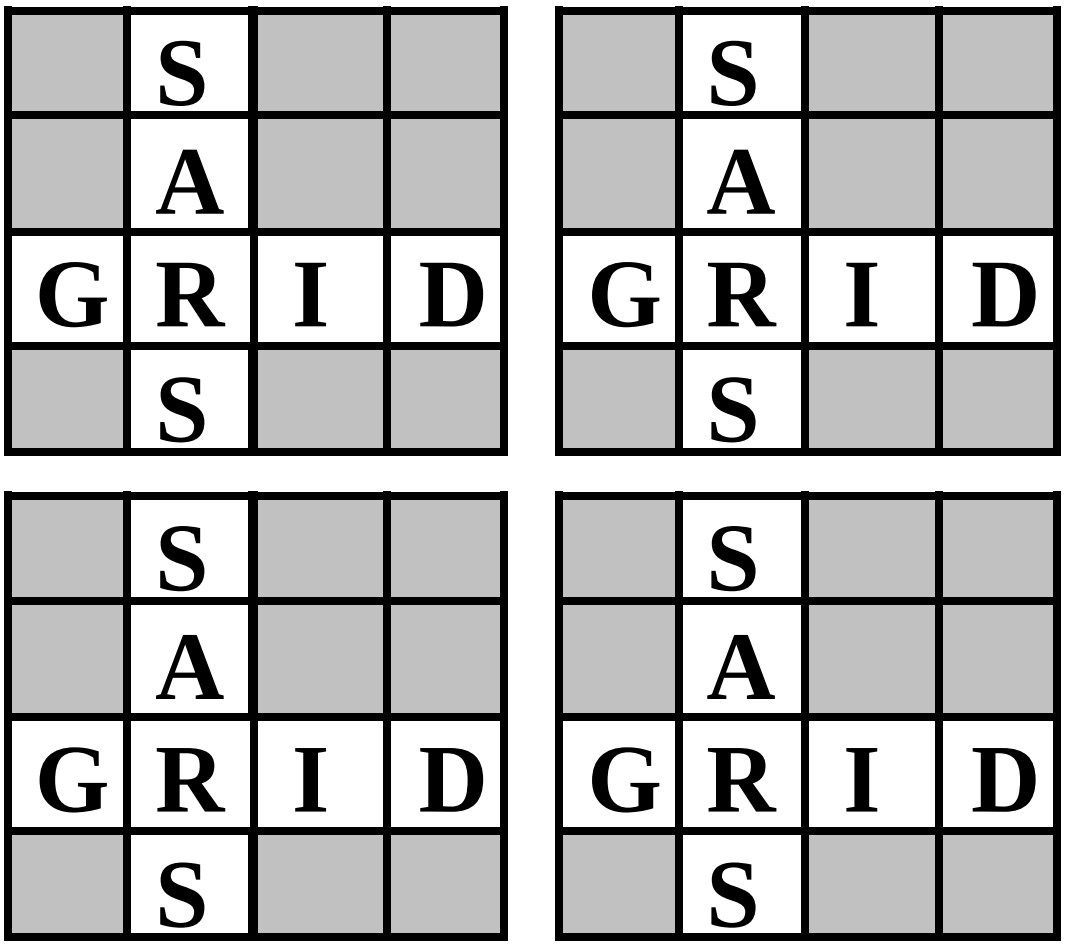
SARS·GRID

USER MANUAL



Scheduling and Reporting System

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INTRODUCTION

Welcome to the SARS·GRID MANUAL. In this book, you will find the information you need to become a skillful user of the SARS·GRID features so that you can effectively carry out your responsibilities as a System Administrator, an advisor, a scheduler, or technical support specialist. A System Administrator is the individual who is responsible for establishing the initial settings in SARS·GRID that will be used by all of the other users. The System Administrator does not need to be a computer expert, but he or she should have some basic knowledge of computers, Windows, and—most important—the scheduling and information needs of the office that is using SARS·GRID.

The purpose of this Manual is to provide an easy-to-follow, non-technical, step-by-step guide for setting up and using SARS·GRID.

What Is SARS·GRID?

SARS·GRID is a multi user scheduling program that is being used by school advising centers and other offices that are automating their scheduling activities. Using SARS·GRID makes it easy to find an available appointment slot, schedule the appointment, print and/or e-mail appointment confirmations, and view reports.

How to Use this Manual

You do not need to read this Manual from cover to cover. It is organized in a manner that will enable you to use it as a reference guide. The topics are presented more or less in logical order, progressing from the initial steps of installing the software and setting up the system for first-time use, using the system to schedule appointments, maintaining the system, and generating useful reports. The topics also include features for advisors, including how to write and view notes about students.

Organization of the Manual

The Manual is organized into seven functional sections. Individual chapters address the main topics with a series of step-by-step instructions.

Part I – Set Up a New Application – will assist the manager in deciding whether to set up separate locations, will provide step-by-step instructions to enable the technical specialist to install the software, and will provide instructions for all users on how to gain access to the SARS·MENU. This part also provides instructions for establishing the required and optional settings that make the application operational.

Part II – Create and Modify Work Schedules – is for those users, primarily system administrators, who will be responsible for establishing work schedules for advisors. If advisors will be responsible for creating or modifying their own work schedules and adding them to THE GRID, this part will be applicable to them, as well.

Part III – The Major Screens – is for any user of SARS·GRID -- System Administrator, advisors, and schedulers.

Part IV – Use the Application (Schedulers) – is for schedulers. It covers all the likely functions that schedulers would perform.

Part V – Use the Application (Advisors) – is for advisors. It covers all of the functions that advisors would typically use.

Part VI – Reports – has all the information you need to view, generate, and print a variety of reports (operational, statistical, system administration and table reports).

Part VII – Technical Issues -- will be of interest to the network administrator, computer support staff, and possibly the System Administrator. If you are an every day "user," you can skip this Part.

Where to Find Other Information

This manual is posted in PDF format in the Client Zone of our website at www.sarsgrid.com. In addition, an on screen help feature is available at any time while working with SARS·GRID simply by pressing the **F1** function key.

Other tools that come with SARS·GRID are:

- Workbook for Administrators
- Quick Guide for Advisors
- Quick Guide for Schedulers

If You Encounter Problems

As you probably know, computers and the programs that run on computers sometimes fail to operate properly. It is often difficult to ascertain the source of the problem. Some possible sources of problems are:

- Your hardware. A part of your computer or a peripheral (keyboard, printer, mouse, etc.) may have failed. If so, you will need to identify the part that is not working and either replace or repair the part.

- Your network. A failure may have occurred in your overall network. If so, your network administrator needs to be alerted to correct the problem.

- Software other than the SARS·GRID software, such as the operating system on a workstation. If so, you need to obtain assistance from your technical support specialist.

- You, the user. Don't take this personally. Even sophisticated users sometimes inadvertently cause the system to crash. Often, the solution to clearing the problem is as simple as rebooting the computer.

- A problem in SARS·GRID itself could actually be the problem. If so, see the next section.

When You Need to Contact Us

SARS·GRID has a web site on the World Wide Web. This web site may be a useful source of information. If you have access to the Internet, you may want to take a look at what the site has to offer by going to www.sarsgrid.com.

If you have a specific question and do not need the answer immediately, you may send us a fax message at (415) 226-0038. If you prefer to send an e-mail message, we can be reached at support@sarsgrid.com.

To speak directly with our customer support staff, the person designated under the Support Agreement as our contact person may call (415) 226-0040 during the following hours: Monday through Friday, 8:30 a.m. to 5:30 p.m. (PT).

OVERVIEW OF SARS·GRID FEATURES

The Visuals

When you open the SARS·GRID MENU icon, you will be prompted to enter a USER NAME and a PASSWORD and then click on CONTINUE. If you successfully pass this test and you have full access rights, a menu will appear on your screen that contains eight options to select. It looks like this:

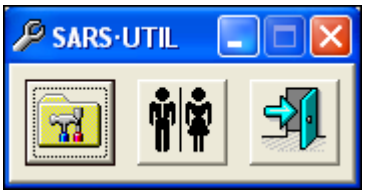
These features are not listed in any particular order in terms of use. In fact, UTIL (which is short for "utilities") is the first feature that needs to be used by the System Administrator when setting up a new application (see Part I).

Most schedulers will probably be using THE GRID (the "guts" of the program), DROP-IN, and perhaps MEETING MAKER and REPORTS, as well as the all-important EXIT.

Advisors most likely will be using MY GRID and DROP-IN.

Some of the choices lead to another, more detailed tool bar or menu. These are shown below.

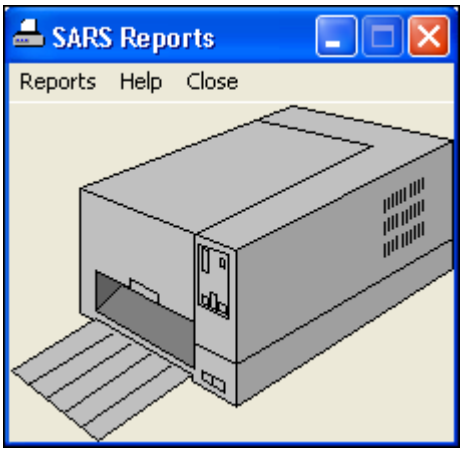
Click on UTIL; another tool bar will appear that looks like this:



Notice that when you view the screen, there is no text describing the icon. To view the description, rest your mouse pointer on the icon for a brief moment (do not click). The text

description will appear below the icon to assist you in understanding whether you are selecting the desired feature.

When you click on REPORTS, a menu will appear that looks like this:



Navigating around SARS·GRID Features

You should feel free to browse through the various features that you see in SARS·GRID. If you are a user but not the System Administrator, and the system is already set up, you may find that you are unable to obtain access to a particular function. This does not necessarily mean that the system is failing to work properly. It may mean that based on your role in the office, you have not been provided access to the function. This is a safeguard that is built into the system to prevent unauthorized or unnecessary changes to the underlying set-up. If your role requires that you have access to a denied-access function, speak with your System Administrator.

Terminology

Because schools' formats for student ID's differ, the generic label "ID" is used for the field that accepts a student identification number. This field may accept such ID's as the following: Student ID, Guest ID, Ellucian's Banner® ID or Colleague® ID, PeopleSoft ID, or Social Security Number, and the label for the field will be a school-assigned label. All names and ID's used in the examples in this Guide are purely fictitious. Any resemblance to actual people or ID numbers is purely coincidental.

Where to Start

Now let's move on. If you are a System Administrator, you may want to start at the beginning. If you are an advisor or scheduler, you may want to briefly review Part I, Section 3, and then go to Part III.

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PART I – SET UP A NEW APPLICATION

Part I is intended for use by the System Administrator and, in part, for computer support staff. It contains the information needed to install, open and close the application, and to set up the necessary behind-the-scenes information to make it operational. This information is contained in the following Sections:

INTRODUCTION

After installing SARS·GRID, you will need to decide the extent to which users will be allowed to view and/or work with various aspects contained in the application. Section 1 will aid managers in making this important decision. Once the decision is made, your computer support staff will be able to install the software by following the steps in Section 2. Section 3 provides step-by-step instructions on how to access the menu of SARS programs so that you may begin to enter information that is required for the application to be used.

Then Sections 4 and 5 take the system administrator through the steps necessary to set up the required and optional information to make the application operational.

SECTION 1 – BEFORE STARTING

1.0 Overview

This Section discusses the first essential decisions that need to be made before setting up SARS·GRID. SARS·GRID uses a single database to hold all scheduling information and all student-related information. However, colleges that have more than one department or location using the software may opt to share or not share various aspects of the information in the database. Thus, the college must determine at the outset whether to establish more than one location in the system.

Do You Want to Establish Separate Locations?

"Location" refers to a logical division of people by function and organizational structure. Examples of locations are: Advising Center, Counseling Center, Career Center, Assessment Center, and Disabled Student Services. If one or more of these locations functions autonomously or has different work hours or advisors, it would be logical to set up the system for distinct locations. If one or more of these locations has confidentiality needs and wishes to prevent users in other locations from viewing such confidential information, it would also be logical to separate those locations.

Ability to Customize

Separate locations allow each department to establish settings that reflect its own needs. For example, each location can establish unique settings for the following parameters:

Start and stop times for the workday
Appointment time interval
Reason codes
Schedule codes
Additional information questions
and more.

Customizing the system may be desirable if some departments serve different types of students. In such a case, customizing by location can make the system more relevant for users.

Ability to Control Access

Dividing usage of the SARS database by location allows for access to critical functions to be controlled, as desired, by each location. For example, if Location A allows advisors to schedule appointments, but Location B does not, Location A may grant its advisors the right to schedule appointments and Location B may deny its advisors that access right, granting it only to Schedulers. In addition, each Location can decide the extent to which users from outside the department will have access to its student information (advisor notes, student appointment history, additional information about students).

After You Have Decided

After reviewing this section, you should refer to the Workbook for Administrators. The Workbook will guide you through the decisions that must be made when setting up SARS·GRID for use. A separate Workbook should be completed for each Location.

SECTION 2 — Install SARS·GRID

2.0 Overview

This Section explains how your computer support staff should install the SARS·GRID program. We will have pre-installed the software onto your designated server. Client Workstation installation takes only a few minutes per workstation. This procedure needs to be completed prior to any on-site training by SARS Software Products, Inc.

The following installation operations must be performed to properly install SARS·GRID.

- Server
  - create database(s)
  - create application file share(s)
  - modify client installer

- Client Workstation

Note SARS·GRID supports the international date format. The default format will be created when the database is first installed on the server. Individual users may switch the date format on their own PC's using the Microsoft Windows Control Panel settings.

2.1 Perform the Server Installation

Note SARS·GRID works with any Windows-compatible network. It has been successfully tested on Novell, Windows 2000 - 2008 Server operating systems with Microsoft SQL Server. The system has an initial requirement of 80 megabytes of disk space per application, but requires additional disk space as the data stored in the system grows. The system does not require a dedicated server.

2.1.1 Create the Database

The SARS·GRID program has been successfully tested on the following Microsoft SQL Server versions:

- Microsoft SQL Server 2000
- Microsoft SQL Server 2005
- Microsoft SQL Server 2008
- Microsoft SQL Server 2008 R2
- Microsoft SQL Server 2012

Note SARS·GRID will work on Express Editions of Microsoft SQL Server; **however, it is NOT** recommend by SARS Software Products, Inc. to use this version, since Microsoft has placed limitations on the maximum size of a database in Express Editions, along with other reduced features.

Please visit the Microsoft website for comparison of the different releases and editions that are available.

1. Create a database on the designated SQL Instance that will be storing the SARS·GRID database(s) (for example, SARS).

2. Locate the folder for the SQL SCRIPTS and double-click to open the folder.

3. In MICROSOFT SQL SERVER MANAGEMENT STUDIO, open the file SARS_4.45.sql and execute it against the database created in **step 1**.

4. In MICROSOFT SQL SERVER MANAGEMENT STUDIO, open the file INSERTDATA.sql and execute it against the database created in **step 1**.

Note The INSERTDATA.sq file is to be executed **once**.

5. In MICROSOFT SQL SERVER MANAGEMENT STUDIO, expand the DATABASES folder and locate the database created in **step 1**.

6. Double-click the database created in **step 1** and expand the TABLES folder.

7. Locate the table, Tbl_System_Control, and right-click to select the option to edit rows.

Note If the international date format will be used for birth date, edit the option to reflect the dd/mm/yyyy format. See example below.

	ID	DB_Version	Lic_User	Default_Password	Lic_Key	Min_TRAK_Ver	Min_GRID_Ver	Phone_Number...	Birth_Date_For...	Script_Vers
	1	4.45	North Bay Comm...	1234	07D1-9C21-00E...	4.7.30	4.7.0	(###) ###-##...	dd/mm/yyyy	4.45
*	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL

8. Locate the Lic_User column and enter the value provided by SARS Software Products, Inc.

9. Locate the Lic_Key column and enter the value provided by SARS Software Products, Inc.

10. Execute the changes made in **step 8** and **step 9**.

11. In MICROSOFT SQL SERVER MANAGEMENT STUDIO, expand the SECURITY folder.

12. Right-click on the LOGINS folder and select NEW LOGIN.

    a. If SQL Server authentication is being used, enter the following information:

    Login Name: sarswiz
    Password: (Contact SARS Software Products, Inc.for password)
    Enforce password policy: uncheck
    Enforce password expiration: uncheck
    User must change password: uncheck

    b. If Windows authentication is being used, enter the user and/or user groups.

Note Each account must be entered separately through MICROSOFT SQL SERVER MANAGEMENT STUDIO. Click OK and repeat **step 12**, if more than one user needs to be entered. The sarwiz account **only** needs to be entered once.

13. Once an account has been entered, select LOGINS folder and right-click on the login entered in **step 12**.

14. Select PROPERTIES.

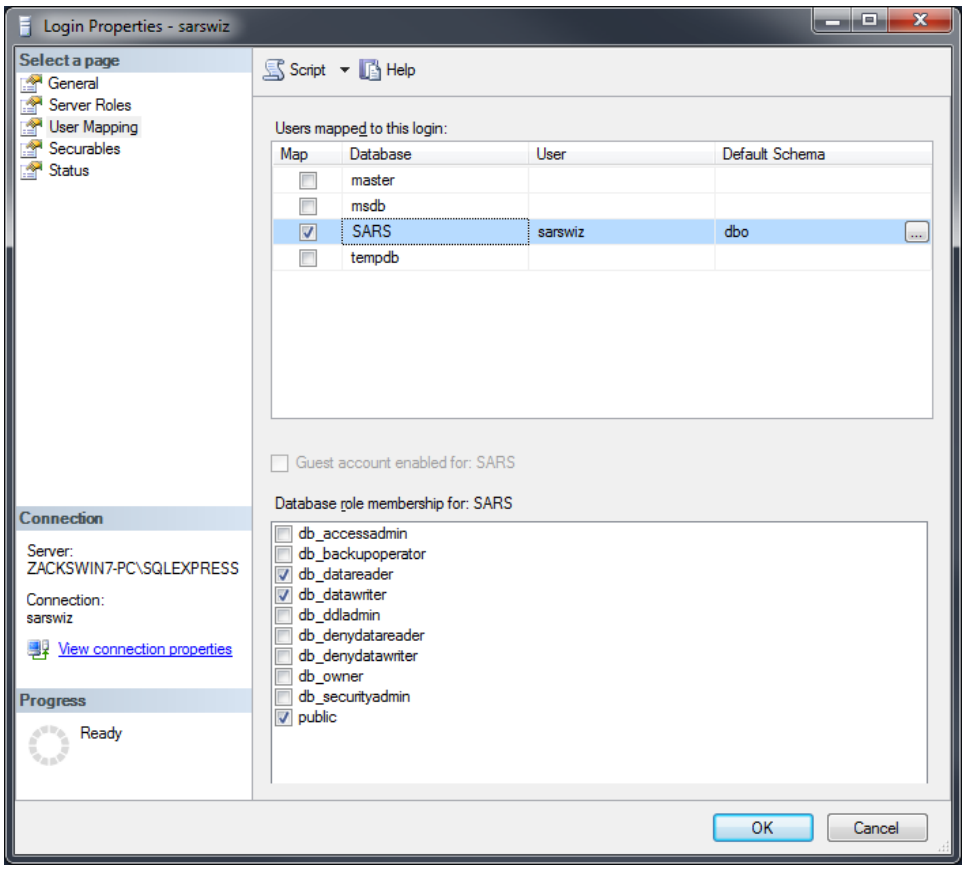
15. Select USER MAPPING.

16. Under the MAP column, check in the database created in **step 1**.

17. With the database created in **step** 1 selected, locate the section DATABASE ROLE MEMBERSHIP FOR:

18. Under the section DATABASE ROLE MEMBERSHIP FOR: the following permissions need to be enabled by checking the box next to the permission:

    - db_datareader
    - db_datawriter
    - public



19. Click Ok.

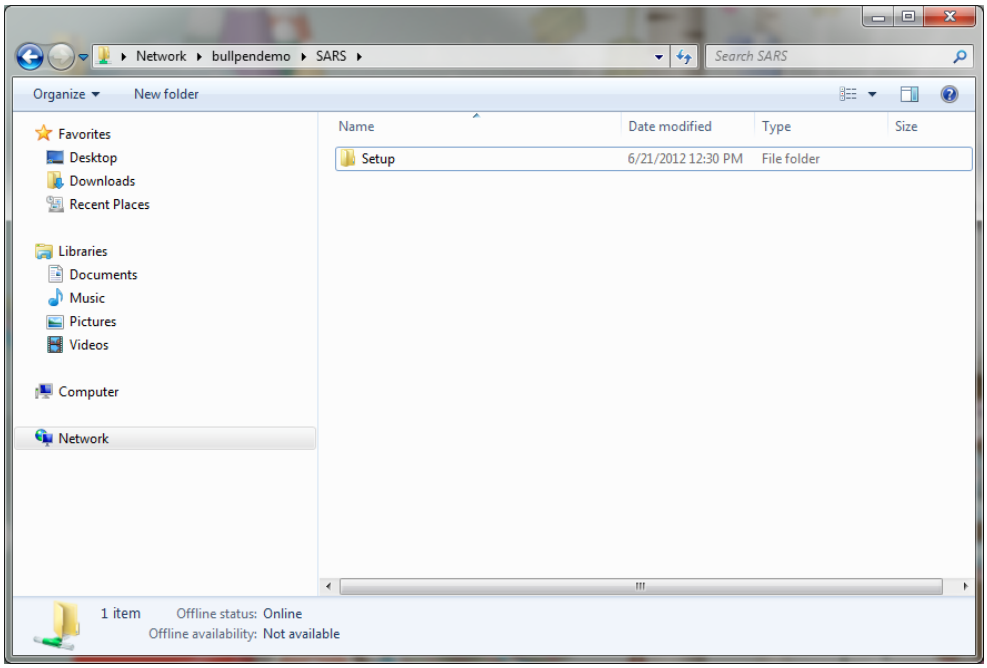
2.1.2 Create Application File Share

As mentioned above, the system has an initial requirement of 80 megabytes of disk space per application, but requires additional disk space as the data stored in the system grows. The system does not require a dedicated server.

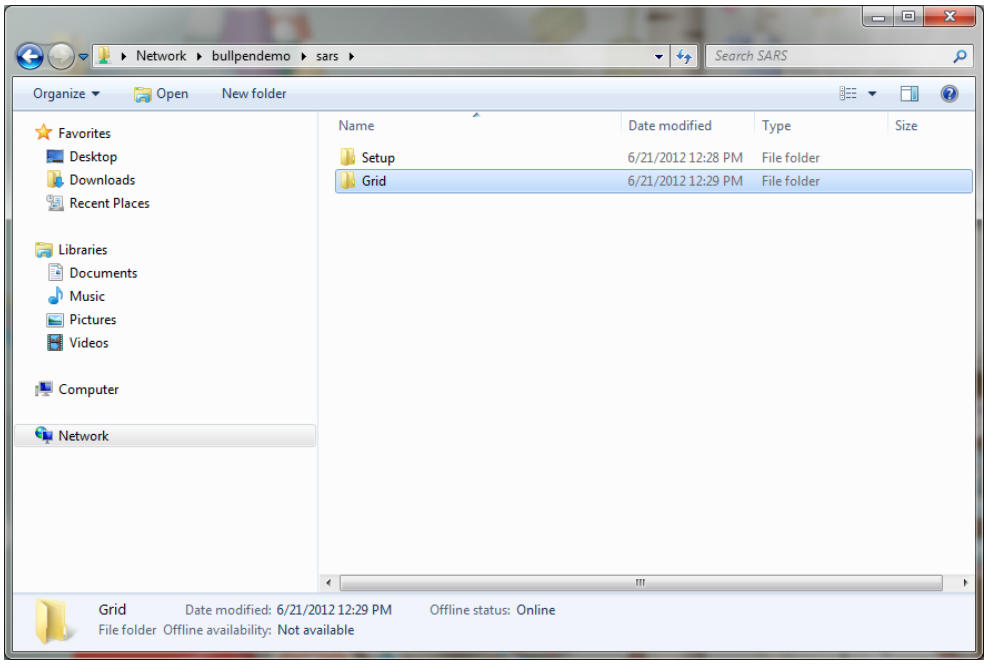
1. Create a directory on the designated server to house the SARS·GRID software (for example, SARS).

2. Open the folder created in **step 1**.

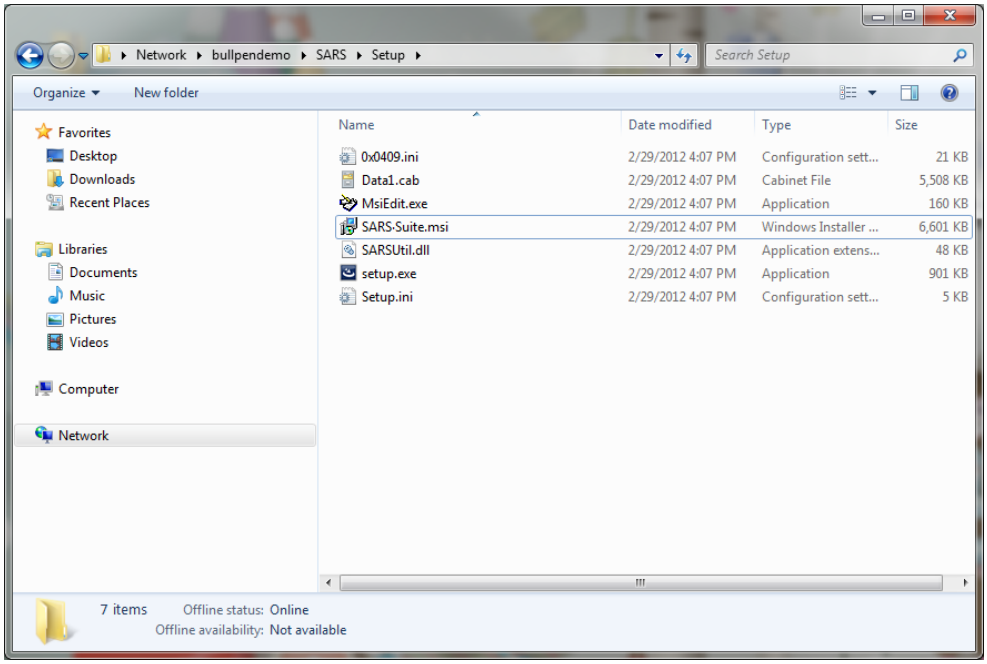
3. Create a subdirectory under the folder created in **step** 1 called SETUP.



4. Create a subdirectory under the folder created in **step** 1 called GRID**.**

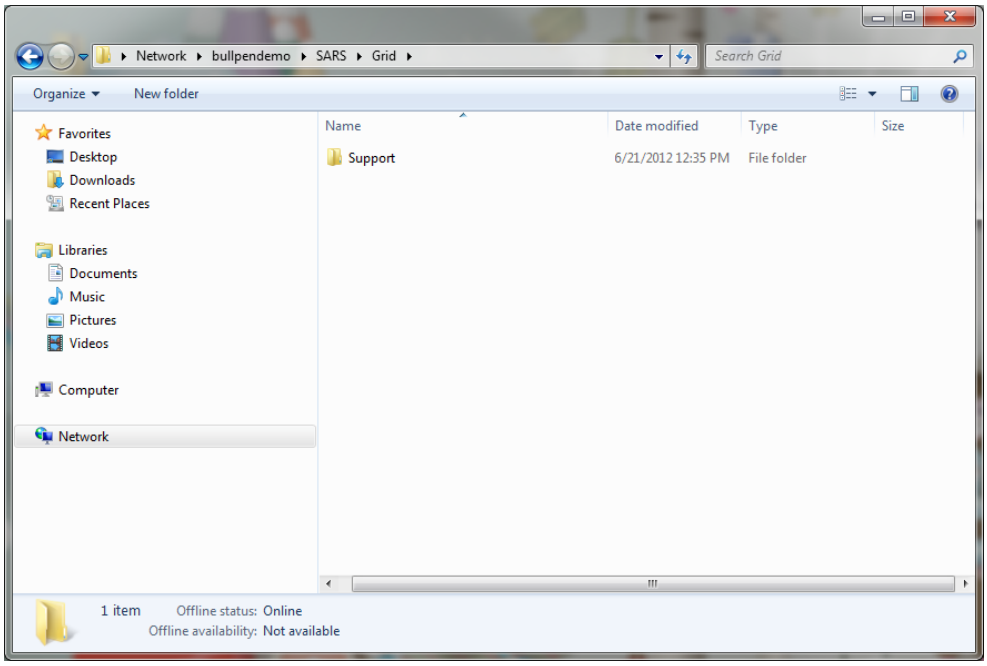


5. In the SARS·GRID software, locate the INSTALL folder. Copy the contents of the INSTALL folder into the SETUP folder created in **step 3.**

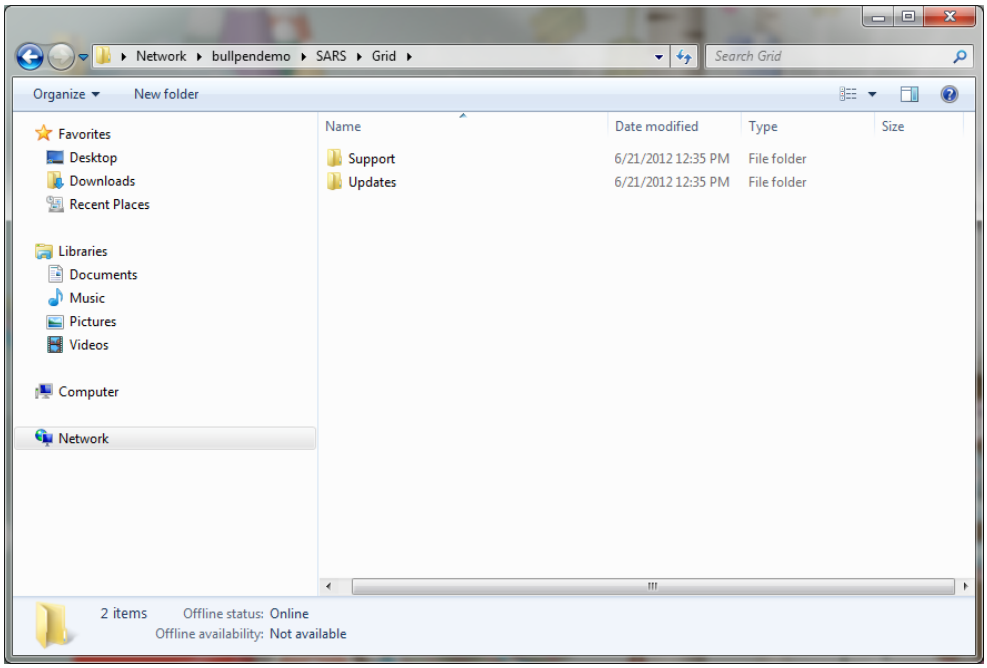


6. Open the subdirectory GRID folder created in **step 4.**

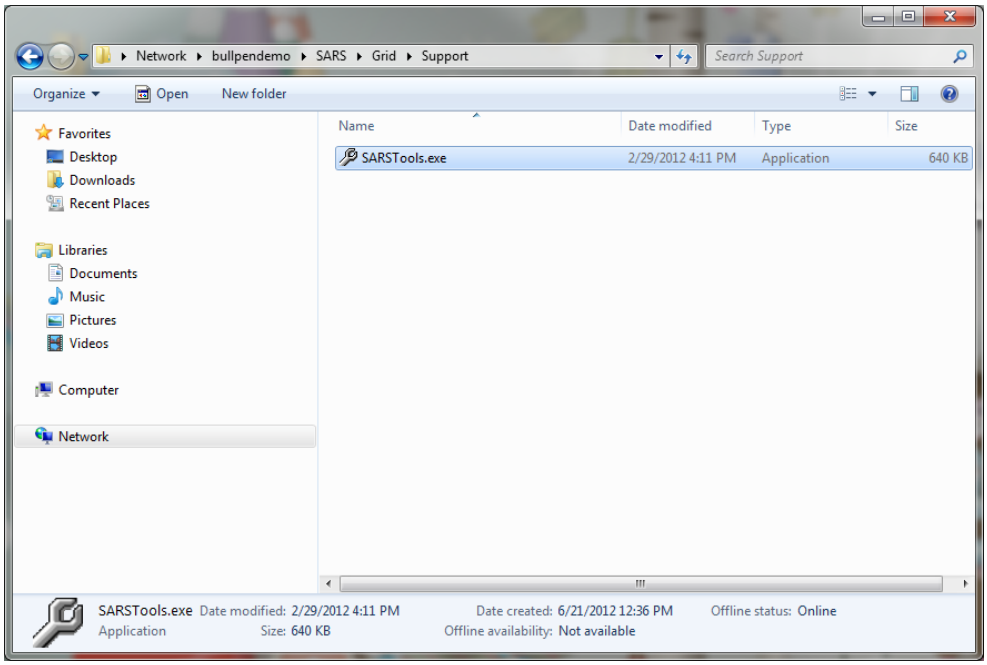
7. Create a subdirectory under GRID folder created in **step 4** called SUPPORT**.**



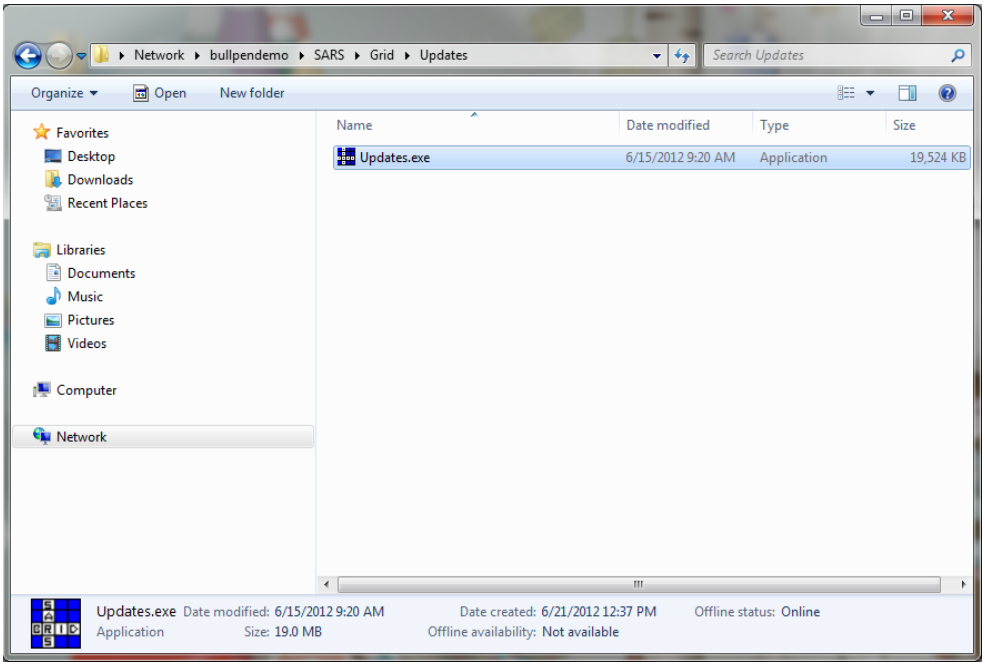
8. Create a subdirectory under GRID folder created in **step 4** called UPDATES**.**



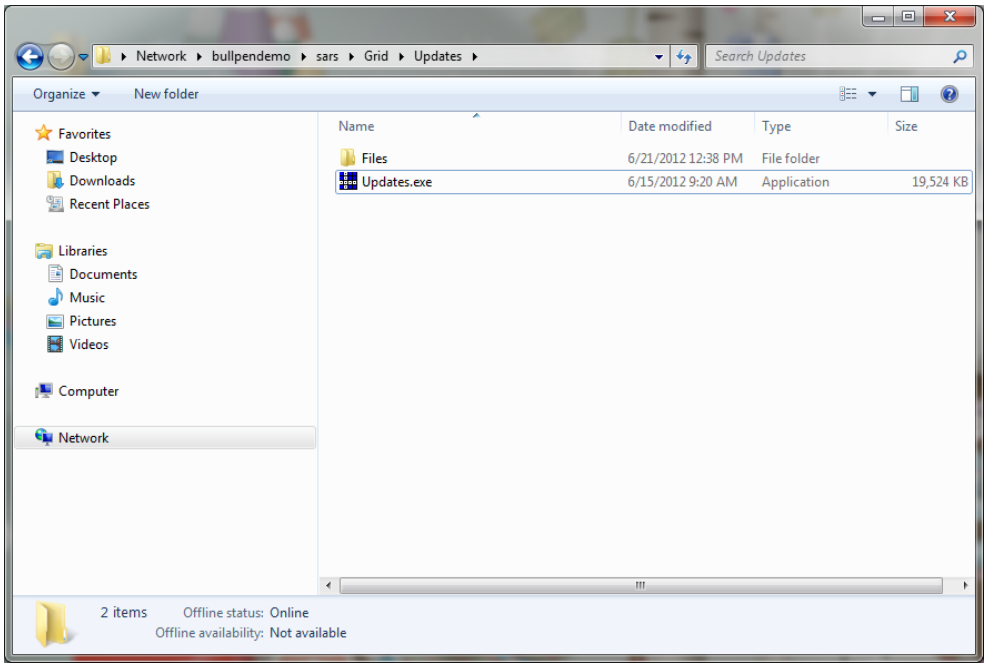
9. In the SARS·GRID software, locate the INSTALL folder. Copy the contents of the SUPPORT folder into the SUPPORT folder created in **step 7.**



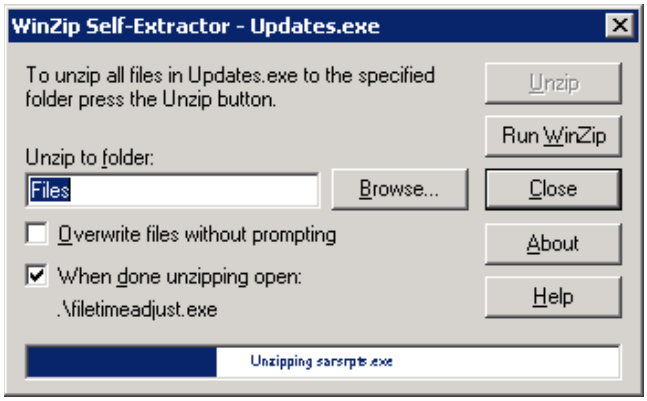
10. In the SARS·GRID software, locate the FILES folder. Copy the executable, UPDATES.EXE, in the FILES folder into the UPDATES folder created in **step 8.**



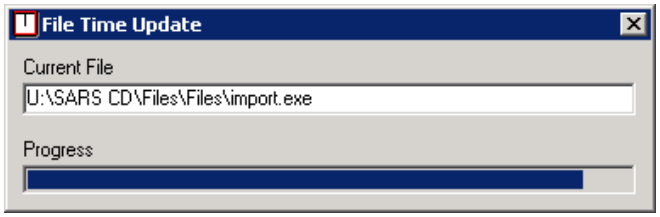
11. Double-click the UPDATES.EXE to run the executable. When finished, this will create a folder called FILES.



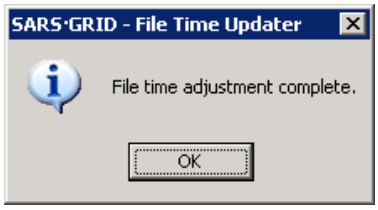
Below are the series of screens that will appear once the UPDATES.EXE executed:



When finished, the following will appear and execute on its own:



Once finished, the following will appear:

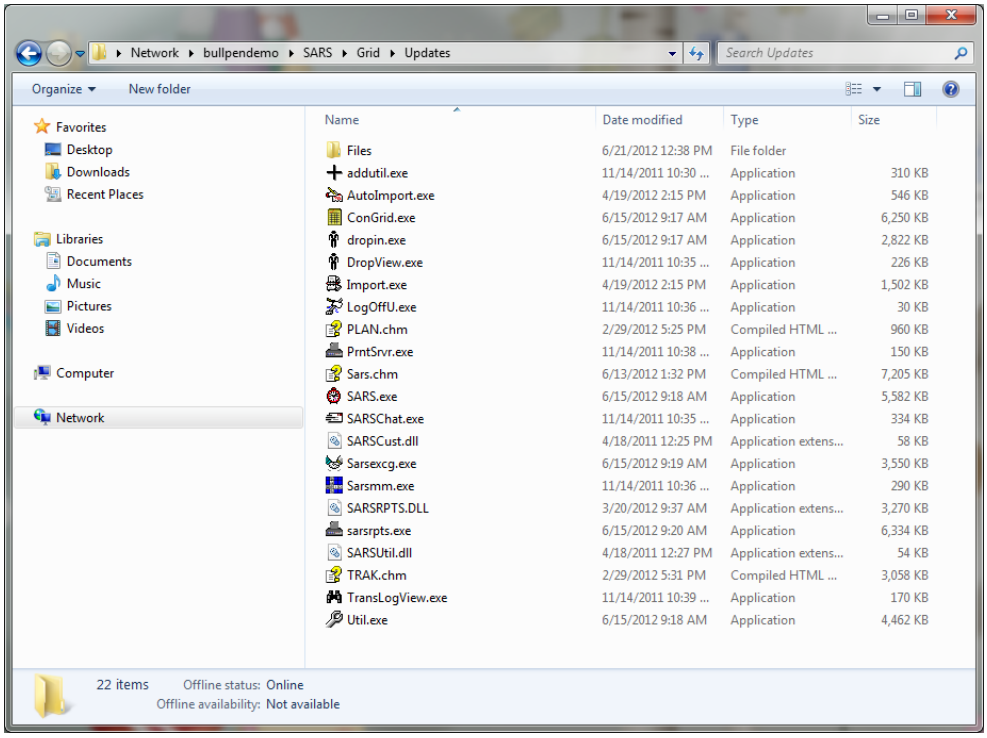


Click OK.

12. Open the FILES folder.

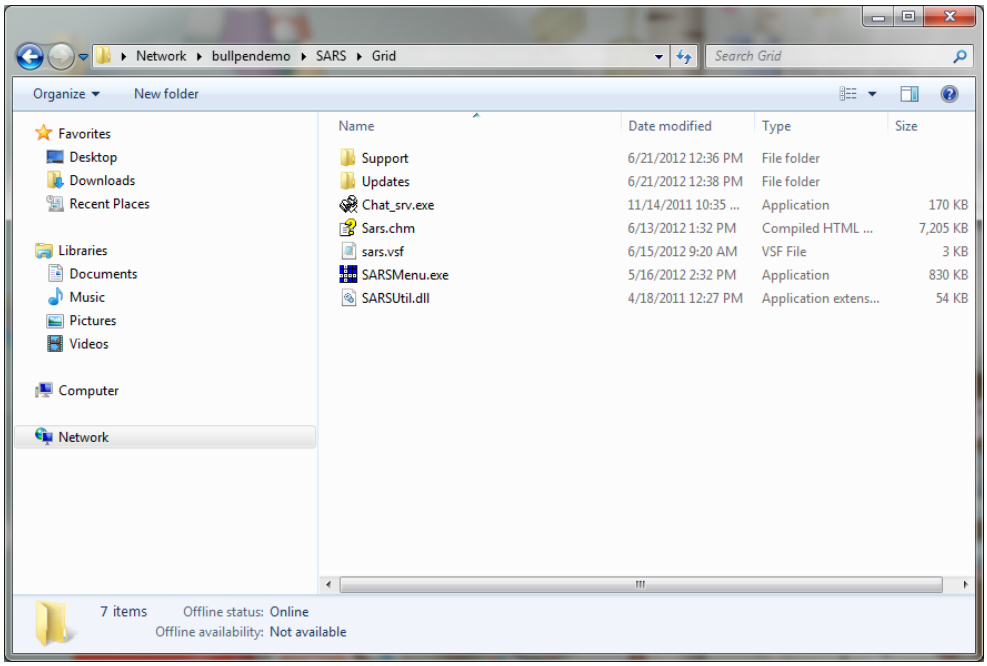
13. Copy all files in the FILES folder into the UPDATES folder **EXCEPT** the following, and then delete the UPDATE.EXE file from the UPDATES folder:

    - Chat_srv.exe
    - FileTimeAdjust.exe
    - sars.vsf
    - SARS_4.45.sql
    - SARSMenu.exe
    - SARSVer.dll



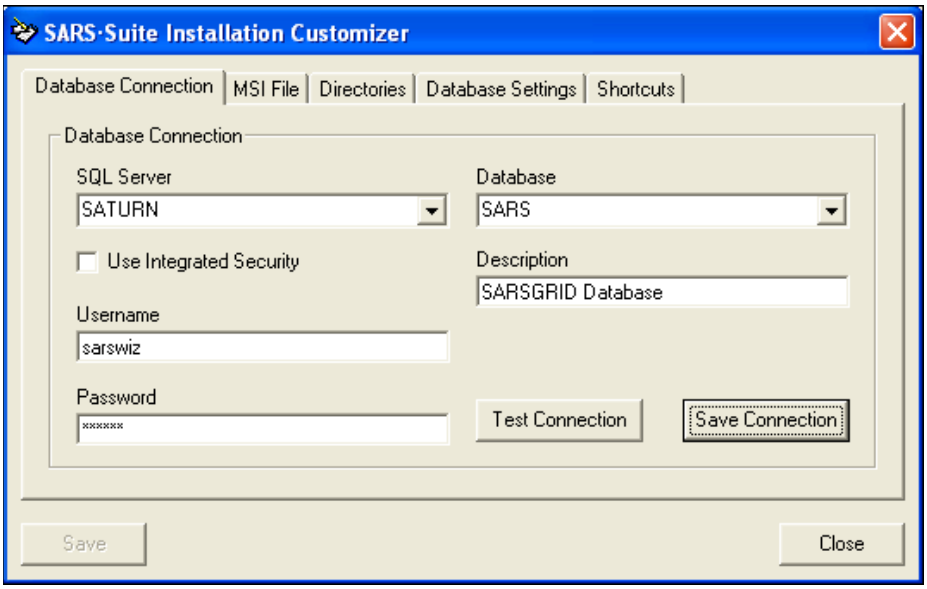
14. Copy the following files in the FILES folder into the GRID folder:

- Chat_srv.exe
- Sars.chm
- Sars.vsf
- SARSMenu.exe
- SARSUtil.dll



2.1.3 Modify the Client Installer

1. Locate the executable for the SARS·SUITE INSTALLATION CUSTOMIZER, and double-click on it to display the Installation Customizer screen. Here is an example:



2. To create a database connection:

   a. Click on the SQL SERVER field and type the in name of the SQL Server that holds the SARS·GRID database.

   b. Click on the DATABASE field and type in or select the name of the SARS·GRID database. (e.g., SARS).

   c. Click on DESCRIPTION field and type in a description of the database (e.g., Advising Database, or SARSGRID Database).

   d. [Optional] Click on USE INTEGRATED SECURITY to require users to enter user and password login information in order to gain access to the SARS database. Otherwise, leave this option unchecked.

   Note If this option is used, the IT department will need to maintain a list of users who have access to the database.

   e. If the INTEGRATED SECURITY option is not selected,

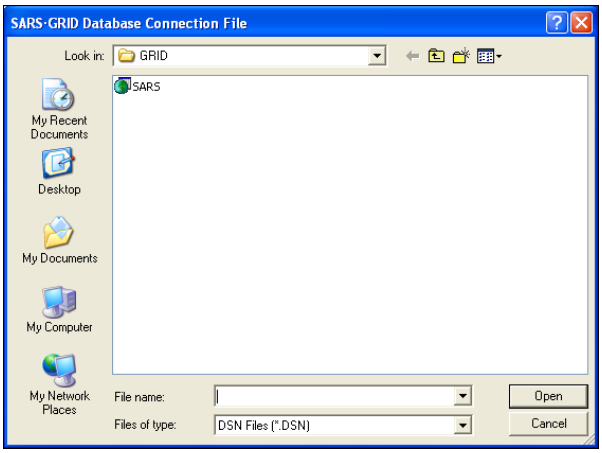
      i) Click on the USERNAME field and type in the following username: SARSWIZ.

      ii) Click on the PASSWORD field and type in the password. (Contact SARS Software Products, Inc. for information about this password.)

f. Click on TEST CONNECTION. If the connection is successful, the following message will be displayed.

g. Click on OK.

h. Click on SAVE CONNECTION. The following screen will be displayed:



i. Verify the directory path, where the connection file is to be saved, is the GRID subdirectory created in step 4 of 2.1.1. If it is not, change the directory path to the GRID subdirectory created in step 4 of 2.1.1.

j. Click on the FILE NAME field and type in file name (e.g., SARS.dsn).

k. Click on OPEN to save the file and return to the INSTALLATION CUSTOMIZER screen.

Note If any of the information entered on the Database Connections screen is incorrect, the following message will be displayed,

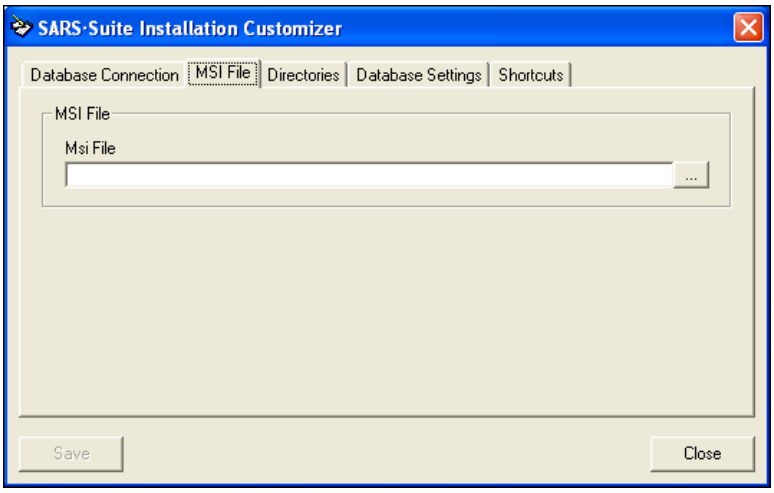
To correct the errors,
i) Click on OK.
ii) Modify the information.
iii) Click on TEST CONNECTION again.
iv) If the connection is successful, click OK.
v) Click SAVE CONNECTION.

Note If you click on SAVE CONNECTION, but the database connection has not yet been tested successfully, the following message will be displayed.

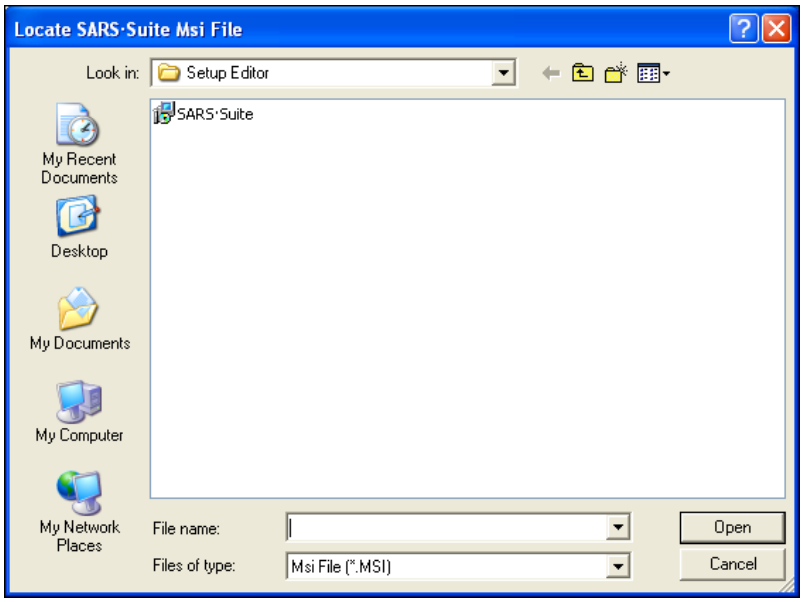
Click on OK, and return to step f.

3. Open the database connection file in notepad, click on FILE and select SAVE AS. Verify the ENCODING type is set to UNICODE. If it is not, change it to UNICODE and click SAVE.

4. Click on MSI FILE tab. The following screen will be displayed.



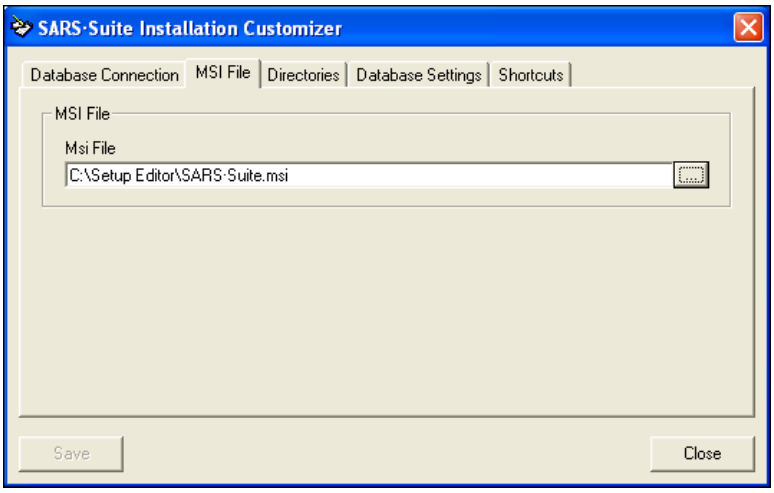
a. Click on MSI FILE … to display a File Open dialog box. Here is an example:



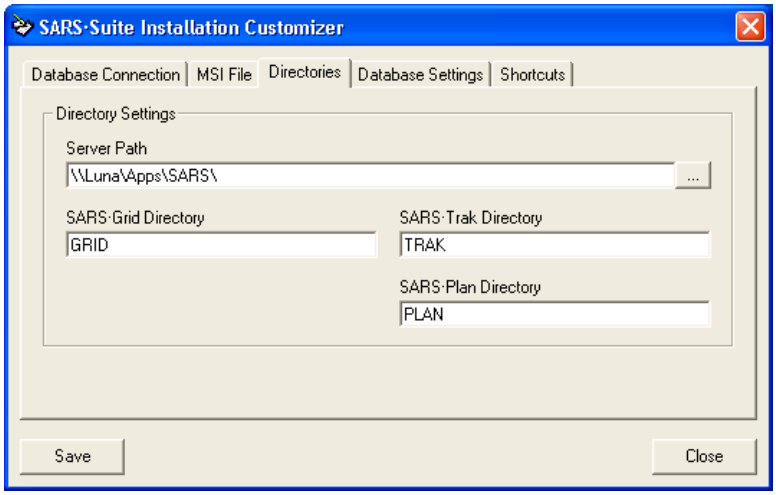
b. Browse to locate the SARS·SUITE.msi file.

c. Click on the desired file to place the file into the File name field.

d. Click on OPEN to close the screen and return to MSI FILE tab. The Msi file should be displayed in the Msi file field. Here is an example:



5. Click on the DIRECTORIES tab. The following screen will be displayed:.



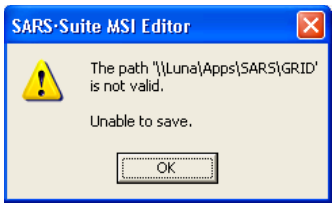
a. Click on SERVER PATH … to open a Browse for Folder dialog box, and select the path where the SARS·GRID applications are located. Click on OK to return to the screen.

b. Click on the SARS·GRID DIRECTORY field and type in the path where the SARS·GRID files are located.

c. Click on the SARS·TRAK DIRECTORY field and type in the path where the SARS·TRAK files are located.

d. Click on the SARS·PLAN DIRECTORY field and type in the path where the SARS·PLAN files are located.

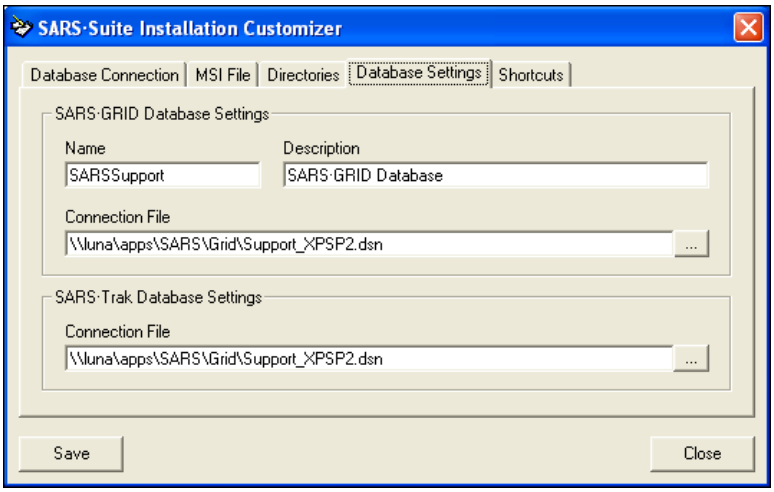
Note If the SERVER PATH is unable to be save to, or one of the application directory paths is invalid, you will receive the following message when you try to save.



Click OK, and return to step 5.

If the directory paths do not exist for an application, simply leave the directory field blank.

6. Click on the DATABASE SETTINGS tab to display the following screen:



a. For SARS·GRID database settings:

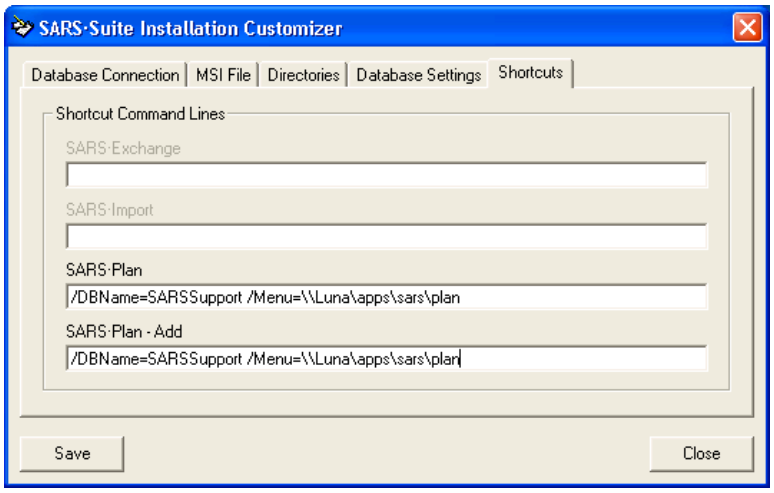
   i) Click on the NAME field and type in the name of the database where the SARS·GRID data resides.

   ii) Click on the DESCRIPTION field and type in a description of the SARS·GRID database.

   iii) Click on CONNECTION FILE … and browse to find and select the .dsn file containing the connection information for the SARS·GRID database.

b. For SARS·TRAK database settings, click on CONNECTION FILE … and browse to find and select the .dsn file containing the connection information for the SARS·TRAK database

7. (Optional) Click on the SHORTCUTS tab. Here is an example:



Note It is not necessary to complete the fields on this screen if you have already edited the Directories and Database Settings tabs, because those values will have already been inserted into their respective fields. It is recommended that these shortcuts be altered only in consultation with SARS Software Products, Inc

8. When done, click on SAVE.

9. Click on CLOSE.

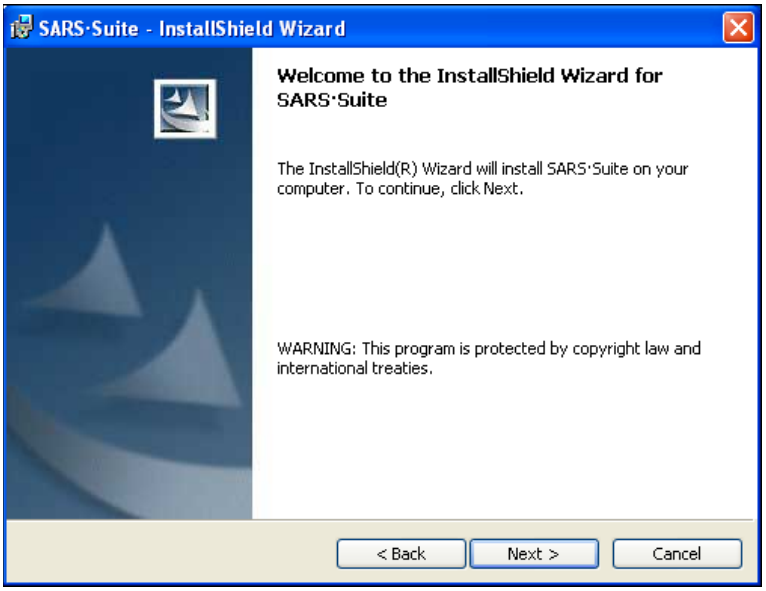
Note
If the college wishes to use instant messaging so that users can send and receive messages, broadcast messages, and use the notification of appointment arrival feature, the application must first be configured for use. This should be done by the computer specialist. (See "Configure SARS·CHAT" in Section 46.1, Part VII.)

2.2 Perform a Client Workstation Installation

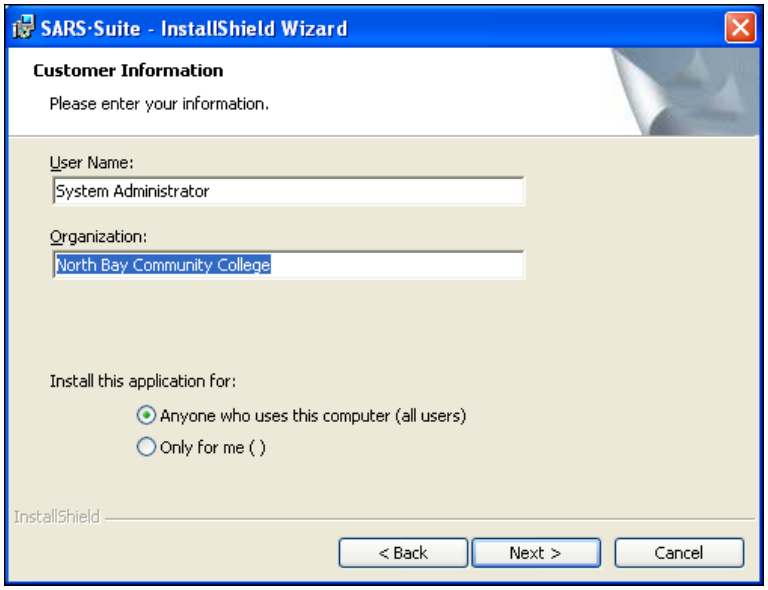
After installing SARS·GRID on the server, run the setup.exe (created by the preceding steps) from each client workstation that will be using SARS·GRID.

1. Go to directory containing the SARS·GRID setup program and click on setup.exe. The following screen will be displayed.

2. Click on NEXT to display the following screen.



3. Click on NEXT to display the following screen.

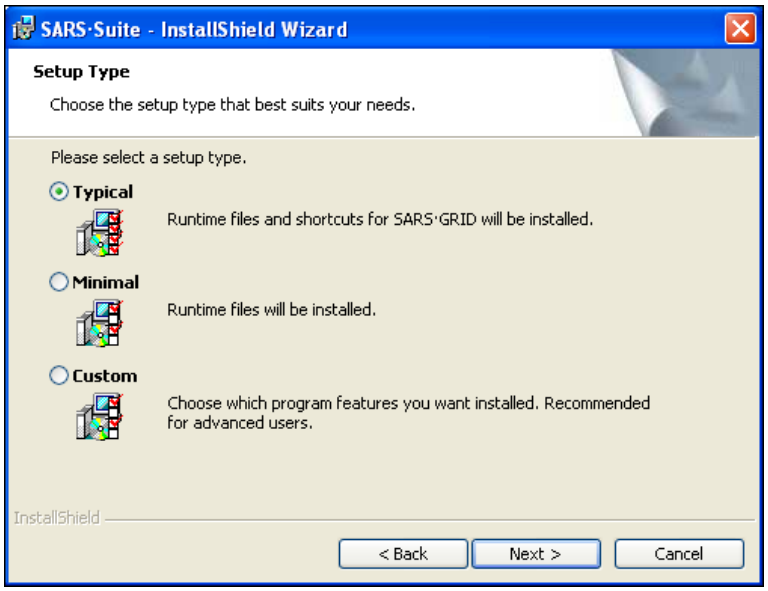


4. Click on the USER NAME field and enter a User Name.

5. Click on the ORGANIZATION field and type in an Organization name.

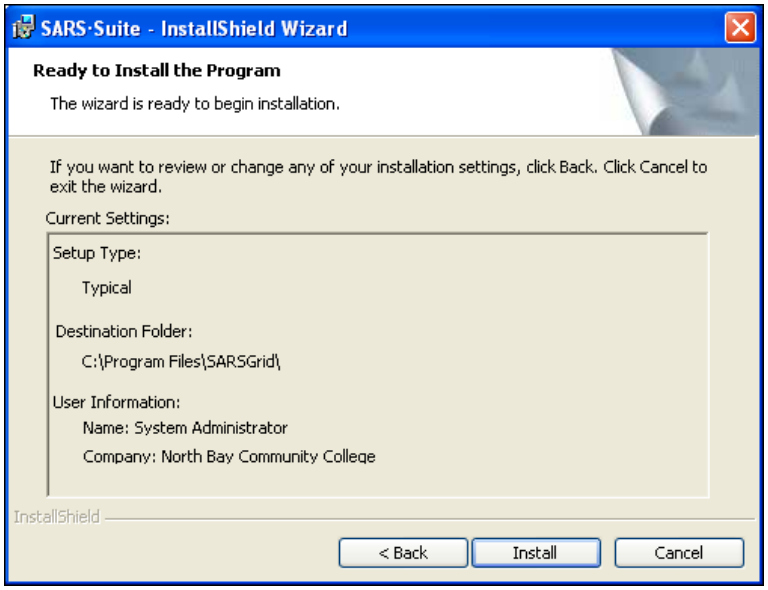
6. Click on one of the options shown on the screen (recommended selection is “anyone who uses this computer [all users].

7. Click on NEXT to display the following screen:

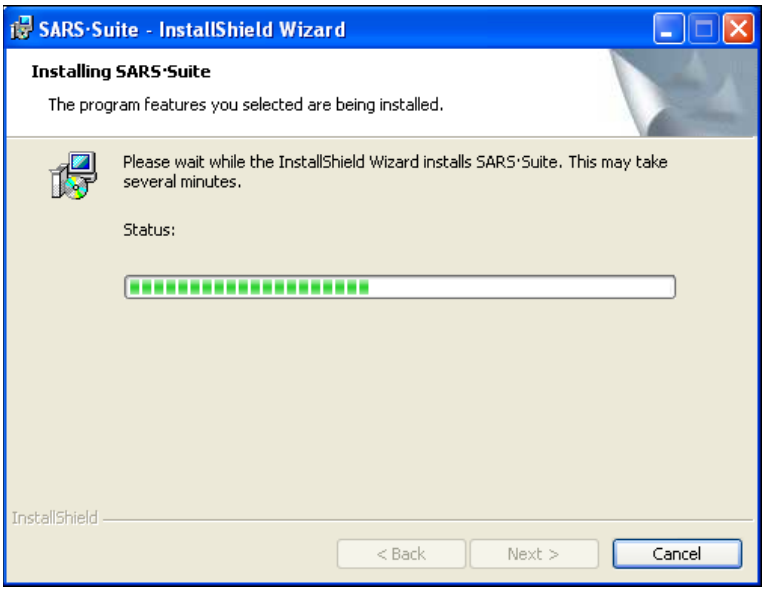


8. Click on TYPICAL.

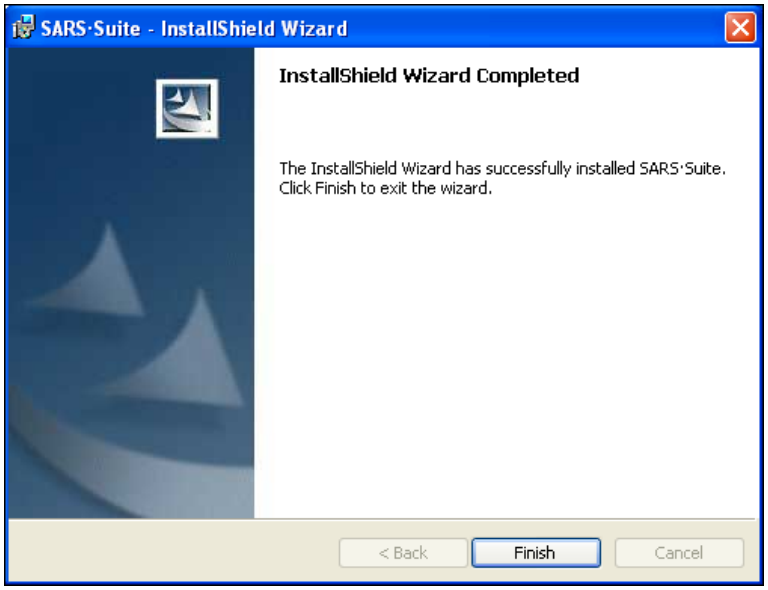
9. Click on NEXT to display the following screen:



10. Click on INSTALL (or on NEXT if the Custom Setup screen was used). The following progress screen will be displayed.



11. When the installation is completed, the following screen will be displayed:



12. Click on FINISH.

13. Repeat these steps for each Workstation used by individuals requiring access to SARS·GRID.

SECTION 3 — START AND CLOSE SARS·GRID

3.0 Overview

This Section is intended to help you gain access to, and properly exit from, the SARS·GRID application. You will need both a user name and a password. The System Administrator will provide you with a user name and an initial password. You can then change your password by following the steps in "How to Change a Password" in this Part, Section 3.2.

Periodically, your system will be automatically updated from the web. The changes to SARS·GRID will take effect on each PC when a user first signs on after the update.

3.1 Start and Close the Application

1. Double-click on the SARS·MENU icon. The log-on screen will be displayed. It looks like this.

Note
If the user has access to more than one database, a selection screen will first be displayed from which the user may select the desired database. After that selection, the Log-on screen will be displayed.

2. Type in your User Name and press ENTER.

3. Type in your Password and press ENTER or click on CONTINUE to display the SARS·MENU. The SARS·MENU looks like this:

Note
The SARS·MENU will show those programs to which you have access.

If you type an invalid User Name and/or Password, one of the following messages will appear:

-or-

4. Click on OK to return to the log-on screen. The cursor will be positioned at the invalid entry.

5. Re-type your valid User Name and/or Password and press ENTER or click on CONTINUE to display the SARS·MENU.

6. Click on the desired SARS program.

Tip
Leave the SARS·MENU active and minimized, if desired, so that you can use one program after another without requiring the log-on procedure each time.

---

7. To close a specific program, click on CLOSE or EXIT. Then, to completely leave the SARS application, click on EXIT on the SARS·MENU.

3.2 Change a Password

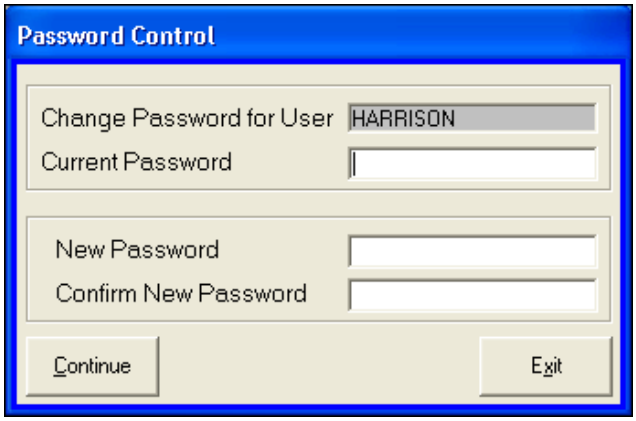
Only a user who has been granted SARS·UTIL – ACCESS and USER NAME MAINTENANCE access rights can assign a password. After a password is initially assigned, either the System Administrator or the user may change the password. The following instructions are for users who may wish to change their passwords themselves. To ensure greater security, passwords should consist of four or more characters.

1. Double-click on the SARS·MENU icon.

2. Type in your User Name and press ENTER.

3. Type *CHANGE* in PASSWORD and press ENTER. The PASSWORD CONTROL screen will appear.

It looks like this.



The following options will be displayed:

- CURRENT PASSWORD: Use to enter your current password.
- NEW PASSWORD: Use to establish a new password.
- CONFIRM NEW PASSWORD: Use to validate the password by typing a second time.

4. Type in your existing password in CURRENT PASSWORD and press ENTER. If you type an invalid password in CURRENT PASSWORD, an error message will appear:

   a. Click on OK to return to the PASSWORD CONTROL screen. The cursor will be positioned at CURRENT PASSWORD.

   b. Re-type your valid password and press ENTER.

5. Type in your new password in NEW PASSWORD and press ENTER.

6. Type your new password again in CONFIRM NEW PASSWORD in order to validate the spelling. Then press ENTER or click on CONTINUE to display the SARS·MENU. If the password you typed in CONFIRM NEW PASSWORD does not match that typed in NEW PASSWORD, the following message will appear:

   a. Click on OK to return to the PASSWORD CONTROL screen. The cursor will be positioned at NEW PASSWORD.

   b. Type your new password in NEW PASSWORD and press ENTER.

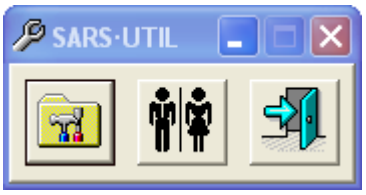
7. Re-type your new password in CONFIRM NEW PASSWORD and press ENTER or click on CONTINUE to display the SARS·MENU.

SECTION 4 — ENTER REQUIRED INFORMATION

4.0 Overview

In conjunction with the *WORKBOOK FOR ADMINISTRATORS*, this Part will assist the System Administrator in setting up SARS·GRID so that it is ready for use by schedulers and advisors. System Administrators also will reference this Part when performing administrative operations and managing the database. These tasks are located in the SYSTEM ADMINISTRATION and STUDENT MAINTENANCE components of UTIL, which is short for Utilities.

The SARS·UTIL tool bar is the main menu from which access is provided to all UTIL functions. It looks like this:



The following buttons appear on the tool bar from left to right:

- SYSTEM ADMINISTRATION: Use to control the functionality of the system.
- STUDENT MAINTENANCE: Use to modify information about an existing student, including the student's identifier, to add a new student, and to delete a student.
- EXIT: Use to exit the SARS·UTIL program.

When you click on the SYSTEM ADMINISTRATION button, a drop down menu appears.

The options available from the SYSTEM ADMINISTRATION menu are as follows:

- ID FORMAT MAINTENANCE: Use to add, change, or delete formats to be used for student identifiers.
- LOCATION MAINTENANCE: Use to segment THE GRID by department (for example, Advising Center, Counseling, Career Center, Assessment Center, and Disabled Student Services), to add, change information about, or delete those departments, and to gain access to screens used to establish most individualized settings for each department.
- SHORT NAME MAINTENANCE: Use to add or delete an advisor, to change information about an existing advisor; to make an advisor's name and schedule inactive; to designate the name for use in *e*·SARS; and to establish and print advisors' master schedules.

- USER NAME MAINTENANCE: Use to add, delete, or change information on a user. Also use to gain access to ACCESS CODE MAINTENANCE.
- eADVISING MAINTENANCE: Use to establish the webmail URL for the eAdvising module and to view, archive and delete eAdvising messages.

From the SARS·UTIL tool bar, you will click on SYSTEM ADMINISTRATION. When setting up an application, go to the SYSTEM ADMINISTRATION drop down menu and perform each task in the sequence described in this Section.

This Section guides the System Administrator in establishing the necessary options to run the SARS·GRID application. Certain tasks **must** initially be performed in a particular order, which is listed in the Initial Set-Up Steps table, below. The outline below describes all of the sections that are discussed.

