Café Web Student Services Help Document

Contents

Introduction

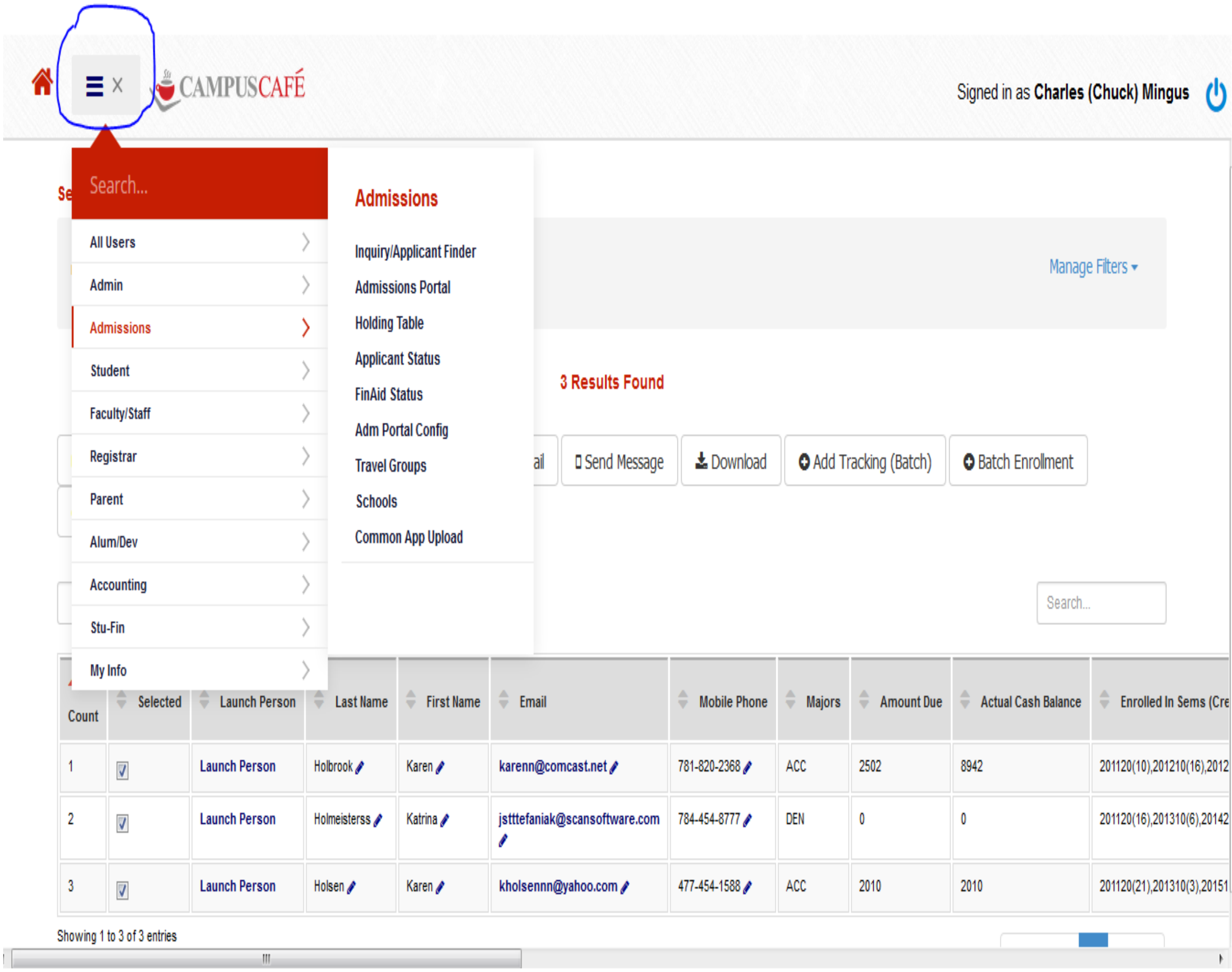
Campus Café Web services is a self-service interface that allows students, faculty, advisors, and administrators to access and update information based on their permission level. For example, students can view classes, schedules, transcripts, degree audits, enrollment history, contact information, hold code information, billing statements, degree information, exam schedules, and other relevant information. A student may also make on-line payments, and update certain information on their student record with the appropriate permissions.

Faculty can view their rosters, (with each roster they may view student pictures, send emails to the class and enter grades), view course listings, faculty schedules, and other information within their permission group.

Advisors can see all of the same information that a student sees for their advisees and also set parameters and permissions for self-registration by students. An advisor can also view pictures of the advisees and send emails to all students in their advisee list. Their advisee list can be expanded depending on their permission (Advisor perm 917, Department Chair perm 918, All perm 919).

A budget administrator can view their cost center on line to get up to date information on spending, remaining budget, encumbrances, and account balances.

Navigation and Permissions



The menu system includes options that the user may perform based on their permissions. The lower portion of the of the page is a customizable page stored in the database as a CLOB (Character Large Object). You may also include custom head elements via a new CLOB CUSTOM_HEAD_INCLUDE. The elements can be any valid head elements, but the primary purpose of this implementation is to give the customer the ability to control/include their own cascading style sheets and java script. The style sheets can come in via the <style> element and thus be included right on the page, or they can be referenced via the <link> element whereby an external file will be loaded (the href, as always, must be absolute). The javascript, likewise can be an external file or a snippet included right in the clob.

Campus Café Web offers a permission based navigation system to enhance the user's ability to access functions within the Web Interface. The navigation bar will allow the user to easily navigate to any section of the application.

There are also many other user defined areas for customizable web content. These areas (sometimes referred to as CLOBs, (Character Large Objects) will allow the administrator to add content through the Web Adjustable Text option on the Campus Café System Admin Menu, and then have that content appear within the web displays.

The Café Web module is broken down into smaller parts (modules). This is necessary to minimize the number of restrictions that must be inserted into a security group. These modules can be thought of as roles within the security group. By creating a module level, it is now possible to "permit" a module implicitly. The user is then only able to access the objects in that module. The security administrator may then remove or restrict the user from functions within that module as necessary.

The two basic levels within SYPOBJ security file are the module and the objects within that module. The module (or role) is given by permission. The functions within the module can be removed to restrict a user from that function.

Please be aware that some security object permission govern access in both the client and the web version of café. For example, if a user has access to the transcript, then they would have access to it in both interfaces.

Additionally, the SYPOBJ contains a container group. This further categorizes the security objects into logical groups such as registration, systems, faculty options etc.

The current SYPOBJ object functionality has been broken down for Web into modules.

ALL	-	All	example - public course listing
SY	-	System	example - user account lookup
AD	-	Admissions	example – Admissions Inquiry Portal

The following four additional modules should be thought of as a hierarchy in this order for purposes of setting up logical groups.

ST	-	My Info	example - register for classes, view degree audit
FC	-	Faculty	example - edit own faculty record
AV	-	Student	example – approve student to register
RG	-	Registrar	example - grade control maintenance

This has been done to minimize the number of individual restrictions that are required for a user.

For example, we have assumed that only the registrar will perform grade control maintenance. This would never be given to a ST, FC, or AV. Therefore, the ST, FC, or

AV will implicitly not have access to this function since they will not have the RG module in their group.

A student may register for classes, but an advisor or a registrar may also register for them. The registrar or faculty/advisor might also be a student themselves. The registrar and the faculty/advisor would have the AV module granted in their group so they can act upon others (i,e. students). The registrar or faculty/advisor would only need ST (My Info) if they are themselves a student.

Additional Navigation scheme notes for Campus Café Web:

The navigation scheme is designed with two menus and three task sets. The main menu (Main Menu) holds the modules and the sub menu options holds the tasks for those modules.

The three task sets include:

- 1. Non person related tasks such as updating control and configuration files.

- 2. Other person tasks such as advising a student, a parent looking up student, updating an address, viewing another person's transcript. This mode can only be accessed from a people finder and launching the person. The only way to exit this mode is to return to the main menu or to the people finder listing. By default, you will not see any students in the student finder. Permissions will exist in the student module and can be assigned to groups for all, advisor, department chair, and parent. For example, if you have permission = can see advisees, you will be constrained to only your advisees. The multi-department file will constrain department chairs. THE USER MUST EXIST IN THE FACULTY/STAFF MODULE IN ORDER TO VIEW OTHER PERSONS IN THE DATABASE. This is a safeguard to ensure that students can never access data for anyone but themselves.

- 3. Self-service person tasks for a prospect or student. These tasks will be accessed through the My Options link on the main menu. Once you are in this mode, the only way to exit is to return to the main menu.

  The my options items would include:

  My student options - only viewable if you have an STMAST record.

My applicant status – only viewable if you have and ADMAST record.

My faculty schedule – only viewable if you have an FCMAST record.

Parent portal – only viewable if you have an ALMAST record and a PAR relationship.

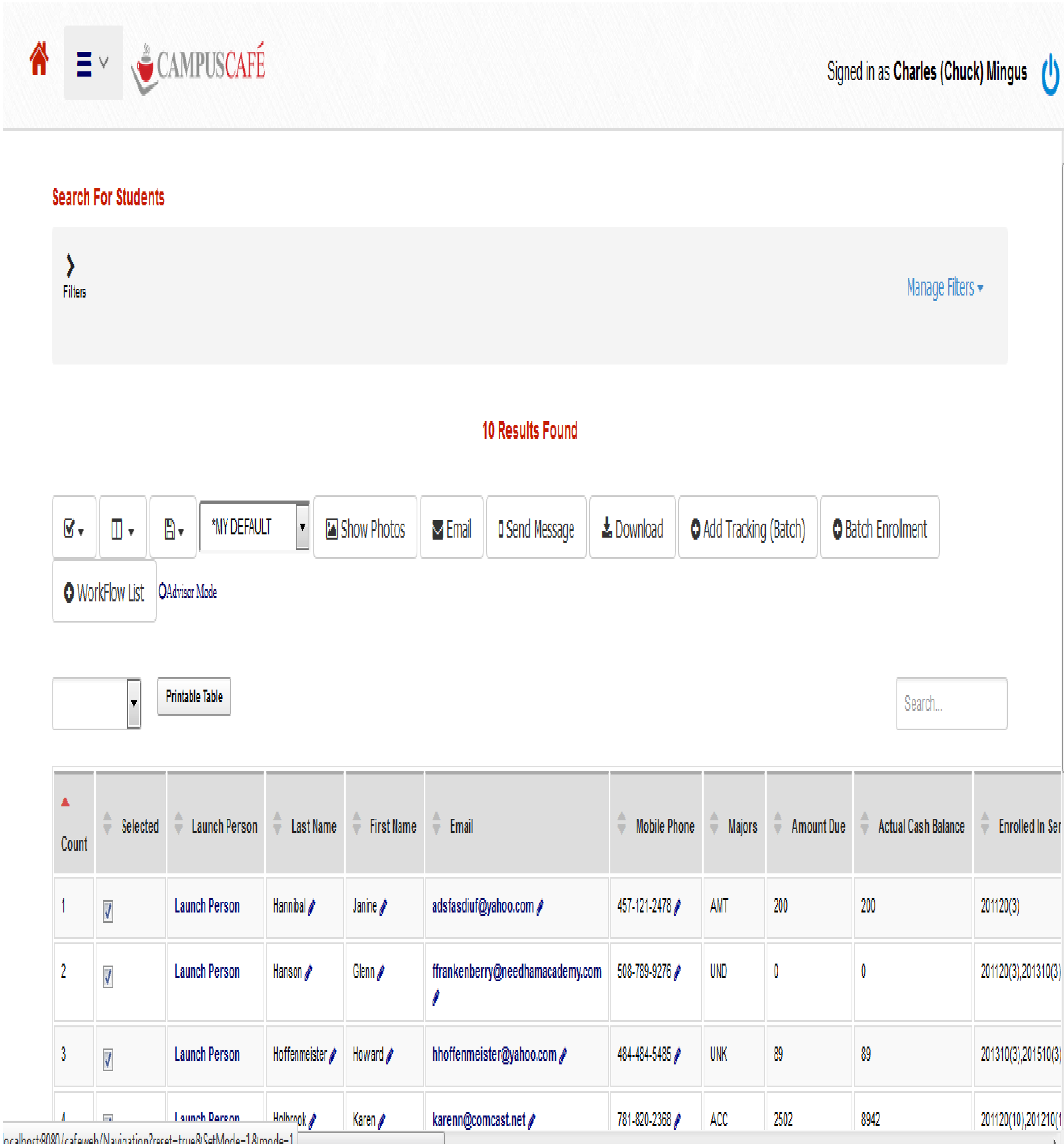
Each of these four functions would also be governed by a permission that would allow access to the item.

Campus Café Web Based People Finder and Administrative Functions

The Campus Café People Finder is used to locate a person or groups of people record from the database using a web based search. In addition to drill down capabilities on an individual record found in a search, common functions may be performed on the group such as email, export, display pictures, batch adding of activity tracking items and displaying/managing of outstanding work flow items such as reminders, phone calls to be made, letters, emails.

The people finders have a fixed number of filters and there may be a situation where you wish to use the people finder functions (activity tracking, letters, emails, exporting, pictures, etc.), but you are unable to derive the exact list of people using the available filters. For this reason, an import function is available on each people finder. A browse button is provided to assist in locating an external spreadsheet or csv file that can be loaded into the people finder. This spreadsheet can be created with an external data source such as a Crystal Report ™, or other query tool.

Once a person is located, the launch person function is used to display the person's contact information page and the "red bar" menu that will allow the user to access various data elements and functions for that person.



There are six people finders available for searching. These include Admissions Inquiry/Applicant, Student, Alumni/Development, Faculty, Parent, and All People. All display grids will show some common information such as first and last name to help identify the record. The other information on the display grid within each search page will vary and display information that is relevant to the group within each search. For example, on an admissions search, you would see progress code, entering semester, and inquiry date. On an alumni search, you might see class year, constituency, and solicitor.

The query tool provided will allow you to search for groups of people using standard query logic. For example, if you select State (is one of) and list three states, then the result set will include only people with that state in their address field within the database.

A result list will have the selected check box to the left of the row checked as the default. You may unselect certain records if you are performing a batch function on the group and wish to exclude certain records.

Each column on the grid has a sort function that will allow you to reorder the data displayed within the grid.

The people finder also has a number of results and a number per page function. This will allow you to alter the amount of data you wish to retrieve. You should only retrieve the number of records needed for the current task. Increasing the search results to very large number will affect system performance, so the default settings are typical for normal usage.

Additional functions exist within specific search pages that pertain to the group within that search. For example, within the student search, there is a function for batch updating advising approvals.

The launch person function within the grid will allow you to drill down into an individual person's record. The landing page for the person will contain basic biographical information. Additional buttons on the person page will allow you to access other functions within the appropriate module such as viewing, updating, and deleting information for the person.

Saving display settings on People finder grids:

All people finder grids now allow saving of the grid display settings (column positions, sort order, and search box). The user can save different settings for different purposes. For example, one setting might be saved for viewing student balances and you would want to see the balance column to the left. Another setting might be used for viewing enrollment information and you would want to have enrollment figures to the left.

Each saved named is specific to an individual user, and an individual people finder. Upon page load, it will search for *MY DEFAULT for the user and the table, if none found it will load the system default.

When changing the column order, search box value, or column sort, the drop downs will change to *CURRENT. At any point the user may enter a new name to save the current table state. They can also overwrite any previous setting, including *MY DEFAULT.

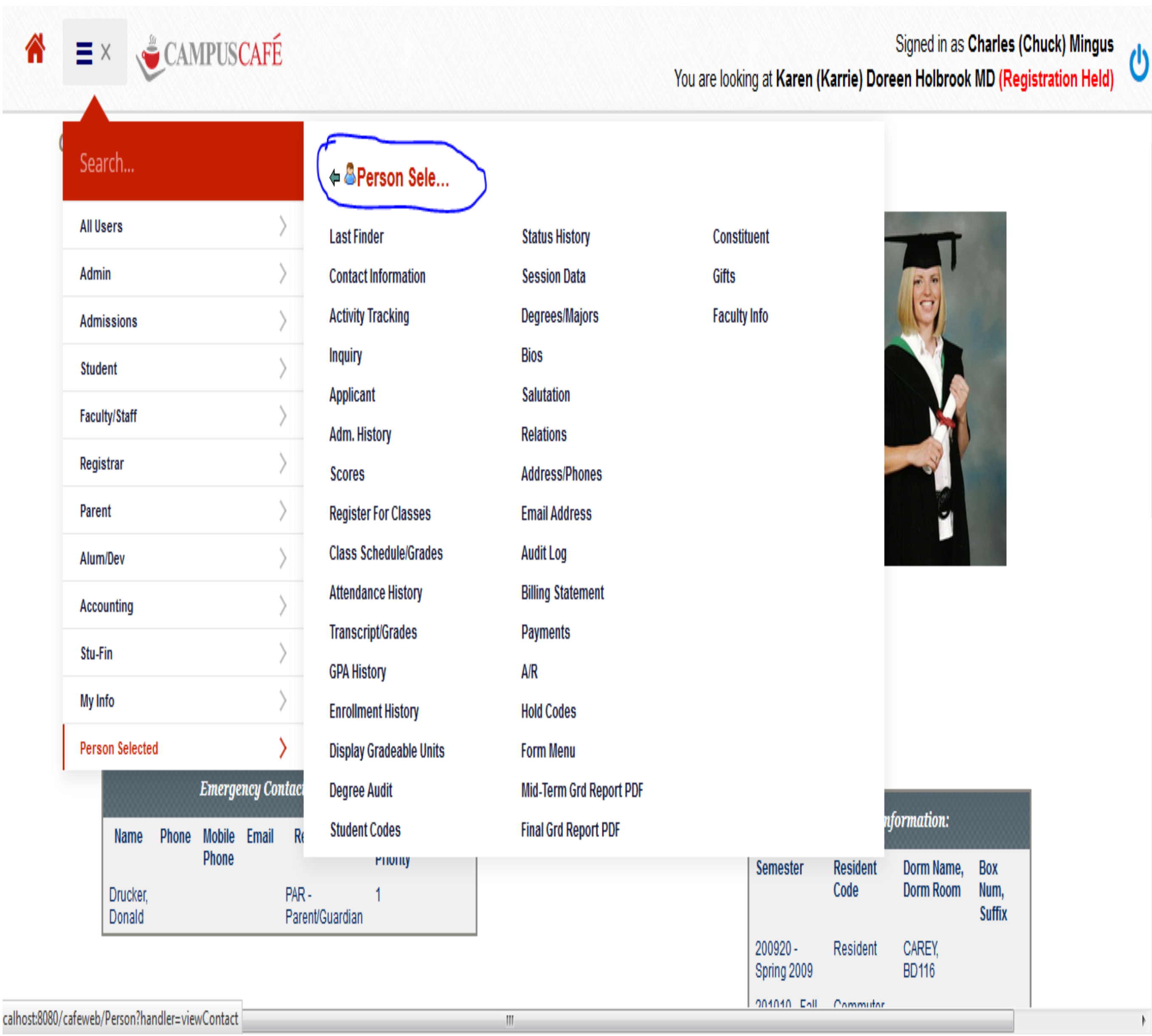
To save *MY DEFAULT, type *MY DEFAULT into the save box and click save. You can overwrite the *MY DEFAULT in the same manner.

Table settings can be deleted as well. The icon to the left of the save settings drop down is used to save or delete user defined display settings.

Common Functions help documentation

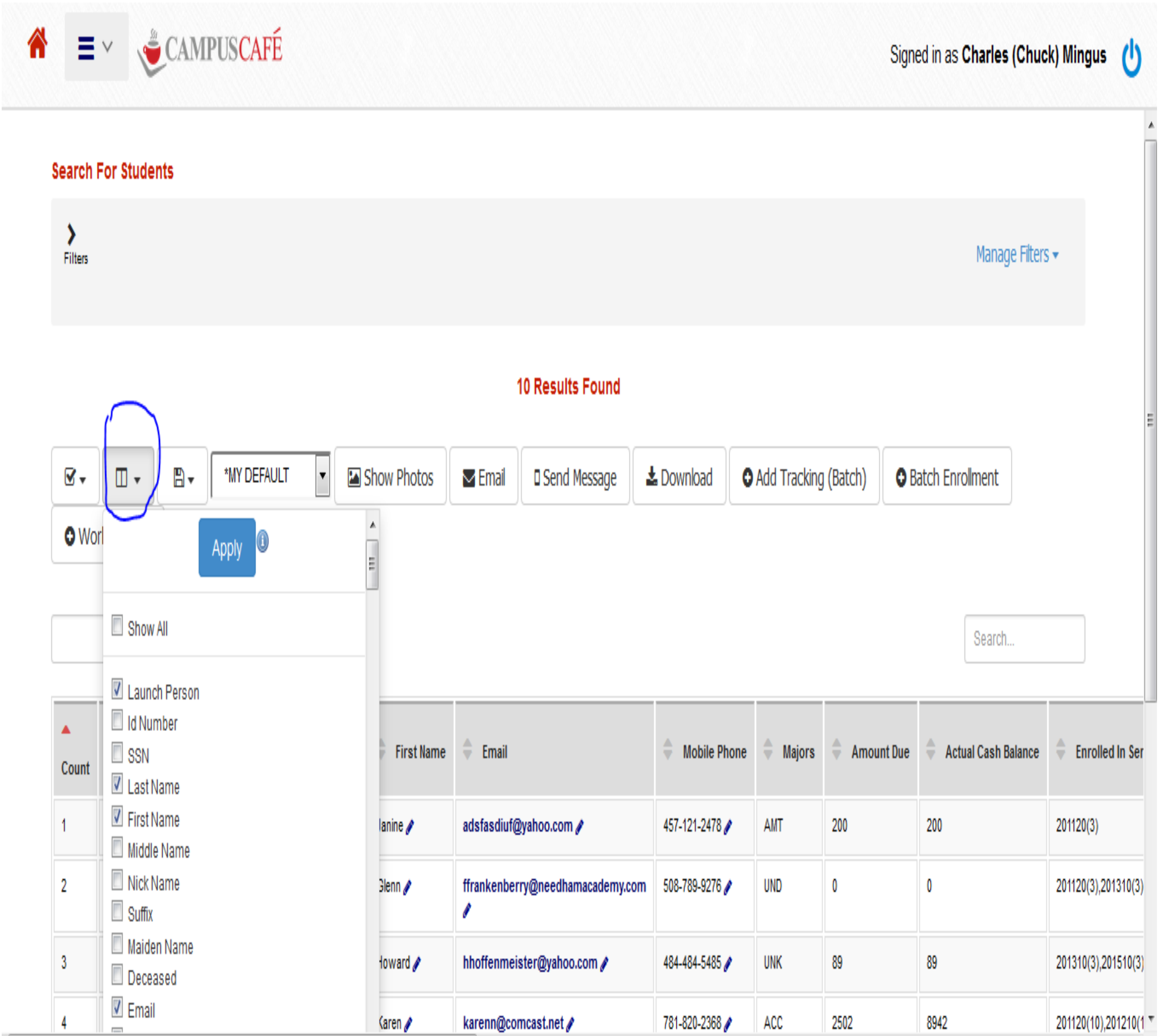
Next/Last feature

In the highlighted area below, the arrows can be used to fetch the previous or next person from the people finder listing. This can be useful if you are view details or updating records for a set of people. Clicking the previous arrow will bring you to the prior person in the list. If you are at the beginning of the list, then it will “wrap” and fetch the last person in the list. If you have a sub-page open (e.g. email, billing statement, etc.) it will stay on that detail page as you navigate backwards and forwards.



The following pages describe usage of the common functions for which there are buttons at the top of each search page.

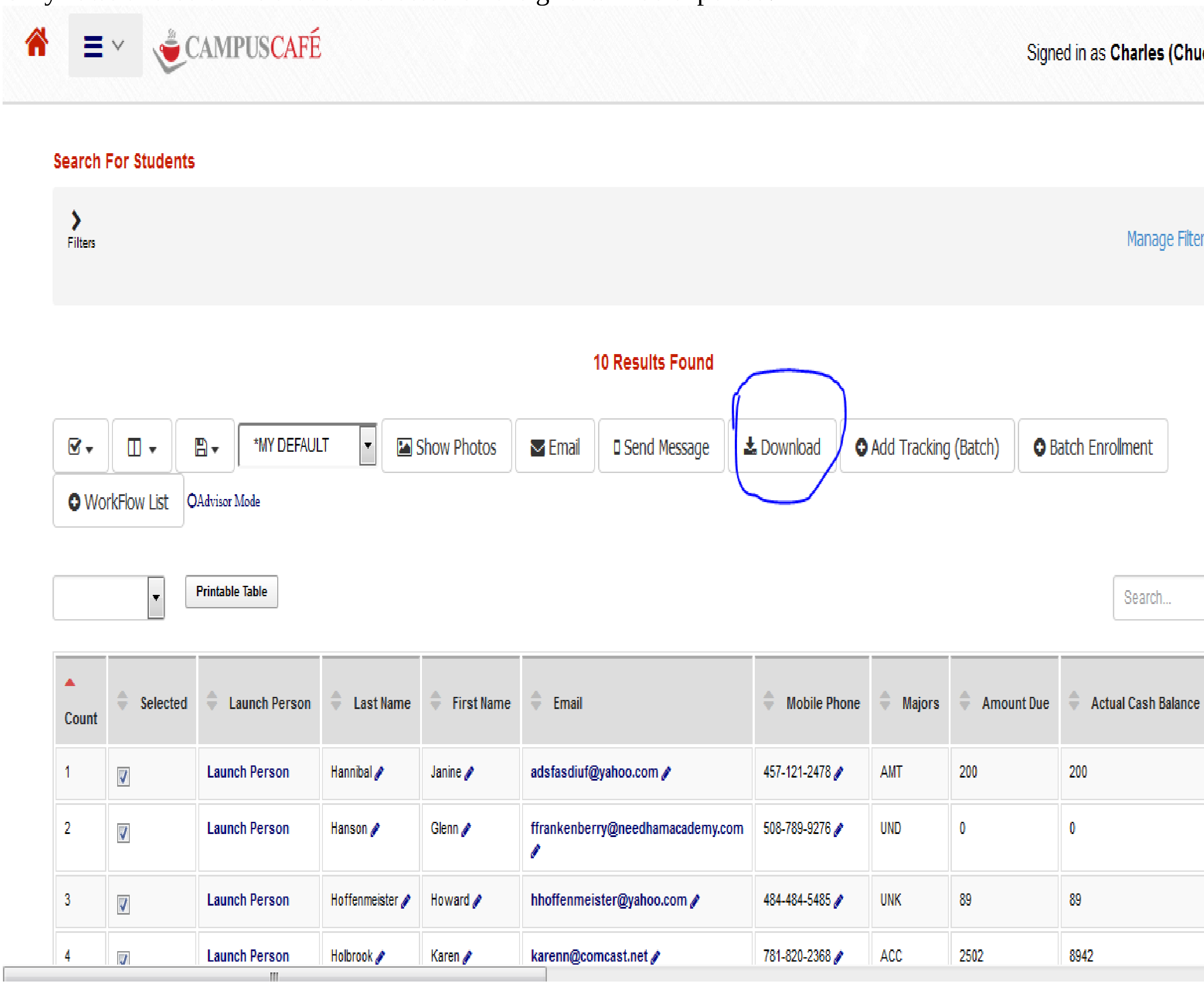
Adjust Columns:



This function allows you to hide and display columns on the display grid. This can be used to better organize your data and isolate columns needed for the current task. More importantly, the export will only contain columns that you include on the grid.

Download/Export data

This function will allow you to export the data from the grid to an excel spreadsheet. Only rows and columns that are selected on the grid will be exported.



Show Photos/Display Pictures

There are several ways to integrate student pictures within the Campus Café solution. This function will display pictures for anyone selected that has a picture integrated with Café Web. This picture typically is retrieved from a file system of pictures located in a place with the webserver can access the picture. The following is a guideline for the integration of student pictures:

MSPARM IMAGE_BIOS replaces all previous solution for picture integration.

Parm 1 indicates the method of integration:

Configurable values for this Parameter include:

CFG_BIOS_SYUSER_IMAGE_LINK = 1;

There is a column in the SYUSER table that allows you to store a URL to the student picture.

CFG_BIOS_INTERNAL_DB = 2;

The pictures are stored in the Café Web database itself. Pictures would be loaded into Campus Café.

CFG_BIOS_WEBINF_INNER_IMAGES = 3;

This configuration option allows you to store the images as some type of image file on the webserver itself. For example, create a folder called “studentpics” under the WEB-INF folder in your cafeweb installation. The advantage here is that images located under the WEB-INF folder can only be accessed by an authenticated user and cannot be accessed through external URL manipulation.

CFG_BIOS_EXTERNAL_DB = 4;

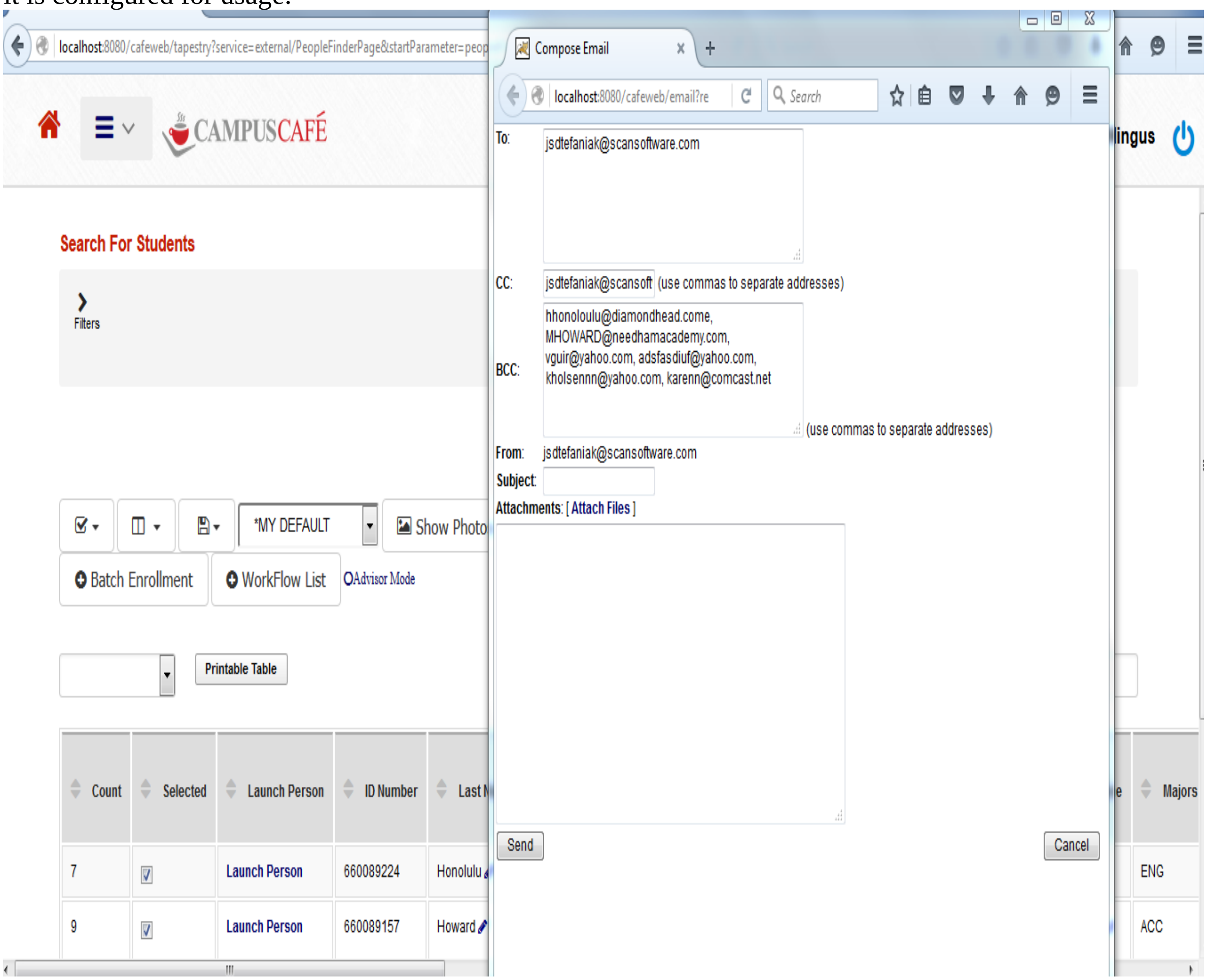
This option allows you to point Campus Café to an external database of pictures. This parameter requires you to additionally configure the Cafeweb db.properties file with the url2, user2 and password2 parameters respectively.

CFG_BIOS_CAFEWEB_IMAGES = 5;

This parameter allows grandfathered use of the previous student pictures directory location. Usually located in the ../cafeweb/images directory for most schools.

Email Selected People (default)

This function will create an email list for all people displayed on the grid. If there are missing email addresses or improperly formatted email addresses, a warning dialog box will appear. Upon proceeding, your default email client will appear with the email list populated from the grid. You may also use the email client provided with Campus Café if it is configured for usage.



Add activity tracking items batch

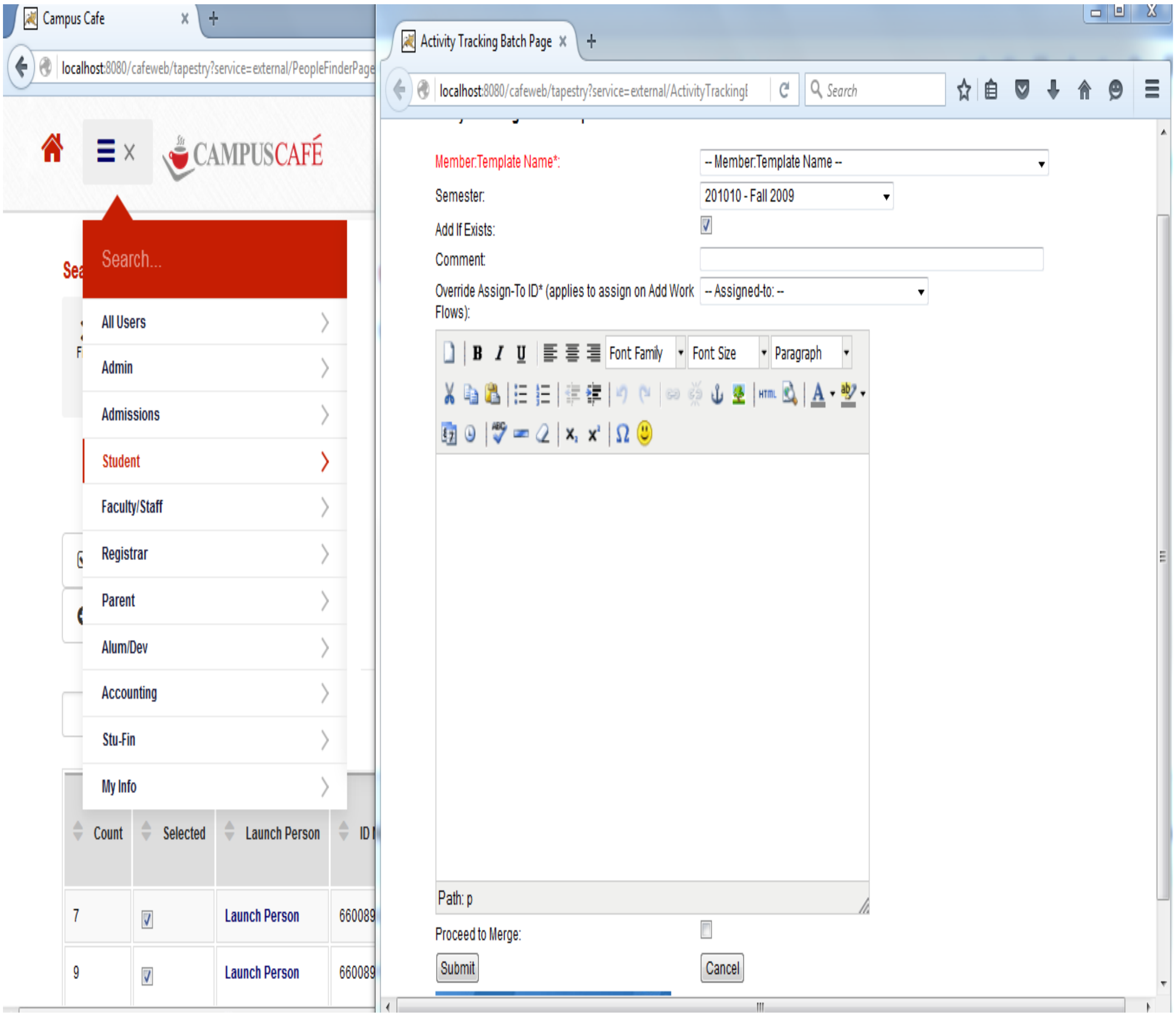
This function will allow you to add a batch of items to the activity tracking system based on the people selected in the grid. Enter the name of the template you wish to add to tracking. For example, you may wish to add a phone reminder to call the 10 people on list in 10 days. You can pre-configure an activity tracking template called PHONE10 that will contain a work flow phone reminder that will be due in 10 days.

You may also select a semester to be added to the work flow items.

Check the “Add If Exists” button if you wish the record added to the person’s record even if they already have a template with the same name.

Add tracking items batch-sending personalized emails/letters

This function will allow you to add a batch of items to the tracking system based on the people selected in the grid. Enter the name of the form you wish to add to tracking. For example, you may wish to add a phone reminder to call the 10 people on list in 10 days. You can pre-configure a form called PHONE10 that will contain a phone reminder that will be due in 10 days. You may also add a semester if you wish the tracking items to that data element. Check the “add if exists” button if you wish the record added to the person’s record even if they already have a form with the same name.

