACKAGING

In this program, you will input a Pell disbursement. Enter the Student ID, skipping the other fields on the initial screen. After you press **ENTER** at the Packaging Block field, the Packaging Details screen will appear.

On the first line, enter the two-digit award year (e.g., 06), then follow with PELL as the Fund Code. **ENTER** through the Award Number and Disbursement Number then place amount to be disbursed in the next column.

Place a term code in the Term column. This can, but does not have to be an academic term code tied into scheduling. You can create term codes that are used for financial aid and not scheduling (see Term File). The dates will fill in automatically and you can simply press **F4** and update the disbursement. If you choose 'P' at the update prompt, the Award Letter will print.

·   AR/DATA ENTRY/FINANCIAL AID/

AUTOMATIC DISBURSEMENTS

From this screen, you will begin the disbursement process for the Pell payment. Process your student and choose PELL and the award year you used when doing the packaging. For the AR Comment, enter something like the following:

Pell Payment Term XXX

(where XXX is the term code you have been using).

The purpose of this process is to validate and prepare the disbursement for payment. If it passes your tests in the Disbursement Controls File you will receive a report of disbursements ready for payment; otherwise, you will receive a report of disbursements on-hold.

·   AR/DATA ENTRY/FINANCIAL AID/

PAYMENTS JOURNAL

Print and update the journal for Pell and your award year. This will post the Pell payment to the student's account card.

·   IN/ACCOUNT CARD

Enter the Student ID and enter through the fields until you reach the Term Code. Press **F5** for the term then **F3** for a hard copy. This will produce a statement for the student showing the previous transactions and the new Pell payment you just posted.

·   OTHER REPORTS

If you wish, take some time to print other reports available in this software module. Reports are available on the following menu:

FA/REPORTS

·   CS/DATA ENTRY/COMPANIES

Enter an employer where your student will interview and hopefully become employed. The code you create can be a portion of the company name, with a zero at the end to handle duplicates (for example, AMERICAN1 for American Can Company and AMERICAN2 for American Amusements, Inc.).

Enter at least a name for the company and press **F4** to update the record.

·   CS/DATA ENTRY/JOB BANK

Enter a new job that has become available. Enter the company code defined above and Job Number 1. Populate fields 3 through 7, then press **F4** and update the record. This job is now available for which your student can interview.

·   CS/UTILITIES/IMPORT CANDIDATES

This procedure can be used to copy one or more students from the Student Records module to Career Services.

The most popular way to do this is to process all students by N for name, then enter an 'E' for Expected Grad Date. Input a date range that will include the expected graduation date you entered during Student Entry on the Admissions screen. Take the remaining defaults and make certain you respond 'N' to Prospective Grads.

A report will follow showing you that your student is now in Career Services.

·   CS/DATA ENTRY/CANDIDATE ENTRY

Call up your student in CHANGE mode. You might prefer to add additional information.

·   CS/DATA ENTRY/CANDIDATES HIRED

To have your student become employed at the company with the job you defined, add a record to this data file. Enter the candidate ID, a job ID of '1', and the company code. You can look up the job number with the **F2** lookup key.

Be sure to enter the job information in fields 5 through 10. Then press **F4** and update the record. Your student has now been employed.

·   CS/REPORTS/PLACED REPORT

This report provides statistics related to your Career Services efforts. Run this report, answering the prompts in a manner that will include your student.

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· OTHER REPORTS

If you wish, take some time to print other reports available in this software module. They will be found on the following menu:

CS/REPORTS

End of Manual