4.1 ID FORMAT MAINTENANCE
- 4.1.1 Add an ID Format
- 4.1.2 Change an ID Format
- 4.1.3 Delete an ID Format

4.2 LOCATION MAINTENANCE (also see Initial Set-Up Steps in Table, below)
- 4.2.1 Add a Location Code
- 4.2.2 Change Information about a Location Code
- 4.2.3 Delete a Location Code

4.3 GRID SETTINGS (also see Initial Set-Up Steps in Table, below)
- 4.3.1 Establish Time Increment
- 4.3.2 Establish the Begin Date
- 4.3.3 Establish Start Time and Stop Times
- 4.3.4 Select Booked Appointment Codes
- 4.3.5 Generate Excluded Dates and Select Excluded Date Code
- 4.3.6 Select the Default Master Schedule Code
- 4.3.7 Specify Maximum Schedule Code Length
- 4.3.8 Include Saturday/Include Sunday
- 4.3.9 Establish Data View Size
- 4.3.10 Establish Split Grid in Half
- 4.3.11 Establish Cutoff Days and Select a Replacement Code

4.4 SCHEDULE CODES (also see Initial Set-Up Steps in Table, below)
- 4.4.1 Add a Schedule Code
- 4.4.2 Schedule Code Properties
- 4.4.3 Change Information about a Schedule Code
- 4.4.4 Delete a Schedule Code
- 4.4.5 Copy a Schedule Code from another Location
- 4.4.6 Archive a Schedule Code

4.5 MISCELLANEOUS SETTINGS –Specify the settings for the following parameters:
- 4.5.1 Enable Notification of Appointment Arrival
- 4.5.2 Enable Private Notes
- 4.5.3 Quick Day Change Miscellaneous Column
- 4.5.4 Allow Multiple Appointment Reasons
- 4.5.5 Require Appointment Reason
- 4.5.6 Show Term List
- 4.5.7 Use Short Name Assignments
- 4.5.8 Use Student Classes

Note about Terminology
Throughout these chapters, the word ADVISOR is used generically to describe any person who may have appointments and/or drop-in visits with students and has a Master Schedule in SARS·GRID. The System Administrator may establish a Short Name Label for each Location to more correctly identify the type of individual (e.g., Counselor, Tutor, Nurse, etc.).

To minimize the need to move back and forth between several screens during the initial setup, start out by following the steps in the Table, below.

INITIAL SET-UP STEPS

1. In ID Format (Section 4.1),
   a. Verify or setup the format to be used for student ID's.
   b. Click on SAVE (if new ID set up) and click on CLOSE.

2. LOCATION MAINTENANCE (Section 4.2),
   a. Click on Add and create a Location (e.g., Advising).
   b. Click on Save.
   c. Click on the new Location.
   d. Click on Properties.
   e. Click on the GRID Settings tab.

3. In GRID SETTINGS (Section 4.3),
   a. Select a Time Increment.
   b. Enter a Begin Date.
   c. Select a Start Time.
   d. Select a Stop Time.
   e. Do not click on OK. Instead, click on the Schedule Codes tab.

4. In SCHEDULE CODES (Section 4.4),
   a. Note that the pre-set Schedule Code for a booked appointment that has not yet had the attendance marked is BOOKED. If desired, rename that code. If no code is displayed, add a Schedule Code for the category.
   b. Note that the pre-set Schedule Code for an individual appointment that is marked as attended is SHOWED. If desired, rename that code. If no code is displayed, add a Schedule Code for the category.
   c. Note that the pre-set Schedule Code for an individual appointment that is marked as not attended is NOSHOW. If desired, rename that code. If no code is displayed, add a Schedule Code for the category.
   d. Create a Schedule Code for the Default Master Schedule Code (e.g. ////).
   e. [Optional] Create a Schedule Code for Excluded Dates (e.g. CLOSED).
   f. [Optional] Create a Schedule Code for a Replacement Code if using Cutoff Days (e.g., DROPIN).
   g. Do not click on OK. Instead, click on the GRID Settings tab.

5. IN GRID SETTINGS (Section 4.3),
   a. Complete the items on the screen.
   b. Do not click on OK. Instead, click on the MISCELLANEOUS SETTINGS tab.

6. In MISCELLANEOUS SETTINGS (Section 4.5),
   a. Complete the items on the screen.
   b. Click on OK.

.

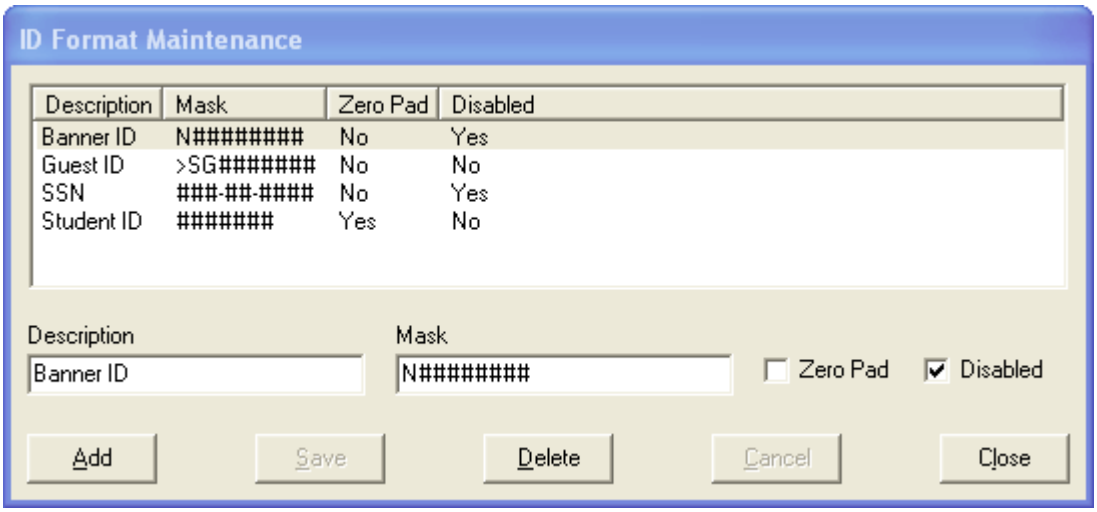
After completing the steps in Section 6, refer to "Create Master Schedules" and Section 7, "Add Schedules to THE GRID" in this Part. These steps must be completed when first setting up the system and every term thereafter.

After completing the steps in Sections 4, 6 and 7, the optional steps may be completed. These are outlined in this Part, Section 5, "Enter Optional Information."

4.1 ID Format Maintenance

The ID Format Maintenance screen is used to add, change, or delete a student ID description and format, or verify that the preset format is acceptable.

Here is an example of the screen layout.



The following options appear on this screen:

- DESCRIPTION: Use to enter the name or description of the ID format.
- MASK: Use to enter the type and sequence of characters that make up the ID format.
- ZERO PAD: [Applicable only if the ID Format is ALL NUMERIC] Use to have the system automatically insert zeros in front of any student ID that has fewer digits than the total required by the ID Format.
- DISABLED: Use to render a selected ID Format unavailable for use without deleting it.
- ADD: Use to make fields available to enter new data.
- SAVE: Use to save new entries or changes made on the screen.
- DELETE: Use to remove data.
- CANCEL: Use to terminate the action without saving.
- CLOSE: Use to exit the screen.

4.1.1 Add an ID Format

SARS·GRID is pre-set with two ID formats: Student ID and Guest ID. Guest ID is a temporary ID that is issued by SARS·GRID during the appointment or drop-in process to an individual who does not have a school identifier. A unique Guest ID will be inserted in the ID field for that individual with **SG** as the leading characters.

ID Format Maintenance is used in the following circumstances:

- If the pre-set description or mask format needs to be changed
- If additional ID formats need to be added

To simply change an existing ID description or mask format, see Section 4.1.2 below. To establish a new ID format, follow the steps below:

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on ID FORMAT MAINTENANCE.
4. Click on ADD.
5. Type in a description of the ID format. The field will accept up to 50 characters.
6. In the MASK field, enter the type and sequence of characters contained in the ID format to be used.

   The options for masks and their descriptions are listed below:

#	Digit placeholder
.	Decimal placeholder
,	Thousands separator
:	Time separator
/	Date separator
\	Treat the next character in the mask string as a literal. This allows you to include the '#', '&', 'A', and '?' characters in the mask.
&	Character placeholder (Holds any character that can be entered from the keyboard.)
>	Convert all the characters that follow to uppercase.
<	Convert all the characters that follow to lowercase.
A	Alphanumeric character placeholder (entry required). For example: a-z, A-Z, or 0-9.
a	Alphanumeric character placeholder (entry optional)
9	Digit placeholder (entry optional). For example: 0-9.
C	Character or space placeholder (entry optional)
?	Letter placeholder. For example: a-z or A-Z
Literal	All other symbols are displayed as literals; that is, as themselves.

Source: Microsoft®

7. [Applicable only if the ID Format is ALL NUMERIC] If desired, click on the ZERO PAD to have the system automatically insert zeros in front of any student identifier that has fewer digits than the total required by the ID Format.

8. Click on SAVE.

9. Click on CLOSE. You will be selecting the desired ID format as the primary ID on the Miscellaneous Settings screen (see Section 4.5 in this Part).

4.1.2 Change an ID Format

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on ID FORMAT MAINTENANCE.

4. Click on the selected ID in the box listing Description, Mask, Zero Pad and Disabled. The existing information for those fields will appear in the boxes below.

5. Enter the desired changes.

Note
An ID Format that is being used as the Primary ID Format in one or more Location(s) cannot be disabled. The Primary ID formats for that location would first need to be changed in Location Maintenance on the Miscellaneous Settings screen (see Section 4.5 in this Part).

6. Click on SAVE.

7. Click on CLOSE.

4.1.3 Delete an ID Format

You may not delete an ID Format when any student has an ID of that type in the database. If you must delete an ID Format that has been in use, contact SSPI for assistance.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on ID FORMAT MAINTENANCE.

4. Click on the selected ID in the box listing Description, Mask, Zero Pad and Disabled. The existing information for those fields will appear in the boxes below.

5. Click on DELETE. A confirmation message will be displayed.

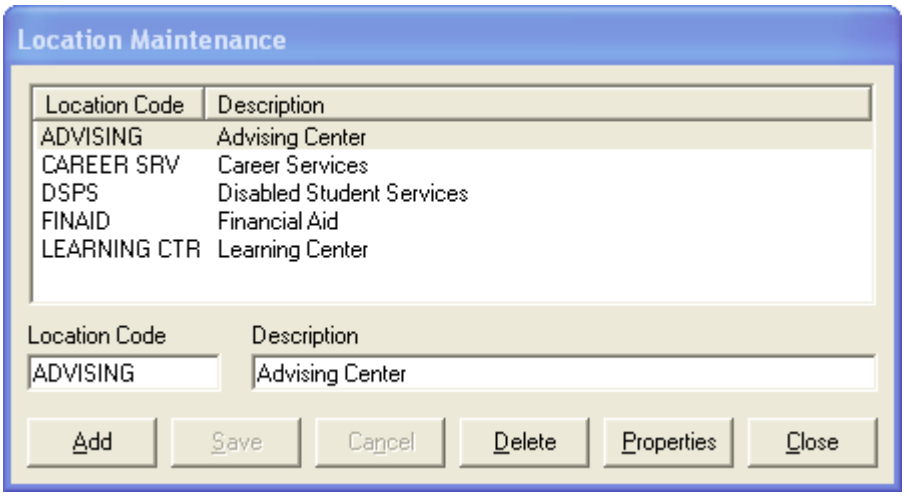
6. Click on YES to confirm the deletion.

7. Click on CLOSE.

4.2 Location Maintenance

The Location Maintenance screen is used to segment THE GRID by department (for example, Assessment Center, Career Center, Advising Center, Counseling Center, and Transfer Center), to add, change information about, or delete those departments, and to gain access to screens used to establish most individualized settings for each department.

Here is an example of the initial screen layout.



The following options appear on this screen:

- LOCATION CODE: Use to segment THE GRID by department (for example, Advising Center, Counseling Center, Career Center, Assessment Center, and Transfer Center).
- DESCRIPTION: Use to enter a more complete description of the Location Code.
- ADD: Use to make fields available to enter new data.
- SAVE: Use to save new entries or changes made on the screen.
- CANCEL: Use to terminate the action without saving.
- DELETE: Use to remove data.
- PROPERTIES: Use to gain access to the Location Properties sub-screens that are used to specify the settings for various parameters unique to each Location.
- CLOSE: Use to exit the screen.

4.2.1 Add a Location Code

The SARS·GRID software is provided with the following four pre-established settings:

- One Location Code = ADVISING
- One Access Code = ADMIN
- One User Name = SSPI
- One User Name Password = ADMIN

These initial settings allow the System Administrator to set up the system without risk of being locked out while performing the set-up functions.

A separate Location must be created for each department that will be using SARS·GRID. Each Location may establish its own properties, including GRID settings, Schedule Codes and Properties, Reason Codes, Excluded Dates, Additional Information settings, Miscellaneous settings, and Database settings. Only users who are specifically assigned to a Location will be able to have access to that Location.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on ADD.

5. Click on the LOCATION CODE field; then type in the abbreviation to represent the category of advisors. The field will accept up to 20 characters (for example, ADVISING).

6. Click on the DESCRIPTION field; then type in a more complete description of the Location Code (for example, Advising Center). The field will accept up to 50 characters.

7. Click on SAVE.

8. To continue with the initial set-up for this Location,

   a. Click on the Location.

   b. Click on PROPERTIES.

   c. Click on the GRID SETTINGS tab. (See “GRID Settings” at Section 4.3 in this Part.)

4.2.2 Change Information about a Location

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the selected code in the box listing LOCATION CODE and DESCRIPTION. The existing information for those fields will appear in the boxes below.

5. Type in the applicable change to the LOCATION CODE and/or to the DESCRIPTION field.

6. Click on SAVE.

7. Click on CLOSE.

4.2.3 Delete a Location Code

Warning
A Location Code should be deleted only if no data exists for that Location on THE GRID. If a Location is deleted that does contain data, that Location Code and its associated data will be hidden (but not entirely deleted) from THE GRID. Once a Location Code has been deleted, it cannot be used again, unless it is restored with all of its previous data. Otherwise, a different Location Code name will need to be created.

If the user's Primary Location is to be deleted, assign a new Primary Location to the user before taking this action. Otherwise, the user can be locked out of the system.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the selected code in the box listing LOCATION CODE and DESCRIPTION. The existing information for those fields will appear in the boxes below.

5. Click on DELETE. A confirmation message will be displayed.

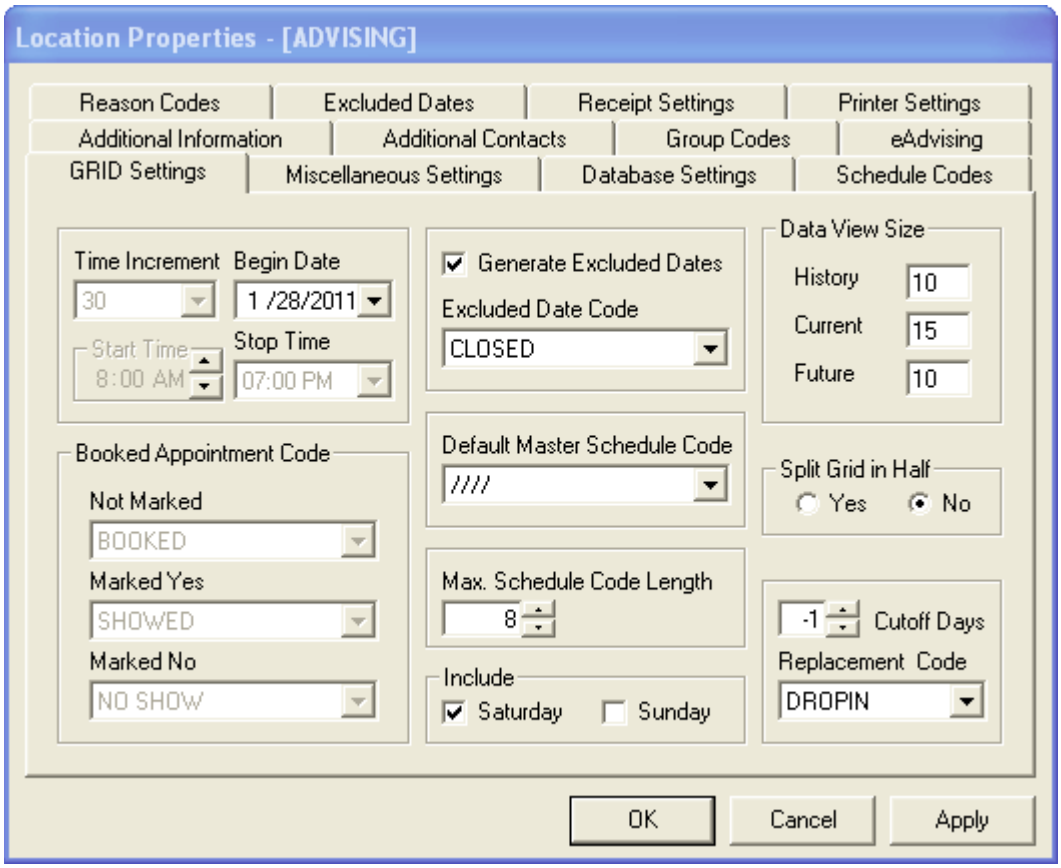
6. Click on YES to confirm the deletion.

7. Click on CLOSE.

4.3 GRID Settings

The GRID Settings screen is used to establish or change a variety of settings (see the screen layout below), which affect the appearance and size of THE GRID and MY GRID, the manner in which information will be visually presented on THE GRID, and the options that will be available for use. GRID settings must be created for each separate Location.

Here is an example of the screen layout.



The following options appear on this screen:

- TIME INCREMENT: Use to establish the shortest length of time allotted to <u>any</u> activity.
- BEGIN DATE: Use to establish the <u>earliest</u> date for which student history will be displayed on the Student History screen. This field functions to filter out old student history that need not be displayed.
- START TIME: Use to establish the earliest time of the day for which an appointment may be scheduled or an activity recorded.
- STOP TIME: Use to establish the <u>end</u> of the last appointment for the day or the last activity to be recorded.

- BOOKED APPOINTMENT CODE: Use to select Schedule Codes to designate the attendance status of individual appointments.

  - NOT MARKED: Use to display the Schedule Code that represents individual appointments for which attendance has not been marked. The field will be disabled once a schedule has been added to THE GRID.

  - MARKED YES: Use to display the Schedule Code that represents individual appointments which have been marked as attended. The field will be disabled once a schedule has been added to THE GRID.

  - MARKED NO: Use to display the Schedule Code that represents individual appointments that have been marked as not attended. The field will be disabled once a schedule has been added to THE GRID.

- GENERATE EXCLUDED DATES: Use to display on THE GRID all days that will be excluded from scheduling (for example, holidays and college breaks).

  - EXCLUDED DATE CODE: Use to pick a Schedule Code that represents dates for which appointments cannot be made.

- DEFAULT MASTER SCHEDULE CODE: Use to select the Schedule Code to be inserted initially in all time slots for an advisor's Master Schedule.

- MAX SCHEDULE CODE LENGTH: Use to specify the maximum number of characters to be allowed for Schedule Codes. The greater the number of characters, the wider the columns on THE GRID.

- INCLUDE: Use to add Saturday and/or Sunday to THE GRID.

  - SATURDAY: Use to add Saturday to THE GRID.

  - SUNDAY: Use to add Sunday to THE GRID.

- DATA VIEW SIZE: Use to establish the number of days available for viewing in each of the three Data Views.

  - HISTORY: Use to establish the number of days to be displayed on THE GRID at any one time. The default is 15.

  - CURRENT: Use to delimit the total number of days readily available for scheduling. The default is 10.

  - FUTURE: Use to establish the number of days to be displayed on THE GRID at any one time. The default is 15.

- SPLIT GRID IN HALF: Use to divide the GRID into two parts (recommended if using a time increment of less than 30 minutes) to avoid the necessity to scroll.

- CUTOFF DAYS: Use to specify the number of days (for example, 2 or fewer) after which the Replacement Code will be assigned to a cancelled appointment cell.

  REPLACEMENT CODE: Use to select the Schedule Code to be inserted in a cell for which an appointment is cancelled after the cutoff.

- OK: Use to save entries or changes and close the LOCATION PROPERTIES screen.

- CANCEL: Use to cancel the actions without saving.

- APPLY: Use to save entries or changes without closing the LOCATION PROPERTIES screen.

4.3.1 Establish Time Increment

Most colleges select 30 minutes for their default time increment, as this is typically the shortest time span for an activity. Appointment time increments can easily be extended. The time increment does not apply to drop-ins scheduled on the STUDENT DROP-IN SCREEN.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES to display the LOCATION PROPERTIES screen.
6. Click on GRID SETTINGS tab.
7. Click on TIME INCREMENT ▼.
8. Select the length of the time slot in minutes. The options are:

   10
   15
   20
   30
   45
   60

Warning
You cannot change the Time Increment <u>after</u> you have added a Master Schedule to THE GRID. If you need to change the Time Increment, contact SARS Software Products, Inc.

4.3.2 Establish the Begin Date

The Begin Date is the earliest date for which student history should be displayed on the Student History screen.

Click on the BEGIN DATE field and type in (or click on ▼ to use the Date Picker) the earliest date for which student history should be displayed. (See "Date Picker" in Appendix B.)

4.3.3 Establish Start and Stop Times

The Start and Stop Times must encompass the longest workday during the year. The Start Time should be the earliest time of the day for which an appointment may be scheduled or an activity recorded. The Stop Time should be the end of the last appointment for the day or the last activity to be recorded.

1. In the START TIME field, select the earliest time to be displayed on the schedule for this Location. To do this,

   a. Click on the number(s) representing the hour and then click on ▲ to increase or on ▼ to decrease the hour.

   b. Click on the numbers representing the minutes and then click on ▲ to increase or on ▼ to decrease the minutes.

   c. Click on the AM or PM designation and then click on ▲ or on ▼ to change.

2. Click on STOP TIME ▼ and select the time for the end of the day.

Warning
After a Master Schedule has been added to THE GRID, the Start Time or Stop Time can only be changed by SARS Software Products, Inc. Note that a day may be made longer, but it cannot be shortened.

4.3.4 Select Booked Appointment Codes

Three Schedule Codes must first be created in Schedule Code Maintenance to represent the following three situations: a code for booked appointments for which attendance has not yet been marked, a code for booked appointments for which attendance has been marked as "yes," and a code for booked appointments for which attendance has been marked as "no." (See "Add a Schedule Code" in this Part, Section 4.4.1). Create those three Schedules Codes; then return to the GRID SETTINGS screen and proceed with the instructions listed below. These codes must be established, even if the college does not intend to use them.

1. Click on NOT MARKED ▼ and then select the code to be used to designate a booked appointment for which attendance has not yet been marked.

2. Click on MARKED YES ▼ and then select the code to be used to designate a booked appointment for which attendance has been marked as "Yes."

3. Click on MARKED NO ▼ and then select the code to be used to designate a booked appointment for which attendance has been marked as "No."

Notes
Once appointments have been booked on THE GRID, the fields for the BOOKED APPOINTMENT CODES are disabled. If different codes are desired to represent these situations, they may only be changed by renaming them. (See "Change Information about a Schedule Code" in this Part, Section 4.4.3.)

If the Schedule Code(s) you created for use as BOOKED APPOINTMENT CODES are not shown on the drop-down menu, it may be because you assigned those codes a Duration that differs from the default Time Increment established on the GRID SETTINGS screen (see "Establish Time Increment" in this Part, Section 4.3.1.) Return to the SCHEDULE CODES screen, select the code, click on PROPERTIES, and re-set the Duration to match the Time Increment.

4.3.5 Generate Excluded Dates and Select Excluded Date Code

Enter dates that will be excluded from scheduling (e.g. holidays and college breaks) on Excluded Date Maintenance **before** adding schedules to THE GRID. We recommend that the Excluded Date Code be set as CLOSED. To create an Excluded Date Code, see "Add a Schedule Code" in this Part, Section 4.4.1). Then return to the GRID SETTINGS screen and proceed with the instructions listed below.

1. If desired, click on the GENERATE EXCLUDED DATE checkbox to include Excluded Dates when adding to the GRID. Upon checking GENERATE EXCLUDED DATE, the EXCLUDED DATE CODE field will appear.

2. Click on EXCLUDED DATE CODE ▼ to display a list of Schedule Codes.

3. Click on the selected option from the list.

Note
If the Schedule Code you created for use as the EXCLUDED DATE CODE is not shown on the drop-down menu, it may be because you assigned the code a duration that differs from the default time increment established on the GRID SETTINGS screen (see "Establish Time Increment" in this part, Section 4.3.1.) Return to the SCHEDULE CODES screen, select the code, click on PROPERTIES, and re-set the Duration to match the Time Increment.

4.3.6 Select the Default Master Schedule Code

A Schedule Code must first be created in Schedule Code Maintenance to be inserted initially for use in all time slots on a Master Schedule. The Code //// is recommended. To create a Default Master Schedule Code, see "Add a Schedule Code" in this Part, Section 4.4.1. After creating the desired Schedule Code, return to the GRID SETTINGS screen and follow the steps below to select a code for this Location.

1. Click on DEFAULT MASTER SCHEDULE CODE ▼ to display a list of Schedule Codes.

2. Click on the selected option.

Note
If the Schedule Code you created for use as the DEFAULT MASTER SCHEDULE CODE is not shown on the drop-down menu, it may be because you assigned the code a duration that differs from the default time increment established on the GRID SETTINGS screen (see "Establish Time Increment" in this part, Section 4.3.1.) Return to the SCHEDULE CODES screen, select the code, click on PROPERTIES, and re-set the Duration to match the Time Increment.

4.3.7 Specify Maximum Schedule Code Length

The Maximum Schedule Code Length sets the width of columns on THE GRID and is pre-set to eight characters. Eight characters is the ideal size for maximizing the number of columns that are visible on THE GRID without scrolling. If this setting is acceptable, skip to the next section. To change this setting, follow the steps below.

1. Click on ▲ to increase, or on ▼ to decrease MAX SCHEDULE CODE LENGTH.

2. Select the maximum length. The range is from 1 to 20 characters. This setting will determine the width of every column on THE GRID.

Note
The Maximum Schedule Code Length may affect the number of characters in an advisor Short Name that can be displayed at the top of a column. (For more information, see "Add an Advisor" in Short Name Maintenance at Section 4.7.1 in this Part.)

4.3.8 Include Saturday/Include Sunday

Master Schedules will display only Monday through Friday, unless this option is selected. Only select this option if Saturdays and/or Sundays are frequent, recurring workdays. (To include an occasional Saturday or Sunday, see "Add an Occasional Saturday or Sunday" in Part II, Section 7.2).

If desired, click on the INCLUDE SATURDAY and/or INCLUDE SUNDAY checkbox to include Saturday and/or Sunday. The included days will be displayed on the Master Schedule, but will not be displayed on the GRID until the Master Schedule has been added to the GRID.

4.3.9 Establish Data View Size

The number of days that will be made available for viewing at one time must be established for each of the three data views: History, Current, and Future. Locations typically establish 10 days (two weeks) for the Current Data View. For easiest viewing in History and Future Data Views, it is recommended that Locations enter the number of days that matches the number of columns on THE GRID that are immediately viewable to schedulers.

1. In the DATA VIEW SIZE option, click on CURRENT. The number of days defaults to 10. To change, type in the number of days. The typical range is 5 - 15 days. (The number for Current Data View should be the total number of days typically available for scheduling.)

2. Click on HISTORY. The number of days defaults to 10. To change, type in the number of days. The typical range is 7 - 13 days. (To view a date on THE GRID that is outside the selected range, a Previous and Next option will be available.)

3. Click on FUTURE. The number of days defaults to 10. To change, type in the number of days. The typical range is 7 - 13 days. (To view a date on THE GRID that is outside the selected range, a Previous and Next option will be available.)

Note
Data View Size does not include Saturday or Sunday or Excluded Dates unless those options have been selected.

4.3.10 Establish Split Grid in Half

A typical 30-minute Time Increment permits an entire day to be viewed on THE GRID without the need to scroll. The SPLIT THE GRID IN HALF option is recommended if Time Increment is less than 30 minutes. Once this option is established, the **F10** key is used to toggle between two parts of the GRID screens. To split the GRID in half, follow the steps below:

1. Click on the selected option inside the SPLIT GRID IN HALF box.

2. Click on YES to split THE GRID into two parts.

4.3.11 Establish Cutoff Days and Select a Replacement Code

The CUTOFF DAYS field is pre-set to 0. Most Locations maintain this setting so that a cancelled appointment slot becomes available for another student. If this setting is acceptable, skip to the next section.

If a Location chooses to establish a Cutoff Day other than 0, a Schedule Code to represent the Replacement Code must be created in Schedule Code Maintenance (see "Add a Schedule Code" in this Part, Section 4.4.1). Locations that change the default setting typically select the option –1 (minus one, or less than one calendar day) and also select the replacement code DROPIN. After creating the desired Schedule Code, return to the GRID SETTINGS screen and follow the steps below.

1. In the CUTOFF DAYS field, click on ▲ to increase, or on ▼ to decrease, the number of CUTOFF DAYS. Cutoff Days defaults to zero. (In this case, no Replacement Code is needed.)

2. If the value of Cutoff Days is not zero, the REPLACEMENT CODE field will appear. Click on REPLACEMENT CODE ▼ to display a list of Schedule Codes. Then click on the selected code (e.g., DROPIN). The GRID SETTINGS screen should now be complete.

   Note
   If the Schedule Code you created for use as the REPLACEMENT CODE is not shown on the drop-down menu, it may be because you assigned the code a duration that differs from the default time increment established on the GRID SETTINGS screen (see "Establish Time Increment" in this part, Section 4.3.1.) Return to the SCHEDULE CODES screen, select the code, click on PROPERTIES, and re-set the Duration to match the Time Increment.

3. To continue with the initial set-up for this Location, do not click on OK. Instead, click on APPLY. Then, click on the SCHEDULE CODES tab (see "Schedule Codes" at Section 4.4 in this Part).

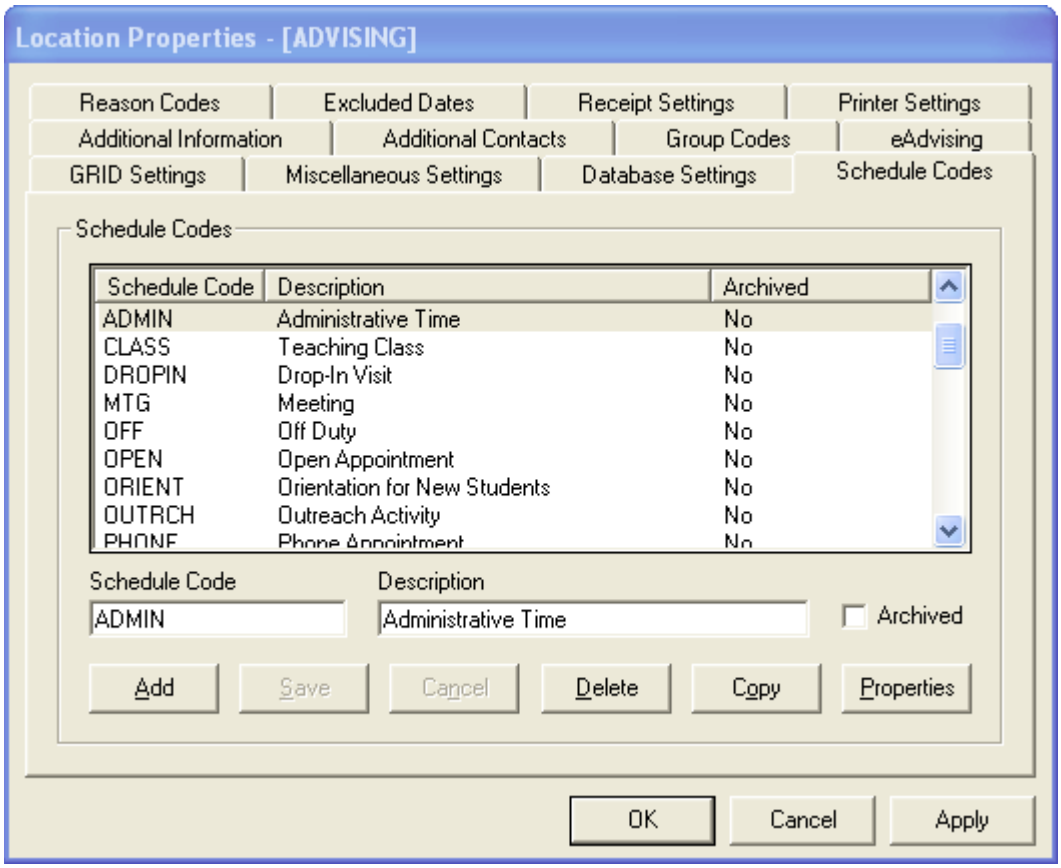
   -or-

4. To save any changes to GRID SETTINGS at any time after the initial set-up, click on OK to save the changes and return to LOCATION MAINTENANCE.

4.4 Schedule Codes

The Schedule Codes screen is used to add, delete or change codes that represent various activities to be placed in advisors' work schedules. It is also used to gain access to the Schedule Code Properties screen to establish the unique properties of Schedule Codes, including Allow Appointment, Maximum Students Allowed, Print Receipt Default, Email Receipt Default, Pull File Default, Default Attendance, Require Initials, Meeting Maker, Duration, Display Style, Prevent Master Schedule Overwrite, Clear Reasons and Groups.

Here is an example of the screen layout.



The following options appear on this screen:

- SCHEDULE CODE: Use to symbolize the activity in which the advisor will be engaged during the specific date and time represented by the cell on THE GRID and MY GRID.
- DESCRIPTION: Use to enter a more complete description of the Schedule Code.
- ARCHIVED: Use to archive an unneeded Schedule Code to reduce clutter.
- ADD: Use to make fields available to enter new data.

- SAVE: Use to save new entries or changes made on the screen.
- CANCEL: [SCHEDULE CODES screen] Use to terminate the action without saving.
- DELETE: Use to remove data.
- COPY: Use to transfer one or more Schedule Codes from one Location to another Location for its use.
- PROPERTIES: Use to gain access to the SCHEDULE CODE PROPERTIES screen.
- OK: Use to save entries or changes and close the LOCATION PROPERTIES screen.
- CANCEL: [LOCATION PROPERTIES screen] Use to terminate the action without saving.
- APPLY: Use to save entries or changes without closing the LOCATION PROPERTIES screen.

4.4.1 Add a Schedule Code

Schedules Codes symbolize the activity in which the advisor will be engaged during a specific date and time represented by a cell on THE GRID and MY GRID (the individual advisors' Grids).

The following Schedule Codes are required, and they must have the same duration assigned to them as the Time Increment established in GRID SETTINGS:

- A Default Master Schedule Code to be displayed in any appointment cell for which no other Schedule Code has been entered (e.g., ////).
- A code to represent a booked individual appointment for which attendance has not yet been marked (e.g., BOOKED).
- A code to represent an individual appointment that was marked as attended (e.g., SHOWED).
- A code to represent an individual appointment that was marked as not attended (e.g., NOSHOW).

The following Schedule Codes are not required, but if they are used, they must have the same duration assigned to them as the Time Increment established in GRID SETTINGS:

- A code to represent when the office is closed so that holidays may be displayed on THE GRID (e.g., CLOSED).
- [If CUTOFF DAYS has been established to require a replacement code] A code that will be inserted in a cell for which an appointment is cancelled after the cutoff (e.g. DROPIN).

The following types of Schedule Codes are optional, but recommended:

- One or more codes to indicate that the cell is available for scheduling an individual appointment (e.g., ****). A code is REQUIRED if individual appointments will be scheduled.
- One or more codes to represent appointments that may be booked for multiple students (e.g., ORIENT, TEST).
- One or more codes to represent non-appointment allowable time slots (e.g., MTG, CLASS, CONF, LUNCH, MEDICL, PREP, TRVL).

Note
The words RESERV, CPYING, and MOVING may not be used as Schedule Codes.

To add a Schedule Code, follow the steps below:

1. First check to see whether Schedule Codes have been created for another Location. If so, they may be copied to this Location, eliminating the need for duplicate efforts. (See "Copy a Schedule Code from another Location" at Section 4.4.5 in this Section.)
2. If additional Schedule Codes need to be added, click on UTIL on the SARS·MENU.
3. Click on SYSTEM ADMINISTRATION.
4. Click on LOCATION MAINTENANCE.
5. Click on the desired Location.
6. Click on PROPERTIES.
7. Click on the SCHEDULE CODES tab.
8. Click on ADD.
9. Click on SCHEDULE CODE; then type in the code to be used in scheduling. The field will accept up to 20 characters (for example, CONF). The maximum number of characters is controlled by the MAXIMUM SCHEDULE CODE LENGTH selected on the GRID SETTINGS tab (see "Specify Maximum Schedule Code Length" in this Part, Section 4.3.7).

   Tip
   A maximum of eight characters is the ideal code length for maximizing the number of columns that are visible on THE GRID without scrolling.

10. Click on SCHEDULE CODE DESCRIPTION; then type in the description of the code to be used in scheduling. The field will accept up to 50 characters.
11. Click on SAVE.
12. Repeat steps 8 – 11 to add other Schedule Codes.
13. Click on PROPERTIES to select the various properties to be associated with each Schedule Code (see "Schedule Code Properties" at Section 4.4.2 in this Part).

-or-

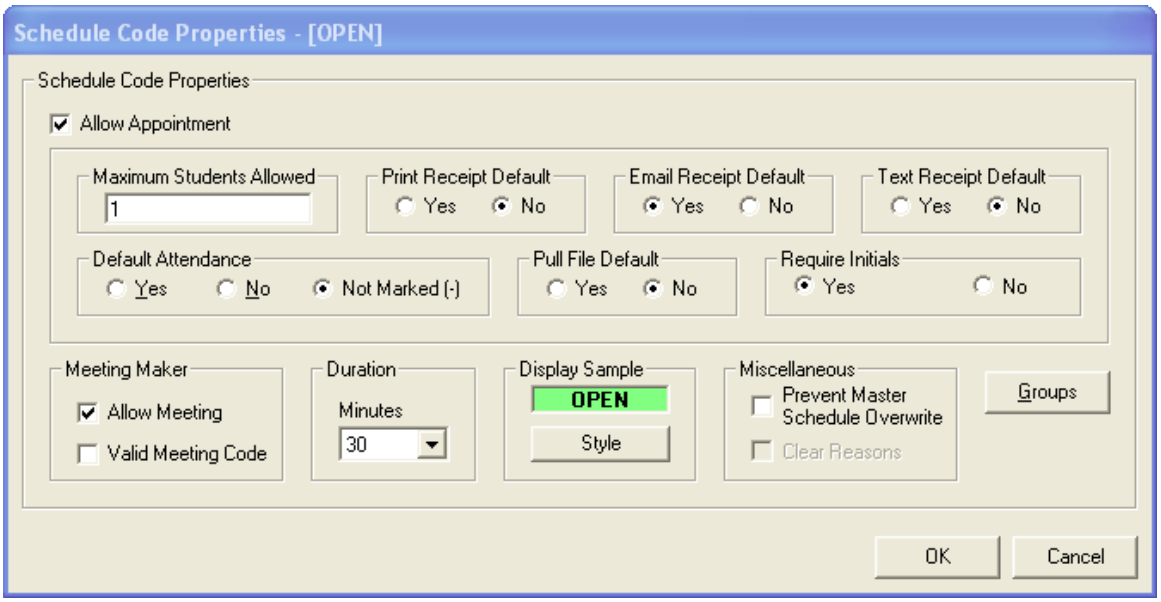
14. To continue with the initial set-up for this Location, do not click on OK. Instead, click on APPLY, and then click on the MISCELLANEOUS SETTINGS tab (see "Miscellaneous Settings" at Section 4.5 in this Part.).

4.4.2 Schedule Code Properties

The Schedule Code Properties screen is used to establish the unique properties of Schedule Codes, including Allow Appointment, Maximum Students Allowed, Print Receipt Default, Email Receipt Default, Pull File Default, Default Attendance, Require Initials, Meeting Maker, Duration, Display Style, Prevent Master Schedule Overwrite, Clear Reasons, and Groups.

Each Schedule Code for a Location must have properties assigned to it. In addition, if one or more Schedule Codes was copied to the Location from another Location, the properties for each of those codes may be individualized for the new Location.

Here is an example of the screen layout.



The options are:

- ALLOW APPOINTMENT: Use to designate whether the Schedule Code will allow for an appointment to be placed in the cell where it resides.
- MAXIMUM STUDENTS ALLOWED: Use to establish the total number of students that may be scheduled for a specific type of appointment.
- PRINT RECEIPT DEFAULT: Use to establish whether the PRINT RECEIPT field on the STUDENT APPOINTMENT screen will initially be displayed as checked or unchecked.

- EMAIL RECEIPT DEFAULT: Use to establish whether the Email Receipt field on the STUDENT APPOINTMENT screen will initially be displayed as checked or unchecked.

- TEXT RECEIPT DEFAULT: [Available only if the college has a valid license for text messaging and also only with respect to appointment-allowable Schedule Codes] Use to establish whether the Text Receipt field on the STUDENT APPOINTMENT screen will initially be displayed as checked or unchecked. YES must be selected to have the system automatically send a text receipt to students when an appointment is committed, cancelled or moved without the scheduler having to take any other action. In addition, the Open appointment schedule code(s) and the Booked appointment schedule codes must have Text Receipt selected on the Schedule Codes Properties screen. Text receipts cannot be re-sent.

- DEFAULT ATTENDANCE: Use to establish whether the initial attendance status will start out as YES (attended), NO (did not attend), or NOT MARKED (attendance not yet recorded).

- PULL FILE DEFAULT: Use to establish whether the PULL FILE field on the STUDENT APPOINTMENT screen will initially be displayed as checked or unchecked.

- REQUIRE INITIALS: Use to establish whether the identity of the person committing, canceling, copying, or moving an appointment must be entered. The default for this option is YES.

- MEETING MAKER: Use to assign meeting-related properties to a Schedule Code.

  - ALLOW MEETING: Use to designate whether the Schedule Code may be superceded by a valid meeting code when scheduling a meeting using SARS·MEETING MAKER.

  - VALID MEETING CODE: Use to identify whether the Schedule Code may be used by SARS·MEETING MAKER to designate a scheduled meeting.

- DURATION: Use to select the total time for the activity. (The three Booked Appointment Codes, the Excluded Date Code, the Default Master Schedule Code, and the Cutoff Days Replacement Code must be assigned the same duration as the Time Increment established on the GRID SETTINGS screen.)

- DISPLAY SAMPLE: Use to show the selected background color and font color and appearance (**Bold** or *Italic*) for the selected Schedule Code.

  - STYLE: Use to activate the CODE DISPLAY STYLE screen to establish cell and font color and style settings.

- MISCELLANEOUS:

  PREVENT MASTER SCHEDULE OVERWRITE: Use for all types of Schedule Codes that should not inadvertently be overwritten (e.g., Meeting). Use to retain any Schedule Code that exists on THE GRID when re-adding a Master Schedule within the designated date range.

  CLEAR REASONS: Use to de-select all reasons when booking students into a group appointment, each with different reasons. This will prevent inadvertent inclusion of unwanted reasons when booking multiple students into a group appointment during the same scheduling session.

- GROUPS: Use to link the selected Schedule Code to a Group Code for reporting purposes. (See Part I, Section 5.3.6)

- OK: Use to save entries and close the screen.

- CANCEL: Use to terminate the action without saving.

1. On the SCHEDULE CODES screen, click on the desired Schedule Code.

2. Click on PROPERTIES.

3. Click on ALLOW APPOINTMENT if the code is an appointment-allowable code. This action will enable five more options.

   a. In the MAXIMUM STUDENTS ALLOWED field, type in the total number of students allowed per appointment. The largest number that can be entered in this field is 999. The default is 1.

   b. In PRINT RECEIPT DEFAULT, click on YES to activate the PRINT RECEIPT field on the STUDENT APPOINTMENT screen. Receipts will be printed automatically when appointments are made, unless the option is de-selected when making an appointment. To set the PRINT RECEIPT DEFAULT to not print when making an appointment, click on NO. (If NO is selected, the PRINT RECEIPT option may be selected manually when making an appointment.)

   c. In EMAIL RECEIPT DEFAULT, click on YES to activate the EMAIL RECEIPT field on the STUDENT APPOINTMENT screen. Receipts will be emailed automatically when appointments are made, unless the option is de-selected when making an appointment. To set the EMAIL RECEIPT DEFAULT to not send an email receipt when making an appointment, click on NO. (If NO is selected, the EMAIL RECEIPT option may be selected manually when making an appointment.) Email receipts cannot be re-sent.

   d. [For appointment-allowable Schedule Codes, and if the college has a valid license for text messaging] In TEXT RECEIPT DEFAULT, click on YES to activate the TEXT RECEIPT field on the STUDENT APPOINTMENT screen. Receipts will be sent via text messaging automatically when appointments are committed, cancelled, moved, or copied, unless the option is de-selected when making an appointment. To set the TEXT RECEIPT DEFAULT to not send a text receipt when making an appointment, click on NO. (If NO is selected, automatic text receipts are not sent when appointments are committed, cancelled, moved, or copied; however, the scheduler may still select that option manually. In addition, the Open appointment schedule code(s) and the Booked

appointment schedule codes must have Text Receipt selected on the Schedule Codes Properties screen. Text receipts cannot be re-sent.

e. In PULL FILE DEFAULT, click on YES to establish that the initial setting on the STUDENT APPOINTMENT screen will be to pull the student's file. (With this option, all appointments will be shown on the "All Appointments for a Day Report" as requiring files to be pulled. If a file is not needed, the PULL FILE field on the STUDENT APPOINTMENT screen must be unchecked manually at the time the appointment is made. Otherwise, click on NO.

f. In the DEFAULT ATTENDANCE field, click on one of the three options to establish the initial setting for student attendance for the selected Schedule Code. If YES is selected, the student will be automatically recorded as having attended the appointment. Non-attendance must be changed manually. If No is selected, the student will be automatically recorded as not having attended the appointment. If the student did attend the appointment, the attendance status must be changed manually. If NOT MARKED is selected, all attendance must be recorded manually. (See "Appointment Attendance" in Part IV, Section 20.)

Warning
We strongly recommend that NOT MARKED be selected as the default attendance status. Selecting the default settings YES or NO can easily result in incorrect attendance statistics because users are more likely to forget to correct attendance status when it is already marked.

g. In the REQUIRE INITIALS field, note that the YES option is checked. This option will require that the person committing, canceling, copying, or moving an appointment "sign" with his or her initials. If initials will not be required, click on NO.

Note
If REQUIRE INITIALS is activated, the initials of the user taking the action will be recorded on the STUDENT HISTORY screen under User Entry Information. If REQUIRE INITIALS is not activated, the log-on user name will be recorded in that field. Remember that REQUIRE INITIALS must be selected individually for each appointment-allowable Schedule Code, if desired.

4. [Optional] The MEETING MAKER fields are provided for colleges that will be using the Meeting Maker program in SARS·GRID to find available times for meetings.

   a. Click on the ALLOW MEETING checkbox to designate the Schedule Code as one that can be superceded by a valid meeting code when scheduling a meeting.

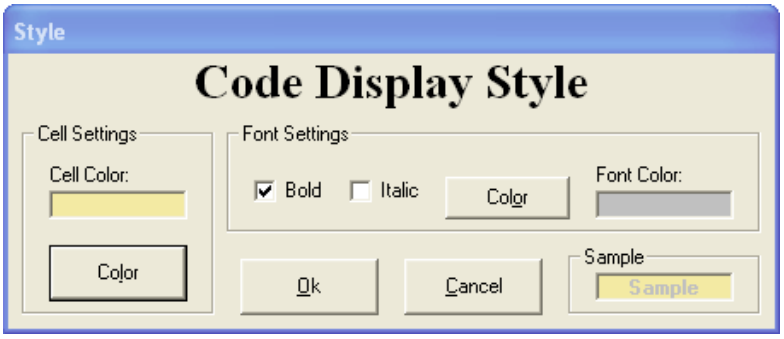
   -or-

   b. Click on the VALID MEETING CODE checkbox to identify the Schedule Code as a type of meeting.

5. Click on DURATION ▼ and then select the number of minutes that represents the total time for the activity. The default duration is the same as the TIME INCREMENT established in GRID SETTINGS.

Tip
Certain Group Appointment Schedule Codes may typically have longer durations than the default time duration. For example, Workshop sessions may be one to two hours in length. It is recommended that those Group Appointment Schedule Codes that vary in duration be assigned the shortest likely duration (e.g., one hour). They can then be extended as needed using the Command Menu on THE GRID. Be aware that in order to later extend a group activity the time slots that follow it must be appointment allowable.

6. Click on STYLE. The following screen will appear.



The options are:

- CELL SETTINGS: Use to assign cell display properties to the Schedule Code.
  - COLOR: Use to establish the background color for a cell.
- FONT SETTINGS: Use to assign font display properties to the Schedule Code.
  - BOLD: Use to make the text bold.
  - ITALIC: Use to make the text italic.
  - COLOR: Use to establish the color of the words/numbers contained in a cell.
- OK: Use to approve the change.
- CANCEL: Use to terminate the action without saving.

7. For Cell Settings:

   a. Click on COLOR to display the COLOR screen. Then click on the desired color from the palette of BASIC COLORS.

   -or-

   b. Click on DEFINE CUSTOM COLORS to create a custom color of your choice. Make a selection and click on OK. The Sample box will show how those selections appear.

   Tip
   To save the custom color for future use, click on ADD TO CUSTOM COLORS.

c. Click on OK on the CODE DISPLAY STYLE screen to return to the SCHEDULE CODE PROPERTIES screen.

Tips
For ease of viewing, limit the number of Schedule Code colors. For example, assign pale yellow to all available individual appointment codes, pink to all group appointment codes, and pastel blue to all non-appointment activity codes.

On some monitors, darker cell colors may obliterate the text that appears in the cell. This is due to the video driver or hardware, not the SARS·GRID software. If this occurs, select a lighter color for the cell.

8. For Font Settings:

   a. Follow the same instructions for COLOR (above) to select the color of the words/numbers for the Schedule Code.

   b. Click on **BOLD** and/or *ITALIC* to change the font. The Sample box will show how those selections appear.

   c. Click on OK on the CODE DISPLAY STYLE screen. This will return you to the SCHEDULE CODE PROPERTIES screen. The selected colors and fonts may be viewed in the Display Sample box.

Tip
For ease of viewing, use the **bold** font property for all appointment activity codes.

9. If this type of Schedule Code should <u>not</u> be overwritten in the event that a Master Schedule is re-added to THE GRID for the same date range, click on the PREVENT MASTER SCHEDULE OVERWRITE checkbox.

10. [Optional] Click on the CLEAR REASONS checkbox if you wish to prevent inadvertent inclusion of unwanted reasons when booking multiple students into a group appointment.

11. [Optional] You do not need to use the GROUP feature at this time. If you wish to use Groups, they must first be established. (See the information on Schedule Code Groups in Part I, Sections 5.3.)

12. Click on OK to return to the SCHEDULE CODES screen.

13. Repeat steps 1 – 12 to apply properties to other Schedule Codes.

14. To continue with the initial set-up for this Location, click on APPLY, and then click on the MISCELLANEOUS SETTINGS tab (see "MISCELLANEOUS SETTINGS" at Section 4.5 in this Part).

    -or-

15. At any time after the initial set-up, click on OK to return to LOCATION MAINTENANCE.

4.4.3 Change Information about a Schedule Code

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the SCHEDULE CODES tab.
7. Click on the desired Schedule Code. The existing code and description will be displayed.
8. Type a different code and/or a different description, if desired.
9. Click on PROPERTIES and make any applicable changes. (See "Schedule Code Properties" at Section 4.4.2 in this Part.)
10. Click on OK.

4.4.4 Delete a Schedule Code

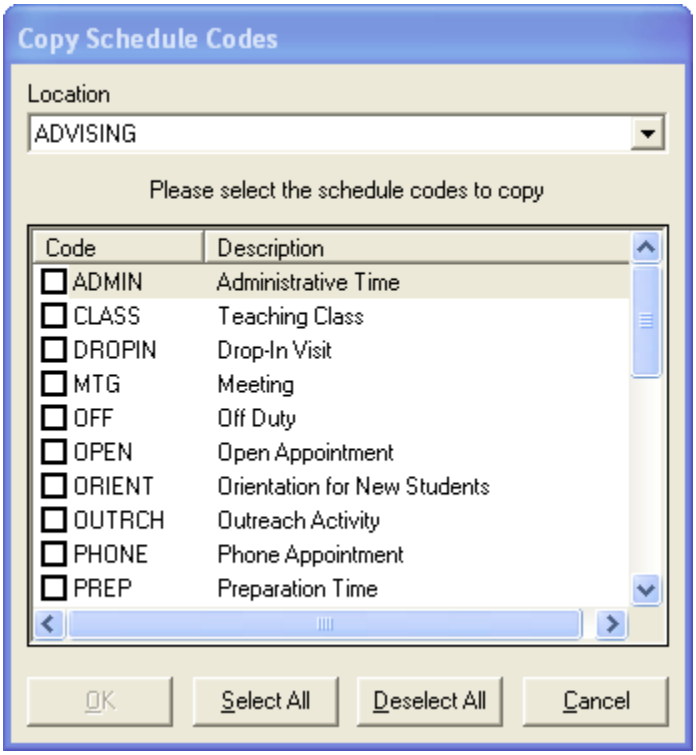
You may delete a Schedule Code only if it has never been used. The following Schedules Code types are required and should never be deleted: the default master schedule code, the booked appointment code, the booked appointment code for attended appointments, and the booked appointment code for no show appointments.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the SCHEDULE CODES tab.
7. Click on the desired Schedule Code. The existing code and description will be displayed.
8. Click on DELETE. A confirmation message will be displayed.
9. Click on YES to confirm the deletion.

4.4.5 Copy a Schedule Code from another Location

Any Schedule Code that has been created for one Location may be selected for use by other Locations via the COPY function. However, the copied Schedule Codes will reset to the shortest duration established for that Location. If a copied Schedule Code needs to be longer, remember to set its duration in Schedule Code Properties (see Section 4.4.2 in this Part). All other settings will be copied intact.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the Schedule Codes tab.
7. Click on COPY. A COPY SCHEDULE CODES sub-screen will be displayed. Here is an example:



The options are:

- LOCATION: Use to select the location from which existing Schedule Codes are to be copied.
- CODE/DESCRIPTION: Use to check the boxes for the Schedule Codes to be copied.

- OK: Use to approve the selections.
- SELECT ALL: Use to check all of the Schedule Codes for copying to your Location.
- DESELECT ALL: Use to deselect all the Schedule Codes.
- CANCEL: Use to exit the screen without saving the selections.

8. In LOCATION ▼, select the Location from which existing Schedule Codes are to be copied.
9. Click on the checkbox adjacent to each Schedule Code to be copied to the current Location. Any or all of the codes may be selected. The OK button will be enabled after the first Schedule Code is selected.

   -or-

   Click on SELECT ALL to check all boxes.
10. Click on OK. The selected Schedule Codes will appear on the SCHEDULE CODES screen for that Location.
11. Click on OK.

4.4.6 Archive a Schedule Code

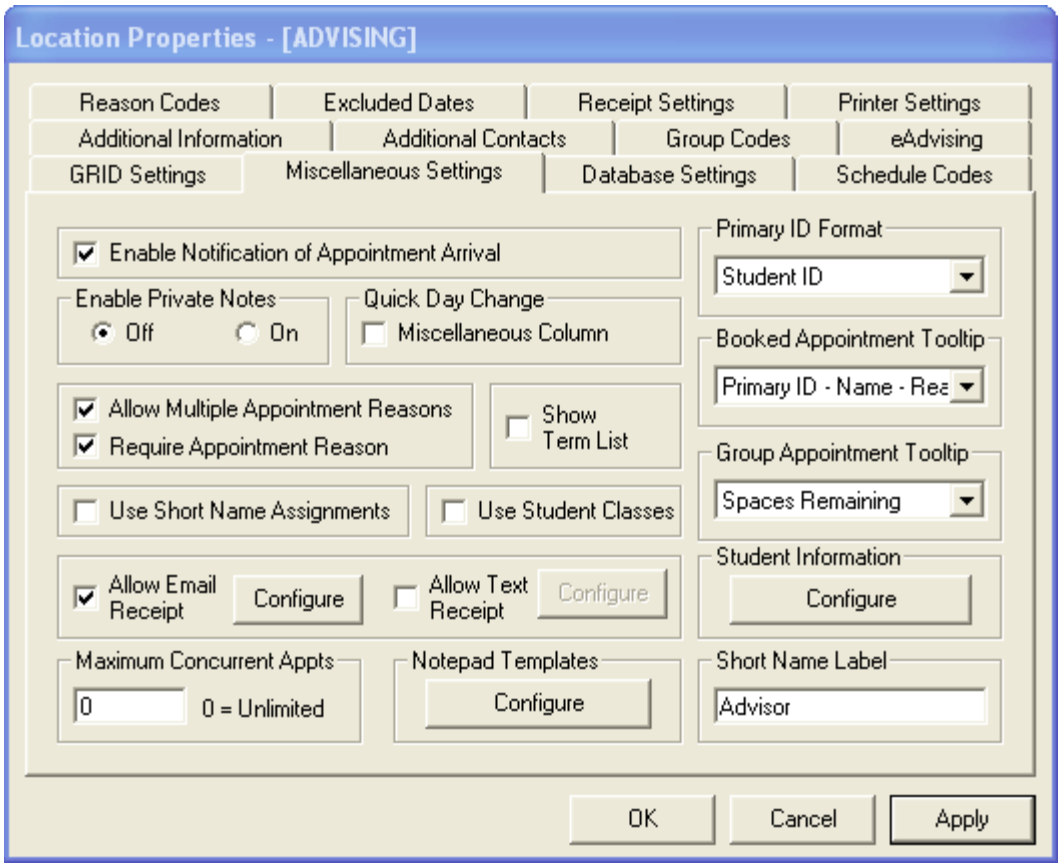
If a Schedule Code has ever been used, even if it is not currently in use, it cannot be deleted. However, these Schedule Codes may be archived. Archiving reduces clutter on the screen by hiding the Schedule Code on the following screens: Change Entire Column, Change Schedule Code, Quick Day Change, Master Schedule, and any reports that display a list of Schedule Codes. The Schedule Code will still remain on a Master Schedule template if it has already been added to the template.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the SCHEDULE CODES tab.
7. Click on the SCHEDULE CODE to be archived. The ARCHIVE checkbox will be activated.
8. Click on the ARCHIVE checkbox.
9. Click on SAVE. The SCHEDULE CODE will be archived until the checkbox is unchecked.
10. Repeat steps 7 – 9 to archive another Schedule Code.

4.5 Miscellaneous Settings

The Miscellaneous Settings screen is used to select or change the following options: Enable Notification of Appointment Arrival, Notepad Security, the Miscellaneous column on the Quick Day Change screen, Allow Multiple Appointment Reasons, Require Appointment Reason, Show Term List, Use Short Name Assignments, Use Student Classes, Allow Email Receipt, Allow Text Receipt, Maximum Concurrent Appts, Notepad Templates, Primary ID Format, tool tip formats for viewing booked appointments and group appointments, Student Information, and Short Name Label.

Here is an example of the screen layout.



The options are:

- ENABLE NOTIFICATION OF APPOINTMENT ARRIVAL: Use to send an instant message to notify the advisor that a student has arrived. This occurs automatically when the student's attendance is recorded.

- ENABLE PRIVATE NOTES: Use to establish whether the author of a note will be able to restrict viewing access by all other advisors. Selecting ON will add a PRIVATE option to the Note Visibility drop-down list on the NOTE DETAIL screen. Selecting OFF will disable that option.

• QUICK DAY CHANGE MISCELLANEOUS COLUMN:	Use to establish an optional column to be displayed on the QUICK DAY CHANGE SCREEN for the purpose of entering administrative record keeping information.
• ALLOW MULTIPLE APPOINTMENT REASONS:	Use to specify that more than one Reason Code may be selected for a single appointment activity.
• REQUIRE APPOINTMENT REASON:	Use to specify that a Reason Code must be selected when scheduling an appointment.
• SHOW TERM LIST:	Use to enable a TERM field on the Student Appointment screen so that the advisor will have the option to select a future term associated with an advising appointment.
• USE SHORT NAME ASSIGNMENTS:	Use to activate the feature that permits students to be assigned automatically to advisors by alphabetical assignment. Checking this box will also enable the Short Names Assignments Report on the Table Reports menu.
• USE STUDENT CLASSES:	Use to display a Course Selection Screen showing all of a student's current classes. The scheduler will be able to select courses from that list to represent the reasons for the appointment or drop-in visit.
• ALLOW EMAIL RECEIPT:	Use to select the option to send email receipts when appointments are committed.
CONFIGURE:	Use to display a configuration screen for the purpose of establishing various email settings to be used when sending email receipts.
• ALLOW TEXT RECEIPT:	[Available only if the college has a valid license for text messaging] Use to select the option to send text messages when appointments are committed, moved, copied, or cancelled.
CONFIGURE:	Use to display a configuration screen for the purpose of establishing various text settings to be used when sending text receipts.
• MAXIMUM CONCURRENT APPTS:	Use to specify the maximum number of appointments that a student may have pending in the system, or leave the setting at 0 to indicate that an unlimited number of appointments will be permitted.
• NOTEPAD TEMPLATES:	[optional] Use to set up notepad templates and to specify whether advisors will be allowed to create their own templates.
CONFIGURE:	Use to create templates for use on the Notepad. Also use to establish whether users may create their own templates.

- PRIMARY ID FORMAT: Use to select the primary format for student identifiers. (See "ID Format Maintenance" at Section 4.1 in this Part.)
- BOOKED APPOINTMENT TOOL TIP: Use to select the information that will be displayed as a tool tip when the cursor rests on a booked appointment.
- GROUP APPOINTMENT TOOL TIP: Use to select the information that will be displayed as a tool tip when the cursor rests on a group appointment.
- STUDENT INFORMATION: Use to select the option to specify certain data fields to be required or to be blocked on various screens.

  CONFIGURE: Use to select options to require that birth dates and/or comments be entered on the Student Appointment and Drop-in Appointment screens. Also, use to select options to block birth dates, addresses (including email addresses), and phone numbers from being displayed on the Student Appointment, Drop-in Appointment, and Search Results screens, as well as the Roster: **Warning: These selections will apply globally to ALL USERS in this Location.**
- SHORT NAME LABEL: Use to type in the type of Short Name to be displayed on the Grid and other locations (e.g., Display By Tutor, Display by Advisor, Advisor's Grid, etc.). This label will function dynamically, meaning that the label will change depending on the location that is selected.
- OK: Use to save entries or changes and close the LOCATION PROPERTIES screen.
- CANCEL: Use to cancel the actions without saving.
- APPLY: Use to save entries or changes without closing the LOCATION PROPERTIES screen.

4.5.1 Enable Notification of Appointment Arrival

If you want the system to send a message to advisors that a student has arrived, select this option. The notification will be sent automatically when the student's attendance is recorded. (For technical information about this feature, "SARS·Chat Configuration" in Part VII, Section 46.)

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.

6. Click on the MISCELLANEOUS SETTINGS tab.

7. Click on ENABLE NOTIFICATION OF APPOINTMENT ARRIVAL.

Warnings
The ENABLE NOTIFICATION OF APPOINTMENT ARRIVAL feature will not send notifications in the following situations:

- If the default for attendance has been set as YES. This is because the notification action is triggered when the student arrives for an appointment and attendance is recorded.
- If a manager (such as the department chair) has access to all advisors' grids, with a Short Name of ALL. This is because the system will not be able to identify the user for purposes of notification of an appointment arrival.
- If the user is not logged on to his/her PC.
- If a user is signed on to more than one PC with his/her own User Name and Password.

4.5.2 Enable Private Notes

If you want the author of a note to be able to restrict all other advisors from viewing a note, the ON option must be selected. Enabling this feature adds a PRIVATE option to the Note Visibility drop-down list on the NOTE DETAIL screen.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the MISCELLANEOUS SETTINGS tab.

7. In the ENABLE PRIVATE NOTES field:

   a. Click on ON to allow advisors the option to restrict all other advisors from viewing a note.

   -or-

   b. Click on OFF to prevent advisors from using the option to make a note private.

4.5.3 Quick Day Change Miscellaneous Column

If you want the Quick Day Change screen to display a Miscellaneous column so that administrative information can be recorded, select this option.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on the QUICK DAY CHANGE MISCELLANEOUS COLUMN checkbox.

4.5.4 Allow Multiple Appointment Reasons

If you would like students to be able to select more than one Reason Code when scheduling a single appointment or signing in for a drop-in activity, select this option.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on ALLOW MULTIPLE APPOINTMENT REASONS.

4.5.5 Require Appointment Reason

If students will be required to select a Reason Code when scheduling an appointment or signing in for a drop-in visit, select this option.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on REQUIRE APPOINTMENT REASON.

4.5.6 Show Term List

If you want advisors to be able to select a different term on the Student Appointment screen because the topic of the appointment pertains to a term in the future, select this option. This may be desired, for example, if an advising appointment pertains to a student's Ed Plan that is applicable to the next term. Selecting the Show Term List option will place a TERM field on the Student Appointment screen for selection by the advisor.

Note
The system administrator must also enter the terms on the SARS import program. . (See "Set up an Import Format" in Section 42.1, Part VII.)

4.5.7 Use Short Name Assignments

If you want the system to automatically assign students to advisors on an alphabetical basis, select this option.

Note
Even if this box is checked, users will have the option to override an assignment when making appointments.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on USE SHORT NAME ASSIGNMENTS if students are to be assigned alphabetically.

4.5.8 Use Student Classes

If you want to display a Course Selection Screen showing all of a student's current classes when a student is making an appointment or scheduling a drop-in visit, checking this option will enable the student or scheduler to select courses from that list to represent the reasons for the appointment or drop-in visit.

Note
If Classes are to be imported from another data source into the SARS database, the USE STUDENT CLASSES option **must** be checked.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the MISCELLANEOUS SETTINGS tab.

7. Click on USE STUDENT CLASSES.

4.5.9 Allow Email Receipt

If you want the system to send email receipts to students when appointments are committed in SARS·GRID, select this option and configure the email settings.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

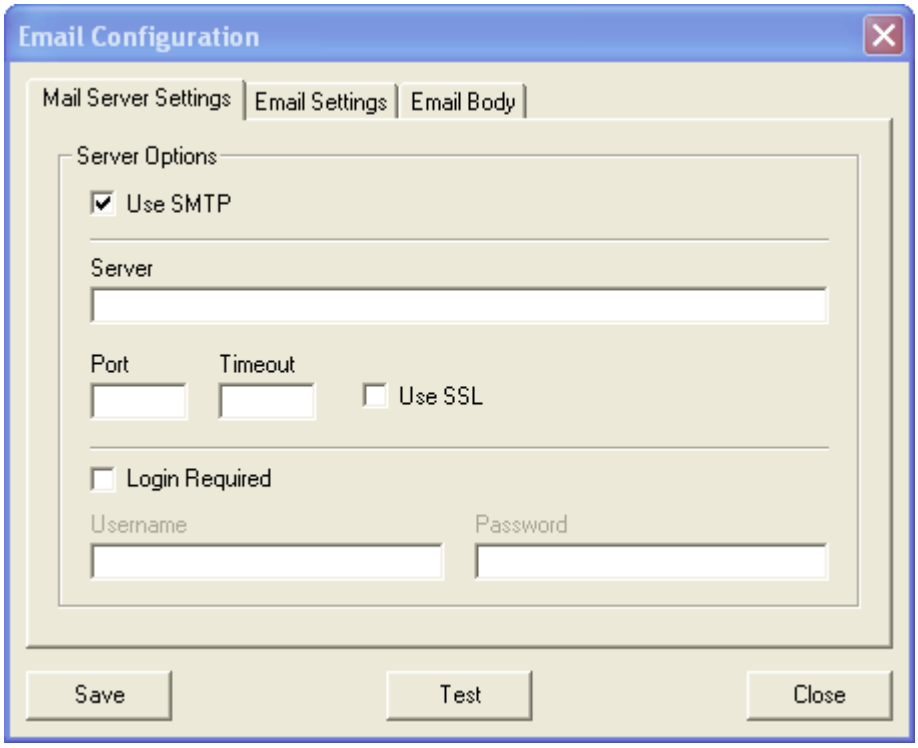
4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the MISCELLANEOUS SETTINGS tab.

7. Click on the ALLOW EMAIL RECEIPT checkbox.

8. Click on CONFIGURE to establish the specific email settings for this option. Here is an example:



The options are:

- SERVER OPTIONS:

USE SMTP:	Use to indicate that emails will be sent and received via the SMTP server on the college's network.
MAIL SERVICE URL:	[Displayed when Use SMTP is not checked] Use to enter the address of a server (to be provided by SARS Software Products, Inc.) in connection with the installation of a separate program that permits SARS users to send emails on networks that otherwise restrict them. Refer to Section 52.4 for installation instructions.
SERVER:	[Enabled only when Use SMTP is checked] Use to enter the DNS name or IP address of the SMTP server through which messages are to be sent.
PORT:	[Enabled only when Use SMTP is checked] Use to enter the port number on which the SMTP server listens for connections. This is typically port 25.
TIMEOUT:	[Enabled only when Use SMTP is checked] Use to specify the maximum time to wait for a response from the SMTP server.
USE SSL:	[Enabled only when Use SMTP is checked] Use to specify whether the SMTP server requires SSL (Secure Socket Layer) for authentication purposes.

- LOGIN REQUIRED: [Optional] Use if the authorized user of the email feature will be required to log in.

USERNAME:	Use to enter the username of the authorized user for the email feature.
PASSWORD:	Use to enter the password of the authorized user for the email feature.

a. If the college allows users to send emails from their computers without restriction, click on the USE SMTP checkbox. The title of the MAIL SERVICE URL field will change to read SERVER.

   i) Click on the SERVER field and type in the address of the SMTP server.

   ii) Click on the PORT field and type in the number of the SMTP port.

   iii) Click on the TIMEOUT field and type in the number of seconds that the system should wait for a response from the SMTP server before disconnecting (e.g., 60 seconds).

   iv) Click on USE SSL if the SMTP server requires SSL for authentication purposes.

b. If the college does not allow users at individual workstations to send emails from their computers, the college may request that SARS Software Products, Inc. provide a separate program that works to bypass the college's restrictions and allow SARS users to send emails within the SARS programs. Technical staff should install the program

following the instructions in Part VII, Section 52.1. After the program has been installed, follow the steps below.

i) Leave the SMTP checkbox blank.

ii) Click on the MAIL SERVICE URL field and copy the URL address of the server that was created when installing the program. If this was already done by IT staff, the URL should already be displayed in this field.

Note:
The configuration in steps a. or b., above, may be installed on any computer that is using SARS·GRID for the selected Location. When configured, all other computers that use the selected Location will be affected.

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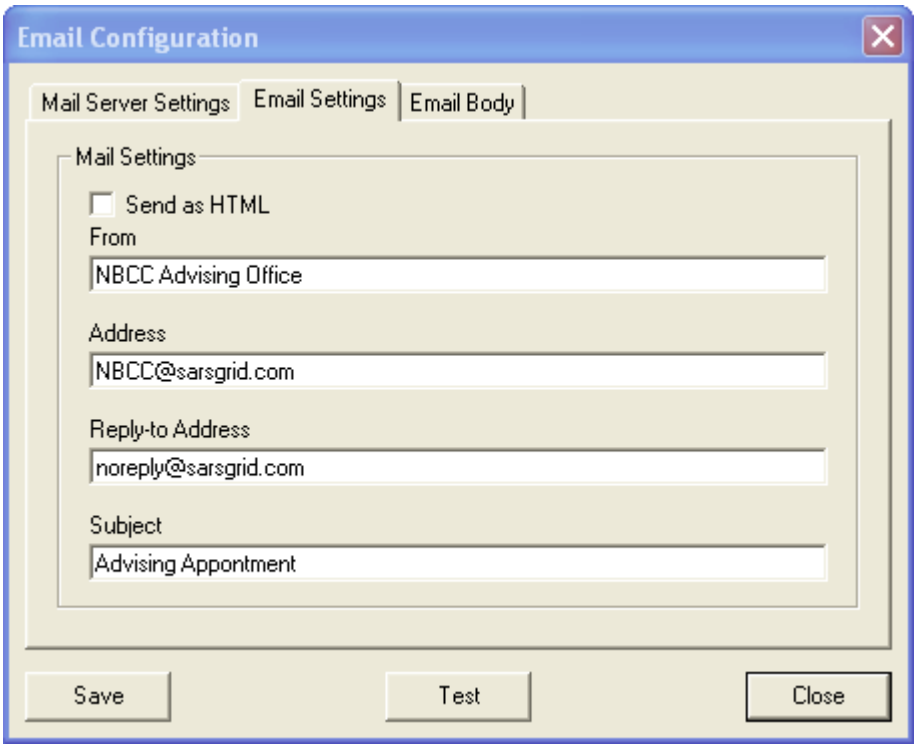
c. If users will be required to login to use the email feature, click on the LOGIN REQUIRED checkbox. Then,

i) Click on the USERNAME field and type in the specific Username of the authorized user for the email feature.

ii) Click on the PASSWORD field and type in the specific Password of the authorized user for the email feature.

d. Click on SAVE.

e Click on the EMAIL SETTINGS tab to display the next screen. Here is an example:



The options are:

MAIL SETTINGS

- SEND AS HTML: Use to specify whether emails should be sent using HTML. If left unchecked, the emails will be sent as Plain Text.
- FROM: Use to enter the name of the entity that will be sending the email messages (e.g., Advising Department).
- ADDRESS: Use to enter the email address of the sender (e.g., Advising@NorthBay.edu).
- REPLY-TO-ADDRESS: Use to enter the email address to which replies will be sent (e.g., Advising@NorthBay.edu).
- SUBJECT: Use to enter a subject line for these emails (e,g., Appointment Receipt).

f. Click on the SEND AS HTML checkbox to specify that emails should be sent in HTML format rather than plain text. Otherwise leave the checkbox blank.

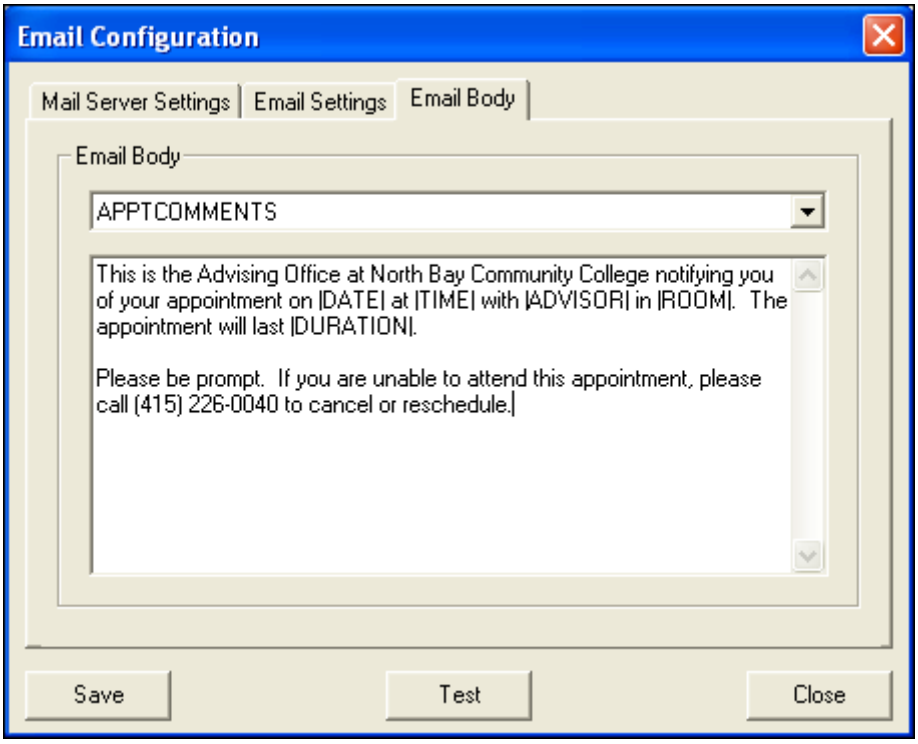
g. Click on the FROM field and type in the name of the sender.

h Click on the ADDRESS field and type in the email address of the sender.

i. Click on the REPLY-TO-ADDRESS field and type in the email address to which replies will be sent.

j. Click on the SUBJECT field and type in a subject title that will be displayed as the subject line in these email messages.

k. Click on the EMAIL BODY tab to display the next screen. Here is an example:



The options are:

- APPTCOMMENTS: Use during the composition of the email message to have the system automatically insert any appointment comments in the body of the message.
- ADVISOR: Use to have the system automatically insert the name of the individual with whom the student has the appointment in the body of the message.
- DATE: Use to have the system automatically insert the date of the appointment in the body of the message.
- DURATION: Use to insert the duration of the appointment in the body of the message.
- REASONS: Use to insert the reasons for the appointment in the body of the message.
- ROOM: Use to have the system automatically insert the advisor's room number in the body of the message.
- SCHEDULE CODE DESC: Use to have the system automatically insert a description of the Schedule Code in the body of the message. This may be useful in cases where an advisor works at more than one campus. A Schedule Code Description (e.g., North Campus, Hunt Hall, Room 240) would print the advisor's room number for appointments scheduled for the corresponding appointment allowable Schedule Code, whereas another Schedule Code Description (e.g., South Campus, Bailey Hall, Room 118) would print the advisor's room number for appointments scheduled for the corresponding Schedule Code. (Note: For such situations, Room Number on Short Name Maintenance should be left blank for advisors who have appointments in different rooms.)
- STUDENTID: Use to have the system automatically insert the student's ID number in the body of the message.
- TIME: Use to have the system automatically insert the time of the appointment in the body of the message.
- TITLE: Use to have the system automatically insert the advisor's title in the body of the message.
- SAVE: Use to save the current message.
- TEST: Use to verify that the email settings are working properly. (If the SARS·GRID Email Web Service will be used in lieu of SMTP, this test is done as part of the installation process - See Part VII, Section 52.2.)
- CLOSE: Use to exit the screen.

l. Click on the empty field and begin typing the desired message.

m. To have the system automatically insert any comments associated with the appointment, position the cursor at that point and then click on ▼ and select APPTCOMMENTS. A placeholder will be inserted; it looks like this: |APPTCOMMENTS|.

n. To have the system automatically insert the advisor's name, position the cursor at that point and then click on▼ and select ADVISOR. A placeholder will be inserted; it looks like this: |ADVISOR|.

o. To have the system automatically insert the date of the appointment, position the cursor at that point and then click on ▼ and select DATE. A placeholder will be inserted; it looks like this: |DATE|.

p. To have the system automatically insert the duration of the appointment, position the cursor at that point and then click on ▼ and select DURATION. A placeholder will be inserted; it looks like this: |DURATION|.

q. To have the system automatically insert the reason(s) selected for the appointment, position the cursor at that point and then click on ▼ and select REASONS. A placeholder will be inserted; it looks like this: |REASONS|.

r. To have the system automatically insert the room number of the appointment, position the cursor at that point and then click on ▼ and select ROOM. A placeholder will be inserted; it looks like this: |ROOM|.

s. To have the system automatically insert a description of the schedule code for the appointment, position the cursor at that point and then click on ▼ and select SCHEDULE CODE DESC. A placeholder will be inserted; it looks like this: |SCHEDULE CODE DESC|.

t. To have the system automatically insert the student's ID number, position the cursor at that point and then click on ▼ and select STUDENTID. A placeholder will be inserted; it looks like this: |STUDENTID|.