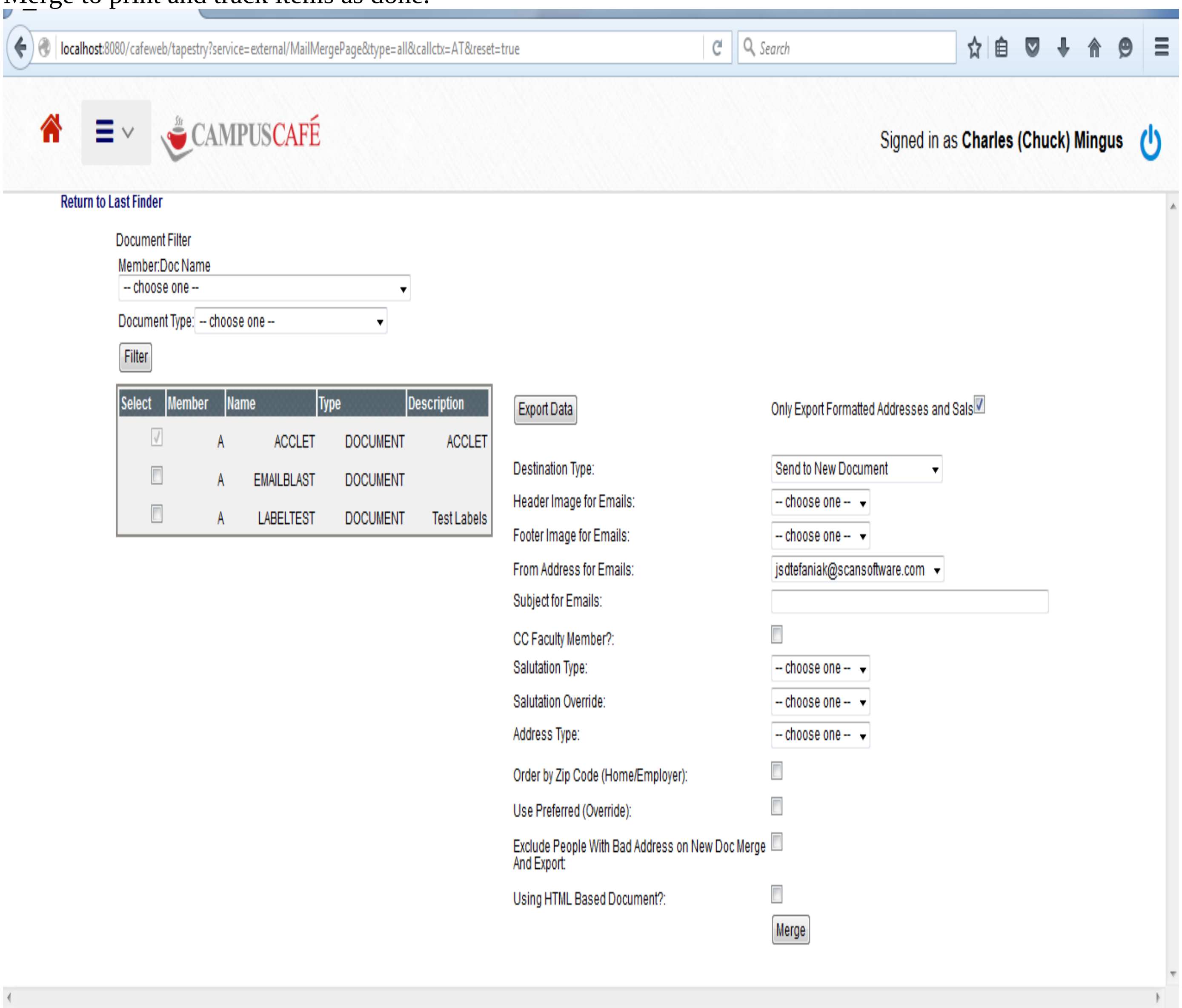


You may also wish to send a personalized email/letter to everyone on the list and automatically store the contents of your communication in the activity tracking system. The text area above will allow you to type the contents of the email you wish to send. You may then select a template name (e.g. MS Word document = EMAILBLAST) from the drop down list. This document may contain merge fields to personalize the email (name, title, etc.). It may also include a special merge field called COMMENT_BOX that contains whatever is entered into the text area.

Checking the “proceed to merge” box and then using the submit button will send the email (or create the letter depending on the options chosen on the mail merge interface that comes next). This process assumes that the email relay system has be set up and the mail merge document system is also configured to point to your appropriate MS Word documents folder. Contact your administrator for further information on such configurations. Please also refer to the document Web Based Mail Merge Features for more information on the Campus Café mail merge and communications system.

Web Based Mail Merge feature for documents and Email.

In addition to the normal Work Flow Mail Merge/Tracking feature, the People Finders support ad hoc mail merge functions by clicking the “Mail Merge-No Tracking” Button. The ad hoc mail merge will apply to all persons selected on the People Finder. This type of mail merge is not recommended since items done are not tracked in the tracking system. A separate permission exists for this option and it is recommended that it only be used for testing content etc. You can always use the “Add Tracking” feature in this people finder to batch in a group of tracking records and then use the Work Flow Mail Merge to print and track items as done.



The document to be merged will have an X in the check box and cannot be modified. You may however, select one additional document to print using the same data set. This would be useful if you needed to print a corresponding set of labels. Upon clicking the "Merge Link", the selected Word Document Template(s) will be invoked and merged document(s) will appear. The destination type will determine if the merge is an Email or Document. A header and footer image can be selected for an email.

Default header and footer image url are a hierarchy as follows:

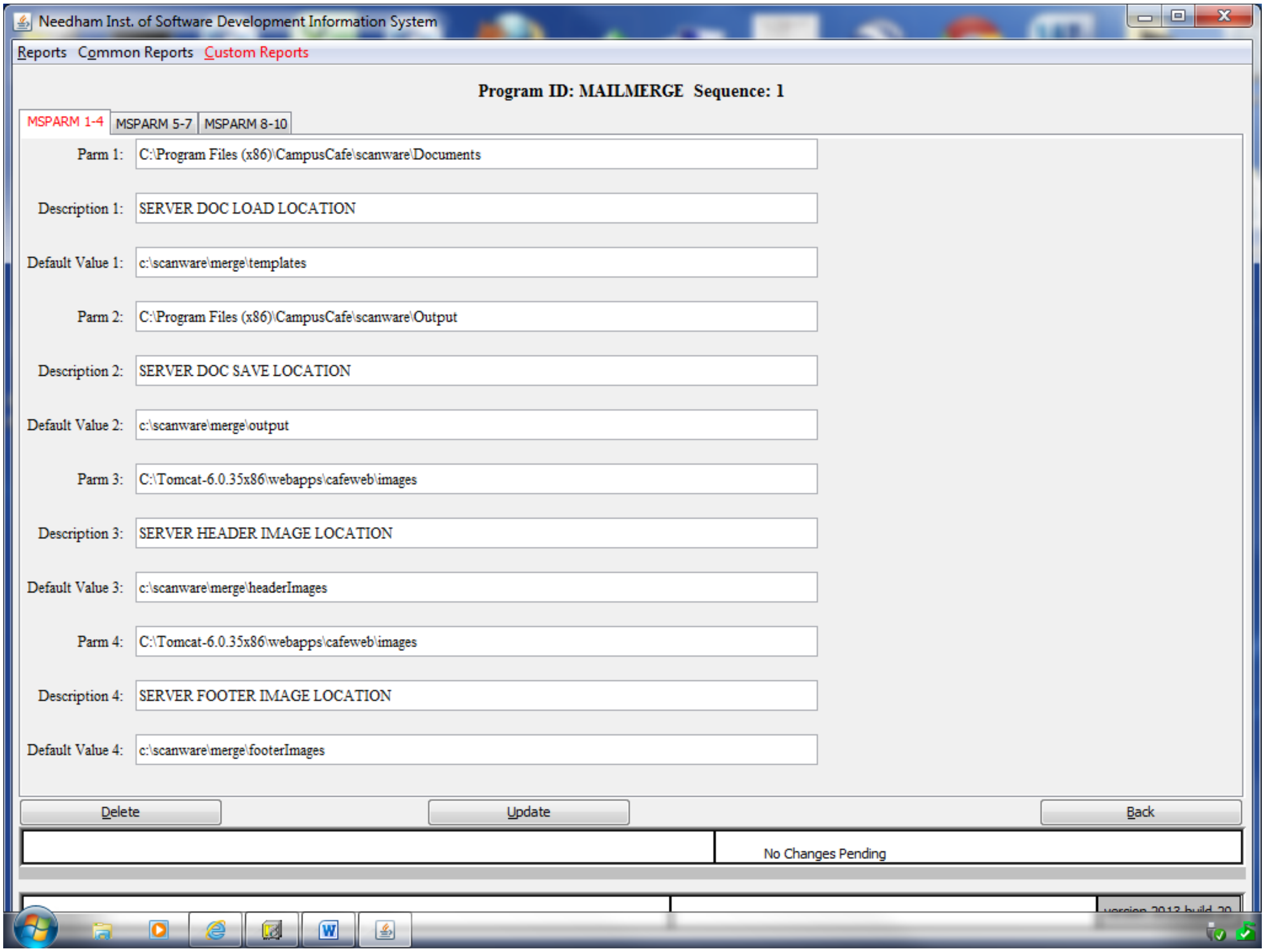
As entered on in the drop downs on the page.

ADPCOP header and footer images using USER ID (this will allow the individual user to have their own personalized header and footer.

ADPCOP using school default called SCHLEMDEF. This ADPCOP record should contain the institutional defaults for head and footer. This will appear on the email even if there is no personal default or when a header and footer is not explicitly defined in the drop downs.

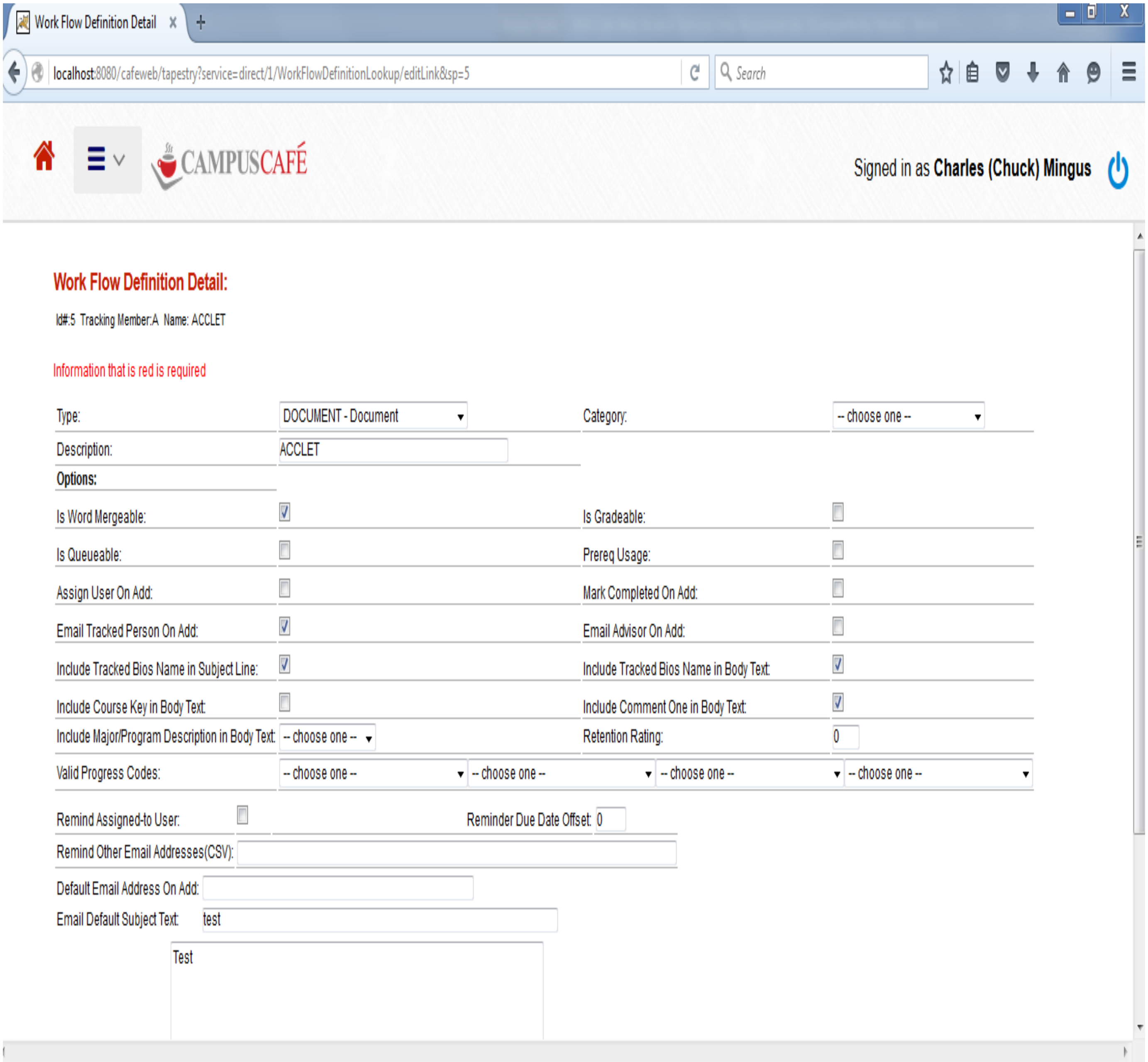
The following must be configured so that the merge function will execute properly.

MSPARM: MAILMERGE Seq 1, parms 1-4. Make sure the locations in 1-4 actually exist on the server.
Parm 1 is where the Word Templates are located. (Templates are .doc or .docx that have the same name as what is selected from the list).
Parm 2 is the destination of the merged docs (on the server)
Parm 3 is where the header images live. This folder must exist.
Parm 4 is where the footer images live. This folder must exist.



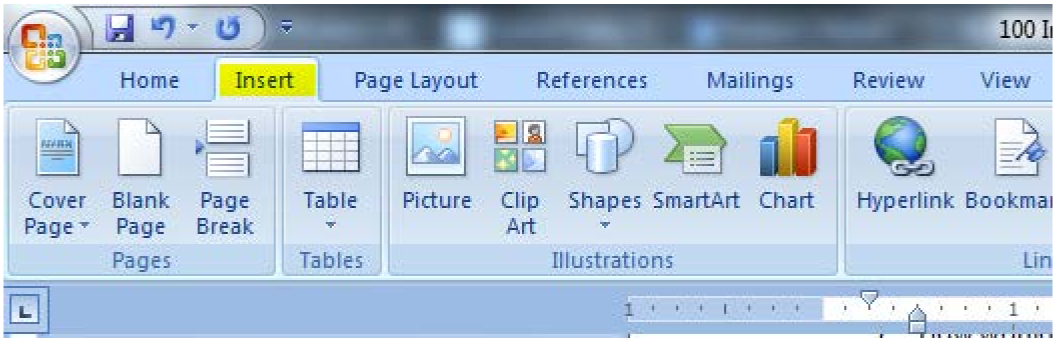
Setting up the Mail Merge Word Template:

To create a word document merge template, you first create a word document that is named the same as its corresponding work flow item. For example, if you have a stock acceptance letter that will be sent to all accepted applicants, then you would first set up a work flow item connected to an activity tracking template. Once the work flow item has been created, ensure that the work flow item properties are set to "Word Mergeable" as shown in the screen shot below.

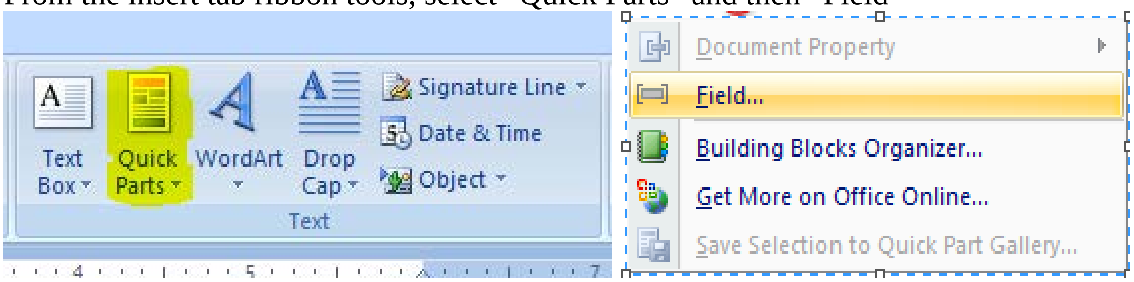


Once you have a word document saved with the same name as the work flow item, in this example the word document file would be named ACCLET.docx, you must then set up the word document to contain merge fields. The following screen shots will assist in helping you add acceptable merge fields into a word document.

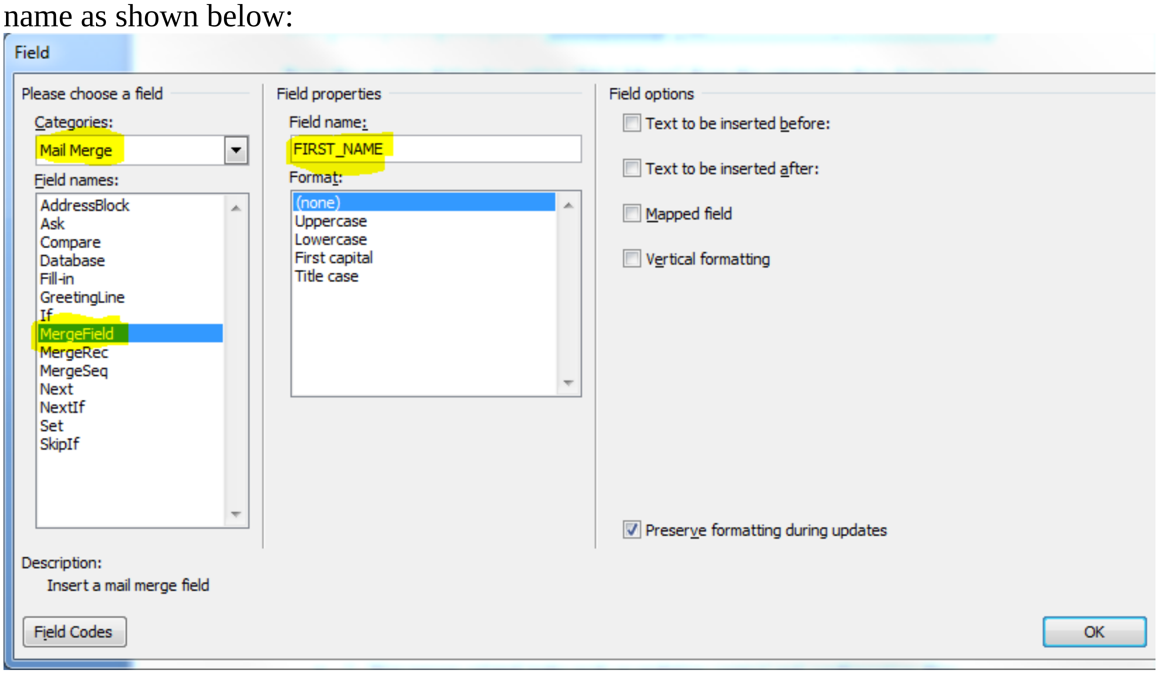
Open your word document and select the “insert” tab:



From the insert tab ribbon tools, select "Quick Parts" and then "Field"



From the ensuing dialog box select "Mail Merge" from the categories drop down menu and then "MergeField" from the list. In the Field Name text box type in your merge field name as shown below:



Click OK. Your new field name will show up within tags like this <FIRST_NAME> in the body of your word document. You can place this field wherever you would like the data to be merged in the body of your letter.

Once this is complete, you can copy the new template to the server according to where you set up your mail merge template folder in the instructions above. This work flow item will now show up in the activity tracking mail merge page and be linked to the corresponding word document on your server.

Please note that you can have an image in the word doc template if you are “Sending to New Document.” If you are sending an email, any image in the doc will not render correctly. This is what the “Header Image for Emails” and “Footer Image for Emails” is for.

Here are the allowable fields that can be used in a mail merge (Please note the underscore, not a blank space):

- Id_Number
- SSN
- Last_Name
- First_Name
- Middle_Name
- Nick_Name
- Suffix
- Maiden_Name
- Deceased
- Email
- Home_City
- Home_State
- Home_Country
- Home_Zip
- Gender
- Advisor_1
- Advisor_1_Name
- Advisor_2
- Advisor_2_Name
- Majors
- Department
- Birth_Date
- Class_Year
- Continuing_Ed_Code
- Inq_Date
- App_Date
- Resident_Code
- Adm_Ent_Sem
- Prog_Code
- Counselor
- Telemarketer
- High_School
- Admissions_Site

- Applied_For_Grade
- Current_Grade
- Transfer_Code
- Inq_Majors

If select salutation type:
- Formal_Code
- Formal_Sal
- Formal_Dear
- Informal_Code
- Informal_Sal
- Informal_Dear
- Alumni_Code
- Alumni_Sal_1
- Alumni_Sal_2
- Alumni_Dear
- Very_Informal_Code
- Very_Informal_Sal
- Very_Informal_Dear
- Custom_Code
- Custom_Sal
- Custom_Dear
- Formatted_Sal
- Formatted_Dear

If select address type:
- Address_1
- Address_2
- Address_3
- City
- State
- Zip
- Zip_Ext
- Country
- Province

When merging schools:
- Name
- Sort_Name
- CEEB
- Suffix
- Street1
- Street2

- Street3
- City
- State
- Zip
- Zip_Ext
- Country
- Province
- Phone
- First_Name
- Middle_Name
- Last_Name
- Title
- Email

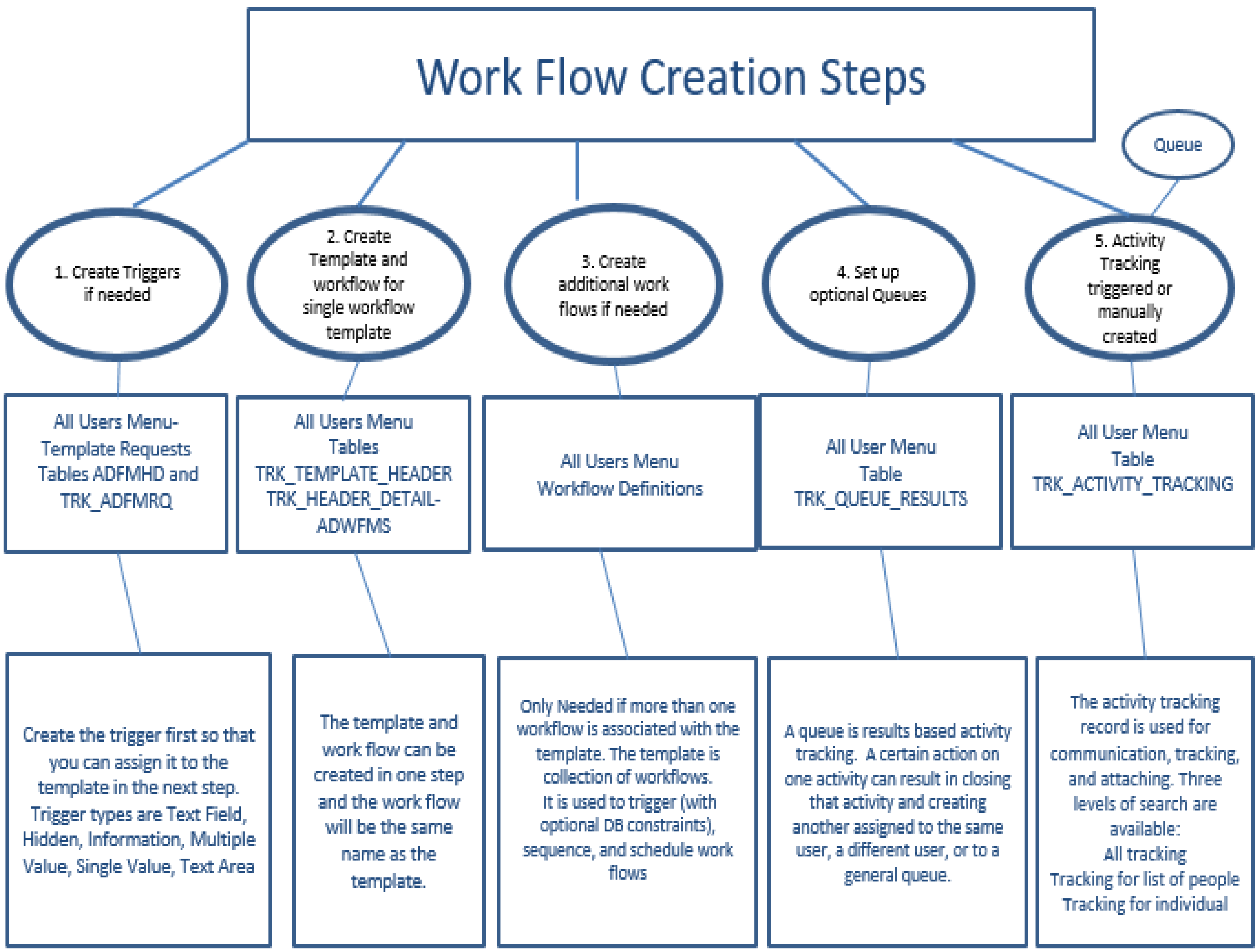
Campus Café Web Activity Tracking and Work Flow System

The activity tracking and work flow system is the cornerstone of the communications and work flow management solution within Campus Café Web. This system allows the user to create **workflows** that can contain automatic email notifications, comments, scheduled items such as interviews, and other events (letters, emails, texts, in a timed sequence).

The activity tracking system has many features and functions and is scalable and robust from a performance standpoint. Some of the highlights of the tracking system are as follows:

- Automatic email notification when a work flow is added. This email can be delivered to the subject person (student), the advisor, and/or a third party such as a campus department. For example, if an academic alert is placed on a student, the student, the advisor, and the academic department might all get notified by email of that event.
- Unlimited work flows can be associated with a template.
- Easy to use quick comment and customized email feature.
- Activity Tracking at the enrollment level.
- Queue system. This system will allow the user to "queue" a new activity tracking record from a result that is placed on an existing activity.
- Automatic email reminders from the work flow system to designated users inbox.

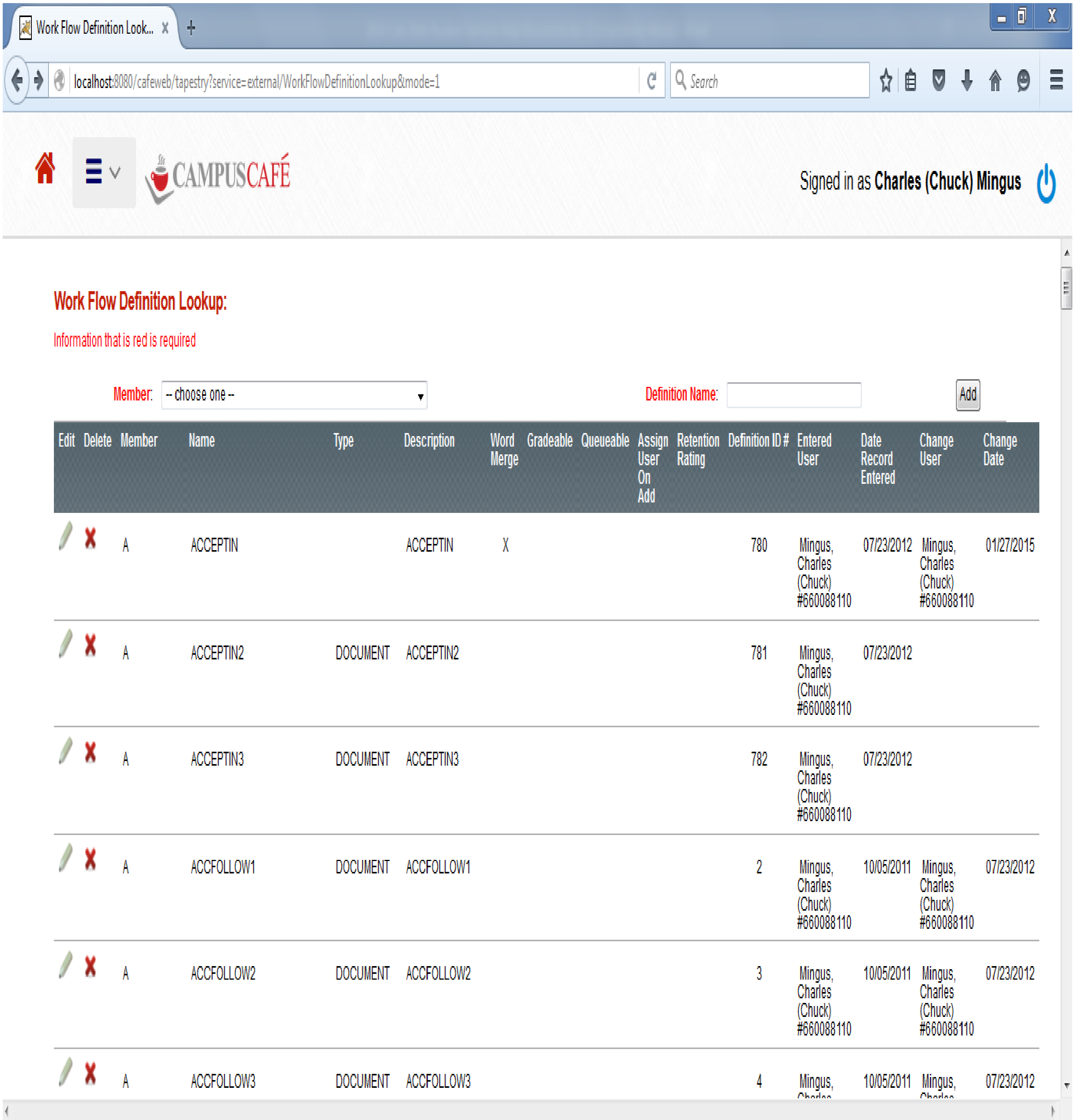
The following flowchart illustrates a high level overview of the new processes to create and deploy work flows. It is generally recommended that activity tracking needs and business process be mapped out prior to configuration. The configuration should generally be done with the steps being performed in the order specified in the flowchart.



Work Flow Definition Creation

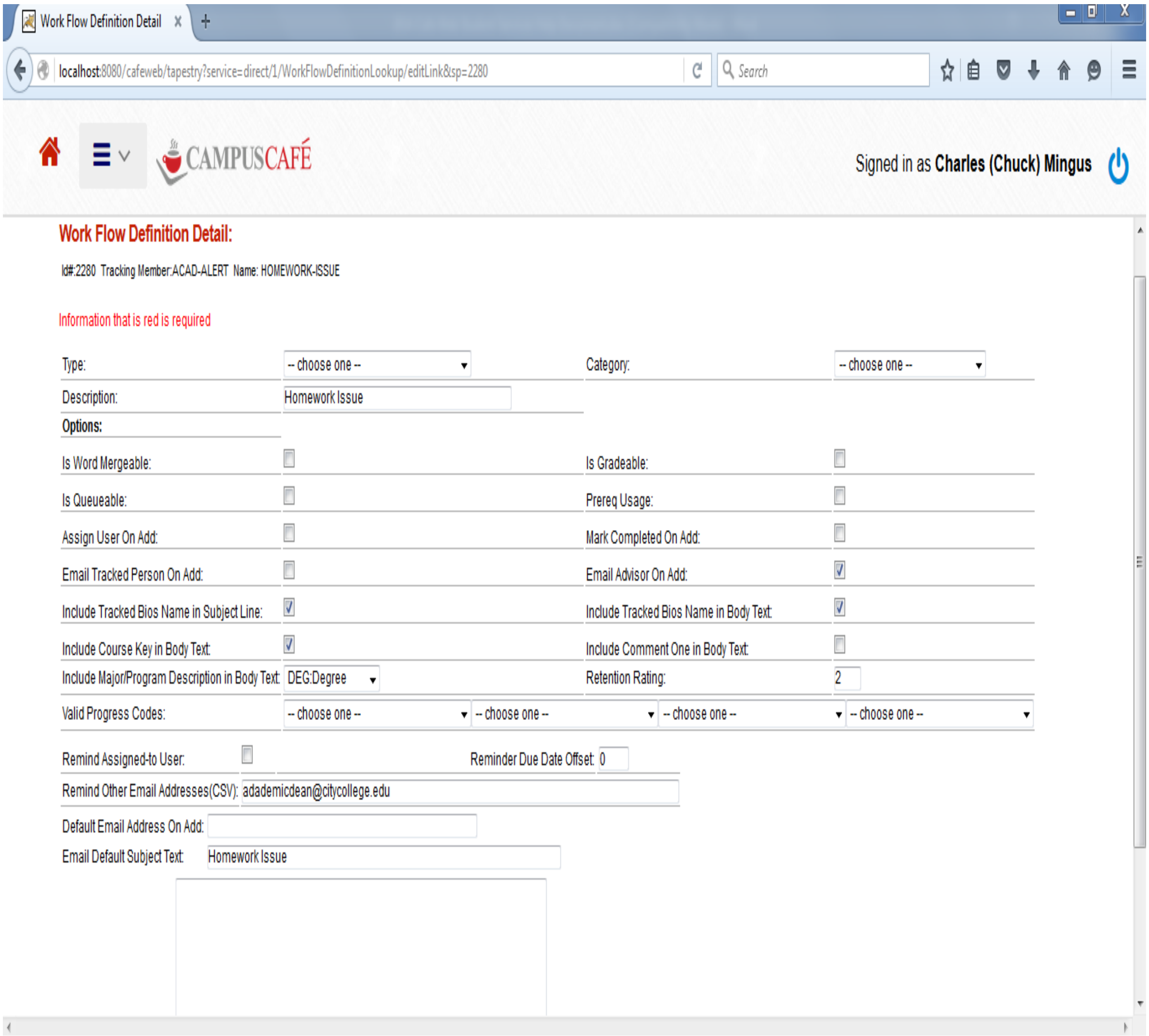
Please note that a work flow definition can automatically be created when a template is created. This is a big time saver in cases where there is only one work flow per template which is normally the case. Clicking the "Create from Template" button on the template set up will create a template and a work flow of the same name simultaneously. You can then edit the work flow directly from the template interface to add additional parameters or rules to the work flow.

Additional Work Flow definitions can be created from the All Users menu on Café Web.



Edit	Delete	Member	Name	Type	Description	Word Merge	Gradeable	Queueable	Assign User On Add	Retention Rating	Definition ID #	Entered User	Date Record Entered	Change User	Change Date
		A	ACCEPTIN		ACCEPTIN	X					780	Mingus, Charles (Chuck) #660088110	07/23/2012	Mingus, Charles (Chuck) #660088110	01/27/2015
		A	ACCEPTIN2	DOCUMENT	ACCEPTIN2						781	Mingus, Charles (Chuck) #660088110	07/23/2012		
		A	ACCEPTIN3	DOCUMENT	ACCEPTIN3						782	Mingus, Charles (Chuck) #660088110	07/23/2012		
		A	ACCFOLLOW1	DOCUMENT	ACCFOLLOW1						2	Mingus, Charles (Chuck) #660088110	10/05/2011	Mingus, Charles (Chuck) #660088110	07/23/2012
		A	ACCFOLLOW2	DOCUMENT	ACCFOLLOW2						3	Mingus, Charles (Chuck) #660088110	10/05/2011	Mingus, Charles (Chuck) #660088110	07/23/2012
		A	ACCFOLLOW3	DOCUMENT	ACCFOLLOW3						4	Mingus,	10/05/2011	Mingus,	07/23/2012

Before including a work flow item in a template, you must first define the work flow item in the work flow item master file ADWFMS. Work flows are contained in templates. A template can be thought of as a collection of work flows, triggering mechanism, and sequencing mechanism. Once a template is created, the information in the template can be used as a default in a tracking record added for an individual person. The tracking record may contain comments, scheduled items such as interviews, and also a timed sequence of work flow items. For example, a template could contain four sequenced work flow items (events) that are scheduled 1 week apart.



Campus Café Web supports many different configurable options for individualized work flows. The example above is for an academic alert and some of the options are as follows:

You may enter a type in the **Type Dropdown.** The type is an STPARM (SYWFTY) and must be described in the parameter file first. Some suggested types would be PHONE, EMAIL, WRITTEN, VISIT, EVENT although you can create additional types to further segment your work flow items for filtering on the work flow interface on the People Finders. This field is a searchable filter on the activity tracking lookup page.

You must enter a **Description** for each work flow item to be used.
The category is also an STPARM (AFREAD) and is used to segment and filter work flows. It is recommended that you set up categories to avoid having to specify many individual work flows when searching. Some suggested examples might be SOURCES, SPORTS, INTEREST, JUDICIAL, ACTIVITIES. A special category is recognized as missing documents. This value is specified in MSPARM APPSTATCAT 1-1 and contains the category value of work flows that will appear on the applicant status portal, and also used to determine if all missing documents are received in the application complete process. This field is a searchable filter on the activity tracking lookup page.

The **Is Word Mergeable** check box will allow you to specify which work flow items will appear in the Café Web merge drop down for creating letters and emails. This merge function appears on both the people finders and the work flow management pages.

The **Is Gradeable** check box will allow you to specify which work flow items can accept a unit grade. Since gradeable units are actually a special type of work flow, this flag will constrain the list of available work flows that can be used for this purpose.

The **Is Queueable** check box will allow you to specify which work flow items will appear in the next queue item drop down list when creating a new queue activity on the tracking interface. This feature essentially allows you to set a next activity based on a specific result entered into an activity tracking record. For example, you phone someone and they are not home. The queue is set up to schedule a recall in two weeks.

The **Prereq Usage** check box will allow you to specify which work flow items will appear as potential course pre-requisites. An example: a student must meet with an advisor before starting a class. That meeting could be set up as a pre-requisite and the completion date in the work flow would indicate a met condition.

The A**ssign User On Add** is checked. The Assign User on Add check box allows you to specify that a user will automatically be specified for this work flow item when it is added to a record. This will result in the work flow automatically being assigned to the person specified in the template. In this example, the work flow might be assigned to the person who is in charge of scheduling the required meeting so that it is in their “queue” for review.
For another example, you might set up a work flow item called FOOTBALL to keep track of all prospects that specified in interest in that sport. You would check this box so

that the football coach would automatically be assigned to the work flow either through the admissions portal or manual entry. The automatic assignment feature will only work if the work flow item is not already pre-assigned to a user. The automatic assignment will default to the user who is entering the record unless it is overridden. In this example, if the football coach were entering a prospect through the admissions portal, then the FOOTBALL work flow would be assigned to him. If an operations person were adding the record on behalf of the football coach, they would override and assign the FOOTBALL work flow to the football coach rather than themselves.

The **Mark Completed On Add c**heck box will allow you to specify that a work flow should be marked completed as soon as it is added. This is useful for one time reminder where the user might get a reminder email, but no further action is required on the work flow.

The E**mail Tracked Person On Add** is checked. This will result in the subject of the work flow (in this case a student) automatically being sent an email upon the addition of the alert. This can be used for many different applications and notifications.

The E**mail Advisor On Add** is checked. This will result in the advisor automatically receiving and email upon the addition of the work flow (e.g. academic alert).

The I**nclude Bios Person Name In Subject Line** is checked. This will add the person's name in the subject line of the automatic email.

The I**nclude Bios Person Name In Body Text** is checked. This will add the person's name to the body of the automatic email.