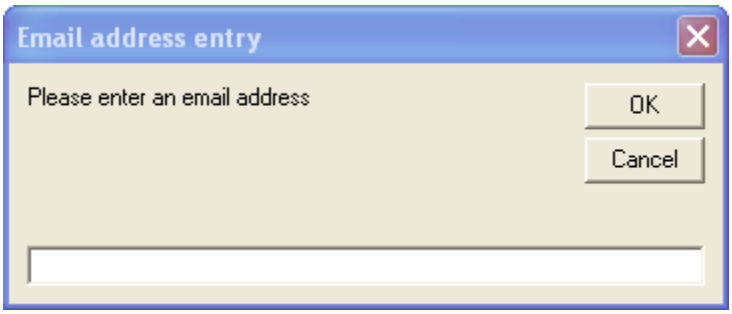
u. To have the system automatically insert the time of the appointment, position the cursor at that point and then click on ▼ and select TIME. A placeholder will be inserted; it looks like this: |TIME|.

v. To have the system automatically insert the advisor's title, position the cursor at that point and then click on ▼ and select TITLE. A placeholder will be inserted; it looks like this: |TITLE|.

w. Click on SAVE. Here is an example of a completed appointment reminder message:

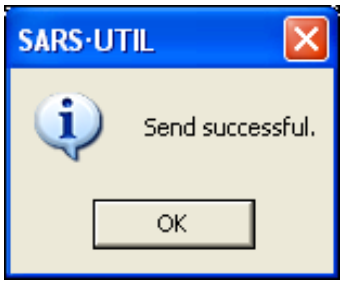
> This is the Advising Office at North Bay Community College notifying you of your appointment on |DATE| at |TIME] with |ADVISOR| in |ROOM]. The appointment will last [DURATION].
>
> Please be prompt. If you are unable to attend this appointment, please call (415) 226-0040 to cancel or reschedule.

x. To test the message settings, click on TEST to display the following screen:



i) Type in the email address of the individual who will be receiving the test message.

ii) Click on OK. If the message is sent successfully, the following message will be displayed.



iii) Click on OK.

iv) Open your email inbox and retrieve the test message. If the results are satisfactory, return to the EMAIL CONFIGURATION screen and click on CLOSE to return to the MISCELLANEOUS SETTINGS screen.

Note
The test email message is hard-coded to display the following values for the embedded options. They are:

Date:	The date on which the test is sent.
Time:	The time at which the test is sent.
Advisor:	Email Test
Room:	100-B
Duration:	30 minutes.
Reasons:	Advising, ED plan

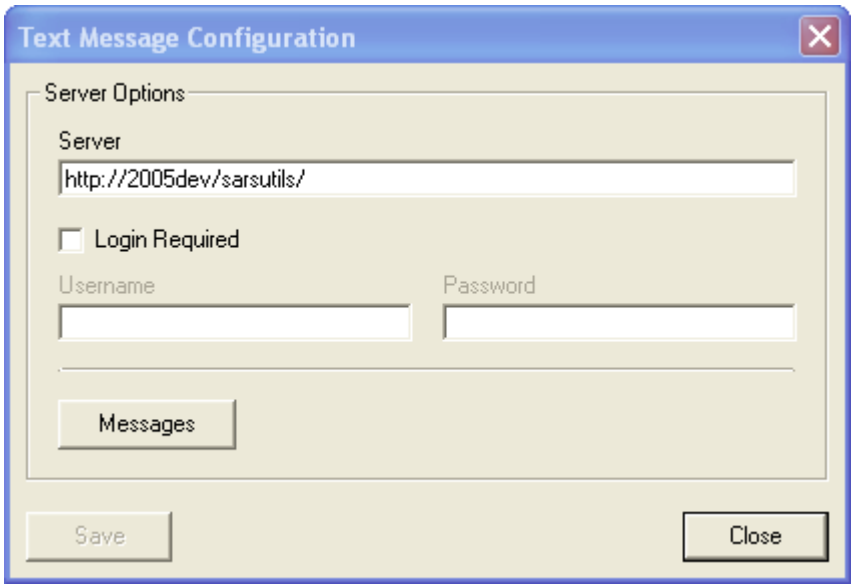
4.5.10 Configure Text Messages

If the college has a valid license from SARS Software Products, Inc. to use text messages, an option will be available to send automated text messages to students to confirm the following appointment-related events:

- When an appointment is committed.
- When an appointment is moved.
- When an appointment is copied.
- When an appointment is cancelled, if Text Receipt is checked on the Student Appointment Screen.

If you want the system to send text receipts to students when appointments are committed in SARS·GRID, select this option and configure the text settings.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on the ALLOW TEXT RECEIPT checkbox.
8. Click on CONFIGURE to establish the server options for text messages. Here is an example:



The options are:

- SERVER: Use to type in the IP address of the server through which text messages are to be sent.

- LOGIN REQUIRED: [Optional] Use if the authorized user of the email feature will be required to log in.

  USERNAME: [Enabled if Login Required is checked] Use to enter the username of the authorized user for the email feature.

  PASSWORD: [Enabled if Login Required is checked] Use to enter the password of the authorized user for the email feature.

- MESSAGES: Use to display a TEXT MESSAGES screen for configuring text messages.

- SAVE: Use to save the current configurations.

- CLOSE: Use to exit the screen.

a. Click on the SERVER field and type in the IP address of the server through which text messages will be sent.

b. If users will be required to login to use the text feature, click on the LOGIN REQUIRED checkbox. Then,

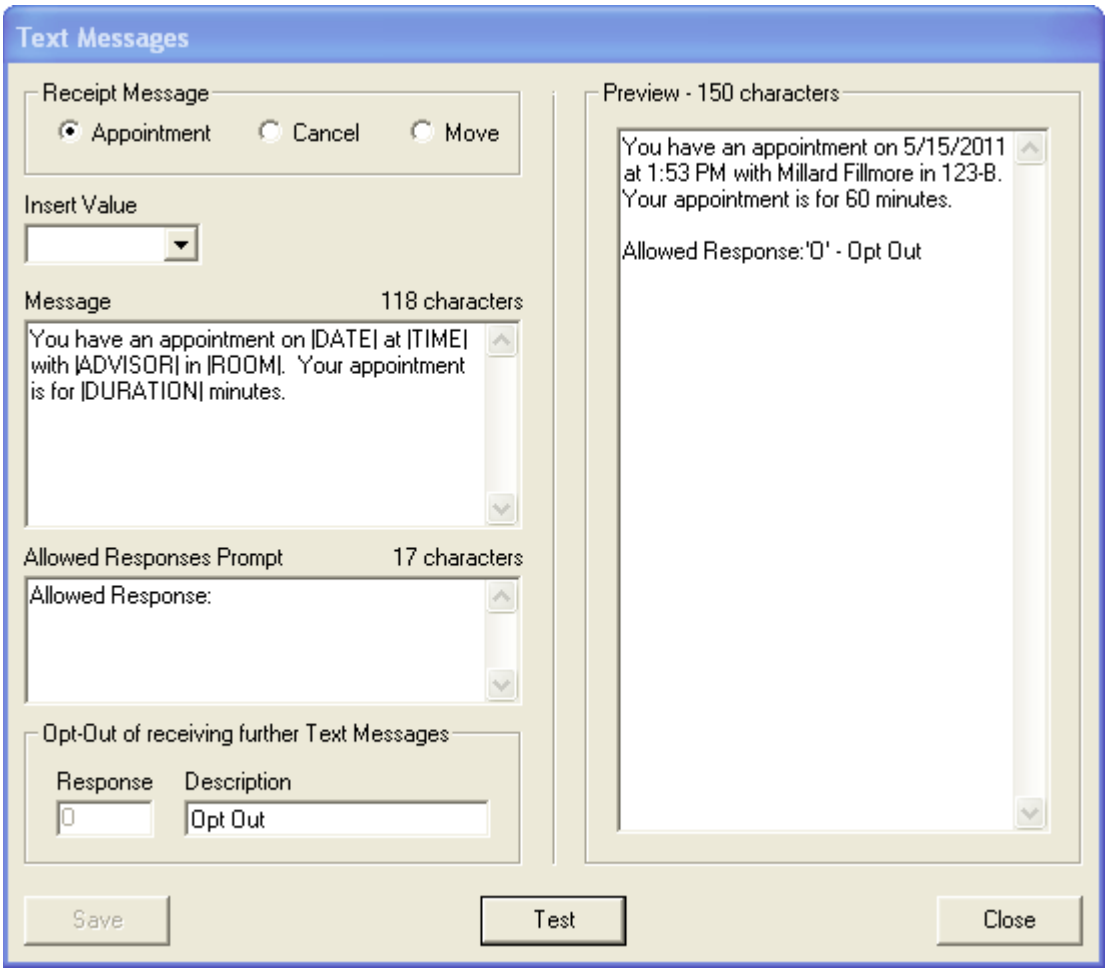
   i) Click on the USERNAME field and type in the specific Username of the authorized user for the text feature.

   ii) Click on PASSWORD field and type in the specific Password of the authorized user for the text feature.

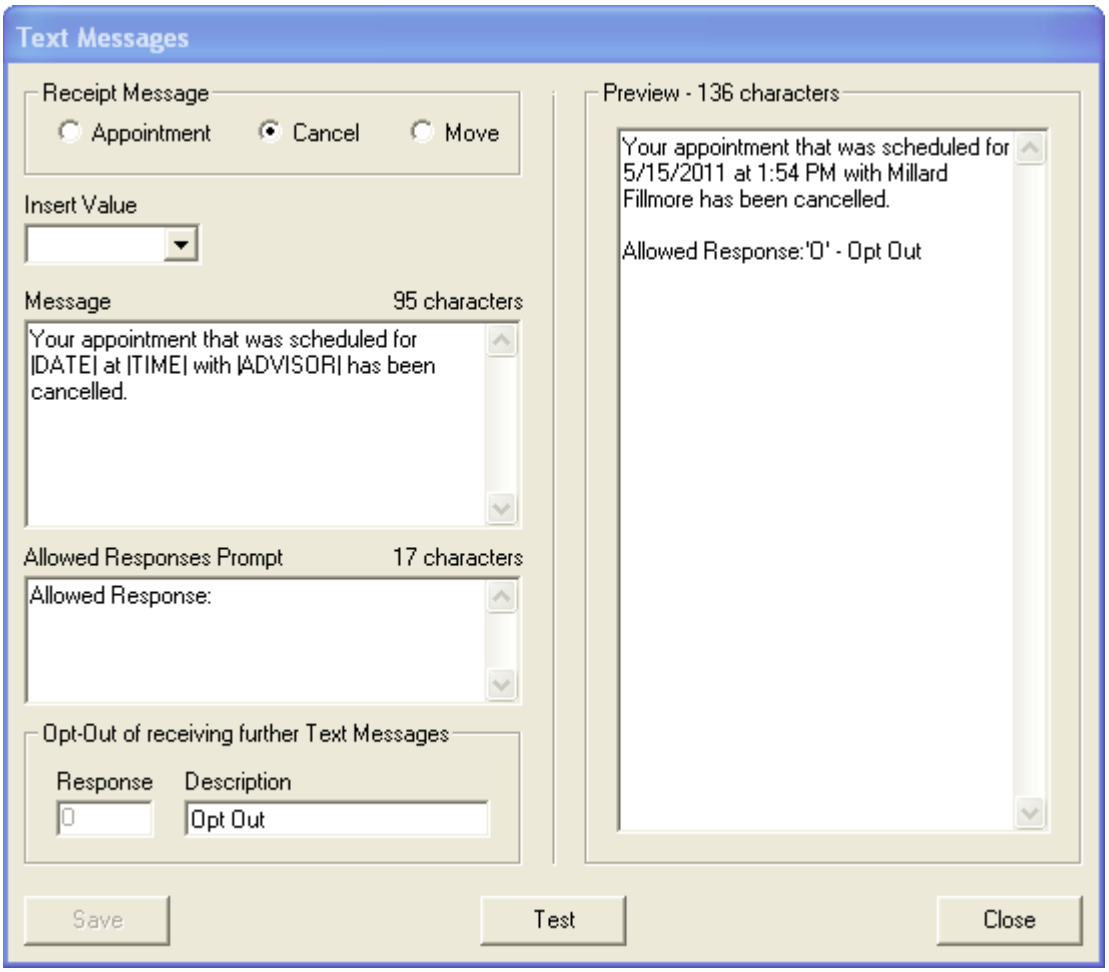
c. Click on SAVE.

9. Click on MESSAGES to display a TEXT MESSAGES configuration screen.

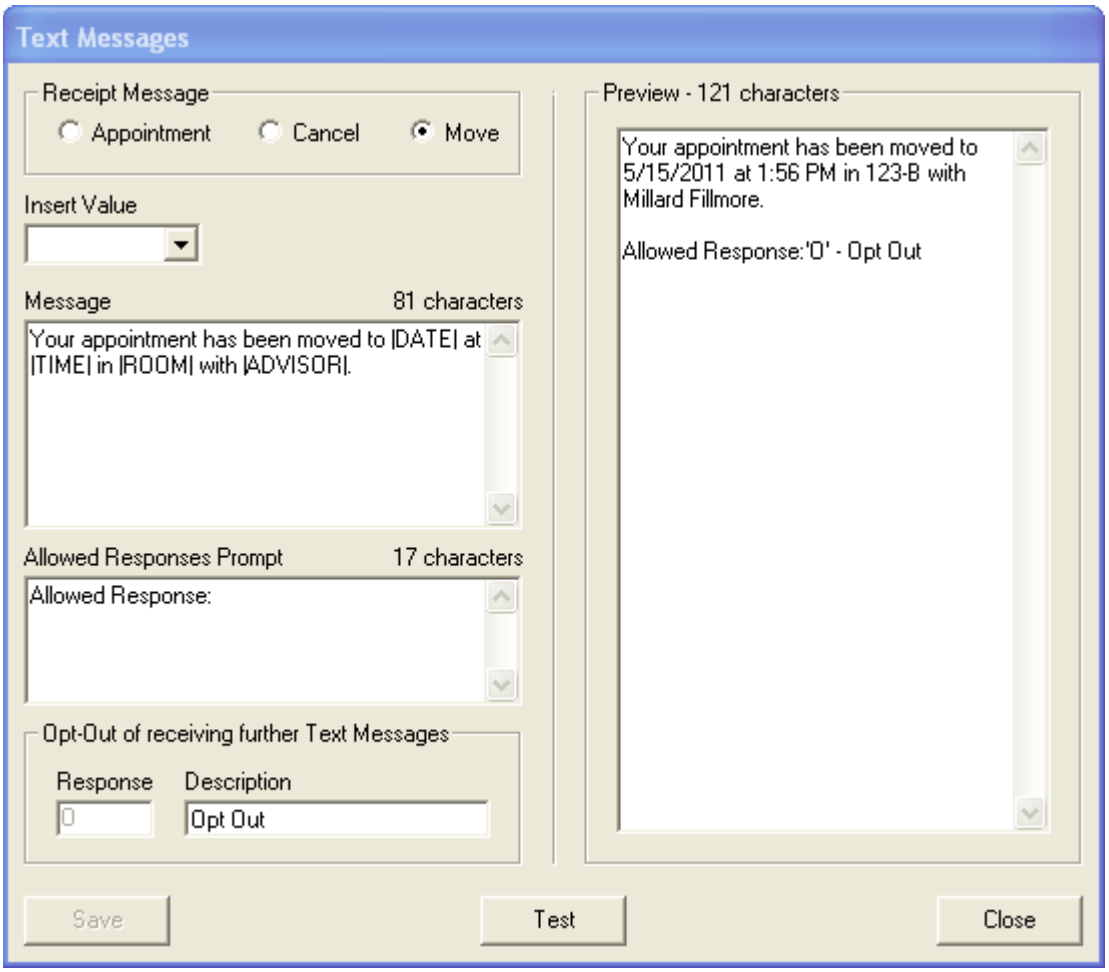
Here is an example of a Receipt Message that may be sent when an appointment is committed or copied:



Here is an example of a Receipt Message that may be sent when an appointment is cancelled:



Here is an example of a Receipt Message that may be sent when an appointment is moved:



The options are:

- RECEIPT MESSAGE: Use to select the type of message to be created.

  APPOINTMENT: Use to specify that the text message will confirm appointments.

  CANCEL: Use to specify that the text message will notify students of a cancelled appointment.

  MOVE: Use to specify that the text message will notify students of an appointment that has been moved.

- INSERT VALUE: Use to select the values that will be inserted in the text of the message. The options are: |DATE|, |TIME|, |ADVISOR|, |ROOM| and |DURATION|.

- MESSAGE: Use to type in the desired message, inserting relevant values as needed. Although the field will accept up to 2,000 characters, the maximum size for a single message is 160 characters. Anything longer will be split into two or more messages.

- ALLOWED RESPONSES PROMPT: Use to type in text, such as "Allowed Response", which will be used in conjunction with the Opt-Out options. The student will see these words at the end of the message. The field will accept up to 255 characters; however, it is recommended that this entry be no more than 15 – 20 characters in length.

- OPT-OUT OF RECEIVING FURTHER TEXT MESSAGES:

  RESPONSE: Use to specify a letter or numeral that the student must use if they wish to opt out of receiving further text messages for the designated purpose. In the example above, the letter O is used. This character will be displayed to the student, along with its description, as a prompt at the end of the text message. It is recommended that this entry be one character.

  DESCRIPTION: Use to enter a brief description of the Opt Out response. Try to keep the description as short as possible.

- PREVIEW: Use to view how the message will appear. If the message is too long, it will flow into additional text messages, and you may wish to shorten it.

- SAVE: Use to store the settings created for the specified text message.

- TEST: Use to make a test of the message by sending it to your own cell phone.

- CLOSE: Use to exit the screen.

10. In the RECEIPT MESSAGE panel, click on APPOINTMENT to create a text message for appointment receipts.

11. Click on the MESSAGE text box and begin typing the desired message.

    a. When you reach the point in the message where you want to have the system automatically insert the date of the appointment, click on INSERT VALUE ▼ and select |DATE|. This is a place holder into which the system will automatically insert the appointment date.

    b. To have the system automatically insert the time of the appointment, click on INSERT VALUE ▼ and select |TIME|. This is a place holder into which the system will automatically insert the appointment time.

    c. To have the system automatically insert the advisor's name, click on INSERT VALUE ▼ and select |ADVISOR|. This is a place holder into which the system will automatically insert the name of the advisor.

d. To have the system automatically insert the room number, click on INSERT VALUE ▼ and select |ROOM|. This is a place holder into which the system will automatically insert the room number for the appointment.

12. In the OPT OUT OF RECEIVING FURTHER TEXT MESSAGES panel,

    a. Click on the Response field and type in a character that a student will use to select that option. For example, “O” for “opt out.”

    b. Then click on the Description field and type in a description of the option. For example: “Opt out”.

13. View the appearance of the message in the PREVIEW panel on the right-hand side of the screen. Note that the values for Date, Time, Advisor, and Room Number will not represent the actual words that will be in the real text messages. The examples for Date and Time will be the longest possible date and time in terms of character length. The Advisor example will be the longest advisor name that exists on the User Name Maintenance screen. The Room number will be the longest Room number that exists in the database. If the message flows over to a second text message, edit to make it shorter.

14. Click on SAVE to store the settings.

15. To test whether the message is properly configured, click on TEST.

    a. Type in the cell phone number that is capable of receiving text messages that you will be able to view.

    b. Click on OK.

    c. Wait until the text message comes through on the cell phone. If the message is displayed, the system has been configured properly.

16. Repeat steps 10 – 15 to configure text messages for cancelled appointments and then again for appointments that have been moved.

17. When done, click on CLOSE.

4.5.11 Maximum Concurrent Appointments

If students will be allowed to have an unlimited number of appointments pending in SARS·GRID, leave the setting in this option at 0. Otherwise, select a number that indicates the maximum number of appointments they may have pending by following the steps below.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the MISCELLANEOUS SETTINGS tab.

7. Click on the MAXIMUM CONCURRENT APPTS field.

8. Type in the maximum number of appointments that a student may have pending in the system.

4.5.12 Notepad Templates

This optional feature is available for (1) creating notepad templates that may be used by all advisors in this Location and for (2) specifying whether advisors will be allowed to create their own templates. Notepad templates are useful when identical or similar notes are created frequently.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

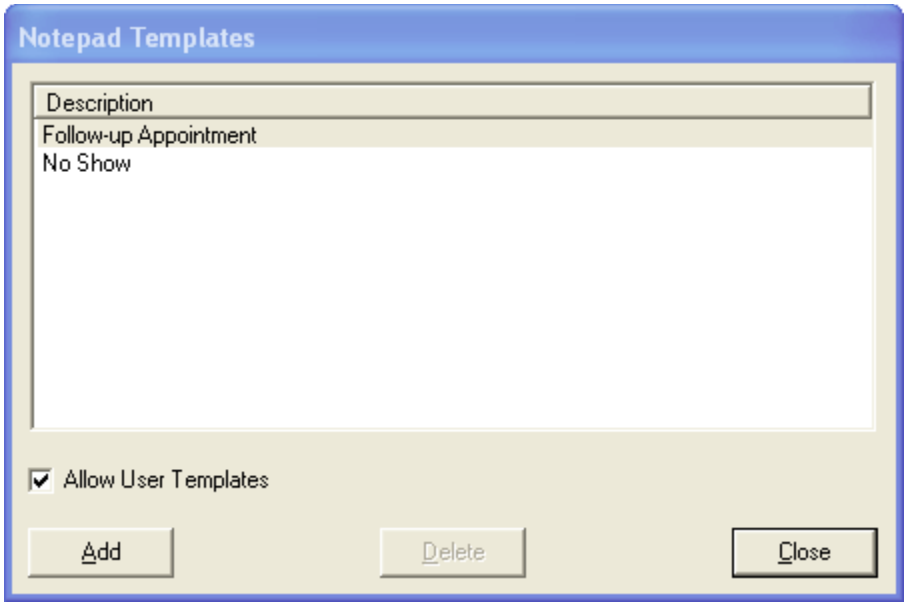
3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the MISCELLANEOUS SETTINGS tab.

7. Click on CONFIGURE in the NOTEPAD TEMPLATES panel if you wish to create pre-defined templates for use by Notepad users and to specify whether those users can create their own templates. A Notepad Templates screen will be displayed. Here is an example:

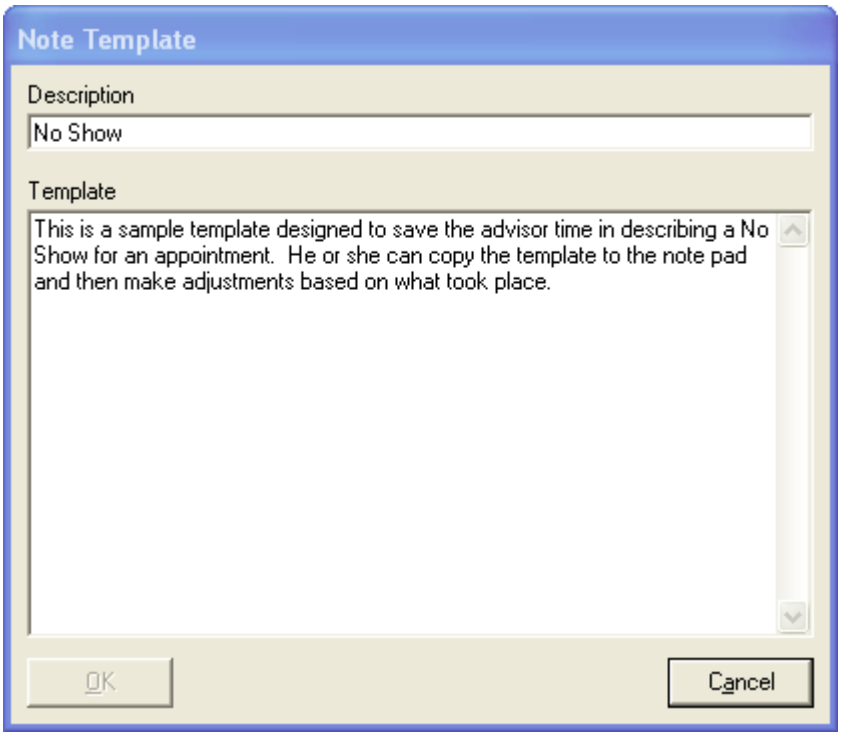


The options are:

- ALLOW USER TEMPLATES: Use to specify that users who have access to the Notepad may create their own templates.

- ADD: Use to display a Notepad Template screen to create a pre-defined template.
- DELETE: Use to delete a template.
- CLOSE: Use to save the entries made and to exit the screen.

a. Click on ADD to display a NOTE TEMPLATE screen. Here is an example:



b. Click on the DESCRIPTION field and type in a description of the template. This description label will be displayed on a pre-defined templates sub-menu if a user clicks on Templates when adding or appending a note for a selected student.

c. Click on the TEMPLATE field and type in the text of the template.

d. Click on OK to return to the previous screen.

e. Repeat steps a – d to create other templates.

Note
To view or edit a template that has been created, double click on the Notepad Templates screen. This will display the Note Template that has been created.

f. If desired, click on the ALLOW USER TEMPLATES to permit users to create their own templates. This action will place a Templates button on the Notepad

g. Click on CLOSE to save the settings and exit the screen.

4.5.13 Primary ID Format

The primary ID Format to be used in this Location must be selected from a list of existing ID Formats.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on PRIMARY ID FORMAT ▼; then select the primary student ID format. If the desired format is not shown as an option, see "Add an ID Format" in Section 4.1.1 in this Part.

4.5.14 Booked Appointment Tool Tip

Tool Tips can display information about a booked appointment when the user rests the cursor over that appointment slot. To select the information that will be displayed as a tool tip, follow these steps.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on BOOKED APPOINTMENT TOOLTIP ▼.
8. Select one of the following options for the tool tip display.

   Initials: To display only the student's initials.
   Name: To display only the student's name.
   Nothing: To disable the tool tip feature entirely.
   Primary ID: To display only the student's primary identifier.
   Primary ID - Name: To display both the student's primary identifier and name.
   Primary ID - Name - Reason Code(s): To display all three items of information.
   Primary ID - Reason Codes(s): To display the student's identifier and Reason Code(s)
   Reason Code(s): To display the reason code(s) for the appointment.

4.5.15 Group Appointment Tool Tip

Tool Tips can display information about a booked appointment when the user rests the cursor over that appointment slot. To select the information that will be displayed as a tool tip, follow these steps.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on GROUP APPOINTMENT TOOLTIP ▼.
8. Select one of the following options for the tool tip display:

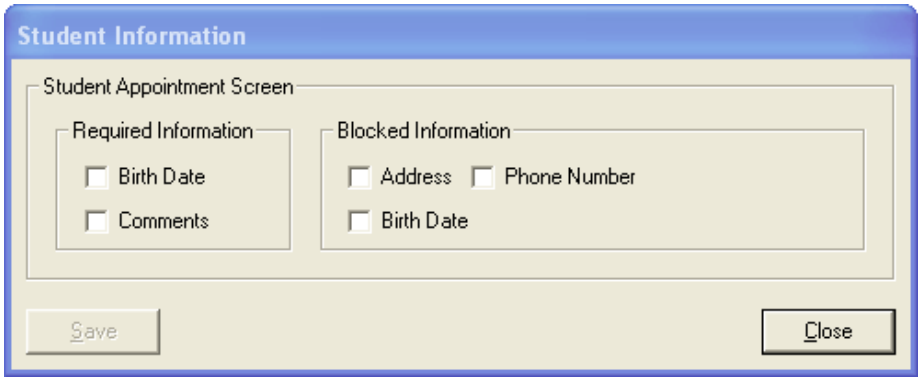
   Spaces Remaining
   Spaces Remaining – Reason Code(s)

4.5.16 Student Information

This feature enables the system administrator to establish certain identifying information about students that will be blocked or displayed on the following screens: Student Appointment screen, Drop-in Appointment screen, the Roster, and Search Results screen.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the MISCELLANEOUS SETTINGS tab.
7. Click on CONFIGURE in the STUDENT INFORMATION panel.

The following screen will be displayed:



The options are:

- REQUIRED INFORMATION: Use to select data fields on the Student Appointment and Drop-in Appointment screens for which data must be entered. **[Warning: These selections will apply globally to all users in this Location.]**

  BIRTH DATE: If checked, users will be required to enter birth dates in the BIRTH DATE field.

  COMMENTS: If checked, users will be required to enter comments in the COMMENTS field.

- BLOCKED INFORMATION: **[Warning: Use this feature with care. Blocking applies globally to all users in this Location.]** Use to specify data that will not be displayed and cannot be used on the Student Appointment, Drop-in Appointment, and Search Results screens, as well as the Roster:

  Note
  When the purpose of blocking data fields is to prevent student employees from viewing personal information about other students, be aware that the information will still be displayed on reports. Therefore, **the Access Code assigned to student employees should not include permission for Reporting** (see "Access Code Maintenance" at Section 4.8 in this Part).

  ADDRESS: If checked, the ADDRESS panel will not be displayed. This includes all Address information, including Email address.

  BIRTH DATE: If checked, users cannot view or enter data in the BIRTH DATE field. Note that this field may not be both blocked and required. Select one or the other.

  PHONE NUMBER: If checked, users cannot view or enter data in the PHONE NUMBER fields.

8. Click on the desired options.

9. Click on SAVE.

10. Click on CLOSE to return to the MISCELLANEOUS SETTINGS screen.

4.5.17 Short Name Label

This option enables the system administrator to select the Short Name Label (e.g., Advisor, Counselor, Tutor, etc.) that should be display on THE GRID, MY GRID, and other screens where a Short Name label exists. This is a method for customizing screens for different Locations so that the labels are more closely associated with the users in that Location.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the MISCELLANEOUS SETTINGS tab.

7. Click on the SHORT NAME LABEL field.

8. Type in the descriptor that should be displayed on various screens (e.g., Advisor, Counselor, Tutor, etc.). The field accepts up to 15 characters.

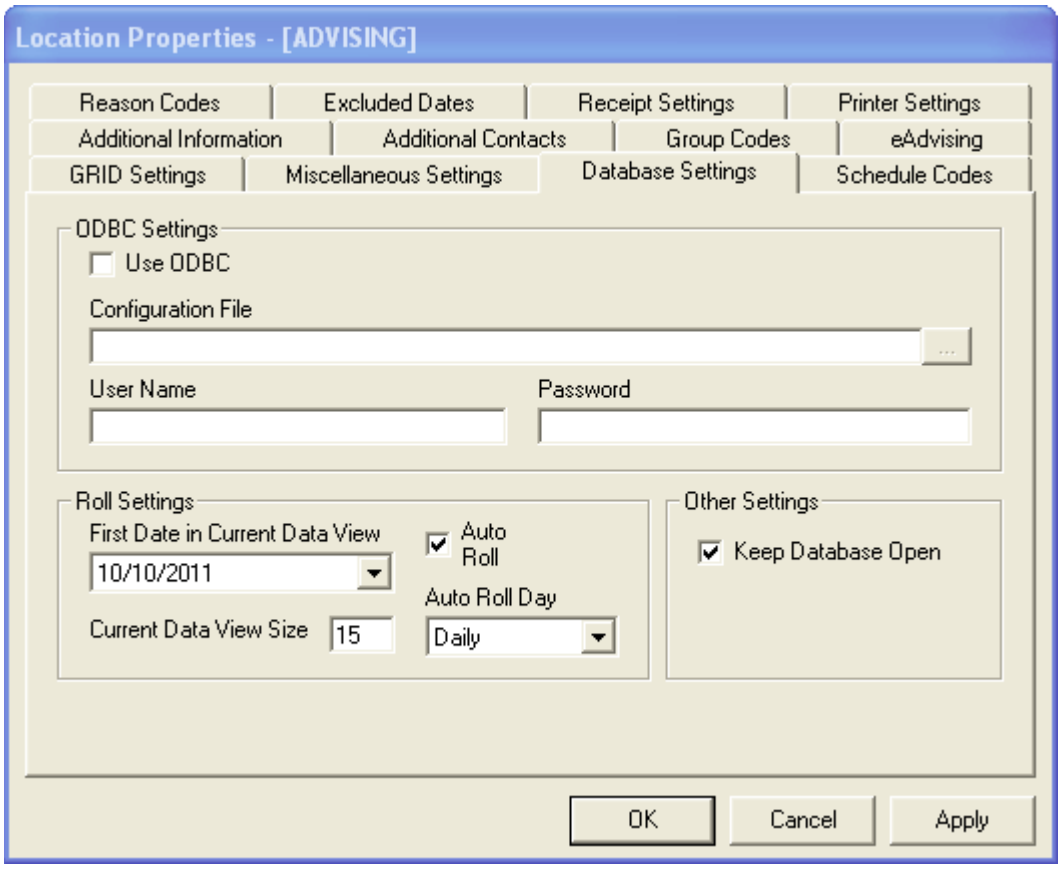
9. To continue with the initial set-up for this Location, click on APPLY, and then click on the DATABASE SETTINGS tab (see “DATABASE SETTINGS” at Section 4.6 in this Part), or

10. Click on OK to return to LOCATION MAINTENANCE.

4.6 Database Settings

The Database Settings screen is used to establish the ODBC settings for the database, the Roll settings, and Other settings.

Here is an example of the screen layout.



The options are:

- ODBC SETTINGS: Use to allow real time access to your college's student database while making appointments.

  USE ODBC: Use to activate access.

  CONFIGURATION FILE: Use to enter the name of the file that contains the information about the database file.

  USER NAME: Use to enter the user identification to gain access to the college's host student database.

  PASSWORD: Use to enter the password of the user to gain access to the college's host student database.

- ROLL SETTINGS: Use to move THE GRID forward in time. The system takes into consideration the Current Data View Size. [Enabled only if the user has been assigned Table Maintenance access rights.]

FIRST DATE IN CURRENT DATA VIEW:	Use to re-set the first date in THE GRID's Current Data View manually. The date will be picked up from the server that is running SARS·GRID rather than the date that may be displayed on the user's computer.
CURRENT DATA VIEW SIZE:	Use for colleges that choose to roll THE GRID manually and need to set a Current Data View that has a variable size based on any day of the week.
AUTO ROLL:	Use to select the option to move THE GRID forward in time automatically.
AUTO ROLL DAY:	Use to select the day of the week on which THE GRID will be moved forward in time automatically, or to select DAILY to roll THE GRID forward every day.

- OTHER SETTINGS:

KEEP DATABASE OPEN:	Use to keep the SARS database open at all times. This will greatly increase the performance of SARS·GRID. If using Access 2000, always leave open. If using a client server database, make sure you have a sufficient number of licenses to cover all users before selecting this option.

- OK: Use to save entries or changes and close the LOCATION PROPERTIES screen.
- CANCEL: Use to cancel the actions without saving.
- APPLY: Use to save entries or changes without closing the LOCATION PROPERTIES screen.

4.6.1 Establish and Use the Roll Settings

Rolling THE GRID refers to the act of changing the dates that will appear in the Current Data View, as well as the History and Future Data Views. The system takes into consideration the Current Data View size and will not allow "Today" to be pushed into History Data View. Rolling THE GRID is an ongoing requirement. Rolling THE GRID does not require that users be logged off the system.

Two options are available for rolling THE GRID:

- Setting it up to roll automatically on a pre-set day, or
- Rolling THE GRID manually.

If the automatic method is used, THE GRID will roll on the selected day(s) without any further action by the user after the initial setup. The Roll action will be triggered when the first person with access rights to Roll THE GRID logs on to the system on the morning of the Roll date. THE GRID for all Locations to which that individual user has access will be rolled forward at that time.

If the manual method is used, a user will need to change the date using the DATABASE SETTINGS screen. As soon as the user clicks on OK, THE GRID will be rolled. The screen will be refreshed when the user next opens THE GRID screen.

It is recommended that THE GRID be rolled daily. Each Location using SARS·GRID may choose its own options for rolling THE GRID.

▶Set-Up Auto Roll

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on DATABASE SETTINGS.
7. In ROLL SETTINGS, click on the AUTO ROLL checkbox. The AUTO ROLL DAY field will be displayed.
8. Select the day on which THE GRID should be rolled. The options are:

   Daily
   Sunday
   Monday
   Tuesday
   Wednesday
   Thursday
   Friday
   Saturday

   Warning
   If a day is selected on which no user will be logging on to SARS·GRID (e.g,. Sunday), the roll action will be skipped. Therefore, select a day with this in mind.

9. To continue with the initial set-up for this Location, proceed to “Establish Other Settings” in Section 4.6.2 below.

   -or-

   When done, click on OK. THE GRID will thereafter be rolled forward on the selected day when a user who has ROLL access rights next signs onto the system.

▶Roll THE GRID manually

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on DATABASE SETTINGS.

7. In ROLL SETTINGS, ensure that AUTO ROLL is not checked.

8. Click on the FIRST DATE IN CURRENT DATAVIEW. Then select the desired date.

9. [Optional for colleges that wish to have a variable size CURRENT DATA VIEW based on any day of the week] Change the number of days in CURRENT DATA VIEW. The following is an example:

   If today is Wednesday and the Current Data View should include today, Thursday and Friday of this week and all five days of next week, the CURRENT DATA VIEW SIZE should be set at 8. This setting will permit the 3 remaining days of this week plus all 5 days of next week to be included in the Current Data View.

   On the next day (e.g., Thursday), click on that date in FIRST DATE IN CURRENT DATA VIEW and re-set the CURRENT DATA VIEW SIZE to 7. This setting will permit the Current Data View to roll forward one day (pushing yesterday, Wednesday, to History Data View), but preserving the remaining days in the Current Data View without adding a new day.

   On the next day (e.g., Friday), click on that date in FIRST DATE IN CURRENT DATA VIEW and re-set the CURRENT DATA VIEW SIZE to 6. This setting will permit the Current Data View to roll forward one day (pushing yesterday, Thursday, to History Data View), but preserving the remaining days in the Current Data View without adding a new day.

10. Click on OK to return to LOCATION MAINTENANCE.

11. Close down THE GRID and then reopen it. This action will refresh THE GRID to reflect the change.

Note
Repeat the steps outlined above whenever THE GRID needs to be moved forward in time.

4.6.2 Establish Other Settings

1. Click on UTIl on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Select the desired Location.

5. Click on PROPERTIES.

6. Click on DATABASE SETTINGS.

7. In the OTHER SETTINGS panel, click on KEEP DATABASE OPEN to keep the SARS database open at all times. This will greatly increase the performance of SARS·GRID. If using Access 2000, always leave open. If using a client server database, make sure you have a sufficient number of licenses to cover all users before selecting this option.

8. To continue with the initial set-up for this Location, proceed to "Set Up ODBC Lookup to Host" in Section 4.6.3 below.

   -or-

9. Click on OK to return to LOCATION MAINTENANCE.

4.6.3 Set up ODBC Lookup to Host

Use Open Database Connectivity (ODBC) to allow real time access to your college's student database while making appointments. SARS Software Products, Inc. has a standard procedure for ODBC access that will retrieve student ID, student name, birth date, and telephone number. If this format does not match your requirements, SARS·GRID may be customized to match your requirements. There is a charge for customization.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

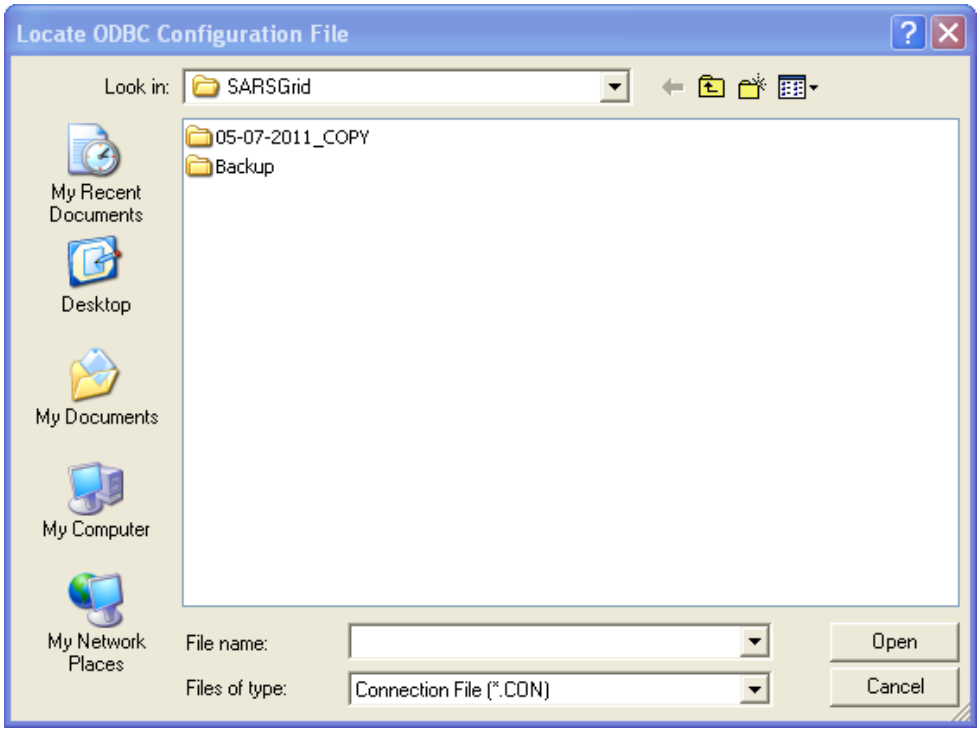
5. Click on PROPERTIES.

6. Click on DATABASE SETTINGS.

7. Click on USE ODBC.

8. The location of the SARS Database will be initially set up by the install program. To change the location, click on the box adjacent to CONFIGURATION FILE. This will display a screen that allows for searching all disk drives and directories.

Here is an example of the screen:



9. Click on the appropriate drive and directory, and the ODBC file (e.g., SARSODBC.con).

10. Click on OPEN to approve the entries. You will be returned to the DATABASE SETTINGS screen, and the selected file will be displayed in the Configuration File field.

11. Click on USER NAME and type in the identification that will be used to gain access to the ODBC data source.

12. Click on PASSWORD and type in the password corresponding to the USER NAME.

13. Click on OK to return to LOCATION MAINTENANCE.

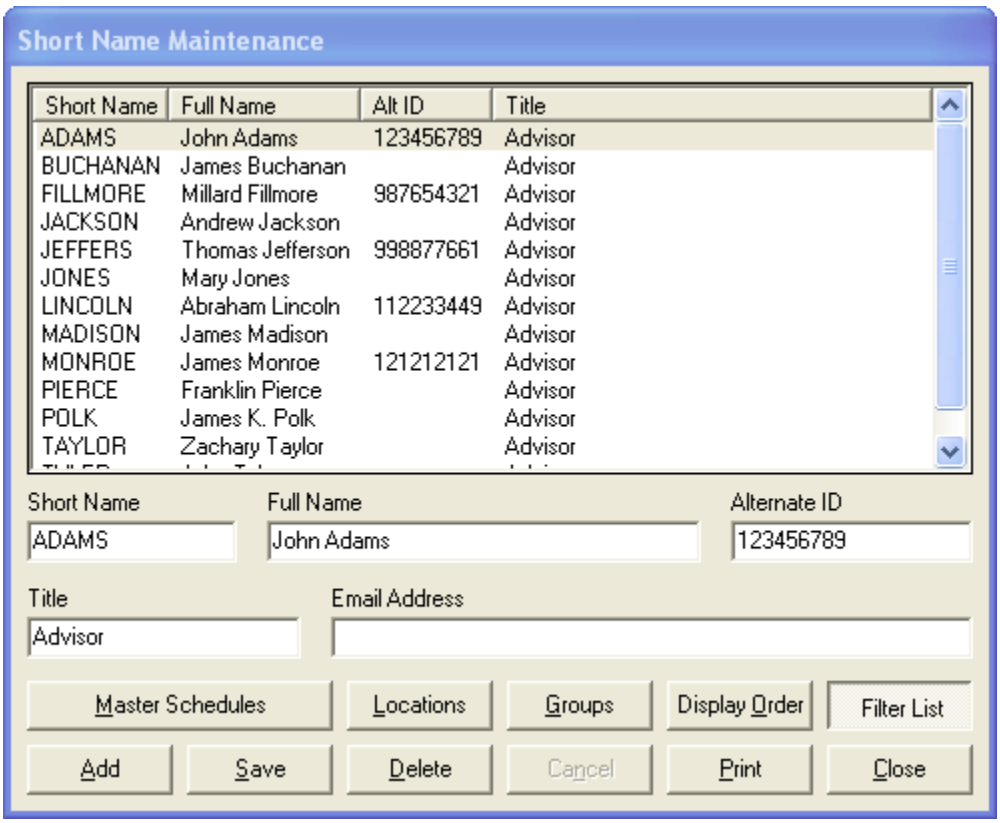
14. Click on CLOSE.

15. To continue with the initial set-up, proceed to "SHORT NAME MAINTENANCE" in Section 4.7 of this Part.

4.7 Short Name Maintenance

The Short Name Maintenance screen is used to add, change information about, and delete advisors from the system (including assigning advisors to Locations and student names), to make an advisor's name and schedule inactive and to designate the name for use with the web interface, and to establish and print master schedules.

Here is an example of the screen layout.



The following options appear on this screen:

- SHORT NAME: Use to enter an abbreviation that will be used to identify an advisor throughout the system. A Short Name is required for each advisor.
- FULL NAME: Use to enter or change an advisor's name that will be displayed on reports and some screens.
- ALTERNATE ID: Use, as desired, to enter a school-assigned identification for an advisor, such as Ellucian's Banner® or Colleague® ID. This ID may be alpha or numeric and has no specified format.
- TITLE: Use to establish for the appointment receipt the title of the person with whom an appointment is being scheduled (for example, Advisor).
- EMAIL ADDRESS: Use to enter or change an advisor's email address.

- MASTER SCHEDULES: Use to hold the routine activities that the advisor will be performing.
- LOCATIONS: Use to assign a selected advisor to one or more Locations and to specify alpha name ranges for assigning students to advisors.
- GROUPS: Use to assign one or more specialization groups to an advisor for the purpose of facilitating appointment scheduling.
- DISPLAY ORDER: Use to customize the order in which Short Names will be displayed on THE GRID (use only after all names have been added for a particular Location).
- FILTER LIST: Use as a toggle to display (1) only the advisors assigned to locations to which the user has access (the default mode), or (2) all users in the database. When pressed in, the filter is on; when released, the filter is off and all users are listed. The purpose of toggling to "All Users" is to allow administrators to assign Short Names from other Locations to their own Location with any appropriate access rights.
- ADD: Use to make fields available to enter new data.
- SAVE: Use to save new entries or changes made on the screen.
- DELETE: Use to remove data.
- CANCEL: Use to terminate the action without saving.
- PRINT: Use to initiate printing of the Master Schedule report.
- CLOSE: Use to exit the screen.

4.7.1 Add an Advisor

Advisor names must be added to the system before scheduling can occur. These names are typically displayed alphabetically by Short Name on THE GRID (see Step 5 below). If advisors are to be assigned to more than one Location, the same name must be used in all of those Locations. If advisors will be using the system, their names must be entered on both the SHORT NAME MAINTENANCE and the USER NAME MAINTENANCE screens. (See "Add a User Name" in this Part, Section 4.9.1.)

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on SHORT NAME MAINTENANCE. A list of advisors who have already been added to the system will be displayed. If the name is "enabled," the advisor has already been added to your Location. If the name is "disabled" (grayed out), another Location to which you do not

have access to Short Name Maintenance has added the advisor to its own Location. (See "Change Information About a Short Name" in this Part, Section 4.7.2, below.)

4. If the name of the advisor does not appear on the list, click on ADD.

5. Type the abbreviated name of the advisor in SHORT NAME. The field will accept up to 20 characters, with the narrowest possible column on THE GRID accommodating up to eight characters. All advisors MUST be assigned a SHORT NAME.

Note
The recommended SHORT NAME format is up to eight characters of the advisor's last name. When the SHORT NAME is longer than eight characters, it may be truncated and not easily identifiable in a narrow column. We recommend that the name be created so as to ensure easy recognition of the advisor on the display.

6. Type the advisor's first and last name in FULL NAME. Do not use commas to separate the name. The field will accept up to 30 characters.

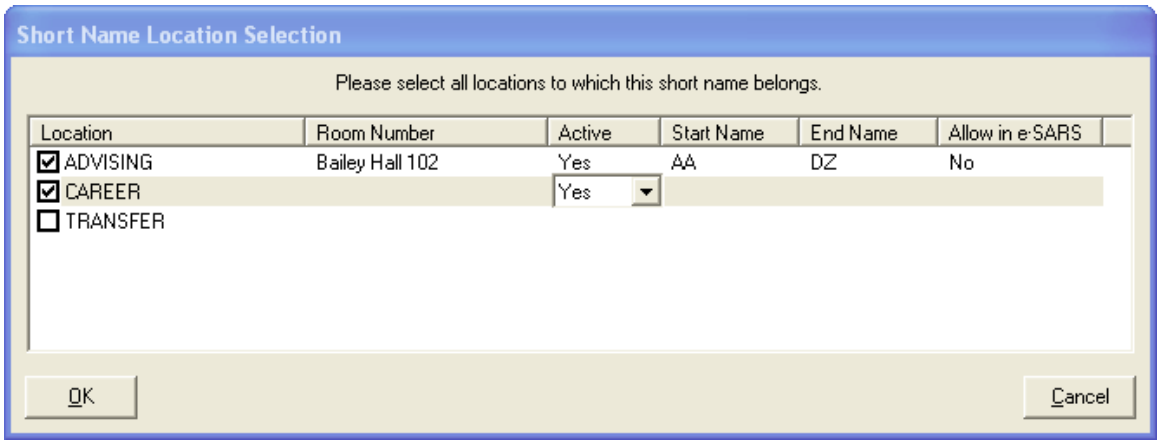
7. [Optional] Type the school-assigned alternate identification for the advisor in ALTERNATE ID. The field will accept up to 50 characters. An entry in this field is required if the school will be extracting data from SARS·GRID to Ellucian's Colleague system.

8. On the appointment receipt, the title of the person with whom an appointment has been scheduled defaults to "Advisor." This title should be changed for any person who is not an advisor (for example, a tutor). To change, enter the new title in TITLE. The field will accept up to 15 characters.

9. Click on EMAIL ADDRESS and type in the email address of the advisor. This address must be the one that is provided by the college (and it must correspond with the advisor's calendar in Microsoft Outlook™ if schedules are to be exported to Outlook).

10. An advisor must be assigned to at least one Location. Click on LOCATIONS. A SHORT NAME LOCATION SELECTION screen will be displayed.

    Here is an example:



The options are:

- LOCATION: Use to select the Location(s) to which the advisor will be assigned.

- ROOM NUMBER: Use to display the advisor's room number for the adjacent Location. This room number will be displayed on the STUDENT APPOINTMENT screen and on the appointment receipt in order to advise the student of the location of the scheduled appointment.
- ACTIVE: Use to hide or display an advisor's name on the drop down menu of advisor names and the advisor's schedule on THE GRID for the selected Location.
- START NAME: Use to type in the alpha character(s) representing the beginning of the name range of students assigned to this advisor (e.g., A).
- END NAME: Use to type in the alpha character(s) representing the end of the name range of students assigned to this advisor (e.g., DAW).
- ALLOW IN *e*·SARS: Use to display an advisor's name on the list of advisors in *e*·SARS.

Note
Only those Locations to which the user has access will be displayed. If an advisor needs to be added to a Location that is not displayed, a user who has access to that other Location must make the assignment.

a. Uncheck the Location that is displayed as selected if that Location is not one to which the advisor will be assigned. (The Location Selection screen always defaults to the Primary Location of the user setting up the system.)

b. Click on each Location to which the selected advisor is to be assigned.

Note
To enable an advisor to display other locations on MY GRID, assign that advisor to the other locations on User Name Maintenance using his/her existing user name. Do not add the advisor as a new user. (See "Assign a User Name to Additional Locations" in Section 4.9.2 of this Part).

c. Click on the line in the Room Number column for the applicable Location and enter the room number if the room number of the advisor is to be displayed on appointment receipts. The field will accept up to 50 characters.

d. Click on the line in the Active column for the applicable Location and then click on ▼ to select either YES (to indicate that the advisor will be active in that Location) or NO (to indicate that the advisor will be inactive in that Location). The default is set at YES.

Notes
The "inactive" designation hides the advisor's name from the drop down list on The GRID and hides the advisor's schedule on THE GRID. In the "inactive" mode, <u>all</u> of the advisor's schedule information (whether History, Current or Future) and records will be hidden; however, all historical information will continue to be included in reports generated using student histories.

If an advisor's schedule for the period of his/her absence had already been added to THE GRID, delete that schedule before designating the advisor as "inactive." See "Advisor Deletions" in Section 4.7.3 of this Part.

The timing of an "inactive" designation is important. If the designation is made too soon, the advisor's schedule will not be available for booking appointments, even if that individual has not yet departed. If the designation is made after the advisor has departed, his schedule will continue to be displayed erroneously on THE GRID if the advisor had a schedule that was built for a time period after his departure.

To re-activate an advisor, click on the line in the Active column for the applicable Location and then click on ▼ to select YES.

e. If student assignments are to be made to this advisor, click on START NAME to open a data field. Then type in the alpha character(s) representing the beginning of the name range of students assigned to this individual (e.g., A).

f. If student assignments are to be made to this advisor, click on END NAME to open a data field. Then type in the alpha character(s) representing the end of the name range of students assigned to this individual (e.g., DAW).

g. If you wish the advisor's name to be displayed to students using *e*·SARS to schedule their own appointments, click on the line in the ALLOW IN *e*·SARS column for the applicable Location and then click on ▼ to select YES.

h. Click on OK to return to the SHORT NAME MAINTENANCE screen.

11. You do not need to use GROUPS at this time. This feature is optional. If you wish to use Groups, they must first be established. (See "Group Codes" in Section 5.3 and "Assign a Short Name to a Specialty Group" in Section 5.3.4 of this Part).

12. Click on SAVE.

13. If you wish to enter data now on the advisor's activities, click on MASTER SCHEDULES and enter his or her schedule. (See "Create a Master Schedule" and "Add Schedules to THE GRID" in Part II, Sections 6 and 7.)

14. At this point if you have entered the advisor's schedule, you have two options for adding information to THE GRID. (See "Add Schedules to THE GRID" in Part II, Section 7.)

4.7.2 Change Information about a Short Name

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on SHORT NAME MAINTENANCE. A list of advisors who have already been added to the system will be displayed. (If a name is "disabled" (grayed out), the only change that can be made is to assign the name to your Location. Skip to step 6, below.)

Note
If the desired short name is not displayed, it may be because the Filter List toggle option is activated. Click on FILTER LIST to display all possible names. In the "All Users" mode, any Short Name that is grayed out is not assigned to the current Location. The administrator may select that name, however, and then click on Locations to make the assignment.

4. Click on the selected advisor. The existing information for those fields will appear in the boxes below.

5. To change the Short Name, Full Name, Alternate ID, or Title, enter the information in the space(s) provided.

6. Click on LOCATIONS.

   a. To assign or unassign the advisor to a Location, select or deselect the applicable Location checkbox. An advisor may only be unassigned from a Location if no appointments or other data are scheduled on THE GRID for that Location.

   b. To change the room number, click on the line in the Room Number column for the applicable Location. Enter or overwrite the room number to be displayed on the appointment receipt. The field will accept up to 50 characters.

   c. To change the advisor's availability for students to schedule their own appointments using *e*·SARS, check or uncheck the ALLOW IN *e*·SARS checkbox.

   d. To change the advisor's active/inactive status, click in the line in the Active column for the applicable Location. Then click on ▼ to change the selection to either YES (to indicate that the individual will be active in that Location) or NO (to indicate that the individual will be inactive in that Location).

   e. To change student assignments for this advisor, click on START NAME to open a data field. Then type in the alpha character(s) representing the beginning of the name range of students assigned to this individual (e.g., A).

   f. To change student assignments for this advisor, click on END NAME to open a data field. Then type in the alpha character(s) representing the end of the name range of students assigned to this individual (e.g., DAW).

Notes
Advisors' schedules cannot be moved from one Location to another. If an advisor moves to another Location, all of that individual's schedule and appointment data for the former Location will be retained in that Location.

To reassign an advisor to a different Location, first make that individual inactive in the prior Location and then click on the checkbox for the new Location on the SHORT NAME LOCATION SELECTION screen. Once an individual has been assigned to a new Location, a new master schedule template must be created and added to THE GRID.

   g. Click on OK to return to the SHORT NAME MAINTENANCE screen.

8. To change the GROUP designations for an advisor, see "Assign a Short Name to a Specialty Code Group" in Section 5.3.4 in this Part.

9. Click on SAVE.

10. Click on CLOSE.

4.7.3 Advisor Deletions: Overview

This section discusses options for deleting an advisor who has left the department permanently or for deleting data for an advisor who has left the department temporarily. These options are:

• FULL DELETE (ADVISOR, TEMPLATES, AND DATA FROM THE GRID):	Use to delete from the application all record of an advisor, except for student appointment history. Any reports generated using student histories will continue to retain information associated with the advisor, if ALL advisors are included in the reports.
• PARTIAL DELETE (DATA FROM THE GRID ONLY):	Use to delete from THE GRID data for a specified advisor.

Warnings
When an advisor name is deleted, all associated data, other than student histories, will be also deleted from THE GRID. Although a previously-deleted advisor name may be restored, all schedule and report data for that advisor name cannot be restored.

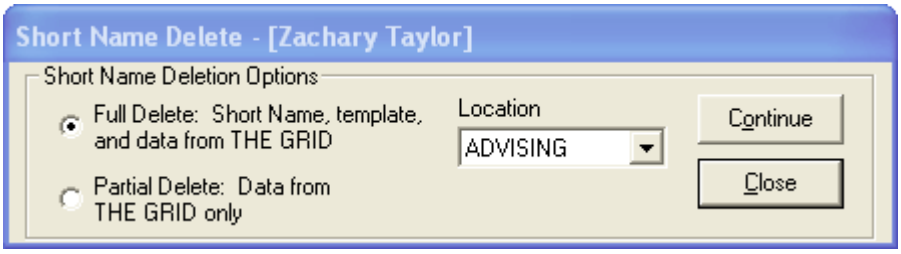
Because a full delete preserves only a reference to the Short Name of the advisor stored with the appointment history for the student, it is recommended that, rather than fully deleting an advisor immediately after his/her departure, you delete from THE GRID only the individual's schedule from the departure date forward and then make the individual "inactive" (see "Change Information about a Short Name" in Section 4.7.2, above). Only perform a full delete when you no longer have a need to generate reports about the advisor.

▶ Fully Delete a Short Name from a Location

A Short Name may be deleted only after all outstanding appointments scheduled for that individual have been cancelled or rescheduled with another advisor.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on SHORT NAME MAINTENANCE.
4. Click on the selected Short Name. The existing information for that individual will appear in the boxes below.
5. Click on DELETE to display a screen that provides deletion options.
6. Click on FULL DELETE: SHORT NAME, TEMPLATE, AND DATA FROM THE GRID.

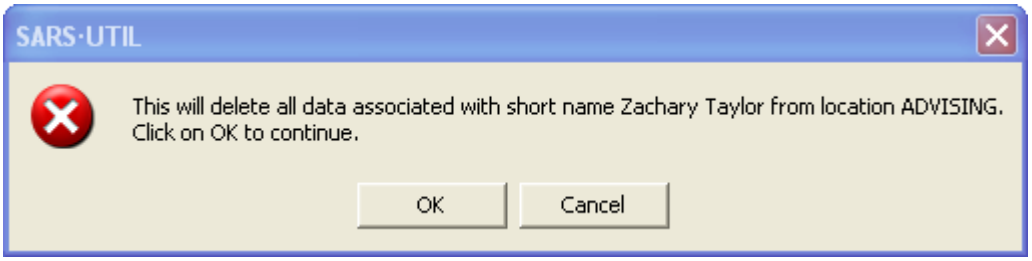
The screen will look like this:



7. Click on LOCATION ▼ and then select the Location from which the individual will be deleted.

Warning
Be sure to select the proper Location if the individual works in more than one Location.

8. Click on CONTINUE. A confirmation message will appear. Here is an example:



9. Click on OK.

10. If applicable, repeat steps 4 – 9 to delete the individual from another Location.

11. Click on CLOSE.

Note
If a Short Name that has been assigned to more than one Location is deleted only from one Location, that name will continue to be displayed on the SHORT NAME MAINTENANCE screen (in a disabled mode) until all other Locations have also deleted the Short Name for their Locations.

▶ Delete Data from THE GRID Only

1. Click on UTIL on the SARS·MENU.

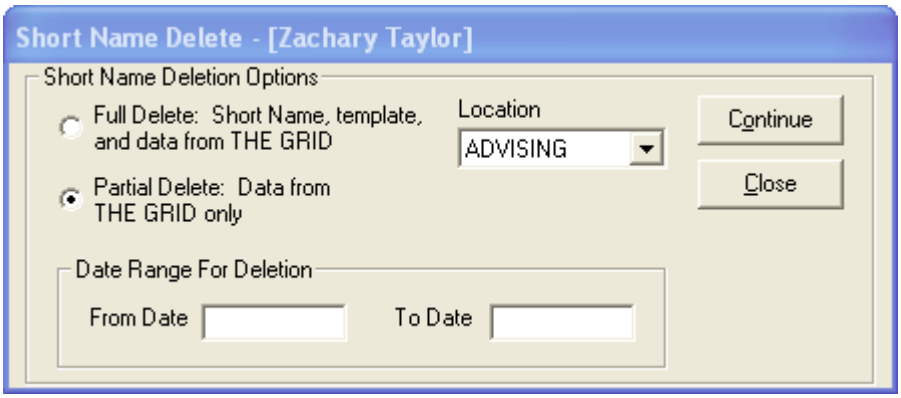
2. Click on SYSTEM ADMINISTRATION.

3. Click on SHORT NAME MAINTENANCE.

4. Click on the selected Short Name. The existing information for that individual will appear in the boxes below.

5. Click on DELETE to display a screen that provides deletion options.

6. Click on PARTIAL DELETE: DATA FROM THE GRID ONLY. The screen displays the fields for entering the date range for the deletion. It looks like this:



7. Click on LOCATION ▼ and then select the Location from which the Short Name will be deleted.

Warning
Be sure to select the proper Location if the advisor works in more than one Location.

8. Click on FROM DATE and then enter the date.

9. Click on TO DATE and then enter the date.

10. Click on CONTINUE. If you have not entered a From Date and/or To Date, an error message will be displayed.

    a. Click on OK to acknowledge the message.

    b. Enter the missing data, and then click on CONTINUE. Otherwise, the following message will appear:

11. Click on OK.

12. If applicable, repeat steps 4 – 11 to delete data from another Location.

13. When done, a message will be displayed confirming that the deletion has been performed. Click on OK.

14. Click on CLOSE.

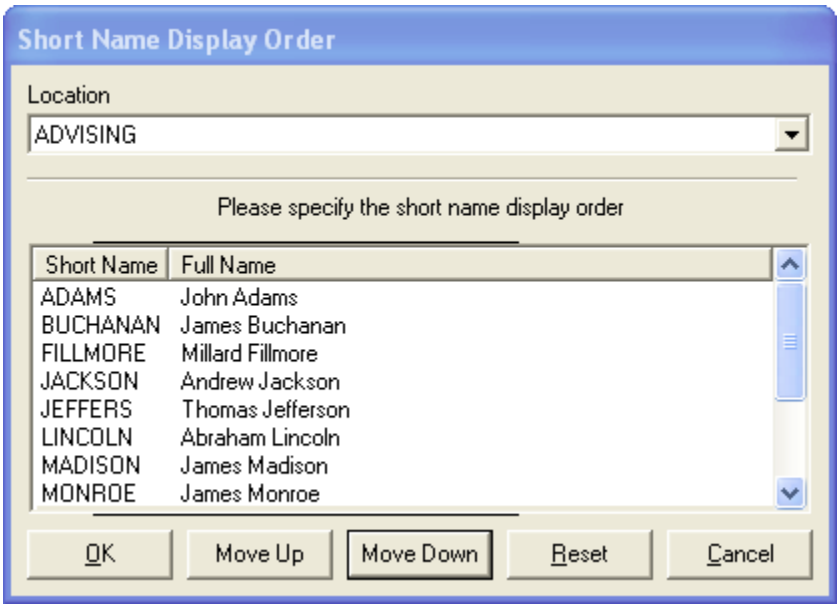
Reminder
If you have a need to hide the advisor's name and schedule temporarily, see "Change Information about a Short Name" in Section 4.7.2 in this Part.

4.7.4 Change the Display Order of Short Names on THE GRID
[optional]

The default order in which Short Names are listed on THE GRID is alphabetical. This optional feature is useful for Locations with many Short Names, thus requiring scrolling to find some names. Short Names of individuals who work full time might be displayed first, and part time names may be displayed at the end to have the display on THE GRID default first to the full-time Short Names.

If you wish to change the display order for a selected Location, follow the steps below:

1. From the SHORT NAME MAINTENANCE screen, click on DISPLAY ORDER to display a SHORT NAME DISPLAY ORDER screen. Here is an example:



The options are:

- LOCATION: Use to select the Location for which the Short Name display order will be changed.
- OK: Use to approve the changes. (This option is enabled after a move has been made.)
- MOVE UP: Use to move the selected name up one level.
- MOVE DOWN: Use to move the selected name down one level.
- RESET: Use to reset the screen to the default alphabetical order of the advisors in the selected Location.

- CANCEL: Use to exit the SHORT NAME DISPLAY ORDER screen without saving the changes.

2. Click on LOCATION ▼ and select the Location for which the display order is to be changed (e.g., Advising).

3. Click on the first name that is to be moved either up or down in the display order. Then click on either MOVE UP or MOVE DOWN to move the name to the desired position in the list. (To move the name more than one line, repeat this step.)

4. Repeat step 3 to change the display order of each subsequent name.

5. When satisfied with the display order, click on OK.

6. Repeat steps 2 – 5 for other Locations.

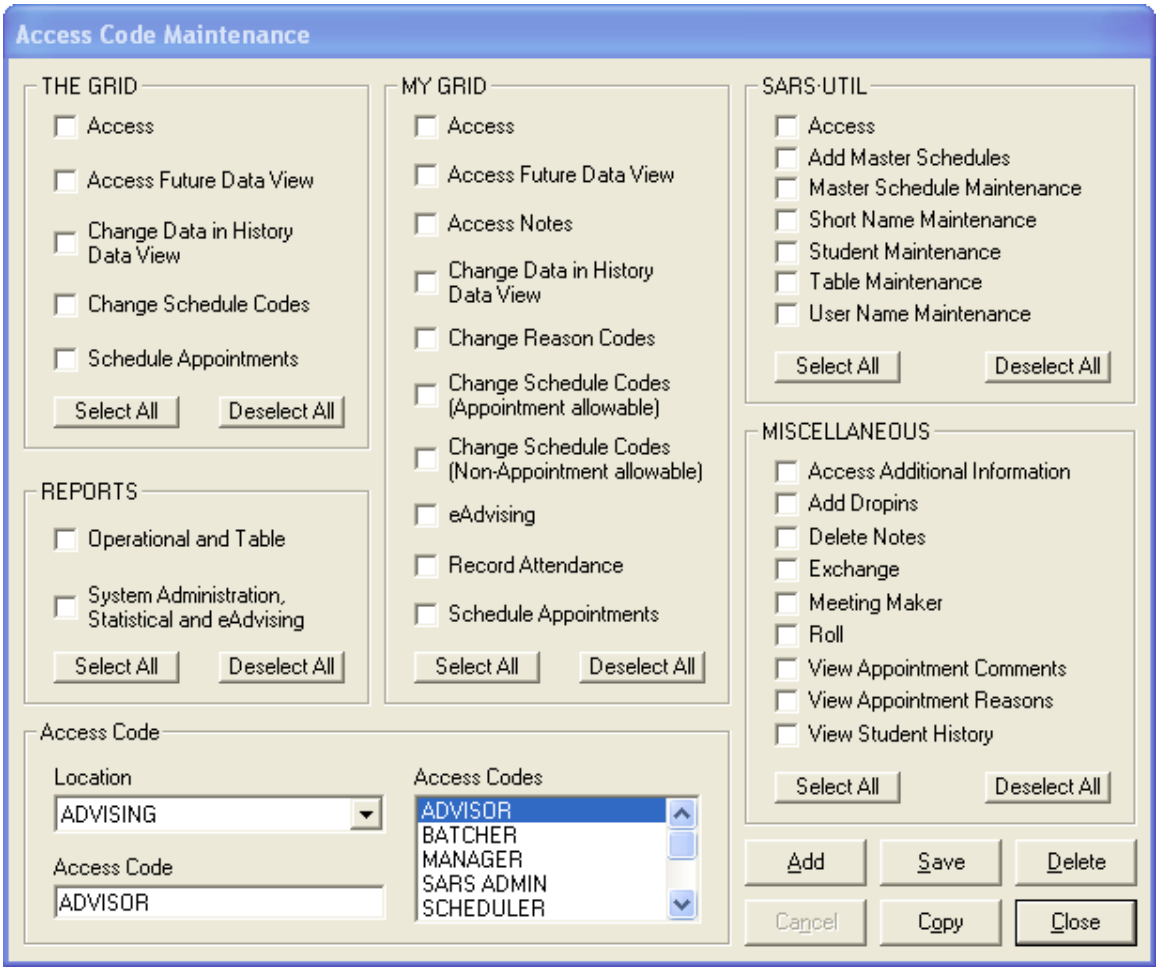
7. To reset the screen to its default alphabetical order, click on RESET.

8. Click on OK to exit the screen.

4.8 Access Code Maintenance

The Access Code Maintenance screen is used to add, delete, or change information on the categories of users (for example, advisor, scheduler, and system administrator). Each Access Code category is assigned rights to perform or view selected functions; then each user name is assigned to an Access Code category using User Name Maintenance (see “Add a User Name” in this Part, Section 4.9.1).

Here is an example of the screen layout.



The following options appear on this screen:

- THE GRID: Use to assign access to functions that are performed from THE GRID, as follows:

  ACCESS: Use to establish whether users assigned to the Access Code category may view THE GRID (in Current Data View only) for this Location. (This option must be selected if any other option is selected in THE GRID section.)

ACCESS FUTURE DATA VIEW: Use to establish whether users assigned to the Access Code category may perform actions in Future Data View on THE GRID.

CHANGE DATA IN HISTORY DATA VIEW: Use to establish whether users assigned to the Access Code category may perform scheduling actions in History Data View.

CHANGE SCHEDULE CODES: Use to establish whether users assigned to the Access Code category may make daily adjustments to an advisor's work schedule on THE GRID and whether they may change the maximum number of students allowed in a group appointment from the Roster.

SCHEDULE APPOINTMENTS: Use to establish whether users assigned to the Access Code category may schedule, copy, move, extend/unextend, and cancel student appointments, as well as mark attendance and record/view alerts, for all advisors on THE GRID.

SELECT ALL: Use to check all boxes in this panel.

DESELECT ALL: Use to uncheck all boxes in this panel.

- REPORTS: [**Caution** Reports contain personal student information, such as birth date, address and telephone numbers. Do not give this permission to any category of user (e.g., student employees) who should not have access to that personal information. See discussion on blocking student information at Section 4.5.16, Miscellaneous Settings.] Use to assign access rights to one or both of the following types of reports.

OPERATIONAL AND TABLE: Use to establish whether users assigned to the Access Code category may print operational and table reports. Operational reports display schedule information in a variety of formats. Table reports display the full descriptions of all the codes and names that were established in SARS·UTIL. Advisors do not need this access right to print their own schedules from MY GRID.

SYSTEM ADMINISTRATION, STATISTICAL AND eADVISING: Use to establish whether users assigned to the Access Code category may print statistical, system administration, and eAdvising reports. Statistical reports compile and enumerate appointment activities. Advisors do not need this access right to print their own schedules from MY GRID.

SELECT ALL: Use to check all boxes in this panel.

DESELECT ALL: Use to uncheck all boxes in this panel.

- MY GRID: Use to assign access to functions that are performed from MY GRID, an individual's own Grid, as follows:

ACCESS:	Use to establish whether users assigned to the Access Code category may view and perform actions on MY GRID. If this is the only access right granted for MY GRID, users will be able to view their own Grid, view and print their own schedules, and view/write alerts and record contacts. (This option must be selected if any other option is selected in the MY GRID section, except when establishing the option for notes within your location to be shared with advisors in other locations).
ACCESS FUTURE DATA VIEW:	Use to establish whether users assigned to the Access Code category may perform actions in Future Data View on MY GRID.
ACCESS NOTES:	Use to establish whether users assigned to the Access Code category may view, print, write and delete Private or Local notes in this Location, or to view and print Public notes in any Location.
CHANGE DATA IN HISTORY DATA VIEW:	Use to establish whether users assigned to the Access Code category may perform scheduling actions and mark attendance in History Data View from MY GRID. SCHEDULE APPOINTMENTS from MY GRID must also be granted to allow for scheduling actions. RECORD ATTENDANCE must also be granted to allow for marking attendance in History Data View. (Advisors may gain access to dates that are in History Data View without having this access right.)
CHANGE REASON CODES:	Use to establish whether users assigned to the Access Code category may change Reason Codes and comments for booked appointments from MY GRID.
CHANGE SCHEDULE CODES (APPOINTMENT ALLOWABLE):	Use to establish whether users assigned to the Access Code category may adjust their own daily work schedules, including changing appointment allowable Schedule Codes on MY GRID and whether they may change the maximum number of students allowed in a group appointment from the Roster. (For advisors to have the ability to change appointment allowable Schedules Codes, both appointment allowable and non-appointment allowable options must be selected.)
CHANGE SCHEDULE CODES (NON-APPOINTMENT ALLOWABLE):	Use to establish whether users assigned to the Access Code category may change only non-appointment allowable Schedule Codes on MY GRID.
eADVISING:	Use to establish whether users assigned to the Access Code category will have the ability to view questions sent by students via the eAdvising web module, respond to such questions, delete unanswered questions, archive questions, and print eAdvising reports. Users do not need this permission view eAdvising questions from the Notepad or Student History.