The I**nclude Course Key In Body Text** is checked. This will add the semester, course, and section in the body of the automatic email.

The I**nclude Comment One In Body Text** is checked. This will add the ad hoc comment added at run time to the body of the email allowing the user to customize the message sent.

The I**nclude Major Description In Body Text drop down is used.Reten** This will add the description of the program/major to the body of the email allowing the user to customize the message sent. If using this feature, you must specify which major you wish to display (inquiry, applicant, accept, or degree).

Retention Rating is used. This field is used to add weighting to the retention rating. The numerical value will be added to the student retention rating which can be searched on the student finder.

Valid Progress Codes: This will constrain the sending/printing of work flows if the admissions progress code is not one specified in this section. For example, you set up a series of letters and emails to go to the inquiry pool to get them to apply. Half way through the series, the prospect applies. The remaining inquiry flows will be ignored since they are no longer relevant to that process.

The **Remind Assigned-to User** is checked. This will automatically send an email to the assigned to person on the reminder date specified. See further instructions on reminder due date for details.

The **Remind Other Email Addresses (CSV) is filled in.** This will automatically send an email to all emails specified on the list on the reminder date specified. See further instructions on reminder due date for details.

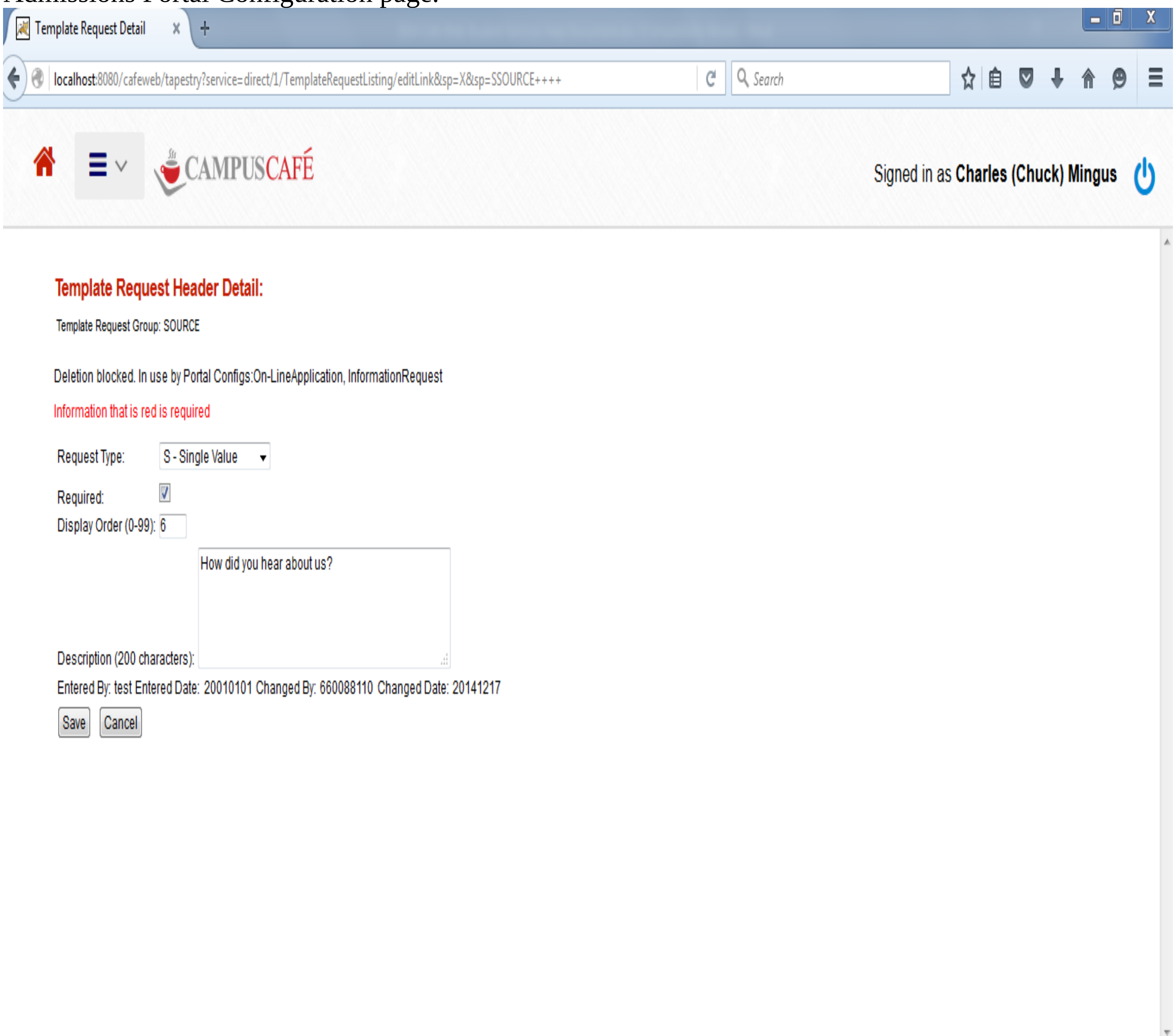
The **Reminder Due Date Offset is specified.** This will set the reminder date to be this number of days before the due date in the activity tracking record. The user can edit the activity tracking record at any time and change the reminder date. Once the email is sent, the sent flag will be checked on the work flow. The user can also uncheck the flag and change the reminder date so that they get another reminder in the future.

The D**efault Email Address On Add** is checked. This will send a copy of the email to the address specified. In this case, it would go to the academic dean's office. Many other users can be configured for this feature. For example, the admissions office might want to receive an email every time an application is received and work flows are triggered, or the soccer coach might get an email every time a soccer prospect inquires.

The E**mail Default Subject Text** is filled in. This text will be included in the subject line of the email(s) sent.

Creating admissions portal trigger headers for activity tracking.

The creation of trigger headers can be accessed from the All User Menu or the Admissions Portal Configuration page.



The Template Request Header must be created first and is essentially a grouping mechanism for triggers.

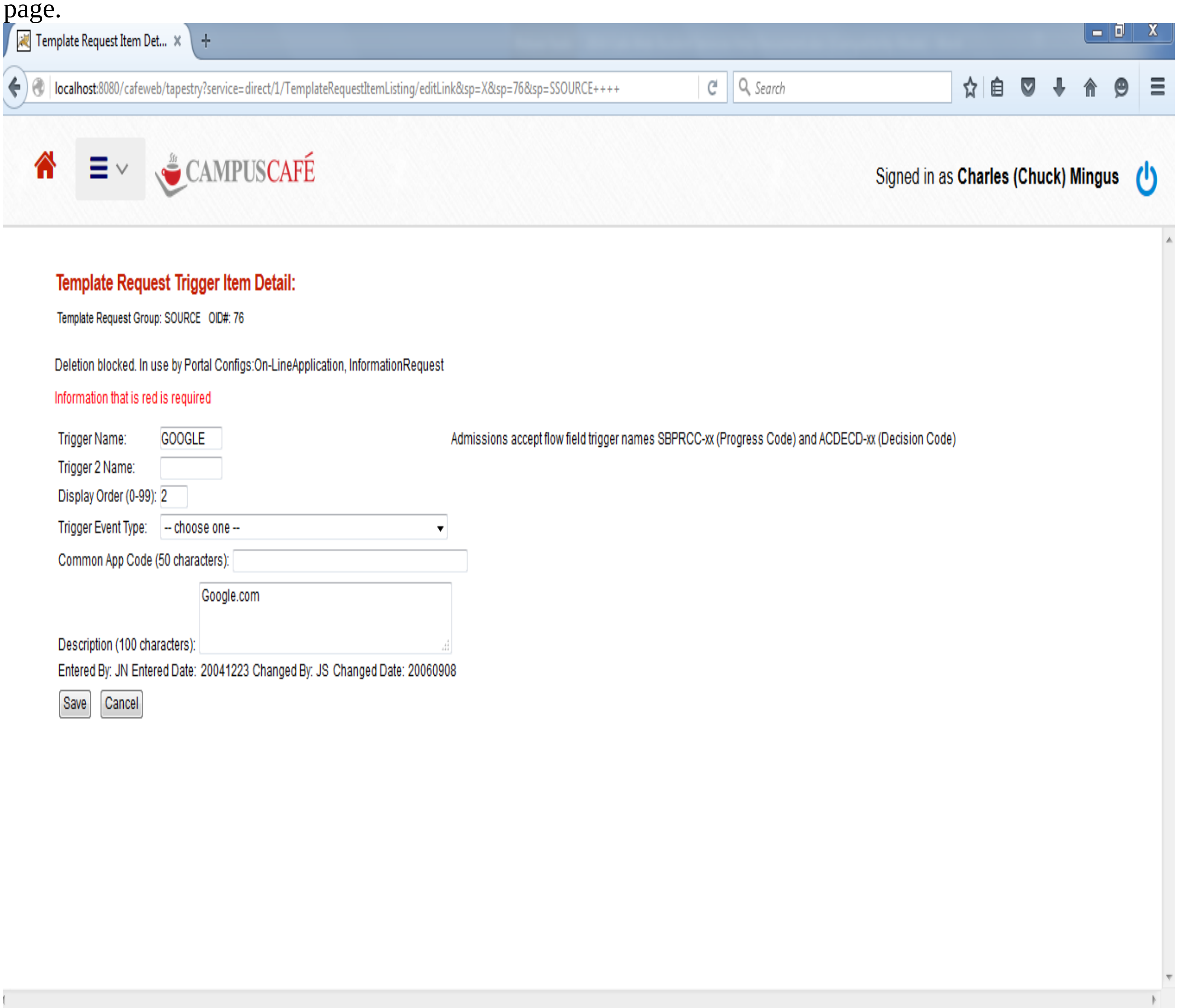
Request Type: This field is used to specify the trigger type. For example, a trigger on the admissions portal might be hidden, allow multiple selections, drop down list etc.

Required: This flag if checked will require the user to pick at least one triggered item on the user interface.

Display Order: This will allow you to order the triggered items as you choose. For example, you might have a list of activities to be chosen on the portal page and they need to be in a particular order other than the order they were entered into the configuration.

Creating admissions portal trigger detail for activity tracking.

The creation of trigger detail can be accessed from the All User Menu or the Admissions Portal Configuration
page.



The Template Request Triggers are the actual event triggers. When an event occurs, the system will search the activity templates to see if there is a trigger for that event. If a matching trigger is found, then the template is used to create work flows associated with the template.

Trigger name: This name must match the trigger name any associated templates.

Trigger 2 Name: This name must also match trigger names on any associated templates.

Display order: Allows the user to control the display order on the user interface.

Trigger event type: Specifies the context for the triggered event. Examples ENR_TRK_RELEASE would be used to trigger work flows based on an enrollment specific event. There are also other types such as admissions portal events and database events (change of progress code triggers a work flow).

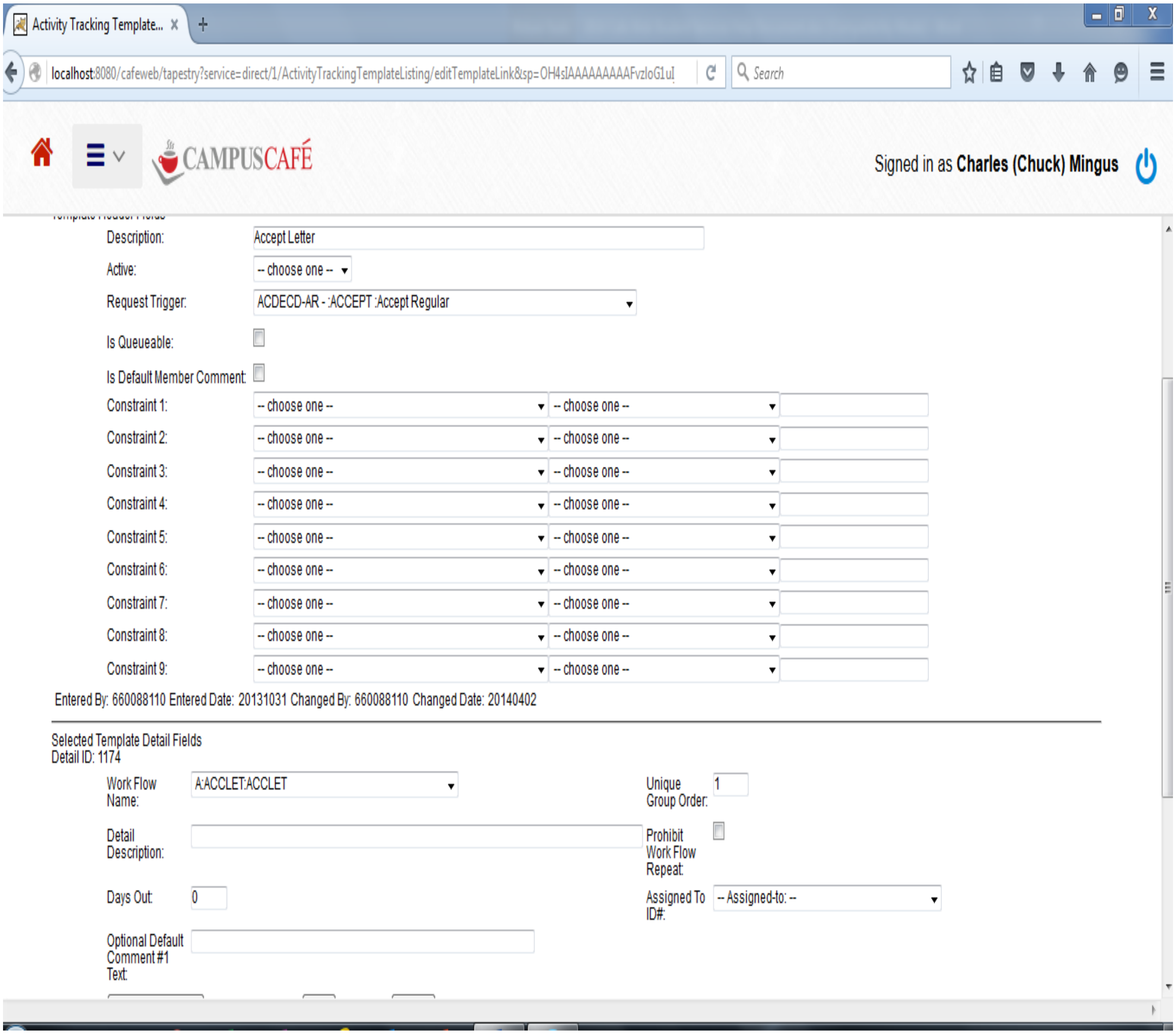
Common App Code: This code allows specification of a trigger based on the actual common input value.

The Admissions accept flow trigger are special triggers for database events. For example if a trigger name is SBPRCC-A, then changing the progress code to an A will activatge this trigger.

There are also other types of triggers such as such as admissions portal events. These are specified in the admissions portal configuration and the matching name is specified here for the trigger.

Creating activity tracking template header.

The creation of activity tracking template headers and detail can be accessed from the All User Menu.



Active: Inactive templates will not show in drop down lists and therefore can no longer be added to a person's record.

Request Trigger: This drop down is derived from the triggers built in the previous steps. Events will search the templates for this value and create work flows if a match is found.

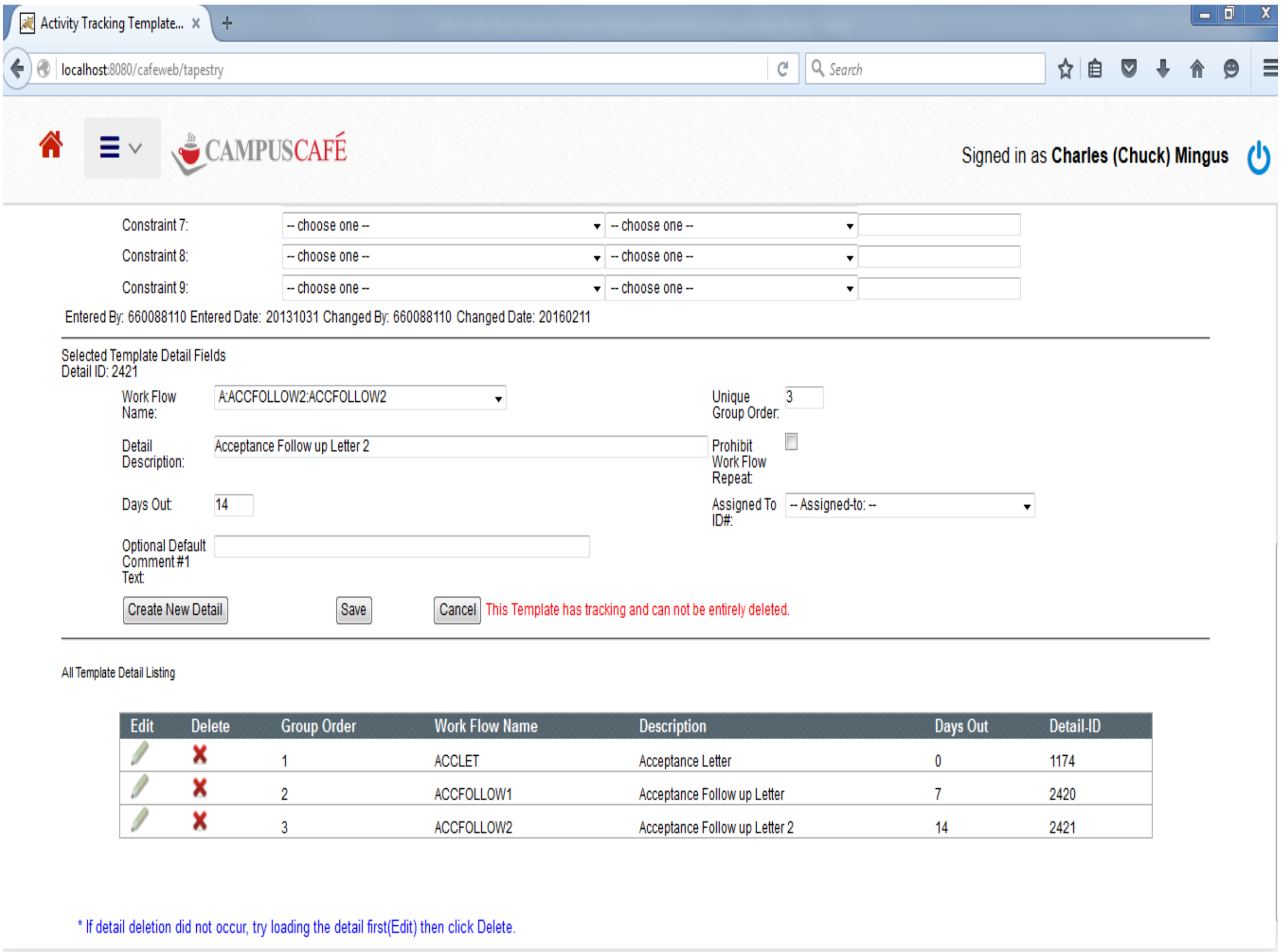
Is Queueable: DEPRECATED- Now specified in the work flow definition.

Is Default Member Comment: This is used for the quick comment feature. Multiple templates can be specified.

Constraints: The constraints are used to limit a trigger based on values in the database. For example, an event might attempt to trigger a work flow, but only if the person is in a particular program.

Creating activity tracking template detail.

The creation of activity tracking template headers and detail can be accessed from the All User Menu.



Edit	Delete	Group Order	Work Flow Name	Description	Days Out	Detail-ID
		1	ACCLET	Acceptance Letter	0	1174
		2	ACCFOLLOW1	Acceptance Follow up Letter	7	2420
		3	ACCFOLLOW2	Acceptance Follow up Letter 2	14	2421

This interface is used to add work flows to the template.

Days Out: This will automatically set the date for the scheduled item based on the number of days specified.

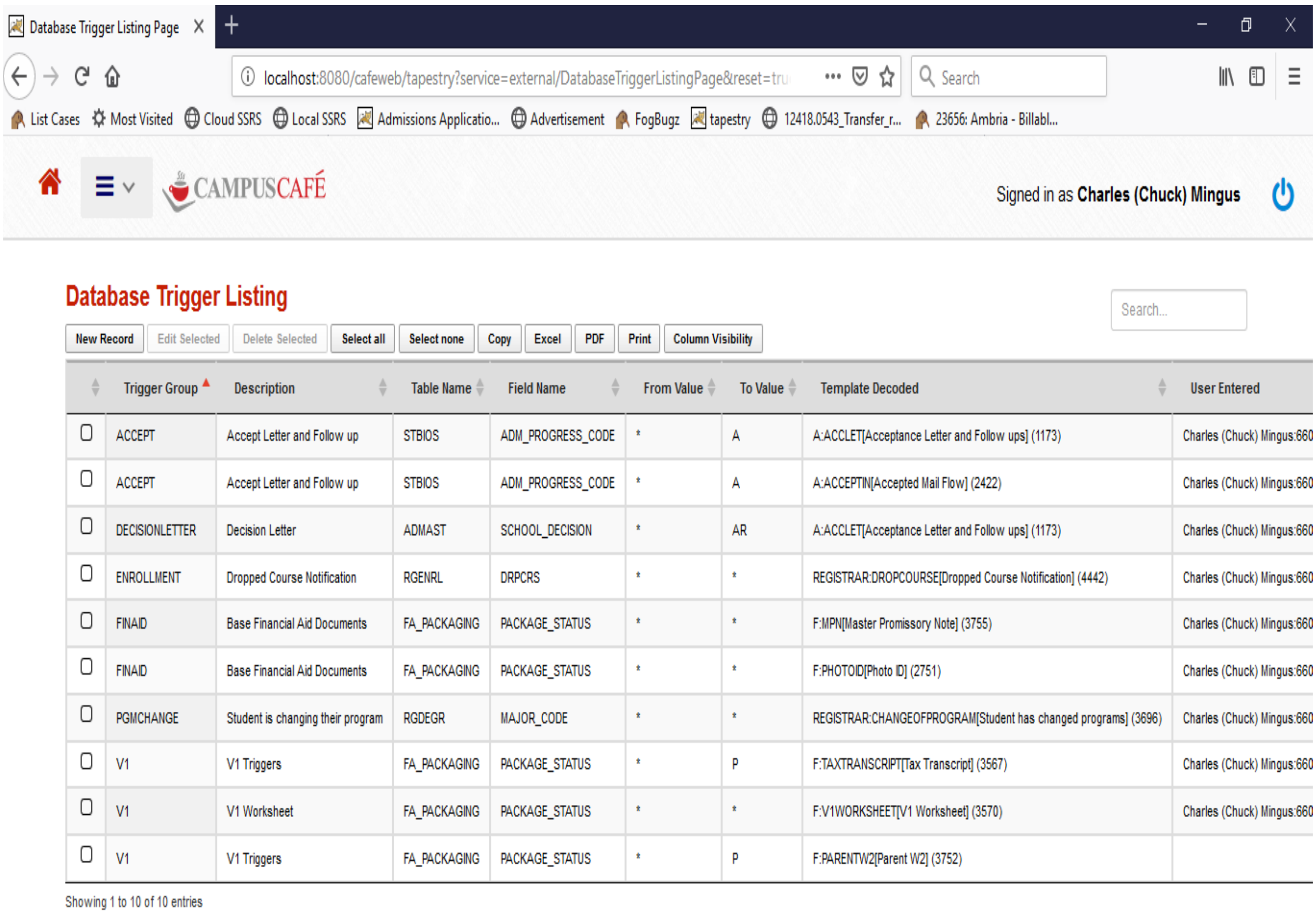
Optional Default Comment #1 Text: The text placed here will automatically be placed in the comment one for the work flow created.

Unique Group Order: This will govern the order of the work flows added to a group.

Prohibit Work Flow Repeat: The work flow will not be created more than once for the person.

Assigned to ID: The work flow is automatically assigned to this person and will show up in their personal work flow list as a default.

Creating database triggers for activity tracking.



	Trigger Group	Description	Table Name	Field Name	From Value	To Value	Template Decoded	User Entered
☐	ACCEPT	Accept Letter and Follow up	STBIOS	ADM_PROGRESS_CODE	*	A	A:ACCLET[Acceptance Letter and Follow ups] (1173)	Charles (Chuck) Mingus:660
☐	ACCEPT	Accept Letter and Follow up	STBIOS	ADM_PROGRESS_CODE	*	A	A:ACCEPTIN[Accepted Mail Flow] (2422)	Charles (Chuck) Mingus:660
☐	DECISIONLETTER	Decision Letter	ADMAST	SCHOOL_DECISION	*	AR	A:ACCLET[Acceptance Letter and Follow ups] (1173)	Charles (Chuck) Mingus:660
☐	ENROLLMENT	Dropped Course Notification	RGENRL	DRPCRS	*	*	REGISTRAR:DROPCOURSE[Dropped Course Notification] (4442)	Charles (Chuck) Mingus:660
☐	FINAID	Base Financial Aid Documents	FA_PACKAGING	PACKAGE_STATUS	*	*	F:MPN[Master Promissory Note] (3755)	Charles (Chuck) Mingus:660
☐	FINAID	Base Financial Aid Documents	FA_PACKAGING	PACKAGE_STATUS	*	*	F:PHOTOID[Photo ID] (2751)	Charles (Chuck) Mingus:660
☐	PGMCHANGE	Student is changing their program	RGDEGR	MAJOR_CODE	*	*	REGISTRAR:CHANGEOFPROGRAM[Student has changed programs] (3696)	Charles (Chuck) Mingus:660
☐	V1	V1 Triggers	FA_PACKAGING	PACKAGE_STATUS	*	P	F:TAXTRANSCRIPT[Tax Transcript] (3567)	Charles (Chuck) Mingus:660
☐	V1	V1 Worksheet	FA_PACKAGING	PACKAGE_STATUS	*	*	F:V1WORKSHEET[V1 Worksheet] (3570)	Charles (Chuck) Mingus:660
☐	V1	V1 Triggers	FA_PACKAGING	PACKAGE_STATUS	*	P	F:PARENTW2[Parent W2] (3752)	

Activity Tracking Templates can be used for creating workflows, sending out emails, storing and tracking documents, creating reminders, etc..

Campus Café allows for triggering of activity tracking templates based on changes made in the database. This is invoked through the audit log function (when the audit log detects a change, it triggers a tracking template based on triggers you set up in this interface).

Here is a quick summary of how you would use this feature.

Step 1-Set up an activity tracking template (e.g. GraduationNotice).
Step 2-Set up a trigger through this interface that will create an activity tracking template whenever the student status is changed to Y (graduated).

The audit log functions as a history of changes made to a person's record. Generally, the audit log records changes to existing records (e.g. the student status is changed from E-Enrolled to Y-Graduated). However, there are other exceptions and events that also will create a record in the audit log. These include:

Adding an enrollment
Dropping an enrollment
When adding an FA_PACKAGING record, Status, Verification Status, Verification Code and C Code will be audit logged
Logging into Café Web

Below is a sample of some triggers that have been set up to create activity tracking templates. Some are events such as ADDCRS,DRPCRS. Others are transactional such as a student graduating from a program.

You can create multiple triggers that will create the same templates. In the example below, a V1 packaging status triggers two templates, while a V2 status triggers three templates.

Please remember that a template can be configured so that it is only created once or once per semester, regardless of how many times it is triggered.

Here is a brief description of the fields in the trigger table.

TRIGGER_GROUP: Your own grouping mechanism to keep several triggers together on the list (e.g. V1).

DESCRIPTION: Your description of the trigger.

TABLE_NAME: The name of the table in the database that contains the field being audit logged.

FIELD_NAME: The name of the field ***(or event***) used to create the trigger.

FROM_VALUE: You can specify a value or a wild card (*). As an example, you could specify that you want to trigger a template if the RGDEGR.STUDENT_STATUS literally goes from' E' to 'W', or you could specify that you want to trigger a template if the RGDEGR.STUDENT_STATUS goes from anything to 'W'.

TO_VALUE: this will contain the result that will be in the audit log. For event driven triggers. You would generally specify an * in the from and the to values (e.g. ADDCRS).

TRIGGER_GROUP	DESCRIPTION	TABLE_FIELD_NAME	FROM	TO	TEMPLATE_
V1	V1 Documents	FA_PACKAGING.VERIFICATION_TRACKING_FLAG	*	V1	P1040
V1	V1 Documents	FA_PACKAGING.VERIFICATION_TRACKING_FLAG	*	V1	BANKSTATE
V2	V2 Documents	FA_PACKAGING.VERIFICATION_TRACKING_FLAG	*	V2	P1040
V2	V2 Documents	FA_PACKAGING.VERIFICATION_TRACKING_FLAG	*	V2	BANKSTATE
V2	V2 Documents	FA_PACKAGING.VERIFICATION_TRACKING_FLAG	*	V2	SUPPORTST
WITHDRNOTICE	Stud. Withdraw	RGDEGR.DEGREE_STATUS	E	W	WITHNOTIC
GRADNOTICE	Stud. Graduates	RGDEGR.DEGREE_STATUS	*	Y	GRADNOTI
ADDENROLL	Enroll add	ADDCRS	*	*	ADDCOURS
DROPENROLL	EnrollDrop	DRPCRS	*	*	DRPCOURS
FINALGRDCHG	Grade change	RGENRL.FINAL_GRADE	*	A	GRADECON
FINALGRDCHG	Grade change	RGENRL.FINAL_GRADE	*	F	GRADEFAIL
LEAVEABSENCE	Student LOA	RGSTAT.STATUS_CODE	*	LA	LEAVENOTI
DEPOSITFLOW	Prospct Deposit	STBIOS.ADM_PROGRESS_CODE	*	P	DEPOSITFL
REGACCFLOW	Prospct Accept	ADMAST.SCHOOL_DECISION	*	AR	REGACCEPT
INTACCFLOW	Internat accept	ADMAST.SCHOOL_DECISION	*	AI	INTACCEPT

Constraints on Database Triggers

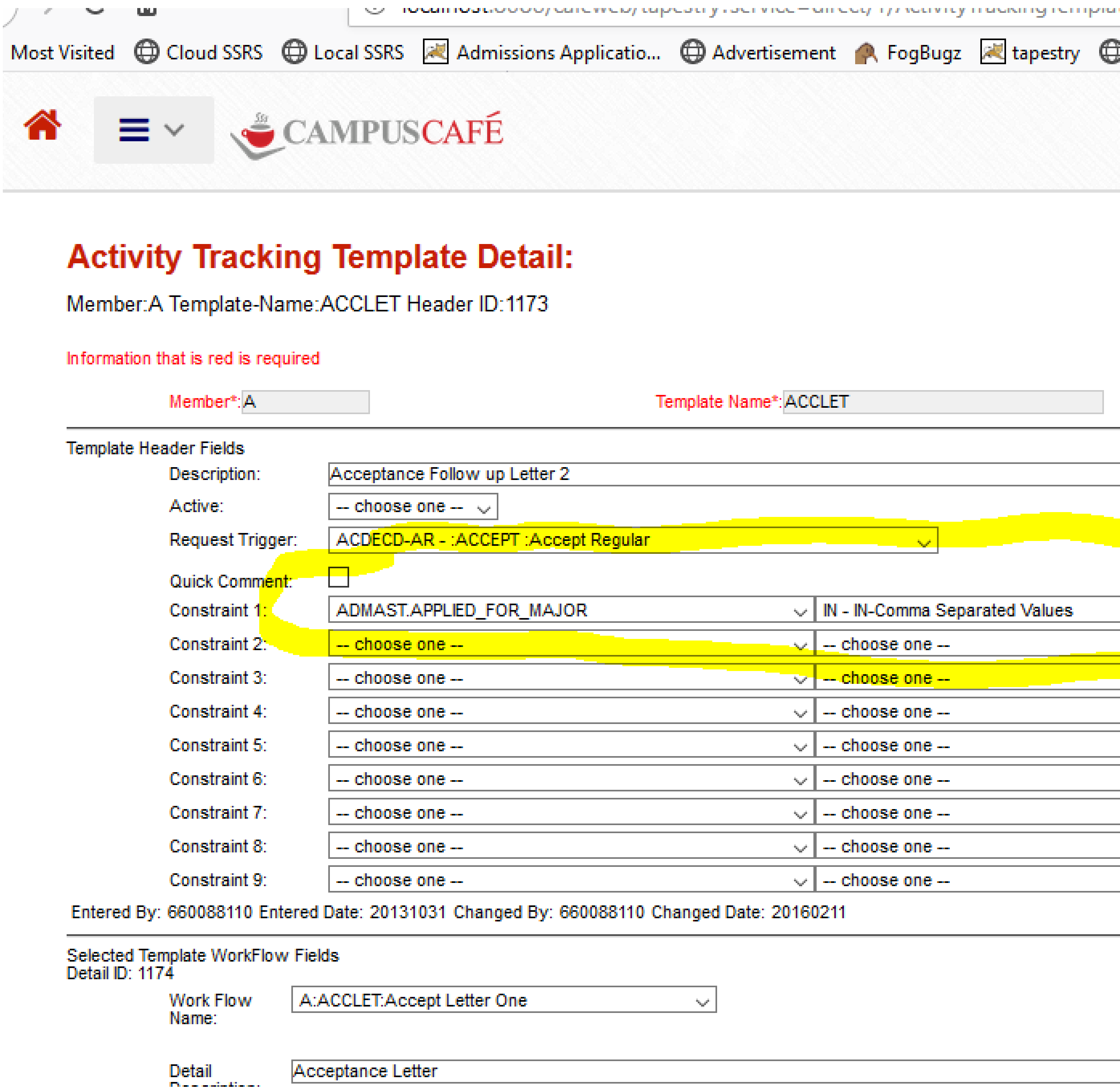
Please note that activity tracking templates can be constrained by values in the database. For example, you may only want an activity triggered if a prospect is in a certain major. On the activity tracking template, you can add a constraint (see sample page below) on the major codes. Only the following fields are currently available for use in the constraints.

STBIOS Fields:
("SEX");
("TRANSFER_CODE")
("ADMISSIONS_ENT_SEM")
("ADM_PROGRESS_CODE")
("BIRTH_DATE")
("ADMISSIONS_RES_CODE")
("ADMISSIONS_SITE")
("INTL_STUDENT_CODE")
("CONTINUING_ED_CODE")
("US_CITIZENSHIP")

("ADMISSIONS_INQ_MAJOR")
("RETURN_MAIL_CODE")
("PRIMARY_LANGUAGE_CD")
("FIN_AID_CODE")

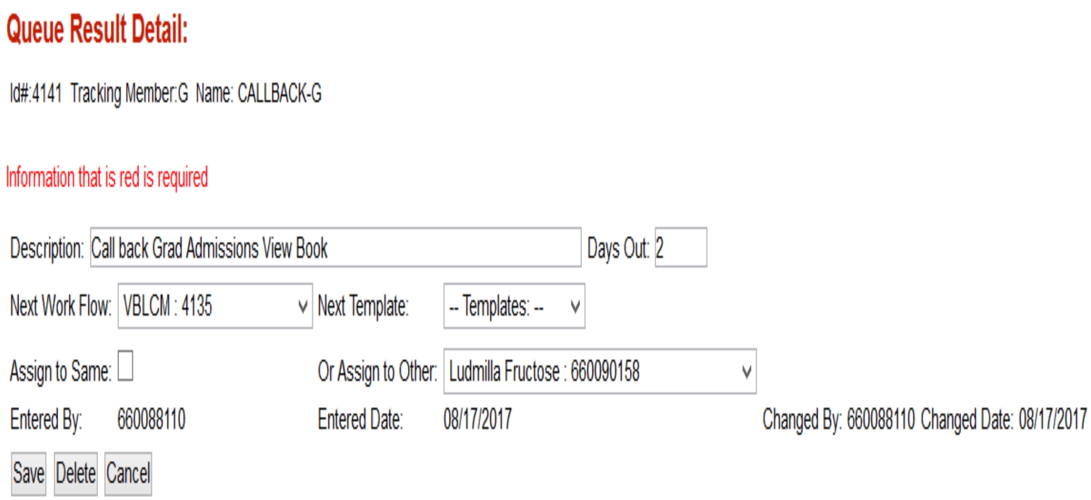
ADMAST Fields:
("ACTION_TYPE")
("FIRST_GEN_CODE")
("APPLIED_FOR_MAJOR")
("APP_SOURCE")
("ACCEPT_MAJOR")
("APPLICATION_TYPE")

ADINQS Fields:
("SOURCE_NUMBER")
("INQUIRY_PROGRAM")
("FORM_USED_FOR_ENTRY")
("INTEREST_CODE_1")



Creating queue results.

Queue results can be used to create a true work flow system where an action or event can trigger another work flow or assign the work flow to another person in the work flow chain. The creation of queue results can be accessed from the All User Menu.



This interface is used to add queue results. A queue result can create a new work flow within a template group, or it can create a whole new template group.

Days Out: This will automatically set the date for the next work flow item to be queued. A value of 0 means that the next item will be scheduled for today. For example, you may call a prospect and they are not home. You set up a queue result called CALLBACK for 1 week. The current work flow is marked completed and a new CALLBACK work flow is schedule 1 week out.
Next Work Flow: The next work flow to be created as a result of this queue action.

Next Template: The next templated group of work flow(s) to be created as a result of this queue action.

Assign to Same: The next work flow is assigned to the same person as the current work flow in the queue.

Assign to Other: The next work flow is assigned to the person specified for the next work flow in the queue.

Activity Tracking Queue Result Listing

Member: -- choose one -- **Result Name:** Add

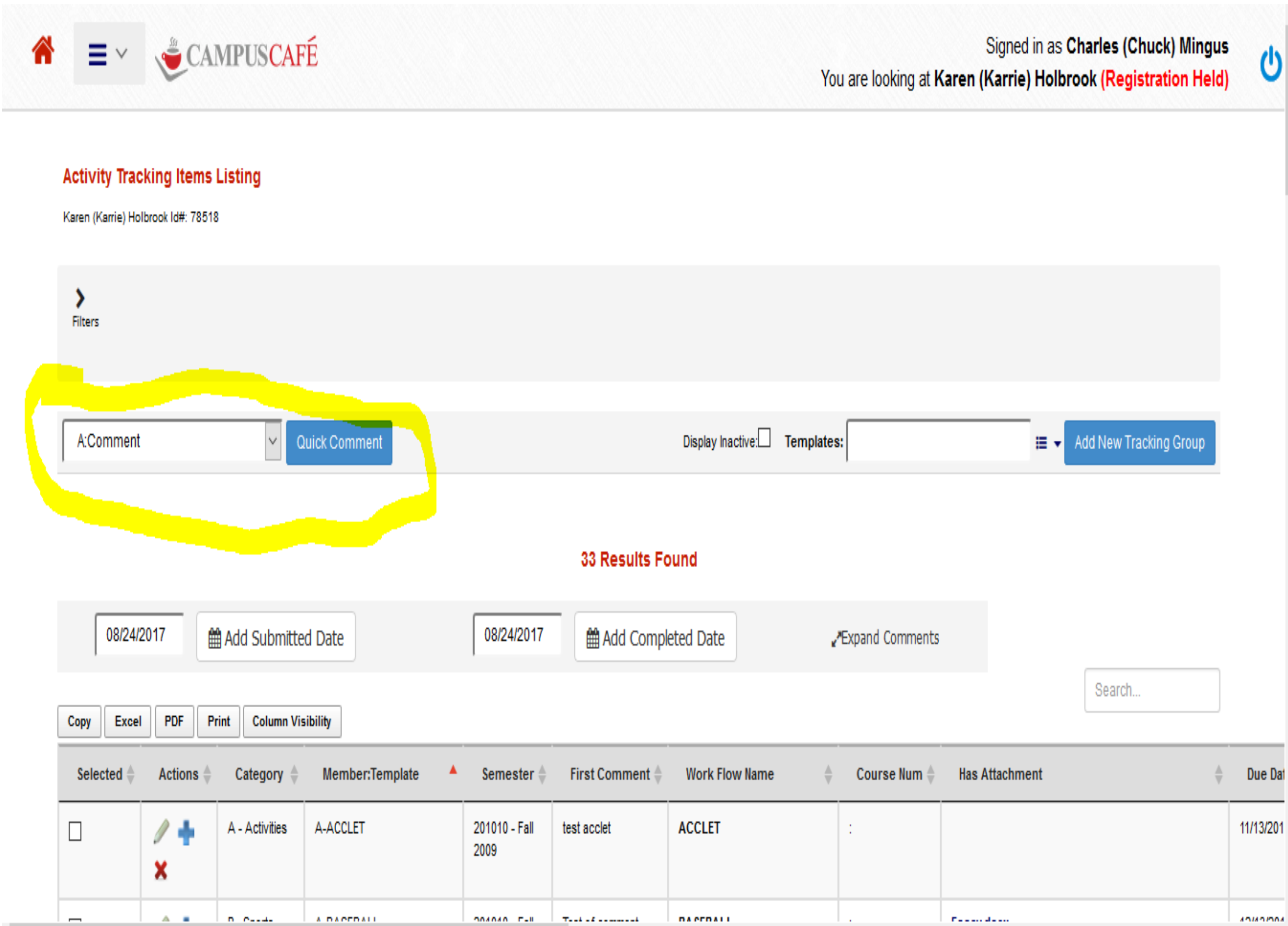
Search: Search...

Copy | Excel | PDF | Print | Column Visibility

Edit	Delete	Member	Name	Description	Next Work Flow	Next Template	Days Out	Next User On Add	Queue Result ID #	E
		ENROLL	CALLBACK	Call Back	CALLBACK (1155)		0	0	1157	Min #66
		ENROLL	ALERT	Alert	ALERTS (978)		0	0	1158	Min #66
		M	CALLBACKALUMNI	Call Back in 7 Days	CALLBACKALUMNI (1248)		7	0	1249	Min #66
		A	CALLBACK	Call back	PHONE (33)		1	0	2759	Min #66
		G	CALLBACK-G	Call back Grad Admissions View Book	VBLCM (4135)		2	660089133	4141	Min #66

Showing 1 to 5 of 5 entries

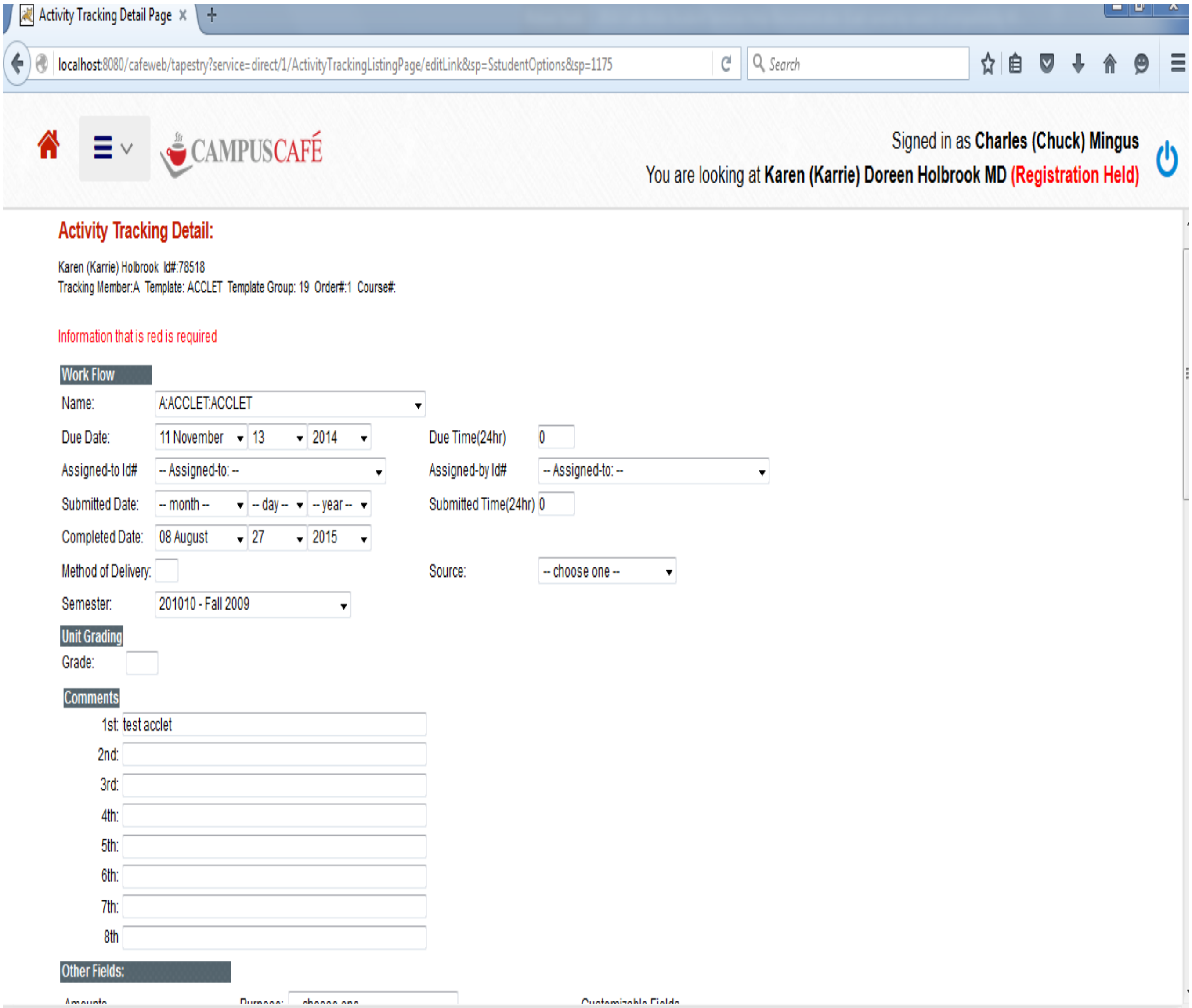
Quick Comment Feature



The default member comment check box in the template allows the user to designate a tracking item to be available for the QUICK COMMENT feature within activity tracking. This feature allows the user to add a comment directly from the tracking grid without having to look up a template. The **default member comment checkbox** on the activity tracking template will cause an item to appear in this drop down list.

Activity Tracking Sample

The following image shows an example of an actual tracking work flow record for a person. The work flow items can be viewed, manipulated, and added through the work flow interface found on the people finders throughout Campus Café Web or direct access to the activity tracking system can be found on the main red bar menu under All Users.



Activity Tracking Detail-top half of page definitions:

The due date and completed dates are used for default filtering in the activity tracking listings. For example, in general, completed items will not appear in an initial search of activity tracking. This is to prevent view large numbers of items that have been "closed". You can view completed items by changing the <= to >= on the completed date filter.

In the 'All User" activity tracking, items that are due in the future will also not appear by default. This feature is designed to prevent seeing calls, to do items, etc. that are in the future. You can view future items by changing the <= to >= on the due date filter.

Due Date: This field is generally used to be the due date or request date for the event and is also used for the email reminder days offset. For example, you set up a meeting for 09/25/2014. The email reminder offset is 2 days. You will automatically receive an email on 09/23/2014 to remind you of the meeting. See details below on email reminder usage.

Submitted Date/Time: These fields are used to track the submission of missing documents or gradeable units. It would also be used for confirmation of an appointment. For example, a meeting is requested on 09/25/2014. The person is then scheduled for the meeting on 09/30/2014. This date would be entered into the submitted date.

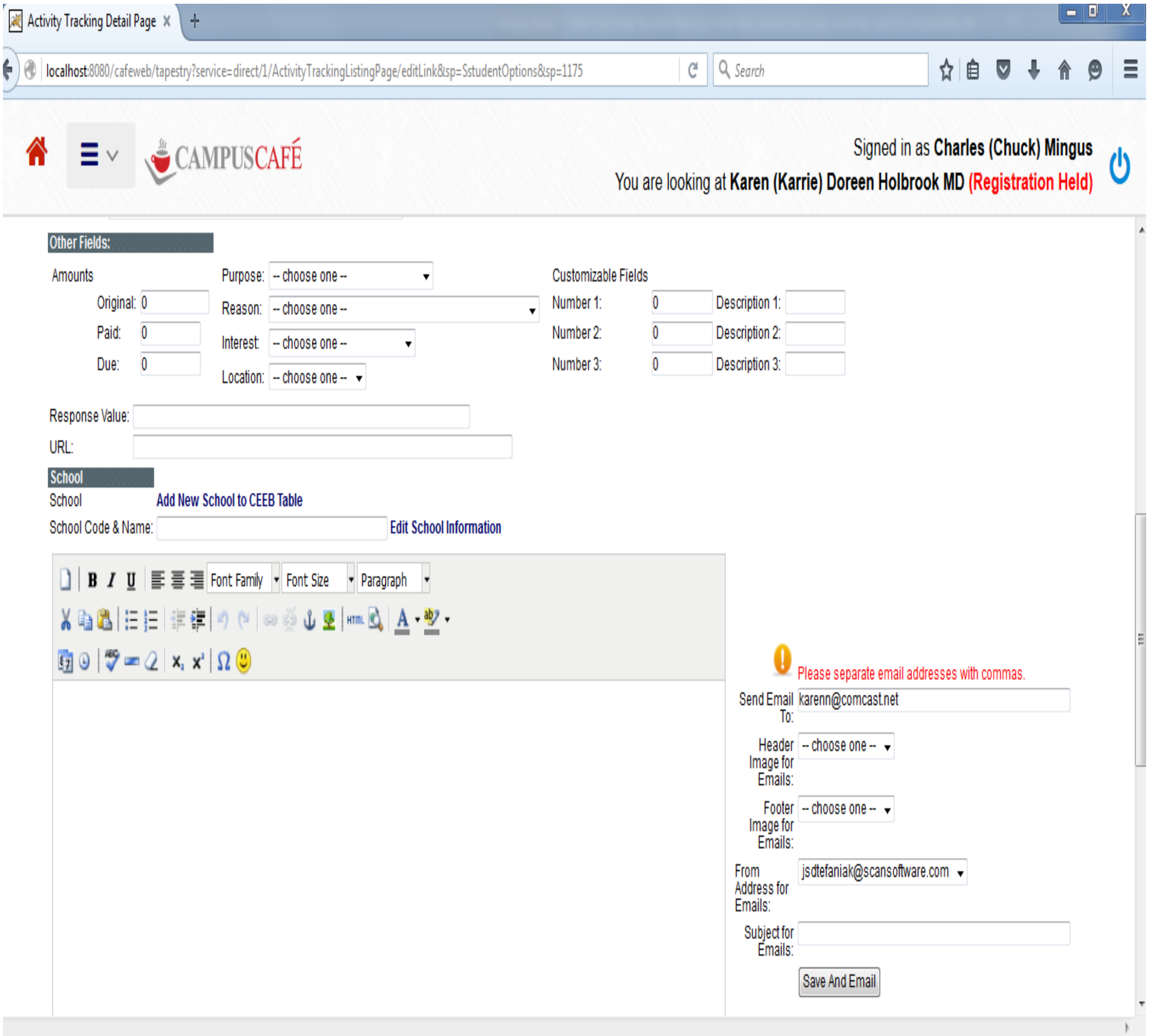
Completed Date: This field is used to indicate that at tracking item is closed. Many types of tracking items should not marked as closed. These would include commnets, missing documents, gradeable units. Bulk items or appointments should be marked as completed to reduce the number of open tracking items. For example, you batch 1000 emails to a group of students and send out the email through the mail merge interface. The mail merge process will mark these items as complete since they are essentially closed for further activity.

Semester: This field is used for tracking items where a term or semester would be relevant. This would include admissions tracking items and the entering semester of the prospect is automatically entered into this field.

Unit Grade: This field is used to store the value of a unit grade and is used only within the context of course based tracking for gradeable units.

Comments: These fields are used for short comments. In the context of the admission applicant status portal, the first comment is displayed in the comment section of the missing documents section. There is a function in the tracking detail setup that will default the contents of the first comment in the template into each work flow created by that template. (see Optional Default Comment #1 Text).

Activity Tracking Detail-bottom half of page definitions:



Amount Fields: For example, you might use the original amount to track how much it costs to attend an event. The pledge reminder system uses these field to track the amount of the original pledge, the amount currently paid, and the remaining amount due.

Customizable Fields: These fields can be used generically to track money fields or other text associated with a tracking record. They are not searchable and the attribute fields (purpose, reason, etc. should be used to code records for future search and/or sorting.

Purpose: This field is a searchable attribute of a tracking record. (STPARM-ADPURP). You might set up parameter values to designate the purpose for a visit or event.

Reason: This field is a searchable attribute of a tracking record. (STPARM-ADREAS). You might set up parameter values to designate the reason for a visit or event.

Interest: This field is a searchable attribute of a tracking record. (STPARM-ADINTR). You might set up parameter values to designate the interest level for a visit or event.

Location: This field is a searchable attribute of a tracking record. (STPARM-ADLOCA). You might set up parameter values to designate the location for a visit or event.

Response Value: This field will contain the response value from a web form question. For example, on the forms menu, there is a form that asks a person if they wish to participate in an event. The value of yes/no would be stored in this field for that question.

URL: This field is used to store a URL associated with the tracking record.

School Code and Name: This field is used to track the CEEB number or name of a school in a missing transcript tracking record.

Large Comment Section: This area will store a large amount of text either manually entered or pasted from another source.

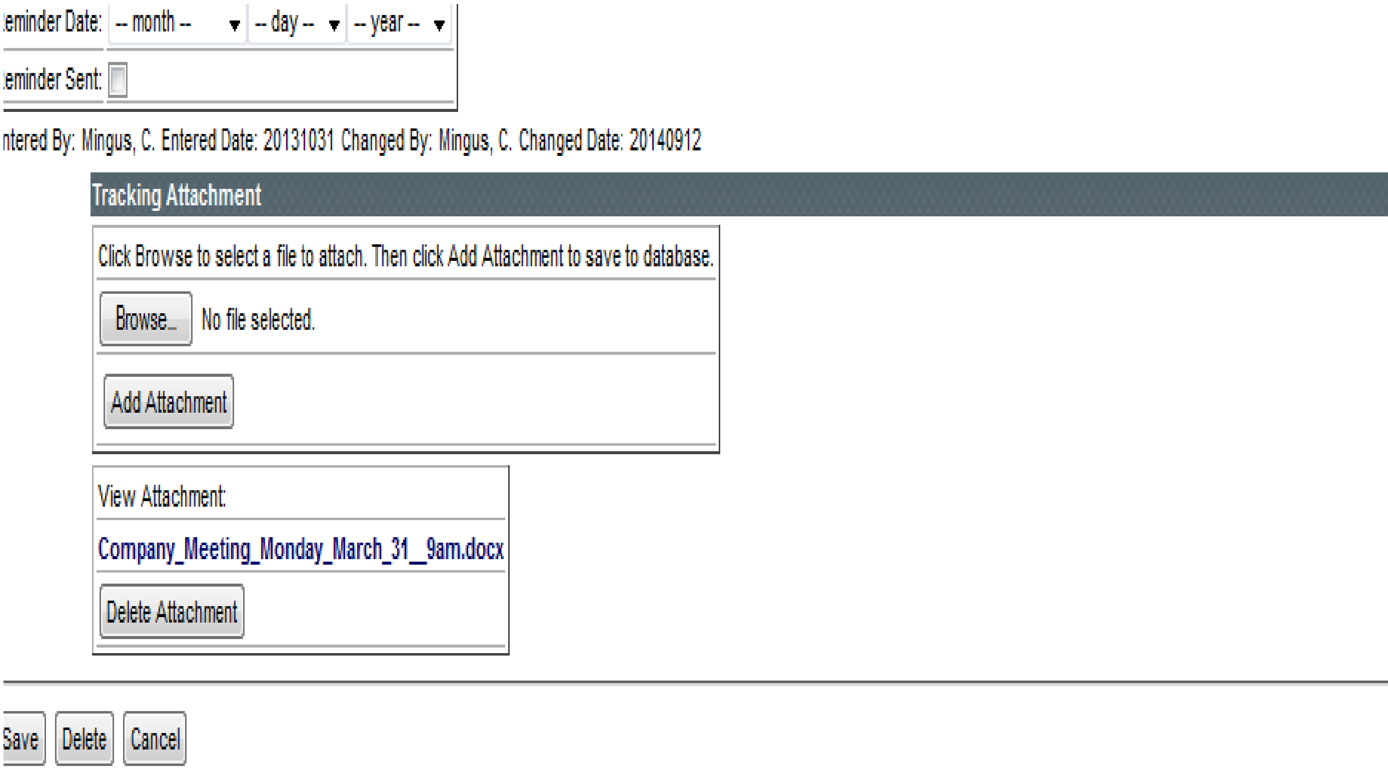
Send Email To: This section will allow you to send an email to the specified address(s) and also will include the text in the large text area. This allows you to “save” the contents of the email for future reference. The header and footer images can be defaulted for the school in the systems menu (SCHLEMDEF). Each user can also have their own customizable header and footer set up and designated in the system menu. See system administrator to set up these defaults.

Reminder Date: This date is used for the automatic email reminder feature. If the workflow is set up as a reminder (either the assigned to box is checked or additional email addresses are specified), then this date will automatically be set to the same date as the due date. This date can be changed at any time.

Reminder Sent: This field will automatically get checked when the email reminder is sent. You can uncheck the box and reset the reminder date to get a new reminder at any time.

See Appendix A for technical instructions on setting up a job scheduler to automatically have emails sent to your inbox at specified intervals.

NOTE: this reminder job can also be fired manually at any time from the Cafeweb Administration->Jobs Management menu once it is configured.



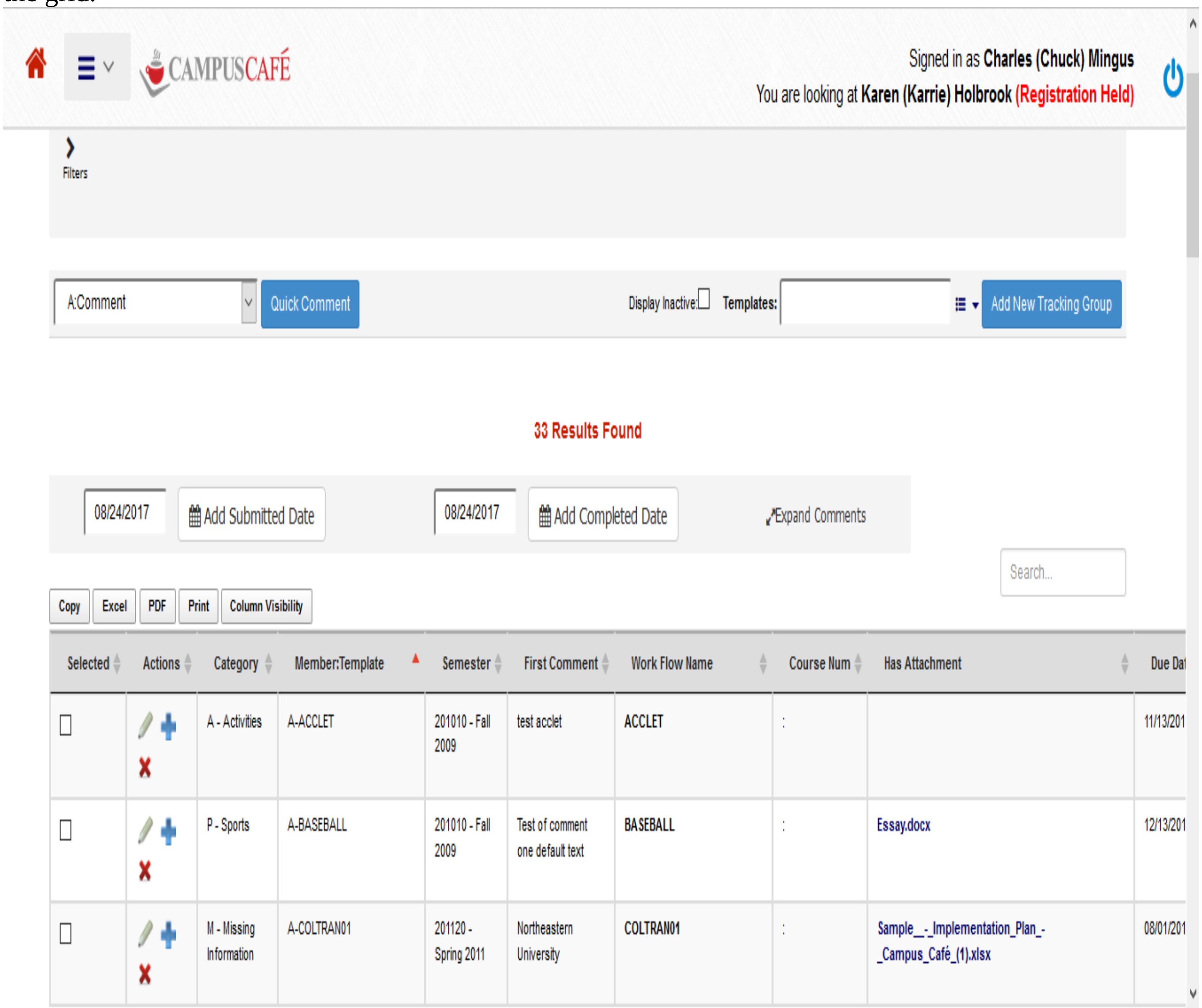
Activity Tracking Detail-Tracking Attachment Feature:

This feature will allow you to attach any document to a tracking record. Use the browse button to find the needed document and click Add Attachment to save.

View Attachment: These documents can be later retrieved by clicking on the saved document name in the view attachment section.

Delete Attachment: These documents can be deleted from the tracking record. Deletion of the document does not remove the tracking record itself.

The activity tracking list below shows additional information to assist in completing the action or event. Home phone, mobile phone, address, and email are provided as part of the grid.



The Edit Tracking Icon allows you to add comments or additional work flows and other information to an existing tracking record, or delete the tracking record. This may be useful if you wish to override the default dates or settings created from a tracking template. For example, a template is created and schedules a phone call for May 10 and May 17. You do not reach the person until May 16 and you want to reschedule the subsequent call for May 24. You can click the Edit Tracking Icon next to the work flow item and change the dates as well as any other information in the tracking record.

The launch person button will allow full access to the person record based on your permission group.

You may wish to filter or sort the work flow items. Use the filter boxes at the top of the page to filter tracking items. The blue links above each column will allow you to sort the list by that column value. This sorting and filtering might be used to get scheduled phone calls together for a particular task. Use the save default button to save your filter for repeated use.

Use the select and deselect buttons to select groups of work flows for batch updating. You can also select and deselect work flow items manually one at a time.
You may also wish to mark a group of work flow items as done so they will no longer appear as open work flow items. Clicking the mark work flows done button will update the done flag for all work flows selected in the grid. You will receive a warning message that must be answered to complete the operation. Conversely, you can mark a batch of work flow items as undone. This can be particularly useful if you need to reprint or merge a group of work flow items. The mail merge function will automatically mark selected work flow items as done.

You can also add a work flow item to a set of existing tracking records. For example you invite 1000 prospects to an open house. 100 people respond and they are coded with a scheduled date within the tracking record. You now filter on the remaining 900 tracking records that have do not have a scheduled date and you wish to add a new work flow item called invite2 to each of the 900 records. This function will allow you to batch add these work flow items. One and only one work flow list can appear on the grid for this function to work. An error message will appear if this is not the case.

Individual Tracking Items can also be added through this interface. Use the Add Tracking (Batch) button to select the tracking item that you wish to add for the person.

Activity Tracking Filters

This page below shows the filters available for activity tracking. The fields highlighted in yellow are those which can be saved with the Save Default check box and include:
Folder/Member
Semester
Date completed

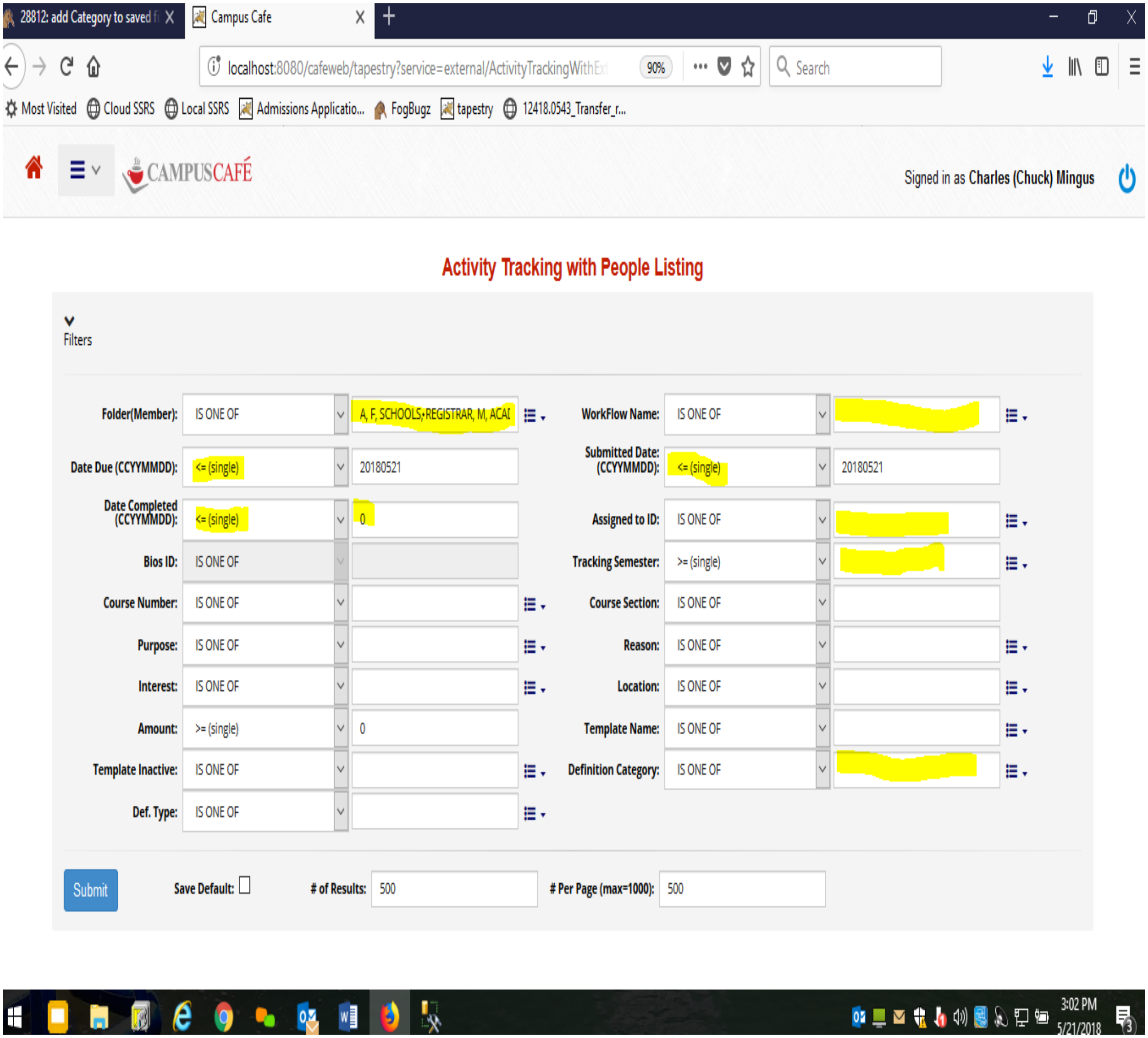
Date completed operator
Workflow Name
Assigned to id
Submitted date operator
Due date operator
Category

Saving filters has many uses for different scenarios. For example, setting the completed date operator to <= 0 means that you will not see completed items in the list. If you are using the list as a "to do" for today, you generally would not want to see completed items. You can easily switch the operator and refresh the page without saving the default to see completed items.

The category filter would be used to isolate certain groups of items such as "to do list", missing documents, events, etc.

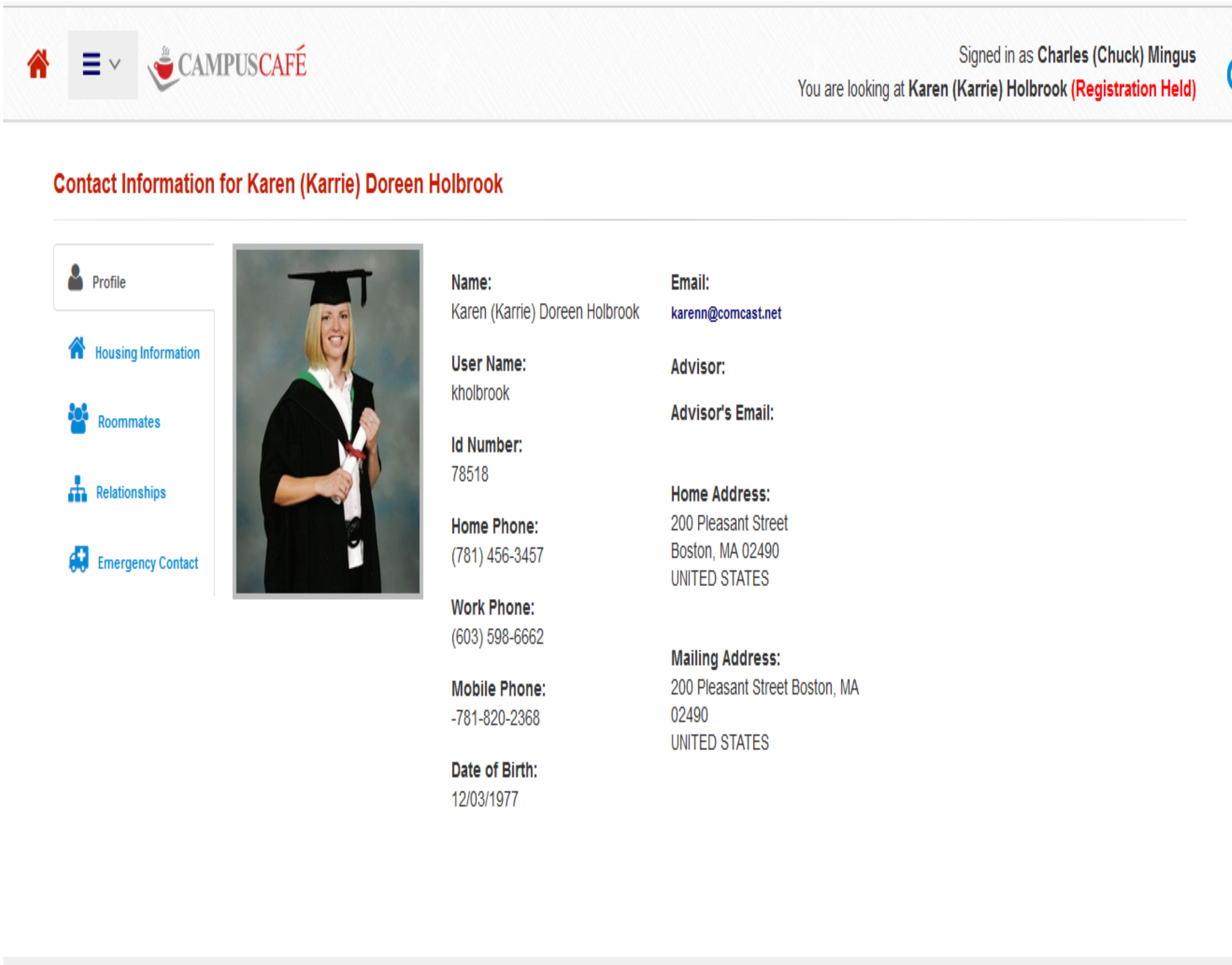
The assigned to id filter has its own permission. This permission can be set so that the user can only see activity tracking items assigned to them. If the user has authority to change this filter, then they can also save with the Save Default button.

Other filters such as due date and submitted date cannot be saved as defaults and will default to the current date.


28812: add Category to saved
Campus Cafe
localhost:8080/cafeweb/tapestry?service=external/ActivityTrackingWithEx
90%
Search
Most Visited
Cloud SSRS
Local SSRS
Admissions Applicatio...
FogBugz
tapestry
12418.0543_Transfer_r...
CAMPUSCAFÉ
Signed in as Charles (Chuck) Mingus
Activity Tracking with People Listing
Filters
Folder(Member): IS ONE OF
A, F, SCHOOLS, REGISTRAR, M, ACAI
WorkFlow Name: IS ONE OF
Date Due (CCYYMMDD): <= (single) 20180521
Submitted Date: (CCYYMMDD): <= (single) 20180521
Date Completed (CCYYMMDD): <= (single) 0
Assigned to ID: IS ONE OF
Bios ID: IS ONE OF
Tracking Semester: >= (single)
Course Number: IS ONE OF
Course Section: IS ONE OF
Purpose: IS ONE OF
Reason: IS ONE OF
Interest: IS ONE OF
Location: IS ONE OF
Amount: >= (single) 0
Template Name: IS ONE OF
Template Inactive: IS ONE OF
Definition Category: IS ONE OF
Def. Type: IS ONE OF
Submit
Save Default:
# of Results: 500
Per Page (max=1000): 500
3:02 PM
5/21/2018

Contact Information Panel

This panel contains basic information about a person in the database. There are various sections for which access can be controlled using permissions as described below.



The Contact Information Panel provides basic person information and permissions control what information gets released and who is permitted to see it.

Permission 358 governs access to the contact page for Person Selected access.
Permission 1050 governs access to the contact page for My Info access.
Permission 718 governs access to the contact page from within the Parent module.
Unless these permission are N/A, then the user will see the contact page for the appropriate context. Various permissions (Container = Contact Information) then govern

access to viewing the other information sections on the contact page. For example: Permission 507 governs the Show Contact Information Picture for My Info access. Permission 1023 governs the Show Contact Information Picture for Person Selected and Parent access.

Emergency Contact Information Display

Permission 359 controls access to the Emergency Contact Information for My Info Access.
Permission 1034 controls access to the Emergency Contact Information for Person Selected and Parent Access.

There is a field called Emergency Contact Priority on the Relationship Page that governs whether a record will appear in the Emergency Contact Information section. If that field is left as 0, then the record will not be displayed. A numerical value can be used in this field to display the record and also order the records by contact priority. The following information will be displayed: full name of the contact person, their phone number, mobile phone, email, relationship to this person, the emergency contact priority in case there are multiple contacts, and a comment.

Relationship Information Display Summary

The relationship record contains data elements that govern the display of relationship information on the contact page. These are described below.

Permission 471 governs display of the Parent/Relationship Information Section for My Info access. Permission 1020 governs display of the Parent/Relationship Information Section for Person Selected and Parent access.

Permission 655 governs the display of the Release Codes for My Info access. Permission 1025 governs the display of the Release Codes for Person Selected and Parent access.

Permission 472 governs the display of the Address/Phone information within the Parent/Relationship Information Section for My Info access. Permission 1027 governs the display of the Address/Phone information within the Parent/Relationship Information Section for Person Selected and Parent access.

Relationship fields

In addition to the biographical data contained in the Parent/Relationship Information section, the following fields also govern the use and display of this section.

- Hide on Contact Page. If this box is checked then that record will not be displayed. This record can then only be viewed through the relationship tab.

- Info Release Code. This field is used to designate the release level for the person specified in the relationship. If the field is left blank, it will default to “release no information”. This field is checked to ensure that information is not released to the person specified in the relationship, unless appropriate.

- Info Release Code Spouse. This field is used to designate the release level for the spouse specified in the relationship (if any). If the field is left blank, it will default to “release no information”. This field is checked to ensure that information is not released to the spouse specified in the relationship, unless appropriate.

- Secondary Relationship Type. This field is used to designate a secondary relationship for the contact. For example, the relationship type might be “Guardian” or “emergency contact”, but the secondary relationship might be “Aunt”.

- Preferred Parent. This box is used to specify the preferred parent. This information is used in subsequent processes such as mailings and grade access to define which parent has primary access to the student record. This is generally used where parents are divorced or separated and have individual records.