RECORD ATTENDANCE: Use to establish whether users assigned to the Access Code category may record a student's presence or absence for a scheduled appointment from MY GRID. Schedulers do not need this access right to record attendance.

SCHEDULE APPOINTMENTS: Use to establish whether advisors assigned to the Access Code category may schedule, copy, move, extend/unextend, and cancel student appointments for themselves.

SELECT ALL: Use to check all boxes in this panel.

DESELECT ALL: Use to uncheck all boxes in this panel.

- SARS·UTIL: Use to assign access to any of the following functions that are performed from SARS·UTIL:

ACCESS: Use to establish whether users assigned to the Access Code category may be given access to the SARS·UTIL toolbar.

ADD MASTER SCHEDULES: Use to provide users assigned to the Access Code category the ability to add master schedules to THE GRID after building them. (For advisors, selecting this option in conjunction with MASTER SCHEDULE MAINTENANCE will enable them to add their own schedules to THE GRID without giving them the SARS·UTIL ACCESS right (see above) which would otherwise give them access to other UTIL functions.)

MASTER SCHEDULE MAINTENANCE: Use to establish whether users assigned to the Access Code category may have access to the Master Schedule screen in SARS·UTIL solely to work with master schedule templates. (For advisors, selecting this single option will provide them access to record their own master schedules without giving them the SARS·UTIL ACCESS right (see above) which would otherwise give them access to other UTIL functions.)

SHORT NAME MAINTENANCE: Use to establish whether users assigned to the Access Code category may add, delete, or change information about advisors.

STUDENT MAINTENANCE: Use to establish whether users assigned to the Access Code category may add, delete, or change information about students on the STUDENT MAINTENANCE screen. This option is enabled only if the ACCESS option under SARS·UTIL is checked.

TABLE MAINTENANCE: Use to establish whether users assigned to the Access Code category may have access to and perform tasks in ID FORMAT MAINTENANCE and LOCATION MAINTENANCE. This access right also includes permission to establish and change Roll settings. Users who need access to

System Administration reports must be given access to this Access Code category. This option is enabled only if the ACCESS option under SARS·UTIL is checked.

USER NAME MAINTENANCE: Use to establish whether users assigned to the Access Code category may have access to User Name functions, including USER LOCATION SELECTION and ACCESS CODE MAINTENANCE. This option is enabled only if the ACCESS option under SARS·UTIL is checked.

SELECT ALL: Use to check all boxes in this panel.

DESELECT ALL: Use to uncheck all boxes in this panel.

- MISCELLANEOUS: Use to assign access rights to any of the following functions.

ACCESS ADDITIONAL INFORMATION: Use to provide users assigned to the Access Code category the ability to view (and usually record) Additional Information about a student in any Location to which the user is assigned.

ADD DROPINS: Use to provide users assigned to the Access Code category the ability to add students to the Drop-in screen. This access right will be pre-checked for any user with the SARS ADMIN user name.

DELETE NOTES: Use to provide users assigned to the Access Code category the ability to delete notes from the Notepad. Users must also have permission to ACCESS NOTES.

EXCHANGE: Use to establish whether users assigned to the Access Code category may exchange data between the SARS·Database and databases maintained by the school.

MEETING MAKER: Use to establish whether users assigned to the Access Code category may use SARS·GRID to schedule meetings.

ROLL: Use to establish that users assigned to the Access Code category will trigger a roll action when first signing on to THE GRID. This access right, in conjunction with the Table Maintenance permission, is also required for users who will be establishing Roll settings.

VIEW APPOINTMENT COMMENTS: Use to establish whether users assigned to the Access Code category will have the right to view appointment comments after appointments have been booked. If this option is not selected, comments will be viewable on the Student Appointment screen only when the appointment is first being booked. However, comments will still be viewable on Student History, if View History is selected.

VIEW APPOINTMENT REASONS: Use to establish whether users assigned to the Access Code category will have the right to view appointment

reasons after appointments have been booked. If this option is not selected, reasons will be viewable on the Student Appointment screen only when the appointment is first being booked. However, reasons will still be viewable on Student History, if View History is selected.

VIEW STUDENT HISTORY: Use to establish whether users assigned to the Access Code category will have be able to view a student's appointment and drop-in activity on the Student History screen. This access right must be assigned on a Location-by-Location basis.

SELECT ALL: Use to check all boxes in this panel.

DESELECT ALL: Use to uncheck all boxes in this panel.

- ACCESS CODE

  LOCATION: Use to select the Location for which access codes are being established.

  ACCESS CODES: Use to establish the category of users to which the selections will apply.

- ADD: Use to make fields available to enter new data.
- SAVE: Use to save new entries or changes made on the screen.
- DELETE: Use to remove data.
- CANCEL: Use to terminate the action without saving.
- COPY: Use to copy existing Access Codes from one Location to another.
- CLOSE: Use to exit the screen.

4.8.1 Add an Access Code

Recommendations:

- The security of the system is controlled in large part through User Name Maintenance and Access Code Maintenance. Therefore, we recommend that access to these functions be limited to one or two key individuals (for example, the System Administrator and his or her backup).
- We recommend that schedulers be excluded from accessing MY GRID in order to protect the confidentiality of notes written about students by advisors.
- If the Student Information blocking feature has been enabled (see Section 4.5.15, Student Information), we recommend that the REPORTS permissions not be assigned to student employees, as reports contain birth dates, addresses and telephone numbers.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on USER NAME MAINTENANCE.
4. Click on ACCESS CODE MAINTENANCE.
5. Click on LOCATION ▼ and then select the Location to which the Access Codes will apply.
6. Click on ADD. The cursor will move to the Access Code field.
7. Type in the name of the access code. For example, Scheduler. The field will accept up to 10 characters.
8. Check all access rights that apply, or click on SELECT ALL to check all Access Codes in each panel.
9. Click on SAVE.
10. Repeat steps 6 – 9 to add other Access Codes.
11. Click on CLOSE to exit the ACCESS CODE MAINTENANCE screen.
12. Click on CLOSE to exit the USER NAME MAINTENANCE screen.

4.8.2 Change Information about an Access Code

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on USER NAME MAINTENANCE.
4. Click on ACCESS CODE MAINTENANCE.
5. Click on the Location ▼ and then select the Location for which the access code is to be changed.
6. Click on the Access Code name for which access rights are to be changed.
7. Click on the checkboxes, as appropriate, to change the designations.
8. Click on SAVE.
9. Click on CLOSE to exit the ACCESS CODE MAINTENANCE screen.
10. Click on CLOSE to exit the USER NAME MAINTENANCE screen. The change will take effect the next time a user affected by the change logs onto the system.

Note: To uncheck the Access permission under SARS·UTIL, you must first uncheck the Student Maintenance, Table Maintenance and/or User Name Maintenance permissions.

4.8.3 Delete an Access Code

Only unassigned Access Codes may be deleted. If any users are assigned to a particular Access Code that you wish to delete, reassign those users to a different code. Then you may delete the newly unassigned Access Code by following the steps below.

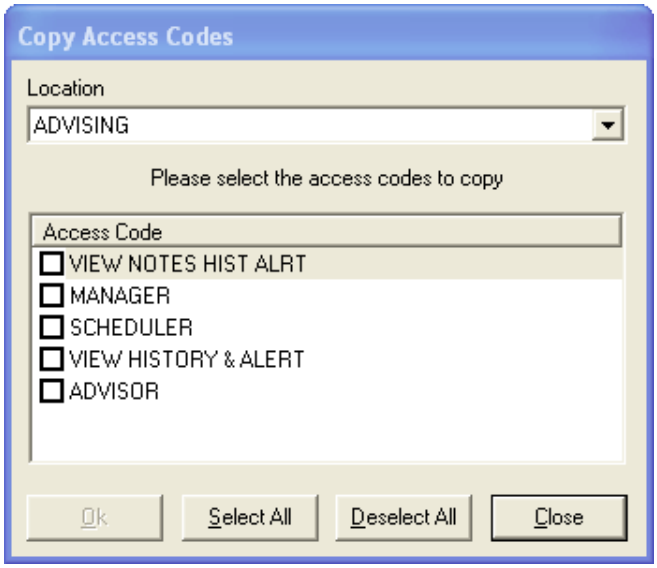
1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on USER NAME MAINTENANCE.
4. Click on ACCESS CODE MAINTENANCE.
5. Click on the Location ▼ and then select the Location for which the access code is to be deleted.
6. Click on the Access Code name to be deleted.
7. Click on DELETE. A confirmation message will appear.
8. Click on YES to confirm the deletion.
9. Click on CLOSE to exit the ACCESS CODE MAINTENANCE screen.
10. Click on CLOSE to exit the USER NAME MAINTENANCE screen.

4.8.4 Copy an Access Code

Any Access Code that has been created for one Location in the same database may be selected for use by other Locations via the COPY function.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on USER MAINTENANCE.
4. Click ACCESS CODE MAINTENANCE.
5. Select the Location to which access codes are to be copied.
6. Click on COPY. A COPY ACCESS CODES sub-screen will be displayed.

Here is an example:



The options are:

- LOCATION: Use to select the location from which existing Access Codes are to be copied.
- ACCESS CODE: Use to check the boxes for the Access Codes to be copied.
- OK: Use to approve the selections.
- SELECT ALL: Use to check all of the Access Codes for copying to your Location.
- DESELECT ALL: Use to deselect all the Access Codes.
- CANCEL: Use to exit the screen without saving the selections.

7. Click on LOCATION ▼ and select the Location <u>from</u> which existing Access Codes are to be copied.

   Click on the checkbox adjacent to each Access Code to be copied <u>to</u> the current Location. Any or all of the codes may be selected. The OK button will be enabled after the first Access Code is selected.

   -or-

   Click on SELECT ALL to check all boxes.

8. Click on OK. The selected Access Codes will appear on the ACCESS CODE MAINTENANCE screen for that Location.

9. Click on OK.

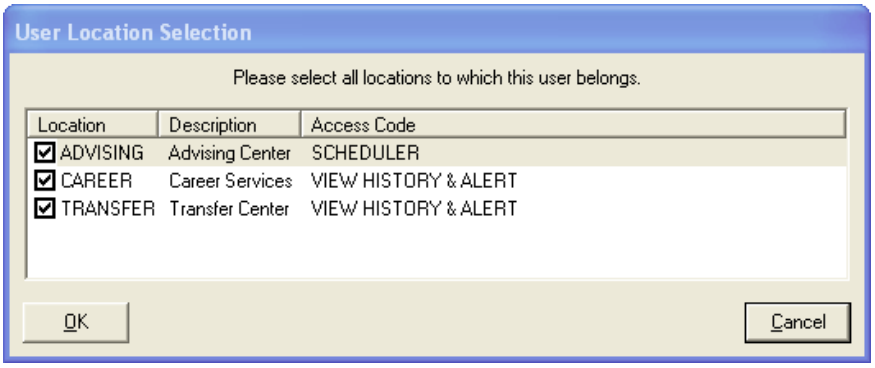
4.8.5 Special Situations

Users with the relevant access permissions may view student history, alerts, and LOCAL notes only for their own Location(s). By default, they cannot view such information from unassigned Locations (unless the author of a Note designates its visibility as PUBLIC). However, in certain circumstances you may wish to allow outside users to view student history, alerts and Local (non-Public) notes created in your Location without their ability to otherwise have access to your Location. In order to share such information, a special Access Code must be created.

▶ **Viewing Student History and Alerts**

To share student history (which by default also provides access to alerts), follow the steps below:

1. First, create a new Access Code (e.g., VIEW HISTORY & ALERT) in your Location.
2. Then click on the MISCELLANEOUS – VIEW STUDENT HISTORY access permission checkbox. Do not check any other access permissions.
3. Click on SAVE.
4. Click on CLOSE to return to the USER NAME MAINTENANCE screen.
   a. Click on the name of the user with whom you wish to share the student history and alerts from your Location.
   b. Click on LOCATION to open the User Location Selection screen.
   c. Click on the checkbox adjacent to your Location.
   d. Click on ACCESS CODE ▼ and select the special Access Code that has been created (e.g., VIEW HISTORY & ALERT).
   e. Click on OK. Here is an example of the User Location Selection screen for a Scheduler who regularly works in the Advising Center but has been given the right to view Student History and Alerts from Career Services and the Transfer Center.



When this outside user opens the Student History screen or views Alerts from his or her own Location(s), the list (whether student history or alerts) will include information from your Location, as well.

▶ Viewing Notes, Student History and Alerts

To share Local Notes (which by default also provides access to student history and alerts) to users who do not have Access Notes permission in your location, follow the steps below:

1. First, create a new Access Code (e.g., VIEW NOTES HIST ALRT).

2. Then click on the MY GRID – ACCESS NOTES access permission for your Location. If you additionally wish to share student history with users assigned to this Access Code, also click on the MISCELLANEOUS – VIEW STUDENT HISTORY access permission checkbox. Otherwise, do not check any other access permissions.

3. Click on SAVE.

4. Click on CLOSE to return to the USER NAME MAINTENANCE screen.

   a. Click on the name of the user with whom you wish to share the Notes.

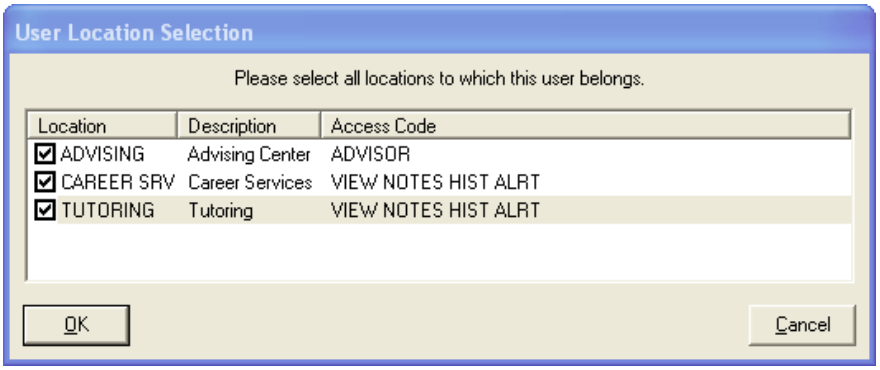
   b. Click on LOCATION to open the User Location Selection screen.

   c. Click on the checkbox adjacent to your Location.

   d. Click on ACCESS CODE ▼ and select the special Access Code that has been created (e.g., VIEW NOTES HIST ALRT).

   e. Click on OK.

   Here is an example of an Advisor who regularly works in the Advising Center but has been given the right to view Local Notes, student history information, and alerts created by the Career and the Transfer Centers.



When this outside user views Notes from his or her own Location(s), the list will include Local Notes from your Location, as well. The user with this access right will also be able to view student history and alerts about your Location.

(Also see “Assign a User Name to Additional Locations” at Section 4.9.2 in this Part.)

4.8.6 Summary of Access Permissions by Function

Function	Required Access Codes	Optional Access Codes
Access Code Maintenance	SARS·UTIL -- Access SARS·UTIL -- User Name Maintenance	
Add an Occasional Saturday or Sunday	SARS·UTIL -- Access SARS·UTIL -- Master Schedule Maintenance SARS·UTIL -- Table Maintenance	
Additional Contacts: Create Categories	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Additional Information: Create Categories	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Additional Information: Enter	THE/MY GRID -- Access MISCELLANEOUS -- Access Additional Information	
Address Information	THE/MY GRID -- Access	
Alerts	Functionality only from COMMAND MENU THE/MY GRID -- Access Functionality from STUDENT APPOINTMENT screen THE/MY GRID -- Schedule Appointments Create and delete Global Alerts and change Standard and Student Alerts created by others SARS·UTIL -- User Name Maintenance	
Attendance: Record from MY GRID	MY GRID -- Access MY GRID -- Record Attendance	MY GRID -- Change Data in History Data View
Attendance: Record from THE GRID	THE GRID -- Access THE GRID -- Schedule Appointments	THE GRID -- Change Data in History Data View
Change Column from MY GRID	MY GRID -- Access MY GRID -- Change Schedule Codes (Appointment allowable) MY GRID -- Change Schedule Codes (Non-Appointment allowable)	MY GRID -- Access Future Data View MY GRID -- Change Data in History Data View
Change Column from THE GRID	THE GRID -- Access THE GRID -- Change Schedule Codes	THE GRID -- Access Future Data View THE GRID -- Change Data in History Data View
Change Schedules Codes from MY GRID	MY GRID -- Access MY GRID -- Change Schedule Codes (Appointment allowable) MY GRID -- Change Schedule Codes (Non-Appointment allowable)	MY GRID -- Access Future Data View MY GRID -- Change Data in History Data View
Change Schedules Codes from THE GRID	THE GRID -- Access THE GRID -- Change Schedule Codes	THE GRID -- Access Future Data View THE GRID -- Change Data in History Data View
Configure Drop-in Screen (after initial settings)	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Copy Appointment	THE/MY GRID -- Access THE/MY GRID -- Schedule Appointments	THE/MY GRID -- Access Future Data View THE/MY GRID -- Change Data in History Data View

Function	Required Access Codes	Optional Access Codes
Database Settings	SARS·UTIL -- Access SARS·UTIL --Table Maintenance	
Delete Column NOT available on MY GRID	THE GRID -- Access THE GRID -- Change Schedule Codes	THE GRID -- Access Future Data View THE GRID -- Change Data in History Data View
eAdvising	MY GRID -- eAdvising	
Enter/Change Comments	THE GRID -- Access THE GRID -- Change Schedule Codes -or- THE GRID -- Schedule Appointments	THE GRID -- Access Future Data View THE GRID -- Change Data in History Data View
Enter/Change Comments	MY GRID -- Access MY GRID -- Change Reason Codes	MY GRID -- Access Future Data View MY GRID -- Change Data in History Data View
Excluded Date Maintenance	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Export Schedule to MS Outlook	MY GRID -- Access	
Export to Host System	MISCELLANEOUS -- Exchange	
Extend or Unextend Appointment	THE/MY GRID -- Access THE/MY GRID -- Schedule Appointments	THE/MY GRID -- Access Future Data View THE/MY GRID -- Change Data in History Data View
GRID Settings	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Group Codes	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
ID Format Maintenance	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Location Maintenance	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Lock or Unlock Column	THE/MY GRID -- Access THE/MY GRID -- Schedule Appointments	THE/MY GRID -- Access Future Data View
Master Schedule: Add to THE GRID (advisor's own schedule only)	SARS·UTIL -- Master Schedule Maintenance SARS·UTIL -- Add Master Schedules	Short Name must be individual advisor's own Short Name.
Master Schedules: Add to THE GRID (for multiple advisors)	SARS·UTIL -- Master Schedule Maintenance SARS·UTIL -- Add Master Schedules	Short Name must be NONE or ALL.
Master Schedules: Create/ Modify (for multiple advisors)	SARS·UTIL -- Master Schedule Maintenance	Short Name must be NONE or ALL.
Master Schedules: Create/Modify (advisor's own schedule only)	SARS·UTIL -- Master Schedule Maintenance	Short Name must be individual advisor's own Short Name.
Move Appointment	THE/MY GRID -- Access THE/MY GRID -- Schedule Appointments	THE/MY GRID -- Access Future Data View THE/MY GRID -- Change Data in History Data View
Notepad	MY GRID -- Access MY GRID -- Access Notes	
Notes – Delete All Notes (Manager)	MISCELLANEOUS -- Delete Notes	Short Name must be ALL
Notes – Delete Own Notes	MISCELLANEOUS -- Delete Notes	Short Name must be user's own Short Name.
Printer Settings	SARS·UTIL -- Access	

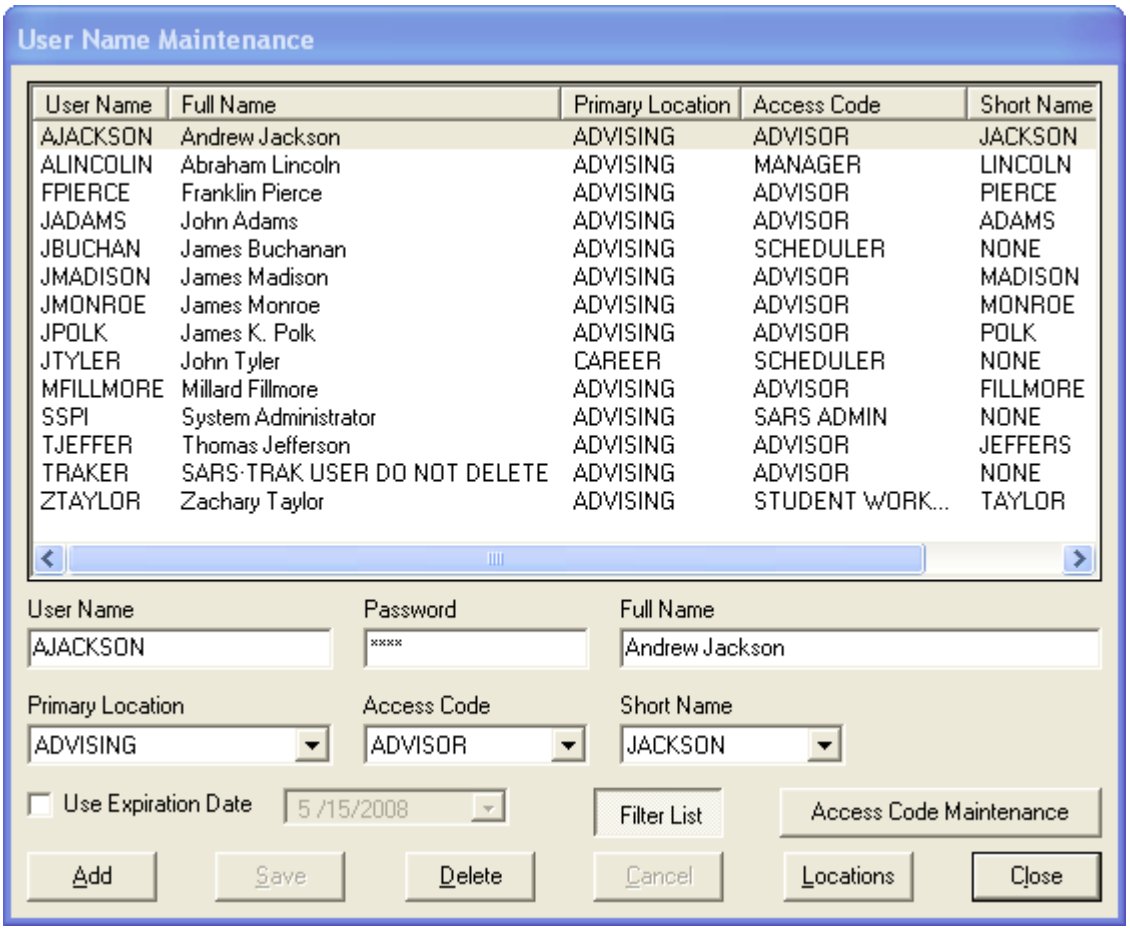
Function	Required Access Codes	Optional Access Codes
	SARS·UTIL -- Table Maintenance	
Quick Day Attend (advisors)	MY GRID -- Access MY GRID -- Record Attendance	MY GRID -- Change Data in History Data View
Quick Day Attend from THE GRID	THE GRID -- Access	THE GRID -- Change Data in History Data View
Quick Day Change (advisors)	MY GRID -- Access MY GRID -- Change Schedule Codes (appointment allowable) MY GRID -- Change Schedule Codes (non-appointment allowable)	MY GRID -- Access Future Data View MY GRID -- Change Data in History Data View
Quick Day Change (schedulers)	THE GRID -- Access THE GRID -- Change Schedule Codes	THE GRID -- Access Future Data View THE GRID -- Change Data in History Data View
Reason Code Maintenance	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Reason Codes (advisors)	MY GRID -- Access MY GRID -- Change Reason Codes	MY GRID -- Access Future Data View MY GRID -- Change Data in History Data View
Reason Codes (schedulers)	THE GRID -- Access THE GRID -- Schedule Appointments	THE GRID -- Access Future Data View THE GRID -- Change Data in History Data View
Receipt Settings	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Reports - Operational	REPORTS -- Operational & Table	
Reports - Statistical	REPORTS –System Administration, Statistical, & eAdvising	
Reports - System Administration	REPORTS –System Administration, Statistical, & eAdvising	
Reports - Table	REPORTS -- Operational & Table	
Roster: Change Maximum # of Students Allowed	THE/MY GRID -- Access SARS·UTIL --Table Maintenance	THE/MY GRID -- Access Future Data View THE/MY GRID -- Change Data in History Data View
Schedule a Meeting for Several People	THE GRID -- Access MISCELLANEOUS -- Meeting Maker	
Schedule Appointments	THE/MY GRID -- Access THE/MY GRID -- Schedule Appointments	THE/MY GRID -- Access Future Data View THE/MY GRID -- Change Data in History Data View
Schedule Codes	SARS·UTIL -- Access SARS·UTIL -- Table Maintenance	
Schedule Recurring Meetings/ Appointments (for each advisor)	THE GRID -- Access THE GRID -- Schedule Appointments THE GRID -- Change Schedule Codes	THE GRID -- Access Future Data View
Schedule Recurring Meetings/ Appointments (only advisor's own)	MY GRID -- Access MY GRID -- Change Schedule Codes (Appointment allowable) MY GRID -- Change Schedule Codes (Non-Appointment allowable) MY GRID -- Schedule Appointments	MY GRID -- Access Future Data View

Function	Required Access Codes	Optional Access Codes
Search for Appointment	THE/MY GRID -- Schedule Appointments	THE/MY GRID -- Access Future Data View
Send Student to Drop-in Screen	THE/MY GRID -- Access MISCELLANEOUS -- Add Dropins	
Short Name Maintenance	SARS·UTIL -- Access SARS·UTIL -- Short Name Maintenance	
Short Name Maintenance - Change the Display Order of Short Names on THE GRID	SARS·UTIL -- Access SARS·UTIL -- Short Name Maintenance SARS·UTIL -- Table Maintenance	
Student Drop-in Screen: Select Student from List	THE/MY GRID -- Access	
Student Drop-in Screen: Add Drop-inss	THE/MY GRID -- Access MISCELLANEOUS -- Add Dropins	
Student History Screen	THE/MY GRID -- Access MISCELLANEOUS -- View Student History	
Student Maintenance	SARS·UTIL -- Access SARS·UTIL -- Student Maintenance	
The Roster	THE/MY GRID -- Access	THE/MY GRID -- Schedule Appointments THE/MYGRID -- Access Future Data View
Use MY GRID	MY GRID -- Access	MY GRID -- Access Future Data View MY GRID -- Access Notes MY GRID -- Change Data in History Data View MY GRID -- Change Reason Codes MY GRID -- Change Schedule Codes (Appointment allowable) MY GRID -- Change Schedule Codes (Non-Appointment allowable) MY GRID -- Record Attendance MY GRID -- Schedule Appointments MISCELLANEOUS -- View Student History
Use THE GRID	THE GRID -- Access	THE GRID-- Access Future Data View THE GRID-- Change Data in History Data View THE GRID-- Change Schedule Codes THE GRID-- Schedule Appointments MISCELLANEOUS -- View Student History
User Name Maintenance	SARS·UTIL -- Access SARS·UTIL -- User Name Maintenance	

4.9 User Name Maintenance

The User Name Maintenance screen is used to add, delete, or change information about a user of the SARS GRID application.

Here is an example of the screen layout.



The following options appear on this screen:

- USER NAME: Use to establish a user of the system. A user is any person who is authorized to use all or part of the system.
- PASSWORD: Use to establish the password that a user will enter in order to gain access to SARS·GRID.
- FULL NAME: Use to enter the full name of the user.
- PRIMARY LOCATION: Use to assign the user name to a home Location or department (for example, Advising, Counseling, Career Center or Disabled Student Services) that will be the user's primary (default) Location.

- ACCESS CODE: Use to assign the user name to a category of users (for example, System Administrator, Advisor, Counselor, Tutor, or Scheduler).

- SHORT NAME: Use to associate a user (e.g. advisor) with his/her corresponding Short Name. Every advisor must be linked with his/her Short Name in order to be able to view his/her own schedule on MY GRID.

- USE EXPIRATION DATE: Use to establish a cut off date for a user's Log On. After this date, the user's Log On will no longer be valid for any Location. This option may be useful for temporary staff or adjunct faculty when it is known that the individual will be using the system for a limited time. If left unchecked, the default for the user will be displayed as NEVER in the EXPIRATION DATE column on the screen and the date field will be disabled. It serves as a safety method in the event that the system administrator forgets to delete that user when that individual is no longer allowed to work with SARS·GRID.

  DATE FIELD: Use if the USE EXPIRATION DATE option has been checked to select the expiration date for this user's Log On. The user will no longer be able to log on to the system in any location after this date.

- FILTER LIST: Use as a toggle to display (1) only the users assigned to locations to which the user has access (the default mode), or (2) all users in the database. When pressed in, the filter is on; when released, the filter is off and all users are listed. The purpose of toggling to "All Users" is to allow administrators to assign users from other Locations to their own Location with any appropriate access rights.

- ACCESS CODE MAINTENANCE: Use to gain access to the ACCESS CODE MAINTENANCE screen in order to add, delete, or change access rights for a category of users (for example, System Administrator, Advisor, or Scheduler).

- LOCATIONS: Use to gain access to the USER LOCATION SELECTION screen for the purpose of assigning the selected user to all Locations to which the user belongs. [This option may only be available to those users who are assigned access rights to more than one Location.]

- ADD: Use to make fields available to enter new data.

- SAVE: Use to save new entries or changes made on the screen.

- DELETE: Use to remove data.

- CANCEL: Use to terminate the action without saving.

- CLOSE: Use to exit the screen.

4.9.1 Add a User Name

If advisors will be using the system, their names must be entered on both the USER NAME MAINTENANCE and SHORT NAME MAINTENANCE screens. The advisor's User Name and Short Name do not need to be the same. User Names for individuals working in more than one Location must be entered **only once** (preferably by the system administrator for the user's primary Location). System administrators at any given Location may need to contact the college's primary System Administrator for assistance in assigning users to their Locations, if they do not have access to the Location where the user name was first assigned.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on USER NAME MAINTENANCE.

4. Click on ADD.

5. Click on USER NAME and then type in the name. The field will accept up to 20 alpha or numeric characters. (Entries typed in lower case will be converted to upper case automatically).

6. Click on PASSWORD and then type in the password for the user. The field will accept up to 20 characters, numbers, or special characters in any combination. The Password is not case sensitive. To ensure greater security, passwords should consist of four or more characters.

7. Click on FULL NAME; then type the full name of the user. It is recommended that the format of the name be First Name Last Name.

   Warning
   The SARS·Chat application will not function if the FULL NAME contains a comma.

8. Click on PRIMARY LOCATION ▼; then select the home Location to which the user name is assigned.

9. Click on ACCESS CODE ▼; then select the Access Code category to which the user is to be assigned in that Location.

10. Click on SHORT NAME ▼; then select the short name for the user from the drop down list.

    Notes
    For each advisor, assign the corresponding Short Name that was established for that individual. A unique Short Name is required for advisors to view their own schedules on MY GRID.

    For schedulers and System Administrators, assign the Short Name of NONE.

    For each manager, assign the corresponding Short Name that was established for that manager. Otherwise, assign the Short Name of ALL.

A user who has a unique Short Name and access to MY GRID will be able to view and write notes about students, as well as to receive appointment arrival notifications and chat messages. A user who has a Short Name of ALL and access to MY GRID – ACCESS NOTES will be able to view notes about students and will be able to write notes under any selected Short Name. However, that user will not be able to receive appointment arrival notifications or instant messages.

11. [Optional safety feature] If the User is a temporary worker or for some other reason should be prevented from logging on to the system after a certain date, click on USE EXPIRATION DATE. Then click on the adjacent date field and select the desired date. After that date, the user will not be able to log on to any location. If the individual attempts to log on, the following screen will be displayed:

Notes
If the user needs to be provided access to the system again, simply uncheck the box or change the expiration date.

To discontinue a user's access to one or more, but not all locations, use the LOCATION SELECTION screen instead of the USE EXPIRATION DATE feature. (See Section 4.9.1 in this Part.)

12. Click on SAVE.

13. Repeat steps 4 – 12 until all user names have been added.

14. Click on CLOSE.

4.9.2 Assign a User Name to Additional Locations

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

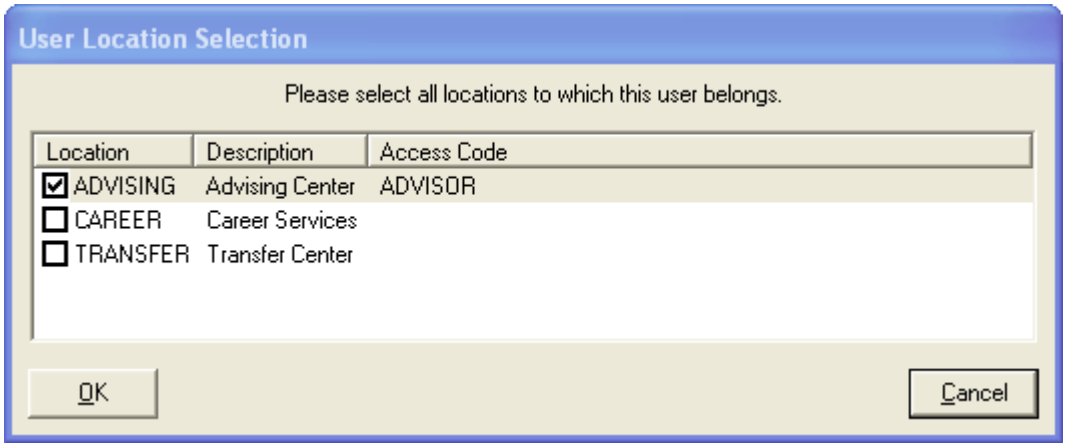
3. Click on USER NAME MAINTENANCE.

4. Click on the selected user name. The existing information for those fields will appear in the boxes below.

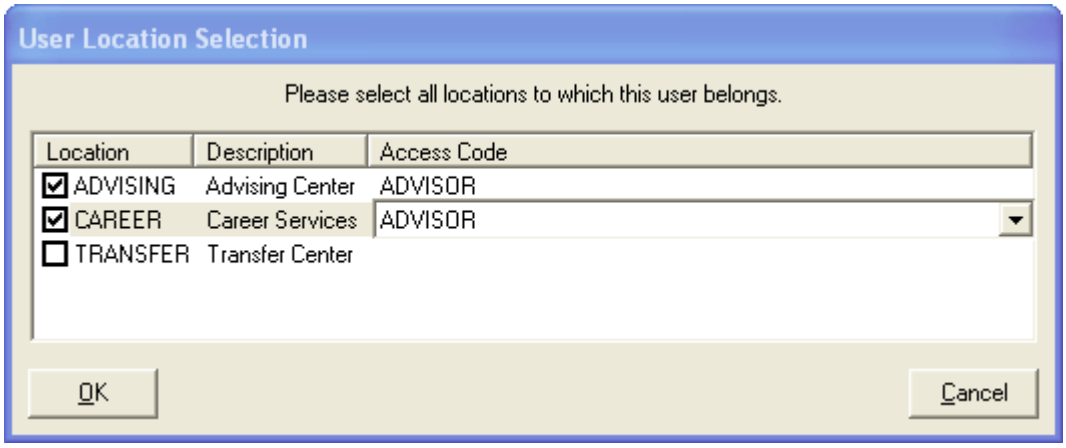
Note
If the desired user name is not displayed, it may be because the Filter List toggle option is activated. Click on FILTER LIST to display all possible names. In the "All Users" mode, any User Name that is grayed out is not assigned to the current Location. The administrator may select that name, however, and then click on Locations to make the assignment.

5. Click on LOCATIONS. A USER LOCATION SELECTION screen will be displayed.

Here is an example:



6. Click on the checkbox adjacent to the other Location to which this User Name is assigned. The screen will change to provide a selection box in the Access Code field. Here is an example:



Note
The Access Code always defaults to the first code on the list for that Location.

7. To select a different Access Code for this User Name for the selected Location, click on the Access Code ▼ that has now been made available and select the correct Access Code.

8. Repeat steps 6 – 7 to assign the User Name to other Locations, as needed.

9. Click on OK.

10. Click on CLOSE.

Note
To assign a special Access Code to a user who is otherwise unassigned to your Location, see Special Situations in this Part, Section 4.8.4.

4.9.3 Change Information about a User Name

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on USER NAME MAINTENANCE.
4. Click on the selected user name. The existing information for those fields will appear in the boxes below.

Note
If the desired user name is not displayed, it may be because the Filter List toggle option is activated. Click on FILTER LIST to display all possible names. In the "All Users" mode, any User Name that is grayed out is not assigned to the current Location. The administrator may select that name, however, and then click on Locations to make the assignment.

5. Enter the applicable changes.
6. Click on SAVE.
7. Click on CLOSE.

4.9.4 Delete a User Name

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on USER NAME MAINTENANCE.
4. Click on the selected user name. The existing information for those fields will appear in the boxes below.

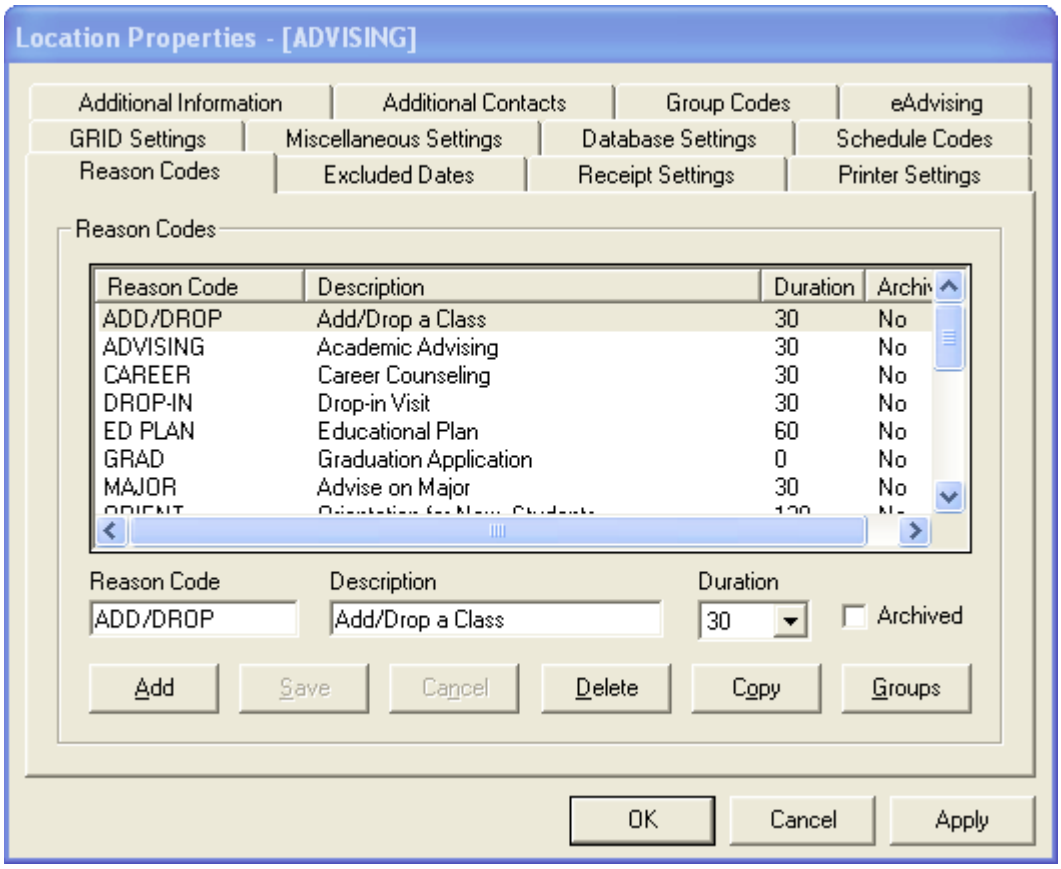
Note
If the desired user name is not displayed, it may be because the Filter List toggle option is activated. Click on FILTER LIST to display all possible names.

5. Click on DELETE. A confirmation message will appear.
6. Click on YES to complete the deletion.
7. Click on CLOSE.

4.10 Reason Codes

The Reason Codes screen is used to add, delete, or change information on a Reason Code. Standardized Reason Codes facilitate appointment and reporting activities.

Here is an example of the screen layout.



The following options appear on this screen:

- REASON CODE: Use to represent the purpose for making or canceling the appointment.
- DESCRIPTION: Use to enter a more complete description of the Reason Code.
- DURATION: Use to establish the amount of time to allocate for the selected Reason Code so that students booking appointments using e·SARS will be assigned the proper length appointment for the reason selected.
- ARCHIVED: Use to archive an unneeded Reason Code to reduce clutter.
- ADD: Use to make fields available to enter new data.
- SAVE: Use to save new entries or changes.

- CANCEL: [REASON CODES screen] Use to terminate the action without saving.
- DELETE: Use to remove data.
- COPY: Use to transfer one or more Reason Codes from one Location to another Location for its use.
- GROUPS: Use to assign Reason Codes to Reason Code Groups.
- OK: Use to save new entries or changes and exit the screen.
- CANCEL: [LOCATION PROPERTIES screen] Use to terminate the action without saving.
- APPLY: Use to establish the selected settings.

4.10.1 Add a Reason Code

1. First check to see whether Reason Codes have been created for another Location. If so, they may be copied to this Location, eliminating the need for duplicate efforts. (See Copy a Reason Code from another Location at Section 4.10.4 in this Section.)
2. Click on UTIL on the SARS·MENU.
3. Click on SYSTEM ADMINISTRATION.
4. Click on LOCATION MAINTENANCE.
5. Click on the desired Location.
6. Click on PROPERTIES.
7. Click on the REASON CODES tab.
8. Click on ADD.
9. Click on REASON CODE; then type an abbreviation to represent the purpose for making or canceling the appointment. The field will accept up to 20 alpha/numeric characters (for example, ORIENT).

   Tip
   Add “DROPIN” to serve as the default for a drop-in visit via the STUDENT DROP-IN SCREEN (see “Add a Student to the Drop-in List” in Part IV, Section 21.1). This will enable a report to be generated that will provide detailed information on all drop-in visits during a selected date range.

10. Click on DESCRIPTION, then type a more complete description of the Reason Code. The field will accept up to 50 characters.
11. [Optional – to be used in conjunction with e·SARS] Click on DURATION ▼ and then select the amount of time to allocate for an appointment when the Reason Code is selected by a student in e·SARS. For example, if an ED PLAN appointment has a duration of 60

minutes, select 60 in this field. If no duration is established, e·SARS will use the Time Increment established in the GRID SETTINGS tab for this Location.

12. [Optional] You do not need to use the GROUP feature at this time. If you wish to use Groups, they must first be established. (See the information on Reason Code Groups in this Part, Section 5.3.)

13. Click on SAVE.

14. Click on OK.

4.10.2 Change Information about a Reason Code

If a Reason Code is changed, the new Reason Code will replace the original Reason Code in the Student Appointment History for the given Location.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the REASON CODES tab.

7. Click on the desired Reason Code.

8. Type in the applicable change in the REASON CODE, DESCRIPTION, and/or DURATION field.

9. Click on SAVE.

10. Click on OK.

4.10.3 Delete a Reason Code

Only Reason Codes that have not yet been used may be deleted.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the REASON CODES tab.

7. Click on the desired Reason Code. The existing code and description will be displayed in the boxes below.

8. Click on DELETE. A confirmation message will be displayed.

9. Click on YES to confirm the deletion.

10. Click on OK.

4.10.4 Copy a Reason Code from another Location

Any Reason Code that has been created for one Location may be selected for use by other Locations via the COPY function.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

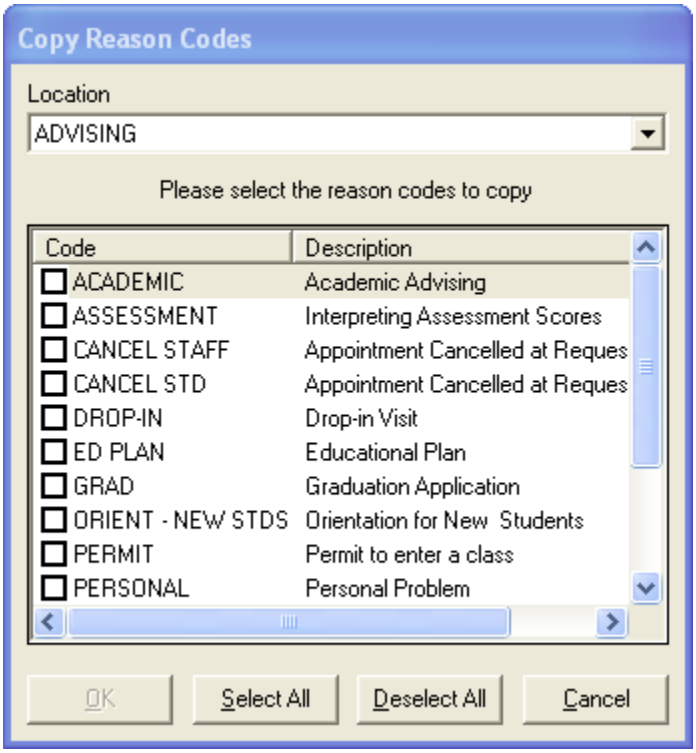
3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the Reason Codes tab.

7. Click on COPY. A COPY REASON CODES sub-screen will be displayed. Here is an example:



The options are:

- LOCATION: Use to select the location from which existing Reason Codes are to be copied.

- CODE/DESCRIPTION: Use to check the boxes for the Reason Codes to be copied.
- OK: Use to approve the selections.
- SELECT ALL: Use to check all of the Reason Codes for copying to your Location.
- DESELECT ALL: Use to deselect all the Reason Codes.
- CANCEL: Use to exit the screen without saving the selections.

8. In LOCATION ▼, select the Location from which existing Reason Codes are to be copied.
9. Click on the checkbox adjacent to each Reason Code to be copied to the current Location. Any or all of the codes may be selected. The *OK* button will be enabled after the first Reason Code is selected.

   -or-

   Click on SELECT ALL to check all boxes.
10. Click on OK. The selected Reason Codes will appear on the REASON CODES screen for that Location.
11. Click on OK.

4.10.5 Archive a Reason Code

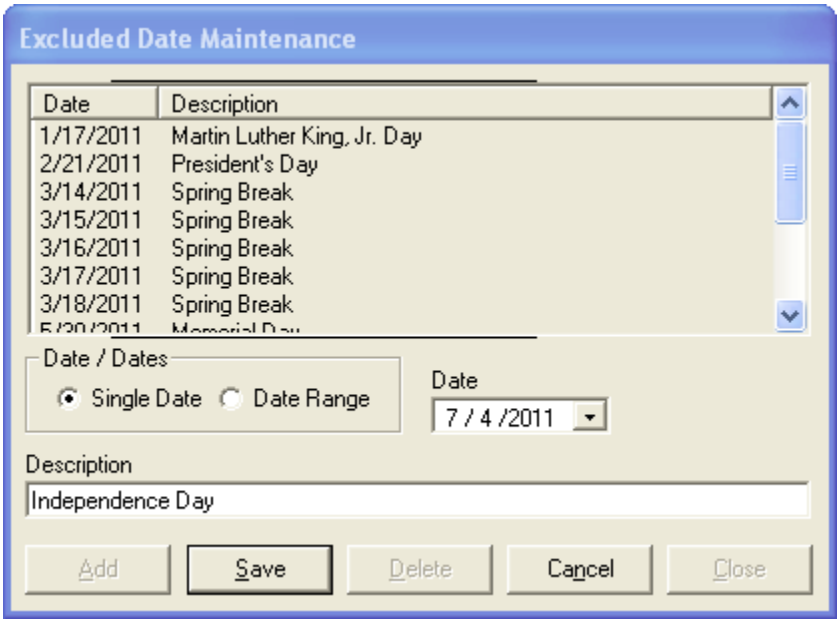
If a Reason Code has ever been used, even if it is not currently in use, it cannot be deleted. However, these Reason Codes may be archived. Archiving reduces clutter on the screen by hiding the Reason Code on the following screens: Student Appointment Screen and any report that displays a list of Reason Codes. The Reason Code will still be displayed in Student History.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the Reason Codes tab.
7. Click on the Reason Code to be archived. The ARCHIVED checkbox will be activated.
8. Click on the ARCHIVED checkbox.
9. Click on SAVE. The Reason Code will be archived until the checkbox is unchecked.
10. Repeat steps 7 – 9 to archive another Reason Code.

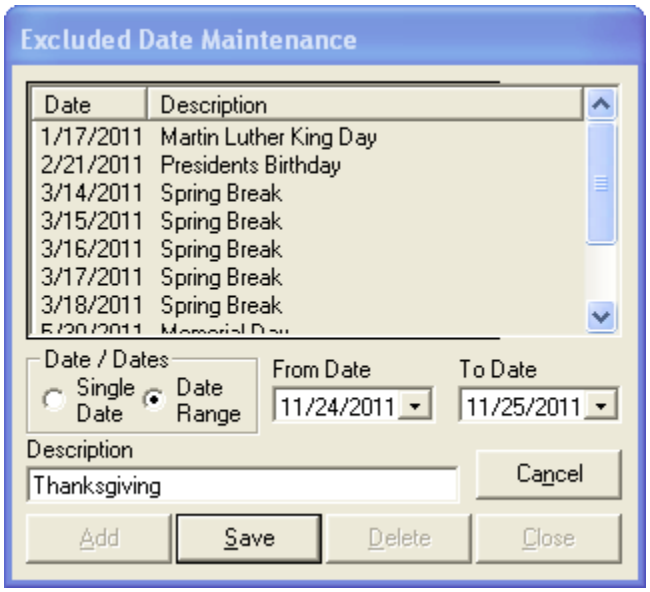
4.11 Excluded Date Maintenance

The Excluded Date Maintenance screen is used to add, change, or delete the days of the year for which appointments may not be scheduled (for example, Thanksgiving Holiday or spring break).

Here is an example of the screen layout when the SINGLE DATE option has been selected.



Here is an example of the screen layout when the DATE RANGE option has been selected.



The following options appear on this screen:

- DATE: Use to enter each calendar date for which appointments cannot be scheduled. The date defaults to the current date.

- DATE/DATES:

  SINGLE DATE: Use to specify that the selected Excluded Date is for a single day.

  DATE: [Enabled if Single Date is selected] Use to enter or select the date of the Excluded Date.

  DATE RANGE: Use to specify the date range for the Excluded Date description.

  FROM DATE: [Enabled if Date Range is selected] Use to enter or select the first date of the date range.

  TO DATE: [Enabled if Date Range is selected] Use to enter or select the last date of the date range.

- DESCRIPTION: Use to enter the description of each calendar date or date range for which appointments cannot be scheduled.
- ADD: Use to make fields available to enter new data.
- SAVE: Use to save new entries or changes made on the screen.
- DELETE: Use to remove a date and description.
- CANCEL: Use to terminate the action without saving.
- CLOSE: Use to exit the screen.

4.11.1 Add an Excluded Date

To display Excluded Dates on THE GRID, ensure that the GENERATE EXCLUDED DATES box on GRID SETTINGS has been checked. **Before** adding Master Schedules to THE GRID each term, enter or select the excluded dates for that term. The action of adding the Master Schedules causes the excluded dates to be displayed.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on any Location.
5. Click on PROPERTIES.
6. Click on EXCLUDED DATES. If all necessary excluded dates have already been entered by another Location, skip to Section 4.11.2, “Select or De-select Excluded Dates for Each Location.”
7. Click on EXCLUDED DATE MAINTENANCE.

8. To add an excluded date, click on ADD.

9. Click on SINGLE DATE to enable the DATE field and then type in (or select using the Date Picker) the calendar date that will be blocked from scheduling. (For more information, see "Date Picker" in Appendix B.)

   -or-

   Click on DATE RANGE to enable the FROM DATE and TO DATE fields. Then type in the first date on which that excluded date will begin, and the last day encompassed by the date range. (You can also use the Date Picker.)

10. Click on DESCRIPTION and then type in the description of the calendar date for which appointments cannot be scheduled. The field will accept up to 50 characters (for example, Thanksgiving Day).

11. Click on SAVE.

12. Repeat steps 8 – 11 to enter other excluded dates.

13. Click on CLOSE.

14. Click on the checkbox adjacent to each date on the Excluded Dates screen that is to be used by the selected Location (see "Select or De-select Excluded Dates for Each Location" in this Part, Section 4.11.2).

15. Click on OK.

Tip
If you added a Master Schedule to THE GRID before entering or selecting excluded dates, correct the problem by first adding or selecting those dates and then re-add the master schedule for the same time period. The new data will only override the existing data if no appointments have been scheduled for that time period. All schedule codes will be overridden, erasing any incidental changes (for example, meetings) that have been previously recorded.

4.11.2 Select or De-Select Excluded Dates for Each Location

Excluded dates, once created by one Location, may be selected or deselected by each discrete Location using SARS·GRID.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

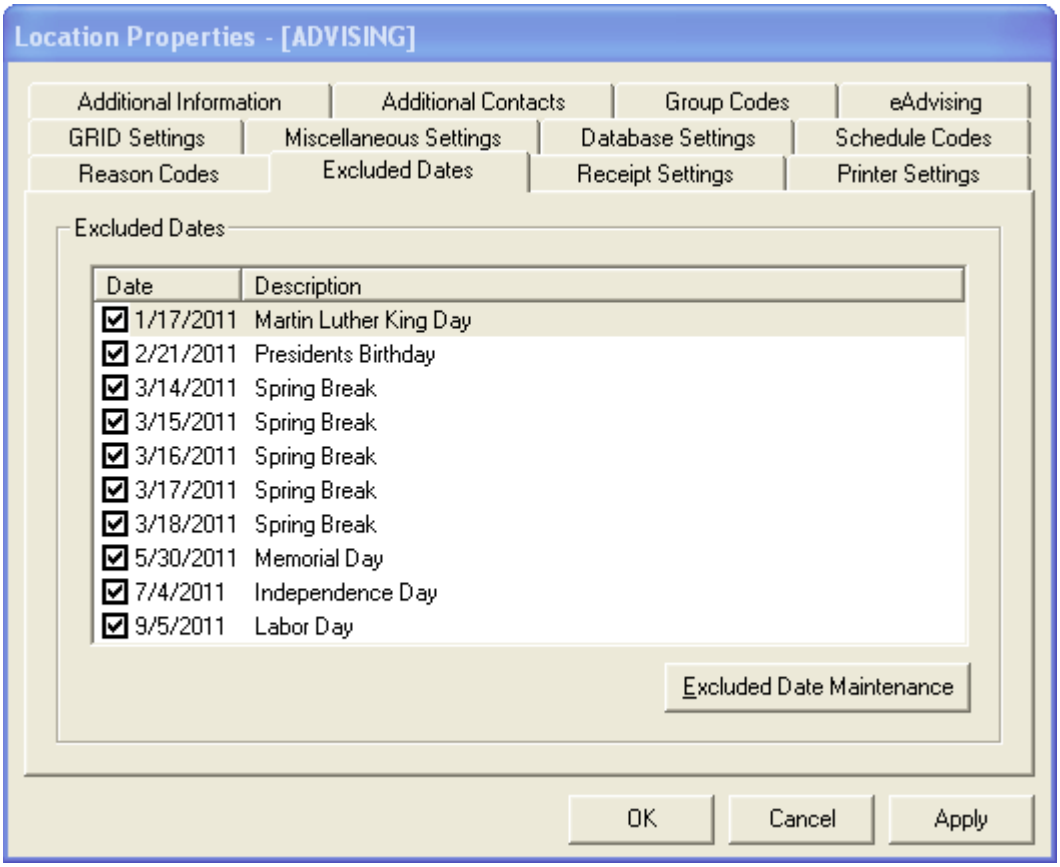
3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on EXCLUDED DATES. The Excluded Dates screen will be displayed.

Here is an example:



7. Click on the checkbox adjacent to each date that is to be used by the selected Location.

   -or-

   Click to remove the check mark adjacent to each date that is not to be used by the selected Location.

8. Click on OK.

4.11.3 Change the Description of an Excluded Date

Only the description for an Excluded Date may be changed, not the Excluded Date itself. This section discusses how to change the description. To change an Excluded Date, the entire entry must be deleted and then re-entered. See “Delete an Excluded Date” at Section 4.11.4 and ”Add an Excluded Date” at Section 4.11.1 in this Part.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on any Location.

5. Click on PROPERTIES.

6. Click on EXCLUDED DATES.

7. Click on EXCLUDED DATE MAINTENANCE.

8. Click on the selected date. The existing information for that date will appear in the boxes below.

9. Type the applicable change to DESCRIPTION.

10. Click on SAVE.

11. Click on CLOSE.

4.11.4 Delete an Excluded Date

Periodically, Excluded Dates that are associated with a time period that is in the past should be deleted. An excluded date that has occurred in the past may be deleted following these steps and it will be effective for all Locations using that Excluded Date. However, to delete an Excluded Date that is in the future, that date must first be de-selected in each Location that is using it. (See "Select or De-Select Excluded Dates for each Location" in Section 4.11.2 in this Part.) Then follow the steps below.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on EXCLUDED DATES.

7. Click on EXCLUDED DATE MAINTENANCE.

8. Click on the selected date. The existing information for that date will appear in the boxes below.

Note
To delete a consecutive range of dates, use the Shift key and then click on the first date in the range and then the last date to be included in the date range. To delete multiple non-consecutive dates, hold down the CTRL key while clicking on each date to be deleted.

9. Click on DELETE. A confirmation message will be displayed.

10. Click on YES to confirm the deletion.

11. If the selected date is in the future and is being used by another Location, you will first need to go to the other Location(s) and de-select the date.

12. Click on CLOSE.

SECTION 5 — ENTER OPTIONAL INFORMATION

5.0 Overview

This Section describes optional set-up tasks. The system administrator may want to complete these after finishing with the actions in Section 4 or on an as-needed basis.

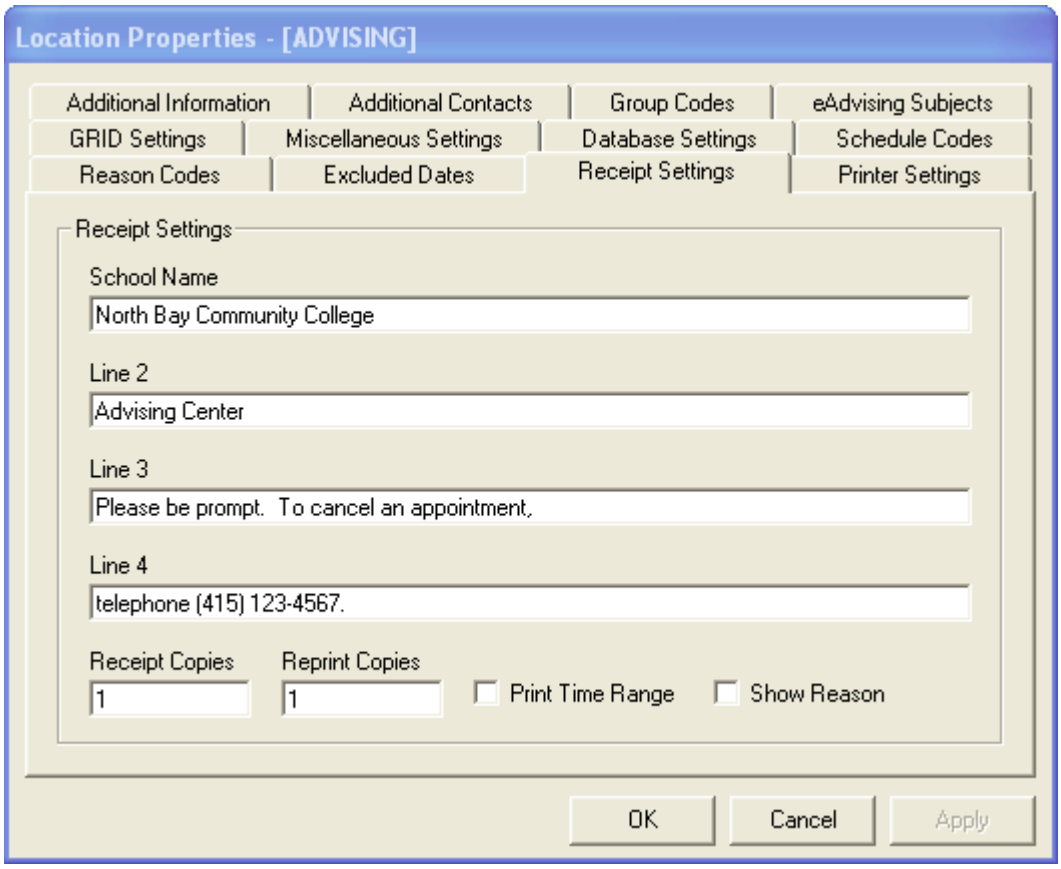
This list that follows is a table of contents for Section 5.

5.1 Receipt Settings

Receipts are appointment slips for future appointments that are printed and given to students. Receipts can be printed on plain sheets of paper, on labels, or on continuous feed thermal receipt paper. Labels are handy and can be affixed to an advisor's business card or to other information useful to the student (e.g., a map of the campus or list of telephone numbers). Some colleges affix labels to bookmarks where they will serve as ready reminders. To view samples of plain paper, small label and large label receipts, see "Configure Printer Settings" at Section 5.2.1 in this Part.

The Receipt Settings screen is used to customize the appointment receipt printout that is given to a student.

Here is an example of the screen layout.



The options are:

- SCHOOL NAME: Use to indicate the name of the school that will be printed on the first line of the appointment receipt.
- LINE 2: Use to enter information to be conveyed to the student on the appointment receipt slip, such as name and telephone number of department, warnings about late arrival, and cancellation information.

- LINE 3: Use to enter information to be conveyed to the student on the appointment receipt slip, such as name and telephone number of department, warnings about late arrival, and cancellation information.
- LINE 4: Use to enter information to be conveyed to the student on the appointment receipt slip, such as name and telephone number of department, warnings about late arrival, and cancellation information.
- RECEIPT COPIES: Use to indicate the number of original appointment receipts that will be printed automatically if the appointment receipt option is selected.
- REPRINT COPIES: Use to indicate the number of original appointment receipts that will be printed at any time after an appointment is committed.
- PRINT TIME RANGE: Use to display both the start and the end times of an appointment. This is the default selection. Deselecting this option must be performed on a computer-by-computer, and location-by-location basis.
- SHOW REASON: Use to display the reason(s) for the appointment on the receipt slip.
- OK: Use to save entries or changes and close the LOCATION PROPERTIES screen.
- CANCEL: Use to cancel the actions without saving.
- APPLY: Use to save entries or changes without closing the LOCATION PROPERTIES screen.

5.1.1 Establish Receipt Settings

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the RECEIPT SETTINGS tab.
7. In the SCHOOL NAME field, type in the name of the school or any other information which is to appear on the first line of the appointment receipt. The field will accept up to 30 characters.
8. Click on the field adjacent to LINE 2; then type in the information that is to appear on the second line of the receipt. The field will accept up to 50 characters.

9. Click on the field adjacent to LINE 3; then type in the information that is to appear on the third line of the receipt. The field will accept up to 50 characters.

10. Click on the field adjacent to LINE 4; then type in the information that is to appear on the fourth line of the receipt. The field will accept up to 50 characters.

11. Click on the field adjacent to RECEIPT COPIES; then type in the number. This field will accept any number between 1 and 9.

12. Click on the field adjacent to REPRINT COPIES, then type in the number. This field will accept any number between 1 and 9.

13. The PRINT TIME RANGE option is checked as the default. If desired, uncheck this option to display only the start time of the appointment. This must be done on a computer-by-computer, and location-by-location, basis.

14. [Optional] Click on SHOW REASON to include the appointment reason on the appointment receipt. The space will accommodate approximately 20 characters. When more than one reason exists, the reasons will print in alphabetical order until the space is filled.

15. Click on APPLY. If desired, click on the PRINTER SETTINGS tab (see "Configure Printer Settings" at Section 5.2.1 in this Part).

    -or-

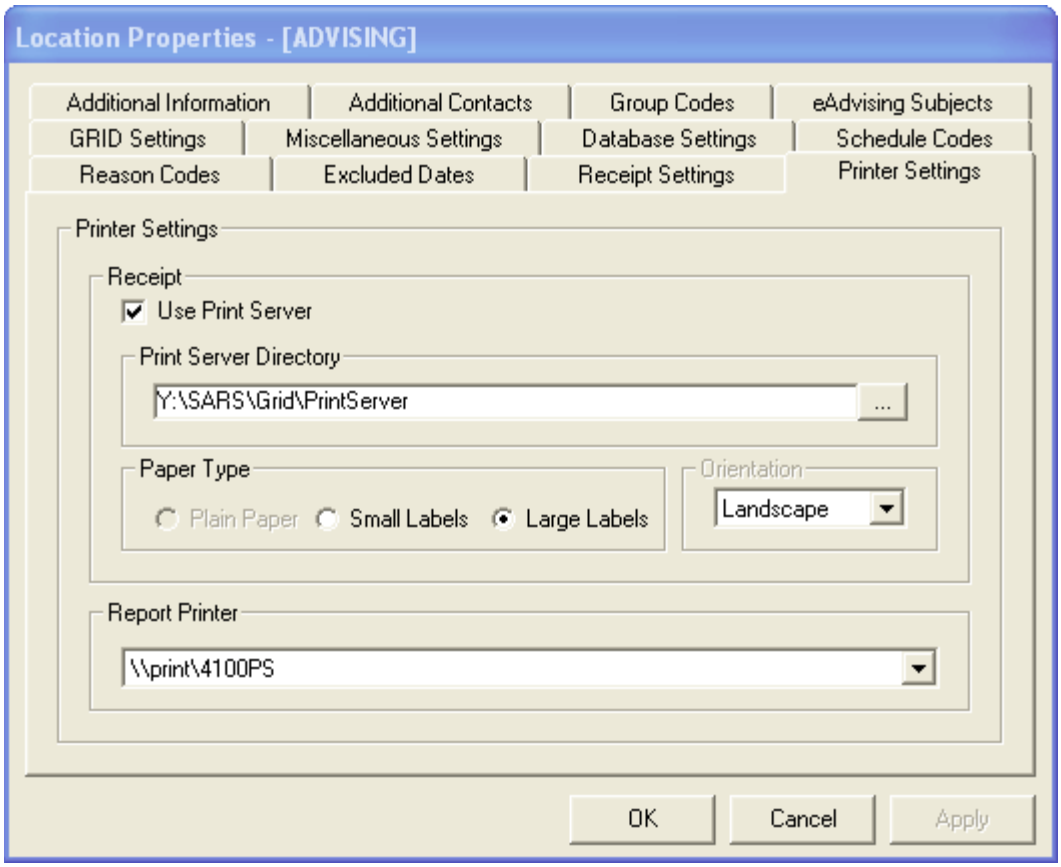
16. Click on OK to return to LOCATION MAINTENANCE.

5.2 Printer Settings

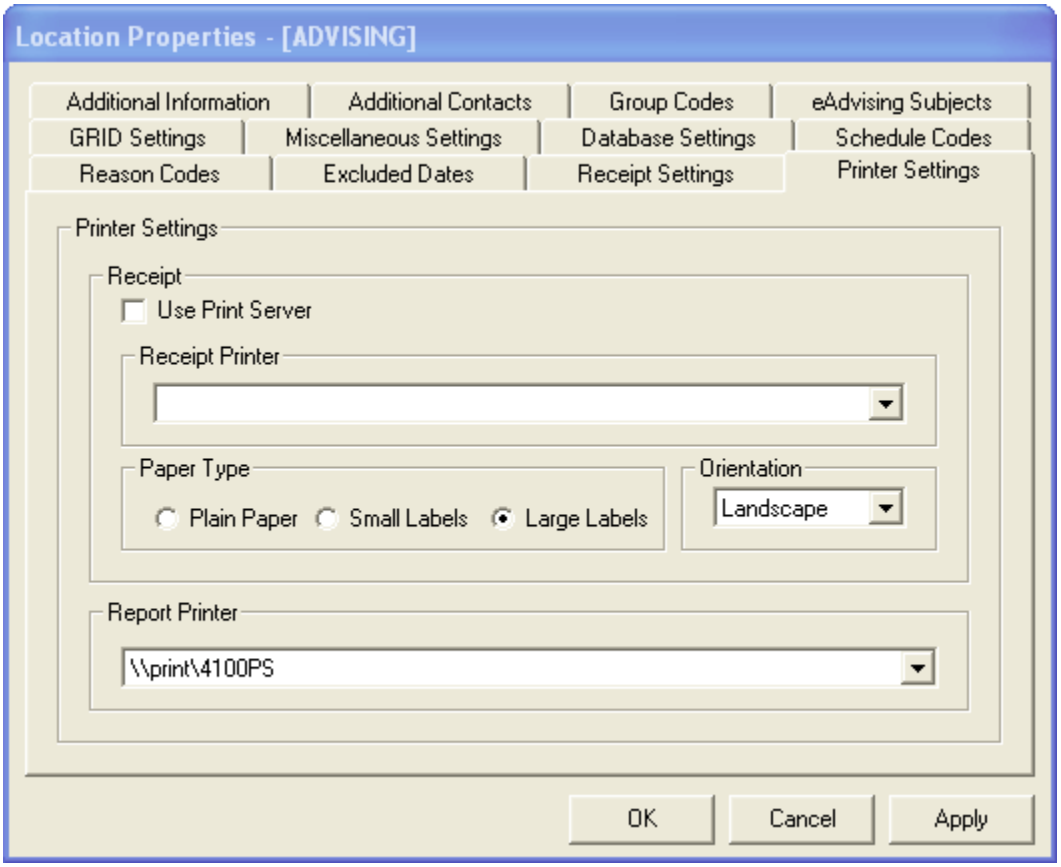
Appointment receipts can be printed on plain sheets of paper, on labels, or on continuous feed thermal receipt paper. If labels are to be used, note that SARS·GRID is compatible with Dymo LabelWriter 300 and 330 or higher. Compatibility with other label printers has not been tested and cannot be guaranteed.

The Printer Settings screen is used to establish printer specifications for printing appointment receipts and reports.

Here is an example of the screen layout when using a Print Server.



Here is an example of the screen layout when not using a Print Server.



The options are:

- USE PRINT SERVER: Use to direct printing of appointment receipt labels to the PC to which the label printer is attached.

  PRINT SERVER DIRECTORY: Use to select the directory for use by the Print Server.

- RECEIPT PRINTER: Use (if USE PRINT SERVER is not checked) to select the printer that will be used for printing appointment receipts.

- PAPER TYPE: Use to specify the type of paper on which the appointment receipt will be printed.

  PLAIN PAPER: Use to establish that the appointment receipt will be printed on whatever paper is currently loaded in the printer.

  SMALL LABELS: Use to establish that the appointment receipt will be printed on a 1-1/8" X 3-1/2" label [Dymo Address Label # 30252 – adhesive]. The small label will print the name of the student and advisor; the appointment date, day and time; and the advisor's room number if this option is being used.

LARGE LABELS:	Use to establish that the appointment receipt will be printed on a 2-5/16" X 4" label [Dymo Shipping Label # 30256 – adhesive], a 2-1/8" X 4" label [Dymo Shipping Label # 30323 – adhesive], or a 2-7/16" wide continuous feed thermal tape [Dymo Receipt paper # 30270]. The large label will print the entries from the Receipt Settings screen, as well as the name of the student and advisor; the appointment date, day and time; and the advisor's room number if this option is being used.
ORIENTATION:	Use to specify whether the appointment receipt will be printed in Portrait or Landscape format. If no selection is made, orientation defaults to Landscape when using labels and to Portrait when using plain paper.
• REPORT PRINTER:	Use to select the printer that will be used to print reports.
• OK:	Use to save entries or changes and close the LOCATION PROPERTIES screen.
• CANCEL:	Use to cancel the actions without saving.
• APPLY:	Use to save entries or changes without closing the LOCATION PROPERTIES screen.

5.2.1 Configure Printer Settings

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the PRINTER SETTINGS tab.
7. If a Print Server will be used to print appointment receipts, click on USE PRINT SERVER. The PRINT SERVER DIRECTORY field will be enabled. Select the appropriate print server directory. The location is controlled by the location of the SARS Database. Here are two examples:

   n:\sarsgrid\PrntSrvr\Couns
   n:\sarsgrid\PrntSrvr\EOPS

   Note
   Do not check USE PRINT SERVER on the PC to which the label printer is connected. Check USE PRINT SERVER for all other PCs.

8. If a Print Server will <u>not</u> be used, leave USE PRINT SERVER unchecked.

   a. Select the printer to be used for appointment receipts.

Note
If your label printer is not included in the list of printers, review the instructions that came with the label printer on installing print drivers.

b. Select the paper type (plain paper, small label or large label). If large label is selected, see the **WARNING** message at the end of this section.

c. Select the orientation (portrait or landscape) for the receipt.

Here is an example of the plain paper receipt with the Print Time Range option selected.

North Bay Community College
Advising Center
Please be prompt.
To cancel, telephone (415) 123-4567.

Name:	SMITH, JOHN
Advisor: J	OHN ADAMS
Date:	Tuesday, August 26, 2002
Time:	2:00 PM – 2:30 PM
Room:	Bailey Hall, Room 100
Reason:	CRISIS

Here is an example of the small label with the Print Time Range option selected.

Name:	SMITH, JOHN
Advisor:	JOHN ADAMS
Date:	Tuesday, August 26, 2002
Time:	2:00 PM – 2:30 PM
Room:	Bailey Hall, Room 100
Reason:	CRISIS

Here is an example of the large label with the Print Time Range option selected.

North Bay Community College
Advising Center
Please be prompt.
To cancel, telephone (415) 123-4567.

Name:	SMITH, JOHN
Advisor:	JOHN ADAMS
Date:	Tuesday, August 26, 2002
Time:	2:00 PM – 2:30 PM
Room:	Bailey Hall, Room 100
Reason:	CRISIS

d. In the REPORT PRINTER field, select the printer to be used.

e. Click on OK.

f. After establishing the printer settings in SARS·GRID, you must search every property page for label types in Windows itself to verify that any additional place where label types are specified is consistent with the printer chosen for receipt printing. The location of those settings may vary with each version of Windows or printer driver.

Here is an example of the steps that may be followed to verify the printer driver settings in the Windows XP environment:

- From the Windows Control Panel, click on the PRINTERS option.
- Right-click on the printer being used for labels.
- Click on PROPERTIES.
- Click on the tab labeled DEVICE SETTINGS and select the correct label type.
- Click on APPLY.
- Click on the tab labeled GENERAL.
- Then click on PRINTING PREFERENCES.
- Then click on ADVANCED. Verify or change the label type to correspond with the label type that is to be used in the printer.
- Click on OK to exit out of the sub-screens.

Warning
If the Large Label option has been selected, shipping label 30256 may or may not be compatible with the label printer. If this is the case, select a different label number (such as 30323) that is marked "shipping." Print a test label until you have verified that the label selected is compatible and prints correctly.

5.2.2 Set up the Label Print Server

Note
You need to set up the Label Print Server only if more than one PC is printing labels to the same label printer.

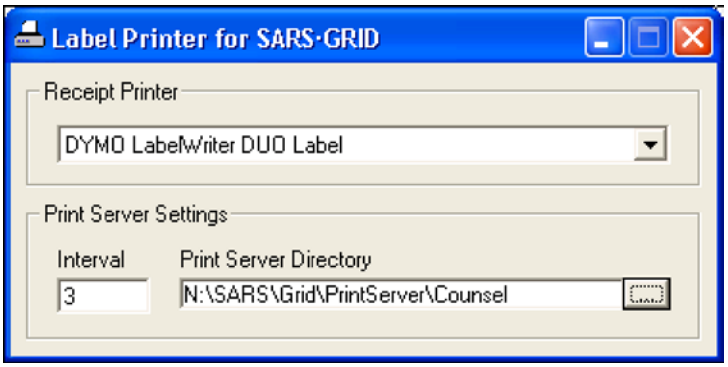
1. On the PC to which the label printer is attached, click on START on the task bar.

2. Click on RUN.

3. In the space adjacent to OPEN, type the same path as that used for all SARS programs followed by PrntSrvr.exe. For example:

   n:\sarsgrid\PrrntSrvr.exe

4. Click on OK to display the LABEL PRINTER FOR SARS·GRID screen. Here is an example.



The options are:

- RECEIPT PRINTER: Use to select the printer that is being used to print receipts labels.
- PRINT SERVER SETTINGS:

  INTERVAL: Use to enter the number of seconds that will elapse before the printer looks for another label to be printed.

  PRINT SERVER DIRECTORY: Use to display the location of the print server directory.

5. Previously using RECEIPT SETTINGS in LOCATION MAINTENANCE, you selected the label printer (Dymo LabelWriter 300 or 330 or higher) to be used for printing labels.

   a. If RECEIPT PRINTER displays any other selection, click ▼ to display a list of printers and then on the selected option.

   b. If the label printer is not included in the list of printers, review the instructions that came with the label printer on installing print drivers.

6. INTERVAL is the number of seconds that the Label Printer Server will wait until it checks for another label to print. To change the INTERVAL, enter the new number. Remember that the larger the number, the greater will be the delay. We recommend 3 seconds.

7. The location of the PRINT SERVER DIRECTORY will be automatically displayed in the space provided. The location is controlled by the location of the SARS Database (for example, n:\sarsgrid\advisl\labeldir).

8. To allow the Label Print Server to remain active, click on MINIMIZE. The label printer will automatically print appointment receipts upon committing an appointment or reprinting a receipt.

   -or-

   To terminate the program, click on CLOSE. A confirmation message will be displayed.

9. Click on YES to confirm the action.

Tip
If you wish to keep the label printer server open and available at all times, configure Windows to start the program automatically when booting up the PC to which the label printer is attached.

5.3 Group Codes

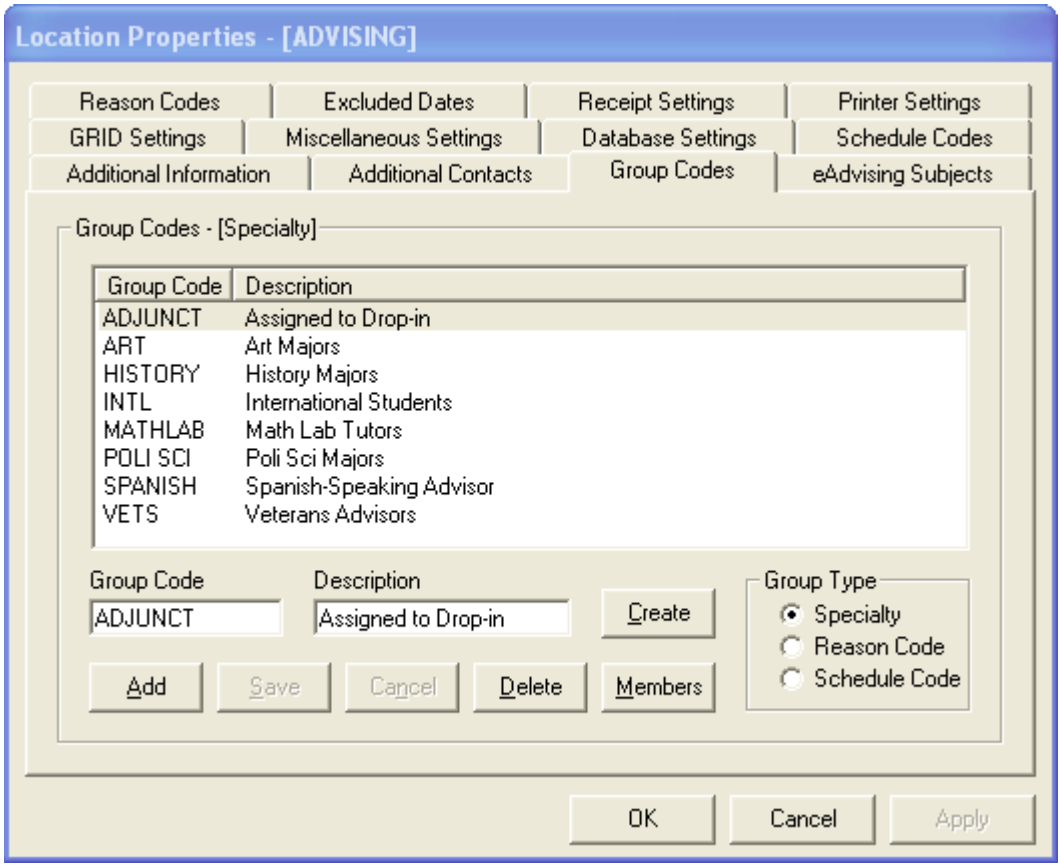
The Group Codes screen is used for the following types of groups:

Specialty Groups:
On THE GRID, use to establish a specialized subject matter or skill to assign to selected advisors. When using the Group option on THE GRID, only the schedules of the individuals who are assigned to the selected Group are displayed. Also, use to create a Specialty Group Code that can be used to limit the choice of advisors that will be displayed on the DROP-IN APPOINTMENT SCREEN (e.g., ADJUNCT). "Groups" are used to facilitate scheduling of students to an individual who can best meet their needs. For example, some individuals may have specialized knowledge pertinent to veterans; others may have knowledge that is pertinent to athletes. In addition, advisors may be grouped according to their language skills to facilitate working with students who have limited English proficiency. This feature may also be used to create classes for use as Specialty Groups when students make tutoring appointments using the web interface (e·SARS).

Reason Code Groups:
Use to create a Reason Code Group Code (e.g., DROP-IN) that can be used to limit the choice of reasons that will be displayed on the DROP-IN APPOINTMENT SCREEN. Also, use to create two Reason Code Groups – one to contain all the Reason Codes to be displayed when making an appointment in e·SARS or SARS·TRAK and the other to contain all the Reason Codes to be displayed when canceling an appointment in the web interface (e·SARS).

Schedule Code Groups:
Use to link related Schedule Codes into a group. Schedule Code Groups will enable you to generate reports showing summary data for advisors' schedules. For example, you can connect all Schedule Codes involving student contact time into a group entitled "ST CONTACT." Schedule Codes involving meetings, preparation time, advisor training, and conferences may also be grouped into a Group Code entitled "ADMIN." A Schedule Code Group must be created for e·SARS applications to enable students to view appointment-available slots when making appointments from home.

Here is an example of the screen layout in the SPECIALTY GROUP CODE mode.



The following options appear on this screen:

- GROUP CODE: Use to enter a brief name for the Group.
- DESCRIPTION: Use to enter a more complete description of the Group.
- CREATE: Use to select one or more classes to be available for use as specialty groups when students use the web interface (*e*·SARS) to make tutoring appointments. This option is only available when GROUP TYPE: SPECIALTY is selected.
- GROUP TYPE: Use to select the category to which these Group Codes will apply.

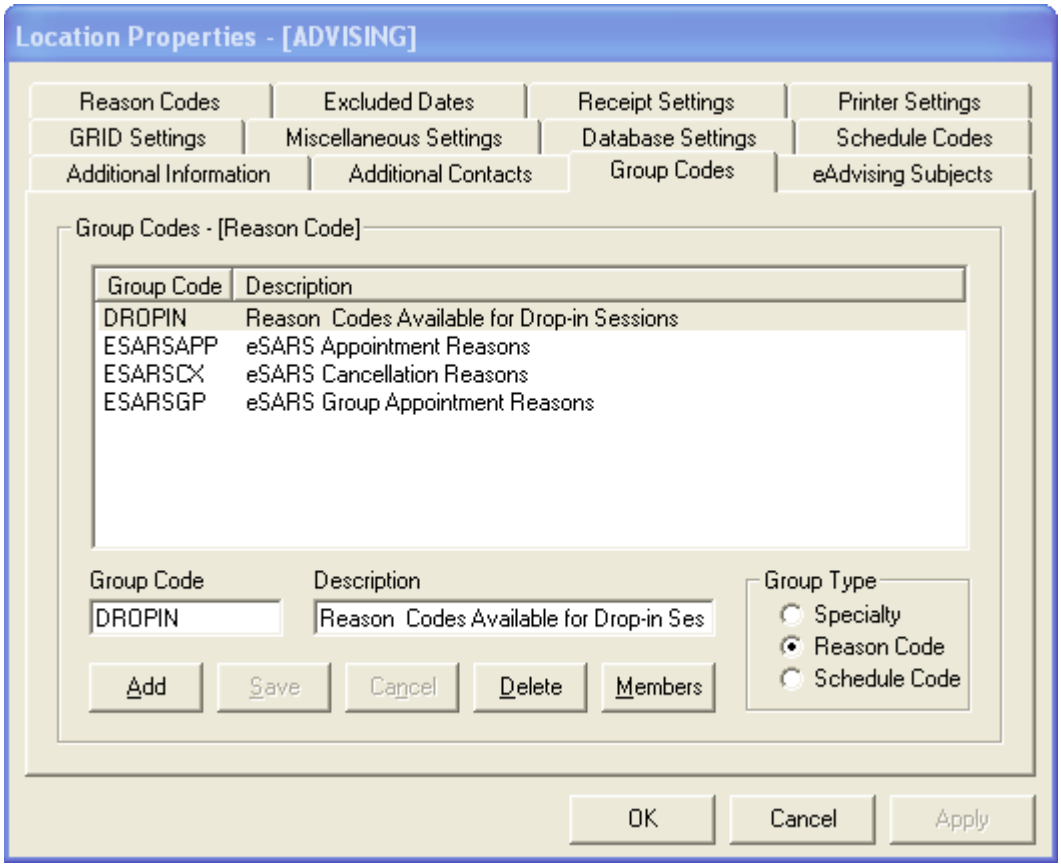
  SPECIALTY: Use to establish that the Group Code is applicable to advisors who have certain areas of expertise or who can advise students on certain subjects related to their classes.

  REASON CODE: Use to establish that the Group Code is applicable to Reason Codes.

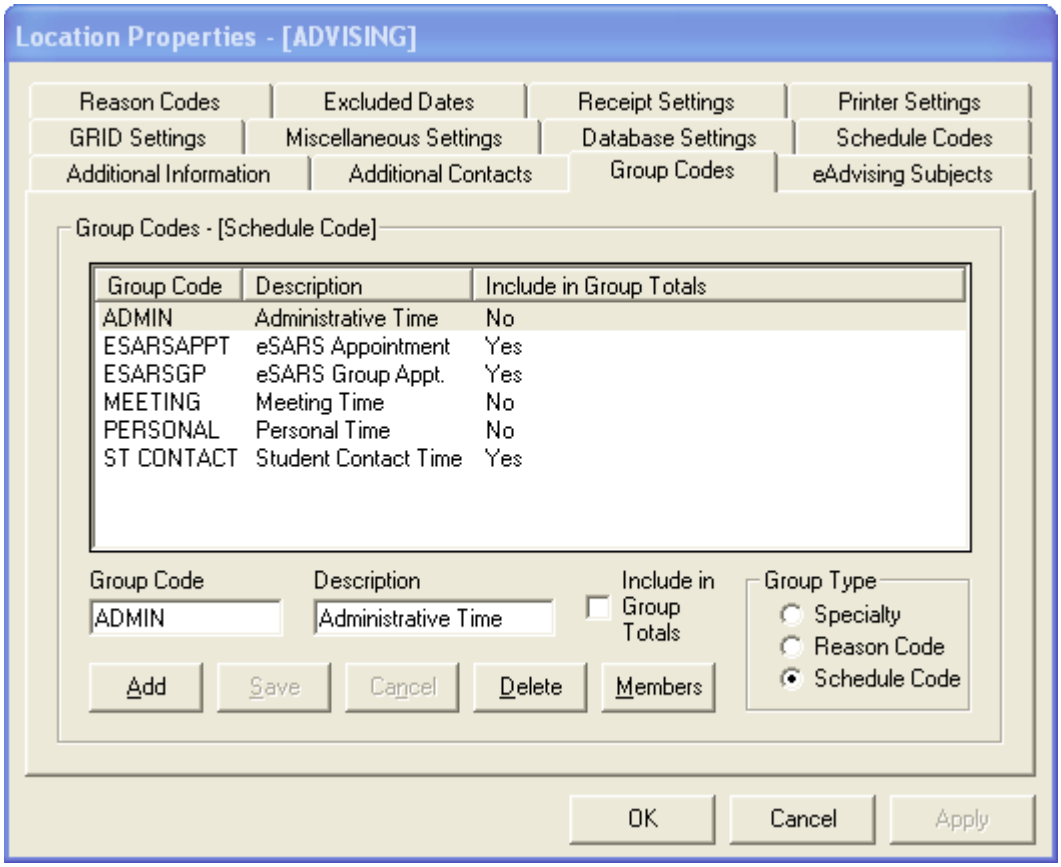
  SCHEDULE CODE: Use to establish that the Group Code is applicable to Schedule Codes.

- ADD: Use to make fields available to enter new data.
- SAVE: Use to save new entries or changes made on the screen.
- CANCEL: [GROUP CODES screen] Use to terminate the action without saving.
- DELETE: Use to remove data.
- MEMBERS: Use to gain access to a GROUP MEMBERS screen, on which selections may be made for inclusion in the selected group.
- OK: Use to save entries or changes and close the LOCATION PROPERTIES screen.
- CANCEL: [LOCATION PROPERTIES screen] Use to cancel the actions without saving.
- APPLY: Use to save entries or changes without closing the LOCATION PROPERTIES screen.

Here is an example of the screen layout in the REASON CODE GROUP TYPE mode.



Here is an example of the screen layout in the SCHEDULE CODE GROUP TYPE mode.



An additional option is available in this mode, as follows:

- INCLUDE IN GROUP TOTALS: Use to specify whether the time on an advisor's Master Schedule for the selected Schedule Code Group Type should be counted in the totals displayed on the Master Schedule Report.

5.3.1 Add a Group Code

Notes
If using the web-based component of SARS·GRID to allow students to work with their own appointments from home, a group code must be created for each of the following: appointment-allowable Schedule Codes to be displayed when students search for an available appointment, and Reason Codes to be displayed when students select a reason for making an appointment.

In order to make classes available for use as Specialty Group Codes, they must be imported from the school's database and then selected for use. See Section 5.3.2, below.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired location.

5. Click on PROPERTIES.

6. Click on the GROUP CODES tab.

7. In GROUP TYPE, click on the category to which the code will be associated: SPECIALTY, SCHEDULE CODE, or REASON CODE.

8. Click on ADD.

9. Click on GROUP CODE; then type in the abbreviation. The field will accept up to 10 characters (for example, ATHLETES, INTERNATL, VETERANS, and DROP-INS are examples of Specialty Group Codes).

10. Click on DESCRIPTION; then type a more complete description of the GROUP CODE (for example, Athletes). The field will accept up to 30 characters.

11. Click on SAVE.

12. When in the SCHEDULE CODE GROUP TYPE mode, follow the additional steps for each Schedule Code Group:

    a. Click on a Schedule Code Group description.

    b. Click on the INCLUDE IN GROUP TOTALS checkbox if the code should be included in the total count of advisors' hours on the Master Schedule Report. The column adjacent to the group code will indicate whether hours allocated to that code will be counted (Yes) or not (No). Generally, all Schedule Code Groups should have this option checked EXCEPT FOR the following:

       ESARSAPPT
       ESARSGROUP

    Explanation
    If appointments (both individual and group) made via the web interface (e·SARS) are allowed to be included in Schedule Code Group totals, there will be duplicate counting of work hours for advisors by group type. This summary display of group hours is shown on the Master Schedule Report. (See Part VI, Section 35.8, Master Schedule Report.)

    c. Repeat steps a – b for other Schedule Code Group Codes.

13. Repeat steps 7 – 12 to add additional Group Codes.

5.3.2 Use Classes as Specialty Groups

If classes have been imported from the school database for the desired Location, they may be selected for use as specialty groups. The sole purpose for this feature is for use by students making tutoring appointments using the web interface (e·SARS). This will ensure that the student makes an appointment with a tutor who has expertise in the particular class.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired location.
5. Click on PROPERTIES.
6. Click on the GROUP CODES tab.
7. In GROUP TYPE, click on SPECIALTY.
8. Click on CREATE. A CREATE SPECIALTY GROUPS screen will be displayed. Here is an example:

9. Click on the check box adjacent to each class to be made available as a specialty group, or click on SELECT ALL to make all classes available for this purpose.
10. Click on OK.

5.3.3 Change Information about a Group Code

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the GROUP CODES tab.
7. In the GROUP TYPE box, click on the desired category (SPECIALTY, SCHEDULE CODE, or REASON CODE) to display the codes assigned to that GROUP TYPE.
8. Click on the Group Code to be changed.
9. Enter the desired changes.
10. Click on SAVE.

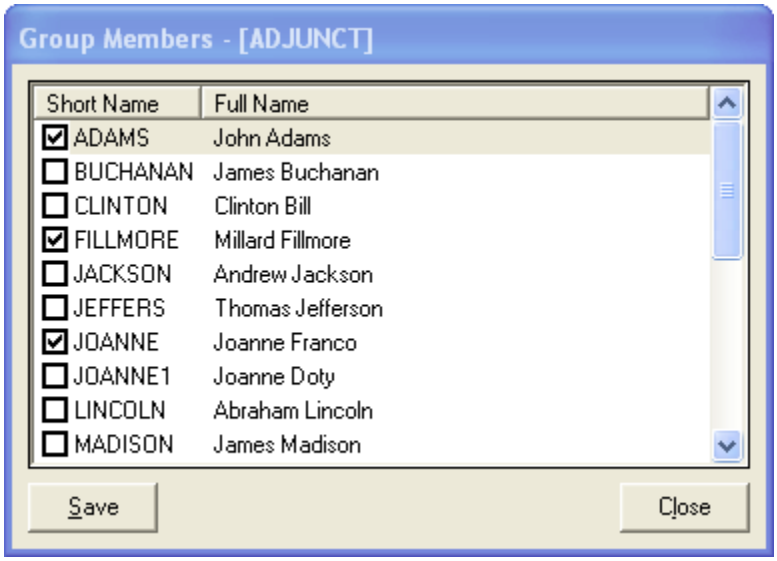
5.3.4 Delete a Group Code

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired location.
5. Click on PROPERTIES.
6. Click on the GROUP CODES tab.
7. In the GROUP TYPE box, click on the desired category (SPECIALTY, SCHEDULE CODE, or REASON CODE) to display the codes assigned to that GROUP TYPE.
8. Click on the Group Code to be deleted.
9. Click on DELETE. A confirmation message will be displayed.
10. Click on YES to confirm the deletion. The code and its description will be deleted from the list for that Location.

5.3.5 Assign a Short Name to a Specialty Code Group

An advisor is always assigned to the default, ALL GROUPS, even if that individual is later assigned to one or more specific specialty group codes. Advisors may be assigned to more than one specialty group, and more than one advisor may be assigned to the same group.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired location.
5. Click on PROPERTIES.
6. Click on the GROUP CODES tab.
7. In GROUP TYPE, click on SPECIALTY.
8. Click on the selected Group Code name and description.
9. Click on MEMBERS to display the GROUP MEMBERS screen for the selected group code. Here is an example:



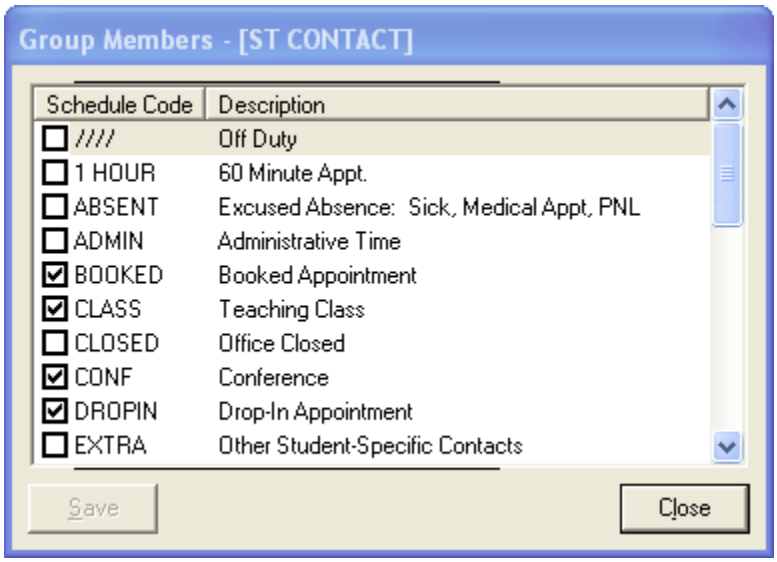
10. Click on the checkbox(es) adjacent to the Short Names to be assigned to this Specialty Group (or uncheck a box to remove an individual from the group).
11. Click on SAVE.
12. Repeat steps 8 – 11 to assign individuals to other Specialty Groups.
13. Click on CLOSE.

5.3.6 Assign a Schedule Code to a Schedule Code Group

Notes
Schedule Codes must be assigned to any Schedule Code Group that is to be used for e·SARS.

A Schedule Code may be assigned to more than one Schedule Code Group.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired location.
5. Click on PROPERTIES.
6. Click on the GROUP CODES tab.
7. In GROUP TYPE, click on SCHEDULE CODE.
8. Click on the selected Group Code name and description.
9. Click on MEMBERS to display the GROUP MEMBERS screen for the selected group code. Here is an example:



10. Click on the checkbox(es) adjacent to the Schedule Code(s) to be assigned to this Schedule Code Group (or uncheck a box to remove a Schedule Code from the group).
11. Click on SAVE.
12. Repeat steps 8 – 11 to assign Schedule Codes to other Schedule Code Groups.
13. Click on CLOSE.

5.3.7 Assign a Reason Code to a Reason Code Group

Notes
Reason Codes must be assigned to any Reason Code Group that is to be used for e·SARS. Also, a Reason Code may be assigned to more than one Reason Code Group.

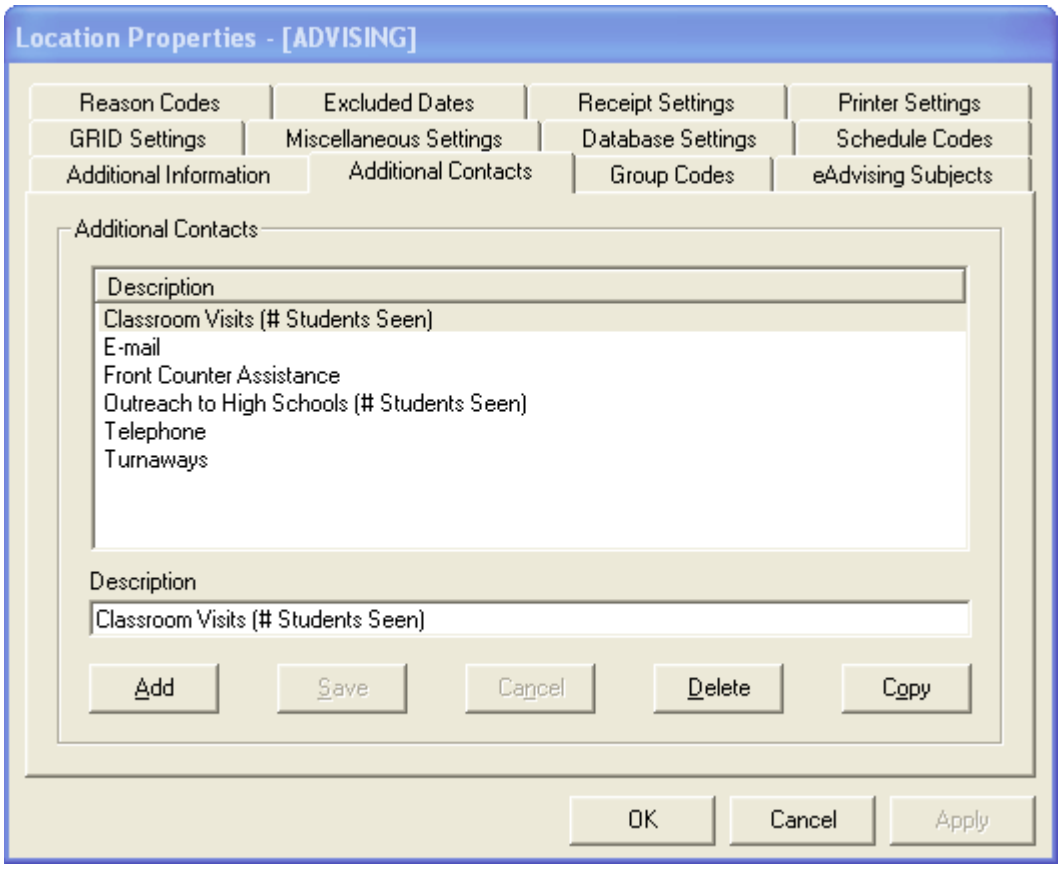
1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired location.
5. Click on PROPERTIES.
6. Click on the GROUP CODES tab.
7. In GROUP TYPE, click on REASON CODE.
8. Click on the selected Group Code name and description.
9. Click on MEMBERS to display the GROUP MEMBERS screen for the selected group code. Here is an example:

10. Click on the checkbox(es) adjacent to the Reason Code(s) to be assigned to this Reason Code Group (or uncheck a box to remove a Reason Code from the group).
11. Click on SAVE.
12. Repeat steps 8 – 11 to assign Reason Codes to other Reason Code Groups.
13. Click on CLOSE.

5.4 Additional Contacts

The Additional Contacts screen is used to establish a list of categories, such as e-mail, in-person, or telephone contact, for the purpose of keeping a tally on a daily basis of all non-appointment student contacts. Each location may create its own Additional Contacts descriptions.

Here is an example of the screen layout.



The options are:

- DESCRIPTION: Use to enter a label for the type of contact. For example, "Telephone."
- ADD: Use to enable the DESCRIPTION field for a new entry.
- SAVE: Use to save new entries or changes made on the screen.
- CANCEL: [ADDITIONAL CONTACTS screen] Use to terminate the action without saving.
- DELETE: Use to remove data.

- COPY: Use to copy existing Additional Contacts items from other Locations to the current list of the selected Location.
- OK: Use to save entries or changes and close the LOCATION PROPERTIES screen.
- CANCEL: [LOCATION PROPERTIES screen] Use to cancel the actions without saving.
- APPLY: Use to save entries or changes without closing the LOCATION PROPERTIES screen.

5.4.1 Add an Additional Contact Description

In order to use the Contacts feature on THE GRID or MY GRID, a list of categories of contacts must first be established.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired location.
5. Click on PROPERTIES.
6. Click on the ADDITIONAL CONTACTS tab.
7. Click on ADD. The Description field will be enabled.
8. Type in a description of the type of contact. The field will accept up to 50 characters.
9. Click on SAVE.
10. Repeat steps 7 – 9 to add more Additional Contacts descriptions.
11. Click on APPLY. If desired, then click on the ADDITIONAL INFORMATION tab (see “Add an Additional Information Question” at Section 5.5.1 in this Part).

    -or-

12. Click on OK to return to LOCATION MAINTENANCE.

5.4.2 Copy an Additional Contact Description from another Location

If Additional Contact Descriptions have already been added for other Locations, they may be copied into this Location rather than adding them from scratch.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.

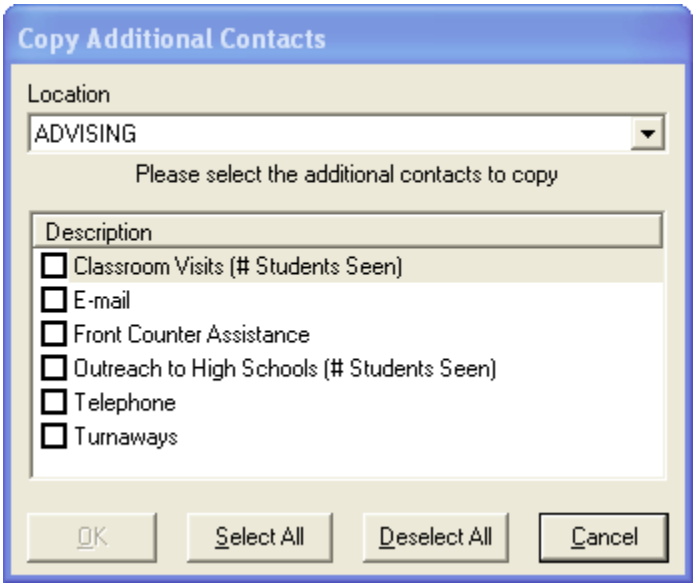
3. Click on LOCATION MAINTENANCE.

4. Click on the Location to which Additional Contacts are to be copied.

5. Click on PROPERTIES.

6. Click on the ADDITIONAL CONTACTS tab.

7. Click on COPY. A COPY ADDITIONAL CONTACTS screen will be displayed. Here is an example:



The options are:

LOCATION:	Use to select the Location from which existing Additional Contacts will be copied.
OK:	Use to initiate the Copy action.
SELECT ALL:	Use to select all Additional Contacts.
DESELECT ALL:	Use to de-select all Additional Contacts.
CANCEL:	Use to exit the screen.

8. Click on LOCATION ▼ and then select the Location that contains the Additional Contacts Descriptions to be copied to the current Location.

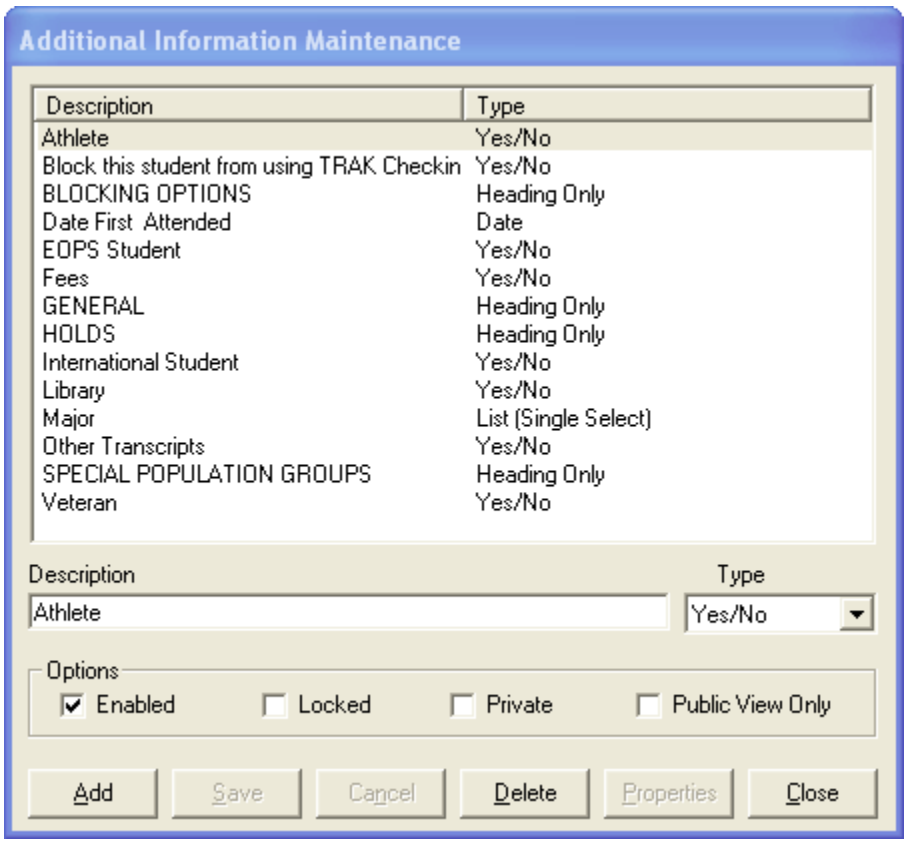
9. Click on the checkbox adjacent to any description to be copied or click on SELECT ALL to copy all Additional Contacts on the list.

10. Click on OK. The selected Additional Contacts will be copied to the desired Location.

5.5 Additional Information

The Additional Information screen is used to enter a series of questions and types of responses for those questions that will provide more detailed information about the student (such as the student's association with a special population group) and to establish the usability and privacy status of each question. It is also used to select the Additional Information questions to be used for a particular Location. The questions will apply to all students in the selected Location. Typically, additional information is imported from the school's database, in which case the description option should be "locked" so that users cannot change the additional information associated with any student. If users will be allowed to make such changes, they will be able to record specific responses from THE GRID using its COMMAND MENU, the STUDENT APPOINTMENT SCREEN, and MY GRID. Each Location may create its own set of Additional Information questions.

Here is an example of the Additional Information Maintenance screen, which displays items in alphabetical order.



The options are:

- DESCRIPTION: Use to hold the question that will provide more detailed information about the student.
- TYPE: Use to establish the format of the response allowed for the question. The options are:

  DATE: Use to specify that the question requires a date response (e.g., Date First Attended? = Date).

HEADING ONLY:	Use to specify that the question should be used only as a heading.
LIST (MULTI-SELECT):	Use to specify that the user may select more than one question from the list of responses.
LIST (SINGLE SELECT):	Use to specify that one question may be selected from the list of responses.
TEXT:	Use to specify that the question requires an alpha or numeric response.
YES/NO:	Use to specify that the question requires a Yes or No response.

- OPTIONS: Use to establish whether an additional information field will be displayed on the screen.

ENABLED:	If this option is checked, users in all Locations will be permitted to view the Additional Information question, unless PRIVATE is also checked, and users will be permitted to change the answer, unless LOCKED or PUBLIC VIEW ONLY is also checked.
LOCKED:	If this option is checked, users in all Locations will be prevented from changing the answers to the Additional Information question.
PRIVATE:	If this option is checked, users in other Locations will not know of the existence of this Additional Information question.
PUBLIC VIEW ONLY:	If this option is checked, users in other Locations may view the Additional Information, unless PRIVATE is also checked. They will be prevented from changing the answer.

- ADD: Use to enable the DESCRIPTION and TYPE fields for a new entry.
- SAVE: Use to save new entries or changes made on the screen.
- CANCEL: Use to terminate the action without saving.
- DELETE: Use to remove data.
- PROPERTIES: Use to create a list of answers from which to choose when answering an Additional Information item that uses a LIST response.
- CLOSE: Use to exit the screen.

5.5.1 Add an Additional Information Question

In order to use the Additional Information feature in SARS·GRID, a list of questions must first be created using the ADDITIONAL INFORMATION MAINTENANCE screen.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the ADDITIONAL INFORMATION tab. A list of any questions created by this or other Locations will be displayed.
7. Click on ADDITIONAL INFORMATION MAINTENANCE.
8. To create a question, click on ADD.
9. In the DESCRIPTION field, type the question for obtaining more detailed information about the student (for example, Transfer student? Major? or Expected graduation date?). The field will accept up to 50 characters.
10. Click on TYPE ▼, and then select the format for the response.
    a. To specify that the answer requires a date to be entered, select DATE.
    b. To specify that the response should be listed only as a header, select HEADING ONLY. Items that are Headers should be re-sorted using the Display Order screen so that they appear as a heading with a grey background on the Additional Information screen when viewed from THE GRID or MY GRID, and any questions that belong under that heading are placed directly below it. (See Section 5.5.5 below.)
    c. To enable the user to select multiple answers from a pre-established list, select LIST (MULTI-SELECT). The PROPERTIES button will be enabled.
        i) Click on PROPERTIES to display the ADDITIONAL INFORMATION LIST screen.
        ii) Click on ADD.
        iii) In the DESCRIPTION field, enter an item to be placed on the List for that question. For example, if the question is “Special Programs,” you may wish to enter the answer “International Student.”
        iv) Click on SAVE.
        v) Repeat steps ii) – iv) until all the items on the List have been entered.
        vi) Click on CLOSE.
    d. To permit the user to select only one answer from a pre-established list, select LIST (SINGLE SELECT). The PROPERTIES button will be enabled.

i) Click on PROPERTIES to display the ADDITIONAL INFORMATION LIST screen.

ii) Click on ADD.

iii) In the Description field, enter an item to be placed on the List for that question. For example, if the question is "Special Programs," you may wish to enter the answer "International Student."

iv) Click on SAVE.

v) Repeat steps ii) – iv) until all the items on the List have been entered.

vi) Click on CLOSE.

e. To specify that the answer requires a text response (either alpha or numeric), select TEXT.

f. To specify that the answer requires a Yes or No response, select YES/NO.

11. In the OPTIONS field, choose one or more of the following options:

a. Click on ENABLE to permit users in all Locations to view the Additional Information question and answer, unless PRIVATE is checked. This option will also enable users to change an answer, unless LOCKED or PUBLIC VIEW ONLY is also checked.

b. Click on LOCKED to prevent users in all Locations from changing the Additional Information answer.

c. Click on PRIVATE to prevent users in other Locations from knowing that the Additional Information question exists.

d. Click on PUBLIC VIEW ONLY to enable users in other Locations to view the Additional Information question, but not to change the answer.

12. Click on SAVE.

5.5.2 Select Additional Information Questions for Use

Once Additional Information questions have been created on the ADDITIONAL INFORMATION MAINTENANCE screen, they must be selected for use by a Location.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

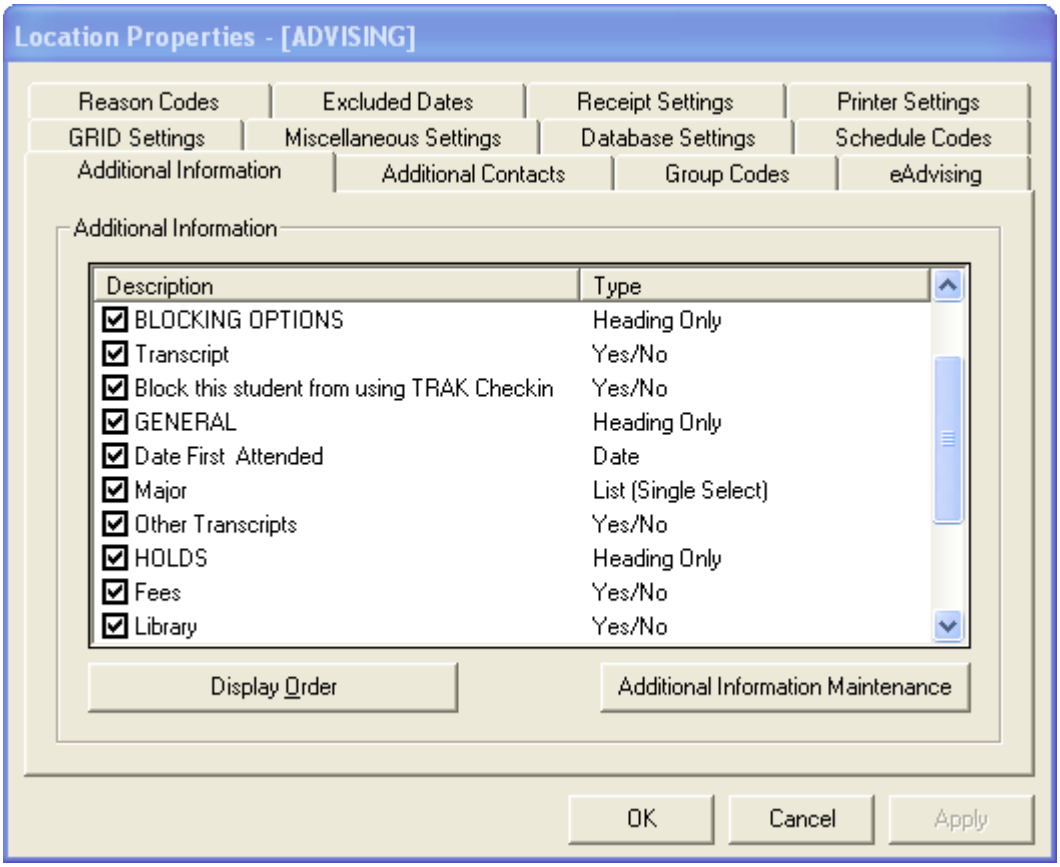
3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the ADDITIONAL INFORMATION tab.

Here is an example of the screen that will be displayed:



The options are:

- DESCRIPTION: Used to display a list of existing additional information questions.
- TYPE: Used to display the format for each question.
- DISPLAY ORDER: Use to change the order in which the additional information questions appear on the list when viewed from THE GRID or MY GRID. (See Section 5.5.5 in this Section.)
- ADDITIONAL INFORMATION MAINTENANCE: Use to gain access to the Additional Information Maintenance screen to add, change, or delete an additional information question. (See Sections 5.5.3 and 5.5.4 in this Section.)
- OK: Use to save entries or changes and close the LOCATION PROPERTIES screen.
- CANCEL: Use to cancel the actions without saving.
- APPLY: Use to save entries or changes without closing the LOCATION PROPERTIES screen.

7. Click on the checkbox adjacent to each Description to be used by this Location.

8. Click on APPLY.

9. When done, click on OK. The selected questions will be available to any user who has been given access rights to "Additional Information" for the selected Location. Those users will be able to complete the answers to the questions from THE GRID, MY GRID, and the STUDENT APPOINTMENT screen.

5.5.3 Change an Additional Information Question

Changes to an Additional Information question may only be made in the Location where it was created.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the ADDITIONAL INFORMATION tab.

7. Click on ADDITIONAL INFORMATION MAINTENANCE.

8. Click on the question to be changed. The DESCRIPTION, TYPE and OPTIONS settings that were created for the question will be displayed in the boxes below.

   Warning
   Once additional information has begun to be collected about a student, an established Description should not be changed. Instead of changing a Description, it is advisable to add a Description on a **new** line. Leave the obsolete Description in place but disabled so that it does not appear on the ADDITIONAL INFORMATION screen.

9. If the question has not yet been used in any Location, the Type format may be changed.

   a. Click on the description to be changed.

   b. Click on TYPE ▼, and then select a different format for the response.

   c. Click on SAVE.

10. In the OPTIONS field, select or deselect one or more of the following options:

    a. Click on the checkbox to select or deselect ENABLE, which permits users in this Location to view the Additional Information question and answer.

    b. Click on the checkbox to select or deselect LOCKED, which prevents users in this Location from changing the Additional Information answer.

    c. Click on the checkbox to select or deselect PRIVATE, which prevents users in other Locations from knowing that the Additional Information question exists.

d. Click on the checkbox to select or deselect PUBLIC VIEW ONLY, which enables users in other Locations to view the Additional Information question, but not change the answer.

11. Click on SAVE.

12. Click on CLOSE.

13. Click on OK to exit the ADDITIONAL INFORMATION screen.

5.5.4 Delete an Additional Information Question

Caution
An Additional Information Description should not be deleted once additional information has begun to be collected about a student. Instead, consider de-selecting the question from the Additional Information screen for your Location.

In rare instances when an Additional Information question needs to be deleted, follow the steps below.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the ADDITIONAL INFORMATION tab.

7. Click on ADDITIONAL INFORMATION MAINTENANCE.

8. Click on the question to be deleted. The DESCRIPTION, TYPE and OPTIONS settings that were created for the question will be displayed in the boxes below.

9. Click on DELETE. A confirmation message will be displayed.

10. Click on YES.

11. Click on CLOSE.

12. Click on OK to exit the ADDITIONAL INFORMATION screen.

5.5.5 Change the Display Order of Additional Information Questions

The display order of the Additional Information questions may individualized on a Location by Location basis. If Headings are used, each Heading should be placed above any items that should be grouped directly below it.

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

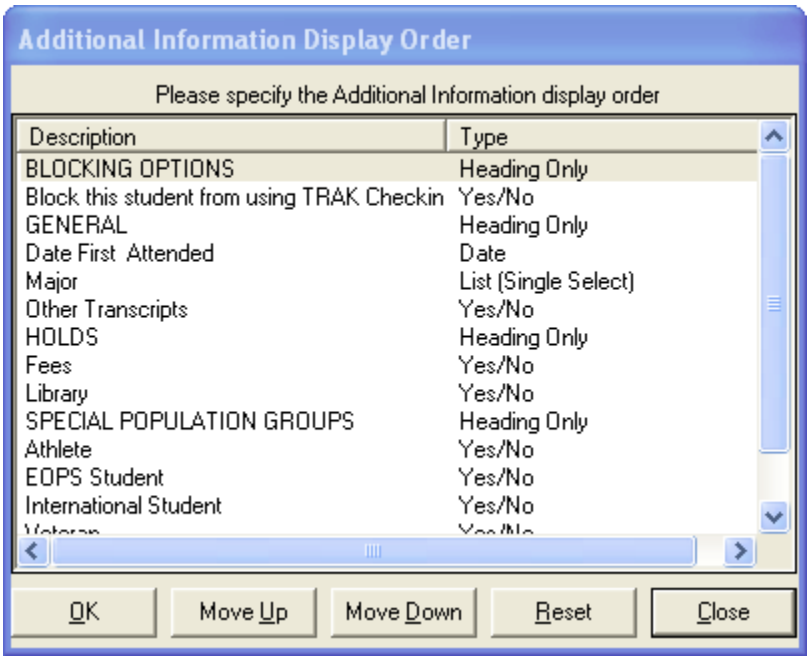
3. Click on LOCATION MAINTENANCE.

4. Click on the desired Location.

5. Click on PROPERTIES.

6. Click on the ADDITIONAL INFORMATION tab.

7. Click on DISPLAY ORDER to display an ADDITIONAL INFORMATION DISPLAY ORDER screen. Here is an example of the Display Order screen showing descriptions grouped under items designated as Headings:



The options are:

- DESCRIPTION: Used to display a list of additional information questions.
- TYPE: Used to display the format of the adjacent additional information question. The options are: Date, Heading Only, List (Multi-Select), List (Single Select), Text, and Yes/No.
- OK: Use to save the changes to the display order screen and return to the Additional Information screen.
- MOVE UP: Use to move a selected question up one level.
- MOVE DOWN: Use to move a selected question down one level.
- RESET: Use to return the display order to the default, which is alphabetical order.
- CLOSE: Use to exit the screen.

8. Click on one of the questions to be moved either up or down. Then click on Move Up or Move Down as appropriate.

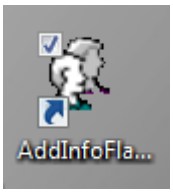
9. Repeat step 8 until the questions are listed in the desired order.

10. Click on OK to save the changes and return to the Additional Information screen.

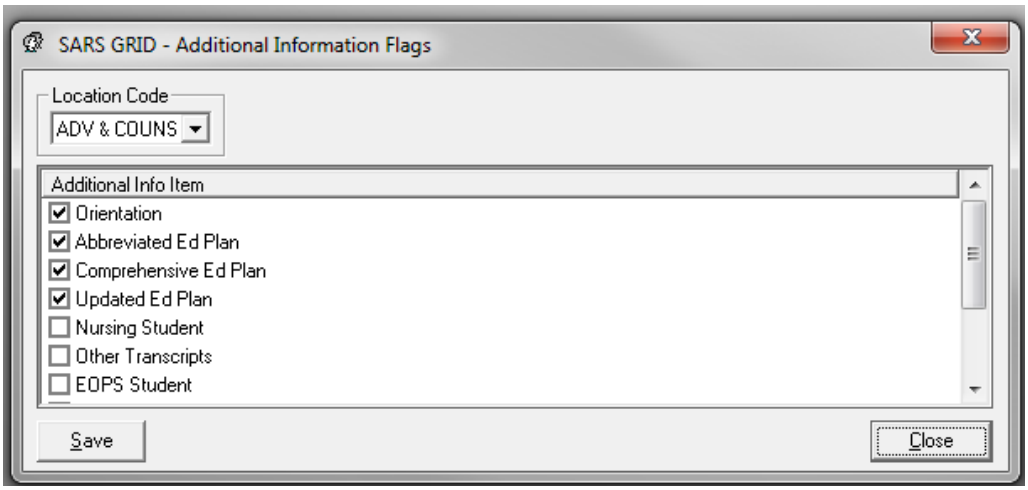
5.5.6 Select Additional Info Flags for Display on the Student Appointment and Drop-in Screens

A separate utility, called ADDINFO FLAGS, is available to enable users to place up to four additional information questions that can be answered with a "Yes" or "No" response on the STUDENT APPOINTMENT SCREEN, as well as the DROP-IN APPOINTMENT SCREEN. It is useful for alerting advisors of a student's status, such as whether the student has attended Orientation, has completed an Ed Plan, etc. Although the same information is available on the full ADDITIONAL INFORMATION screen, this feature makes it easier to view key information about the student. To use this feature, follow the steps below.

1. From the desktop, click the ADDINFO FLAGS icon. It looks like this:



2. Log in to the utility using your SARS password. The following screen will be displayed:



The options are:

- LOCATION CODE: Use to select the Location for which the Additional Information items will be displayed on THE STUDENT APPOINTMENT SCREEN and the DROP-IN APPOINTMENT SCREEN.

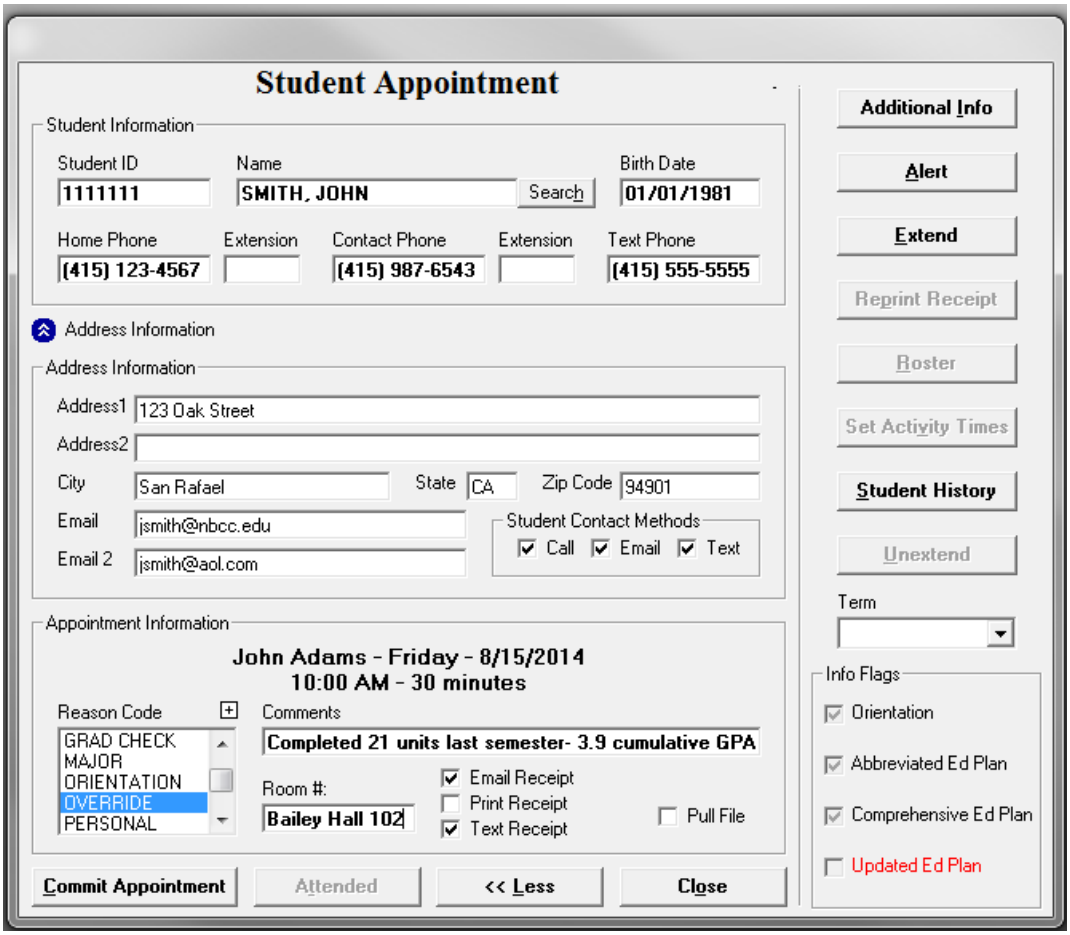
- ADDITIONAL INFO ITEM: Use to select or de-select between one and four questions to be displayed. Only questions that can be answered with a Yes or No response will be displayed.
- SAVE: Use to save the selections.
- CLOSE: Use to exit the screen.

3. Click on the check box adjacent to each ADDITIONAL INFO ITEM that should be displayed on the STUDENT APPOINTMENT SCREEN and the DROP-IN APPOINTMENT SCREEN. A maximum of four Yes/No items may be selected.

4. Click on SAVE.

5. Click on CLOSE.

When a user opens the fully-expanded STUDENT APPOINTMENT SCREEN or the DROP-IN APPOINTMENT SCREEN for a student, it will display the status of the student in the INFO FLAGS panel. Here is an example:



Note
Info Flags that are marked "Yes" are shown as checked. Info Flags that are marked "No" are shown unchecked and have a red font.

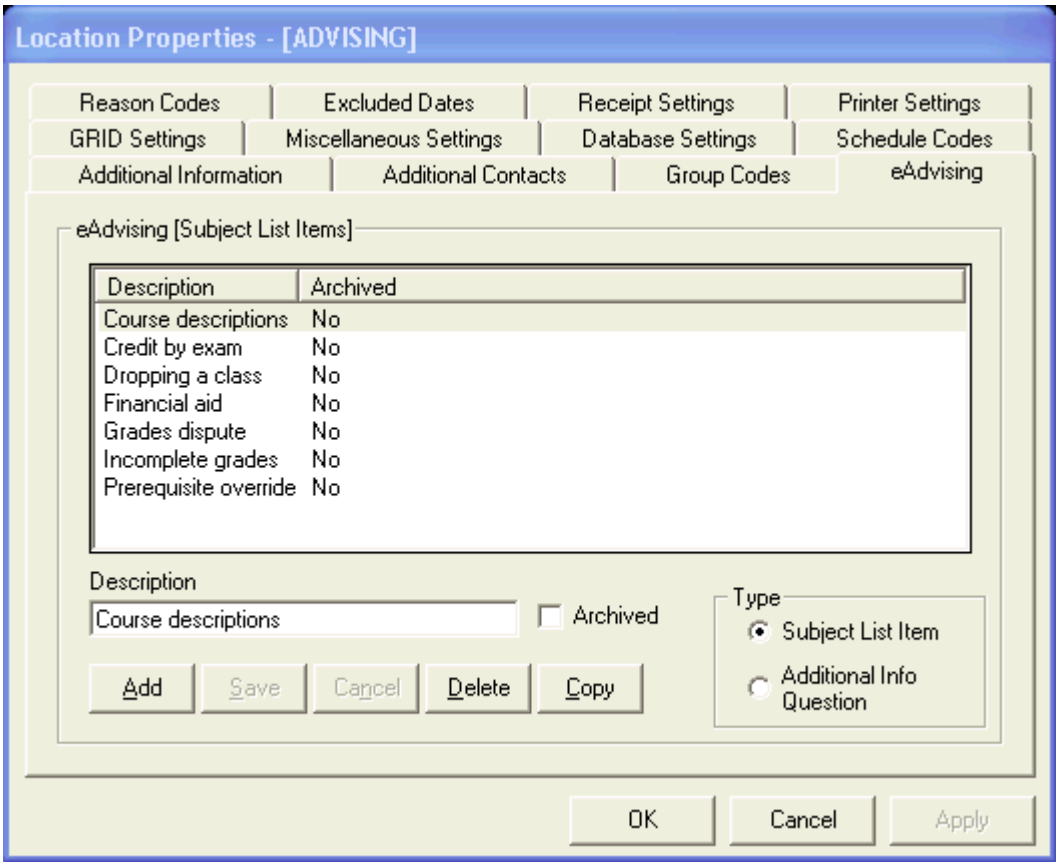
5.6 eAdvising

eAdvising is a module within SARS·GRID by which students may log in to the college's eAdvising URL to ask a question of an advisor. Students will be asked to select a subject area prior to writing a question. Advisors in the Location to which the questions are sent can then access the questions from MY GRID and reply as appropriate. The eAdvising module must first be set up. Once an eAdvising question is answered, it is automatically sent to the Notepad and designated as a *Private* note, visible only to the advisor who answered the question.

The eAdvising screen is used to add, change, delete or archive subject categories that will be available to students for selection when they log into the eAdvising module to ask questions of advisors. The selected subject will be placed on the Subject Line in the email message. The screen may also be used to copy existing eAdvising subjects from one Location to another. These categories will be useful for sorting for reporting purposes. It is recommended that a generic category, such as "Other," also be created as a catch-all category. The selected eAdvising topic will be displayed on the eAdvising Q & A screen as "Subject."

An option exists to also select an Additional Information Question that is designated as a "List (Single-Select)" type of question, to select it for use, and to include one or more items from a list to be associated with the Additional Information Question. Students will then be able to select from that list.

Here is an example of the screen layout.



The options are:

- DESCRIPTION: Use to enter a complete description of the eAdvising subject matter.
- ARCHIVED: Use to archive an unneeded eAdvising subject. Archived subjects will no longer appear as a drop down selection when the student is creating an eAdvising question in the web interface.
- ADD: Use to make fields available to enter new data.
- SAVE: Use to save new entries or changes.
- CANCEL: Use to terminate an action without saving.
- DELETE: Use to delete an eAdvising subject. Only subjects that have never been used in an eAdvising query may be deleted.
- COPY: Use to transfer one or more eAdvising subjects from one Location to another Location for use.
- TYPE:
  - SUBJECT LIST ITEM: Use to enable the screen to view a list of subjects and to add, change, delete, or archive a subject.
  - ADDITIONAL INFO QUESTION: Use to enable the screen to view a list of Additional Information Questions and to select for use, assign members to, or remove an Additional Information Question. Only one Additional Information Question may be selected for use at a given time in a given Location.
- OK: Use to save new entries or changes and exit the screen.
- CANCEL: Use to terminate the action without saving.
- APPLY: Use to establish the selected settings and remain on the screen.

5.6.1 Add an eAdvising Subject

1. First check to see whether eAdvising subjects have been created for another Location. If so, they may be copied to this Location, eliminating the need for duplicate efforts. (See Copy an eAdvising Subject from another Location at Section 5.6.4 in this Section.)
2. From the SARS·MENU, click on UTIL.
3. Click on SYSTEM ADMINISTRATION.
4. Click on LOCATION MAINTENANCE.

5. Click on the desired Location.

6. Click on PROPERTIES.

7. Click on the EADVISING tab.

8. To add an eAdvising subject,

   a. Click on SUBJECT LIST ITEM in the Type panel. This will enable the ADD button.

   b. Click on ADD.

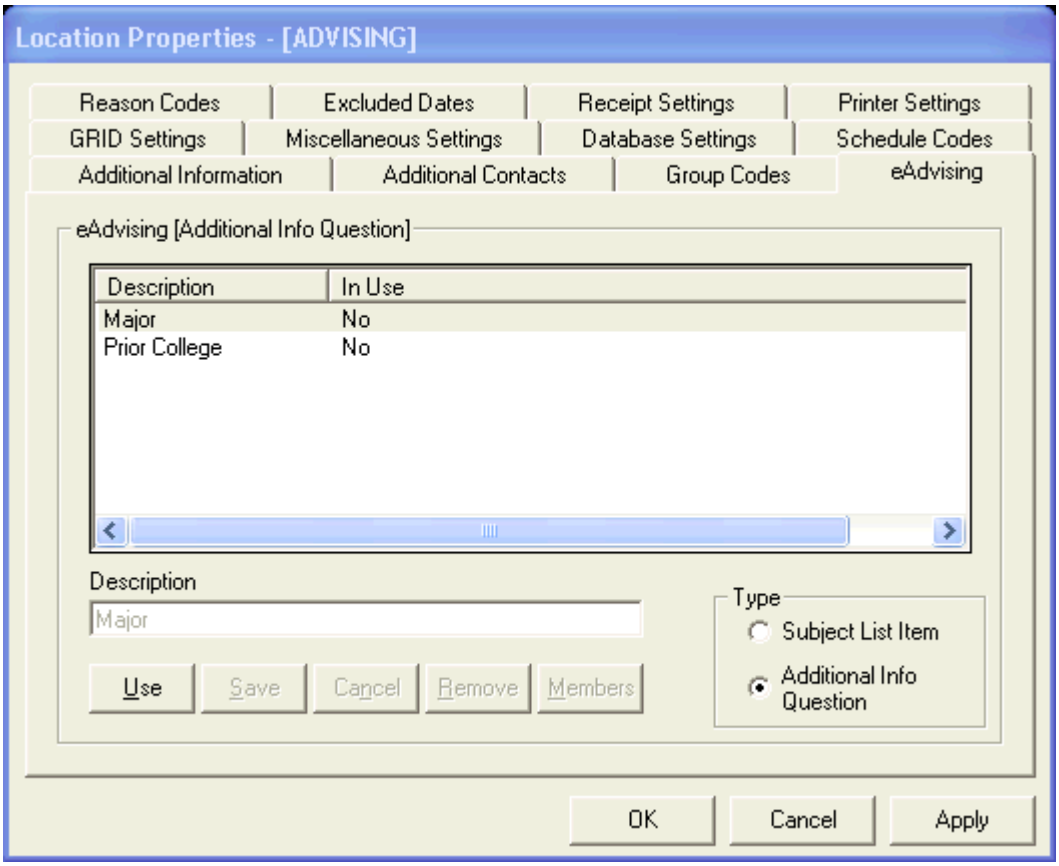
   c. Click on the DESCRIPTION field and type in the complete description that represents the type of question that a student may choose (e.g., Personal Question). The field will accept up to 50 characters.

   d. Click on SAVE. The eAdvising subject will be added to the list.

9. Repeat step 8 to create additional eAdvising subjects.

10. To select an Additional Information Question (e.g., Major) so that students may select from a list of associated items (members),

    a. Click on ADDITIONAL INFO QUESTION in the Type panel. This will display one or more Additional Information Questions that have been created in Additional Information for the selected Location and that are designated as "List (Single Select)" types. Here is an example:



The options are:

- DESCRIPTION: Used to display Additional Information Questions that are designated as “List (Single Use)” types of questions.
- IN USE: Used to display which question is selected for use with an eAdvising subject. Only one question may be selected for use.
- USE: Use to designate a selected Additional Information Question to be made available to students when selecting a topic.
- SAVE: [disabled]
- CANCEL: [disabled]
- REMOVE: Use to make a selected Additional Information Question unavailable for use.
- MEMBERS: Use to display a screen on which selections may be made for inclusion with the selected Additional Information Question.

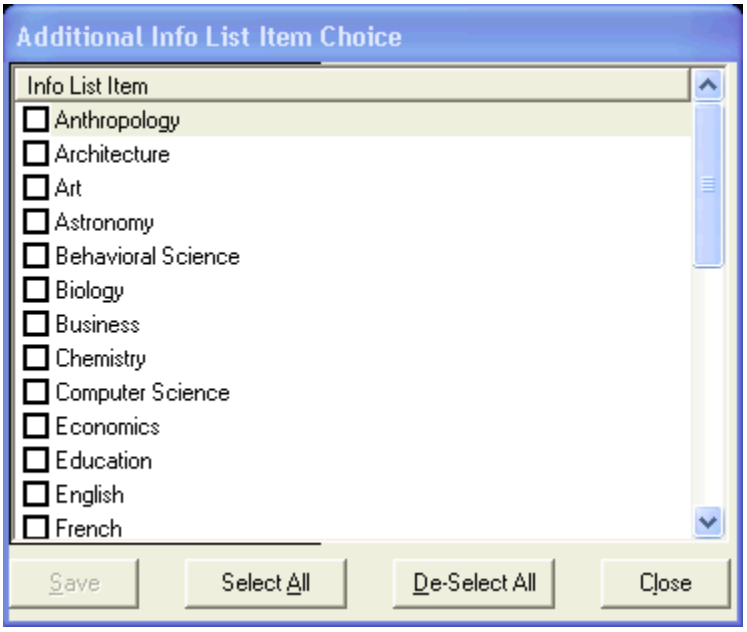
b. Click on the description for the Additional Information Question (e.g., Major). This will enable the Use button.

c. Click on USE. The IN USE column will change from No to Yes.

d. Click on APPLY.

e. With the focus on the Additional Information Question that is in use, click on MEMBERS. This will display a screen which may be used to select specific items for inclusion with the Additional Information Question. For example, if the Additional Information Question is “Major,” a list of all majors will be displayed. Any or all such items may be selected.

Here is an example:



f. Click on the checkbox adjacent to each Info List Item for inclusion with the Additional Information Question, or click on SELECT ALL to include all items.

g. Click on SAVE.

11. Click on OK when done.

5.6.2 Change Information about an eAdvising Subject

1. From the SARS·MENU, click on UTIL.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the eADVISING tab.
7. Click on SUBJECT LIST ITEM in the Type panel.
8. Click on the desired eAdvising subject.
9. Type in the applicable change in the DESCRIPTION field.
10. Click on SAVE.
11. Click on OK.

5.6.3 Delete an eAdvising Subject

Only eAdvising subjects that have not been used may be deleted.

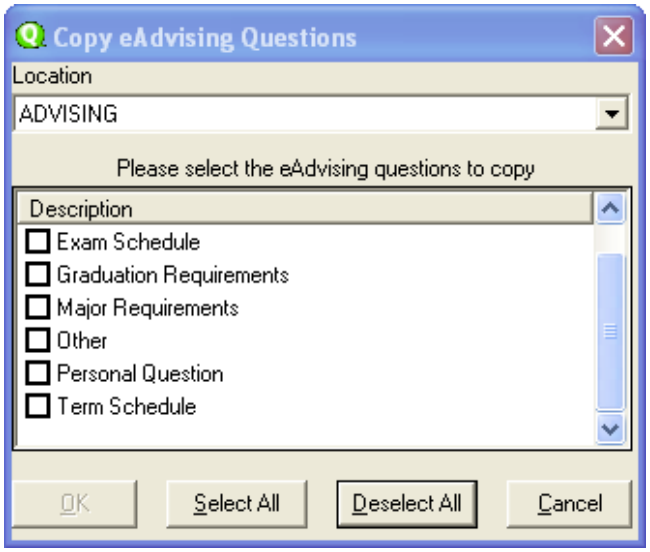
1. From the SARS·MENU, click on UTIL.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the eADVISING tab.
7. Click on SUBJECT LIST ITEM in the Type panel.
8. Click on the desired topic. The existing description will be displayed in the boxes below.
9. Click on DELETE. A confirmation message will be displayed.
10. Click on YES to confirm the deletion.
11. Click on OK.

5.6.4 Copy an eAdvising Subject from another Location

Any eAdvising Subject that has been created for one Location may be selected for use by other Locations via the COPY function.

1. From the SARS·MENU, click on UTIL.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the eADVISING tab.
7. Click on SUBJECT LIST ITEM in the Type panel.
8. Click on COPY. A COPY eADVISING QUESTIONS sub-screen will be displayed.

Here is an example:



The options are:

- LOCATION: Use to select the location from which existing subjects are to be copied.
- DESCRIPTION: Use to check the boxes for the subjects to be copied.
- OK: Use to approve the selections.
- SELECT ALL: Use to check all of the subjects for copying to your Location.
- DESELECT ALL: Use to deselect all the subjects.
- CANCEL: Use to exit the screen without saving the selections.

9. Click on LOCATION ▼ and select the Location from which existing eAdvising subjects are to be copied.

10. Click on the checkbox adjacent to each eAdvising subject to be copied to the current Location. Any or all of the questions may be selected.

    -or-

    Click on SELECT ALL to check all boxes. The OK button will be enabled after the first eAdvising subject is selected.

11. Click on OK. The selected subjects will appear on the eADVISING SUBJECTS screen for that Location.

12. Click on OK.

5.6.5 Archive an eAdvising Subject

If an eAdvising subject has been used, it cannot be deleted. However, subjects used may be archived. Archiving prevents students from using that subject when submitting questions.

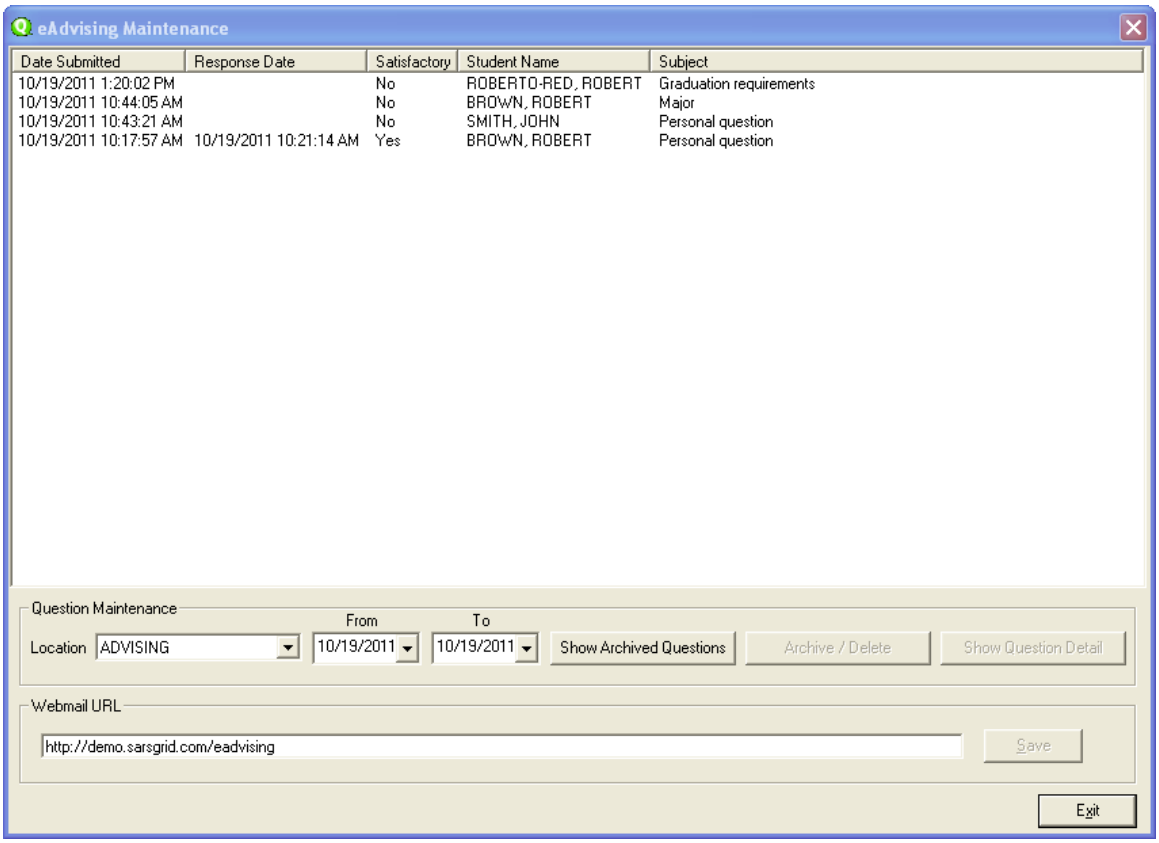
1. From the SARS·MENU, click on UTIL.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on the eADVISING tab.
7. Click on SUBJECT LIST ITEM in the Type panel.
8. Click on the subject to be archived. The ARCHIVE checkbox will be activated.
9. Click on the ARCHIVE checkbox.
10. Click on SAVE. The topic will be archived until the checkbox is unchecked.
11. Repeat steps 8 – 10 to archive another eAdvising subject.

5.7 eAdvising Maintenance

The eAdvising Maintenance screen is used initially to establish the college's specific URL through which eAdvising questions will be sent and answered.

After eAdvising subjects have been created and the eAdvising system has been used, the eAdvising Maintenance screen is used to view summary and detail information about all questions that have been submitted by students for a selected Location and date range. The screen may also be used to delete or archive one or more questions. Questions that have been answered may only be archived, not deleted. Questions that have not been answered may only be deleted, not archived.

Here is an example of the screen layout showing three questions that have no response and one message for which a response has been sent.



The screen will display a list of eAdvising questions containing the following information.

- DATE SUBMITTED: Indicates the date that the student submitted a question via the eAdvising web site.
- RESPONSE DATE: Indicates the date that an advisor replied to the question.
- SATISFACTORY: "Yes" indicates that the student has viewed the advisor's response and indicated that the response was satisfactory. "No" indicates that the student has either not viewed the response or has not found the response to be satisfactory.

- STUDENT NAME: Indicates the name of the student who posed the question.
- SUBJECT: Indicates the topic that was selected from a list of eAdvising subjects by the student.
- ARCHIVED: [Displayed only in Show Archived Questions mode] Indicates that the question has been archived.

The available options are:

- QUESTION MAINTENANCE: Use to manage questions pertaining to a specific Location and date range.

  LOCATION: Use to select the Location for which questions should be displayed.

  FROM: Use to select the first date of a date range for which questions should be displayed.

  TO: Use to select the last date of a date range for which questions should be displayed.

  SHOW ARCHIVED QUESTIONS/ HIDE ARCHIVED QUESTIONS: Use this toggle to display all archived questions when in the Show Archived Questions mode, and to hide all archived questions when in the Hide Archived Questions mode. Viewing in the Hide Archived Questions mode will shorten the list.

  ARCHIVE/DELETE (TOGGLE BUTTON): Use this toggle to archive one or more answered questions, to delete one or more unanswered questions that remain unanswered, or to both archive and delete a group of selected questions in one step.

  SHOW QUESTION DETAIL: Use to display a complete description of the questions, including the Subject, the Body of the question and the Reply message when a single message is selected.

- WEBMAIL URL: Use to specify the URL that will process the eAdvising emails.

  SAVE: Use to save the Webmail URL that has been entered.

- EXIT: Use to close the eAdvising Maintenance screen.

5.7.1 Establish the Webmail URL for eAdvising

Before the eAdvising module can function, the system administration will need to establish the web email URL that will be used to process all questions and responses. This is a one-time process only, unless the URL needs to be modified.

1. From the SARS·MENU, click on UTIL.
2. Click on SYSTEM ADMINISTRATION.
3. Click on eADVISING MAINTENANCE to display the eAdvising Maintenance screen.
4. Navigate to the WEBMAIL URL panel at the bottom of the screen.
5. Click on the WEBMAIL URL field and type in the path for the college's eAdvising webmail URL (e.g., nbcc.edu/sars/eAdvising). Here is an example:

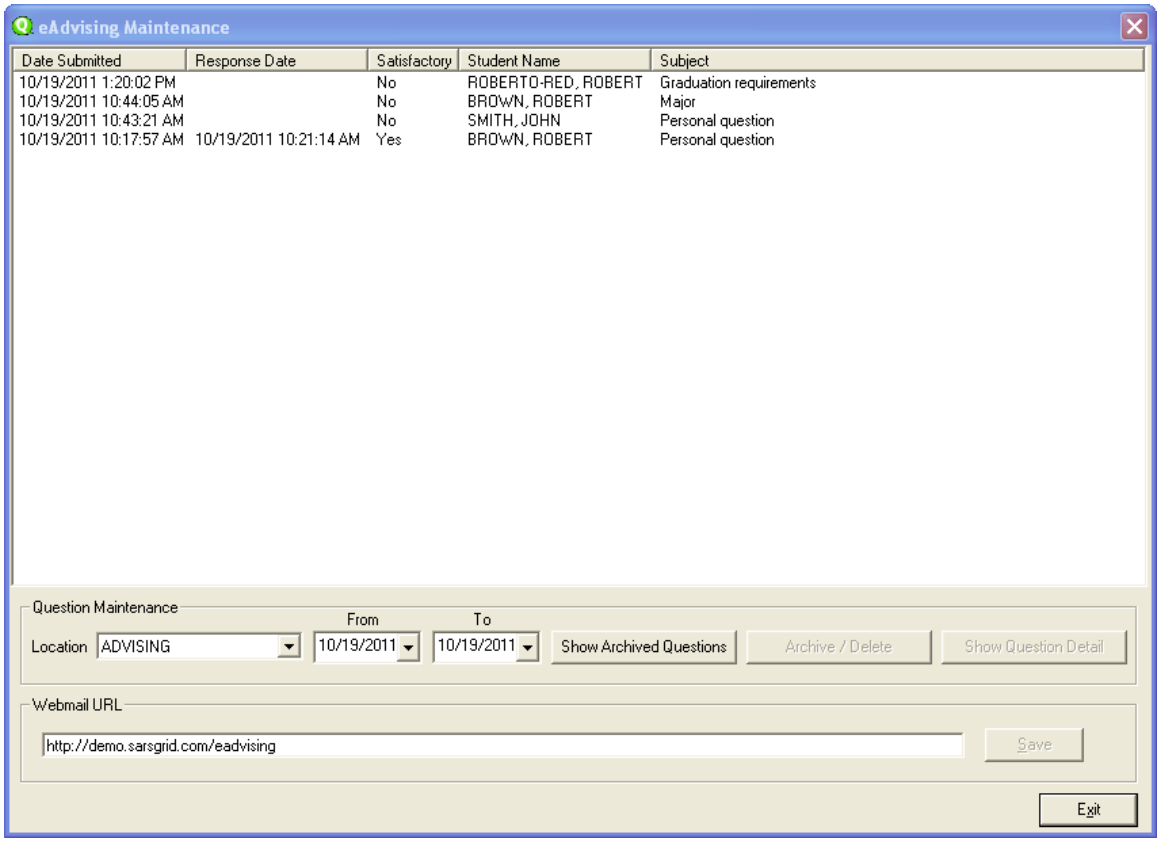
6. Click on SAVE.