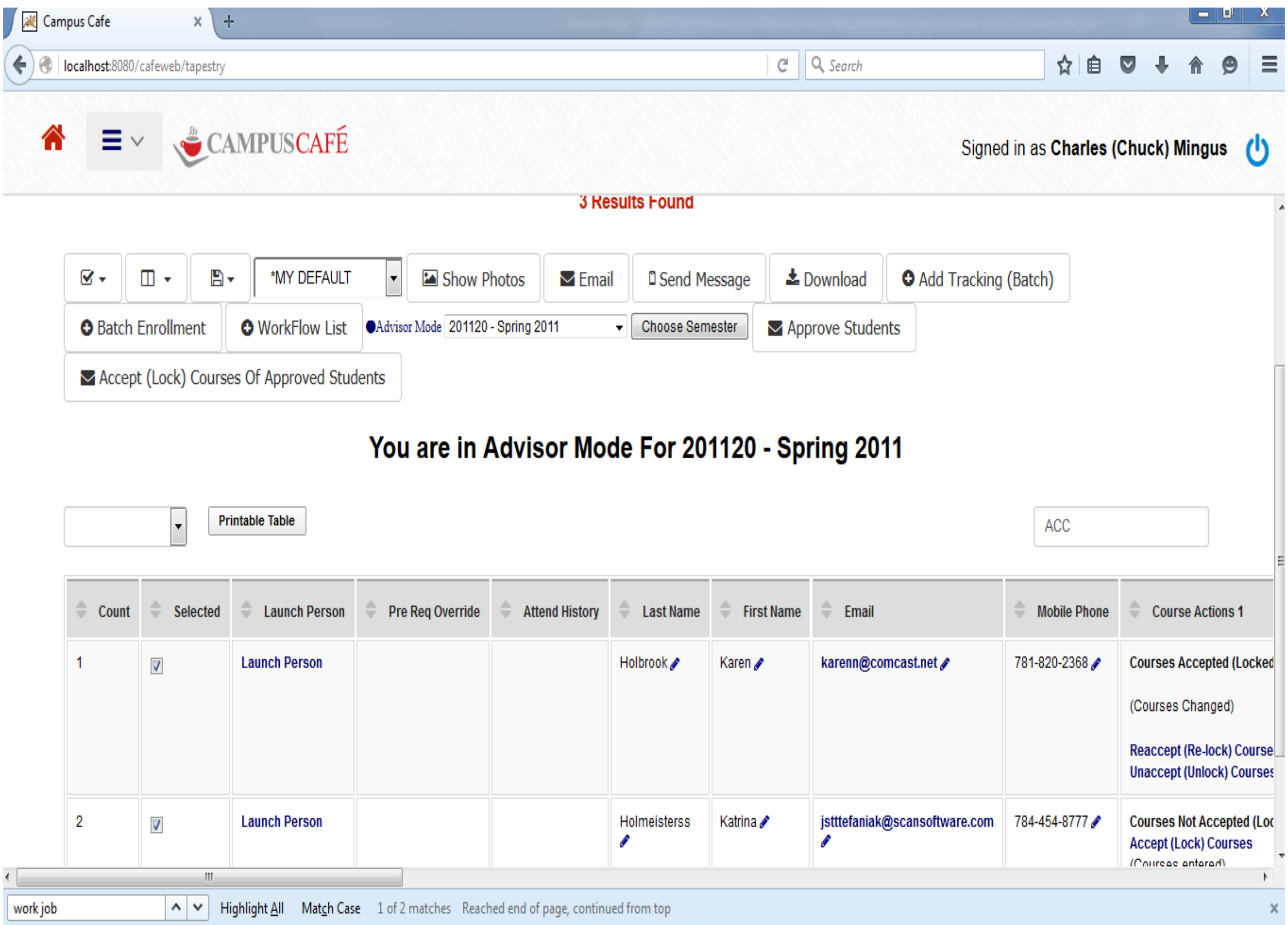
- Billing Parent. This box is used to specify which parent receives the billing statement. This is generally used where parents are divorced or separated and have individual records.

- Start Date and End Date. These dates are used to specify the beginning and ending dates for the relationship. Some examples would include start and ending dates for an employer or start and ending dates for a release code.

Advisor Interface and options

The advisor mode is a special page that contains several functions for advising students. This page can be used to add advising notes for a student for a term. It can also be used to approve and unapproved students for registration, accept and lock the registration for a student, and also to override the student registration options for each student. The student registration options include the registration begin and end date for the student, maximum credit load, maximum courses, and notes.

You can enter the advisor mode by clicking on the "start advisor mode" button in the student finder. Permission 212 governs access to this button. You will be prompted for a semester/term. The term selected will dictate the advising records that are being displayed and updated for that session until the term is changed.



You may approve, unapproved, or lock a batch of students with this interface by selecting the group and then clicking the appropriate button.

Please remember as described earlier that permissions 917-918-919 within the Advisor module govern whether you can see your own advisees only, or a larger group such as department or ‘All”. Advisors can see all of the same information that a student sees for their advisees and also set parameters and permissions for self-registration by students. An advisor can also view pictures of the advisees and send emails to all students in their advisee list.

The department chair status is determined by entering a “C” in the chairperson code in the Faculty Master record and entering the department code in the Faculty Master file. Up to ten (10) additional departments may be assigned in the multiple department maintenance option on the Campus Café Registrar’s menu.

Custom Control/MSPARMS and Permissions for the advising interface:

MSPARM WEBADVLINK:If N, grid will ONLY show if they are approved, and a link to the comments/student permission record.

Perm 944 controls if user can approve/accept for student's who are not their advisees.

Perm 212 gives user access to the Student Permission Record (RO makes it read only).

Student must have an RGWSTP record for this information to appear.

Perm 377 controls the unapprove student link.

Perm 211 controls the approve student link.

Perm 283 controls the Accept Courses link.

Perm 396 controls the Unaccept courses link.

The Advisor Approval Process

Please note that the advisor approval process only works on students that already have been assigned an advisor.

When the advisor clicks the **approve button**, a student permission record is created for that term or semester in the table RGWSTP. (SEMESTER AND TERM ARE CONSIDERED SYNONOMOUS THROUGHOUT CAFÉ WEB – UP TO 99 SEMESTERS OR TERMS MAY BE CREATED PER YEAR). A student may have up to 2 permission records per semester if they have 2 advisors. An MSPARM (WEBREGAPPR) can be configured to require that approval be given by the first advisor, both advisors, or either advisor.

The permission record includes permissible registration dates and number of courses limit constraints that default from the registration semester control file. The permission record also contains a comment section for the advisor's use. The existence of this permission record with a value of "A" in the student_approval flag allows registration to take place for the semester within the parameters contained in the record. An exception can be made by setting up a group of students who do not need advisor approval to register. PLEASE NOTE: permissions 357 in the student module (person selected) and 1046 in the my info module (register without advisor approval) are overall permissions governing the registration/approval process. If permission 357 is set to n/a, then the student must have an advisor approval in order for another person to register a student. If permission 1046 is set to n/a, then the student must have an advisor approval in order to self-register.

Clicking the **accept courses** button sets a flag course_approval in the student permission record RGWSTP to a value of "A". (This is not the approval flag for self registration). This is typically done after the advisor has met with the student. The advisor may also use the comments to record recommendations and notes for the semester.

If the student (or anyone else) makes changes to the schedule for that semester (drop/add etc) then the flag is changed to value of "C". The advisor is thus signaled that a change has occurred because the advisee listing will display the message "courses changed". The advisor may then click the **reaccept courses** button as needed.

This flag may also be used in query to determine which students have met with their advisors to get initial acceptance and which students have outstanding changes that have not been reviewed by the advisor. It can be used as a management tool on a global basis to flag potential advising issues.

Students may be batch approved for students that are currently listed with an advisor. This link is labeled "Approve Students" If they do not have an RGWSTP record for that advisor it will be added with student_approval='A'. If they do have an RGWSTP record and it has student_approval='' then student_approval will be changed to 'A'. If student_approval is anything else, however, (for example 'U') then it will not be changed.

There is a check box in the registration control that governs overall access to the batch approval function. There is a validator (perm 667) and override (perm 668) that will allow override of the checkbox.

Prevent RGWSTP records from getting orphaned

When the advisor field in cafe is changed the corresponding RGWSTP record will be changed if MSPARM ADVCHGPERM=Y.

If the adv is changed to 0 then the RGWSTP record for the semester in RGCONT will be deleted. If the adv is changed to anything else then the adv in the corresponding record in RGWSTP will be changed as well. You cannot change both advisor fields to the same advisor.

Lock Accepted Student's Schedule
When a user is attempting to change a course schedule, either by adding, dropping, or replacing a course, the following happens:

MSPARM WEBCRSACC is checked. If this is not Y then the schedule will be able to be changed as it has been before this case. If the value of this MSPARM is Y then the following happens:

Table RGWSTP is checked. If the student has a record for the current semester where course_approval=A (the student's courses have been approved by the advisor) then the following happens. (Otherwise the schedule will be able to be changed as it has been before this case).

At this point a warning will pop up telling the user that the courses have already been accepted by the advisor. If perm 514 is set to NA then the user cannot override this warning message and cannot change the schedule. Otherwise the message can be overridden and the courses can be changed.

Retention Scoring and Reporting System

Campus Café provides a retention scoring system to allow advisors and administrators to find students that have issues that may affect retention. These can include:

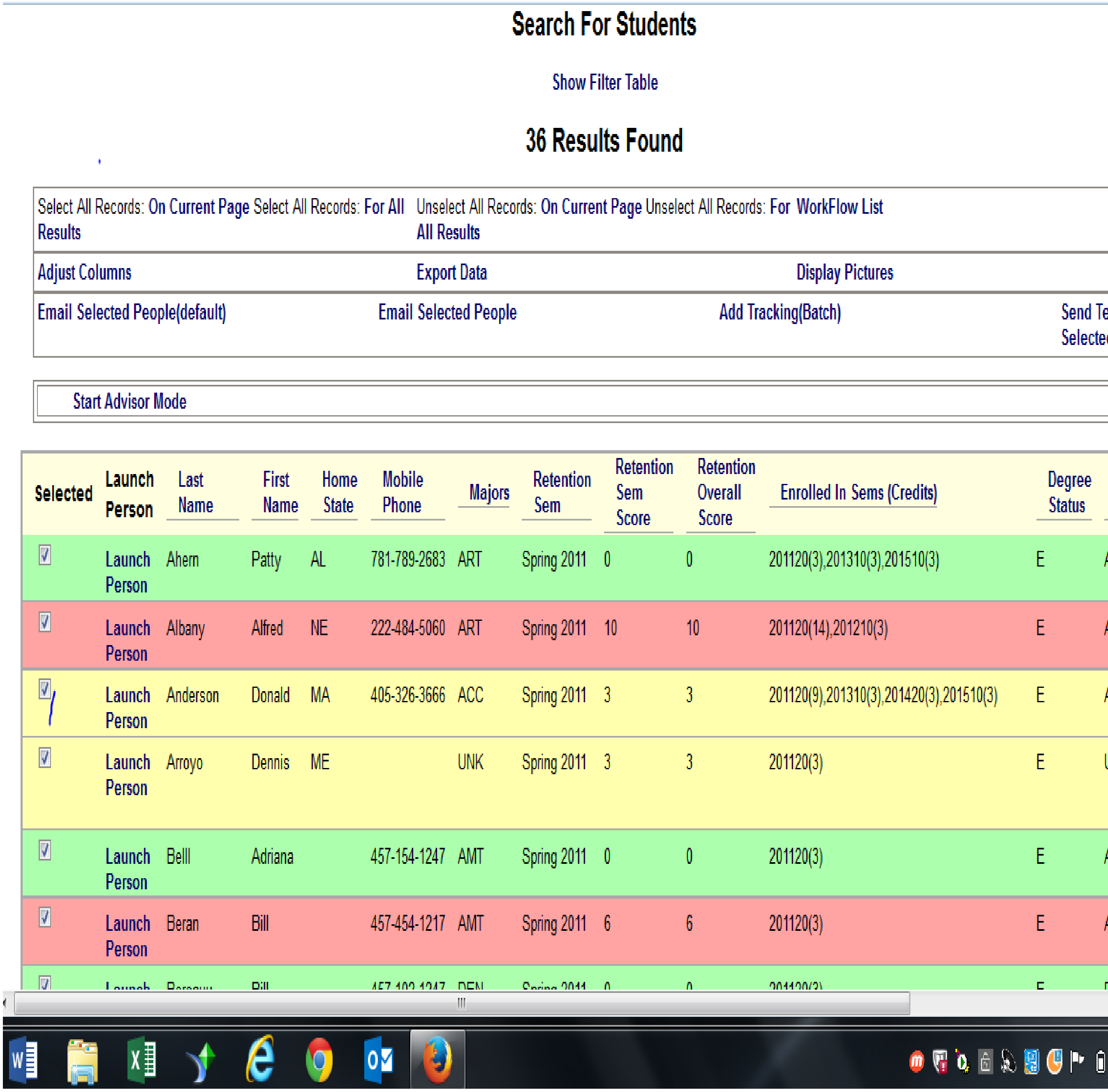
- Attendance issues
- Academic issues
- Judicial issues
- Other issues where a record with a retention score is added to the students file.

A record can be added to the student file through activity tracking. Any work flow that has a numeric “retention score” will be added to the student’s rating. For example, a faculty member adds an “academic alert” work flow to John’s student record through the course roster. This work flow includes a series of contacts including:

- Email to the student to meet with the advising office(s)
- Email to the advisor
- Automatic reminder to the advisor to ensure the meeting takes place
- Additional follow up as needed for a resolution to the issue

The system will automatically keep track of a student’s retention score for a given term and also an overall score is kept. The score is based on user definable “weighting” for an incident. Here is an example: John is a new student and has 3 absents recorded for Fall 2015, and each one has a weight of 1. He also has an academic alert for a course with a weight of 2. He also has 2 judicial issues with a weight of 3. His score for the term is 11 (3+2+6). His overall score which is a total of all terms is also 11.

The student finder can be used to easily find students with retention issues. A higher score indicates a retention alert. Below are instructions on how to configure the system with appropriate thresholds. Retention scores can be categorized through configuration to “color code” records for easy identification. For example, a retention score of 0-2 would be green, 3-4 would be yellow, and 5 and above red. The grid on the student finder will display students with the appropriate color and the grid can also be sorted so that the advisor can segment by color. Sample grid:



Search For Students

Show Filter Table

36 Results Found

Select All Records: On Current Page Select All Records: For All Results | Unselect All Records: On Current Page Unselect All Records: For All Results | WorkFlow List

Adjust Columns | Export Data | Display Pictures

Email Selected People(default) | Email Selected People | Add Tracking(Batch) | Send Te... Selecte...

Start Advisor Mode

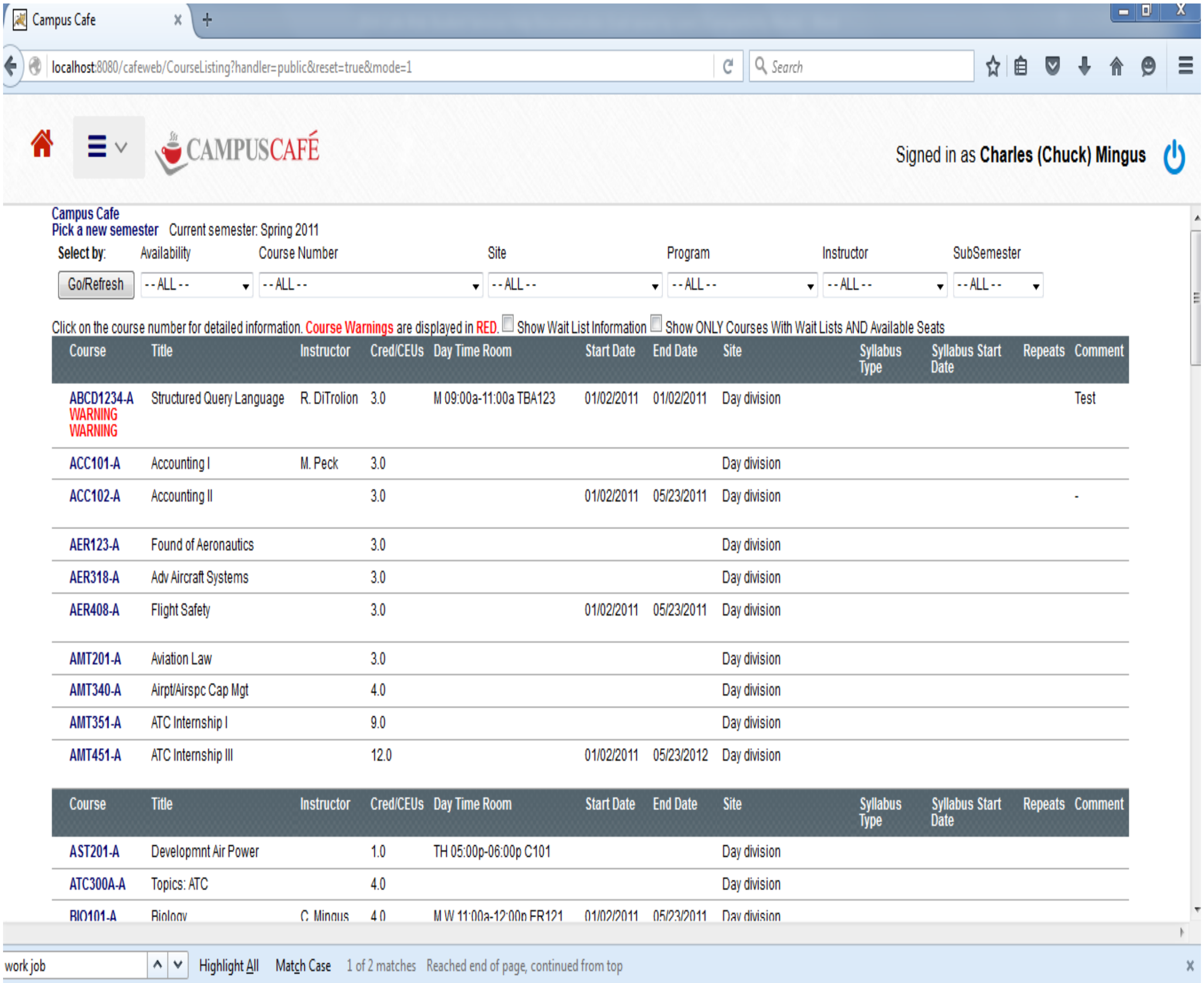
Selected	Launch Person	Last Name	First Name	Home State	Mobile Phone	Majors	Retention Sem	Retention Sem Score	Retention Overall Score	Enrolled In Sems (Credits)	Degree Status
☑	Launch Person	Ahern	Patty	AL	781-789-2683	ART	Spring 2011	0	0	201120(3),201310(3),201510(3)	E
☑	Launch Person	Albany	Alfred	NE	222-484-5060	ART	Spring 2011	10	10	201120(14),201210(3)	E
☑	Launch Person	Anderson	Donald	MA	405-326-3666	ACC	Spring 2011	3	3	201120(9),201310(3),201420(3),201510(3)	E
☑	Launch Person	Arroyo	Dennis	ME		UNK	Spring 2011	3	3	201120(3)	E
☑	Launch Person	Belll	Adriana		457-154-1247	AMT	Spring 2011	0	0	201120(3)	E
☑	Launch Person	Beran	Bill		457-454-1217	AMT	Spring 2011	6	6	201120(3)	E

Retention Scoring Configuration

System setting MSPARM RETENNUM 1-1 and 1-2 are used to segment scores by levels/colors.

Points are designated for academic/judicial alerts, or other activities by setting a numerical retention rating for a work flow. Work flows can be updated on the All Users Menu. Attendance records have a default value of 1.

Course Listing and the course listing selection options



Only display certain site courses for certain site students

This feature is useful if you have a group of students who are dedicated to a fixed selection of courses. Example: Continuing Education students might only be able to see an register for Continuing Education courses

Permission 516 turns this feature on/off. If it is set to NA the user will not have the course list restricted by MAPARM WEBREGSITE. The user's permission gets checked, so if an advisor is looking at an advisee, the advisor's permission is checked.

MSPARM is checked by the site code of the person who the action will relate to. For example, if a faculty member is looking at the course roster page it will use the faculty member's site code. If an advisor is looking at an advisee's register for classes course listing, it will restrict by using the advisee's site code.

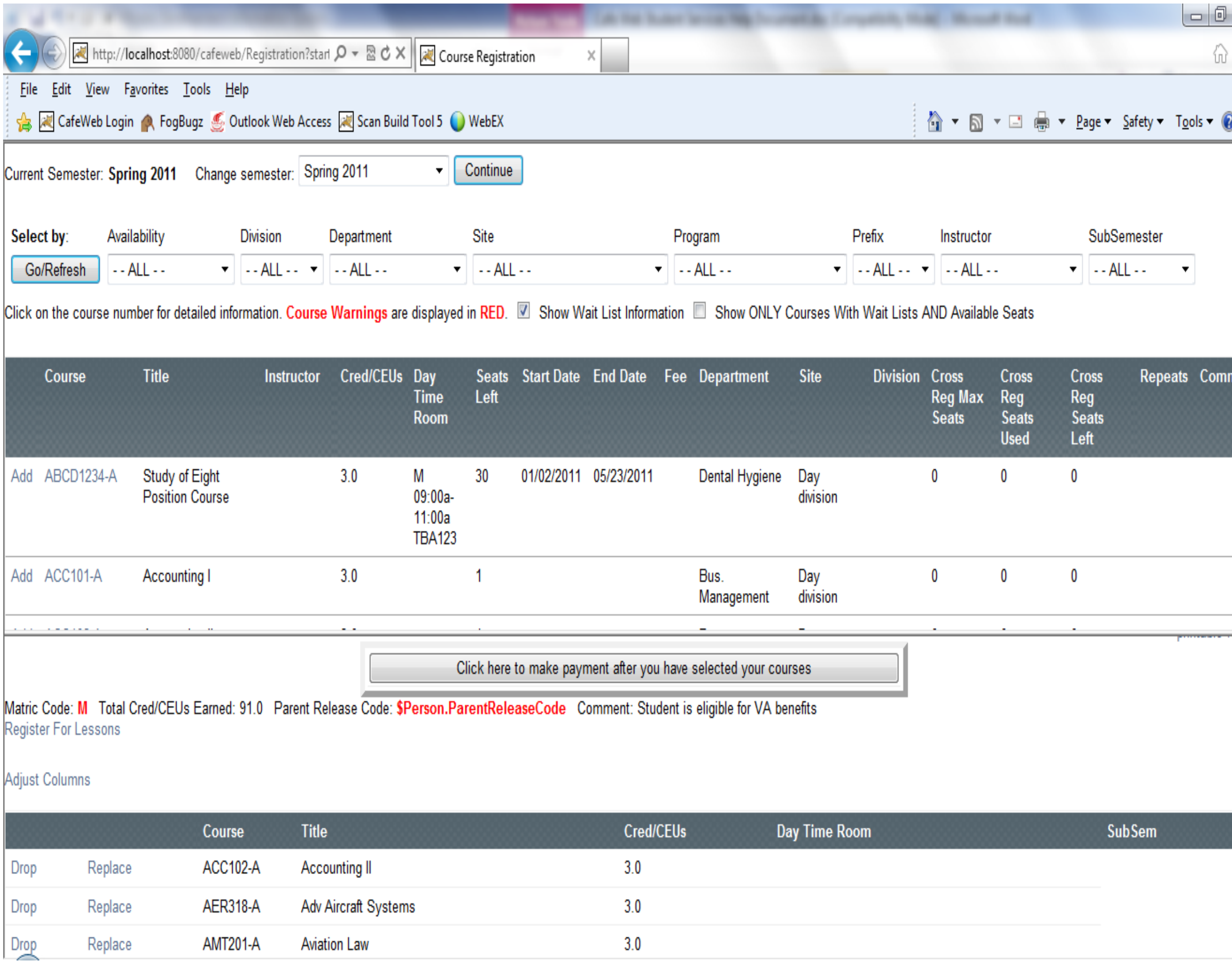
Using that site code, the program will check the MSPARM WEBREGSITE to see what sites the site is allowed to see. For example, if it is looking at a person with site code=1, it will search the MSPARM to find an entry that begins with the number 1, and then a hyphen. Following that will be a comma seperated list of allowed sites. 1:2,3 will allow someone of site code 1 to see sites 2 and 3. 1: will allow someone of site code 1 to see all courses with no site code. If someone has a site code that is not listed in the MSPARM then that person can see all courses in.

This restricts what is in the drop down list, and also restricts the default course listing for the person. The default listing will only include allowed sites. In the drop down list search the entry --ALL-- will represent all sites that are allowed through the MSPARM.

The PUBLIC COURSE LISTING is subject to the permissions in group WEBDEFAULT. If permission 516 is configured as to filter courses by site in the GROUP WEBDEFAULT, then this will also cause the PUBLIC COURSE LISTING not to display any courses since the site is not known. If this feature is used, it is recommended that the students be in another group other than WEBDEFAULT, so as not to affect the public course listing.

Course Basket and the Register for Classes Process

Example of a course basket and registration options



Courses may be added directly to the course basket using the data elements at the top of the course basket or they may be added using the course listing and clicking the **Add** button.

All additions to the course basket are in real time and once a course is added to the course basket, the seat is allocated in the course master file.

All additions are subject to restrictions that are built into the registration process through configurations in MSPARM and SYPERM. Some examples are prerequisites, co-requisites, major restrictions, class level (freshman, sophomore etc) restrictions, class full, time conflicts, and holds from the various hold code arrays such as bursar holds.

All restrictions can be overridden if the user has permission for the override.
All Validators (except Duplicate Key) can be suppressed if the corresponding Dialog SYPOBJ (type="V") record is set to NA. This means that the validation doesn't occur

and the enrollment process proceeds unabated. Please note that now there are two modules in use – Advisor (AV) and Student (ST). This does increase the number of SYPOBJ records to factor into group permission sets but does increase the flexibility based on User role.
Below is a brief list of the Validators used in the course basket add/drop process.

ADD Validators

			SYPOBJ ID			
Process Order	Exception Condition	Validator Type	AV Dialog	AV Override	ST Dialog	ST Override
1	true if enrollment date within Registration Control/Student Permission start/end dates	Registration Period Validator	556	557	520	521
2	Registration period already ended	Registration Period Validator	556	557	520	521
3	true if pre-reqs are not met by history	Pre-requisite Validator	562	563	526	281
4	true if co-reqs are not met by history	Co-requisite Validator	564	565	528	356
5	true if line code >= course line code restriction	Line Code Validator	566	567	530	348
6	true if course major restriction not blank and not same as degree major	Major Restriction Validator	568	569	532	347
7	true if dupe course found	Dupe Course Validator	560	561	524	381
8	true if student's TOK code in restricted TOK	TOK Code Validator	570	571	534	398
9	Student hold – course add	Code Restriction Validator	599	595	598	413
11	Student hold - course replace	Code Restriction Validator	599	597	598	415
12	true if enrollment fails to meet matriculation limits and msparm WEBREGCONT-1-5 = Y	Matriculation Validator	578	579	542	417
13	Matriculation credit limit exception	Matriculation Validator	578	579	542	417
14	true if course is already underway and msparm WEBREGCONT-1-3 = Y	Course Start Validator	572	573	536	449
15	true if course is already underway and msparm WEBREGCONT-1-3 = Y	Course Start Validator	572	573	536	449

16	true if enrollment has time conflicts	Time Conflict Validator	580	581	544	450
17	true if advisor(s) permission is met or not needed	Advisor Approval Validator	558	559	522	523
18	course too many in history	Student Credit Validator	574	575	538	539
19	course < 3 credits (ge3)	Student Credit Validator	574	575	538	539
20	course > 3 credits (lt3)	Student Credit Validator	574	575	538	539
21	course min credits	Student Credit Validator	574	575	538	539
22	true if course is not yet full but RGCRSE cancelled flag=Y then course is cancelled	Course Cancelled Validator	584	585	548	549
23	true if course is not yet full but RGCRSE closed flag=Y then course is closed	Course Closed Validator	582	583	546	547
24	If course status=F then course is frozen (closed to add/drop)	Course Frozen Validator	692	693	690	691
25	true if either perm has Advisor "A" in course approval field	Course Approval Validator	576	577	540	541
26	Prompt for Waitlist if over-enrolled	Course Wait List Validator	588	589	552	553
27	Prompt to force seat increment if over-enrolled and not going on waitlist.	Course Full Validator	586	587	550	551

DROP Validators

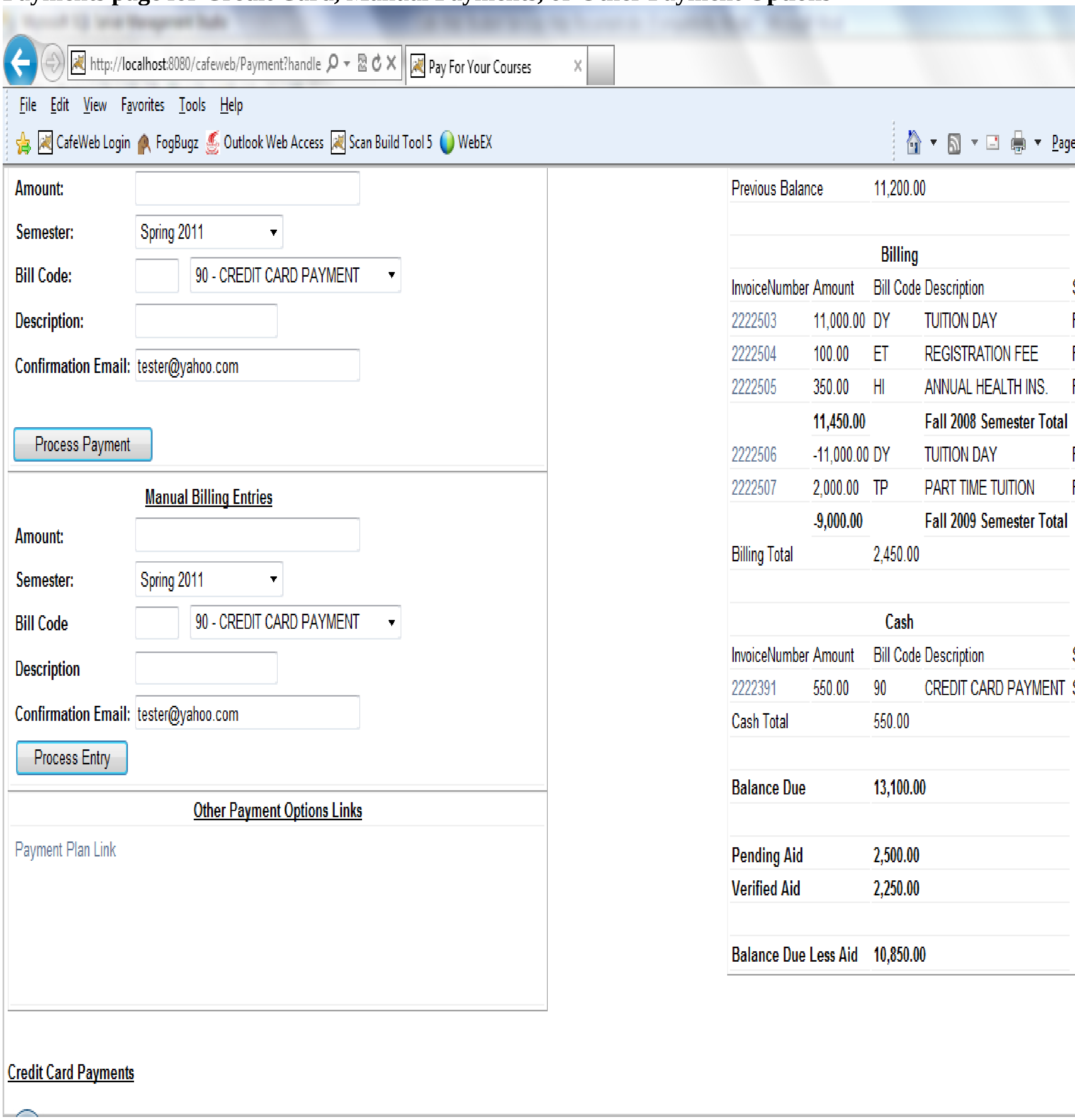
			SYPOBJ ID			
Process Order	Exception Prompt File	Validator Type	AV Dialog	AV Override	ST Dialog	ST Override
A	Generic drop enrollment warning prompt	N/A	590	-	601	-
1	drop course in session exception	Course Start Validator	572	573	536	449

2	course too many	Student Credit Validator	574	575	538	539
2	course < 3 credits (ge3)	Student Credit Validator	574	575	538	539
2	course > 3 credits (lt3)	Student Credit Validator	574	575	538	539
2	course min credits	Student Credit Validator	574	575	538	539
3	TOK hold	TOK Code Validator	570	571	534	398
4	Student hold - course drop	Code Restriction Validator	599	596	598	414
4	Student hold - course replace	Code Restriction Validator	599	597	598	415
5	Student hold - course approval	Course Approval Validator	576	577	540	541
6	Matriculation code exception	Matriculation Validator	578	579	542	417
6	Matriculation credit limit exception	Matriculation Validator	578	579	542	417
7	If course status=F then course is frozen (closed to add/drop)	Course Frozen Validator	692	693	690	691

Once a course is added to the basket, a schedule may be printed or the user may enter the **payment options** page.

Payment Screen Options

Payments page for Credit Card, Manual Payments, or Other Payment Options



The Payment Screen is accessible from the Course Basket Screen via the “Payment Options” link which is restricted via permission # 237 (Course Payment). Once the screen loads, two main sections appear. On the left there are four tables stacked on top of each other, and on the right there is a summary table.

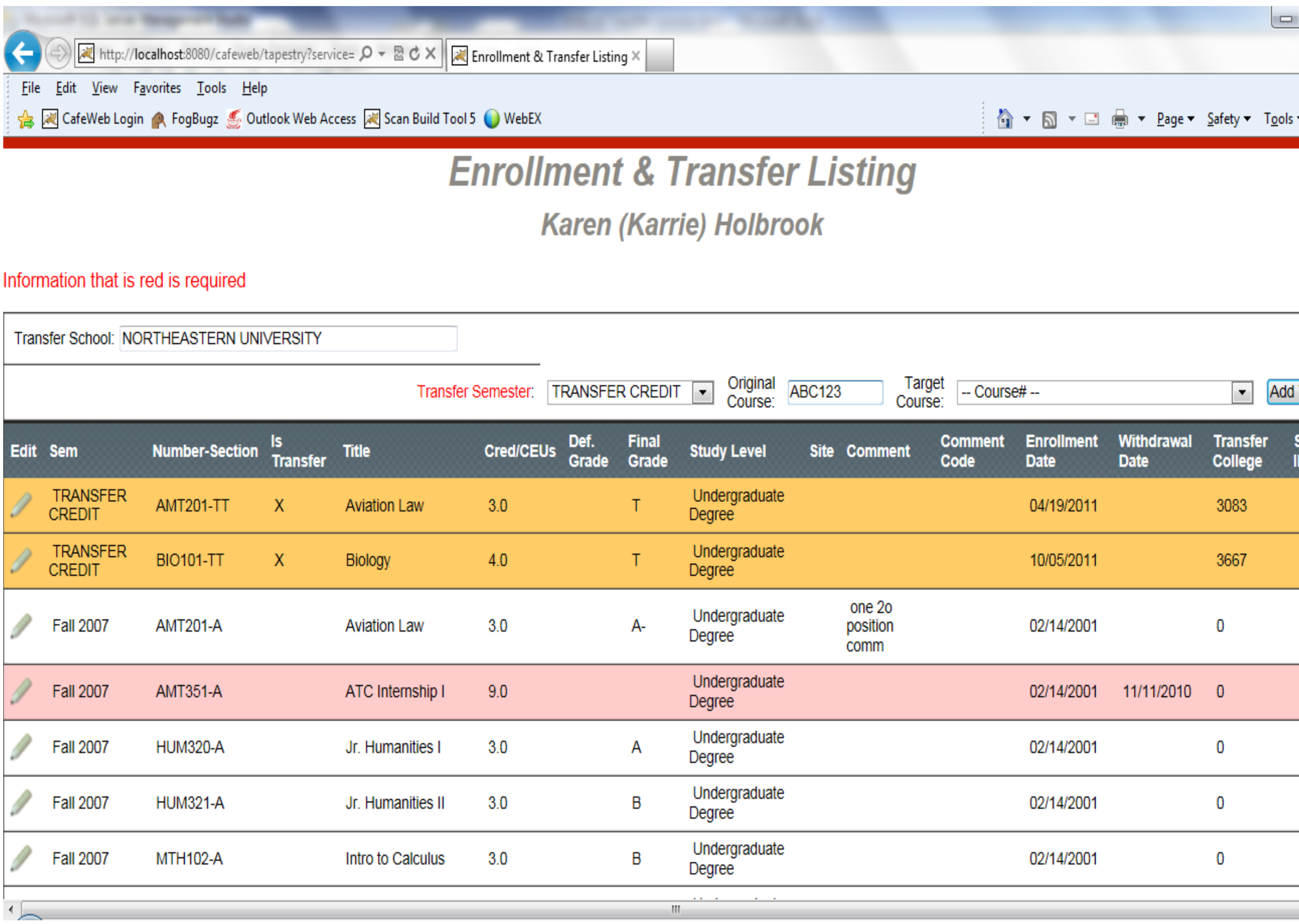
1. Summary table
   This table summarizes the transactions which have occurred so far. At the top it shows the previous (beginning) balance, then it lists billing transactions along with their total, followed by the cash transactions, followed by their total, finally followed by the projected final balance (pending approval and account posting). The individual items in the table can all be clicked, which will cause them to be re-entered into their respective tables on the left, from where they can be modified or deleted.
2. Manual Cash Payment Table
   This table accepts manual cash entries (cash, checks, etc.). This table is restricted via permission # 478 (Cash Payments). The entries in this table will end up in the ARCBAT table in the database, and will cause a confirmation email to be sent to the student as well as to the email addresses listed under PAYMENT_CONFIRMATION_EMAIL_ADDRESS and PAYMENT_ADMIN_EMAIL_ADDRESS entries in the table SYWCFG.
3. Manual Billing Entry Table
   This table accepts manual billing items (discounts). This table is restricted via permission # 479. The entries into this table will end up in the BIBBAT table and will cause a confirmation email to go out to the student as well as to the emails listed in the above-mentioned entries in the SYWCFG table.
4. Other Payment Options Link Table
   This table lists the links leading to other payment option forms. This table is restricted via permission # 485. The links originate from the WBLINK table and must obey the following rules:
   a. They must all be named as LINK_BOX_<number> where <number> is any positive integer.
   b. The value must be the text of the link.
   c. The description must be the absolute url (containing the http:// part) of the link.
   d. They must lead to valid, existing, html pages.
   e. Cafeweb versions prior to 3.1.1rc1 used the WBTEXT table to store these links. Please migrate to the WBLINK table these records manually if using a later version.
5. Credit Card Payment Table
   This table will accept credit card payments. This table is restricted via permission # 484. The entries in this table will end up in the ARCBAT table upon successful charging of the credit card. Configurable options allow the institution to set up automatic payment notification with Paypal. The server must be configured to handle communications with the credit card processing servers. A successful entry into this table will also cause the above-mentioned emails to be sent.

Other notes on the Payment System

1. The Member column of the ARCBAT and BIBBAT tables gets filled in with WB<date> where <date> is the current date in the yyyymmdd format. This in turn causes the summary table to display only the transactions made on the current day. It also allows for posting batches from the day before while not affecting the current day’s batches.
2. In addition to showing only the transaction for the current day, the summary table shows only the transactions for the current student and the current user (registrar, bursar, administrator, student, etc.). This is controlled via entries of the current user’s id into the ENTERED_USER_ID and CHGE_USER_ID columns of the ARCBAT and BIBBAT tables, and the student’s id into the USER_ID column of the two tables.