5.7.2 Maintain eAdvising Messages

After the eAdvising module has been in use, the system administrator should, from time to time, use eAdvising Maintenance to archive and/or delete older eAdvising questions.

1. From the SARS·MENU, click on UTIL.
2. Click on SYSTEM ADMINISTRATION.
3. Click on eADVISING MAINTENANCE to display the eAdvising Maintenance screen. The initial screen defaults to a list of all questions for the user's primary Location that have not been archived.

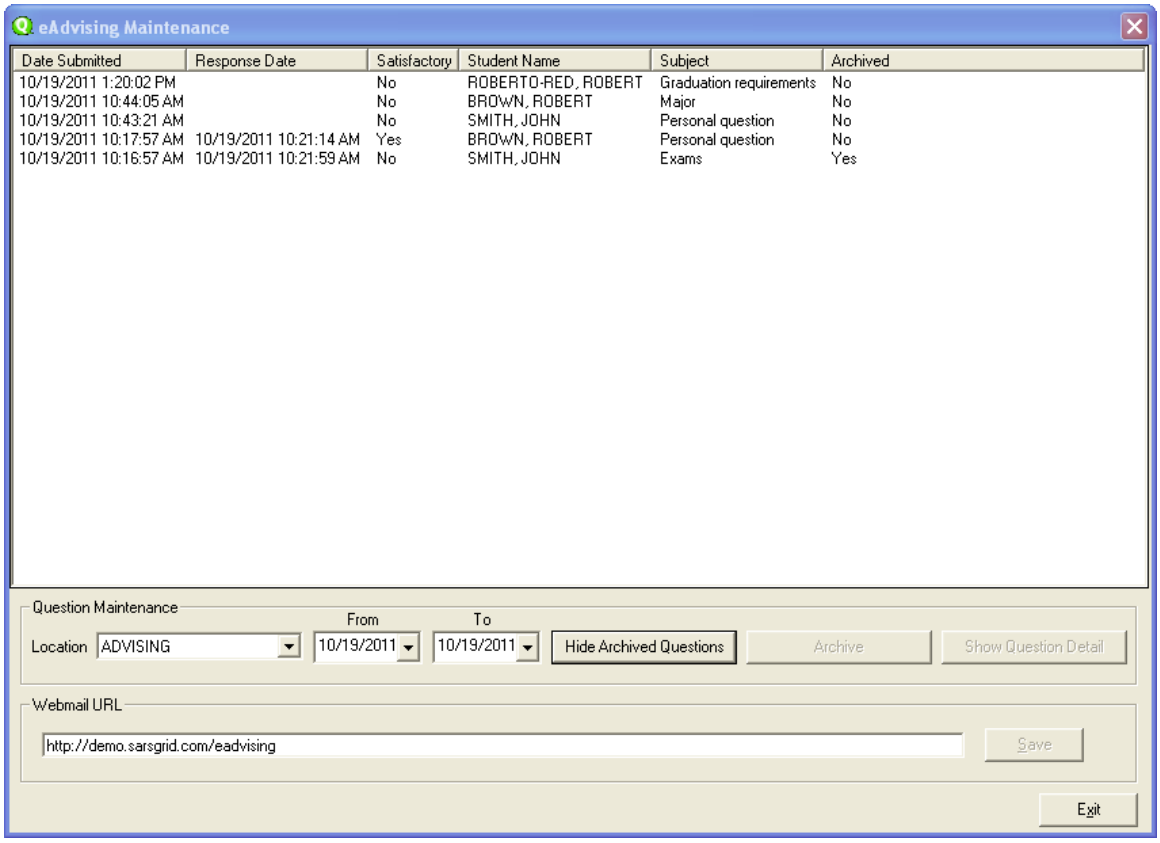
Here is an example:



Note
Unless the user clicks on a line containing a message, the only button available is SHOW ARCHIVED QUESTIONS, which will toggle the screen to show both archived and un-archived messages.

4. To display both archived and un-archived messages, click on SHOW ARCHIVED QUESTIONS to view all messages. The screen will change to display an additional column showing the archived status (Yes or No).

Here is an example:



Note
Unless the user clicks on a line containing a message, the only button available is HIDE ARCHIVED QUESTIONS, which will toggle the screen back to its original status.

5. Navigate to the QUESTION MAINTENANCE panel near the bottom of the screen.

6. Click on LOCATION ▼ and select the Location for which eAdvising questions should be displayed, if it is different from the Location that is displayed.

7. Click on FROM ▼ and type in the first date to be included in the date range, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)

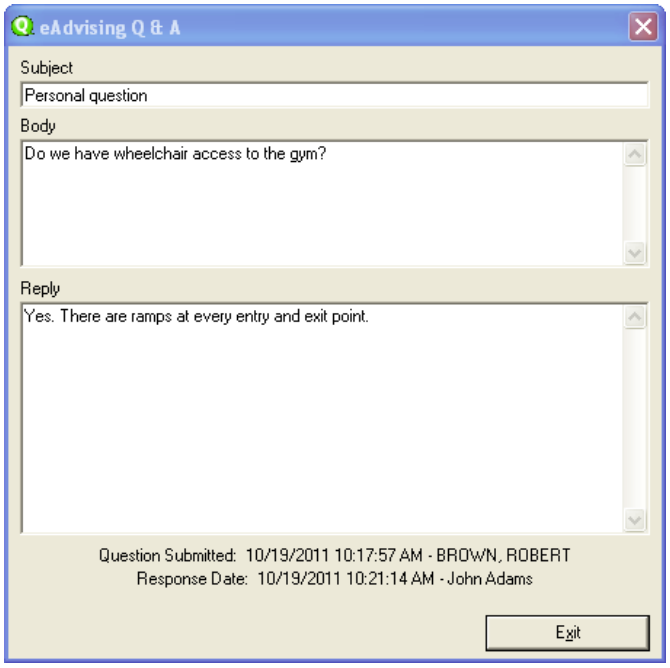
8. Click on TO ▼ and type in the last date to be included in the date range, or click on ▼ to use the Date Picker.

9. To view the entire content of a message,

   a. Click on the desired question. The SHOW QUESTION DETAIL button will be enabled.

   b. Click on SHOW QUESTION DETAIL. An eAdvising Q & A screen will be displayed.

Here is an example:



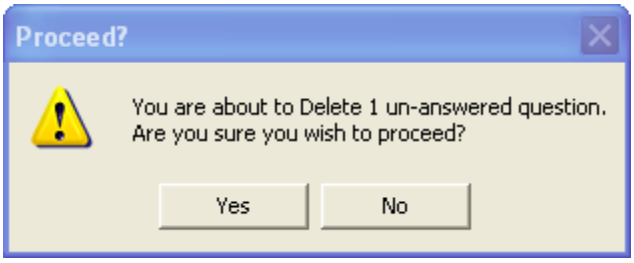
This read-only screen displays the Subject of the message (this conforms to the eAdvising Questions that were created for the selected Location), the Body of the message, the Reply (if any), as well as the date and time the question was submitted and the student's name, and the date and time the question was answered and the advisor's Short Name.

c. When done reviewing the details, click on EXIT to return to the eAdvising Maintenance screen.

10. To delete an <u>unanswered</u> question,

a. Click on the question to be deleted. The DELETE button will be enabled.

b. Click on DELETE. A confirmation screen will be displayed. Here is an example:



c. Click on YES to confirm the deletion.

11. To delete more than one <u>unanswered</u> question at a time,

a. Click on each line while holding down the CTRL key. Each question to be deleted will be highlighted.

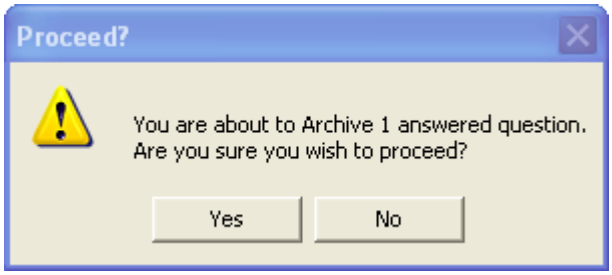
b. Click on DELETE. A confirmation screen will be displayed.

c. Click on YES to confirm the deletion.

12. Answered questions will display a date/time in the RESPONSE DATE column. To archive an answered question,

a. Click on the question to be archived. The ARCHIVE button will be enabled.

b. Click on ARCHIVE. A confirmation screen will be displayed. Here is an example:



c. Click on YES to confirm the action.

13. To archive more than one answered question at a time,

a. Click on each line while holding down the CTRL key. Each question to be archived will be highlighted.

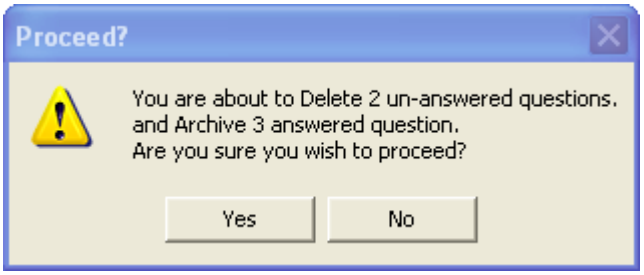
b. Click on ARCHIVE. A confirmation screen will be displayed.

c. Click on YES.

14. To archive and delete a mixed group of messages (answered and un-answered) in one step,

a. Click on each question to be archived and deleted while holding down the CTRL key. When both answered and unanswered questions are included in the grouping, the ARCHIVE / DELETE button will be enabled.

b. Click on ARCHIVE / DELETE. A confirmation screen will be displayed. Here is an example:



c. Click on YES.

15. When done using the eAdvising Maintenance screen, click on EXIT.

PART II – CREATE AND MODIFY WORK SCHEDULES

Part II is for use by system administrators, as well as schedulers and advisors who are granted access rights to create schedules. This part consists of the following sections:

SECTION 6 — CREATE MASTER SCHEDULES

6.0 Overview

This Section describes those actions that must be performed after completing the activities discussed in Section 4 (and possibly 5). It includes the following topics:

6.1 Record a Master Schedule

6.2 Add a Blank Template

6.3 Add a Template Based on another Template

6.4 Copy a Column

6.5 Copy a Template

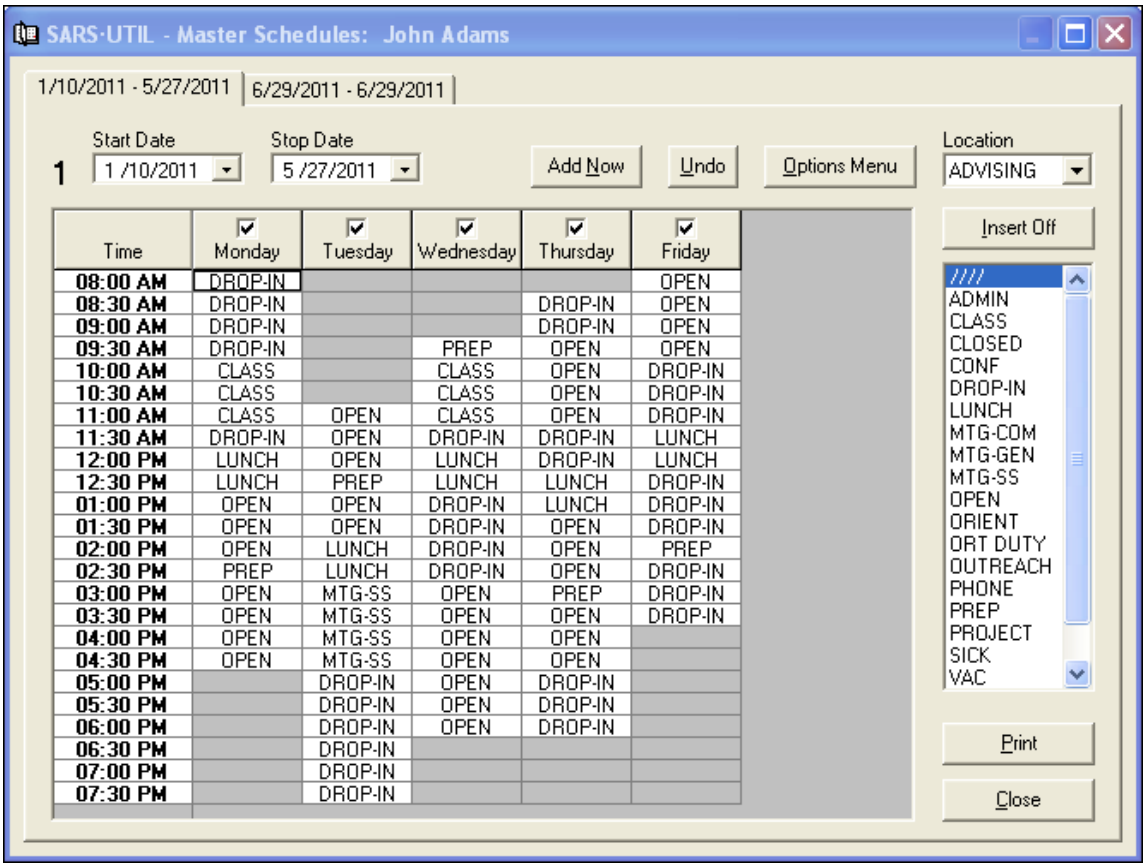
6.6 Reset a Template

6.7 Reset a Column

6.8 Delete a Template

A Master Schedule holds an advisor's basic weekly schedule of activities. Recording a Master Schedule refers to the action of entering on a template an individual's activities for one week. Master Schedules will display only Monday through Friday, unless the option to Include Saturday/Sunday has been selected for this Location.

An example of the MASTER SCHEDULE screen is shown on the next page.



The options are:

- START DATE: Use to establish or change the first date of a work schedule.
- STOP DATE: Use to establish or change the last date of a work schedule.
- ADD NOW: Use to add the work schedule that is currently being viewed to THE GRID immediately.
- UNDO: Use to restore the values in all cells on the template to that which was displayed upon entering the screen. (The UNDO feature does not work with any of the functions on the Options menu.)
- OPTIONS MENU: Use to display a list for selecting various template and column operations.
- LOCATION: Use to select the Location where the individual will be working.
- INSERT OFF/ON: This is a toggle button. When the button reads “Insert On,” clicking on a cell will copy the selected Schedule Code and any corresponding comments into that cell. When the button reads “Insert Off,” the Insert function is disabled.
- PRINT: Use to print the work schedule that is displayed on the screen.
- CLOSE: Use to save the MASTER SCHEDULE and exit the screen.

Note
Look at the checkboxes that are located above each day of the week. The system defaults to all dates being checked. If the advisor does not have a schedule for a particular day of the week (e.g., adjunct advisors), uncheck the box for that day. Only those days that are checked will be added to THE GRID for that advisor. These checkboxes will be used when it is time to add a Master Schedule to THE GRID.

This Section also discusses how to add to THE GRID, which refers to the action of replicating that Master Schedule across a designated date range (for example, one semester) and placing the entire schedule on the scheduling screen.

6.1 Record a Master Schedule

This section introduces the basic method for recording a Master Schedule. Master Schedules will display only Monday through Friday, unless the option to Include Saturday/Sunday has been selected for this Location.

Start to record a new Master Schedule by following the steps below:

1. <u>If you are a System Administrator or a Scheduler</u>:

   a. Click on UTIL on the SARS·MENU.

   b. Click on SYSTEM ADMINISTRATION.

   c. Click on SHORT NAME MAINTENANCE.

   d. Click on the selected advisor's name.

   e. Click on MASTER SCHEDULES to display a template for recording a basic schedule. Initially, all of the cells will contain the Default Master Schedule Code (e.g., ////). A box listing Schedule Codes will appear in the right-hand column.

   f. Proceed to step 3.

2. <u>If you are an Advisor</u>:

   a. Click on UTIL on the SARS·MENU. The Master Schedule screen will display a template for recording your basic schedule. Initially, all of the cells will contain the Default Master Schedule Code (e.g., ////). A box listing Schedule Codes will appear in the right-hand column.

   b. Proceed to step 3.

   Note
   Master Schedules will always display Template # 1 even if there are multiple templates. You may create up to ten templates per advisor per Location.

3. Click on LOCATION ▼ and select the Location for which this schedule will be created. All of the Locations to which the individual has been assigned, and to which the user who is creating the Master Schedule has been assigned access, will be made available on the list, in alphabetical order.

4. Click on the field below START DATE and type over the existing date with the first date of the advisor's Master Schedule, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

Notes
Each subsequent template, when created, will contain a Start Date and Stop Date that begins one day after the Stop Date of the previous template.

To view the day of the week for the Start Date or the Stop Date, rest the cursor on the field.

5. Click on the field below STOP DATE and type over the existing date with the last date of the Master Schedule, or click on ▼ to use the Date Picker. (See "Date Picker" at Appendix B) Typically the STOP DATE is the end of the term. The field will accept up to 10 characters.

6. Click on INSERT OFF. The button will change to INSERT ON. This will make the Schedule Codes on the list available for copying to the schedule.

7. Click on the selected SCHEDULE CODE using the left mouse button.

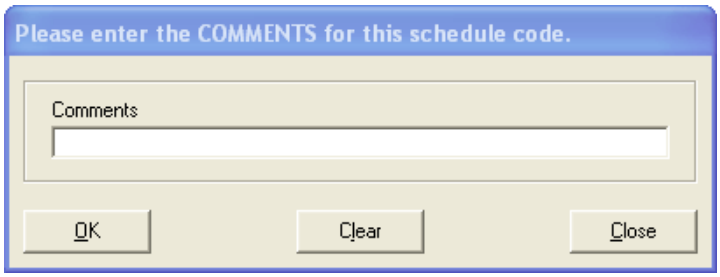
8. Click on the cell on the Master Schedule that is to receive the selected Schedule Code. The code will appear in the cell.

Notes
Schedule Codes that have a longer duration than the default duration will fill the number of cells necessary to cover that duration. If a Schedule Code with a longer duration is overridden by a Schedule Code with a shorter duration, the remaining cells will revert to the Default Master Schedule Code.

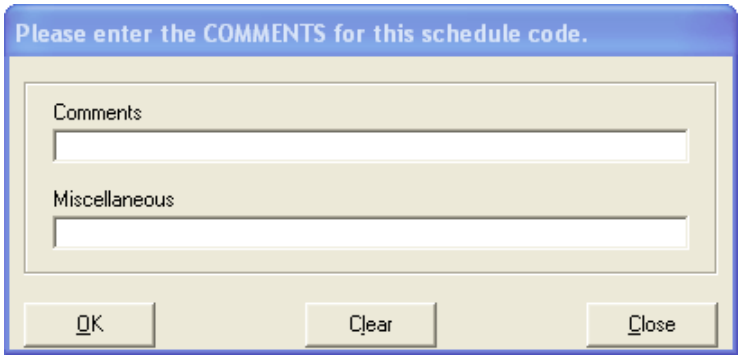
To correct any errors when placing Schedule Codes in cells, simply click on the replacement Schedule Code in the right hand column and click on the cell to be corrected. To restore the template to the values that were displayed upon entering the screen, click on UNDO. (The UNDO feature does not work with any of the functions on the Options menu.)

9. The same Schedule Code may be inserted in other cells either by clicking on one cell after another, or by alternately tapping the down arrow and then tapping the **F4** key or by lassoing a group of cells to receive a selected Schedule Code by holding down the left-click cursor while dragging the cursor across and down all cells to receive the code. When the cursor is released, the new Schedule Code will automatically be placed in all cells that were lassoed in one move.

10. To record information in addition to the Schedule Code, press the right mouse button after inserting the Schedule Code in the first cell for the activity. One of the following screens will appear:



or



a. In the COMMENTS field, type the comment describing the activity in the space provided, which will allow up to 255 characters. Information entered in the Comments field, such as the specific description of the activity and the room number, will be displayed on MY GRID, the ROSTER REPORT, and the DAILY REPORT (landscape version).

Note
Comments are associated with the specific activity denoted by the cell, not with a Schedule Code. This allows you to record different comments while using the same Schedule Code. For example, you may record Staff Meeting as the comment for one cell and Academic Senate Meeting for another. Both cells would display the same Schedule Code of MTG.

b. If a MISCELLANEOUS field is displayed, type any miscellaneous information, such as time and attendance data, in the space provided.

c. Click on OK.

Warning
Before reviewing comments that have already been entered for a cell, click on the button that reads INSERT ON to change it to read INSERT OFF. Otherwise, the previously entered comments may be erased.

d. To duplicate both the Schedule Code and the comments in other cells, click on one cell after another or press **F4** as you move from cell to cell.

Tip
To immediately use the same Schedule Code for which the comments are no longer applicable, clicking on that code again will re-set the Comments field.

11. Repeat steps # 7 - 10 as necessary for other Schedule Codes.

12. To print a copy of the master schedule shown on the screen, click on PRINT.

13. Click on CLOSE to save the Master Schedule.

14. To continue entering schedule data for another advisor, repeat steps # 3-10 for another advisor.

15. When done, click on CLOSE.

Notes
To add the schedules to THE GRID, see Part II, Section 7.1, "Add Schedules to THE GRID". If the user does not have access rights to add master schedules to THE GRID, the ADD NOW button will be disabled.

When re-adding a master schedule, existing appointments will be retained. Also, any Schedule Codes that have been marked with the PREVENT MASTER SCHEDULE OVERWRITE designation will be retained. (See Section 4.4.2, "Schedule Code Properties" in Part I)

6.2 Add a Blank Template

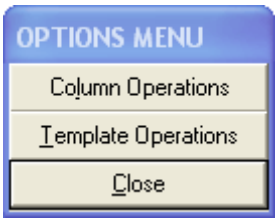
The Add function is used to create new templates for entering additional Master Schedules. It may be desirable to retain templates that have been created if they will be useful at other times.

Adding a new template enables the user to create different schedules for an advisor for a part of a term or for different terms without overwriting the original schedules. Up to ten templates may be added for each individual per Location.

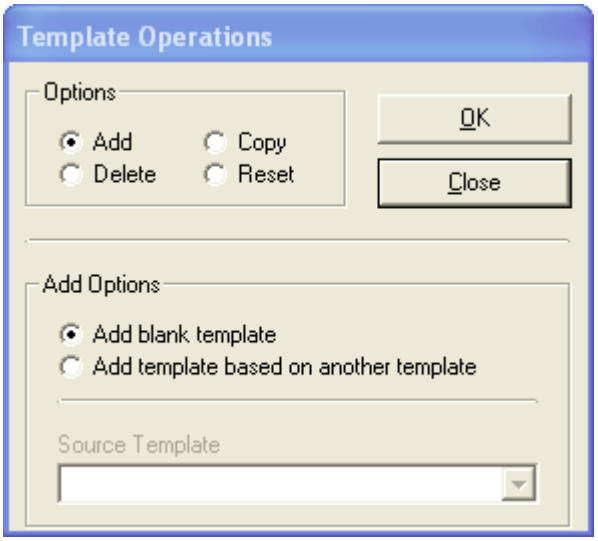
1. Navigate to the Master Schedule Screen.

2. Click on LOCATION ▼ and select the Location for which this schedule will be created.

3. Click on OPTIONS MENU. The following screen will appear:



4. Click on TEMPLATE OPERATIONS. The Template Operations screen will display two add options, as follows.



5. ADD BLANK TEMPLATE is already selected. Click on OK.

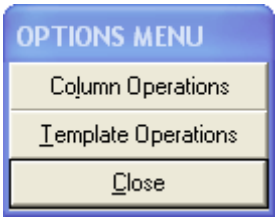
6. Proceed to record a new schedule on the template. (See Section 6.1, “Record a Master Schedule” in this Part)

6.3 Add a Template Based on another Template

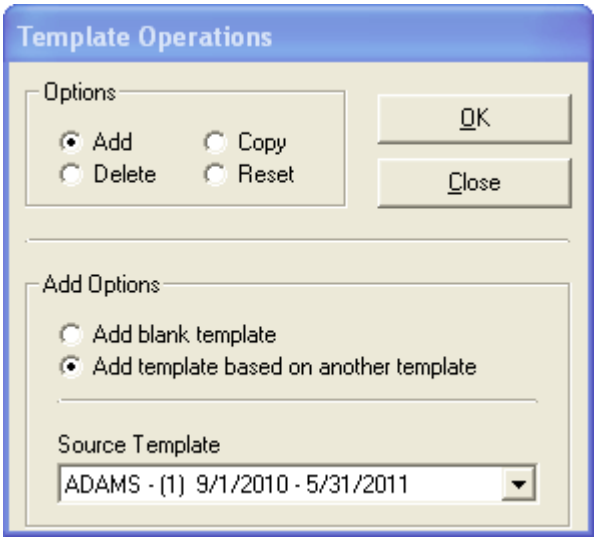
1. Navigate to the Master Schedule Screen.

2. Click on LOCATION ▼ and select the Location in which the template to be used is stored.

3. Click on the OPTIONS MENU. The following screen will appear:



4. Click on TEMPLATE OPERATIONS. The Template Operations screen will display two add options. Here is an example:



5. Click on ADD TEMPLATE BASED ON ANOTHER TEMPLATE.

6. Click on SOURCE TEMPLATE ▼ to display a list of templates for this advisor and all other advisors in the Location and then click on the template to be duplicated.

7. Click on OK. The new template with the duplicated Master Schedule will be displayed.

Note Any comments associated with Schedule Codes will be transferred to the new template, if the template is for the same advisor. Otherwise, comments will not be transferred.

8. Proceed to make any needed modifications to the schedule. (See Section 6.1, “Record a Master Schedule” in this Part)

Tip If ADD TEMPLATE BASED ON ANOTHER TEMPLATE is used for a newly-added advisor, that template will be created as a second template. A blank template will still exist as template #1 for the new advisor. After the new template is created for the advisor, you may wish to delete the blank template.

6.4 Copy a Column

The Copy function is used to select an existing template or column and insert its data into the template or column that is being recorded. Templates or columns may be copied only for the same advisor. They cannot be copied from one advisor's schedule to another.

Copying a column is useful when an advisor's schedule is the same on more than one day of the week. Rather than manually entering the schedule for each similar day, enter a schedule for one day (e.g. Monday) and then copy it to other columns (e.g. Wednesday and Friday). The Copy function eliminates the need to make duplicative entries.

1. Navigate to the Master Schedule screen.

2. Click on the desired Short Name.

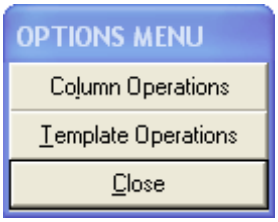
3. Click on LOCATION ▼ and select the Location containing the template for which a column will be copied.

4. Select the desired template by clicking on its tab at the top of the Master Schedule screen. (If the tab is not visible, scroll to view the remaining tabs.)

5. Place the cursor anywhere in the column containing the information to be copied.

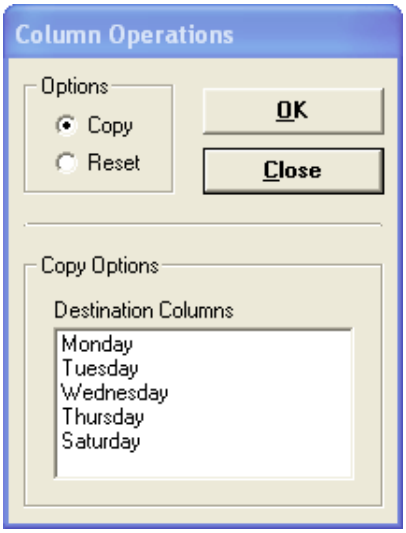
Note
If the focus of the cursor is not already placed in the source column, first click on the button that reads "Insert On" to change it to read "Insert Off." Then it will be safe to place the focus in the column without inadvertently inserting a new Schedule Code.

6. Click on OPTIONS MENU. The following screen will be displayed:



7. Click on COLUMN OPERATIONS.

COPY is already selected as shown on the following screen:



8. DESTINATION COLUMNS displays all the days of the week into which the column may be copied. Notice that the day of the week of the source column is not displayed. Click on one or more day(s).

9. Click on OK. A confirmation message will be displayed.

10. Click on YES. The column(s) will contain the copied information.

11. Proceed to make any needed modifications or to complete the schedule. (See Section 6.1, "Record a Master Schedule" in this Part)

6.5 Copy a Template

Copying a template is similar to ADD A TEMPLATE BASED ON ANOTHER TEMPLATE, but it overwrites an existing (out of date) template with a schedule from another template. This option is available only if two or more templates exist for the individual.

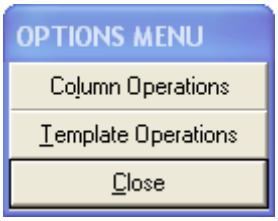
1. Navigate to the Master Schedule screen.

2. Click on the desired Short Name.

3. Click on LOCATION ▼ and select the Location for which the other template will be copied.

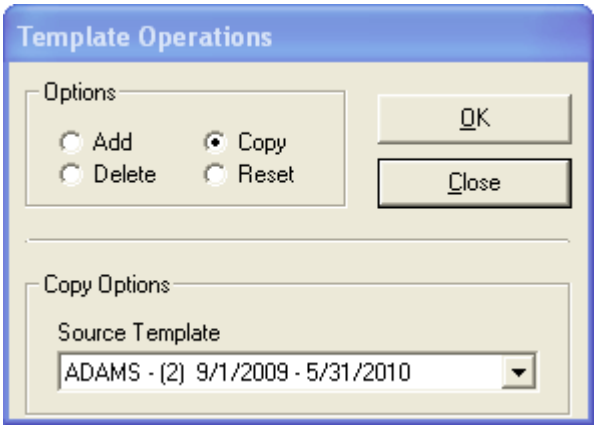
4. Select the template that will receive copied information by clicking on its tab at the top of the Master Schedule screen. (If the tab is not visible, scroll to view the remaining tabs.)

5. Click on OPTIONS MENU. The following screen will appear:



6. Click on TEMPLATE OPERATIONS.

7. Click on COPY. A Source Template field will be enabled in the COPY OPTIONS panel. Here is an example:



8. Click on SOURCE TEMPLATE ▼ to display a list of existing templates for the selected individual, and then select on the template containing the schedule to be copied.

Note For system administrators using this feature, the list of Source Templates will include templates that have been created for other users, as well.

9. Click on OK. A confirmation message will be displayed.

10. Click on YES. The schedule information will have been copied to the template.

Note
Any comments associated with Schedule Codes will be transferred to the new template, if the template is for the same advisor. Otherwise, comments will not be transferred.

11. Proceed to make any needed modifications. (See Section 6.1, "Record a Master Schedule" in this Part.)

6.6 Reset a Template

The Reset function will replace or overwrite the currently used Schedule Codes on the template that is currently in view with the Default Master Schedule Code (e.g., ////).

1. Navigate to the Master Schedule screen.

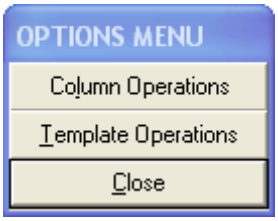
2. Click on the desired Short Name.

3. Click on LOCATION ▼ and select the Location containing the template to be reset.

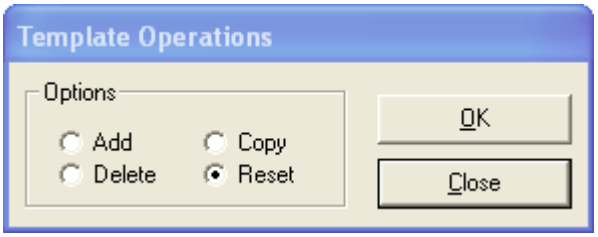
4. Click on the tab of the desired template. (If the tab is not visible, scroll to view the remaining tabs.)

5. Click on OPTIONS MENU.

The following screen will be displayed:



6. Click on TEMPLATE OPERATIONS. Here is an example of the screen:



7. Click on RESET.

8. Click on OK. A confirmation message will be displayed.

9. Click on YES. All of the cells on the template will be restored to the Default Master Schedule Code.

10. Proceed to record a new schedule on the template. (See Section 6.1, "Record a Master Schedule" in this Part)

6.7 Reset a Column

This action will overwrite the existing Schedule Codes with the Default Master Schedule Code in a selected column.

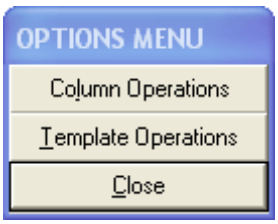
1. Navigate to the Master Schedule screen.

2. Click on the desired Short Name.

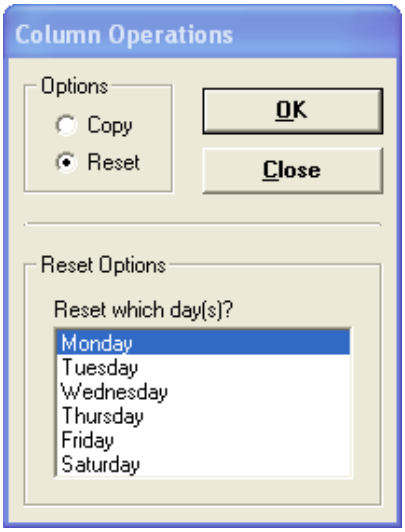
3. Click on LOCATION ▼ and select the Location that contains the template column to be reset.

4. Click on the tab of the desired template. (If the tab is not visible, scroll to view the remaining tabs.)

5. Click on OPTIONS MENU. The following screen will be displayed:



6. Click on COLUMN OPERATIONS. Here is an example:



7. Click on RESET. The RESET OPTIONS panel will display all the work days of the week.

8. Click on the day(s) of the week that represent the column(s) to be reset. More than one column may be selected.

9. Click on OK. A confirmation message will be displayed.

10. Click on YES. All the cells in the selected column(s) will be replaced with the Default Master Schedule Code.

11. Proceed to complete the schedule. (See Section 6.1, "Record a Master Schedule" in this Part)

6.8 Delete a Template

The Delete function is used to eliminate a template that is no longer needed. If only one template exists, this option will be disabled.

1. Navigate to the Master Schedule screen.

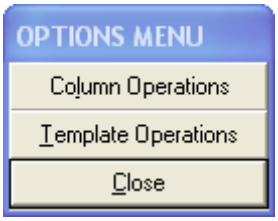
2. Click on the desired Short Name.

3. Click on LOCATION ▼ and select the Location in which the template to be deleted is stored.

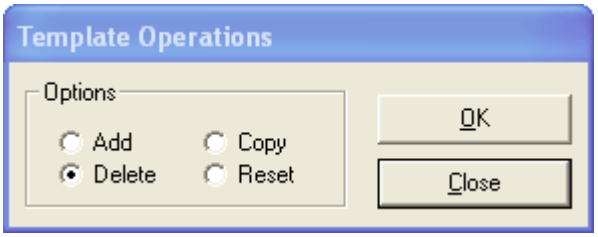
4. Select the template to be deleted by clicking on its tab at the top of the Master Schedule screen. (If the tab is not visible, scroll to view the remaining tabs.)

5. Click on OPTIONS MENU.

The following screen will appear:



6. Click on TEMPLATE OPERATIONS.
7. Click on DELETE. The screen will look like this.



8. Click on OK. A confirmation message will be displayed.
9. Click on YES. Any remaining templates will be renumbered automatically.
10. Click on CLOSE.

SECTION 7 — ADD SCHEDULES TO THE GRID

7.0 Overview

This Section describes those actions that should be performed after completing the activities discussed in Section 6. It includes the following topics:

Before adding a work schedule to THE GRID, be sure that the Excluded Dates for the term have been entered or selected. (See Part I, "Excluded Date Maintenance" at Section 4.11.)

Also, when re-adding a master schedule, be sure that any Schedule Codes that should not be overwritten are properly designated with the PREVENT MASTER SCHEDULE OVERWRITE option. (See "Schedule Code Properties" in this Part, Section 4.4.2.) When in doubt, use QUICK DAY CHANGE from the COMMAND MENU on THE GRID to manually change parts of an advisor's schedule.

7.1 Add a New Schedule

Start to add a new Master Schedule by following the steps below:

1. If you are a System Administrator or a Scheduler:

   a. Click on UTIL on the SARS·MENU.

   b. Click on SYSTEM ADMINISTRATION.

   c. Click on SHORT NAME MAINTENANCE.

   d. Click on the selected advisor's name.

   e. Click on MASTER SCHEDULES to display a template for recording a basic schedule. Initially, all of the cells will contain the Default Master Schedule Code (e.g., ////). A box listing Schedule Codes will appear in the right-hand column.

   f. Proceed to step 3.

2. If you are an Advisor:

   a. Click on UTIL on the SARS·MENU. The Master Schedule screen will display a template for recording your basic schedule. Initially, all of the cells will contain the Default Master Schedule Code (e.g., ////). A box listing Schedule Codes will appear in the right-hand column.

   b. Proceed to step 3.

3. Click on LOCATION ▼ and select the Location.

4. Select the template to be added by clicking on its tab at the top of the Master Schedule screen.

5. Note the checkboxes at the top of each day column. The system defaults to all dates being checked. If the individual does not have a schedule for a particular day of the week (e.g., part-time workers), uncheck the box for that day. Only those days that are checked will be added to THE GRID for that advisor.

6. Click on ADD NOW. A confirmation message will be displayed.

Note
If the intent is to override an existing schedule within the same date range for the selected individual, the program will not permit you to add the schedule if any booked appointments exist. You will need to change the date range to exclude any date for which booked appointments are recorded.

7. Click on YES.

8. The system notifies you of its progress in creating records; when done, a confirmation message will be displayed.

9. Click on OK.

10. Click on CLOSE to exit the Master Schedule screen.

11. Click on CLOSE to exit the SHORT NAME MAINTENANCE screen.

12. Click on EXIT on the SARS·UTIL toolbar.

13. To confirm that the schedule has been added to THE GRID, click on THE GRID or on MY GRID on the SARS·MENU and verify that the advisor's name appears for the date range that was added.

Note
If a master schedule is added while THE GRID is open, the new schedule will not be displayed properly until the user closes down SARS·GRID and then reopens it.

7.1.1 Re-Add a Schedule

When re-adding a master schedule, the following cells will be retained:

- Existing appointments
- Any cells containing Schedule Codes that have been marked with the PREVENT MASTER SCHEDULE OVERWRITE designation

Before starting to re-add a schedule, be sure that any Schedule Codes that should not be overwritten are properly designated with the PREVENT MASTER SCHEDULE OVERWRITE option. (See "Schedule Code Properties" in Part II, Section 4.4.2.)

When in doubt, use QUICK DAY CHANGE from the COMMAND MENU on THE GRID to manually change parts of an advisor's schedule.

When you are sure that the Prevent Master Schedule Overwrite designations are accurate, proceed to re-add a schedule following the steps in Section 7.1, above.

7.2 Add an Occasional Saturday or Sunday

Required Access Permissions:
- ☑ SARS·UTIL – ACCESS
- ☑ SARS·UTIL – MASTER SCHEDULE MAINTENANCE
- ☑ SARS·UTIL – TABLE MAINTENANCE

Occasionally, schools may find the need to add a Saturday or a Sunday to an advisor's schedule to accommodate special situations. Follow the steps below to add an occasional Saturday or Sunday if the Location normally has excluded those days from the schedules.

Generally, this option is performed by the System Administrator.

1. Click on UTIL on the SARS·MENU.
2. Click on SYSTEM ADMINISTRATION.
3. Click on LOCATION MAINTENANCE.
4. Click on the desired Location.
5. Click on PROPERTIES.
6. Click on GRID SETTINGS.
7. Click on Include SATURDAY or SUNDAY.
8. Click on OK to return to the LOCATION MAINTENANCE screen.
9. Click on CLOSE.
10. Click on SYSTEM ADMINISTRATION.
11. Click on SHORT NAME MAINTENANCE.
12. Click on the selected name. (This should be the individual who will be working on the Saturday or Sunday.)
13. Click on MASTER SCHEDULES.
14. Click on LOCATION ▼ and select the Location. Note that a Saturday or Sunday column will be displayed.
15. Click on the OPTIONS MENU.
16. Click on TEMPLATE OPERATIONS. ADD BLANK TEMPLATE is already selected.
17. Click on OK.
18. Enter the same date in START DATE and in STOP DATE that represents the Saturday or Sunday to be added.

Warning!
MAKE THESE THE SAME DATE. If a date range is used, this action will either override existing data or add erroneous data to the individual's Master Schedule.

19. Click on INSERT OFF. The button will change to INSERT ON.

20. Enter the schedule for that date using the same method as that used for recording a master schedule. (See Part II, "Record a Master Schedule," in Section 6.1.)

21. Click on ADD NOW. A confirmation message will be displayed.

22. Click on YES.

23. Click on CLOSE to exit the MASTER SCHEDULE screen.

24. Click on CLOSE to exit the SHORT NAME MAINTENANCE screen.

25. WAIT – you are not done yet. Click on SYSTEM ADMINISTRATION.

26. Click on LOCATION MAINTENANCE.

27. Click on the desired Location.

28. Click on PROPERTIES.

29. Click on GRID SETTINGS.

30. Uncheck INCLUDE SATURDAY or SUNDAY. If this step is not completed, the next time any advisor's schedule is added to THE GRID, it will contain Saturdays or Sundays throughout the entire date range.

31. Click on OK.

32. Click on CLOSE.

SECTION 8 — CHANGE SCHEDULES

8.0 Overview

SARS·GRID offers several methods for changing one or more elements of a schedule from THE GRID. These methods are discussed in the following sections:

8.1 Use QUICK DAY CHANGE to Change One or More Cells

8.2 Change a Single Cell Directly from THE GRID or MY GRID

8.3 Change All or Part of a Column to the Same Schedule Code

8.4 Reset A Column to the Master Schedule

8.5 Lock or Unlock a Column (clearing an advisor's day)

8.6 Delete a Column on THE GRID

8.7 Schedule Recurring Meetings for One Person

8.8 Schedule a Meeting for Several People

8.1 Use Quick Day Change

The QUICK DAY CHANGE option from the Command Menu may be used to change one or more cells of an advisor's schedule after it has been added to THE GRID. It may also be used to enter or change a comment associated with an activity. If selected, an optional column – Miscellaneous – may be used to enter any administrative record keeping information desired by the System Administrator.

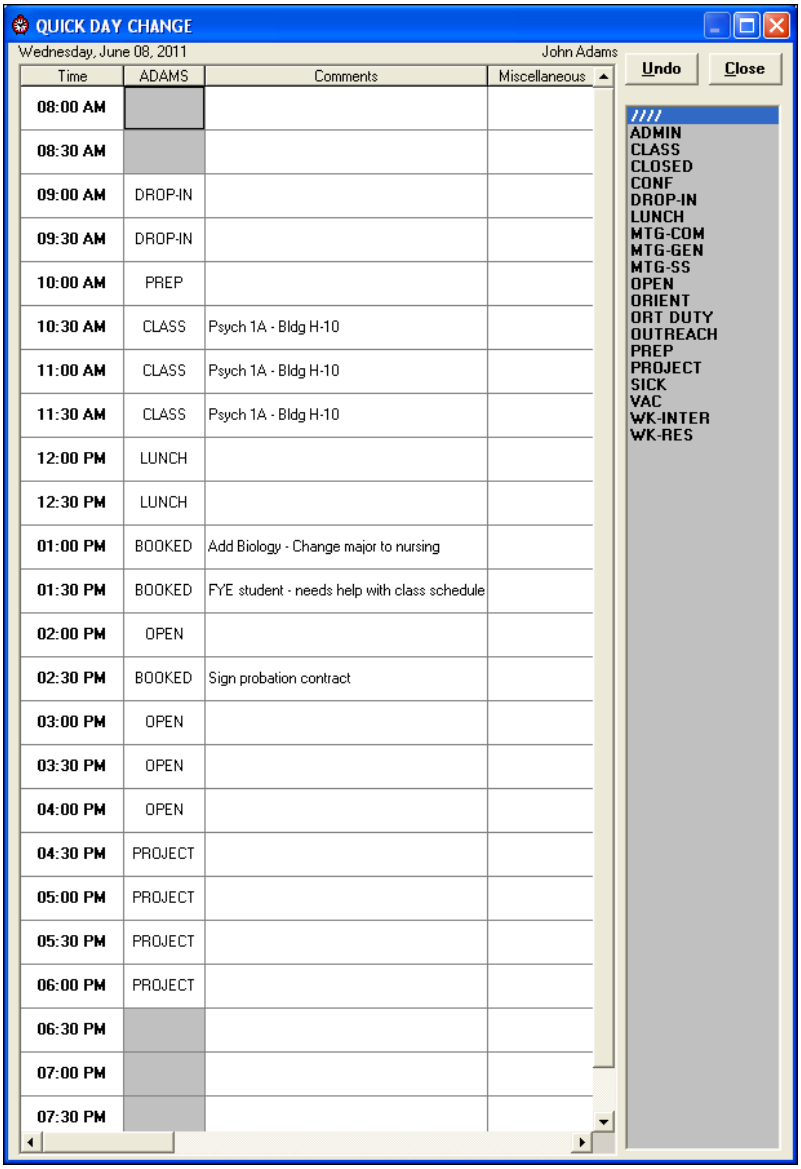
1. On THE GRID or on MY GRID, left-click anywhere within the column that contains the cell or cells to be modified.

   Note
   Be sure that the **focus** is in the correct column.

2. Right-click to display the COMMAND MENU.

3. Left-click on QUICK DAY CHANGE to display the QUICK DAY CHANGE screen. The screen displays a copy of the column along with any corresponding comments that have already been entered and a list of available Schedule Codes.

Here is an example:



The options are:

- COLUMN DISPLAYING CURRENT SCHEDULE: Use to change an advisor's schedule for a selected date by inserting replacement Schedule Codes.
- COMMENTS: Use to enter information that is associated with the activity. This information may be viewed from THE GRID and MY GRID.
- MISCELLANEOUS: Use to enter any administrative record keeping information, such as time and attendance data, that may be viewed only from THE GRID by users with permission to Change Schedule Codes.

- UNDO: Use to restore the values in all cells within the column on the QUICK DAY CHANGE screen to that which was displayed upon entering the screen.

- CLOSE: Use to exit the screen.

Note
To increase the height of the rows, rest the cursor on the top or bottom perimeter of the QUICK DAY CHANGE screen. Left-click and keep the button depressed while moving the mouse up (from the top perimeter) or down (from the bottom perimeter). The re-sized QUICK DAY CHANGE screen will be memorized, and the settings will be displayed during future sessions.

4. Review the list of Schedule Codes in the right-hand column, then left-click on the code representing the advisor's new activity.

5. Left-click on the cell in the column listing the Short Name that is to receive the replacement code. The code will appear in the cell.

Notes
A scheduled appointment must be cancelled or moved before it is replaced by another Schedule Code.

If the replacement code is longer than the standard time slot, the extra time slots linked to the activity will be inserted as well. The replacement code will not be inserted if the total space needed for the extended activity is unavailable because of a pre-existing booked appointment or insufficient time remains at the end of the day.

If the length of the replacement activity is shorter than the length of the existing activity, the replacement code will be inserted only in the cell that is clicked (and any subsequent cells, if the replacement code is longer than the standard time slot). The remaining cells will revert to the Default Master Schedule Code.

6. To record comments about the activity designated by the cell, follow the steps below:

   a. Position the cursor with the focus anywhere on the line in the Comments column.

   b. Right-click to enable the space for typing. (To abort at this point, press ESC.)

   c. Type the specific information about the activity in the space provided, which will allow up to 255 characters.

   d. When done, press ENTER.

7. To enter any private record keeping information, such as time and attendance data, follow the steps below:

   a. Position the cursor with the focus anywhere on the line in the MISCELLANEOUS column.

   b. Right-click to enable the space for typing. (To abort at this point, press ESC.)

   c. Type the specific information about the activity in the space provided, which will allow up to 255 characters.

   d. When done, press ENTER.

8. To duplicate both the Schedule Code and the comments in other cells, click on one cell after another, or alternately tap the down arrow and then tap the **F4** key as you move from cell to cell.

9. Two methods are available to correct an error before exiting the QUICK DAY CHANGE screen, as follows:

   a. To override an incorrect Schedule Code, left-click on the desired Schedule Code and then click on the cell.

   b. To restore an entire column to the values it had before using QUICK DAY CHANGE, click on UNDO.

10. To display another advisor (or day), press **F2** to move to the column of the previous individual (or day) or press **F3** to move to the column of the next individual (or day).

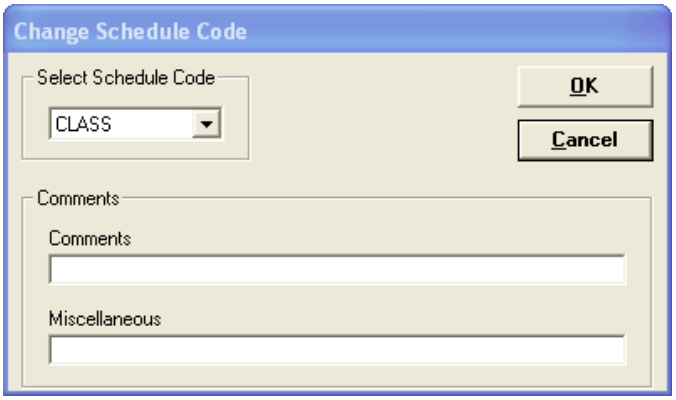
Note
F3 will advance to the next day and the next day, even if the user reaches the end of the current data view.

11. When done, click on CLOSE.

8.2 Change a Single Cell Directly from THE GRID or MY GRID

You may use this option to change a single Schedule Code in any cell that does not contain an available or scheduled appointment (individual or group).

1. On THE GRID or on MY GRID, double-click on the cell that requires a Schedule Code change. The CHANGE SCHEDULE CODE screen will appear. Here is an example of the screen.



Note
If you accidentally double-click on a cell that contains an available or scheduled appointment, the STUDENT APPOINTMENT screen appears rather than the CHANGE SCHEDULE CODE screen. Click on CLOSE and try again.

2. Select the Schedule Code that signifies the new activity.

Note
Schedule Codes that have a longer duration than the default duration will fill the number of cells necessary to cover that duration. If a Schedule Code with a longer duration is overridden by a code with a shorter duration, the remaining cells will revert to the Default Master Schedule Code. The replacement code will not be inserted if the total space needed for the extended activity is unavailable because of a pre-existing booked appointment or insufficient time remains at the end of the day.

3. To enter a corresponding comment for the activity, type any comments in the space provided under Comments, which will allow up to 255 characters

4. If a Miscellaneous column is displayed, type any optional administrative record keeping information in the space provided, which will allow up to 255 characters.

5. Click on OK to approve the change.

6. To change or remove a comment at a later time:

   a. Left-click on the cell to be modified.

   b. Right-click to display the COMMAND MENU.

   c. Left-click on ENTER/CHANGE COMMENTS. The existing comment will be displayed.

   d. To change the comment, modify the text and click on OK.

   e. To remove the comment, click on CLEAR and then click on OK.

8.3 Change All or Part of a Column to the Same Schedule Code

You may use the COMMAND MENU while on THE GRID to change all or part of a column to the same Schedule Code or to change part of a column to the same Schedule Code for a specified time and date range. CHANGE COLUMN functions only if no scheduled appointments are contained in the column to be changed.

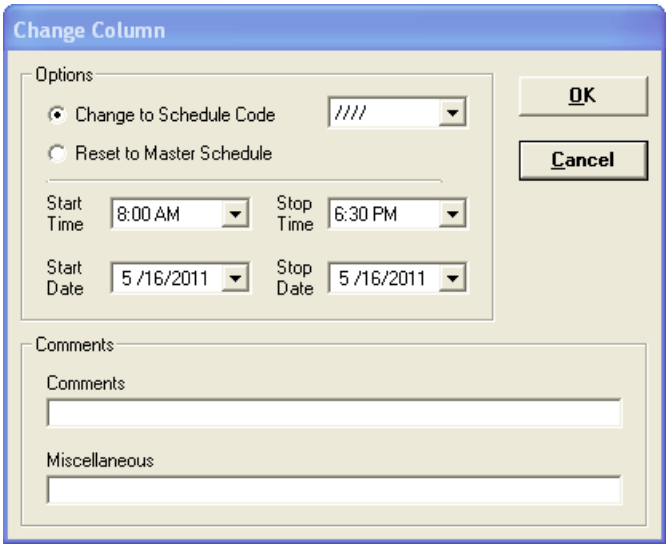
1. On THE GRID or on MY GRID, left-click on any line within the column to be modified.

Note
Be sure that the **focus** is within the column to be changed.

2. Right-click to display the COMMAND MENU.

3. If you have access rights to change a schedule, left-click on CHANGE COLUMN.

A screen, such as the following, will be displayed:



The options are:

- CHANGE TO SCHEDULE CODE: Use to specify that the column will be changed to a Schedule Code, and then to select the Schedule Code to be used.
- RESET TO MASTER SCHEDULE: Use to specify that the column will be reset to the Master Schedule for that day of the week.
- START TIME: Use to select the earliest time for which the column should be changed.
- STOP TIME: Use to select the latest time for which the column should be changed.
- START DATE: Use to specify the earliest date for which the change will be made.
- STOP DATE: Use to specify the last date for which the change will be made.
- COMMENTS: Use to enter any comments to be associated with the Schedule Code.
- MISCELLANEOUS: Use to enter any optional administrative record-keeping information.
- OK: Use to approve the changes.
- CANCEL: Use to exit the Change Column screen without making any changes.

4. Click on CHANGE TO SCHEDULE CODE ▼ and then select the Schedule Code that signifies the advisor's new activity.

Note
Schedule Codes that are longer than the standard time slot will not be available for use.

5. Click on START TIME ▼ and select the first time slot to which the change will apply.

6. Click on STOP TIME ▼ and select the select the last time slot to which the change will apply.

7. Click on the START DATE field and type in the earliest date that should accept the new Schedule Code, or click on ▼ to use the Date Picker. (See "The Date Picker" in Appendix B)

8. Click on the STOP DATE field and type in the last date that should accept the new Schedule Code, or click on ▼ to use the Date Picker.

9. To enter a corresponding comment for the activity, type any comments in the space provided under Comments, which will allow up to 255 characters.

10. If a Miscellaneous column is displayed, type any optional administrative record keeping information in the space provided, which will allow up to 255 characters.

11. Click on OK. A confirmation message will be displayed.

12. Click on YES to confirm the action.

8.4 Reset a Column to the Master Schedule

You may use the COMMAND MENU to reset an entire column of Schedule Codes back to the original codes on the advisor's Master Schedule for that day of the week. CHANGE COLUMN functions only if no scheduled appointments are contained in the column to be changed and only if the date is encompassed on the Master Schedule.

1. On THE GRID or MY GRID, left-click anywhere within the column to be modified.

Note
Be sure that the **focus** is within the column to be changed.

2. Right-click to display the COMMAND MENU.

3. Left-click on CHANGE COLUMN.

4. Click on RESET TO MASTER SCHEDULE.

5. Click on OK. A confirmation message will be displayed.

6. Click on YES to confirm the action.

8.5 Lock or Unlock a Column

You may use the COMMAND MENU to lock or unlock a column. A locked column blocks out an advisor's day so that no appointments may be scheduled for that individual. An unlocked column makes the day available for appointments once more. While the column is locked, only the person who locked it, or a System Administrator with SARS·UTIL – ACCESS and SARS·UTIL

– USER NAME MAINTENANCE access rights, may cancel or reschedule appointments in that column, or unlock the column.

1. To lock a column,

   a. On THE GRID or MY GRID, left-click anywhere within the column to be locked.

   Note
   Be sure that the **focus** is within the column to be locked.

   b. Right-click to display the COMMAND MENU.

   c. Left-click on LOCK COLUMN. A confirmation message will be displayed.

   d. Click on YES.

   Note
   An alternative method for locking a column is to use the Shortcut Key **Alt+L**.

   e. Print the Cancellation/Rescheduling Worksheet for that individual for that date (see "Cancellation/Rescheduling Worksheet" in Part VII, Section 35.4).

   Tip
   The locking mode also may be initiated directly from the Cancellation/ Rescheduling Worksheet setup screen.

   f. After locking the column, you may wish to cancel or move all scheduled appointments for that individual on that date. Then replace all available appointments with Schedule Codes that do not permit appointment scheduling (e.g., SICK).

   Note
   At this point, you may either leave the column locked, or you may unlock it.

2. To Unlock a column,

   a. On THE GRID or on MY GRID, left-click anywhere within the column to be unlocked.

   Note
   Be sure that the **focus** is within the column to be unlocked.

   b. Right-click within the column. A confirmation message will be displayed.

   c. Click on YES. The COMMAND MENU will appear.

   d. Left-click on UNLOCK COLUMN. A confirmation message will appear:

   e. Click on YES. The column will now be available for use by any user with scheduling access rights.

Note
An alternative method for unlocking a column is to use the Shortcut Key **Alt+Y**.

8.6 Delete a Column

You may delete a column only if it does not contain scheduled appointments. You will use this option infrequently.

1. Left-click anywhere within the column to be deleted.

   Note
   Be sure that the **focus** is within the column to be deleted.

2. Right-click to display the COMMAND MENU.

3. Left-click on DELETE COLUMN. A confirmation screen will be displayed.

4. Click on YES to confirm the deletion.

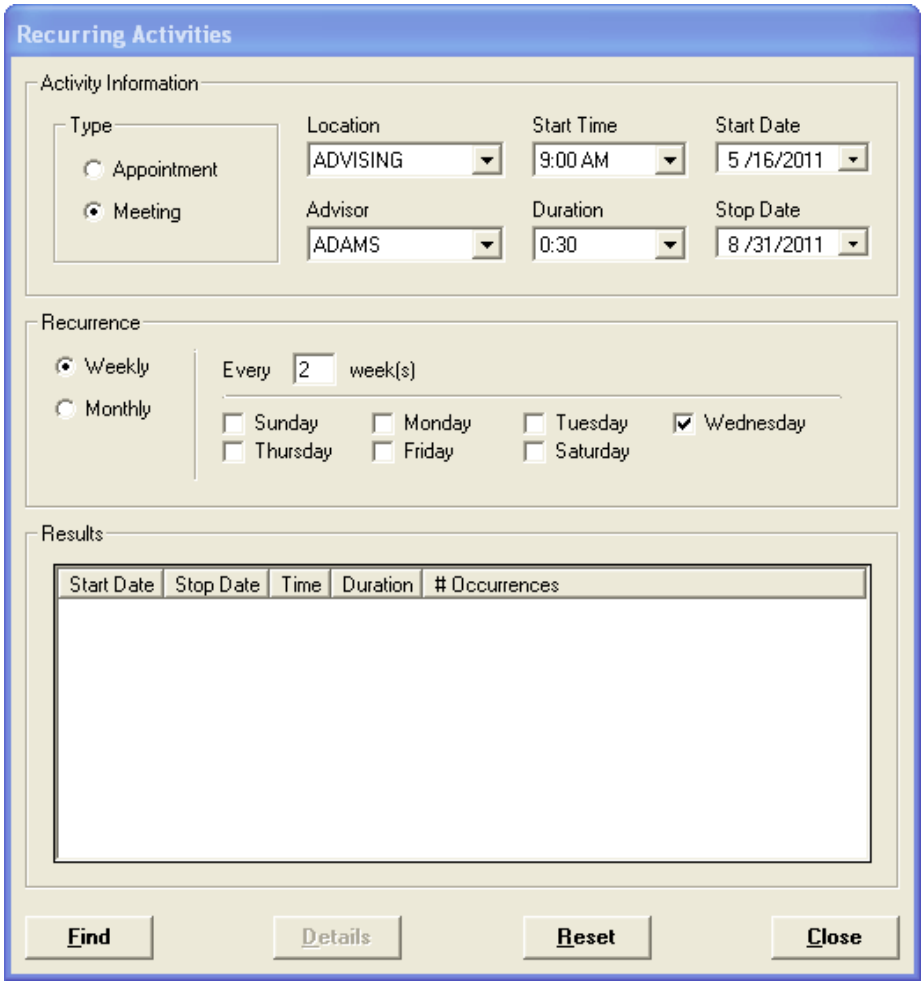
Note
A range of dates for the same individual may be deleted. See Section 4.7.3 in "Advisor Deletions" in Part I.

8.7 Schedule Recurring Meetings for One Person

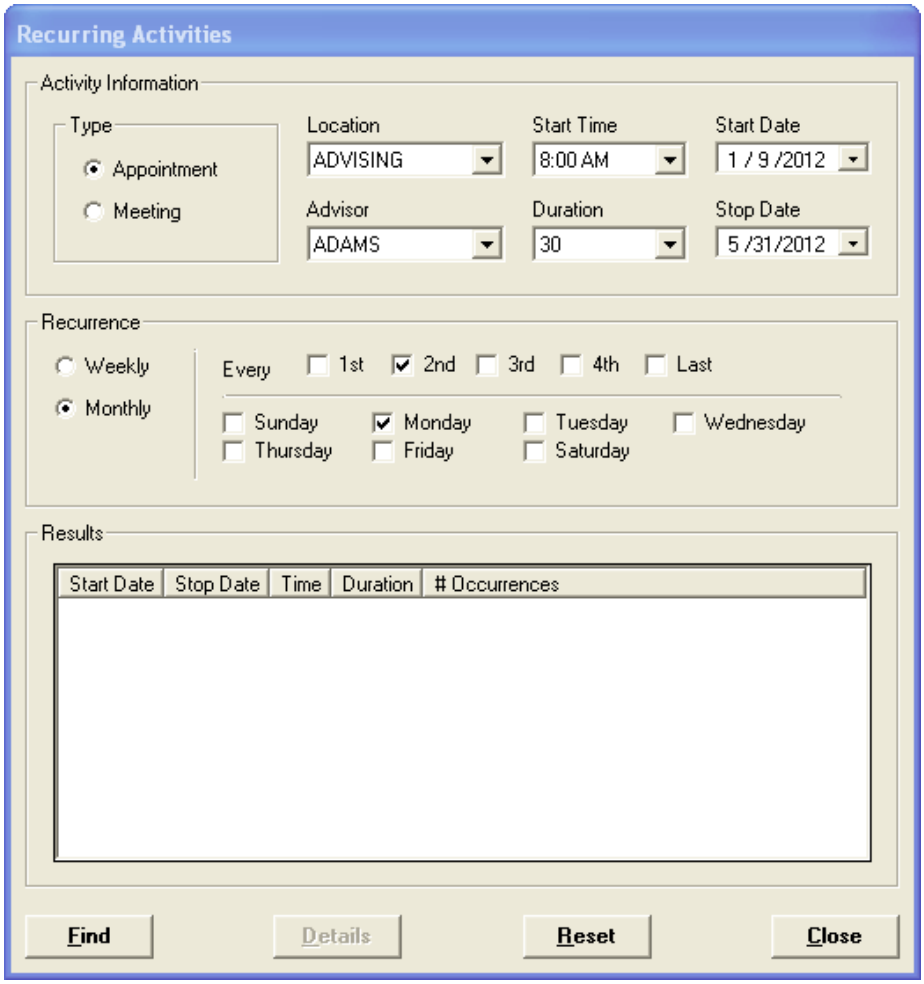
A simple method exists for scheduling multiple, recurring appointments or meetings for one individual at a time. This is accomplished using the RECURRING ACTIVITIES option from the Command Menu.

1. From THE GRID or MY GRID, right click from any cell to display the COMMAND MENU.

2. Click on RECURRING ACTIVITIES to display a RECURRING ACTIVITIES screen. An example of the screen for Weekly Recurrences with Meeting selected follows.



Here is an example of the screen for Monthly Recurrences with Meeting selected:



The options are:

- ACTIVITY INFORMATION:

TYPE - APPOINTMENT:	Use to select the option to schedule a recurring appointment.
TYPE – MEETING:	Use to select the option to schedule a recurring meeting.
LOCATION:	Use to select the Location for which the advisor's schedule is associated.
ADVISOR:	Use to select the individual for whom a recurring appointment or meeting is to be scheduled.
START TIME:	Use to select the time at which the recurring appointment or meeting will begin.
DURATION:	Use to select the length of time needed for the recurring appointment or meeting.

START DATE: Use to select the earliest date for which the recurring appointment or meeting will be scheduled.

STOP DATE: Use to select the latest date for which the recurring appointment or meeting will be scheduled.

- RECURRENCE:

WEEKLY: Use to select the option to schedule a weekly appointment or meeting.

EVERY __ WEEK(S): Use with the WEEKLY option to select the frequency of the weekly appointment or meeting to be scheduled.

MONTHLY: Use to select the option to schedule a monthly appointment or meeting.

EVERY 1st: Use with the MONTHLY option to schedule the appointment or meeting on the first specified day of the month.

EVERY 2nd: Use with the MONTHLY option to schedule the appointment or meeting on the second specified day of the month.

EVERY 3rd: Use with the MONTHLY option to schedule the appointment or meeting on the third specified day of the month.

EVERY 4th: Use with the MONTHLY option to schedule the appointment or meeting on the fourth specified day of the month.

EVERY LAST: Use with the MONTHLY option to schedule the appointment or meeting on the last specified day of the month.

SUNDAY: Use to schedule the appointment or meeting on a Sunday.

MONDAY: Use to schedule the appointment or meeting on a Monday.

TUESDAY: Use to schedule the appointment or meeting on a Tuesday.

WEDNESDAY: Use to schedule the appointment or meeting on a Wednesday.

THURSDAY: Use to schedule the appointment or meeting on a Thursday.

FRIDAY: Use to schedule the appointment or meeting on a Friday.

SATURDAY: Use to schedule the appointment or meeting on a Saturday.

- RESULTS: Used to display those schedules that meet the selected criteria.
- FIND: Use to display results for the selected criteria.
- DETAILS: Use to display all details for a selected result.
- RESET: Use to clear the RECURRENCE panel for new entries.
- CLOSE: Use to exit the screen.

3. In the ACTIVITY INFORMATION panel,

   a. Click on MEETING.

   b. Click on LOCATION ▼ and select the location containing the advisor's schedule to be searched for eligible meeting dates.

   c. Click on ADVISOR ▼ and select the name of the individual for whom the recurring meetings are to be scheduled. This field label is dynamic, so the label may vary depending on the Short Name Label assigned to this Location.

   d. Click on START TIME ▼ and select the time at which the recurring meeting will begin.

   e. Click on DURATION ▼ and select the length of time needed for the meeting.

   f. Click on the START DATE field and type in the first date on which a recurring meeting will be scheduled, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

   g. Click on the STOP DATE field and type in the last date on which a recurring meeting will be scheduled, or click on ▼ to use the Date Picker.

4. In the RECURRENCE panel,

   a. Click on WEEKLY to schedule the meeting on a weekly basis. Then,

      i) Click on EVERY __ WEEK(S) and type in the frequency of the weekly meeting.

      ii) Click on the specific day(s) of the week on which the weekly meeting will be scheduled. More than one day may be selected.

      [**Example**: Selecting **Weekly > Every 2 Weeks > Monday** will return results for every other Monday, starting the next Monday that occurs after today.]

   -or-

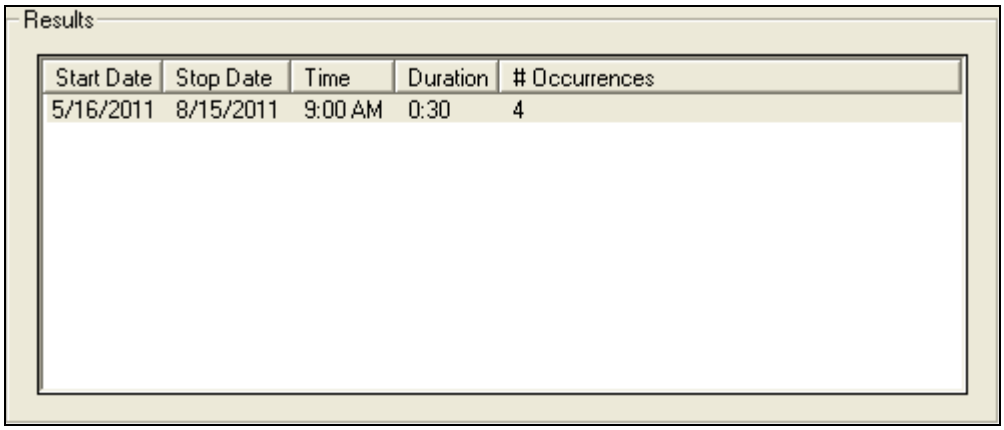
   b. Click on MONTHLY to schedule the meeting on a monthly basis. Then,

      i) Click on 1st, 2nd, 3rd, 4th, or LAST to specify the day of the month the meeting is to be scheduled.

      ii) Click on the specific day(s) of the week on which the monthly meeting will be scheduled. More than one day may be selected.

[**Example**: Selecting **Monthly > 2nd > Monday** will return results for the second Monday of every month, starting the next second Monday.]

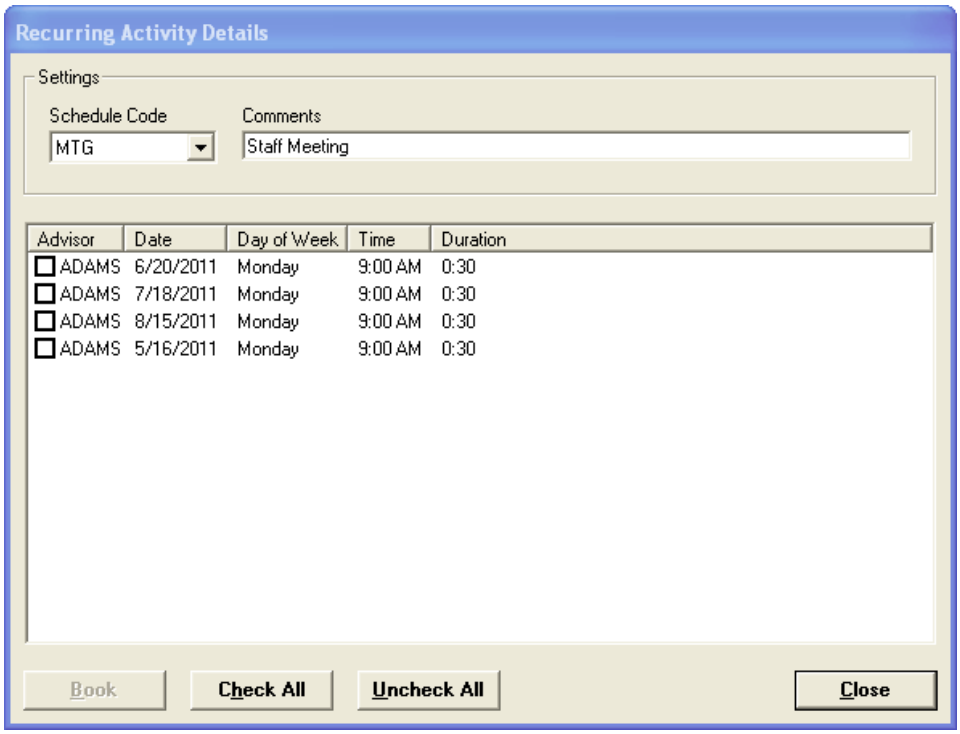
5. Click on FIND. The RESULTS panel will display all possible options. Here is an example:



The Results panel displays the START DATE, STOP DATE, START TIME, DURATION, and the # OCCURRENCES that were found for the selected Advisor and Location.

Note
If a date meeting the specified criteria is unavailable, the system ignores it. Separate results will be returned for date ranges that are broken by an unavailable date.

6. Click on the desired line(s) on the RESULTS panel and then click on DETAILS to display a RECURRING ACTIVITY DETAILS screen. More than one line may be selected by pressing the Control key when clicking. Here is an example:



The options are:

- SCHEDULE CODE: [Enabled only when MEETING is selected.] Use to select the Schedule Code to be used as the replacement code for the recurring meeting (e.g., MTG).
- COMMENTS: [Enabled only when MEETING is selected.] Use to type in relevant comments or a description of the recurring meeting (e.g., Weekly Staff Meeting).
- BOOK: Use to book the selected dates and times.
- CHECK ALL: Use to select all of the dates shown.
- UNCHECK ALL: Use to deselect all of the selected dates.
- CLOSE: Use to exit the screen without completing the booking.

a. Click on SCHEDULE CODE ▼ and select the Code to be inserted on THE GRID to represent the meeting type.

b. Click on the COMMENTS field and type in comments to be associated with the recurring meeting.

c. Review the detailed returns in the data panel. These represent the dates on which a recurring meeting may be scheduled.

d. Click on the desired checkbox(es) to book those dates and times for the recurring meeting.

Hint
Click on CHECK ALL to select all boxes with one click. Click on UNCHECK ALL to deselect all boxes with one click.

e. When all possible dates have been selected for the recurring meeting, click on BOOK. A confirmation message will be displayed.

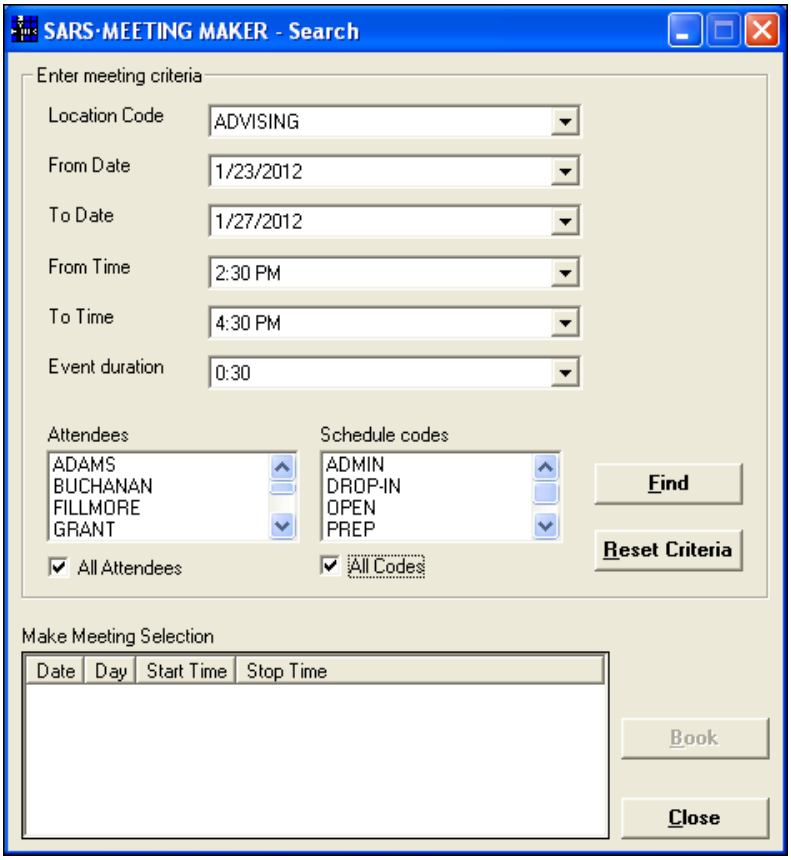
f. Click on YES in response to the confirmation request.

This action reserves the slot(s) on THE GRID for all of the selected dates. The new meeting Schedule Code will be displayed on THE GRID for those dates and times.

8.8 Schedule a Meeting for Several People

Scheduling a meeting for more than one individual entails using the SARS·MEETING MAKER.

Here is an example of the SARS·MEETNG MAKER - SEARCH screen.

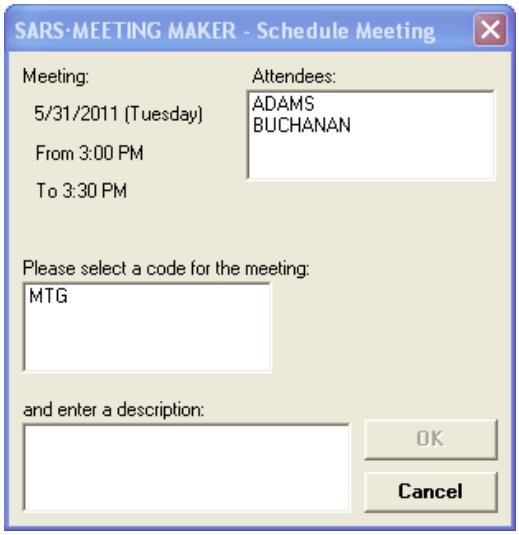


The following options appear on the SEARCH screen:

- LOCATION CODE: Use to select the location for which the meeting will be scheduled.
- FROM DATE: Use to designate the earliest date for which the meeting can be scheduled.
- TO DATE: Use to designate the latest date for which the meeting can be scheduled.
- FROM TIME: Use to designate the earliest time that the meeting can begin.
- TO TIME: Use to designate the <u>start</u> of the latest time slot in which the meeting can end.
- EVENT DURATION: Use to specify the length of the meeting.
- ATTENDEES: Use to select each individual who is to be included in the scheduled meeting.
- ALL ATTENDEES: Use to select all individuals for inclusion in the scheduled meeting.