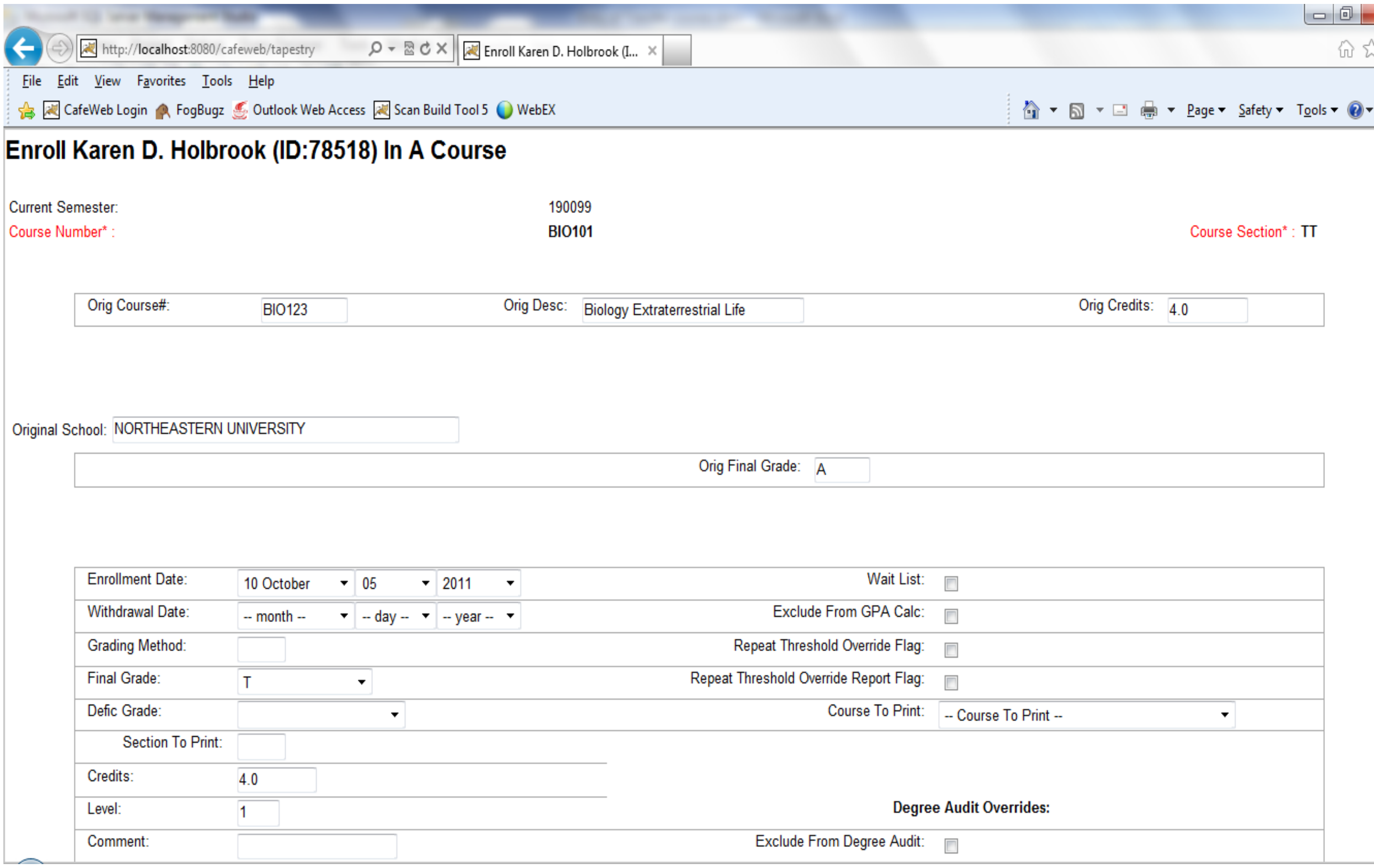
Entry of Transfer Courses

Entry of transfer courses is done through the enrollment listing page. You must first pick a transfer school using the school lookup. The school look up normally contains all CEEB records (this file can be refreshed by contacting the College Board) and any additional schools that you may choose to add if the school desired is not contained in the file. Additional school records can be added through the Campus Café interface. Once the transfer school is chosen, it will be displayed as shown below. Once a school is chosen, it will persist on subsequent transfers.



The next step is to select the transfer semester from the drop down list and enter an original course number. The original course number is optional as it is possible to enter the transfer with your institution's number only and have this number appear on the transcript.

If there is a previous entry from the transfer school with the same original course number (Articulation), then you may leave the Target Course blank and click add transfer. The system will find the last entry from the transfer school and automatically fill in the matching course number from your institution. If an entry is not found, then a message will appear to instruct you to fill in the Target Course number.



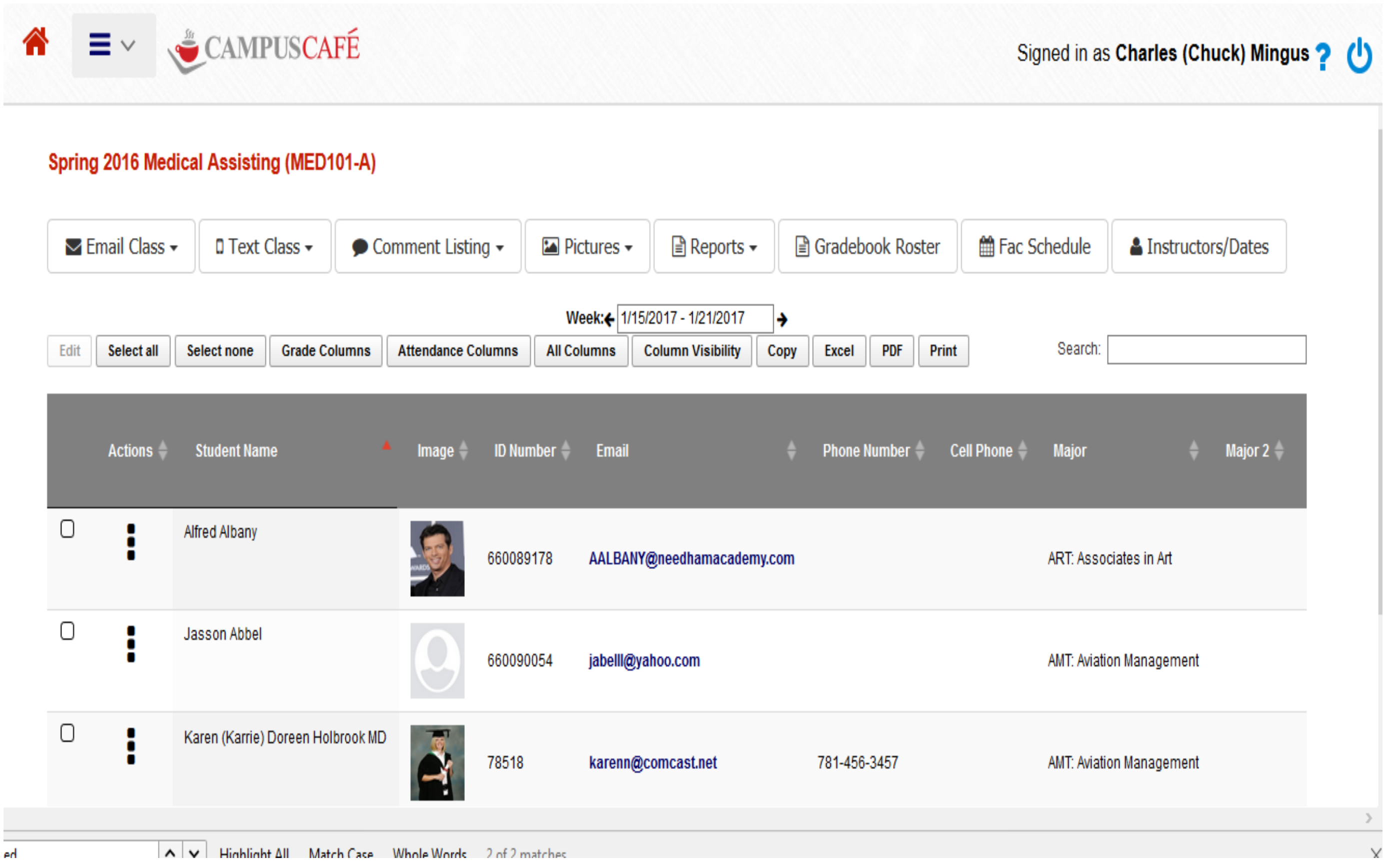
The next page will allow you to add the transfer course. You may optionally enter the original final grade and description on this page. If a final grade is not entered, then the system will default a final grade based on your default. Typically, a grade of "T" will be defaulted into this field unless another default transfer grade is set up. The default is set up by entering a transfer grade flag in the quality points table interface in Campus Café. If more than one grade is flagged as transfer, and no final grade is entered, the system will select the first transfer grade it finds.

Transfer courses will appear on the transcript in the semester for which they are entered. They will behave according to the rules set up in the quality point table and the entries made on the transfer enrollment. For example, using a grade of "T", if the flag in the quality points table for inclusion in the GPA is set to yes, then the the transfer would be calculated in the GPA. Setting this flag to no will exclude the transfer from the GPA calculation.

Transfer enrollments are stored in table RGENRL along with regular enrollment records. They are distinguished from regular enrollments with the IS-TRANSFER flag.

Additional fields in the RGENRL record exist to track the original school, description, and grade.

Course Rosters and Grade entry



The class roster contains many useful functions for faculty or administrators to

- Communicate with students
- View their pictures
- Add assignment grades through the related gradebook roster
- Add/update midterm/final grades and comments
- Trigger an email based on a midterm or final grade entered/changed
- Add/update attendance/comments or clock hours
- Email the class
- Text the class
- Add academic alerts through the activity tracking interface
- Access/update the student record through the contact page

There is a special trigger for change of midterm, year, or final grades that can be used to create a work flow. This can be used to notify a student, advisor, etc. when any grade is assigned or changed.

Example:

We’d like to set up a workflow where whenever the student receives a failing grade, they are notified by email.

Solution: Set up a trigger based on a final grade of F as seen in below screen shot.

Here are some samples for other grades such as Deficiency (midterm).

Set up a Template Request under the DATABASE group to fire a tracking/email if an enrollment’s grade changes (including final, deficiency and year-long grades). These template requests should use following trigger name pattern as they are hardcoded.

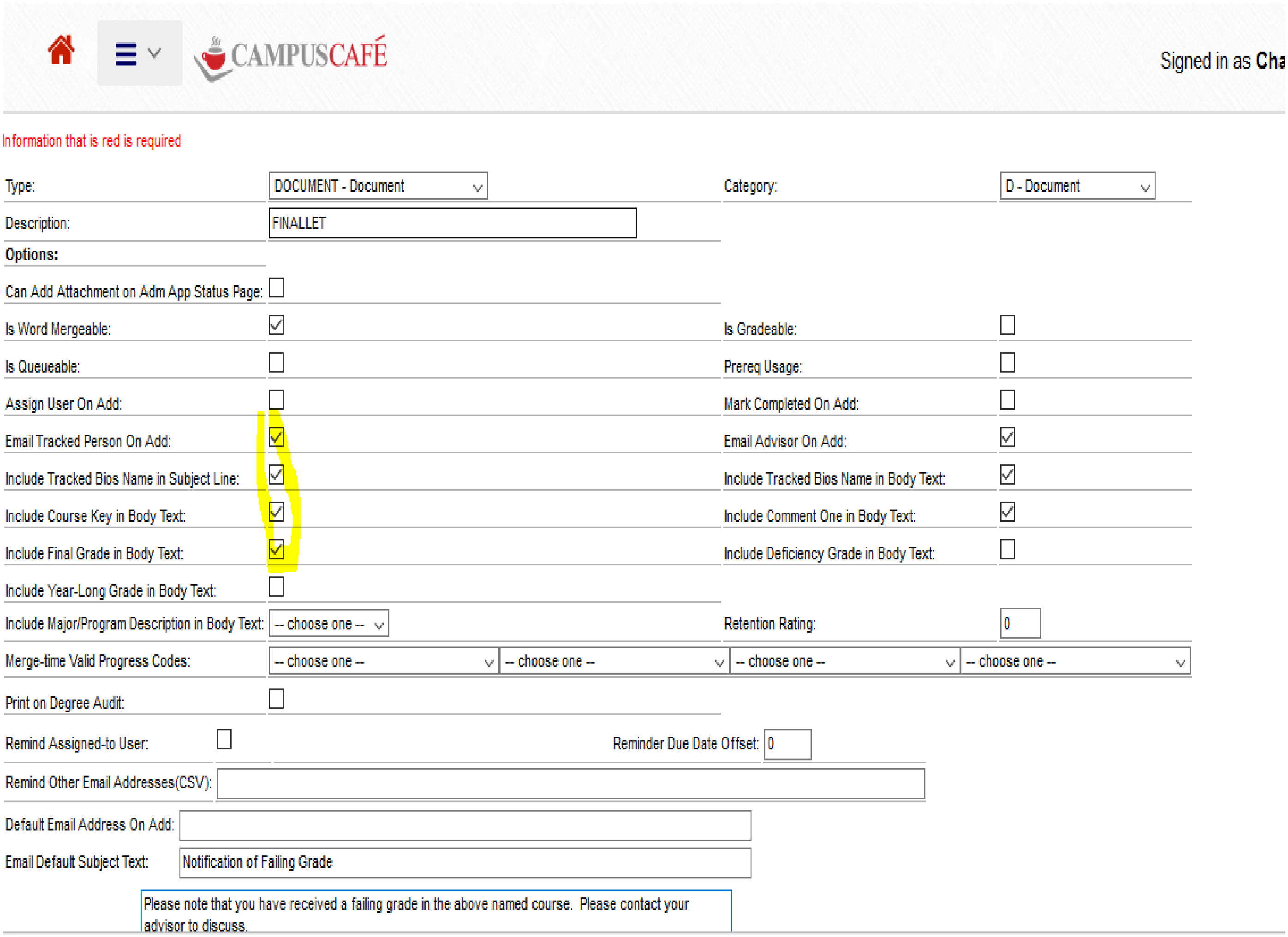
Final grade change trigger = REFLGR-x (where x is the value of the final grade)

Deficiency grade change trigger = REDFGR-x (where x is the value of the deficiency grade)

Year long grade change trigger = REYLGR-x (where x is the value of the year long grade)

COLLEGE	SC	0	TRANCOL03	Third Prior College	Mingus, Charles (Chuck) #660088110	04/10/2013			745
DATABASE	H - Hidden Value(H)	0	REFLGR-F	Trigger for failing grade activity tracking	Mingus, Charles (Chuck) #660088110	11/21/2016			752
DOCUMENTS	T - Text Value(T)	1		Course Catalog	JS	06/08/2006			41
DOCUMENTS	T - Text Value(T)	2	DAYINQ	Please send me information about City College			JS	09/05/2008	3

Set up a Work Flow Definition(ADWFMS) with appropriate check boxes to include key data in the email to be sent as below:



Use the activity tracking system to store and send the email.

Course Rosters Grid functions and configuration

The Roster Grid contains general functions to adjust columns, select certain student records for view/update using the “Edit” button, copy data, export the roster to excel or PDF, and print.

Here are some error checking, permissions, and configurations that exist within the roster interface:

Error Checks

- Does not allow attendance to be taken if a student is on Leave of Absence (an open date bracket on a status history LOA record)
- Attendance Comments cannot be longer than 125 chars.
- Clock hours must be less than 1000 minutes.

- Minutes/Hours must be numeric
- Can't be marked absent and also have clock hours

General Permissions

756:RO for Attendance Notes Drop Down
756:NA for Attendance Notes Drop Down
733:RO for absent checkbox, attendance notes, absent comments
733:NA for absent checkbox, attendance notes, absent comments
728:RO for hours/minutes attended
728:NA for hours/minutes attended
1136:NA hides id number column
988:NA hides Amount Due Column
1114:NA hides billing site column
361:NA: can’t enter final grades for other people’s class & can’t view comments
362:NA: can’t enter deficiency grades for other people’s class & can’t view comments
770:NA: can’t enter deficiency grades for other people’s class & can’t view comments
353:can’t change deficiency grade when already set
316:NA: can’t change final grade when already set
772:NA:can’t change yearlong grade when already set.
352:NA:Can only change deficiency grades based on grade control record RGWGCT
278:NA:Can only change Final Grades Based on grade control record RGWGCT
771:NA: Can only change Year Grades Based on grade control record RGWGCT
354:NA:Can only see grades designated as useable by faculty for deficiency, otherwise see all grades
317:NA:Can only see grades designated as useable by faculty for final, otherwise see all grades.
773:NA:Can only see grades designated as useable by faculty for final, otherwise see year grades.

Header Permissions:
NA:480 hide picture listing
NA:687 Client Email Link
NA:688:Default Email Link
NA: 881: Final Course Comments
NA::880:Midterm Course Comments
NA:2009:Gradebook Roster (Also needs to exist for course in order to appear).

Individual Student Button Permission Links:
1090:NA:Activity Tracking
1091:NA:Add Tracking
766:NA:Attendance History
1133:NA:Clock Hour Report
360:NA: Hides Contact Info Link If Looking at Other Fac’s Roster

Event based permissions:

903:NA:Cannot unlock grade comments
1070:NA:Cannot set note to blank if it is already filled out.
1069:NA:Cannot change absent flag if attendance note exists

Custom Parameters (MSPARMs)
GRADE_COMM: Y allows you to see the grade comment and grade comment lock fields.

Removing attendance module removes all attendance fields.

ATTEND_VAL=Y && 1147:NA: Can’t give attendance on date that not in session.

Campus Café Web Active Directory Creation Strategies

Creation for an active directory for authentication

Some scenarios:

There is a need for a student to have the ability to sign up for a class on line.
.

There is a need for alumni, friends, and other constituents to make donations using the Campus Café Web Payment interface.

There may be a need for a prospect to sign on to get Admissions Status or Financial Aid data.
These users need a user id and password. This may be in active directory or in the Campus Café database. This leads to the following needs:

1. Necessity for a master list of usernames
2. Creation of active directory entry
3. Authentication of active directory

MASTER LIST AND CREATION OF ACTIVE DIRECTORY

Creation of an active directory necessitates that a master list is stored to prevent duplication of usernames. Campus café has the ability to automatically create an SYUSER record with appropriate GROUP and an EMAIL record for all sources listed below except Other.

Possible sources of users:

Applicants – in SYUSER
Students – in SYUSER
Staff – in SYUSER
Alumni – in SYUSER
Friends, Orgs, Almast etc – in SYUSER
Other – these may not be in SYUSER but should be added to STBIOS so they get a username in SYUSER.

Example

James Sullivan Sr. is a student/alum SYUSER id is james.sullivan
James Sullivan Jr. is a student SYUSER id is james.sullivan01 (or some other scheme).
Campus Café supports several naming conventions.

Another James Sullivan Applies to the university. He can reliably be assigned james.sullivan02 because SYUSER is unduplicated.

The institution can export selected groups for creation of Active Directory Entries, Email Accounts, Network Accounts and others.

Upon exporting, the password can be removed from SYUSER. This means that SYUSER essentially is just a non-duplicated list of user names. If applicant records are purged from ADMAST, then the associated record in SYUSER can be deleted and that username/sequence combination can be reused.

If the institution does not wish to export all SYUSER records to Active Directory (eg applicants), then such applicant will still have a user id in SYUSER and can be authenticated there as explained below.

AUTHENTICATION

The third party software (example Campus Café Web) would authenticate against the active directory first. If an entry is found, then the user can enter the application software. If the Active Directory entry is not found, then the user would be secondarily authenticated against the SYUSER table and allowed into the application.

This gives the institution maximum flexibility and allows for the immediate creation of an account as it occurs (most typically an applicant logging in, or a student in self service.)

Campus Café Web Session Data Creation

Session data rows are now needed for most Café functions. A session data row is essentially a term/semester (term, semester, and session can be used interchangeably within the context of this documentation) based record that contains information about a student. Such records are necessary to record key information on a historical basis. Some examples would be the housing status, billing site, insurance waiver etc. These values may change from term to term and are available in the session data row. Although some of these data elements may exist in STBIOS or other static tables, it is recommended that session data be used for reporting and other functions, since the data will be historically accurate and not subject to change with each session data record.

Because a session data row is now required for each student for each term/semester, strategies must be developed to copy these records from one term to another. There are several contexts where session data records can and will be created during Café processes.

Café

- Created manually via Housing or Registration modules using Session Data tab panels.

- Created with bulk copy from semester to target semester. Optional data check boxes will copy the selected data values to new record. Otherwise they are blank.

  Session data rows will only be copied if the source semester contains at least one non-withdrawn RGENRL (enrollment) record. This is to prevent the propagation of records for students who are no longer active. If a student reactivates, it may become necessary to have a strategy to create the appropriate session data row at that time.

  SessionData rows are no longer copied directly from/to STBIOS/STMAST but only from other session data rows.

  Site number is optionally selectable to be copied from either STBIOS.SITE_NUMBER (SBCONO) or HOHIST.SITE_NUMBER (HOCONO) on runtime. The default for this can be set using MSPARM AD100-1-6 = Y.

- Created automatically in Admissions Panels on a progress code change to Y, A or P. Use MSPARM AD100-1-5 = progress code value to set the auto-insert threshold (i.e. an AD100-1-5 set to A will only auto-insert a SessionData record if the applicant’s progress code changes to A.

Columns filled during auto create in Admissions Panels:

Current_semester: source = STBIOS.ADMISSION_ENT_SEM
County_code: source = STBIOS.COUNTY_CODE
Resident_code: source = STBIOS.ADMISSIONS_RES_CODE
Site_number: source = STBIOS.ADMISSIONS_SITE

- Created automatically in Admissions Panels on a progress code change to Z. Use MSPARM AD100-1-4=Y to activate this feature. Data copied will be same as above YAP progress code change event.

- Create automatically by BillMatrix group billing.
  MSPARM MTX_HOCRT-1-1=Y will create a Session Data record for any student missing one for the billing semester. The data for the new record is copied from the highest semester Session Data less than the billing semester. The new record will be blank except for the county_code, the site number which will optionally be copied from either STBIOS.SITE_NUMBER (SBCONO) or HOHIST.SITE_NUMBER (HOCONO) on runtime (the default for this can be set using MSPARM AD100-1-6 = Y) and the resident code = C.
  If no prior session data records exist none will be inserted and the group billing will fail.

Cafeweb

- Create automatically via Course Registration validation
  MSPARM MTX_HOCRT-1-1=Y will create a Session Data record for any student missing one for the registration semester. The data for the new record is copied from the highest semester Session Data less than the registration semester. The new record will be blank except for the county_code, the site number which will optionally be copied from either STBIOS.SITE_NUMBER (SBCONO) or HOHIST.SITE_NUMBER (HOCONO) on runtime (the default for this can be set using MSPARM AD100-1-6 = Y) and the resident code = C.
  If no prior session data records exist none will be inserted and the billing will fail on the Web payment screen. A message will appear notifying the user that no session row exists and the billing may not be calculated. This message may be turned of by setting the no session data validator prompt permissions 827(Adv) and 829(Stu) to NA.

- Create automatically via Inquiry Main and Holding Lookup page submit events.

  Auto-inserts on MSPARM AD100-1-5=Y and the submit app config (ADCUST) mode = Application record existing. The progress code at submit must be a Y to invoke this insert. If AD100-1-5 value is A or P then the insert will not occur. Inquiries (progress code I or L also will not insert).

Columns filled:

- Current_semester: source = STBIOS.ADMISSION_ENT_SEM
- County_code: source = STBIOS.COUNTY_CODE
- Resident_code: source = STBIOS.RESIDENT_CODE(correct?) or C if blank.
- Site_number: source = ADCUST.DEFAULT_BILLING_SITE or zero if null.

Degree Row Creation and Functionality

The degree table is a key table and a person must have at least one degree row in order to be visible in the student finder. There are many scenarios where a degree row might be created. *(Note: the word major and program may be used interchangeably in the following examples.)*

Example 1: A student changes majors. The old degree row is marked inactive with a status date equal to the last date of attendance in the old program. A new degree row is created with the new major. This should be marked as the current degree. This is useful for keeping a historical record of the student's academic record, and is also used for government reporting such as changes of program to NSLDS.

Example 2: A student is about to finish their undergraduate degree and is now applying for a masters degree. They create a masters application and are accepted. A second degree row must be manually added containing the masters degree information because the admissions process will not create or change a current student record. See screen shot below.

Add New External Degree

Click on "Add Internal or uncheck for External Deg" to access a new blank degree page to add a new external degree. If adding an external degree, all majors are available for selection. External degrees are those from other institutions and have a non zero school code. Internal degrees are degrees from your institution and have a school code of zero. The Campus Cafe Admissions Module can also automatically add an internal degree based upon changes to the progress code and parameters set on your database as described below.

Edit Degree

Double click on the desired degree, or click once to highlight, and then click on the Edit Degree button. The degree edit page will appear for viewing/updating.

IMPORTANT

For IPEDS, NSLDS/Clearinghouse and other tracking purposes degree rows should not be deleted, or overwritten when a student changes their degree, withdraws, or comes back for an additional program. The degree row should be historically accurate as to the start term, end term, (or start and end date), program, type of program/degree, level, and other relevant information. Only one row can be marked as current. On any other row, the status should be W (withdrawn), Y (graduated/conferred), C (completed). If you wish to remove the row from appearing on the transcript or degree audit, it can be changed to a level 4.

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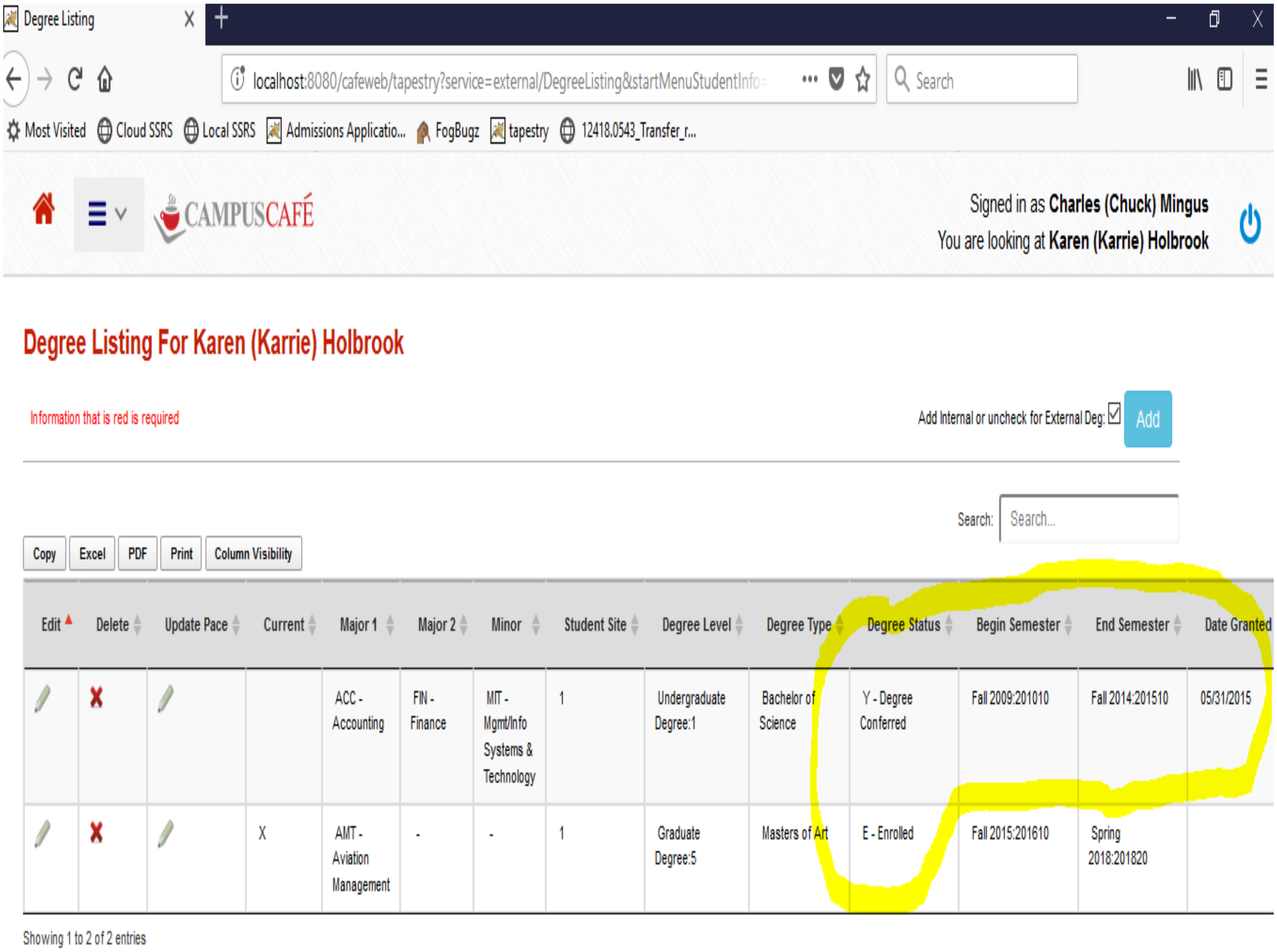
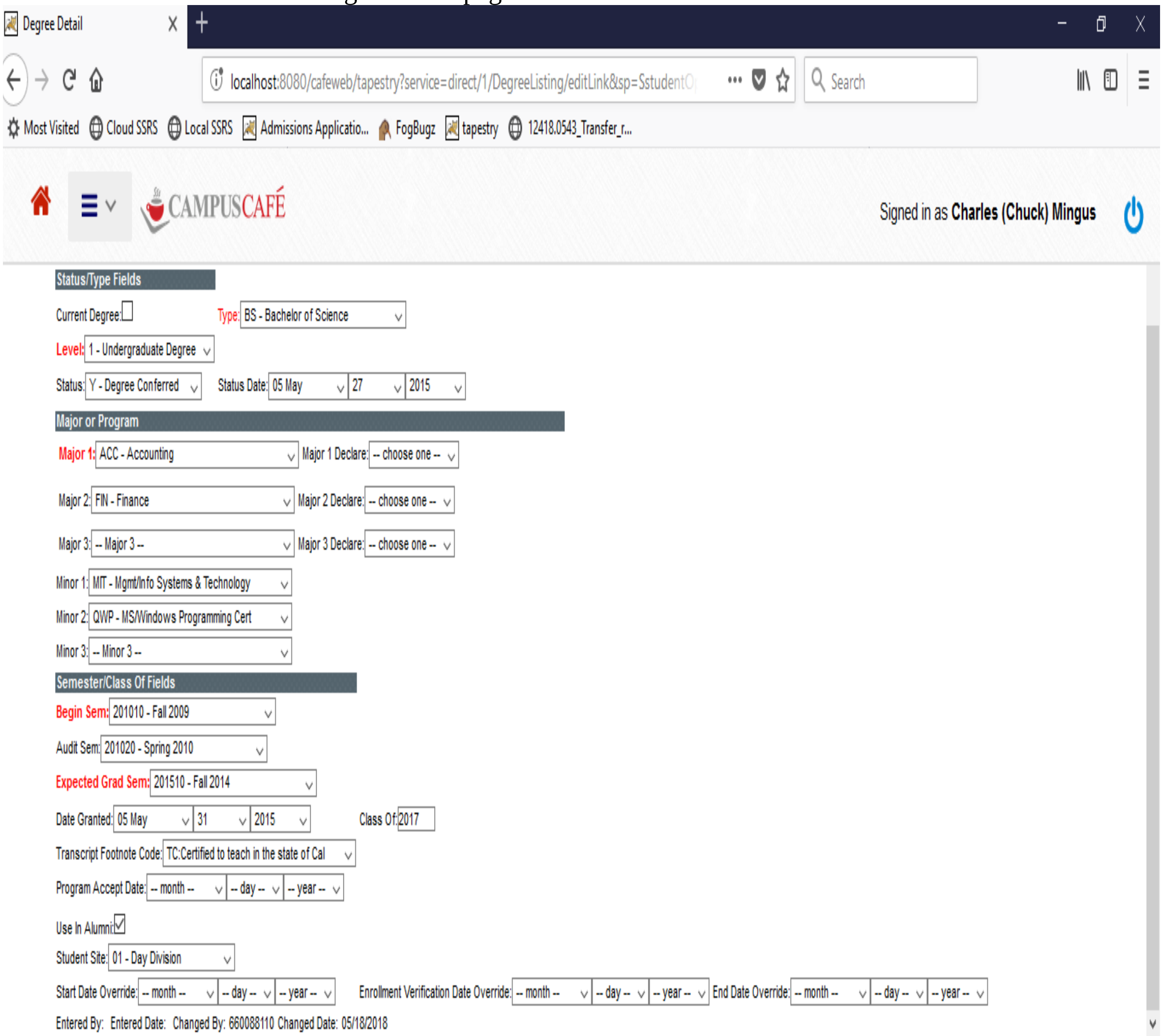


Edit	Delete	Update Pace	Current	Major 1	Major 2	Minor	Student Site	Degree Level	Degree Type	Degree Status	Begin Semester	End Semester	Date Granted
				ACC - Accounting	FIN - Finance	MIT - Mgmt/Info Systems & Technology	1	Undergraduate Degree:1	Bachelor of Science	Y - Degree Conferred	Fall 2009:201010	Fall 2014:201510	05/31/2015
			X	AMT - Aviation Management	-	-	1	Graduate Degree:5	Masters of Art	E - Enrolled	Fall 2015:201610	Spring 2018:201820	

An initial degree row will be created during the admissions application process. It will be created automatically via Inquiry Main and Holding Lookup page submit events.

Custom Control-MSPARM AD100-1-3 controls the stage at which the degree row is created. Many schools use a value of Y (applied) which means the student record is visible at this stage for financial aid etc.. The disadvantage of creating the record early is that the data might change (e.g. change of major) and this has to be manually updated in the degree row. Also, you will end up with more rows in the student finder for students who might not actually enroll.

Below is a screen shot of the degree detail page.



Columns filled during the auto add process include:

Current Degree (RGDEGR/CURRENT_FLAG)
An "X" in this field indicates that this degree is the current degree. An 'X' is only valid with degrees from this institution (School # =0). The major and entering semester from the current degree record is what will be used in registration programs such as degree audits, transcripts, and report programs.

Seq# (RGDEGR/SEQUENCE_NUMBER)
The sequence number indicates the order in which the degree was added. The first degree record will be sequence 0, the second 1, and so on.

Type (RGDEGR/DEGREE_CODE1)
This field contains a code that indicates the type of degree. For example: AS=Associate of Science, BA=Bachelor of Arts, etc. This field will be filled based on the degree specified in the major table.

Level (RGDEGR/DEGREE_LEVEL)
This field will be filled based on the level specified in the major table. Examples include: Associates, Bachelors, or Graduate. This field is a key control field in the system. For example, when an enrollment is added for a student, that enrollment adopts this level for that enrollment. On the transcript, all level 1 enrollments will be grouped with the level 1 degree. If the student has a second degree row for level 5 (masters), then all level 5 enrollments would be grouped with that degree on the transcript. The degree audit is also separated by level. Degree level 4 is reserved to hide rows from the transcript and degree audit. This can be used if there are inactive, superfluous, or redundant rows that you may not want to display.

Status (RGDEGR/DEGREE_STATUS)
This field indicates the ***current*** status of the student.
A status of ‘’ (blank) means the degree row has been auto created from admissions and the student has not been enrolled in any classes yet.
A status of ‘E’ means the student is enrolled in at least one class without a final grade. The system will automatically change the status from blank or ‘A’ to ‘E’ when a student is enrolled in a class.
A status of ‘A’ means the student is active but not currently enrolled in a class. (All non-lab enrollments have been graded). The system will automatically change the status from ‘E’ to ‘A’ when all grades have been entered if they are already an ‘E’, ‘A’, or blank. No other status would be changed in this scenario.
A status of ‘L’ means the student is on Leave of Absence.
A status of ‘W’ means the student has withdrawn.
A status of ‘C’ means the student has completed the program, but has not yet graduated.
A status of ‘Y’ means the student has had their degree conferred on the granted date.
A status of ‘I’ means the degree row is inactive. This is a used in case a student changes programs within the same degree level. The former row is marked Inactive rather than withdrawn because the student did not technically withdraw. If a student withdraws from a program and then comes back later to the same program, then the old degree row should have W in the status. You may also want to change the level of an inactive degree row to 4 so it does not print on the transcript.

The degree granted date will not print on the transcript unless the degree status is ‘Y’. These are the only recommended statuses for the current status. This field is used in Clearinghouse reporting and other reports as a general indicator.

This field should not be confused with the status history table described below. The status history table is used for more specific statuses and dates. For example, a student may go on leave of absence and the current degree row will be marked with a L. a record is entered into status history with the start and end date of the leave. The student returns and the current degree row status is manually changed back to E. This reflects a current status of E while the status history remains as a permanent academic historical record.

Status date (RGDEGR/STATUS_DATE) (review dates and inactive status)

This field is used to specify the date for a current status. The system will automatically enter the date if the system changes the status or default to today upon a change of status. Otherwise, the date would typically be changed by the user when a status is changed (e.g. a student withdraws as of a given date. The status is changed to 'W' and that date is entered in the status date field.

General usage notes for status date- If a student graduates, then the status date will typically be the same as the degree granted date. The degree granted date may be different if the degree is actually granted on a later date. If a student withdraws, the status date will be the actual date of withdrawal. In some reports, there is an LDA (last date of attendance). This date is derived from the attendance system as the last date that a student attended.

For non-semester or term based programs where the start date, mid-point date, and end date overrides are used, the end date is typically the expected graduation date and this date may be left alone when a student actually graduates.

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Major1,2,3 (RGDEGR/MAJOR_CODE)

This field contains the major(s) for this degree. If this is the current record, this major is what will be used in registration programs such as degree audits, transcripts, and report programs. This field will be filled in based on the admissions majors during the auto add process. If the degree row is added at the applied stage, then the admissions applied for majors are used. If the degree row is added at the accepted stage, then the admissions accepted majors are used. If the degree row is auto added at the applied stage and then the student is accepted into a different program, the major(s) must be manually updated in the degree row.

Major1 Declared (RGDEGR/MAJOR_DECLARE1)

This user-defined field is used to indicate whether the major listed in Major1 has been declared.