- SCHEDULE CODES: Use to permit a meeting to replace any of the selected Schedule Codes that appear on the list.
- ALL CODES: Use to permit a meeting to replace any of the listed Schedule Codes.
- FIND: Use to search for selected Schedule Codes for identified attendees to find a common time for a meeting.
- RESET CRITERIA: Use to clear all selections and start over when scheduling a meeting.
- MAKE MEETING SELECTION: Use to select a meeting time and date from among those listed.
- BOOK: Use to schedule a meeting for the date, time and attendees that have been selected.
- CLOSE: Use to exit the screen.

Here is an example of the SCHEDULE MEETING screen.



The following options appear on the SCHEDULE MEETING screen:

- ATTENDEES: Used to select the individuals who will be attending the meeting.
- PLEASE SELECT A CODE FOR THE MEETING: Use to select the code that will be inserted in applicable cells on THE GRID in order to designate a meeting.
- AND ENTER A DESCRIPTION: Use to enter the purpose for the specific meeting.
- OK: Use to approve the selections and entries.
- CANCEL: Use to terminate the action without saving.

Note
Certain Schedule Codes should already have been designated to "Allow Meeting." and other Schedule Codes designated as "Valid Meeting Codes." (See Part I, Section 4.4.2, "Select Schedule Code Properties")

1. Click on MEETING MAKER on the SARS·MENU to display the SARS·MEETING MAKER – SEARCH screen.

2. Click on a selection from LOCATION CODE ▼ to designate the Location for which the meeting is to be scheduled.

3. Click on a selection from FROM DATE ▼ to designate the earliest date for which the meeting can be scheduled.

4. Click on a selection from TO DATE ▼ to designate the latest date for which the meeting can be scheduled.

5. Click on a selection from FROM TIME ▼ to designate the earliest time that the meeting can begin.

6. Click on a selection from TO TIME ▼ to designate the start of the latest time slot in which the meeting can end.

7. Click on a selection from EVENT DURATION ▼ to specify the length of the meeting.

8. Click on the applicable ATTENDEES from the list to select those individuals who are to be included in the scheduled meeting.
   -or-
   Click on the ALL ATTENDEES checkbox to select all individuals for inclusion in the scheduled meeting.

9. Click on those SCHEDULE CODES that may be replaced by a meeting.
   -or-
   Click on the ALL CODES checkbox to permit a meeting to replace all of the listed Schedule Codes.

10. Click on FIND to display a list of times that satisfy the selection criteria.

11. Click on the selected entry from among those listed and then click on BOOK to display the SARS·MEETING MAKER – SCHEDULE MEETING screen. The screen notes the meeting date, day of week, beginning and ending times, and attendees.

12. Click on a SCHEDULE CODE for the meeting.

13. Click on the space provided for in the field labeled AND ENTER A DESCRIPTION and type in information about the meeting. This is a required field.

14. Click on OK. A confirmation message will appear.

15. Click on OK. The previous screen will appear, and the selected meeting code will be inserted in the applicable cells on THE GRID.

16. Click on CLOSE.

SECTION 10 — MY GRID

10.0 Overview

MY GRID is used by advisors to view or print their schedule for a selected date. It is also used to gain access to the NOTEPAD and STUDENT HISTORY, to record appointment attendance, to view or record additional information, alerts and additional student contacts, and to enter or change Reason Codes and Comments.

MY GRID displays an individual advisor's activities, by time, for a single date. If the activity is a booked appointment, the student's name and ID, as well as reasons for the appointment are displayed.

The following features are discussed in this section:

10.1 Configure and Navigate MY GRID

10.2 Use Multiple Dates View

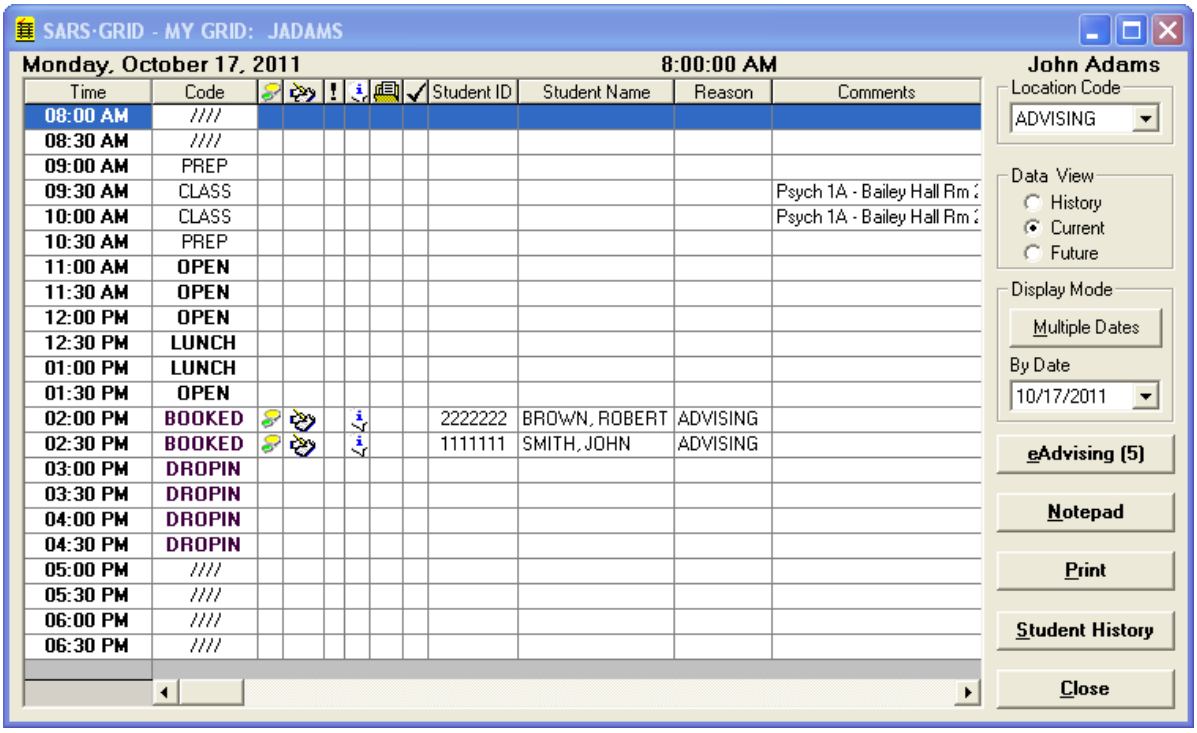
10.3 Refresh MY GRID

10.4 View and Print a Schedule

10.5 Export a Schedule into Microsoft Outlook™

10.6 View a Schedule in Microsoft Outlook™

Here is an example of MY GRID:



The options are:

- LOCATION CODE: Use to display the advisor's schedule for the selected Location.
- DATA VIEW: Use to select that part of MY GRID (HISTORY, CURRENT, OR FUTURE) from which the dates to be displayed are located.
  - HISTORY: Use to access a date that occurs before the first date in the Current Data View.
  - CURRENT: Use to access a date that occurs within the period that is typically available for scheduling functions (for example, one or two weeks).
  - FUTURE: Use to access a date that occurs after the last date in the Current Data View.
- DISPLAY MODE: Use to determine the display format on MY GRID (by Advisor or by date).
  - MULTIPLE DATES: [Available to advisors who have access rights to their own schedules only.] Displays multiple dates on THE GRID.
  - BY ADVISOR: [Available only to administrators or users who have access rights to view all advisors' schedules.] Displays the advisor's Short Name. If enabled, use to select a different individual's schedule to be viewed or printed.
  - BY DATE: Use to select the date to be viewed or printed.
- eADVISING: Use to view a list of unanswered eAdvising questions sent by any student and to reply to or delete a question.
- NOTEPAD: Use to access the on-screen file folder for recording notes about a student.
- PRINT: Use to initiate printing of the advisor's schedule (Daily Report or Snapshot Report).
- STUDENT HISTORY: Use to view the appointment history for a student.
- CLOSE: Use to exit the screen.

MY GRID also has the option to display columns from which more detailed information for a student may be obtained. The columns must be configured using the Configuration screen described in Section 10.1.1, below. The heading icons represent:

 Alerts

 Notes

 Additional Information

 Attendance

 Pull File

TXT Text (student has text cell phone)

 Send Email

 eAdvising

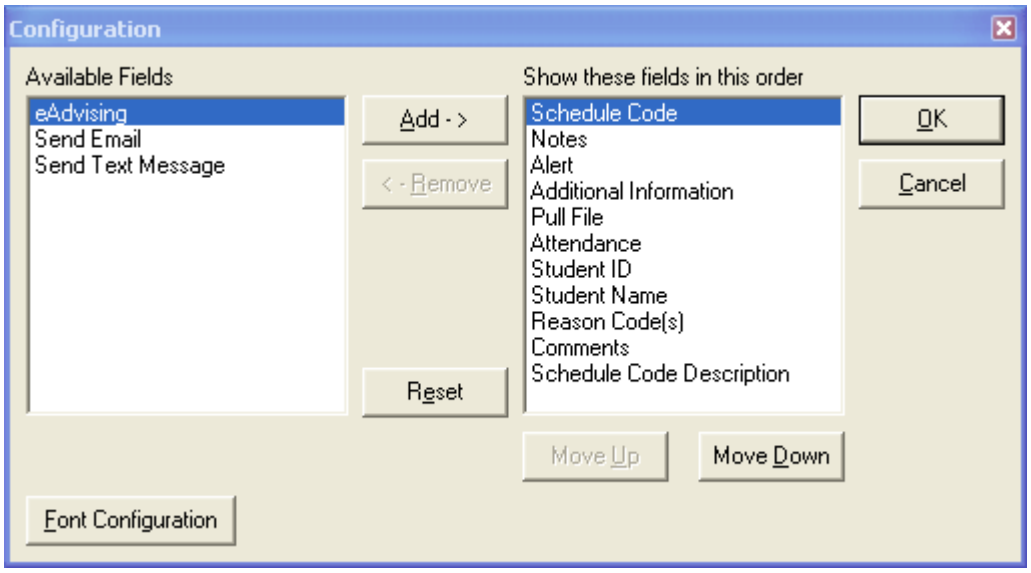
A symbol in any of these columns indicates that an entry has been made for that category for the student.

10.1 Configure and Navigate MY GRID

10.1.1 Configure MY GRID

To configure MY GRID for persons with disabilities, see Appendix C.

1. Click on MY GRID. Your own schedule for today's date will be displayed.
2. Press **F6** to display a CONFIGURATION screen. Here is an example:



The options are:

- AVAILABLE FIELDS: Use to select a field to be displayed on MY GRID.
- ADD ->: Use to move the selected Available fields to the list of fields that will be displayed on MY GRID.

- <- REMOVE: Use to move the selected fields that are on the list of fields to be displayed on MY GRID back to the Available Fields list.
- RESET: Use to restore MY GRID to its former display settings.
- SHOW THESE FIELDS IN THIS ORDER: Used to display the order in which the fields will be displayed on MY GRID.
- MOVE UP: Use to move the selected fields up on the list.
- MOVE DOWN: Use to move the selected fields down on the list.
- FONT CONFIGURATION: Use to display a font Configuration screen that may be used to reconfigure fonts for each field, if the user wishes to have it differ from the fonts used on THE GRID.
- OK: Use to save the selected settings and exit the screen.
- CANCEL: Use to undo the actions taken and exit the screen.

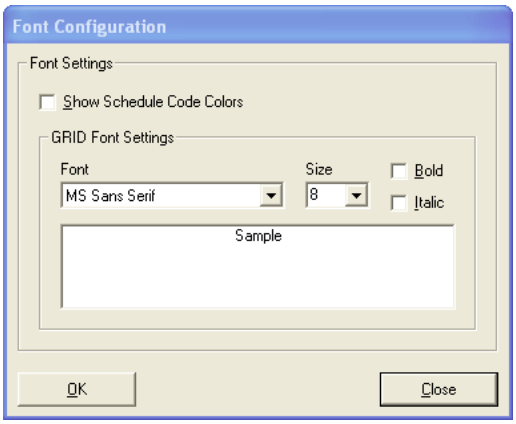
a. If an item is listed in AVAILABLE FIELDS, click on the item and then click on ADD->. It will be moved to the highlighted location on the list in SHOW THESE FIELDS IN THIS ORDER. Repeat this action as desired for other fields to be added.

Note
If the college has a valid license from SARS Software Products, Inc. to use text messages, advisors will be able to configure their MY GRID screens to display a TXT column by selecting SEND TEXT MESSAGE from the Available Fields column. Once the TXT has been made available, advisors will be able to see if the TXT icon is displayed in the column for a student with a booked appointment, and, if so, send a text message to that student.

b. To remove a column, click on the item in the right-hand column; then click on <-REMOVE. The item will be moved to AVAILABLE FIELDS. Repeat this action as desired for other fields to be deleted.

c. To rearrange the order of the columns, click on any item in the list in SHOW THESE FIELDS IN THIS ORDER. Then click on MOVE UP or on MOVE DOWN until the item is in the desired location relative to the other items on the list.

d. The fonts for each field will be the same as they have been configured for THE GRID. To change the font for one or more fields, click on FONT CONFIGURATION. The following screen will be displayed:



The options are:

- SHOW SCHEDULE CODE COLORS: Use to specify that the Schedule Codes should be displayed with their color codes. If this option is selected (the default), the GRID Font Settings options will be disabled.
- FONT: Use to select a different font for the selected field name.
- SIZE: Use to select a different font size for the selected field name.
- BOLD: Use to specify that the font for the select field name should be displayed in Bold Font.
- ITALIC: Use to specify that the font for the select field name should be in Italics.
- SAMPLE: Used to view an example of the selected options.
- OK: Use to save the settings.
- CLOSE: Use to exit the screen.

i) Uncheck SHOW SCHEDULE CODE COLORS. This will enable the other fields on the screen.

ii) Click on FONT ▼ and then select the desired font.

iii) Click on SIZE ▼ and then select the desired size of the font.

iv) Click on BOLD and/or click on ITALIC to have the font displayed in those formats.

v) View the example in the Sample text box.

vi) Click on OK to approve the changes and exit the screen.

e. If necessary, click on RESET to restore MY GRID to its former display settings.

f. When done, click on OK to return to MY GRID.

10.1.2 Navigate MY GRID

1. Click on MY GRID. Your own schedule for today's date will be displayed.

Note
MY GRID may be resized as desired using the standard Windows procedure.

2. To display another date:

   a. Click on BY DATE ▼. A list of dates will appear.

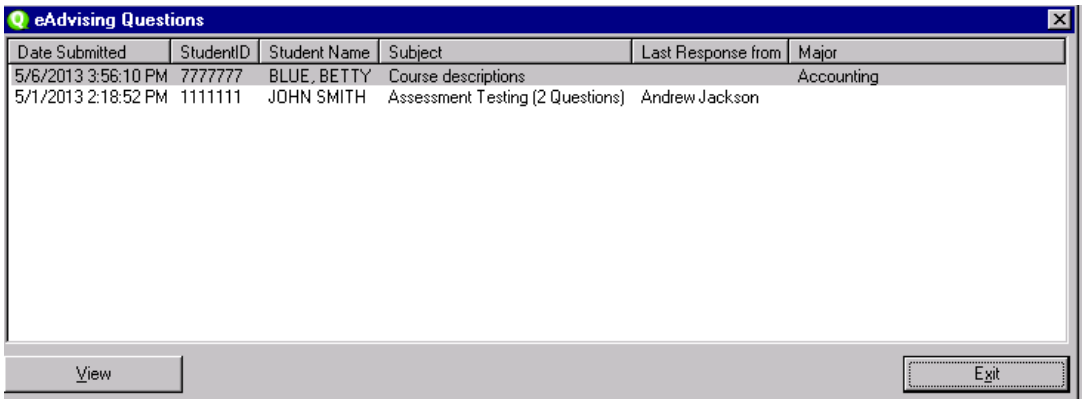
   b. Click on the selected date. If the desired date is not listed, change the DATA VIEW; then select the date.

Tip
To back up MY GRID by one day without using the DISPLAY MODE BY DATE feature, press **F2**. To move MY GRID forward by one day, press **F3**.

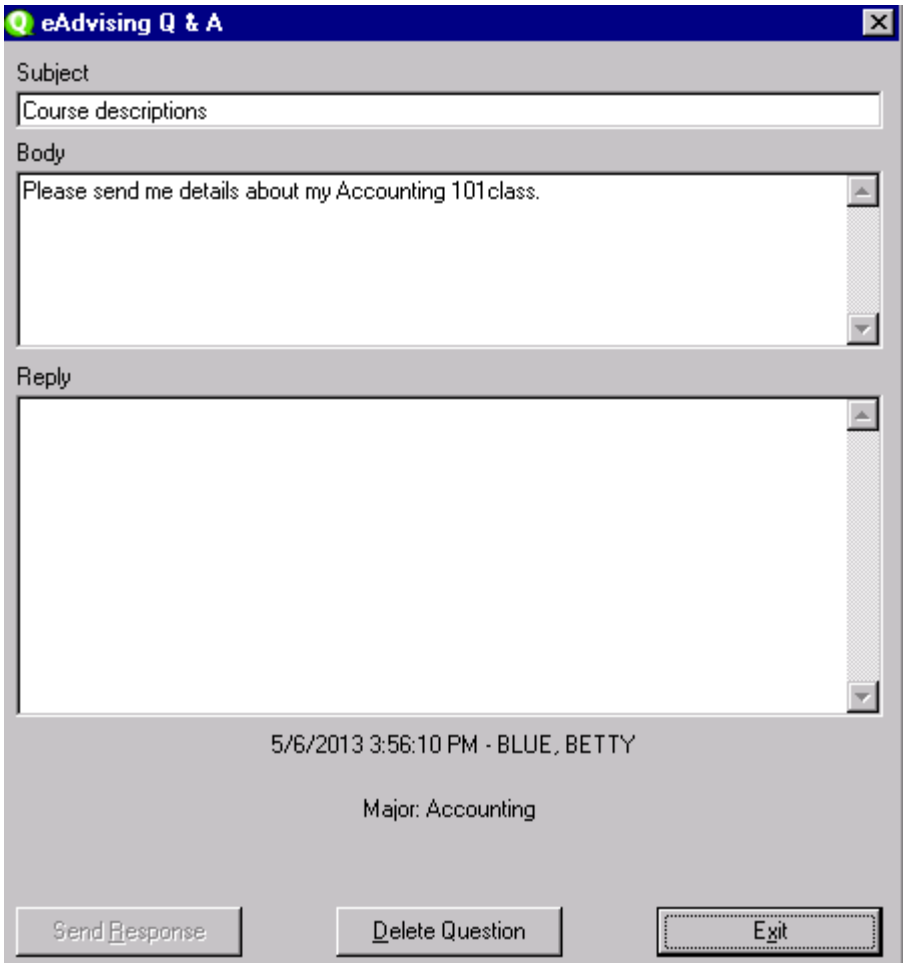
3. To change the DATA VIEW, click on HISTORY, CURRENT, or FUTURE.

Note
Most activities occur in Current Data View. A list of dates that occur outside the date range for Current Data View will appear only to those users with access rights to go to History and/or Future Data View. Access rights are controlled by the System Administrator.

4. To view, reply to, or delete unanswered eAdvising questions sent by students, click on the eADVISING button or press Alt+G. An eADVISING QUESTIONS screen will be displayed listing all unanswered questions from all students in the selected Location. Here is an example:



   a. To view a specific question, click on the line containing the question; then click on VIEW. Here is an example of the eAdvising Q & A screen that will be displayed:



b. Review the contents of the Subject field and the Body field. Also note that the description and selected response for an Additional Information Question will be displayed below the date, time and name of the student.

c. To delete the question, click on DELETE QUESTION. A confirmation screen will be displayed.

   i) Click on YES, or

   ii) Click on NO to return to the previous screen.

d. To answer the question, click on the REPLY field and type in the response. This will activate the SEND RESPONSE button.

   i) Click on SEND RESPONSE. When the response has been successfully sent, a confirmation screen will be displayed:

   ii) Click on OK. You will be returned to the eADVISING QUESTIONS screen.

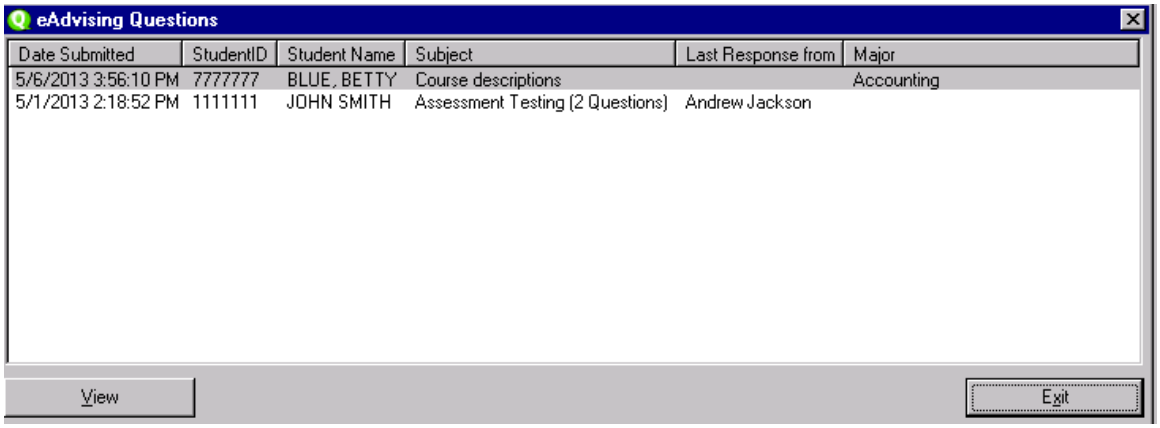
Note
Once an eAdvising question has been answered, it is added to the Notepad as a private note, viewable only by the advisor who answered the question. In addition, eAdvising questions that have been answered will be listed in the All Data format of Student History.

e. Click on EXIT.

5. To view or change information about an existing student appointment, double-click on the row containing the appointment. The STUDENT APPOINTMENT screen will be displayed.

6. To view Alerts, Notes, Additional Information about a student with a booked appointment, or all answered and unanswered eAdvising questions for that student, single left-click on the relevant icon. The information will be displayed in a pop-up screen. If the columns are not displayed, press **F6** to display the Configuration screen and select that option.

7. To view, reply to, or delete an eAdvising question for a student with a booked appointment, single-left-click on the eAdvising icon on the row containing the appointment. An eAdvising Questions screen will be displayed for this student only and additional columns will display the subject, the name of the advisor who last responded, and the description of the Additional Information question. Here is an example:



a. Note whether the question has been answered (Yes or No).

b. Click on the line containing the question to be viewed.

c. Click on VIEW to display the eADVISING Q & A screen.

d. Click on the REPLY field and proceed to compose a response; then click on SEND RESPONSE.

- or -

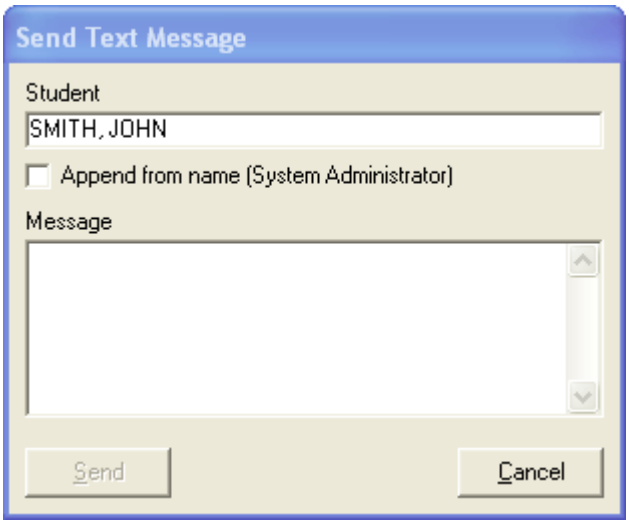
e. Click on DELETE QUESTION.

f. Click on EXIT.

8. To send an email message to a student with a booked appointment, single left-click on the Send Email icon on the row containing the appointment. If the student has an email address in the system as indicated by the presence of the icon, an email screen will be

displayed for completion. If the columns are not displayed, press **F6** to display the Configuration screen and select that option.

9. If an icon appears in the Text column, the student has a text phone. If the college has a valid license for text messaging, advisors will be able to send a text message to a student with a booked appointment. Just left-click on the Send Text Message icon on the row containing the appointment. A SEND TEXT MESSAGE screen will be displayed. Here is an example:



The options are:

- STUDENT: Used to display the name of the student.
- APPEND FROM NAME: Use to specify that the name of the user who is sending the message will be added to the message. (The name that will be displayed is shown in the parentheses.)
- MESSAGE: Use to type in the text message.
- SEND: [Activated when text is entered in the Message field] Use to send the message.
- CANCEL: Use to exit the SEND TEXT MESSAGE screen without sending the message.

a. [Recommended] Click on the checkbox adjacent to APPEND FROM NAME (your name will be listed). This will display your name in the text message.

b. In the MESSAGE textbox, type in your message. This will activate the SEND button.

c. Click on SEND. A message will be displayed stating that the message was sent successfully.

10. To gain access to the COMMAND MENU for performing various actions, right-click anywhere on MY GRID.

11. To re-size the columns, rest the cursor in the header on the vertical line between the columns. Left-click and keep the mouse button depressed while moving the mouse to the

left or right. The re-sized columns will be memorized, and the settings will be displayed during future SARS·GRID sessions

12. To increase the height of the rows, rest the cursor on the top or bottom perimeter of MY GRID. Left-click and keep the button depressed while moving the mouse up (from the top perimeter) or down (from the bottom perimeter). The re-sized MY GRID will be memorized, and the settings will be displayed during future sessions.

Note
At any time while working in MY GRID, advisors may receive a pop-up message about the arrival of a student for an appointment. This event will occur only if Notification of Appointment Arrival has been activated in the individual's Location. For more information about this feature, see "Instant Messaging" in Section 17 in this Part.

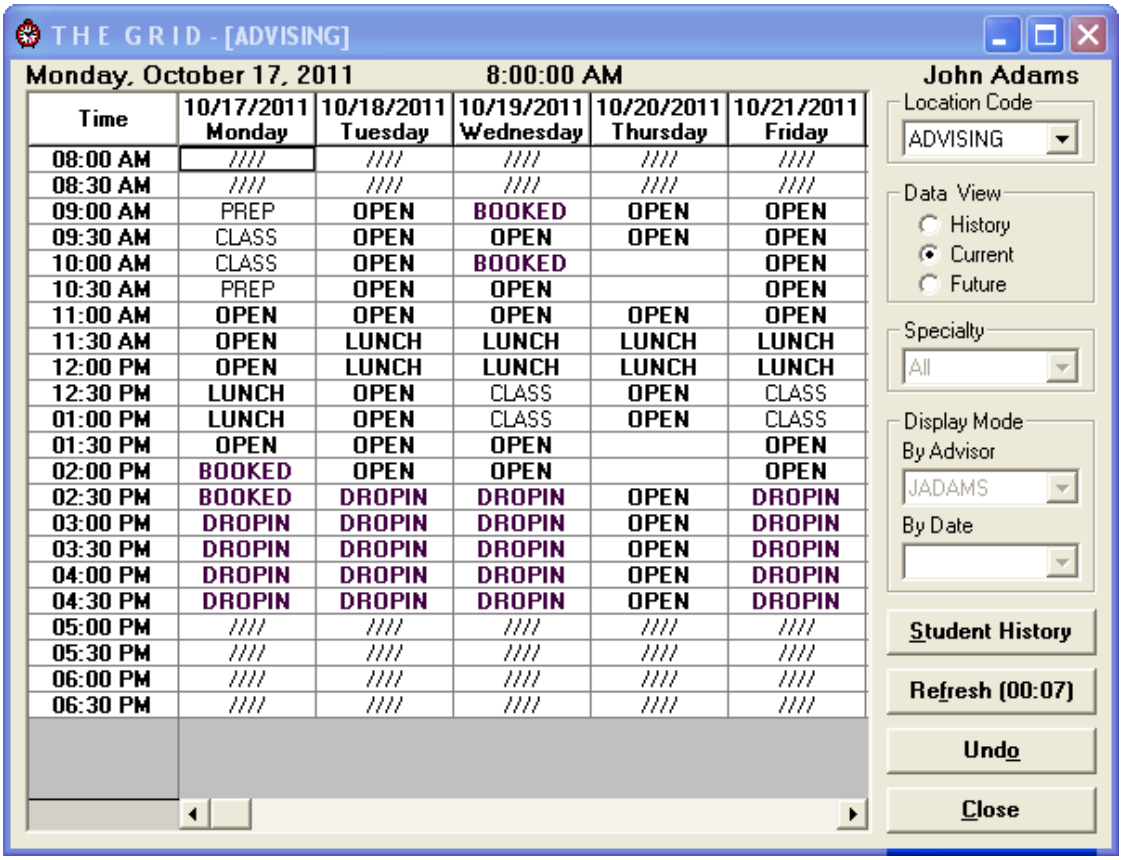
10.2 Use the Multiple Dates View

Advisors who have permission to view only their own schedules may also view their schedules in MULTIPLE DATES mode. While the single day view on MY GRID should be considered "Home Base" for advisors, using the MULTIPLE DATES option affords them an expanded, but less detailed, view of their schedules. Many, though not all, of the functions that are performed on MY GRID may also be performed in the MULTIPLE DATES display mode. A notable exception is the use of the NOTEPAD, which is available only from MY GRID.

If the MULTIPLE DATES button is shown on MY GRID as a DISPLAY MODE option, an advisor has the ability to use this feature by following the steps below:

1. Click on MULTIPLE DATES. THE GRID will be displayed in the BY ADVISOR display mode. The DISPLAY MODE options on this screen are disabled.

Here is an example:



Time	10/17/2011 Monday	10/18/2011 Tuesday	10/19/2011 Wednesday	10/20/2011 Thursday	10/21/2011 Friday
08:00 AM	////	////	////	////	////
08:30 AM	////	////	////	////	////
09:00 AM	PREP	OPEN	BOOKED	OPEN	OPEN
09:30 AM	CLASS	OPEN	OPEN	OPEN	OPEN
10:00 AM	CLASS	OPEN	BOOKED		OPEN
10:30 AM	PREP	OPEN	OPEN		OPEN
11:00 AM	OPEN	OPEN	OPEN	OPEN	OPEN
11:30 AM	OPEN	LUNCH	LUNCH	LUNCH	LUNCH
12:00 PM	OPEN	LUNCH	LUNCH	LUNCH	LUNCH
12:30 PM	LUNCH	OPEN	CLASS	OPEN	CLASS
01:00 PM	LUNCH	OPEN	CLASS	OPEN	CLASS
01:30 PM	OPEN	OPEN	OPEN		OPEN
02:00 PM	BOOKED	OPEN	OPEN		OPEN
02:30 PM	BOOKED	DROPIN	DROPIN	OPEN	DROPIN
03:00 PM	DROPIN	DROPIN	DROPIN	OPEN	DROPIN
03:30 PM	DROPIN	DROPIN	DROPIN	OPEN	DROPIN
04:00 PM	DROPIN	DROPIN	DROPIN	OPEN	DROPIN
04:30 PM	DROPIN	DROPIN	DROPIN	OPEN	DROPIN
05:00 PM	////	////	////	////	////
05:30 PM	////	////	////	////	////
06:00 PM	////	////	////	////	////
06:30 PM	////	////	////	////	////

Note
The eAdvising button is not available in the Multiple Dates View.

2. To select a date that is not displayed in the current date range on THE GRID, click on FUTURE to find dates that extend beyond the current date range, or click on HISTORY to find dates that are in the past.

   a. To move to the next or previous group of dates, click on >> (next) or << (previous) at the bottom of THE GRID. THE GRID will display the next (or previous) set of dates based on the data view size settings for those Views.

   -or-

   b. Select a specific date by clicking on the “jump button” at the bottom of THE GRID and select the desired date.

3. To view or modify the comments about an activity:

   a. Click on the cell.

   b. Right-click to display the COMMAND MENU.

   c. Click on ENTER/CHANGE COMMENTS.

   d. Proceed with the action.

4. To re-size the columns on THE GRID:

   a. Rest the cursor in the header on the vertical line between the columns.

   b. Left-click and keep the mouse button depressed while moving the mouse to the left or right. The re-sized columns will be memorized, and the settings will be displayed during future sessions.

5. To change a schedule using the COMMAND MENU:

   a. Left-click to place the focus on the desired cell.

   Warning
   Failure to properly click on the desired cell will result in the action being taken for the incorrect cell.

   b. Right-click to display the COMMAND MENU.

   c. Left-click on the selected command to initiate the action.

   d. Proceed as you would from MY GRID.

6. To modify or view student-related data using the COMMAND MENU:

   a. Left-click to place the focus on the desired cell.

   b. Right-click to display the COMMAND MENU. (Options may include: Additional Information, Address Info, and Alert.)

   c. Left-click on the selected command to initiate the action.

   d. Proceed as you would from MY GRID.

7. To perform appointment-related actions using the COMMAND MENU:

   a. Left-click to place the focus on the desired cell.

   b. Right-click to display the COMMAND MENU.

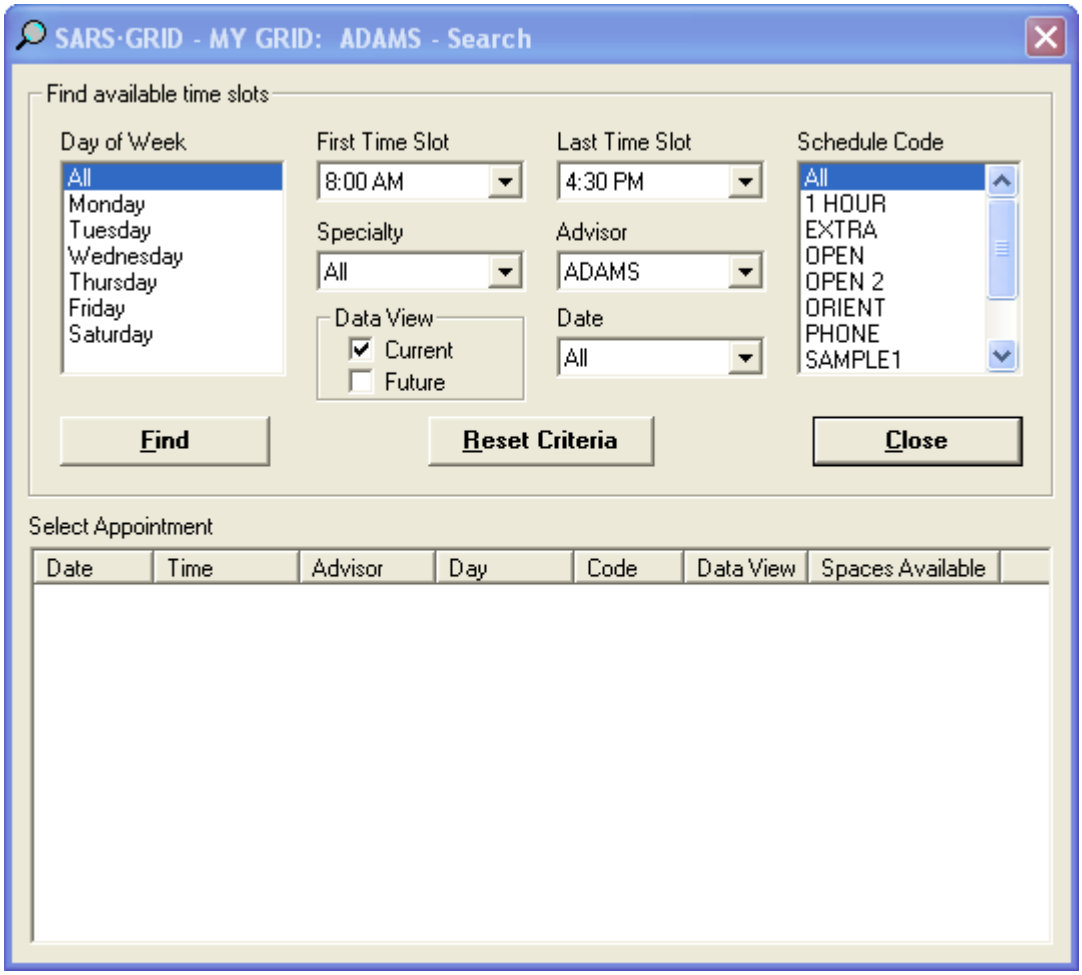
   c. Left-click on the selected command to initiate the action.

   d. Proceed as you would from MY GRID.

8. To search for an available appointment slot:

   a. Right-click to display the COMMAND MENU.

   b. Click on SEARCH FOR APPOINTMENT. A screen will appear that looks like this:



c. Click on one or more days, or on ALL, in DAY OF WEEK.

-or-

Click on DATE ▼ and select the specific date that the student requests.

d. Click on FIRST TIME SLOT ▼ and select the earliest time slot that the student wishes an appointment to begin.

e. Click on LAST TIME SLOT ▼ and select the latest time slot that the student requests an appointment to begin.

f. [Optional] Click on SPECIALTY ▼ and select the desired specialty group (e.g., Spanish-speaking) to limit the choices to that group.

g. Click on ADVISOR ▼ and select the desired advisor.

h. In the DATA VIEW, panel click on CURRENT to search for appointments in the Current Date View or click on FUTURE to search for appointments in the future Data View, or click on both to expand the search.

Note
Selecting both CURRENT and FUTURE will display all available appointments in the CURRENT DATA VIEW plus up to 100 additional appointment slots in the FUTURE DATA VIEW.

i. Click on one or more Schedule Codes, or on ALL, in the SCHEDULES CODES field to search for the desired appointment allowable slots. For individual appointments, only available slots will be displayed.

Note
If the Schedule Code is for a group activity, all such slots and the number of openings will be displayed.

j. Click on FIND to display a list of available appointments that will satisfy the selection criteria.

k. Double-click on the selected entry from among those listed. The STUDENT APPOINTMENT screen will appear.

l. Enter the applicable information on the STUDENT APPOINTMENT screen. Click on COMMIT APPOINTMENT. Type your name or initials in response to the prompt and then press ENTER or click on YES to return to the SEARCH screen.

m. Click on CLOSE to exit the SEARCH screen and return to THE GRID, or click on RESET CRITERIA to clear the screen and select other criteria.

9. To bring up the STUDENT APPOINTMENT screen for a booked or available appointment,

   a. Double-click on the desired cell.

   b. Proceed as you would from MY GRID.

10. When done performing actions in the MULTIPLE DATES display mode, click on CLOSE. You will be returned to MY GRID.

10.3 Refresh MY GRID

When in AUTO REFRESH mode, MY GRID will refresh automatically every 30 seconds, unless the screen is inactive or minimized. It is recommended that an additional setting be selected to ensure that updated information will be displayed on MY GRID – the REFRESH WHEN INACTIVE setting (see below). The options for modifying the manner in which MY GRID is updated on individual workstations are described below.

- MINUTES: Use to select the desired refresh option. Three choices are available.

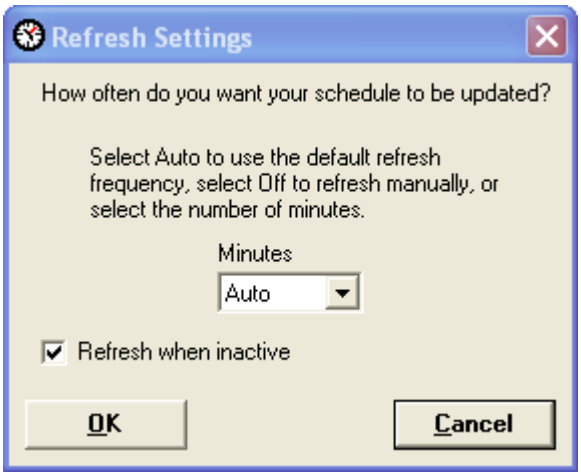
  AUTO: Use to retain the default Auto Refresh frequency (every 30 seconds).

  OFF: Use to turn off the Auto Refresh feature.

  1-30: Use to display a drop-down list from which any number of minutes from 1 – 30 may be selected as the Auto Refresh frequency.

- REFRESH WHEN INACTIVE: Use in combination with AUTO REFRESH to update MY GRID, even when it is minimized or not the active application on the screen. This option is pre-selected as a default setting. [RECOMMENDED]

Advisors can customize the Refresh options on an individual basis by pressing **Alt R** to display the REFRESH SETTINGS screen.



1. From MY GRID, press **Alt R** to display the REFRESH SETTINGS screen.
2. Click on MINUTES ▼ and select one of the following options:
   a. Select AUTO to retain the default Auto Refresh frequency (every 30 seconds).
   b. Select OFF to turn off the Auto Refresh function entirely for this PC.
   c. Select the number of minutes to elapse between screen refreshes, if different from the 30-second default.
3. Note that the REFRESH WHEN INACTIVE checkbox is pre-selected. This option will refresh MY GRID when it is minimized or not the active application. This setting has no effect if AUTO REFRESH is OFF.

Warning
In rare instances when system resources are low, enabling the REFRESH WHEN INACTIVE option may cause your PC to run slowly. If this is the case, uncheck the REFRESH WHEN INACTIVE option.

4. Click on OK.

10.4 View and Print a Schedule

MY GRID always defaults to today's date. Typically, individuals are permitted to view only their own schedules from MY GRID, and to view the schedules of other individuals from THE GRID, which displays their schedules in less detail. Some users, such as the Dean or Department Chair, may be given access to view the schedules of all advisors from MY GRID. In this

situation, the BY ADVISOR option is available for selecting a specific advisor's schedule, and the BY ADVISOR field defaults to the first name on the alphabetical drop down menu.

1. If you do not have access rights to view others' schedules from MY GRID, skip to step #2. Otherwise, to display another advisor's schedule:

   a. Click on BY ADVISOR▼. A list of names will appear.

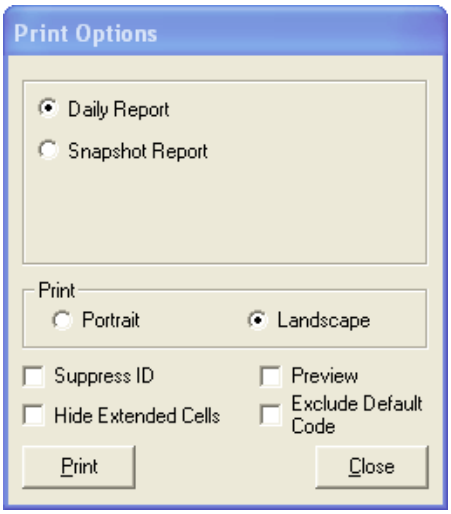
   b. Click on the selected name.

2. To display another date:

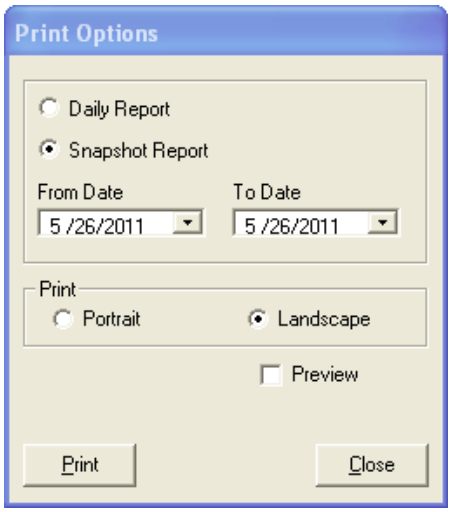
   a. Click on BY DATE ▼. A list of dates applicable to the advisor will appear.

   b. Click on the selected date. If the desired date is not listed, change the DATA VIEW; then select the date.

3. Click on PRINT. A Print Options screen will appear: Here is an example when the DAILY REPORT is selected:



Here is an example when the SNAPSHOT REPORT is selected:



The options are:

- DAILY REPORT: Use to display an individual's schedule for a single day and activate the options to suppress ID, hide extended cells, and/or exclude the Default Master Schedule Code. In Portrait mode, it displays each scheduled activity by time, and, if the activity is an appointment, the student's name, ID and telephone number, as well as the reason(s) for the appointment. In Landscape mode, the report also displays any comments about the activity.

  SUPPRESS ID: [Applicable only to the Daily Report] Use to prevent the report from printing the student's identifier.

  HIDE EXTENDED CELLS: [Applicable only to the Daily Report] Use to display only the starting time of each activity. This option will reduce the length of the report to be printed when a schedule contains extended appointments or extended activities.

  EXCLUDE DEFAULT CODE: [Applicable only to the Daily Report] Use to shorten the report by eliminating time slots that contain the Default Master Schedule Code, which is displayed in any cell for which no other Schedule Code has been entered (e.g., ////).

- SNAPSHOT REPORT: Use to display up to eight days per page of an individual's schedule, with each day represented in a column. The report displays the date and day of the week, the time of each scheduled activity, and the schedule code.

  FROM DATE: [Activated only if Snapshot Report is selected] Use to select the first date of a date range to be displayed on the report.

  TO DATE: [Activated only if Snapshot Report is selected] Use to select the last date of a date range to be displayed on the report.

- PRINT:

  PORTRAIT: Use to print each activity by time. It includes all information that is displayed in Landscape, except for Comments. The information is displayed vertically on a page.

  LANDSCAPE: [This is the default mode] Use to print each activity by time. If the activity is an appointment, this orientation shows the student's name, ID, and telephone number, as well as the reason(s) for the appointment. It also prints any comments about each activity. The information is displayed horizontally on a page.

- PREVIEW: Use to view the report on screen.
- PRINT: Use to print out a copy of the report.
- CLOSE: Use to exit the screen.

4. To view or print the DAILY REPORT, follow the steps below:

   a. Click on DAILY REPORT.

   b. Select the PRINT format (either PORTRAIT or LANDSCAPE).

   c. If desired, click on SUPPRESS ID.

   d. If desired, click on HIDE EXTENDED CELLS.

   e. If desired, click on EXCLUDE DEFAULT CODE. This option shortens the report by eliminating the time slots in which no other Schedule Code has been inserted.

   Note
   The EXCLUDE DEFAULT CODE option is useful when time increments are set for less than 30 minutes, which may cause the report to extend beyond a single page.

   f. Click on PREVIEW and then click on PRINT to view the report on the screen.

   -or-

   g. Click on PRINT. A print screen will appear. Click on PRINT.

Here is an example of the DAILY REPORT:

Daily Report

Millard Fillmore – Monday, May 23, 2011

Time	ID	Name/Description	Phone Number(s)	Reason Code(s) and Comments
8:00 AM		OPEN		
8:30 AM		OPEN		
9:00 AM	1111111	SMITH, JOHN		Career
9:30 AM	2222222	GRAY, GARY		Academic
10:00 AM		DROPIN		
10:30 AM		DROPIN		
11:00 AM		DROPIN		
11:30 AM		DROPIN		
12:00 PM		LUNCH		
12:30 PM		LUNCH		
1:00 PM		OPEN		
1:30 PM		OPEN		
2:00 PM		OPEN		
2:30 PM		OPEN		
3:00 PM		ORIENTATION		New Students
3:30 PM		ORIENTATION		New Students
4:00 PM		ORIENTATION		New Students
4:30 PM		ORIENTATION		New Students

5. To view or print the SNAPSHOT REPORT, follow the steps below:

   a. Click on SNAPSHOT REPORT. The FROM DATE and TO DATE fields will be enabled.

   b. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)

   c. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

   d. Select the PRINT format (either PORTRAIT or LANDSCAPE).

   e. Click on PREVIEW and then click on PRINT to view the report on the screen.

   -or-

   f. Click on PRINT. A print screen will appear. Click on PRINT.

Here is an example of the SNAPSHOT REPORT:

Snapshot Report

James K. Polk

TIMES	1/11/2011	1/12/2011	1/13/2011	1/14/2011	1/15/2011	1/18/2011	1/19/2011	1/20/2011
	Monday	Tuesday	Wednesday	Thursday	Friday	Monday	Tuesday	Wednesday
8:00 AM	BOOKED	DROPIN	OPEN	DROPIN	DROPIN	CLOSED	CONF	OPEN
8:30 AM	BOOKED	DROPIN	BOOKED	DROPIN	DROPIN	CLOSED	CONF	OPEN
9:00 AM	PREP	DROPIN	BOOKED	DROPIN	BOOKED	CLOSED	CONF	OPEN
9:30 AM	ORIENT	DROPIN	BOOKED	DROPIN	OPEN	CLOSED	CONF	OPEN
10:00 AM	“	MTG	BOOKED	DROPIN	DROPIN	CLOSED	CONF	BOOKED
10:30 AM	“	MTG	BOOKED	DROPIN	DROPIN	CLOSED	CONF	BOOKED
11:00 AM	“	MTG	OPEN	LUNCH	LUNCH	CLOSED	CONF	OPEN
11:30 AM	PREP	MTG	BOOKED	LUNCH	LUNCH	CLOSED	CONF	BOOKED
12:00 PM	LUNCH	BOOKED	OPEN	OPEN	BOOKED	CLOSED	CONF	OPEN
12:30 PM	LUNCH	OPEN	LUNCH	OPEN	BOOKED	CLOSED	CONF	LUNCH
1:00 PM	DROPIN	BOOKED	PREP	PREP	PREP	CLOSED	CONF	PREP
1:30 PM	DROPIN	DROPIN	DROPIN	DROPIN	DROPIN	CLOSED	CONF	DROPIN
2:00 PM	DROPIN	DROPIN	DROPIN	DROPIN	DROPIN	CLOSED	CONF	DROPIN
2:30 PM	DROPIN	BOOKED	OPEN	BOOKED	OPEN	CLOSED	CONF	OPEN
3:00 PM	DROPIN	BOOKED	BOOKED	OPEN	OPEN	CLOSED	CONF	OPEN
3:30 PM	DROPIN	BOOKED	OPEN	BOOKED	OPEN	CLOSED	CONF	OPEN
4:00 PM	OFF	OFF	OFF	OFF	OFF	CLOSED	OFF	OFF
4:30 PM	OFF	OFF	OFF	OFF	OFF	CLOSED	OFF	OFF
5:00 PM	OFF	OFF	OFF	OFF	OFF	CLOSED	OFF	OFF
5:30 PM	OFF	OFF	OFF	OFF	OFF	CLOSED	OFF	OFF
6:00 PM	OFF	OFF	OFF	OFF	OFF	CLOSED	OFF	OFF
6:30 PM	OFF	OFF	OFF	OFF	OFF	CLOSED	OFF	OFF
7:00 PM	OFF	OFF	OFF	OFF	OFF	CLOSED	OFF	OFF
7:30 PM	OFF	OFF	OFF	OFF	OFF	CLOSED	OFF	OFF

Printed: 1/11/2011 8:30:30 AM Location: ADVISING

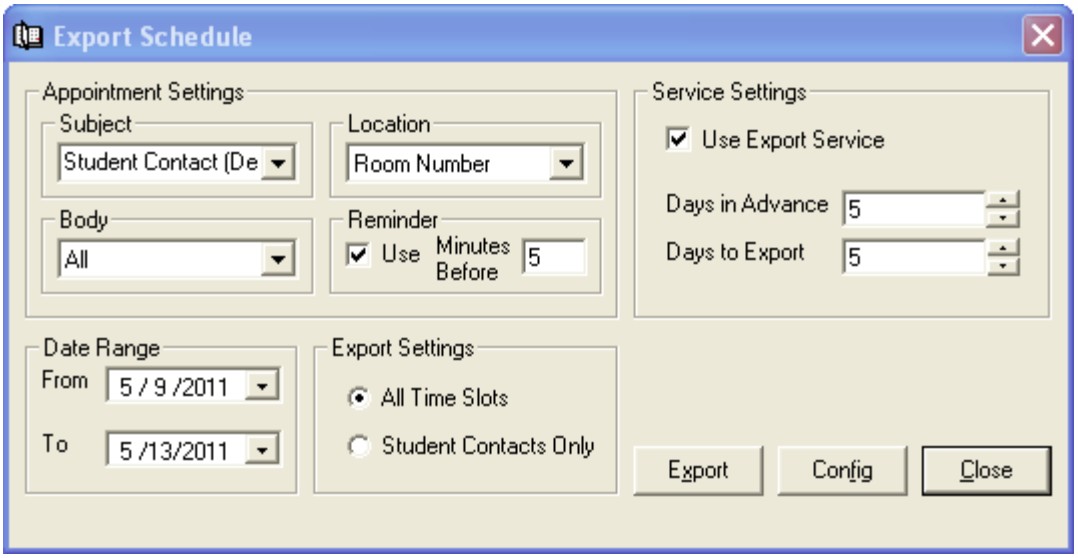
10.5 Export a Schedule into Microsoft Outlook™

An automated process exists for exporting schedules into Microsoft Outlook. After that program has been activated by computer staff, advisors will need to configure their own settings for the export process.

Note
This option is available only if the EMAIL ADDRESS field for the advisor on the SHORT NAME MAINTENANCE screen is completed with the email address provided by the college and which corresponds with the advisor's calendar in Microsoft Outlook. (See Short Name Maintenance in Part I, Section 4.7.)

If an advisor is assigned to more than one Location, the steps described below will need to be performed separately for each Location. The advisor must start from MY GRID in the desired Location when starting each export process.

1. From MY GRID, press **ALT+X** to display the Outlook Export screen. Here is an example:



The options are:

- APPOINTMENT SETTINGS

SUBJECT:	Use to select the information to be displayed in the Subject field of the Outlook Appointment screen.
LOCATION:	Use to select the information to be displayed in the Location field in the Outlook Appointment screen.
BODY:	Use to select the information to be displayed in the body of the Outlook appointment screen.
REMINDER:	
USE:	Use to activate a feature that provides an audible (beep) and visual (popup message) alert about upcoming appointments.

MINUTES BEFORE: Use to enter the number of minutes prior to appointment start times that reminders will be sent.

- DATE RANGE

  FROM: Use to select the earliest date for which appointments should be exported to Outlook Calendar.

  TO: Use to select the latest date for which appointments should be exported to Outlook Calendar.

- EXPORT SETTINGS

  ALL TIME SLOTS: Use to export all activities to a user's Outlook calendar.

  STUDENT CONTACTS ONLY: Use to export only those activities associated with direct student contact to a user's calendar.

- SERVICE SETTINGS [Available only if the Automated Export Program has been installed]

  USE EXPORT SERVICE: Use to select the option to automate the export process from SARS·GRID to Microsoft Outlook™.

  DAYS IN ADVANCE: Use to specify the number of days in advance to start the automated export process. "0" means to include "today." "1" means to start tomorrow. "2" means to start the day after tomorrow, etc.

  DAYS TO EXPORT: Use to specify the number of days to include in the automated export. The range is 1 – 999. If "5" is selected, five days will be exported.

- EXPORT: Use to initiate the manual export process from SARS·GRID to Microsoft Outlook™.

- CONFIG: Use to filter which Schedule Codes will be exported with the "All Time Slots" export setting. This is a one-time set up, unless it later becomes necessary to change the configurations.

- CLOSE: Use to exit the Outlook Export screen.

2. Click on SUBJECT ▼ to make a selection for use in the subject field. Then choose one of the following three options:

   a. Select STUDENT CONTACT (the default) to display the words "Student Contact" in the field.

   b. Select STUDENT NAME to have the screen display the student's name as listed in SARS·GRID.

   c. Select CUSTOM to enter your own description for this field. For example: "Booked Appointment."

3. Click on LOCATION ▼ to make a selection for the location field. Then choose one of the following three options:

   a. Select BLANK (the default) to leave this field empty.

   b. Select SARS·GRID Location to display the location code description from SARS·GRID.

   c. Select ROOM NUMBER to display the room number assigned to the advisor.

   Note
   The location of the appointment is displayed in parentheses in the subject field if the Location field is not Blank.

4. Click on BODY ▼ to select the data items to be displayed in the main body of the appointment detail screen. Then choose one of the following six options:

   a. Select COMMENTS (the default) to display the descriptive reason for the appointment.

   b. Select COMMENTS AND REASON CODES to display both the descriptive reason for the appointment and the associated reason code.

   c. Select STUDENT NAME to display the student's name.

   d. Select ID + STUDENT NAME to display both the student's name and his/her identifier.

   e. Select ALL to display all of the following information: Comments, Reason Codes, Student Name, and ID.

   f. Select BLANK to leave the body of the appointment empty.

5. [optional] If you wish to activate the REMINDER feature that notifies the advisor of an imminent appointment with a popup message and an audible signal, follow the steps below:

   a. Click on USE to activate the feature that notifies the advisor of an imminent appointment.

   b. In MINUTES BEFORE, enter the number of minutes prior to the appointment time for the reminder to be displayed. For example, "10" will cause a reminder pop-up to be displayed ten minutes prior to the appointment time. The field will accept up to three digits.

6. In DATE RANGE, click on FROM ▼ to select the earliest date for which appointments will be exported. All of the dates in Current and Future Data View are available.

7. In DATE RANGE, click on TO ▼ to select the latest date for which appointments will be exported. All of the dates in Current and Future Data View are available.

8. Click on ALL TIME SLOTS to export the entire calendar to the user's Outlook calendar.

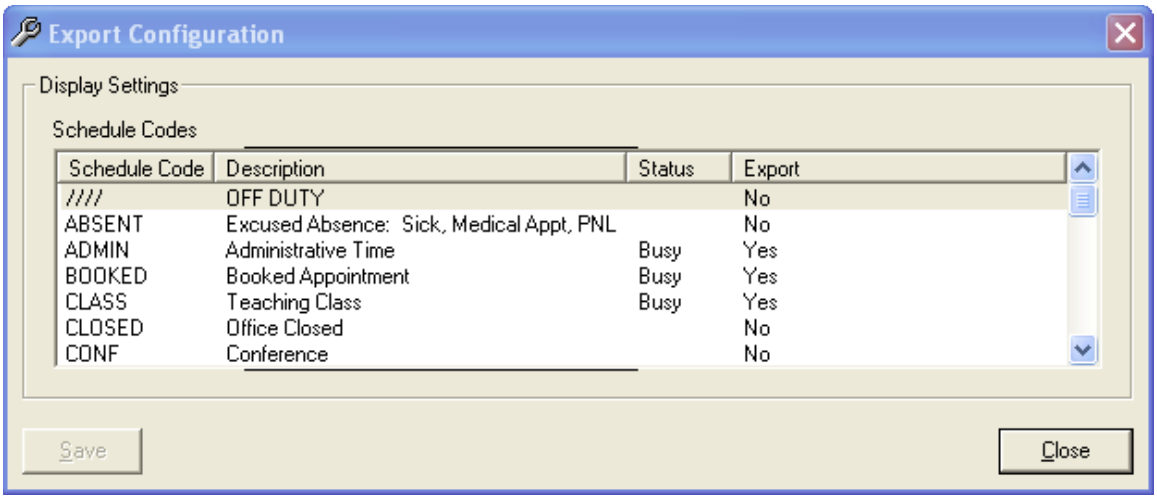
   -or-

9. Click on STUDENT CONTACTS ONLY to export only the time slots containing student appointments to the user's Outlook calendar.

10. If ALL TIME SLOTS is selected (see step 8, above) and this is a first time set up or if changes need to be made to previously established configurations, click on CONFIG to display the

Export Configuration screen. This screen is used to select the Schedule Codes to be exported and to ensure that the status of the time slot is correct. Otherwise, skip to step 11.

Here is an example of the EXPORT CONFIGURATION screen:



Schedule Code	Description	Status	Export
////	OFF DUTY		No
ABSENT	Excused Absence: Sick, Medical Appt, PNL		No
ADMIN	Administrative Time	Busy	Yes
BOOKED	Booked Appointment	Busy	Yes
CLASS	Teaching Class	Busy	Yes
CLOSED	Office Closed		No
CONF	Conference		No

The options are:

- SCHEDULE CODE: Used to display each Schedule Code.
- DESCRIPTION: Used to display a more complete description of the Schedule Code.
- STATUS: Use to select whether the time slot represented by the Schedule Code should be marked as BUSY, FREE, TENTATIVE, or OUT OF OFFICE. The default is set at BUSY.
- EXPORT: Use to select whether the Schedule Code should be exported to Outlook (YES) or not (NO). The default is set at NO.
- SAVE: Use to save the selections.
- CLOSE: Use to exit the screen.

a. Click on the row containing the applicable Schedule Code. In the EXPORT column, click on ▼ to select either YES (to indicate that the Schedule Code will be exported to your Outlook calendar) or NO (to indicate that the Schedule Code will not be exported). The default is set at NO.

b. Click on the row containing a Schedule Code for which the Export option has been set as YES. Note the STATUS setting (the default is BUSY). To change the status, click on ▼ to select one of the following: FREE, TENTATIVE, BUSY, OUT OF OFFICE.

Note
The status for any Booked Codes (for example, Booked, Showed and No Show) should be set as BUSY.

c. Click on SAVE.

d. Repeat steps a - c for each Schedule Code to be exported.

e. When done, click on CLOSE.

11. If the option to automate the export process has been installed at your school, it is possible to establish settings for using the automated export feature.

    a. In the SERVICE SETTINGS panel, click on USE EXPORT SERVICE to select the automatic export option.

    b. Click on the DAYS IN ADVANCE field and select the number of days in advance of today that the automatic export should start. If “0” is selected, the export will start today. If “1” is selected, the export will start tomorrow. If “2” is selected, the export will start the day after tomorrow, etc.

    c. Click on the DAYS TO EXPORT field and select the number of days to include in the export. For example, if “5” is selected, five days will be exported to Microsoft Outlook™.

    d. Skip Step 12, which is used only for the manual export process.

12. [If using the manual export process] Click on EXPORT to initiate the action of exporting the selected data to Microsoft Outlook™. A confirmation message will be displayed.

    a. Click on YES.

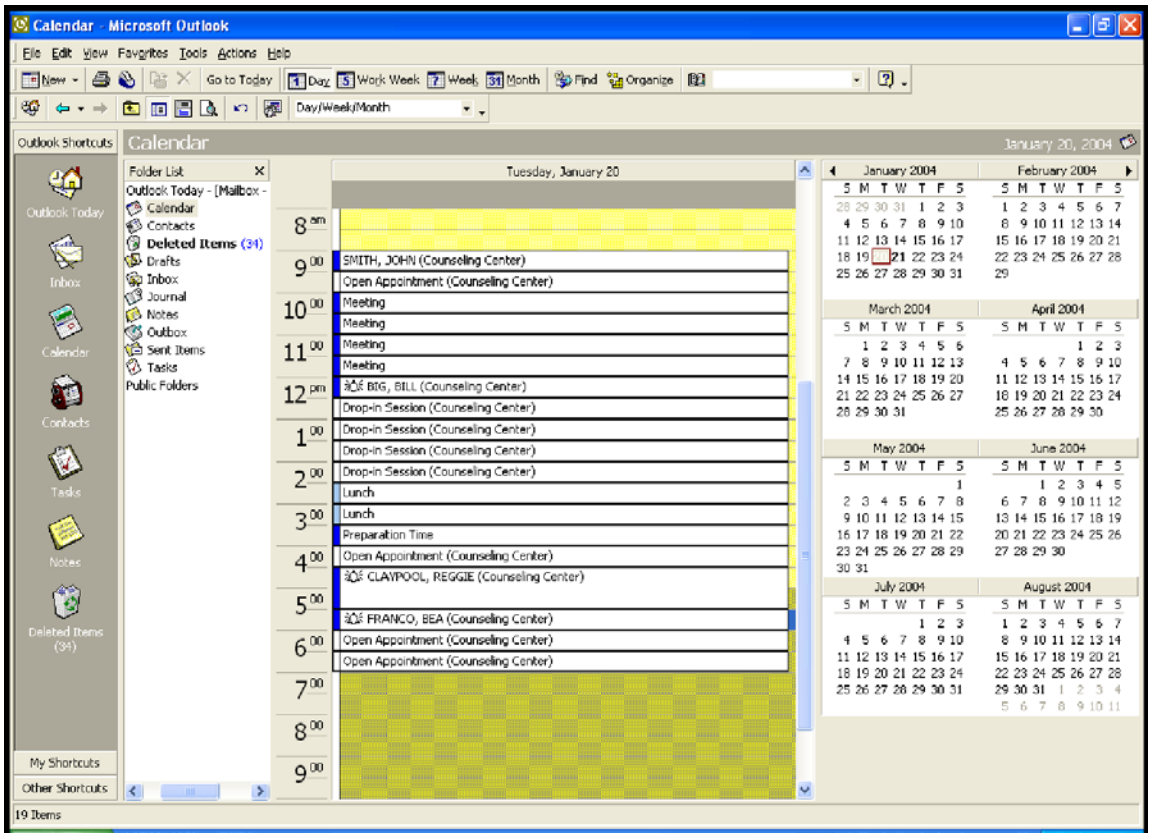
    b. When the export process is completed, a confirmation screen will be displayed.

    c. Click on OK.

13. Click on CLOSE.

10.6 View Appointment Calendars in Microsoft Outlook™

1. In Microsoft Outlook™, click on CALENDAR. The calendar page will display the imported appointment information, as shown on the following page.



2. To view the appointment detail for a particular student, click anywhere within the appointment time slot. A detail screen will be displayed as in the example above for the 9:00 a.m. time slot containing the name SMITH, JOHN. (Note that the entries in the Subject and Location fields are based on the selections made in the Outlook Export Screen.) Microsoft Outlook™ uses colors to designate types of activities, as follows: FREE = white, TENTATIVE = turquoise; BUSY = Royal Blue; and OUT OF OFFICE = Purplish-brown.

SECTION 11 — MY GRID (WEB VERSION)

11.0 Overview

If the college permits advisors to work with their schedules from home or another remote location, the following options will be available:

11.1 Log in from Home

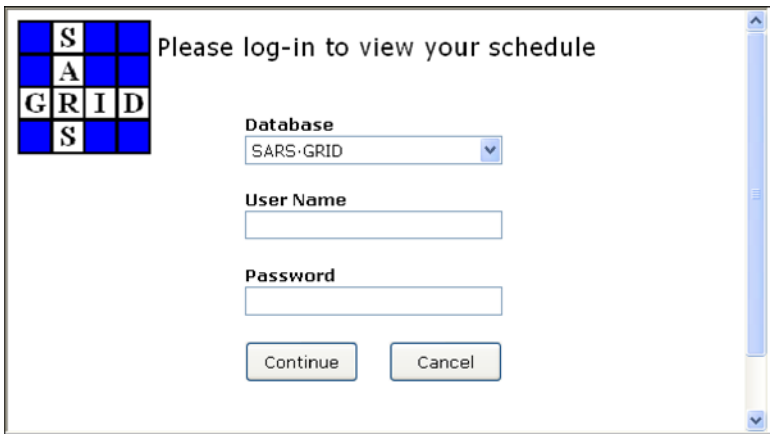
11.2 Change a Schedule from Home

11.3 View or Print a Schedule from Home

The process for installing and configuring MY GRID for remote use is discussed in “Install and Configure MY GRID (Web Version)” in Part VII, Section 47.

11.1 Log In from Home

1. Log in to SARS via the school’s public website (to be provided by school). The following screen will be displayed:



The options are:

- DATABASE: Use to select the SARS database associated with the schedule.
- USER NAME: Use to enter your SARS user name.
- PASSWORD: Use to enter your SARS password.
- CONTINUE: Use to proceed to MY GRID.
- CANCEL: Use to exit the Login screen.

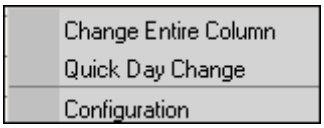
2. If the Database field is displayed, click on DATABASE ▼ and select the database that the department uses for this schedule. Otherwise, skip to Step 3.

3. Click on USER NAME and type in your SARS user name.

4. Click on PASSWORD and type in your SARS password.

5. Click on CONTINUE. The advisor's own grid will be displayed.

6. To re-configure the display on MY GRID, right click from anywhere in MY GRID. The following menu will be displayed:



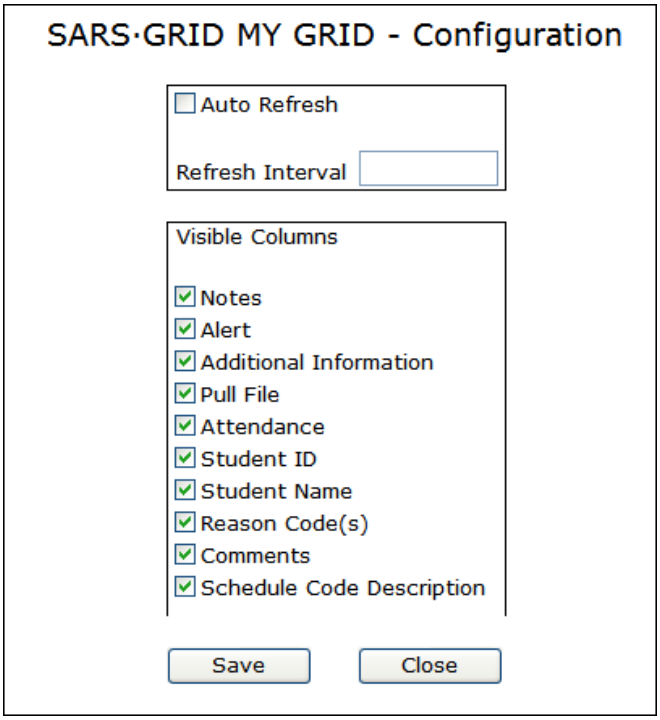
The options are:

- CHANGE COLUMN: Use to change part or all of a column on MY GRID to the same Schedule Code, or to change an entire column to the advisor's Master Schedule. This will be enabled if the user has been granted access rights to MY GRID – CHANGE SCHEDULE CODES (APPOINTMENT ALLOWABLE and NON-APPOINTMENT ALLOWABLE).

- QUICK DAY CHANGE: Use to change an advisor's schedule on MY GRID. This will be enabled if the user has been granted access rights to MY GRID – CHANGE SCHEDULE CODES (APPOINTMENT ALLOWABLE or NON-APPOINTMENT ALLOWABLE).

- CONFIGURATION: Use to change the appearance of the screen.

a. Click on CONFIGURATION. The following screen will be displayed:



b. To have MY GRID refresh the data automatically, click on AUTO REFRESH. Then click on REFRESH INTERVAL and type in the number of seconds that should elapse between each refresh action.

c. Under VISIBLE COLUMNS, click on the checkboxes adjacent to the columns that you wish to be displayed, or uncheck those that should not be displayed.

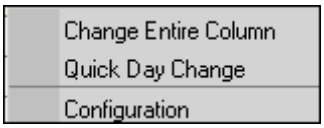
d. Click on SAVE.

e. Click on CLOSE to exit the Configuration screen.

11.2 Change a Schedule from Home

All advisors will be able to configure the display of MY GRID, and to view and print their own schedules. If users have permission to change appointment-allowable Schedule Codes and to change non-appointment allowable Schedule Codes, they will have access to additional options.

1. Right click from anywhere in MY GRID. The following menu will be displayed:



The options are:

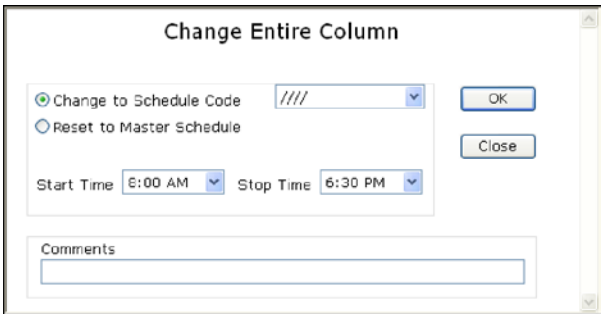
- CHANGE COLUMN: Use to change part or all of a column on MY GRID to the same Schedule Code, or to change an entire column to the individual's Master Schedule.
- QUICK DAY CHANGE: Use to change an advisor's schedule on MY GRID.
- CONFIGURATION: Use to change the appearance of the screen. (See Section 11.1, above.)

2. To change a schedule using CHANGE COLUMN, follow the steps below:

a. On MY GRID, click on the desired date for which changes need to be made.

b. Right click to display the change menu.

c. Click on CHANGE ENTIRE COLUMN to display the screen shown below.



d. Click on the CHANGE TO SCHEDULE CODE option and then click on ▼ to display a list of Schedule Codes. Then select the Schedule Code to be inserted in the column. Then,

i) Click on START TIME to select the earliest time to start the workday.

ii) Click on STOP TIME to select the latest time to schedule an appointment in the workday.

iii) [Optional] Click on the COMMENTS field and type in any comments about the change.

-or-

e. Click on RESET TO MASTER SCHEDULE.

f. Click on OK.

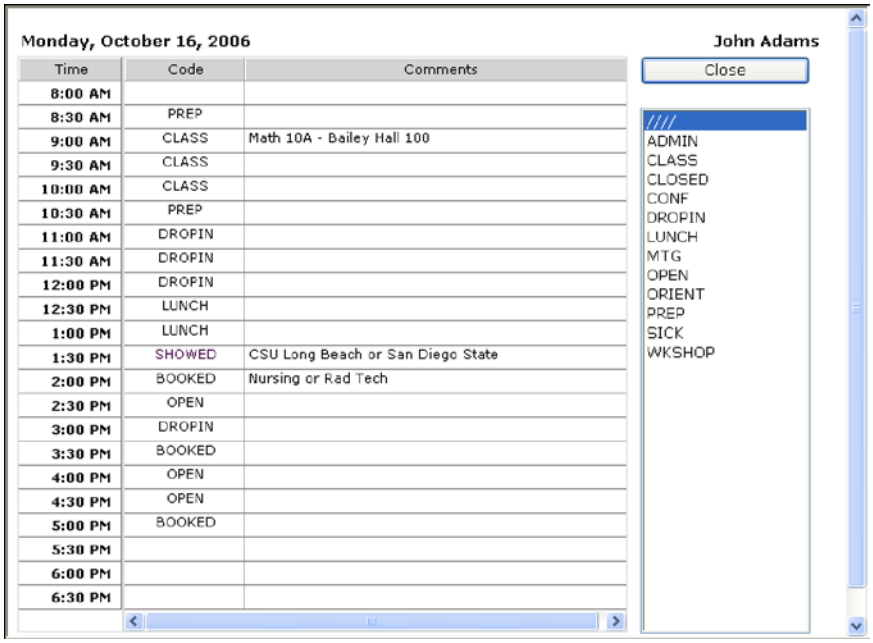
g. Click on CLOSE.

3. To change the schedule using QUICK DAY CHANGE, follow the steps below.

a. On MY GRID, click on the desired date for which changes need to be made.

b. Right click to display the change menu.

c. Click on QUICK DAY CHANGE. Here is an example of the screen:



d. Click on a Schedule Code in the right-hand column to be inserted into the Schedule Code column.

e. Click on the desired time of day in the CODE column to insert the selected Schedule Code into that field.

f. [Optional] Click on the adjacent field in the COMMENTS column and type in any comments associated with the Schedule Code.

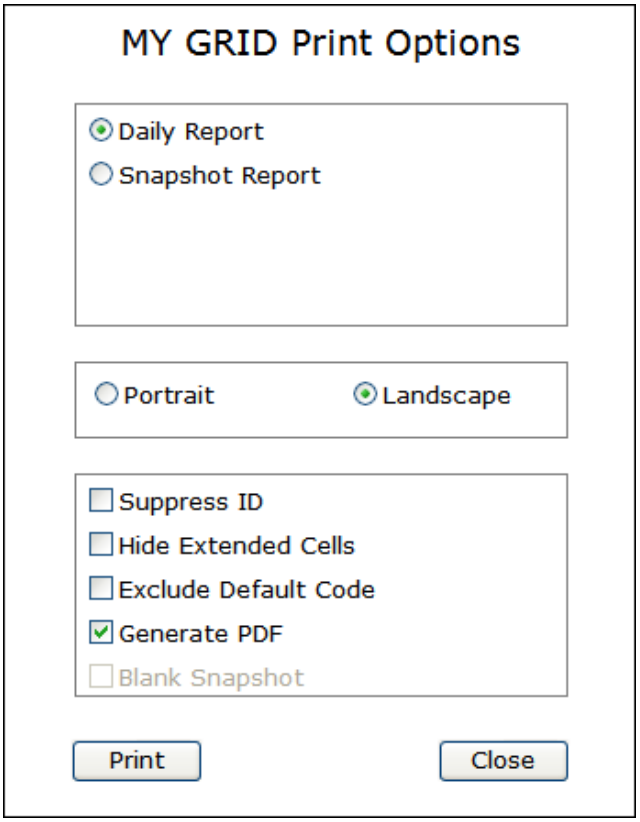
g. Continue replacing Schedule Codes and Comments as needed.

h. When done, click on CLOSE.