Minor (RGDEGR/MINOR)

This field contains the minor(s) for this degree. Rules for auto insert same as for majors.

Begin Semester (RGDEGR/ENTERING_SEM)
This is the semester that the degree was begun. If this is the current record, this is the entering semester that will be used in registration programs such as degree audits, transcripts, and report programs. This will be defaulted from the admissions entering semester.

Audit Semester (RGDEGR/DEG_AUDIT_SEMESTER)
This semester is used to locate the appropriate catalog semester for the student's degree audit. If this field is blank, then then entering semester will be used. The degree audit semester may not always be the same as the entering semester, and this field gives the administrator flexibility to assign a catalog semester for the degree audit. During the degree row creation process, the degree audit semester will default to the entering semester.

Expected Grad Sem (RGDEGR/EXPECTED_GRAD_SEM)
This is the expected semester of completion or graduation. This field is important for NSLDS (Clearinghouse) reporting where the expected graduation semester is a required field. During automatic creation of the degree row, the expected grad semester will automatically be derived and entered.

The expected grad semester initial calculation is based on the logic outlined below when adding the Degree Record automatically through the admissions system:

The majors table contains a value for years to complete and part time years to complete. The semester dates table contains 8 buckets for Expected Grad Sem For Year 1-8 and these are used together to calculate the expected grad sem.

For example , a student is starting in Fall 2018 (201910) and enrolling in a program that takes 4 years to complete. (this is specified in the majors table). The admissions part time code is blank which means the student is full time. In the semester dates record for the entering semester, The Expected Grad Sem For Year 4 is 202220 (Spring 2022). The value 202220 will be placed in the expected grad semester field.

Student Site (RGDEGR/STUDENT_SITE)

This field is used to specify the site or location for a student. This would typically be used for institutions with multiple sites. The student site is used as a filter in reporting and the finders. Please note that there are other "sites" in the system (example course site, billing site).

Date Overrides

The date override fields should be used for any program that is not strictly semester based. This allows flexibility in specifying start, mid-point, and ending dates for a student. The dates can be changed as students digress from original dates of the term/semester as defined in the semester dates table.

Start Date Override (RGDEGR/START_DATE_OVERRIDE)

If MSPARM DEGREE_OVR 1-1 is set to Y, then this field will be automatically filled in from the value in the Semester Dates Table associated with this degree row.

Enrollment Verification Override (RGDEGR/ENROLLMENT_VERIFICATION_DATE)

This field is used for mid-point date. If MSPARM DEGREE_OVR 1-1 is set to Y, then this field will be automatically filled in from the value in the Semester Dates Table associated with this degree row.

End Date Override (RGDEGR/END_DATE_OVERRIDE)

If MSPARM DEGREE_OVR 1-1 is set to Y, then this field will be automatically filled in from the value in the Semester Dates Table associated with this degree row.

Other fields that can be manually entered or changed include:

School (RGDEGR/SCHOOL_CODE)
This field contains the CEEB code for the school from which the degree was received. Internal Degree indicates the degree is from your institution.

Date Granted (RGDEGR/DEGREE_GRANTED_DATE)

This contains the date that the degree was actually granted and also appears on the transcript.

Class (RGDEGR/CLASS_OF)
This field displays the class of for the student for this degree.

Transcript Footnote Code (RGDEGR/FOOTNOTE_CODE)
This dropdown is used to specify a pre-built bulleted footnote that will appear on the transcript. There is a user interface on the client registration menu to enter the bulleted footnotes.

Program Accept Date (RGDEGR/PROGRAM_ACCDEPT_DATE)

This field is used to specify the date that the student accepts a pogram/major.

Alumni Use (RGDEGR/ALUMNI_DEV_PREF_REC)

This field is used to specify a preferred class of for an alumni with multiple degrees.

Status History Table

The status history table is used to store historical academic record information. Examples would be leave of absence, dean's list, honors, probation, other notations about the student's academic record. A header table exists that allows creation of status history codes and associated attributes. For example, you might create a status code of PR (probation), but you do not want it to appear on the transcript. The status header will allow you to specify whether the code appears or not.

The status history table can also be used to add additional information about a withdrawal. For example, a student might withdraw and the current degree row status is set to W with a date for the withdrawal. In the status history table, there are additional codes set up like WA (withdrawal academic), WF(withdrawal financial), WD(withdrawal disciplinary), and other codes as needed. This data should be considered informational only for the academic record and the transcript, but is generally not used in Campus Café reporting.

Batch add to Status History Table

The status history table can be updated through the student finder. After you have selected a group of students, there is a +Status function that will allow selection of a code, semester, level, start and end date. Records added through this function are also added to the audit log. This means you can use the database trigger function to automatically create activity tracking records for the batch. Those records can contain a work flow that sends notification to the student, advisor, and other emails specified.

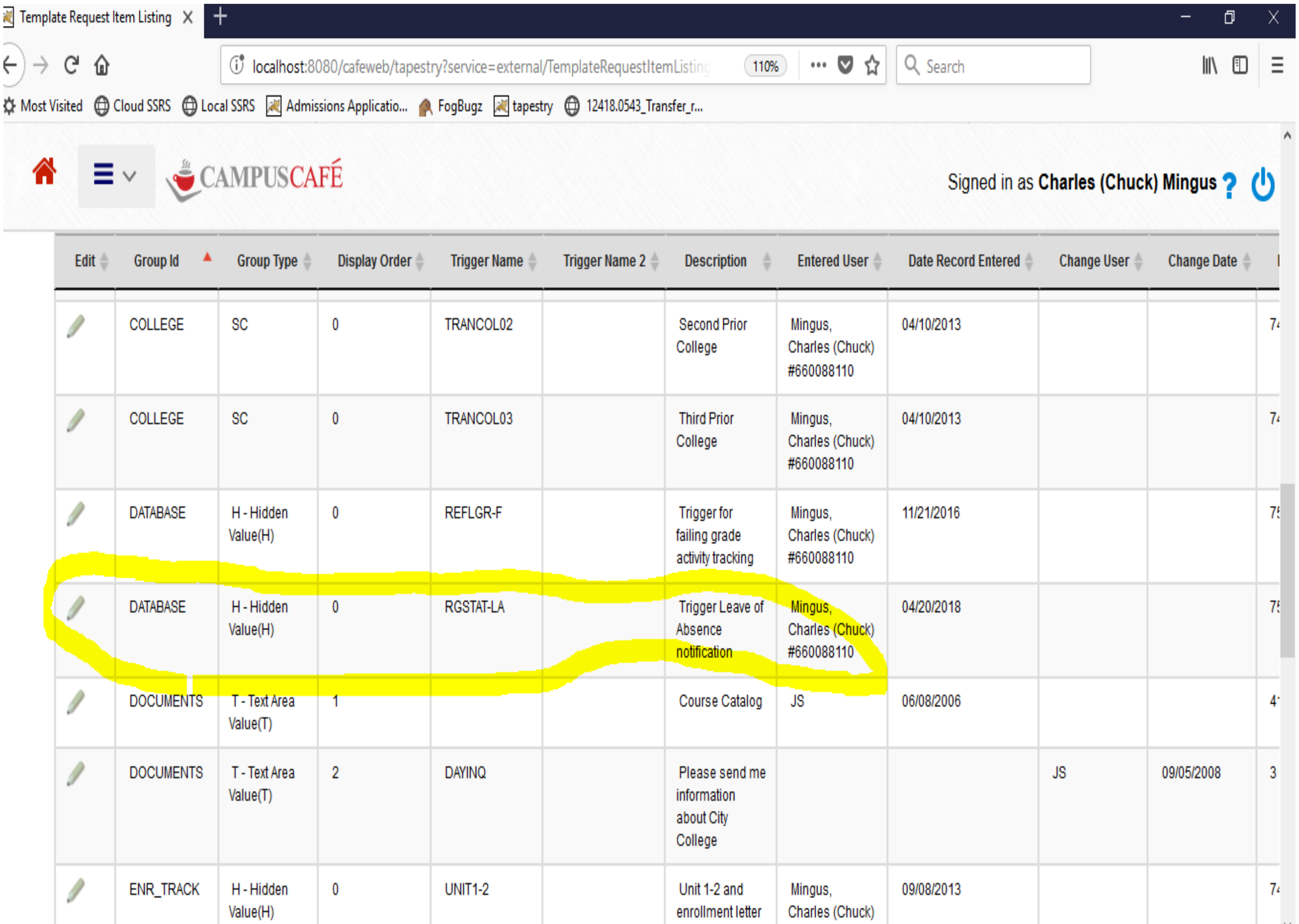
Triggering Activity Tracking from Status History Rows

There are often cases where an administrator wants to create an automated notification when an event occurs, such as a change to a student's status history. For example, the financial aid office needs to be notified when a student withdraws or goes on leave of absence. Example 2, various offices want to be notified when a student files for graduation. Following is an example of a student going on Leave of Absence and the Financial Aid office is notified.

As with all triggered activity tracking, you must have the three basic elements:

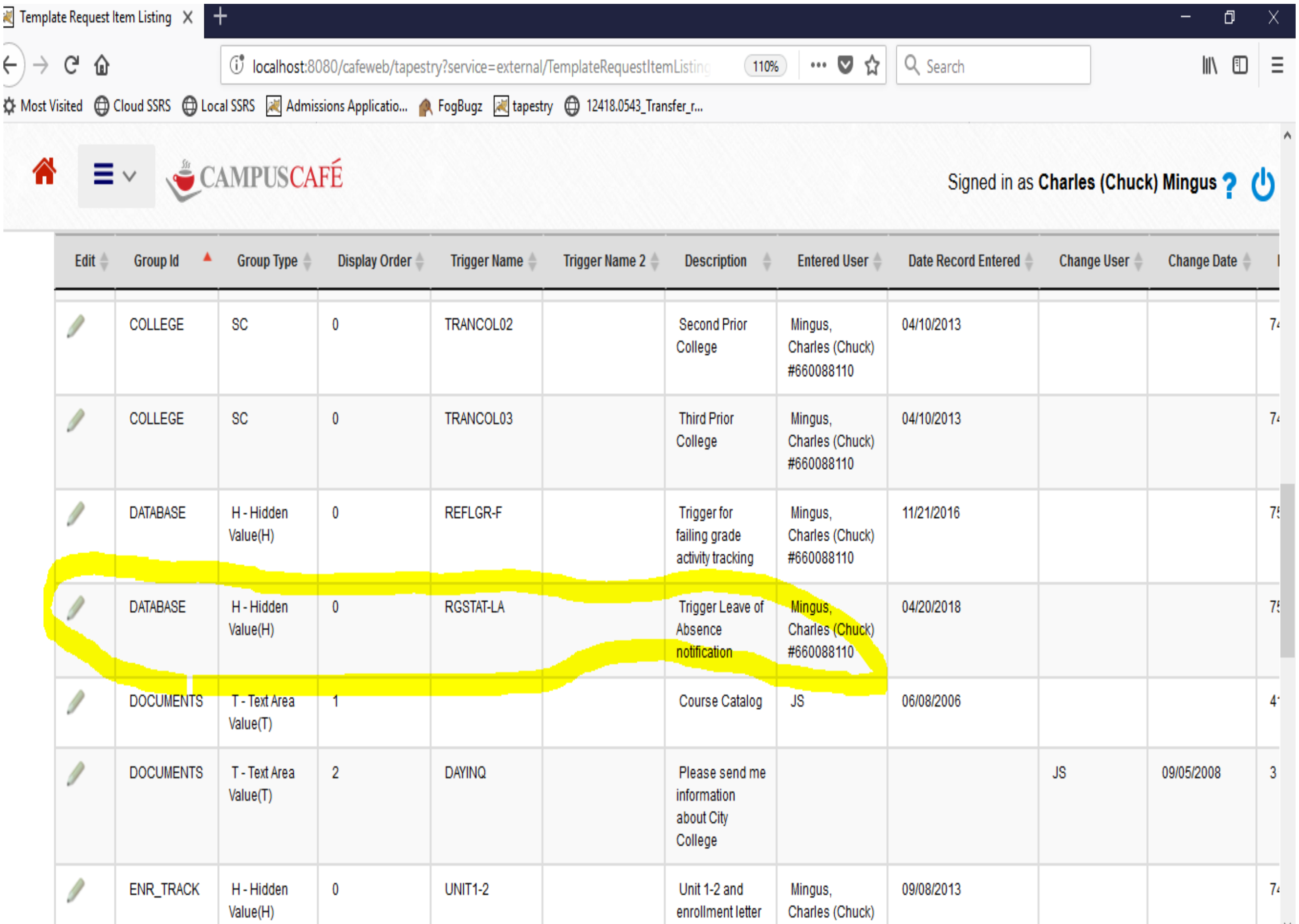
- A trigger
- An activity tracking template with that trigger
- A work flow in the activity tracking template with the details of the notification (who will receive it, what does it contain, when will it get sent).

Database trigger:

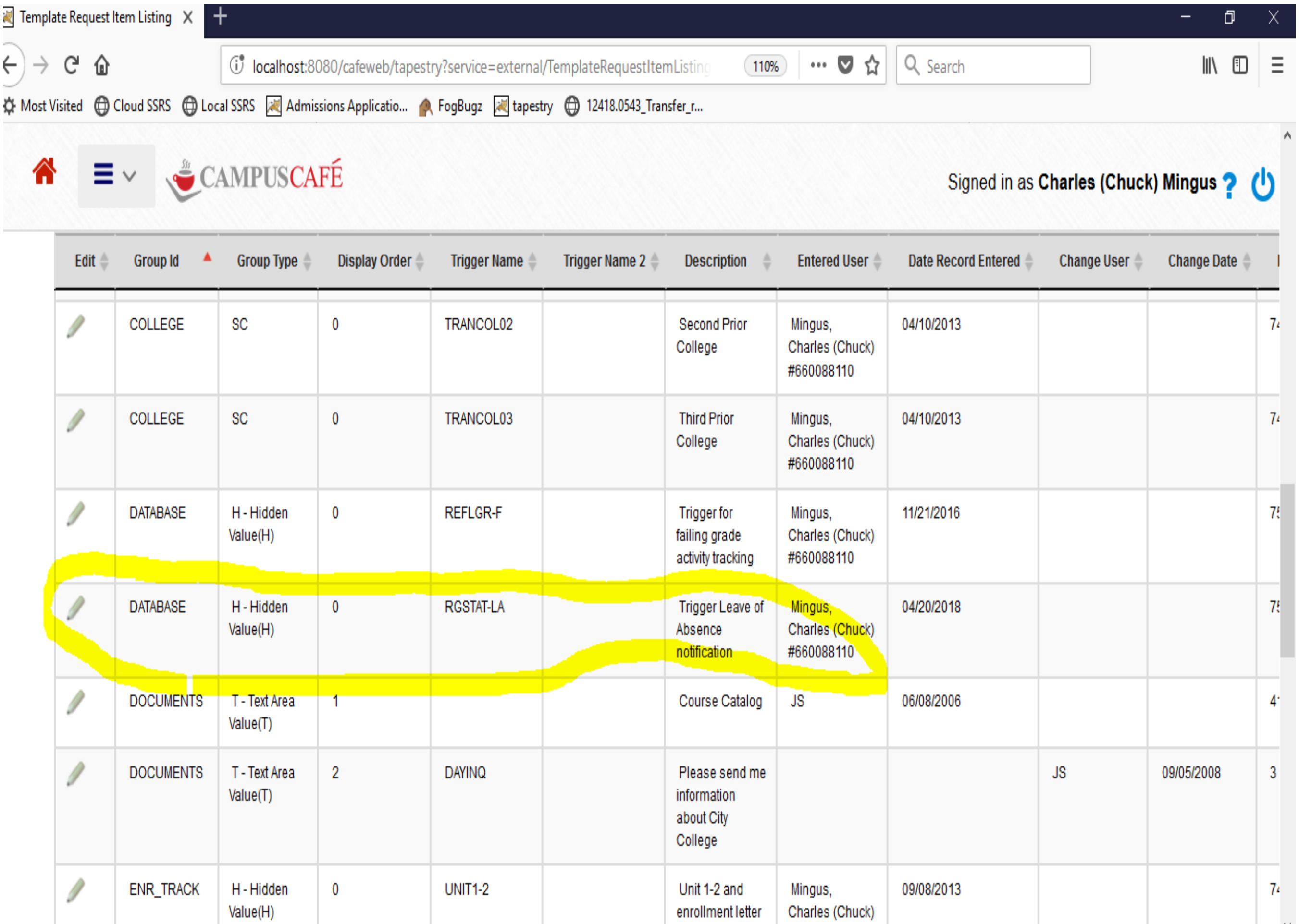


Edit	Group Id	Group Type	Display Order	Trigger Name	Trigger Name 2	Description	Entered User	Date Record Entered	Change User	Change Date	
	COLLEGE	SC	0	TRANCOL02		Second Prior College	Mingus, Charles (Chuck) #660088110	04/10/2013			74
	COLLEGE	SC	0	TRANCOL03		Third Prior College	Mingus, Charles (Chuck) #660088110	04/10/2013			74
	DATABASE	H - Hidden Value(H)	0	REFLGR-F		Trigger for failing grade activity tracking	Mingus, Charles (Chuck) #660088110	11/21/2016			75
	DATABASE	H - Hidden Value(H)	0	RGSTAT-LA		Trigger Leave of Absence notification	Mingus, Charles (Chuck) #660088110	04/20/2018			75
	DOCUMENTS	T - Text Area Value(T)	1			Course Catalog	JS	06/08/2006			4
	DOCUMENTS	T - Text Area Value(T)	2	DAYINQ		Please send me information about City College			JS	09/05/2008	3
	ENR_TRACK	H - Hidden Value(H)	0	UNIT1-2		Unit 1-2 and enrollment letter	Mingus, Charles (Chuck)	09/08/2013			74

Activity Tracking Template with database trigger:



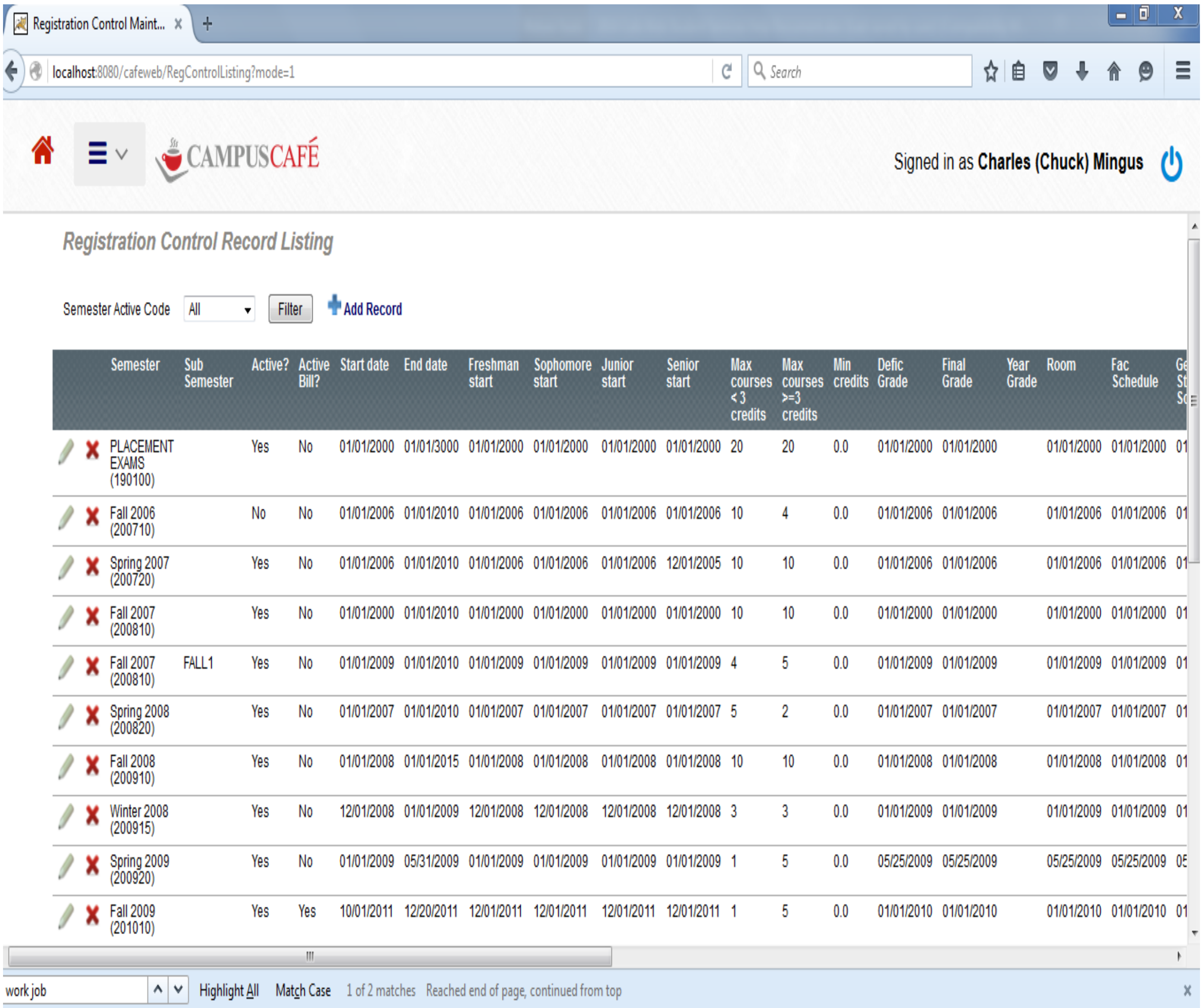
Work Flow with notification specifics:



Edit	Group Id	Group Type	Display Order	Trigger Name	Trigger Name 2	Description	Entered User	Date Record Entered	Change User	Change Date	
	COLLEGE	SC	0	TRANCOL02		Second Prior College	Mingus, Charles (Chuck) #660088110	04/10/2013			7
	COLLEGE	SC	0	TRANCOL03		Third Prior College	Mingus, Charles (Chuck) #660088110	04/10/2013			7
	DATABASE	H - Hidden Value(H)	0	REFLGR-F		Trigger for failing grade activity tracking	Mingus, Charles (Chuck) #660088110	11/21/2016			7
	DATABASE	H - Hidden Value(H)	0	RGSTAT-LA		Trigger Leave of Absence notification	Mingus, Charles (Chuck) #660088110	04/20/2018			7
	DOCUMENTS	T - Text Area Value(T)	1			Course Catalog	JS	06/08/2006			4
	DOCUMENTS	T - Text Area Value(T)	2	DAYINQ		Please send me information about City College			JS	09/05/2008	3
	ENR_TRACK	H - Hidden Value(H)	0	UNIT1-2		Unit 1-2 and enrollment letter	Mingus, Charles (Chuck)	09/08/2013			7

In this example, a work flow will be created whenever a Status History record with a value of LA is added because of the trigger. The work flow specifies that financialaid@cityuniversity.edu will get an email whenever this work flow is added. The advisor will also get an email because the email advisor box is checked. Additional people could be added to be notified if desired. (i.e. comma separated list of email recipients).

Registration Control



Semester	Sub Semester	Active?	Active Bill?	Start date	End date	Freshman start	Sophomore start	Junior start	Senior start	Max courses < 3 credits	Max courses >=3 credits	Min credits	Defic Grade	Final Grade	Year Grade	Room	Fac Schedule	Ge St Sc
PLACEMENT EXAMS (190100)		Yes	No	01/01/2000	01/01/3000	01/01/2000	01/01/2000	01/01/2000	01/01/2000	20	20	0.0	01/01/2000	01/01/2000		01/01/2000	01/01/2000	01
Fall 2006 (200710)		No	No	01/01/2006	01/01/2010	01/01/2006	01/01/2006	01/01/2006	01/01/2006	10	4	0.0	01/01/2006	01/01/2006		01/01/2006	01/01/2006	01
Spring 2007 (200720)		Yes	No	01/01/2006	01/01/2010	01/01/2006	01/01/2006	01/01/2006	12/01/2005	10	10	0.0	01/01/2006	01/01/2006		01/01/2006	01/01/2006	01
Fall 2007 (200810)		Yes	No	01/01/2000	01/01/2010	01/01/2000	01/01/2000	01/01/2000	01/01/2000	10	10	0.0	01/01/2000	01/01/2000		01/01/2000	01/01/2000	01
Fall 2007 (200810)	FALL1	Yes	No	01/01/2009	01/01/2010	01/01/2009	01/01/2009	01/01/2009	01/01/2009	4	5	0.0	01/01/2009	01/01/2009		01/01/2009	01/01/2009	01
Spring 2008 (200820)		Yes	No	01/01/2007	01/01/2010	01/01/2007	01/01/2007	01/01/2007	01/01/2007	5	2	0.0	01/01/2007	01/01/2007		01/01/2007	01/01/2007	01
Fall 2008 (200910)		Yes	No	01/01/2008	01/01/2015	01/01/2008	01/01/2008	01/01/2008	01/01/2008	10	10	0.0	01/01/2008	01/01/2008		01/01/2008	01/01/2008	01
Winter 2008 (200915)		Yes	No	12/01/2008	01/01/2009	12/01/2008	12/01/2008	12/01/2008	12/01/2008	3	3	0.0	01/01/2009	01/01/2009		01/01/2009	01/01/2009	01
Spring 2009 (200920)		Yes	No	01/01/2009	05/31/2009	01/01/2009	01/01/2009	01/01/2009	01/01/2009	1	5	0.0	05/25/2009	05/25/2009		05/25/2009	05/25/2009	05
Fall 2009 (201010)		Yes	Yes	10/01/2011	12/20/2011	12/01/2011	12/01/2011	12/01/2011	12/01/2011	1	5	0.0	01/01/2010	01/01/2010		01/01/2010	01/01/2010	01

The filter drop down can be used to list active semesters, inactive semesters, or all semestters.

Start Date: This holds the default start date for registration for the semester. ***Please note: this is not the start date for the semester, and is the start date for registration within the semester.*** The start and end dates for the semester are found in the semester dates table.

When a student is approved for registration this date is imbedded in the student permission record. If this date is changed after the student is approved, the student permission record must also be changed if you wish to have the default date recorded in the student permission record.

End Date: This holds the default end date for registration for the semester. When a student is approved for registration this date is imbedded in the student permission record. If this date is changed after the student is approved, the student permission record must also be changed.

Freshman Start Date: This holds the default start date for freshman registration for the semester. A freshman is a student whose class level=1. If this value is not left at the default, when a freshman is approved for registration this date is imbedded in the student permission record. If this date is changed after the student is approved, the student permission record must also be changed.

Sophomore Start Date: This holds the default start date for sophomore registration for the semester. A sophomore is a student whose class level=2. If this value is not left at the default, when a sophomore is approved for registration this date is imbedded in the student permission record. If this date is changed after the student is approved, the student permission record must also be changed.

Junior Start Date: This holds the default start date for junior registration for the semester. A junior is a student whose class level=3. If this value is not left at the default, when a junior is approved for registration this date is imbedded in the student permission record. If this date is changed after the student is approved, the student permission record must also be changed.

Senior Start Date: This holds the default start date for senior registration for the semester. A senior is a student whose class level=4. If this value is not left at the default, when a senior is approved for registration this date is imbedded in the student permission record. If this date is changed after the student is approved, the student permission record must also be changed.

Max Courses Less Than 3 Credits: This field holds the maximum number of courses a student may enroll in that are less than 3 credits. If a student tries to register for more than this number of under 3 credit courses an error message will appear.

Max Courses Greater than/equal to 3 credits: This field holds the maximum number of courses a student may enroll in that are 3 credits or more. If a student tries to register for more than this number of 3+ credit courses an error message will appear.

Minimum Required Credits: This field holds the minimum credits a student must be enrolled in during the semester. If not set to 0, students will get an error when they attempt to drop course that brings them under this level.

Maximum Credits this semester: This field holds the maximum credits a student can be enrolled in during the semester. This field is generally set to 99.0 as a default.

Comment: This field holds a comment for the semester.

Deficiency Grade View Date: This field contains the date when deficiency grades can be viewed.

Final Grade View Date: This field contains the date when final grades can be viewed. Prior to this date grades will appear as IP (In Progress) on Transcripts, Degree Audits, and Class schedules/grades.

Room View Date: This field contains the date when rooms will appear on Class schedules/grades, course listings and faculty schedule.

Faculty Schedule View Date: This field contains the date when faculty members can see their schedule in Cafeweb. Be sure to add the registration control record and set this date prior to copying the schedule for future semesters. If the record for the semester does not exist and the courses are copied, faculty will be able to view their schedule.

Student Schedule View Date: This field contains the default date for students to view their schedules.

Student Schedule Freshman Override View Date: This field contains the date for freshman to view their schedules. A freshman is a student whose class level=1. If the default value is left in this field the Student Schedule View Date will be used.

Student Schedule Sophomore Override View Date: This field contains the date for sophomores to view their schedules. A sophomore is a student whose class level=2. If the default value is left in this field the Student Schedule View Date will be used.

Student Schedule Junior Override View Date: This field contains the date for juniors to view their schedules. A junior is a student whose class level=1. If the default value is left in this field the Student Schedule View Date will be used.

Student Schedule Senior Override View Date: This field contains the date for seniors to view their schedules. A senior is a student whose class level=1. If the default value is left in this field the Student Schedule View Date will be used.

Mid-Term Grade Restriction: This field contains the Mid-Term Grade Restriction Code, which is used to restrict the locking of comments based upon the parameter entered here. Allowable parameters are A=Allowed; R=Required, N=Not Allowed. If Not Allowed, the Mid-Term Grade field will not be shown on the course roster screen. If Mid-Term grade is required, the submit-lock of the comments will confirm that the grade is entered before comments are permitted to be locked.

Mid-Term Comment Restriction: This field contains the Mid-Term Comment Restriction Code, which is used to restrict the locking of comments based upon the parameter entered here. Allowable parameters are A=Allowed; R=Required, N=Not Allowed. If Not Allowed, the Mid-Term Comment field will not be shown on the course roster screen. If Mid-Term Comment is required, the submit-lock of the comments will confirm that a comment is entered for each record before comments are permitted to be locked.

Final Grade Restriction: This field contains the Final Grade Restriction Code, which is used to restrict the locking of comments based upon the parameter entered here. Allowable parameters are A=Allowed; R=Required, N=Not Allowed. If Not Allowed, the Final Grade field will not be shown on the course roster screen. If Final grade is required, the submit-lock of the comments will confirm that the grade is entered before comments are permitted to be locked.

Final Comment Restriction: This field contains the Final Comment Restriction Code, which is used to restrict the locking of comments based upon the parameter entered here. Allowable parameters are A=Allowed; R=Required, N=Not Allowed. If Not Allowed, the Final Comment field will not be shown on the course roster screen. If Final Comment is required, the submit-lock of the comments will confirm that a comment is entered for each record before comments are permitted to be locked.

Year Grade Restriction: This field contains the Year Grade Restriction Code, which is used to restrict the locking of comments based upon the parameter entered here. Allowable parameters are A=Allowed; R=Required, N=Not Allowed. If Not Allowed, the Mid-Term Grade field will not be shown on the course roster screen. If Year grade is required, the submit-lock of the comments will confirm that the grade is entered before comments are permitted to be locked.

Year Comment Restriction: This field contains the Year Comment Restriction Code, which is used to restrict the locking of comments based upon the parameter entered here. Allowable parameters are A=Allowed; R=Required, N=Not Allowed. If Not Allowed, the Year Comment field will not be shown on the course roster screen. If Year Comment is required, the submit-lock of the comments will confirm that a comment is entered for each record before comments are permitted to be locked.

Semester Active: This field controls which semesters are available in the semester drop downs. If a user does not have No Access Restriction placed upon 670 in the global module, all semesters are available regardless if they are active. In the student module if No Access is assigned to restriction 669, this will also control pick semester there as well.

Semester Billing Active: Billing on the web application will only occur for semesters with this flag checked.

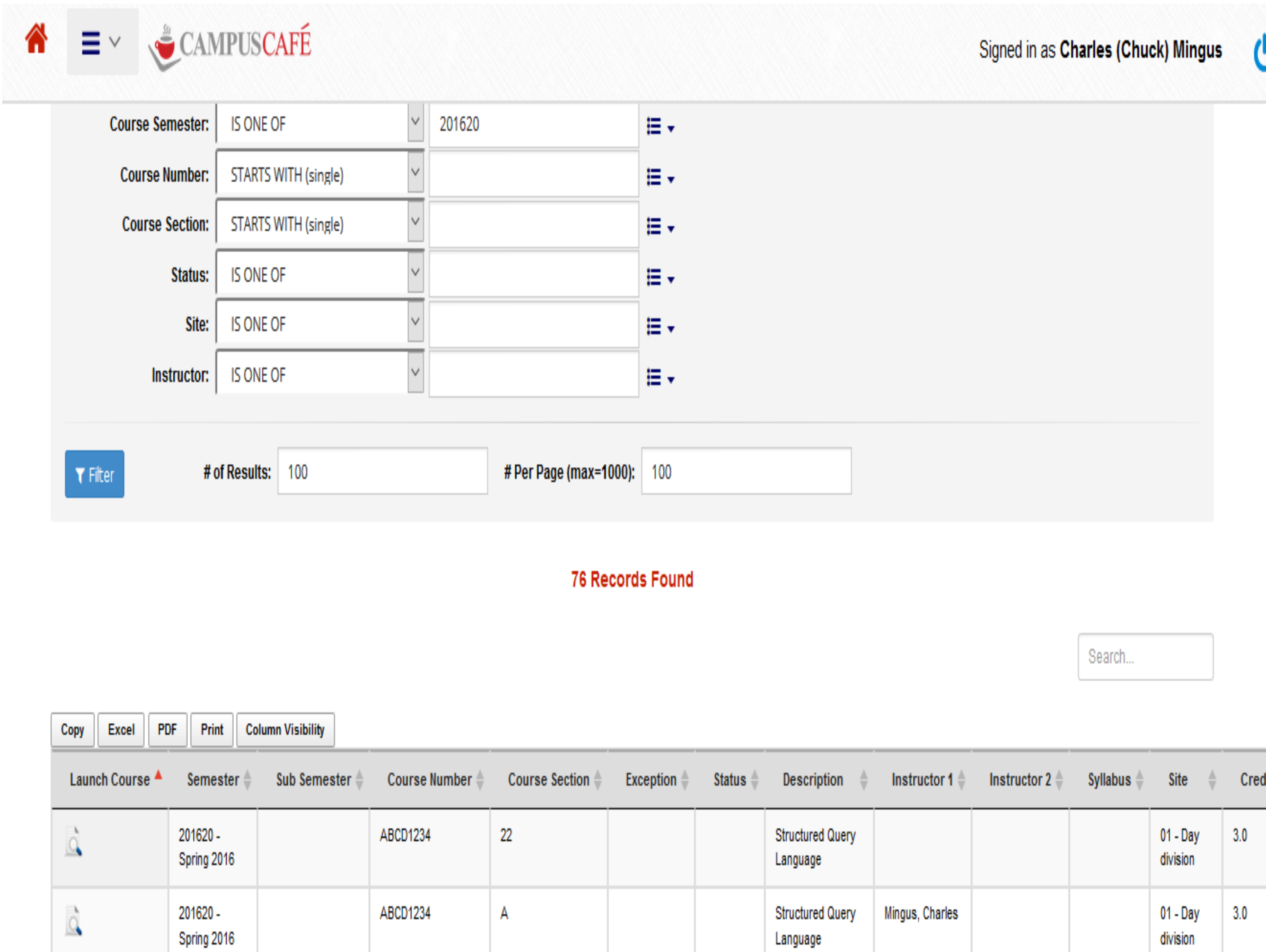
Allow Advisor Approval: If this box is checked advisors have the ability to approve students for registration for this semester. The pick semester drop down in the advisor listing will only include semesters for which this box is checked provided No Access Restriction is not placed upon 669 in the advisor module.

Field Placement Active: This flag must be checked to allow administrative access to a placement term. This does not apply to student's registration ability which is tied to the semester active flag.

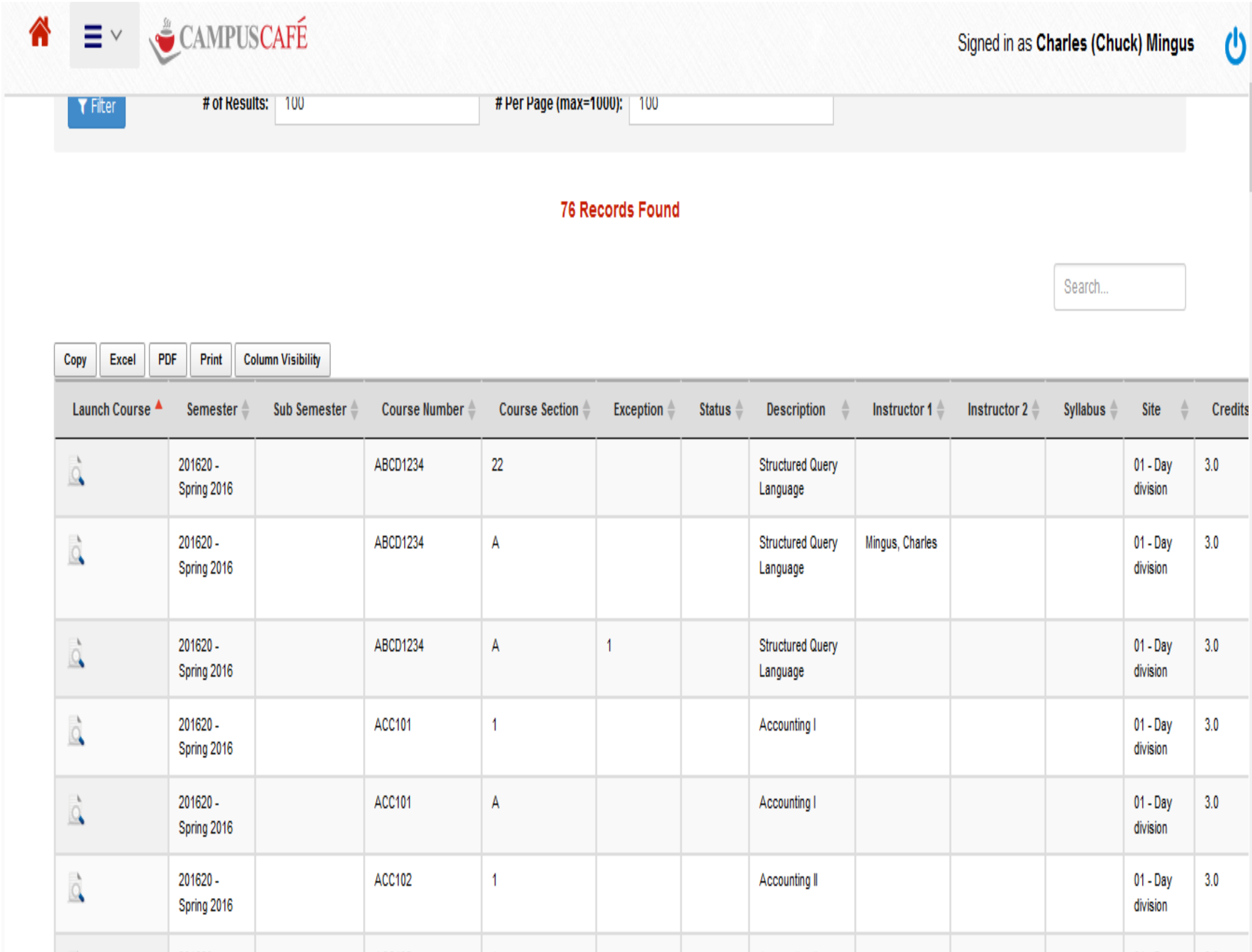
Course Finder-Adding Courses

The below page is used for the following functions:

- Search for courses
- Add, update, delete courses
- Copy courses from one term to another

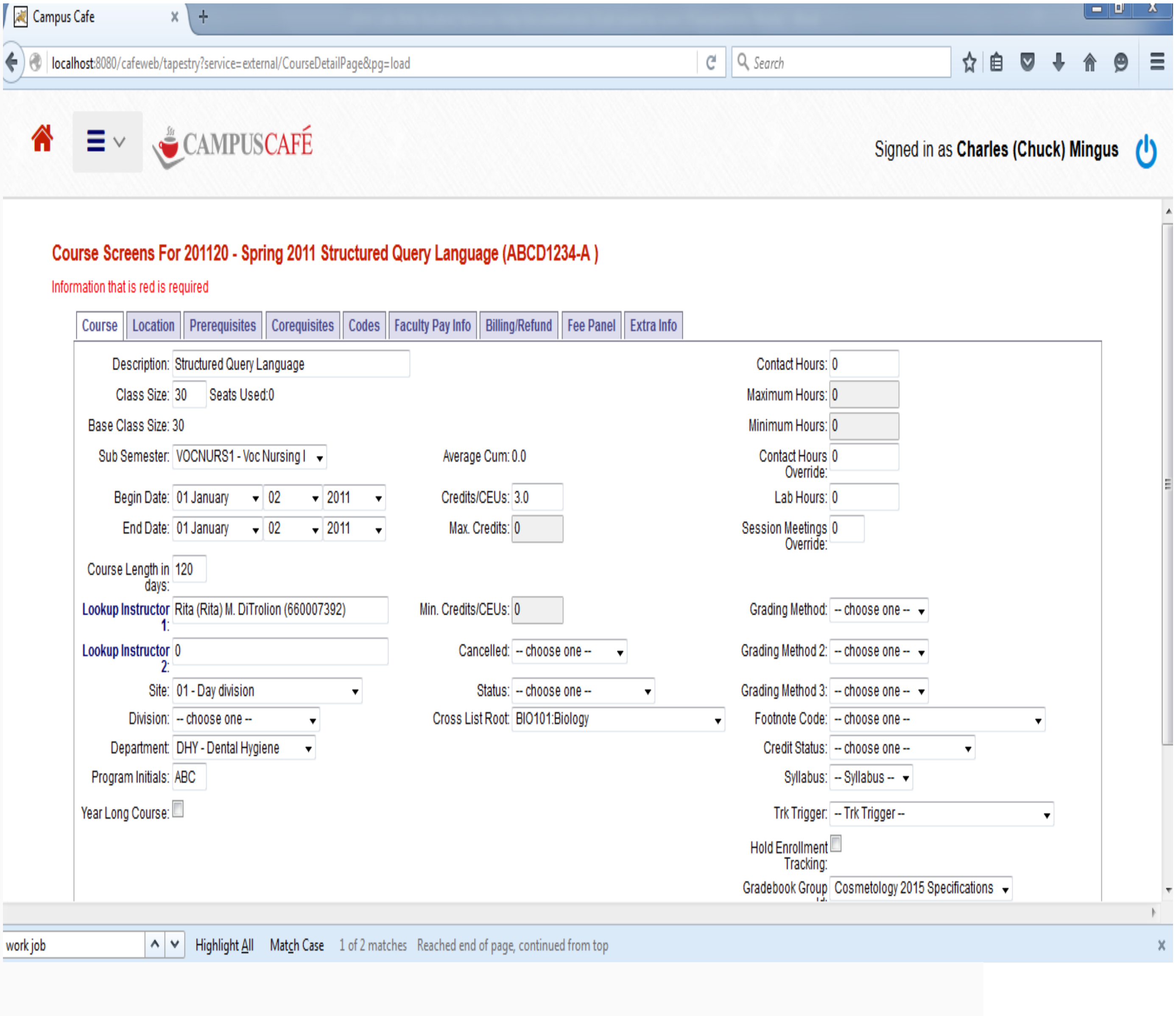


The below page contains a sortable grid that allows access to the course entry/update page and associated tabs.



Launch Course	Semester	Sub Semester	Course Number	Course Section	Exception	Status	Description	Instructor 1	Instructor 2	Syllabus	Site	Credits
	201620 - Spring 2016		ABCD1234	22			Structured Query Language				01 - Day division	3.0
	201620 - Spring 2016		ABCD1234	A			Structured Query Language	Mingus, Charles			01 - Day division	3.0
	201620 - Spring 2016		ABCD1234	A	1		Structured Query Language				01 - Day division	3.0
	201620 - Spring 2016		ACC101	1			Accounting I				01 - Day division	3.0
	201620 - Spring 2016		ACC101	A			Accounting I				01 - Day division	3.0
	201620 - Spring 2016		ACC102	1			Accounting II				01 - Day division	3.0

The below page contains all detail tabs for adding course data and functions.



Course fields and functions

Description- This field appears on the transcript as the official title of the course. If more than 30 characters are used and the “two up” or two column transcript is used, then the title will be wrapped onto a second line.

Class Size- This field contains the number of seats in the class. This can be overridden during on-line registration and this field will increase if that happens. Other registration options such as wait listing will not affect the class size field.

Base Class Size- This field will retain the original class size in case the class size is increased during registration.

Sub-Semester- The sub-semester is an attribute of the course and not part of key to the course. It is typically used to control registration and grade entry. For example, in the fall term 201710, there is a sub-semester that runs from September 1 to October 15 (term 1) and another sub-semester that runs from October 16 until December 1 (term 2). By setting up these sub-semesters, you can control when student can register for classes (Registration Control table on registrar menu) and when faculty can enter grades for each sub semester (Grade Control table on registrar menu).

Begin and End Date- These fields are used to define the class period. If these fields are left blank, the semester dates table would then define the start and end date (i.e. the courses start and end with the term. However, many schools have individual start and end dates for courses that are not coincidental with the term dates, and thus these can be considered overrides. Campus Café supports asynchronous courses and the student enrollment record can have a further override of the start and end date in this case.

Course Length in Days- This field can contain the actual number of days of the course. If used, this field will be used to calculate the end date for a student in asynchronous mode and is calculated from the individual student's start date.

Instructor 1 and 2.- Up to two instructors can be specified for a course. However, if there are more than two, an exception row or rows can be added to the course file with an additional two instructors per exception row.

Site- This field contains the course site. This can be used for a physical site or a virtual site. For example, you may have site 1 as Day, site 2 as evening, and site 3 as on-line. Using custom control WEBREGSITE, you can constrain students to only see their courses during on-line registration (e.g. site 1 day students would only see site 1 courses).

Division- This field will contain the school division (example- MED = Medical School, LIB – Liberal Arts College. This field is available on the course listing and rosters as a filter.

Department- This field will contain the school department (example- ACC = Accounting, NUR = Nursing. This field is available on the course listing and rosters as a filter. It is also used in the permissions system to govern departmental access to rosters and students. A faculty or administrator can be designated as belonging to a department (faculty maintenance) or multiple departments (multiple department maintenance function on the Campus Café Client).

Program Initials - This field will contain the first two or three characters of the course number. (example- AC = or ACC for accounting courses based on customer control WEBCRPLEN. It is available as a filter on the course listings.

Year Long Course- Course described as year long will allow the year long grade to be entered.

Average Cum- Not currently in use.

Credits/CEUs- This field will contain the default credits or CEUs for the course. This is copied to the student enrollment record can be overridden on an individual student enrollment. The field is used in GPA calculations, degree audits, credit totals, and searches.

Max Credits- This will define the maximum credits that can be assigned to an enrollment.

Min Credits/CEUs- This will define the minimum credits that can be assigned to an enrollment.

Cancelled – This flag can be used to cancel a course. This will prevent further registration although there may already be enrollments in the course when it is canceled. The multi-drop function on the client can be used to unenroll students from canceled courses.

Status- This field can contain values “closed” or “allow over-enrollment”. If closed, registration will be unavailable without proper override. For example, some schools will temporarily close a course to save space for a preferred group that might register a week later. Allow over-enrollment will allow registration to continue even if a course is full without affecting the base class size.

Cross List Root- Campus Café supports cross listing of courses. This means you can have several courses listed in different departments, that all appear on the same roster for grading and teaching purposes. The seat count for the consolidatioin will be contained in the root course. Thus, any “satellite” courses must contain the cross list root course name.

Contact Hours- This field will contain the contact hours for the course. This would be mandatory in a clock hour model and can also be filled in for credit courses. If only the contact hours are filled in and not the credits, the contact hours will be used for GPA calculations etc.

Maximum and Minimum Hours- used like credit hour maximum and minimum described above.

Contact Hours Override- Not currently used.

Lab Hours- This field will contain the hours for labs or skills that are separate from the academic teaching. There are options on the grade report/transcript to calculate separate grade averages for lab/skills achievement.
Session Meeting Override- Not currently used.

Grading Method- These fields are used to describe grading method(s). Example would be pass fail.

Footnote Code- This field can contain a footnote that will appear on the transcript for the specific course.

Credit Status- Non-Credit courses can be specified with this field.

Syllabus- This field will link to the syllabus table that contains a list of the lessons, tests, quizzes that are associated with the course.

Trk Trigger- This trigger can be used to generate activity tracking records when an enrollment is added to a student subject to the hold enrollment tracking field.

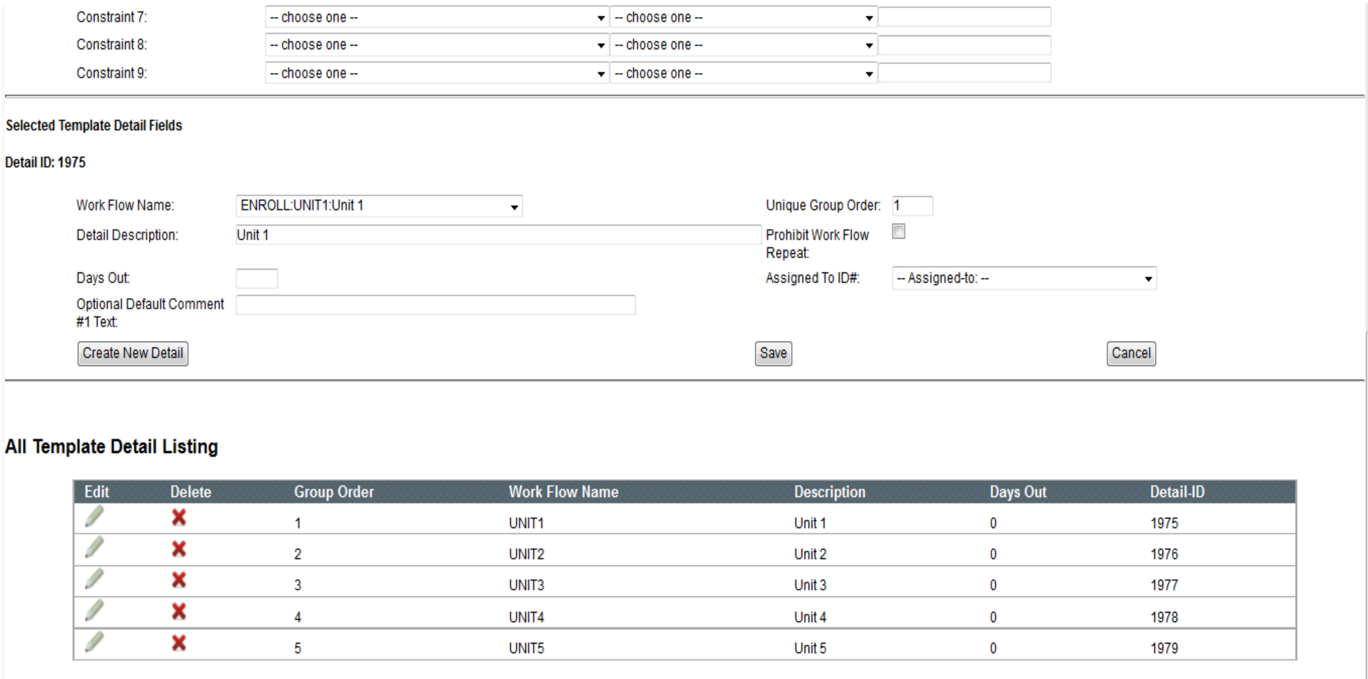
Hold Enrollment Tracking- If this box is checked, then the activity tracking will not be generated for this course for the student until the hold enrollment tracking box is unchecked on the student enrollment record.

Gradebook group ID- This field will contain the ID of the gradebook group for the course. When the course is added to a student's record, a gradebook will be generated for that student based on the records set up in the gradebook maintenance on the registrar menu.

Adding a trigger for activity tracking gradable units

This trigger is used to create activity tracking units specific to an enrollment. While an activity tracking record can be used to track a grade, this should not be confused with the Campus Café gradebook module described below.

In the above page example, a trigger has been added in the Trk Trigger field and the hold enrollment tracking box is checked. This trigger corresponds to an activity tracking template that contains the units to be create for this course. Different templates can have different combinations of units and thus can be used to create the appropriate units for a given course. A sample of the activity tracking template is below.



Constraint 7: -- choose one -- -- choose one --

Constraint 8: -- choose one -- -- choose one --

Constraint 9: -- choose one -- -- choose one --

Selected Template Detail Fields

Detail ID: 1975

Work Flow Name: ENROLL:UNIT1:Unit 1

Unique Group Order: 1

Detail Description: Unit 1

Prohibit Work Flow Repeat:

Days Out:

Assigned To ID#: -- Assigned-to: --

Optional Default Comment #1 Text:

Create New Detail Save Cancel

All Template Detail Listing

Edit	Delete	Group Order	Work Flow Name	Description	Days Out	Detail-ID
		1	UNIT1	Unit 1	0	1975
		2	UNIT2	Unit 2	0	1976
		3	UNIT3	Unit 3	0	1977
		4	UNIT4	Unit 4	0	1978
		5	UNIT5	Unit 5	0	1979

Because the hold enrollment tracking box is checked, the units will not be triggered until the hold enrollment tracking box is unchecked on the individual enrollment record.

Gradebook Module

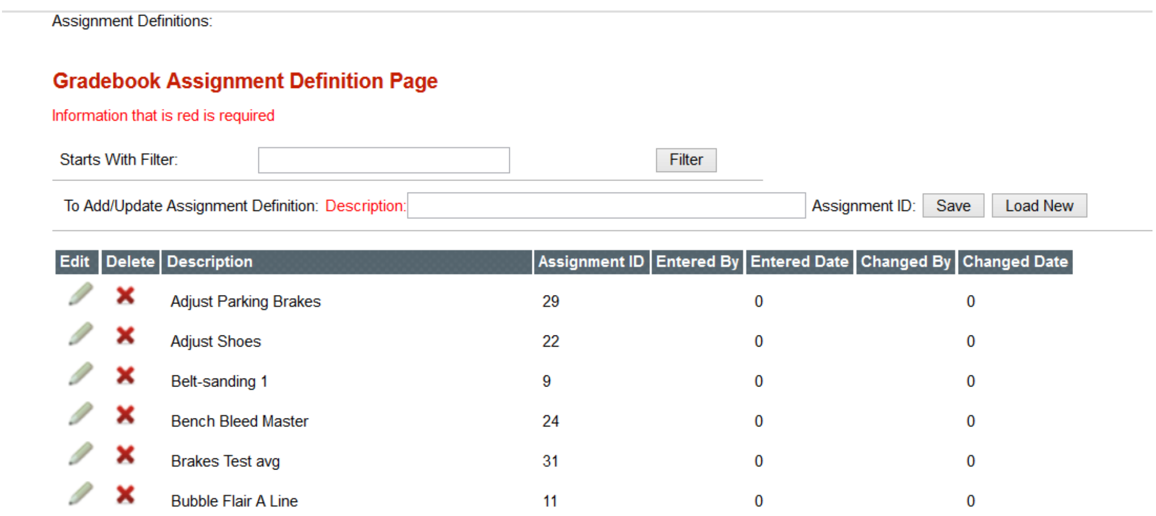
The gradebook module in Campus Café consists of several interfaces.

- Assignment Definition- This allows for creation of reusable assignment descriptions
- Gradebook Group- This allows the creation of a reusable gradebook group. The group defines parameters that determine how the group should function (i.e. how grades will be calculated.
- Gradebook Group and Assignment Definition. This is a list of the assignments that will be added to a student's record when they enroll in a class that triggers a gradebook. The trigger is indicated on the course detail page in a dropdown. In general, assignments are set up with objectives and sub-objectives to mimic a course syllabus. For example, an objective would be academic and the sub-objective would be homework, quizzes, tests. Another objective might be skills.

Once a student is enrolled in a course that contains a trigger for gradebook assignments, the roster will allow the instructor to enter individual earned "points" for those assignments. The system will calculate the final grade based on the parameters that are set up in the gradebook group.

The final grade and the objective/sub-objective grades can be found on the enrollment history interface.

Gradebook Assignment Definition Page


Assignment Definitions:

Gradebook Assignment Definition Page

Information that is red is required

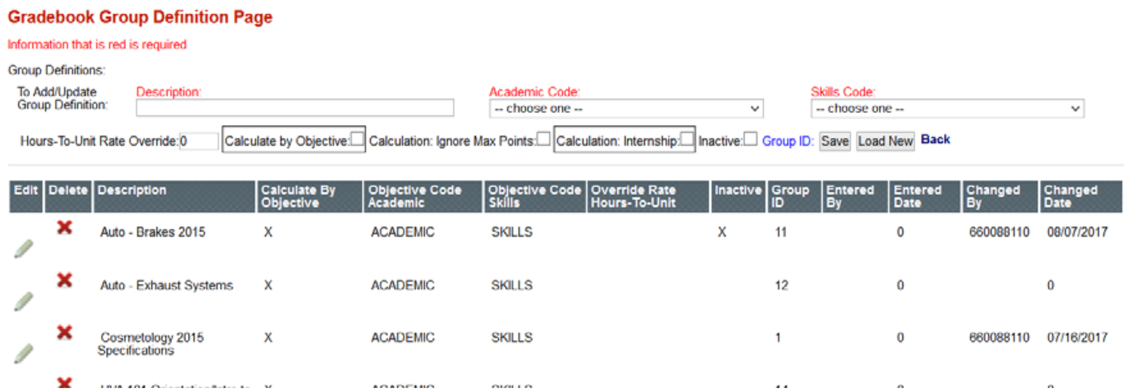
Starts With Filter: Filter

To Add/Update Assignment Definition: Description: Assignment ID: Save Load New

Edit	Delete	Description	Assignment ID	Entered By	Entered Date	Changed By	Changed Date
		Adjust Parking Brakes	29		0		0
		Adjust Shoes	22		0		0
		Belt-sanding 1	9		0		0
		Bench Bleed Master	24		0		0
		Brakes Test avg	31		0		0
		Bubble Flair A Line	11		0		0

Group Definition Listing and Setup Page (below)

In order to use the weighting one must assign an objective to the Academic Code and the Skills Code (even if not actually adding any assignments to particular objective). Also one must check the Calculate By Objective checkbox. This instructs the Assignment Calculator to sort and weight the group's assignments by objective then sub-objective before calculating an earned points average on the Academic objective. To add a new Group Definition use the Load New button. To edit and existing Group Definition click the pencil icon beside group row in the grid then click Save button to save your changes. A Group Definition can be flagged as Inactive. Inactive Groups will not add group-assignments to student enrollments automatically. NOTE: to add/edit Academic & Skills Objective Codes use the Admin menu's STParm Maintenance page under STParm field name 'RUSUBG'.



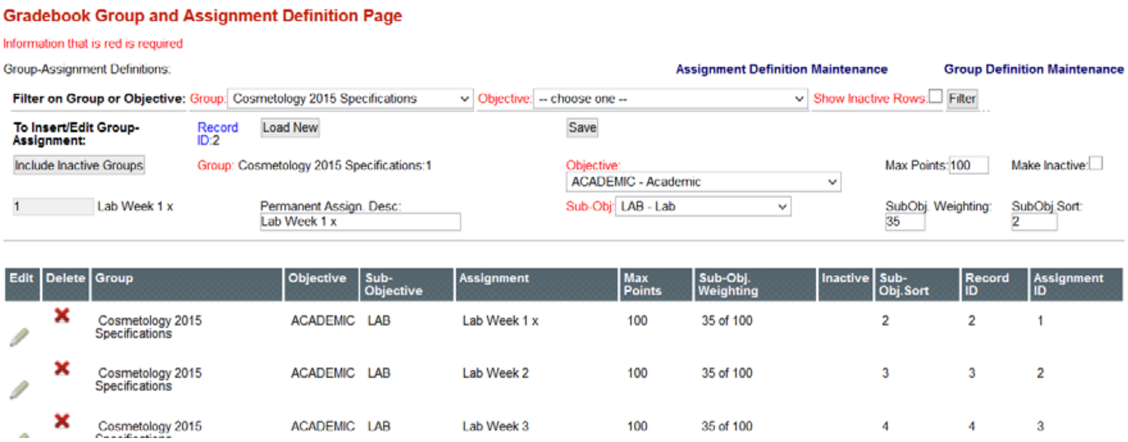
Gradebook Group and Assignment Listing and Setup Page

This page serves to map Assignments with a chosen Group. Once configured the Group ID will be assigned to a specific Course record. To present the assignments in a specific order upon building when a Student enrolls one can provide a sub-objective sort integer in the SubObj. Sort field. Also, particular group-assignments can be flagged inactive. Inactive group-assignments are kept and can be displayed on this page using the Show Inactives checkbox along with the Filter button click as shown in image below. Inactive group-assignments are not used otherwise.

When adding a new assignment to a group you can only have one sub-objective weighting value per its objective. The Save function will automatically synchronize all assignments' weighting in the same group, objective and sub-objective relative to the Group Assignment object being saved.

There is no temporal aspect to a Group and Assignment set aside from it's association with a specific Course (semester). If once students are enrolled and assignments given to them you probably should create a new Group and a new Group and Assignment set if very many changes are desired. Inactive Groups can still be viewed or loaded historically. Use the Include Inactive Groups button to access these in the drop-down list. Assignment Definitions can have their descriptions changed while keeping their same Assignment ID. When an assignment description is changed with the Assignment Definition page the corresponding Assignment description used in the group-assignment table or the enroll-assignment table will NOT change for any pre-existing records. Only NEW group-assignment and enroll-assignment records will have the new Assignment description from that point forward. The group-assignment description is always editable using the Permanent Assignment Description input field.

NOTE: to add/edit Sub-Objective Codes use STParm maintenance program under STParm field name 'RUSBG2'.



Note – the above Gradebook Group and Assignment grid displays in column Sub-Obj Weighting repeated values for the sub-objective weighting within the objective, the total of which should equal 100. So above LAB sub-objective is 35 of 100 even though the 35 value is repeated four times once with each assignment. Here the actual weighting sum is 100 with LAB=35, INTERACT=25 and TEST=40. The Group Definition for Cosmetology 2015 Specifications is Calculate by Objective so the weighting matters.

Guidelines for creating a new semester (term)

The word "term" and "semester" will be used interchangeably within this document. Sub semesters may be used to break a semester down into smaller units within the umbrella semester. Registration, Grade Entry, and Grade Viewing can be controlled using sub-semesters.

Tasks for the creation of a new semester and/or sub-semester should normally be done in a specific order to ensure security and data integrity. These tasks would generally include:

- Adding a new STPARM(s) for the semester or sub-semester description. STPARM for semester is SMDESC. The STPARM for sub-semester is RCSUSM.
- Run the Admin Servlet to include the new STParms. Go to Admin, Admin Servlet, and click Reload Data.
- Adding a new record(s) for the semester dates file FASCDT. This file contains the default dates, credit thresholds, and refund dates for the semester or sub-semester. Therefore it is important that these dates be established first since some of the defaults may be copied into the course file and control files.

- Adding of Registration Control (RGWCON) for semester or sub-semester. This table contains controls that will restrict access for faculty and students and thus it is important that these records be established before other semester based tasks are performed.

- Adding of the Grade Control (RGWGCT) for semester or sub-semester. This file will control and constrain/restrict grade entry for advisors and faculty within the parameters specified in this file. There is a specific permission 278 under the faculty module that must be NA in order for these controls to be applied to the group.

- Copy or enter the course file and change as needed for days and times, prerequisites etc. The course file will adopt certain dates from the semester control file created earlier.

- Copy or enter the new course fees (RGCFEE) if applicable.

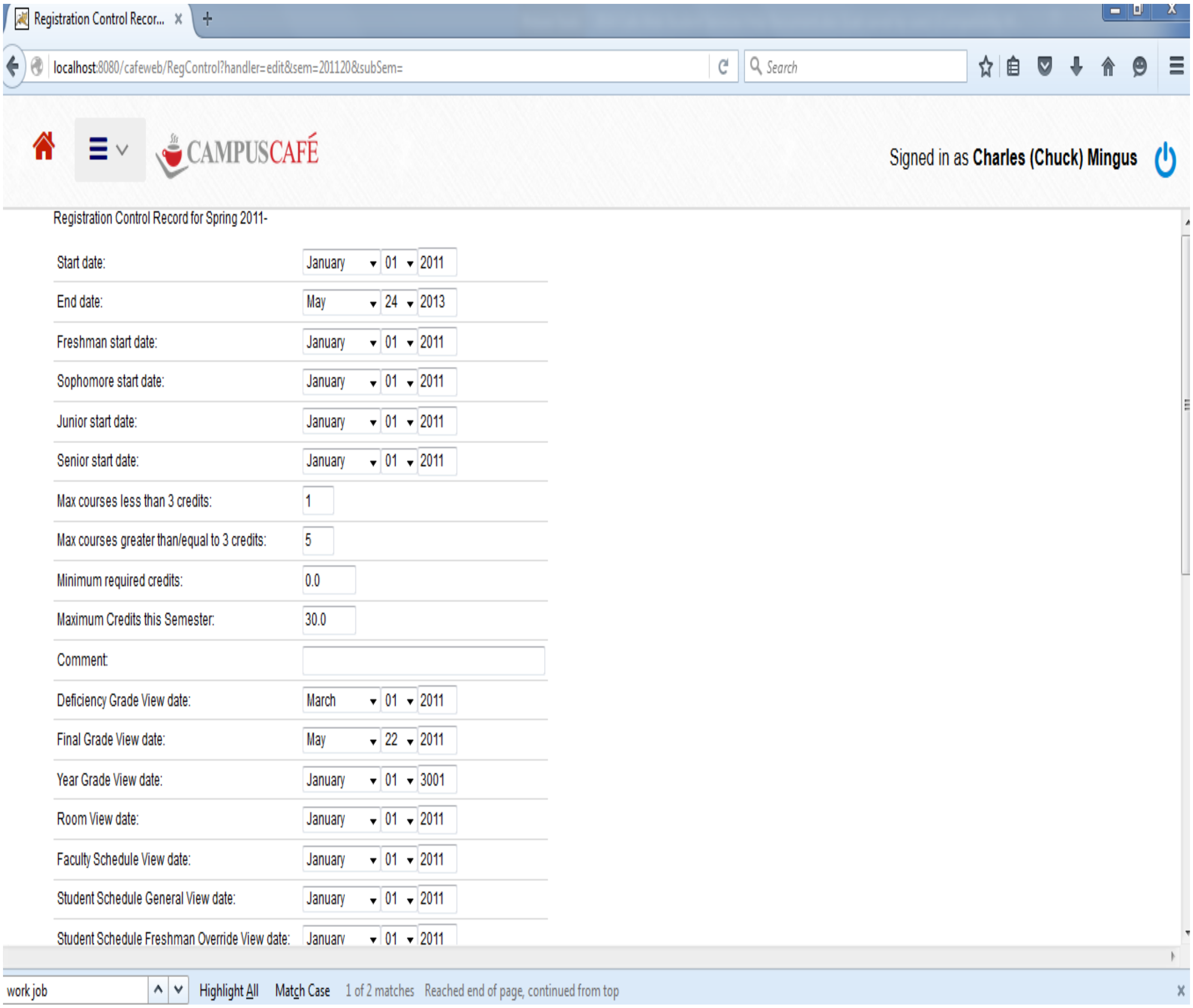
- Copy or enter the billing matrix (BIMATR) for the new term.

- Copy or enter the session data records (HOHIST) for the new term. Billing sites can then be manually changed as needed for the new term.

- Add student permission records (RGWSTP) if applicable. (Example, your institution does not allow students to self-register or you allow them to register without advisor approval). This will allow students to register for the new term and will also adopt defaults from the registration control record. Subsequent changes to RGWCON will not affect the student permission record since data in this record can be manually overridden.

After all of the above steps are completed, advising, registration, and billing can take place. It is also advisable to run a test registration through your test database to ensure that all parameters and rules are up to date. For example, the billing amounts may change from term to term.

Sample RGWCON registration control page:



Appendix A: Email Reminder Quartz Scheduling Configuration

The following image shows an example of setting up a quartz scheduler to automatically run at a specified interval to place email reminders in your inbox.

Cafeweb - configure Quartz Tracking Reminder job

- modify applicationContext-jobs.xml (found in apache-tomcat-6.0.36\webapps\cafeweb\WEB-INF\classes folder) to fire at desired time using the special Quartz reverse time format as example for 03:15 AM below (under cronExpresion property):

```
   <bean id="trackingReminderTrigger"
class="org.springframework.scheduling.quartz.CronTriggerBean">

       <property name="jobDetail" ref="trackingReminderJobDetail"/>

       <!-- run every morning at 3 AM -->

       <property name="cronExpression" value="0 15 3 * * ?"/>

   </bean>
```

Also: you may deactivate/activate the automated job here in this applicationContext-jobs.xml file by commenting out the trigger bean ref tag line as shown below with userCreateTrigger line (apply to trackingReminderTrigger bean if desired):

```
   <bean id="scheduler" class="org.springframework.scheduling.quartz.SchedulerFactoryBean">

       <property name="triggers">

          <list>

       <!-- uncomment ref bean to enable service  -->

<!--              <ref bean="userCreateTrigger"/> -->

             <ref bean="trackingReminderTrigger"/>

          </list>

       </property>

   </bean>
```

- restart Cafeweb after saving changes above

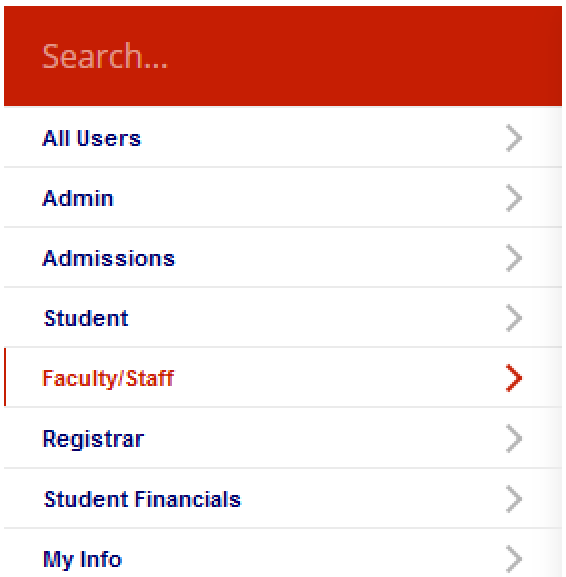
- NOTE: this reminder job can also be fired manually at any time from the Cafeweb Administration->Jobs Management menu.

Uploading Student Photos

Assuming you leave the default settings for file locations and extensions as described at the end of this document, you should be able to upload photos using these instructions.

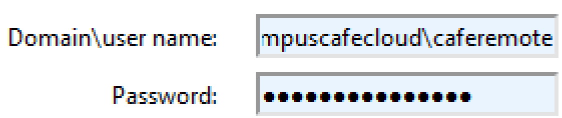
Login in to Campus Café

Go to the Faculty/Staff Menu and select the Notepad++ link.

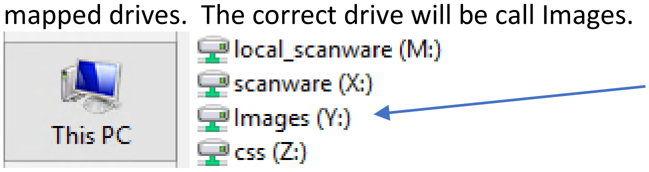


Launch the remote application using your remote user credentials

- Domain\User name: campuscafecloud\xxxremote
- Password: xxxxxxxxxxxxx



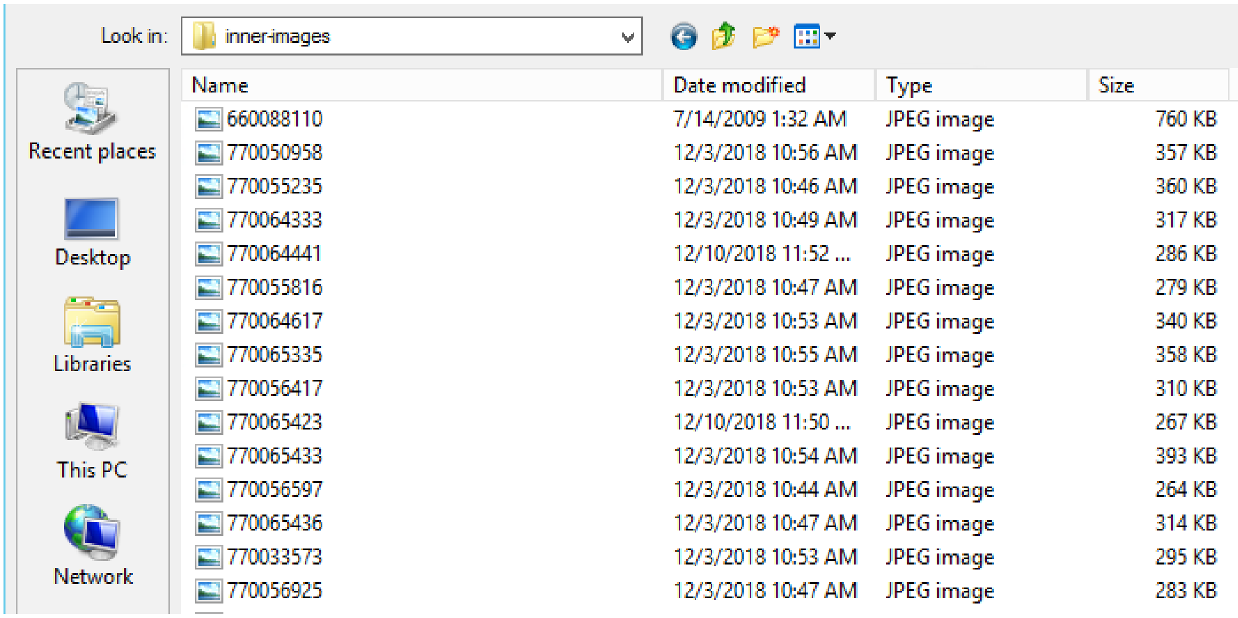
Once the Notepad++ application launches, select Open/File Open… You should see several mapped drives. The correct drive will be call Images.

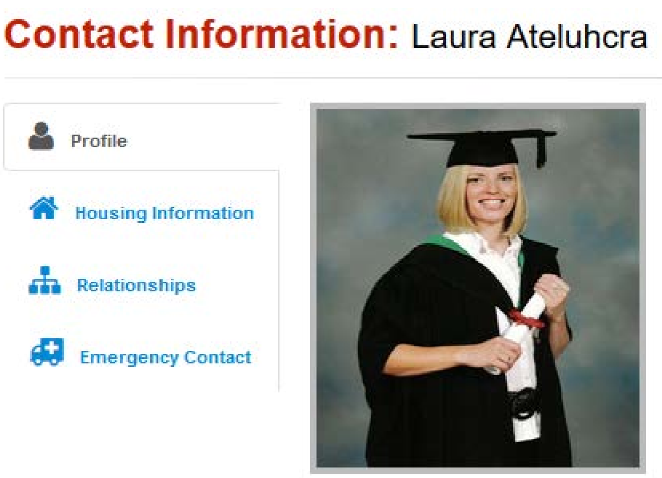


Selecting this drive will give you access to the folder for storing the student pictures. At this point, it is simply a matter of copying the image files from the local folder and using Notepad++ to paste (upload) these files to the Café Web server.

- Browse to the local folder holding the student image files.
- Select All
- Copy

- Navigate back to the still open Notepad++ application, right-click and select the paste option.
- Make sure you use this naming convention – Campus Café ID_NUMBER + default extension (e.g. 2656.jpg).





Custom Control Maintenance

For schools that wish to change the default location or extensions, there are custom controls for this purpose. Go to Admin – Custom Control Maintenance – IMAGE_BIOS: This is the MSPARM that contains the folder where the images need to be stored on the Tomcat server along with the configured/expected file extension (.jpg by default.)

Edit	ProgramId	Seq Num	Parm	Value	Description	Default
	IMAGE_BIOS	1	1	5	CFG_BIOS_SYUSER_IMAGE_LINK = 1;CFG_BIOS_INTERNAL_DB = 2;CFG_BIOS_WEBINF_INNER_IMAGES = 3;CFG_BIOS_EXTERNAL_DB = 4;5	5 = CFG_BIOS_CAFEWEB_IMAGES
	IMAGE_BIOS	1	2		IMAGE FILE DEFAULT EXTENSION IN DOT FORMAT - I.E .PNG	.jpg
	IMAGE_BIOS	1	3	inner-images	IMAGE SUB-FOLDER NAME FOR USE WITH PARM 1 OPTIONS 3 OR 5	inner-images