11.3 View or Print a Schedule from Home

Two schedule reports are available from MY GRID: The Snapshot Report, and the Daily Report. Each report may be printed either as a PDF file or as a web page. If a report is printed as a web page, it will not print the lines separating columns and rows.

1. From MY GRID, click on PRINT. The following screen will be displayed:



The options are:

- DAILY REPORT: Use to view or print the Daily Report.

  PORTRAIT: Use to orient the Daily Report vertically on the page.

  LANDSCAPE: Use to orient the Daily Report horizontally on a page.

- SNAPSHOT REPORT: Use to view or print the Snapshot Report.

FROM DATE:	Use to establish the first date to be included in the Snapshot Report.
TO DATE:	Use to establish the last date to be included in the Snapshot Report.
• SUPPRESS ID:	[Applicable only to Daily Report] Use to hide the student IDs from being displayed on the report.
• HIDE EXTENDED CELLS:	[Applicable only to Daily Report] Use to display only the starting time of each activity. This option will reduce the length of the report to be printed when a schedule contains extended appointments or extended activities.
• EXCLUDE DEFAULT CODE:	[Applicable only to Daily Report] Use to shorten the report by eliminating time slots that contain the Default Master Schedule Code, which is displayed in any cell for which no other Schedule Code has been entered (e.g., ////).
• GENERATE PDF:	Use to print the report in PDF format (column and rows will be demarcated by lines).
• BLANK SNAPSHOT:	Use to generate a Snapshot Report format that displays appointment times but is otherwise blank for use in drafting a week-long master schedule by hand.
• PRINT:	Use to view or print the report.
• CLOSE:	Use to exit the screen.

2. To print the Daily Report:

   a. Click on DAILY REPORT.

   b. Click on either PORTRAIT to print the report vertically, or on LANDSCAPE to print the report horizontally.

   c. [Optional] Click on SUPPRESS ID to prevent student IDs from being displayed or printed.

   d. [Optional] Click on HIDE EXTENDED CELLS to display only the starting time of each activity.

   e. [Optional] Click on EXCLUDE DEFAULT CODE if you do not want the report to include time slots that contain the Default Master Schedule Code.

   f. Click on GENERATE PDF to print the report in that format.

   g. Click on PRINT.

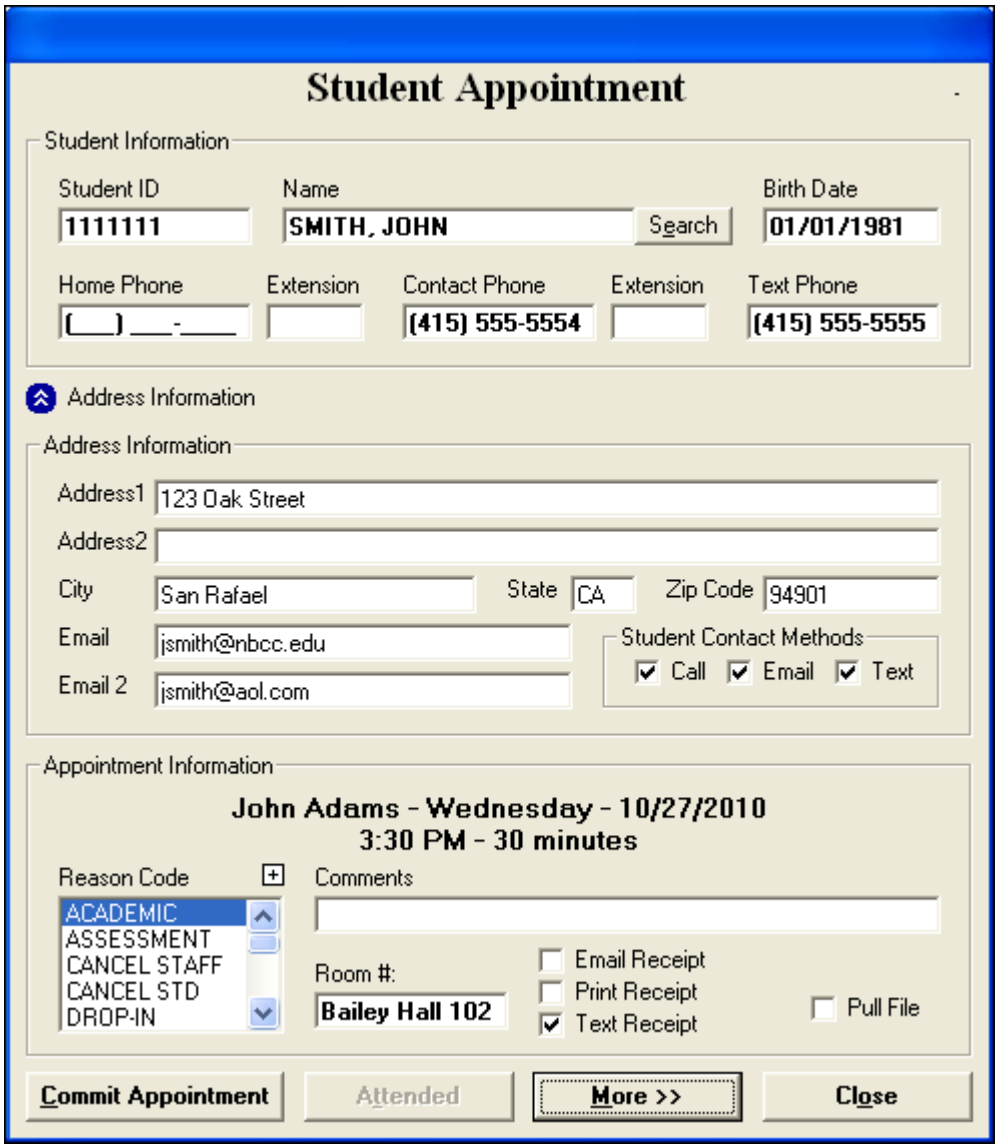
   h. Click on CLOSE.

3. To print the Snapshot Report:
   a. Click on SNAPSHOT REPORT.
   b. Click on FROM DATE and select the earliest date to be included in the report.
   c. Click on TO DATE and select the last date to be included in the report.
   d. Click on GENERATE PDF to print the report in that format.
   e. Click on PRINT.
   f. Click on CLOSE.
4. To print a blank Snapshot Report:
   a. Click on SNAPSHOT REPORT.
   b. Click on FROM DATE and select any date.
   c. Click on TO DATE and select the same date as the FROM DATE.
   d. Click on BLANK SNAPSHOT.
   e. Click on GENERATE PDF to print the report with lines demarcating columns and rows.
   f. Click on PRINT.
   g Click on CLOSE.
5. When done, click on LOG OFF to return to the Log-In screen.

SECTION 12 — THE STUDENT APPOINTMENT SCREEN

12.0 Overview

The Student Appointment screen is used to make appointments from THE GRID and from MY GRID. On the following page is an example of the screen layout before an appointment has been made. It has been expanded to display the address fields.



When a user enters the STUDENT APPOINTMENT screen to schedule an individual appointment, the following options will be displayed:

- STUDENT INFORMATION:

STUDENT ID:	Use to record the student identifier (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID). The **F9** function key toggles the field to accept other ID

formats, if they are being used by the Location. In such a case, the field name will display the selected ID format.

NAME: Use to record the student's name.

SEARCH: Use to search for a Student Name or ID.

BIRTH DATE: Use to record the student's date of birth.

HOME PHONE: Use to record the student's permanent telephone number.

EXTENSION: Use to record the extension to the permanent telephone number.

CONTACT PHONE: Use to record the student's contact telephone number.

EXTENSION: Use to record the extension to the contact telephone number.

TEXT PHONE: Use to record the student's cell phone number if it has text messaging capabilities.

- ADDRESS INFORMATION:

ADDRESS 1: Use to record the student's primary street address.

ADDRESS 2: Use to record the student's secondary street address.

CITY: Use to record the city of the student's address.

STATE: Use to record the state of the student's address. Up to 20 characters are available to accommodate international addresses.

ZIP CODE: Use to record the zip code of the student's address.

EMAIL: Use to record the student's e-mail address.

E-MAIL 2: Use to record a second e-mail address for the student, if applicable.

- STUDENT CONTACT METHODS: Use to select the acceptable method(s) for contacting the student. Any combination, all or none may be selected.

CALL: Use to select the option to call the student by telephone. This option is required if SARS·CALL will be used to make automated telephone calls for appointment reminders or other messages.

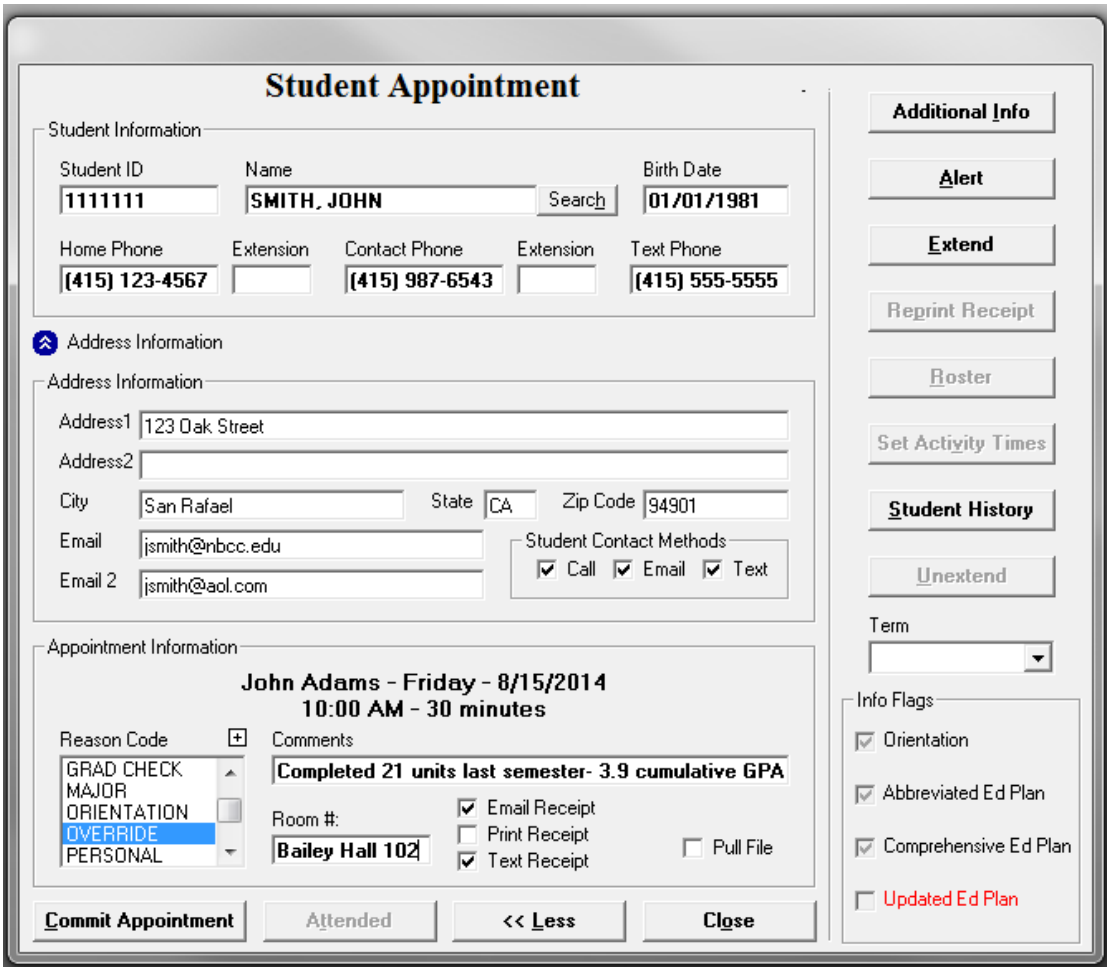
EMAIL: Use to specify that the student may be contacted via e-mail. This option is required if SARS·CALL will be used to send email messages for appointment reminders or other notices. It is also required for students to receive email receipts of appointment confirmations.

TEXT:	Use to specify that the student may be contacted via text messaging.
• APPOINTMENT INFORMATION:	
REASON CODE:	Use to represent the purpose for making a specific appointment.
+:	Use to display a screen showing all Reason Codes at a glance and to select one or more codes from that screen.
COMMENTS:	Use to enter specific information about the reason for making an appointment.
ROOM #:	Use to display on the STUDENT APPOINTMENT screen and on the appointment receipt the advisor's room number in order to advise the student of the location of the scheduled appointment.
EMAIL RECEIPT:	Use to send an email receipt to the student when an appointment is scheduled. This option will be disabled if the student does not have an email address. The email option under Student Contact Methods must also be checked for this to be operational.
PRINT RECEIPT:	Use to print a receipt when an appointment is scheduled.
TEXT RECEIPT:	[Available if the college has a valid license for text messaging] Use to send a receipt to the student via text messaging when an appointment is scheduled. This option will be disabled if the student does not have a text cell phone. The Text option under Student Contact Methods must also be checked for this to be operational.
PULL FILE:	Use when scheduling an appointment to indicate whether files need to be pulled.
• COMMIT APPOINTMENT:	Use to obligate the appointment. [Activated only after the scheduler has entered a student's ID and moved to the next field.]
• ATTENDED:	Use to record whether a student attended a scheduled appointment. [Activated only after the scheduler has committed the appointment.]
• MORE>>/<<LESS:	Use to display the additional options section on the right-hand side of the screen. MORE>> is a toggle button. After it is clicked, the button is renamed <<LESS.
• CLOSE:	Use to exit the screen.

Note If the STUDENT APPOINTMENT screen is closed with the ADDRESS INFORMATION panel or the MORE>> view showing, the same view will be displayed when the user next opens the STUDENT APPOINTMENT screen.

Other options are available for use by clicking on MORE>>.

The screen will look like this when the screen is fully expanded:



These options include the following:

- ADDITIONAL INFO: Use to view, and if permitted, to record responses to pre-established questions that will provide more detailed information about the student. [May be available if the Location has opted to include this feature.]
- ALERT: Use to enter or display a message that is viewable by advisors or schedulers.
- EXTEND: Use to make a booked appointment longer.

- REPRINT RECEIPT: Use to print an appointment receipt after committing an appointment. [Activated only after the scheduler has committed the appointment.]
- ROSTER: (This option is enabled only for group appointments. See "The Roster" in this Part, Section 14.)
- SET ACTIVITY TIMES: [Enabled for any individual booked appointment if attendance has been marked YES] Use to set the actual start time and stop time of the appointment.
- STUDENT HISTORY: Use to gain access to the STUDENT HISTORY screen containing all appointment and drop-in history for the selected student, as well as a history of all answered eAdvising questions.
- UNEXTEND: Use to shorten an extended booked appointment one cell at a time.
- TERM: [Available if SHOW TERM LIST has been selected on the Miscellaneous Settings screen for this Location] Use to link the topic of the current appointment to a different term, as opposed to the current term (e.g., discussion of an Ed Plan for the next semester).
- INFO FLAGS: Use to display up to four Additional Information questions about the student, if they have been selected using the separate ADDINFO FLAGS utility. (See "Select Additional Info Flags for Display on the Student Appointment and Drop-in Screens" at Section 5.5.6.)

After an appointment has been committed, the COMMIT APPOINTMENT button will be replaced by the following.

- CANCEL APPOINTMENT: Use to cancel the selected appointment.

SECTION 13 — THE ROSTER

13.0 Overview

The Roster is used to view and print an alphabetical list of those students who are scheduled for a group appointment and, if given the appropriate permissions, to perform the following group appointment actions: cancel one or more students from the appointment, move a student to another appointment cell, copy a student appointment to another appointment cell, record appointment attendance, record additional information, reprint an appointment confirmation, and record Reason Codes and any corresponding comments. Also use to view the Student History screen, export the Roster to an external source, and move or copy a student from the Roster to the Drop-in Screen.

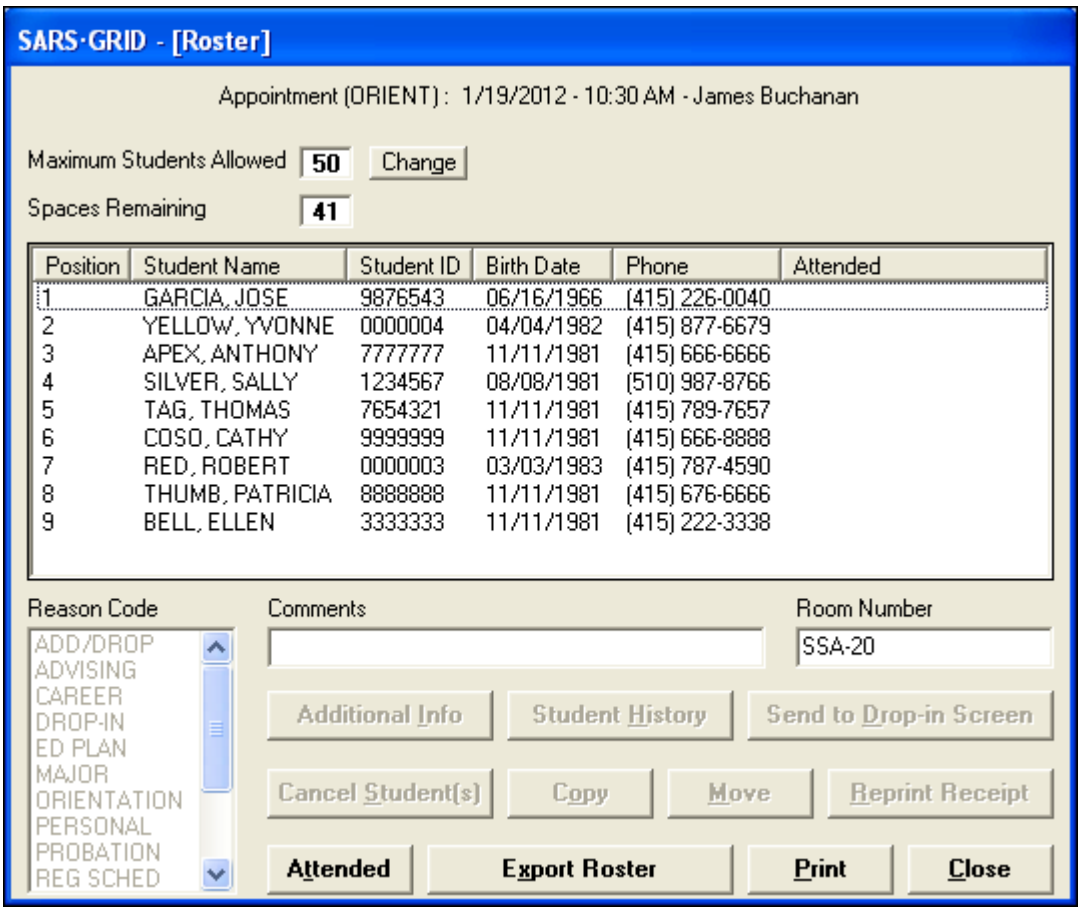
This section discusses the following topics pertaining to the Roster:

13.1 View and Print the Roster

13.2 Change the Maximum Number of Students Allowed

13.3 Export the Roster

Here is an example of the ROSTER when viewed from THE GRID:



The screen displays the position of each student (the order in which they were added to the group activity), Student Name, Student ID, Birth Date, Contact Phone and the Attendance status. The Roster will default to numerical order; however, you can click on the Student Name header to have the Roster displayed alphabetically by Student Name.

The following options appear on this screen:

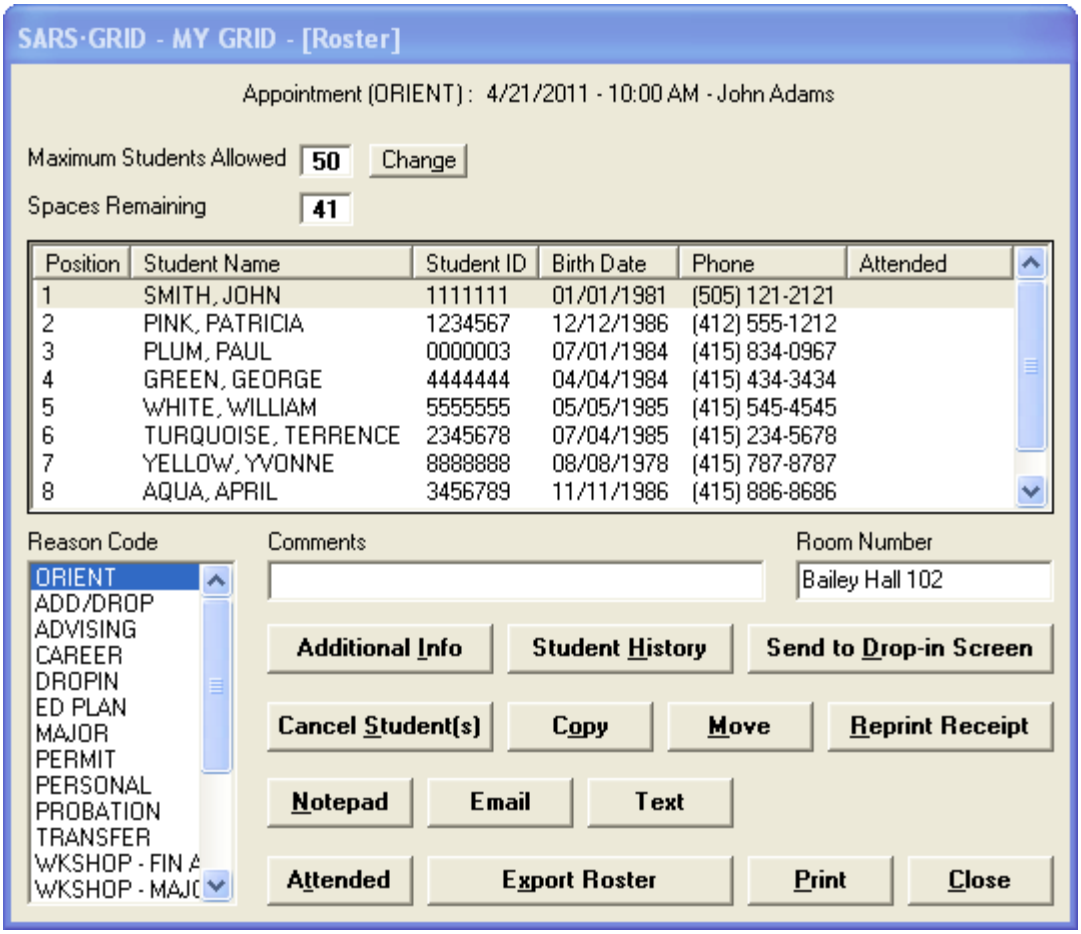
- REASON CODE: Use to represent the purpose for making a specific appointment.
- COMMENTS: Use to enter specific information about the reason for making an appointment.
- ROOM NUMBER: Use, if needed, to change the room number of the designated activity so that the appointment reminder will display the correct information.
- ADDITIONAL INFO: Use to view and, if permitted, to record responses to pre-established questions that will provide more information about the student. [May be available if the Location has opted to include this feature.]
- STUDENT HISTORY: Use to gain access to the Student History screen containing a student's appointment and drop-in history, as well as all eAdvising questions that have been answered.
- SEND TO DROP-IN SCREEN: Use to either copy or move a selected student on the Roster to the Drop-in Screen for a drop-in visit.
- CANCEL STUDENT(S): Use to cancel an appointment.
- COPY: Use to copy a student to another appointment slot while retaining the student in the current appointment.
- MOVE: Use to move a student who is scheduled in a group appointment to another appointment cell.
- REPRINT RECEIPT: Use to print an appointment receipt after committing an appointment.
- ATTENDED: Use to record whether a student attended a scheduled appointment.
- EXPORT ROSTER: Use to export the Roster to an external source.
- PRINT: Use to initiate printing of the ROSTER.
- CLOSE: Use to exit the screen.

In addition, the following information appears on this screen:

- MAXIMUM STUDENTS ALLOWED: Displays the total number of students that may be scheduled for a specific group appointment.

- CHANGE: If enabled, the user may change the maximum number of students allowed in the specific group appointment.
- SPACES REMAINING: Displays the number of students that may still be scheduled for a specific group appointment.
- STUDENT NAME: Displays student names on the ROSTER.
- STUDENT ID: Displays the students' identifiers.
- BIRTH DATE: Displays the students' dates of birth.
- PHONE: Displays the students' contact telephone number (or home number, if no contact number is listed).
- ATTENDED: Displays whether the student attended the scheduled appointment.

Here is an example of the ROSTER when viewed from MY GRID:



The following additional options appear on the Roster when it is opened from MY GRID:

- NOTEPAD: Use to display the Notepad in order to view, copy, print, write, delete and, in some cases, change the security status of notes about students.
- EMAIL: Use to send an e-mail message to a student. If the field is disabled, either the student does not have an e-mail address in the system or E-mail is not designated as a student contact method.
- TEXT: [Available if the college has a valid license for text messaging] Use to send a text message to a student. If the field is disabled, either the student does not have a text phone in the system or Text is not designated as a student contact method.

13.1 View and Print the Roster

The Roster may be viewed or printed by double-clicking on a group appointment cell on THE GRID or on MY GRID.

An example of the printed Roster, prior to attendance being recorded, is shown below.

Roster

John Adams

10/25/2010 at 2:30 PM

Orientation for New Students

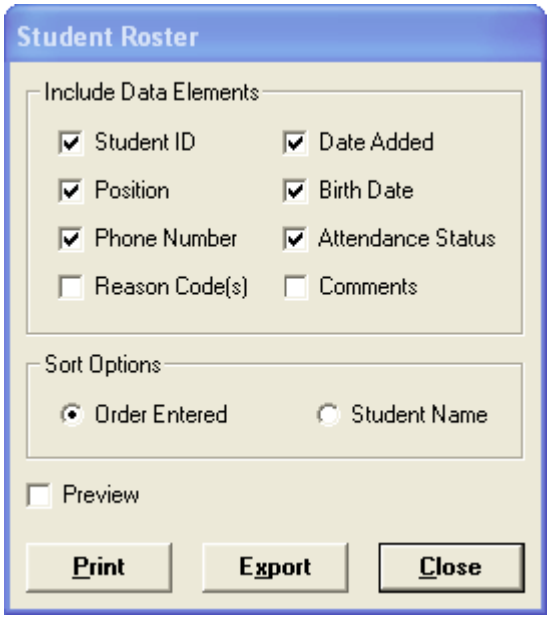
Room Number: Bailey Hall 102

Student Name	ID	Date Added	Position	Birth Date	Phone Number	Attend
INDIGO, IRIS	0000001	10/24/2010 7:20:22 PM	1	12/25/1985	(415) 822-3098	
TAN, THOMAS	0000002	10/24/2010 7:20:26 PM	2	1/1/1986	(415) 044-3681	
PLUM, PAUL	0000003	10/24/2010 7:20:30 PM	3	7/1/1984	(415) 834-0967	
GOLD, GARY	0000004	10/24/2010 7:20:34 PM	4	4/1/1984	(415) 838-3876	
LAVENDER, LAWRENCE	0000005	10/24/2010 7:20:38 PM	5	6/1/1971	(415) 987-2345	
SALMON, SALLY	0000006	10/24/2010 7:20:42 PM	6	8/3/1964	(415) 879-0128	
8CHARCOAL, CHARLES	0000007	10/24/2010 7:20:46 PM	7	9/4/1983	(415) 933-4876	
9MAGENTA, MARGARET	0000008	10/24/2010 7:20:49 PM	8	12/31/1985	(415) 763-3012	
BURGANDY, BERT	0000009	10/24/2010 7:20:52 PM	9	9/9/1979	(415) 992-9777	

Total number of students registered: 9
Total number of students who attended: 0
Total number of students who did not attend: 0

1. From THE GRID or MY GRID, double-click on the cell containing the group appointment. (If the appointment is at capacity, the Roster will be displayed immediately. Skip to step 4.)
2. On the STUDENT APPOINTMENT screen, click on MORE>>.
3. Click on ROSTER.
4. To print the list of students who are registered for the activity, click on PRINT.

The following screen will be displayed:



The options are:

- INCLUDE DATA ELEMENTS

STUDENT ID:	Use to include the student IDs on the Roster.
POSITION:	Use to display students on the Roster in the numerical order in which they were added to the Roster.
PHONE NUMBER:	Use to include the student phone numbers on the Roster.
REASON CODE(S):	Use to include the reason code(s) on the Roster.
DATE ADDED:	Use to include the date and time that each student was added to the Roster.
BIRTH DATE:	Use to include student birth dates on the Roster.
ATTENDANCE STATUS:	Use to include attendance status on the Roster.
COMMENTS:	Use to include comments on the Roster.

- SORT OPTIONS:

ORDER ENTERED:	Use to sort the report based on the order in which the students were added to the Roster.
STUDENT NAME:	Use to sort the report alphabetically by student name.

- PREVIEW: Use to view the Roster without printing.
- PRINT: Use to print the Roster.

- CLOSE: Use to close the Student Roster options screen.

5. In the INCLUDE DATA ELEMENTS panel, click on one or more of the desired data elements.

6. In the SORT ORDER panel, click on either ORDER ENTERED to sort the report in the order in which students were added to the Roster, or on STUDENT NAME to sort the report alphabetically by name.

7. To print without first viewing the report on screen, click on PRINT. A print screen will appear. Click on PRINT or OK.

   -or-

   To view the report on screen, click on PREVIEW and then click on PRINT. A preview of the selected report will be displayed. To make the screen display larger or smaller, click on the + or the – at the top of the preview report screen.

   a. To print, click on the print icon at the top. A print screen will be displayed. Click on PRINT or OK.

   b. To close the screen, click on the X at the upper right of the screen, or click on the icon to the left of the report title and then click on CLOSE.

8. Click on CLOSE to return to the STUDENT APPOINTMENT screen.

9. Click on CLOSE to return to THE GRID.

13.2 Change the Maximum Number of Students Allowed

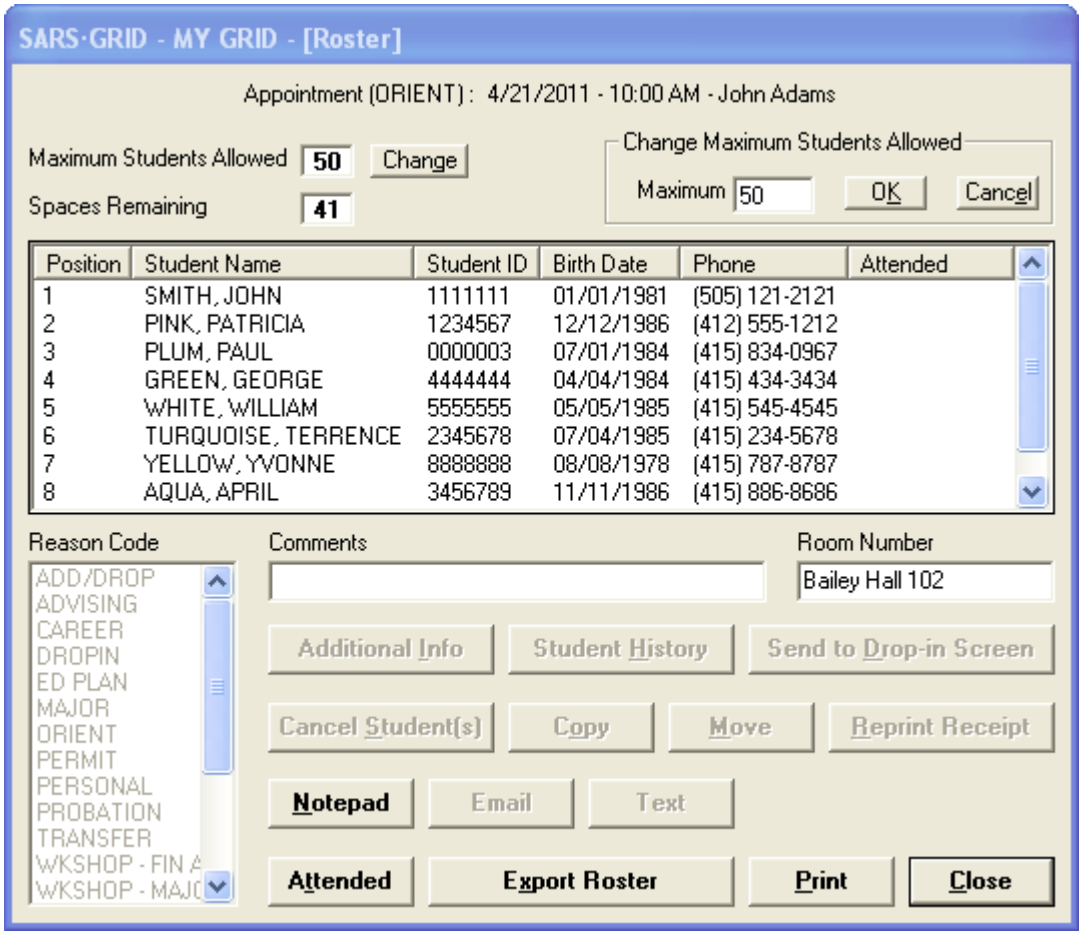
1. On THE GRID or MY GRID, double-click on the cell or row containing the group appointment.

2. If the appointment is not full, the STUDENT APPOINTMENT screen will be displayed. (If the appointment is at capacity, the ROSTER will be displayed immediately. Skip to step 5.)

3. On the STUDENT APPOINTMENT screen, click on MORE>>.

4. Click on ROSTER.

5. Click on CHANGE, which is adjacent to the field entitled MAXIMUM STUDENTS ALLOWED. The screen will now display a CHANGE MAXIMUM STUDENTS ALLOWED feature. Here is an example:



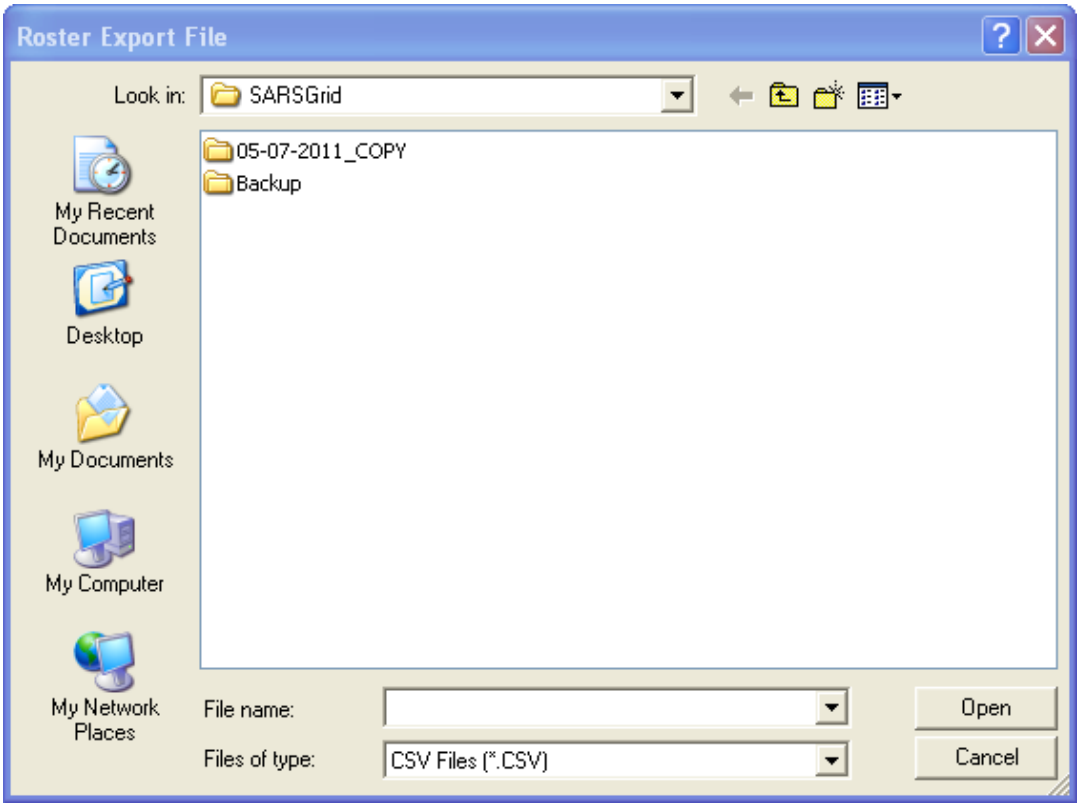
6. Click on the MAXIMUM field and type in a new number.

7. Click on OK.

13.3 Export the Roster

In addition to previewing and printing the Roster within the SARS·GRID application, an option exists to export the Roster to a .CSV file by following the steps below:

1. From the Roster, click on EXPORT ROSTER. A Roster Export File screen will be displayed. Here is an example:



2. Click on the FILE NAME field and type in or select the name of the Roster file. Click on OPEN. A confirmation message will be displayed.

3. Click on OK. The Roster will be available for use in the .CSV format.

SECTION 14 — THE STUDENT DROP-IN SCREEN

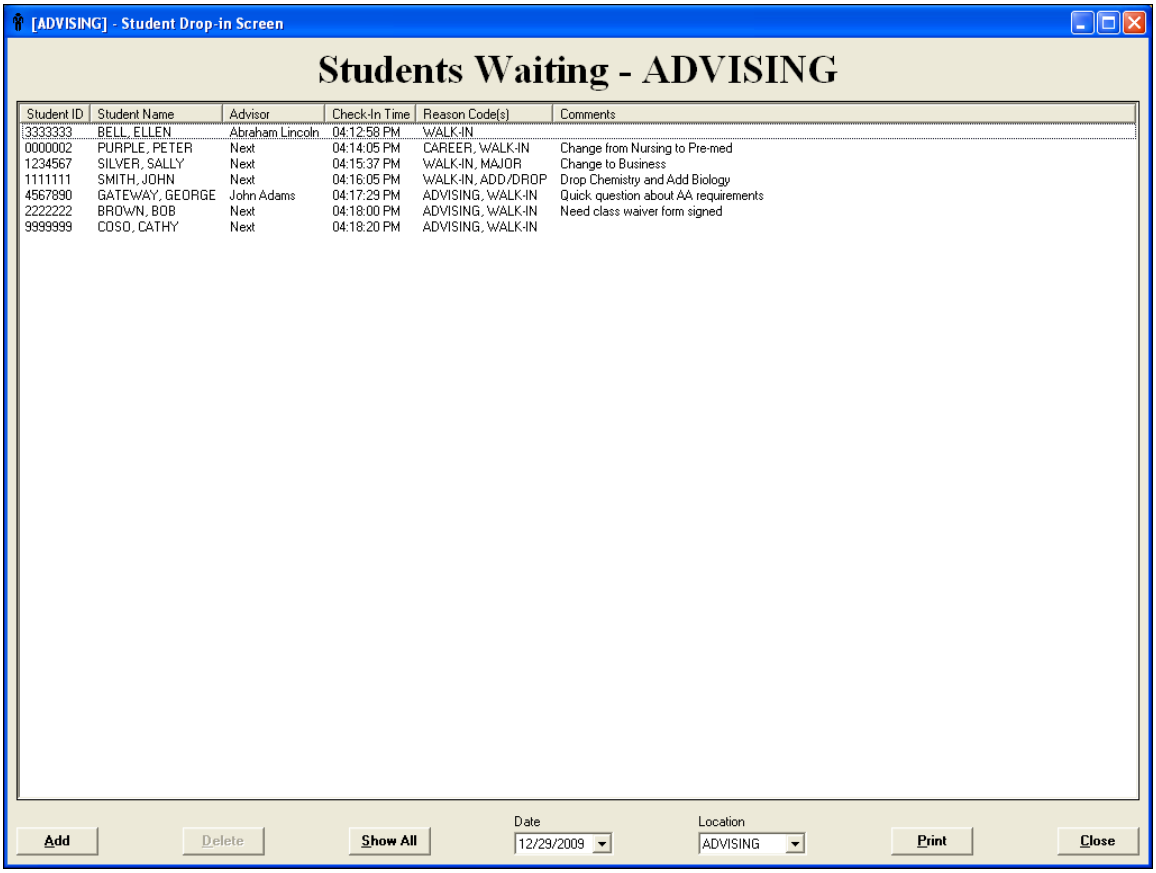
14.0 Overview

This section discusses the Student Drop-in Screen and how to configure it, as well as the Drop-in Appointment Screen.

The Student Drop-in Screen lists students who arrive for an unscheduled visit in the order of arrival and is used to assign those students to an advisor.

The screen displays, in chronological order, either a list of students who have not yet been seen by an advisor or a list of all students who have registered for a drop-in visit during that day. The display is dependant upon the SHOW ALL/WAITING toggle button mode. The screen may also display the Student ID and/or Reason Code associated with each visit, if those options have been selected. The two display modes for the Drop-in Screen are STUDENTS WAITING and ALL STUDENTS.

Here is an example of the STUDENTS WAITING screen.



The following options appear on this screen:

- STUDENT ID: Displays the student's identifier (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).
- STUDENT NAME: Displays student names on the Drop-in Screen.

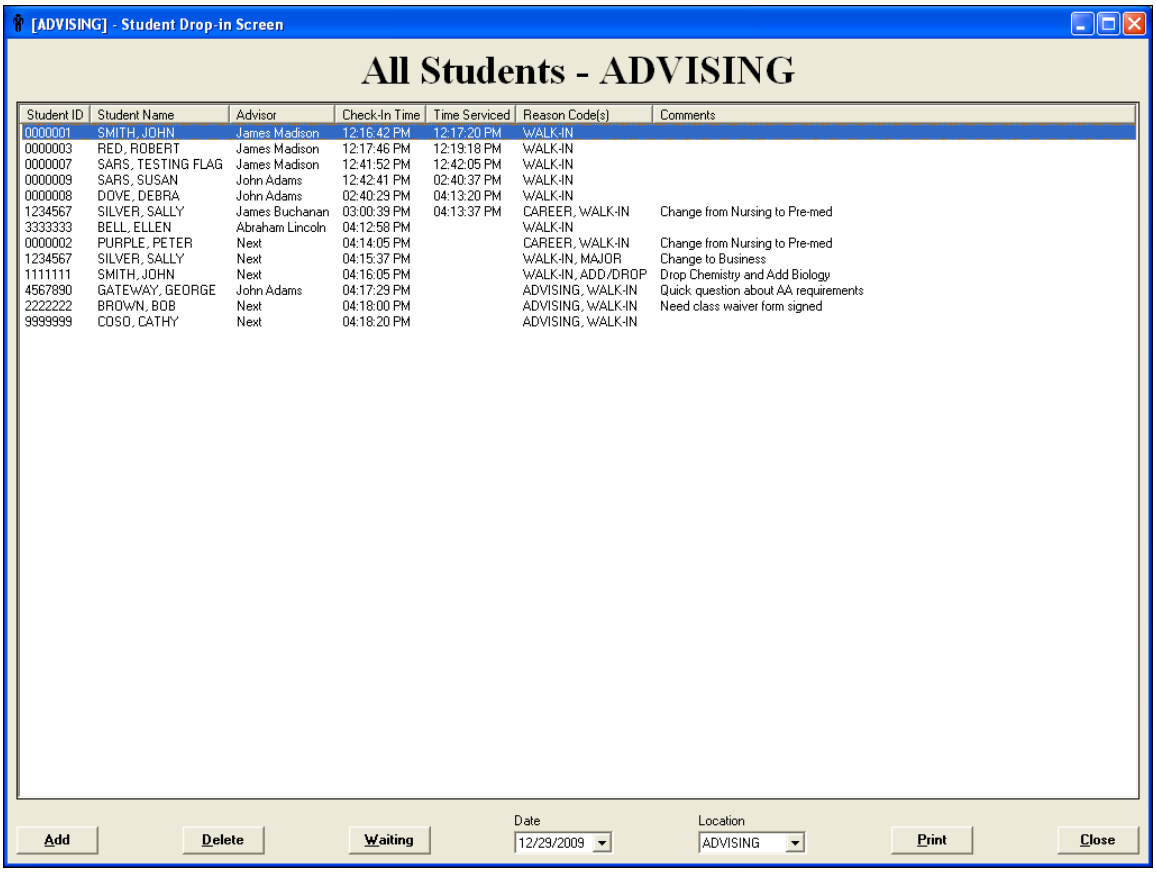
• ADVISOR:	Displays the advisor, if any, whom the student requested when registering for a drop-in visit. If no advisor was requested, NEXT will be displayed to indicate that the student will see the next available advisor.
• CHECK-IN TIME:	Displays the time that the student registered for a drop-in visit.
• COMMENTS:	Displays any specific information about the student's reason for the visit.
• ADD:	Use to display the DROP-IN APPOINTMENT SCREEN in order to add the student to the list of drop-ins who are requesting assistance without having pre-booked an appointment.
• DELETE:	Use to delete a student name from the drop-in list.
• SHOW ALL/WAITING:	Use this toggle button to display either all students who have signed in during the day (click on SHOW All to display the ALL STUDENTS mode) or only those students who are currently waiting to see an advisor (click on WAITING to display the STUDENTS WAITING mode).
• DATE:	[If this feature is available] Use to select a date for recording/viewing students on the list of drop-ins.
• LOCATION:	Use to select the desired Location for the drop-ins.
• PRINT:	Use to print a report listing all information for the selected date.
• CLOSE:	Use to exit the screen.

Notes

When the Drop-in screen is minimized on PCs using Windows XP, the number of students waiting will be displayed on the Task Bar. To display the number of students waiting on the Task Bar on PCs using Windows 7, right click on the Task Bar and select PROPERTIES. Then select NEVER COMBINE.

To set up a waiting list screen that may be viewed by students, see THE PUBLIC VIEWER WAITING LIST in this Part, Section 18.

Here is an example of the screen in the ALL STUDENTS mode (displayed by clicking on the SHOW ALL button at the bottom of the STUDENTS WAITING screen).

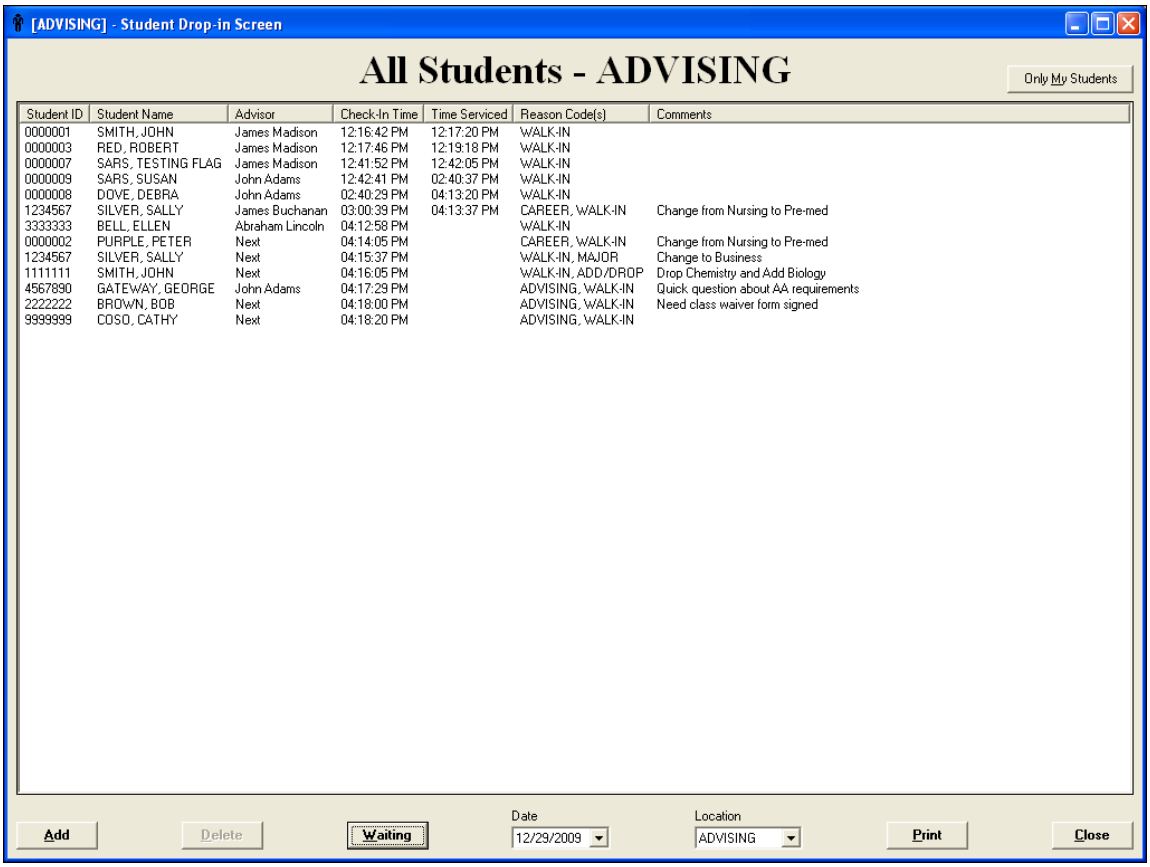


Student ID	Student Name	Advisor	Check-In Time	Time Serviced	Reason Code(s)	Comments
0000001	SMITH, JOHN	James Madison	12:16:42 PM	12:17:20 PM	WALK-IN	
0000003	RED, ROBERT	James Madison	12:17:46 PM	12:19:18 PM	WALK-IN	
0000007	SARS, TESTING FLAG	James Madison	12:41:52 PM	12:42:05 PM	WALK-IN	
0000009	SARS, SUSAN	John Adams	12:42:41 PM	02:40:37 PM	WALK-IN	
0000008	DOVE, DEBRA	John Adams	02:40:29 PM	04:13:20 PM	WALK-IN	
1234567	SILVER, SALLY	James Buchanan	03:00:39 PM	04:13:37 PM	CAREER, WALK-IN	Change from Nursing to Pre-med
3333333	BELL, ELLEN	Abraham Lincoln	04:12:58 PM		WALK-IN	
0000002	PURPLE, PETER	Next	04:14:05 PM		CAREER, WALK-IN	Change from Nursing to Pre-med
1234567	SILVER, SALLY	Next	04:15:37 PM		WALK-IN, MAJOR	Change to Business
1111111	SMITH, JOHN	Next	04:16:05 PM		WALK-IN, ADD/DROP	Drop Chemistry and Add Biology
4567890	GATEWAY, GEORGE	John Adams	04:17:29 PM		ADVISING, WALK-IN	Quick question about AA requirements
2222222	BROWN, BOB	Next	04:18:00 PM		ADVISING, WALK-IN	Need class waiver form signed
9999999	COSO, CATHY	Next	04:18:20 PM		ADVISING, WALK-IN	

The following additional information appears on the ALL STUDENTS screen:

- TIME SERVICED: Displays the time that the student is actually seen by the advisor.

For advisors, an additional view is available. A button in the upper-right hand corner toggles to permit the viewing of ALL STUDENTS or ONLY MY STUDENTS. Here is an example:



Student ID	Student Name	Advisor	Check-In Time	Time Serviced	Reason Code(s)	Comments
0000001	SMITH, JOHN	James Madison	12:16:42 PM	12:17:20 PM	WALK-IN	
0000003	RED, ROBERT	James Madison	12:17:46 PM	12:19:18 PM	WALK-IN	
0000007	SARS, TESTING FLAG	James Madison	12:41:52 PM	12:42:05 PM	WALK-IN	
0000009	SARS, SUSAN	John Adams	12:42:41 PM	02:40:37 PM	WALK-IN	
0000008	DOVE, DEBRA	John Adams	02:40:29 PM	04:13:20 PM	WALK-IN	
1234567	SILVER, SALLY	James Buchanan	03:00:39 PM	04:13:37 PM	CAREER, WALK-IN	Change from Nursing to Pre-med
3333333	BELL, ELLEN	Abraham Lincoln	04:12:58 PM		WALK-IN	
0000002	PURPLE, PETER	Next	04:14:05 PM		CAREER, WALK-IN	Change from Nursing to Pre-med
1234567	SILVER, SALLY	Next	04:15:37 PM		WALK-IN, MAJOR	Change to Business
1111111	SMITH, JOHN	Next	04:16:05 PM		WALK-IN, ADD/DROP	Drop Chemistry and Add Biology
4567890	GATEWAY, GEORGE	John Adams	04:17:29 PM		ADVISING, WALK-IN	Quick question about AA requirements
2222222	BROWN, BOB	Next	04:18:00 PM		ADVISING, WALK-IN	Need class waiver form signed
9999999	COSO, CATHY	Next	04:18:20 PM		ADVISING, WALK-IN	

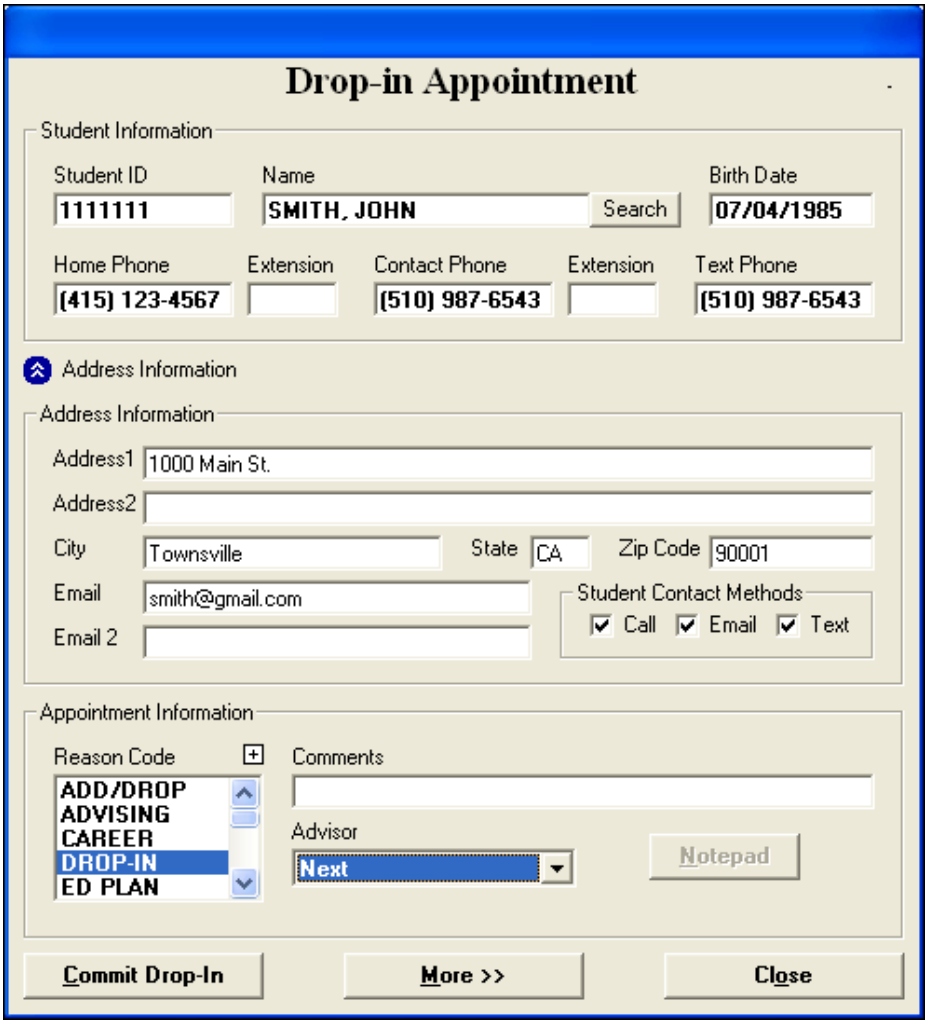
The following additional information appears on the ALL STUDENTS screen:

- TIME SERVICED: Displays the time that the student was actually seen.
- ALL STUDENTS/ONLY MY STUDENTS: Use this toggle button to display either all students who have signed in during the day (ALL STUDENTS) or only those students already seen by the current advisor who has signed on to the Drop-In screen (ONLY MY STUDENTS).

When the Drop-in screen is minimized on PCs using Windows XP, the number of students waiting will be displayed on the Task Bar. To display the number of students waiting on the Task Bar on PCs using Windows 7, right click on the Task Bar and select PROPERTIES. Then select NEVER COMBINE.

The DROP-IN APPOINTMENT SCREEN is displayed when clicking on ADD or when double-clicking on a name on the Drop-in List.

Here is an example of the screen with the MORE>> view hidden:



The options are:

- STUDENT INFORMATION:

STUDENT ID:	Use to record the student's identifier (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID). The **F9** function key toggles the field to accept other ID formats, if they are being used by the Location. In such a case, the field name will display the selected ID format.
NAME:	Use to record the student's name.
SEARCH:	Use to search for a Student Name or ID.
BIRTH DATE:	Use to record the student's date of birth.
HOME PHONE:	Use to record the student's permanent telephone number.
EXTENSION:	Use to record the extension to the permanent telephone number.

CONTACT PHONE:	Use to record the student's contact telephone number.
EXTENSION:	Use to record the extension to the contact telephone number.
TEXT PHONE:	Use to record the cell phone number that has text messaging capabilities.

- ADDRESS INFORMATION:

ADDRESS 1:	Use to record the student's primary street address.
ADDRESS 2:	Use to record the student's secondary street address.
CITY:	Use to record the city of the student's address.
STATE:	Use to record the state of the student's address.
ZIP CODE:	Use to record the zip code of the student's address.
EMAIL:	Use to record the student's e-mail address.
EMAIL 2:	Use to record a second email address for the student, if applicable.

- STUDENT CONTACT METHODS: Use to select the acceptable method(s) for contacting the student. Any combination, all or none may be selected.

CALL:	Use to select the option to call the student by telephone. This option is <u>required</u> if SARS·CALL will be used to make automated telephone calls for appointment reminders or other messages.
EMAIL:	Use to specify that the student may be contacted via e-mail. This option is <u>required</u> if SARS·CALL will be used to send email messages for appointment reminders or other notices.
TEXT:	Use to specify that the student may be contacted via text messaging.

- APPOINTMENT INFORMATION:

REASON CODE:	Use to represent the purpose for making a specific appointment.
+:	Use to display a screen showing all Reason Codes at a glance and to select one or more codes from that screen.
COMMENTS:	Use to enter specific information about the reason for making an appointment.
ADVISOR:	Use to select the advisor with whom the drop-in appointment is being made.

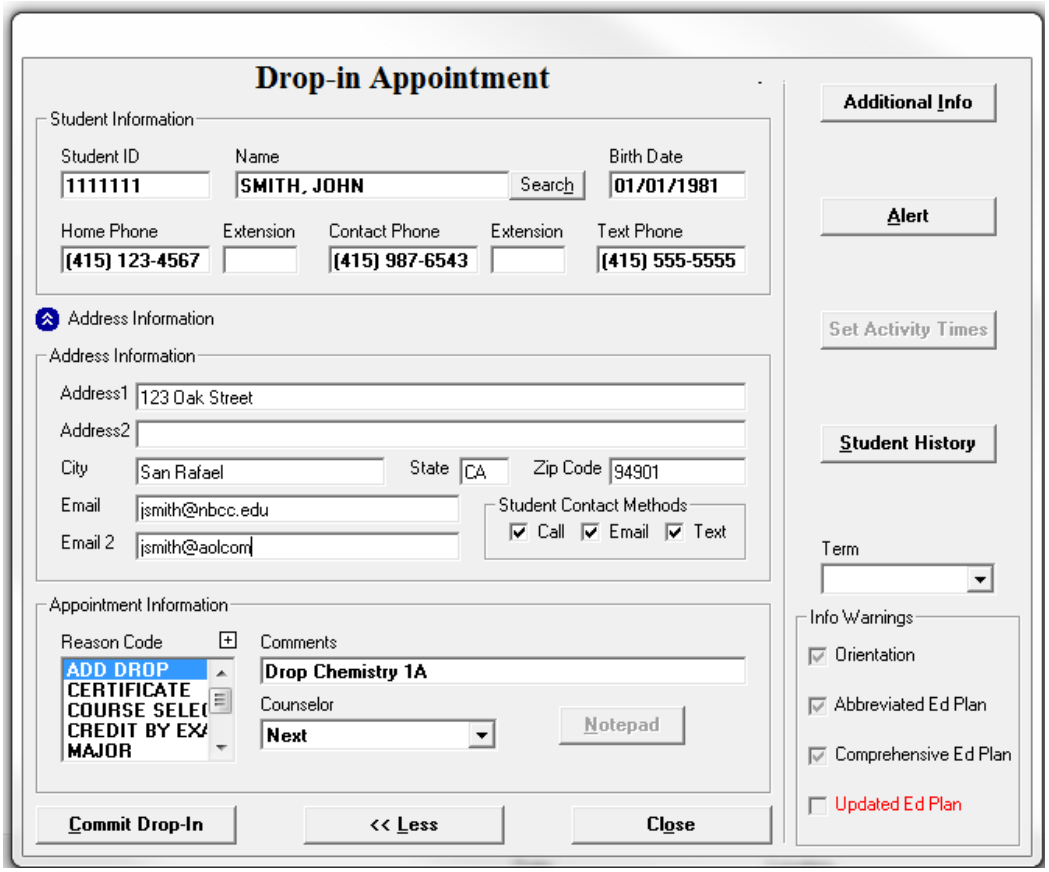
NOTEPAD: Use to write a note about the student. [Activated only after the advisor has selected the student.]

- COMMIT DROP-IN: Use to obligate the appointment. [Activated only after the scheduler has entered a student's ID and moved to the next field.]

- MORE>>/<<LESS: Use to display the additional options section on the right-hand side of the screen. MORE>> is a toggle button. After it is clicked, the button is renamed <<LESS.

- CLOSE: Use to exit the screen.

Other options are available for use by clicking on MORE>>. The screen will look like this when the screen is fully expanded:



These options include the following:

- ADDITIONAL INFO: Use to view, and if permitted, to record responses to pre-established questions that will provide more detailed information about the student. [May be available if the Location has opted to include this feature.]

- ALERT: Use to enter or display a message that is viewable by advisors or schedulers.

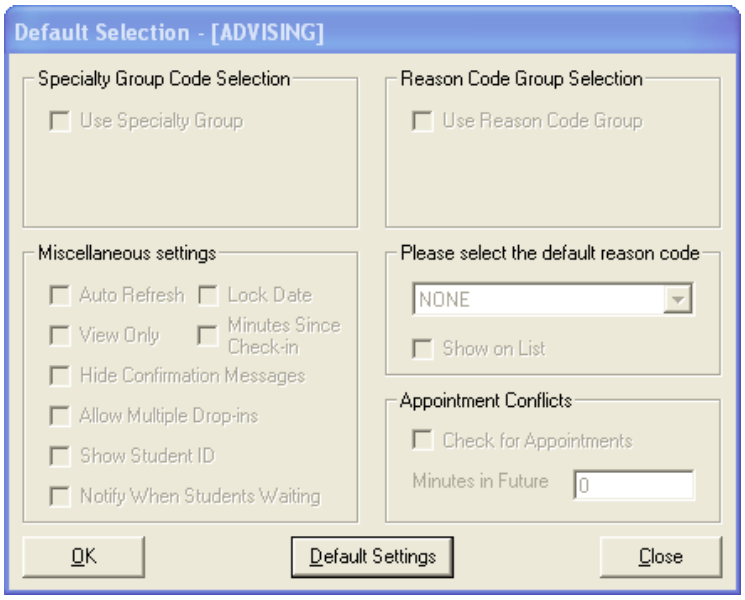
- SET ACTIVITY TIMES: [Enabled for any individual booked appointment if attendance has been marked YES] Use to set the actual start time and stop time of the appointment.
- STUDENT HISTORY: Use to gain access to the STUDENT HISTORY screen containing all appointment and drop-in history for the selected student, as well as a history of all answered eAdvising questions.
- TERM: [Available if SHOW TERM LIST has been selected on the Miscellaneous Settings screen for this Location] Use to link the topic of the current appointment to a different term, as opposed to the current term (e.g., discussion of an Ed Plan for the next semester).
- INFO FLAGS: Use to display up to four Additional Information questions about the student, if they have been selected using the separate ADDINFO FLAG utility. (See "Select Additional Info Flags for Display on the Student Appointment and Drop-in Screens" at Section 5.5.6.)

14.1 Configure the Drop-In Screen

14.1.1 Initial Configuration Steps (System Administrator)

The system administrator for a Location must first configure the default settings. This is a one-time process, unless changes to the default settings are required, and may be performed at any computer used in the selected Location. The settings will apply globally to all computers using the Drop-in feature for that Location.

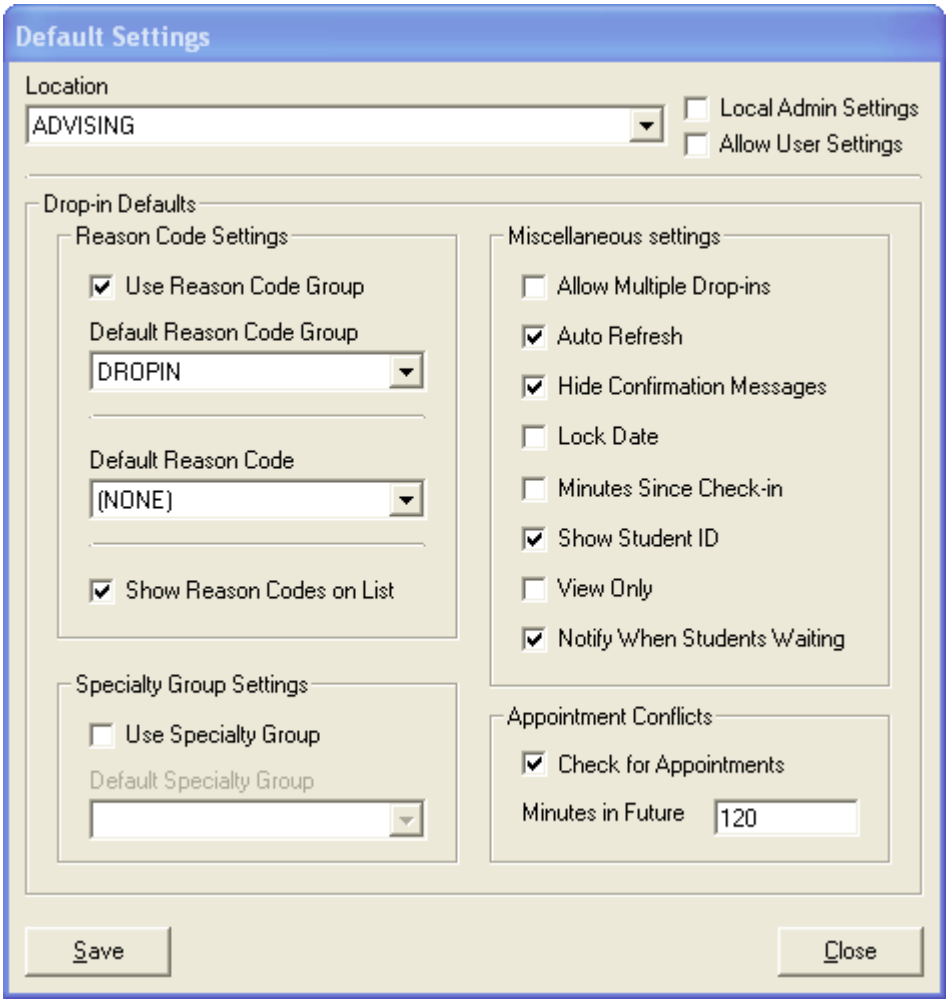
1. Upon initially clicking on the DROP-IN option on the SARS·MENU, a DEFAULT SELECTION screen for your primary Location will be displayed. All options will be disabled, except for the three buttons at the bottom of the screen. It will look like this:



The options are:

- DEFAULT SETTINGS: [Activated only for system administrators with the following access permissions: UTIL – ACCESS and UTIL – TABLE MAINTENANCE] Use to gain access to the Default Settings screen to (1) establish whether users may change settings on the DEFAULT SELECTION screen, (2) establish the desired default settings for the selected Location, and (3) establish an option by which the system administrator can individualize a user's PC.
- OK: Use to save the changes made on the screen.
- CLOSE: Use to exit the screen.

2. Click on DEFAULT SETTINGS to display the DEFAULT SETTINGS screen. Here is an example:



The options are:

- LOCATION: Use to select the location for which these default settings will be applicable.

- LOCAL ADMIN SETTINGS: Use to allow the system administrator to make changes to the Drop-in settings on a selected workstation for a specific user logon. The changes are made on the DEFAULT SELECTION screen. This option requires that the system administrator and the designated user(s) work together at the PC.

- ALLOW USER SETTINGS: Use to specify that users who do not have system administration access rights will be able to select alternate settings from the DEFAULT SELECTION screen for their own PC.

- REASON CODE SETTINGS:

  USE REASON CODE GROUP: Use to activate the option to use REASON CODE GROUPS.

    DEFAULT REASON CODE GROUP: [Enabled if Use Reason Code Group is checked] Use to select the Reason Code Group in order to limit the choice of reasons on the STUDENT DROP-IN SCREEN. Only those Reason Codes that are assigned to the selected DEFAULT REASON CODE GROUP will be displayed.

  DEFAULT REASON CODE: Use to select the Reason Code that will be inserted automatically when a student registers. If no Default Reason Code is desired, select (NONE) from the top of the menu.

  SHOW REASON CODES ON LIST: Use to display Reason Codes on the Drop-in Screen. If this option is checked, another column will be placed on the screen with the title "Reason Code(s)."

- SPECIALTY GROUP SETTINGS:

  USE SPECIALTY GROUP: Use to activate the option to use SPECIALTY CODE GROUPS.

    DEFAULT SPECIALTY GROUP: [Enabled if USE SPECIALTY GROUP is checked] Use to select the code to be used as the default (e.g., DROPIN). Only those advisors who have been assigned to that group will be displayed on the DROP-IN APPOINTMENT screen.

- MISCELLANEOUS SETTINGS

  ALLOW MULTIPLE DROP-INS: Use to allow a student to be listed on the waiting list more than once in cases where the student may have more than one consecutive drop-in session.

AUTO REFRESH:	Use to update the display on the STUDENT DROP-IN SCREEN automatically every 30 seconds. If not selected, the screen will be updated only when the user presses **F5** or when the PC is used to add or select a student to be seen.
HIDE CONFIRMATION MESSAGES:	Use to eliminate the confirmation messages that are usually displayed when a student is being added to or selected from the list.
LOCK DATE:	Use to lock the screen to display only the current date.
MINUTES SINCE CHECK-IN:	Use to display elapsed time since check-in, rather than the student's check-in time.
SHOW STUDENT ID:	Use to allow a student's primary identifier to be displayed on the Drop-in screen (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).
VIEW ONLY:	Use to prevent users on the PC from taking any action on the STUDENT DROP-IN SCREEN other than viewing the list of students. This will override any scheduling access rights that a user may have.
NOTIFY WHEN STUDENTS WAITING:	Use to have the system flash the title bar on the Drop-in Screen, if it is not the active window on the advisor's computer, when the student has been added to the Drop-in List. If the Drop-in Screen is inactive or minimized, the button on the task bar will flash. AUTO REFRESH must be checked for this feature to be functional.
• APPOINTMENT CONFLICTS:	Use to establish settings so that the system will check for and warn about a pending appointment(s) that a student might miss because it conflicts with the drop-in visit.
CHECK FOR APPOINTMENTS:	Use to have the system check for any booked appointments that will potentially conflict with this drop-in activity, based on the time that the student is being added to the Drop-in screen and the setting for Minutes in Future.
MINUTES IN FUTURE:	Use in conjunction with Check for Appointments. The purpose of this feature is to trigger a warning message if an appointment exists for the student in any Location within the database that would conflict with the current drop-in visit. Use to specify the number of minutes beyond the present time to check for any conflicts (e.g., 120 minutes).
• SAVE:	Use to save the changes made on the screen.

- CLOSE: Use to exit the screen.

3. Click on LOCATION ▼ and select the location for which these default settings will apply.

4. [Optional] Click on ALLOW USER SETTINGS only if users will be permitted to select different default settings directly on the DEFAULT SELECTION screen by enabling the fields. This option may be appropriate if the default settings would not be appropriate for all users in the Location. Any changes would affect only that user's computer associated with his or her Windows logon.

Note
Disregard the LOCAL ADMIN SETTINGS at this point. See Section 14.1.3, below.

5. In the Reason Code Settings panel,

   a. To limit the choice of Reason Codes on the DROP-IN APPOINTMENT screen, click on the USE REASON CODE GROUP checkbox. This will enable the Default Reason Code Group field.

   b. [Required if USE REASON CODE GROUP is checked] Click on DEFAULT REASON GROUP CODE ▼ and then select the code to be used as the default (e.g., DROPIN). Only those Reason Codes that have been assigned to that group will be displayed on the DROP-IN APPOINTMENT screen.

   c. [Required] Click on DEFAULT REASON CODE ▼ and then select the Reason Code (e.g., ADVISING) to be inserted automatically when a student registers. If no Default Reason Code is desired, select (NONE) from the top of the menu.

   d. Click on SHOW REASON CODES ON LIST to display Reason Codes on the Drop-in Screen.

6. In the Specialty Group Code Settings panel,

   a. To limit the choice of advisors on the DROP-IN APPOINTMENT screen, click on the USE SPECIALTY GROUP checkbox. This will enable the DEFAULT SPECIALTY GROUP field.

   b. [Required if USE SPECIALTY GROUP is checked] Then click on DEFAULT SPECIALTY GROUP▼ and select the code to be used as the default (e.g., DROPIN). Only those advisors who have been assigned to that group will be displayed on the DROP-IN APPOINTMENT screen.

7. In the MISCELLANEOUS SETTINGS panel,

   a. Click on ALLOW MULTIPLE DROP-INS to allow a student's name to be placed on the waiting list more than once. This allows the student to check in at one time for multiple drop-in sessions rather than having to re-check in after finishing the prior session. The option keeps the placement of the student's name at the original check-in time sequence. The default for this option is not to allow multiple drop-ins.

   b. Click on AUTO REFRESH to update the display on the STUDENT DROP-IN SCREEN automatically every 30 seconds. If this option is not selected, the display will be updated only when a scheduler presses **F5** or uses the PC to add or select a student.

   c. Click on HIDE CONFIRMATION MESSAGES to prevent confirmation messages from being displayed when a student is being added to or selected from the list.

d. Click on LOCK DATE to disable the Date field on the screen, causing it to display only the current date.

e. Click on MINUTES SINCE CHECK-IN to display the time that has elapsed since check-in in lieu of the student's check-in time.

f. Click on SHOW STUDENT ID to display the student's primary identifier on the Drop-in screen.

g. Click on VIEW ONLY to prevent users on the PC from taking any action on the STUDENT DROP-IN SCREEN other than viewing the list of students. (This option is set on a PC by PC basis.)

Warning
When VIEW ONLY is set on a PC, that option prevents users of that PC from adding students to the Drop-in list, even if they have that access right.

h. Click on NOTIFY WHEN STUDENTS WAITING to have the system flash the title bar on the Drop-in Screen, if it is not the active window on the advisor's computer, as well as the button on the task bar, when the student has been added to the Drop-in List. For this feature to be functional, the AUTO REFRESH setting must be checked as a default on the configuration settings for the Drop-in screen.

8. In the APPOINTMENT CONFLICTS panel,

   a. Click on CHECK FOR APPOINTMENTS to have the system check for pending appointments that might conflict with the drop-in visit.

   b. Click on the MINUTES IN FUTURE field and specify the number of minutes beyond the present time that the system should look for a scheduled appointment that might conflict with the drop-in visit (e.g., 120 minutes).

9. Click on SAVE to approve the selections.

Note
At least one option on the screen must be checked or unchecked and the settings saved, even if the options that are shown do not require any changes.

10. Click on CLOSE. You will be returned to the DEFAULT SELECTION screen, which will display the selections.

11. When done, click on CLOSE to return to the STUDENT DROP-IN SCREEN.

Note
If a computer is set up in a public area for use by advisors to view the STUDENT DROP-IN SCREEN and select a student to be seen, create a new Access Code (for example, View DI) with the sole permission to access THE GRID. Then, create a generic user name (for example, Public User) and assign a Short Name of NONE. (See "Add an Access Code" at Section 4.8.1 and "Add a User Name" at Section 4.9.1 in Part I.)

12. Repeat these configuration steps for all other Locations to which the system administrator has access.

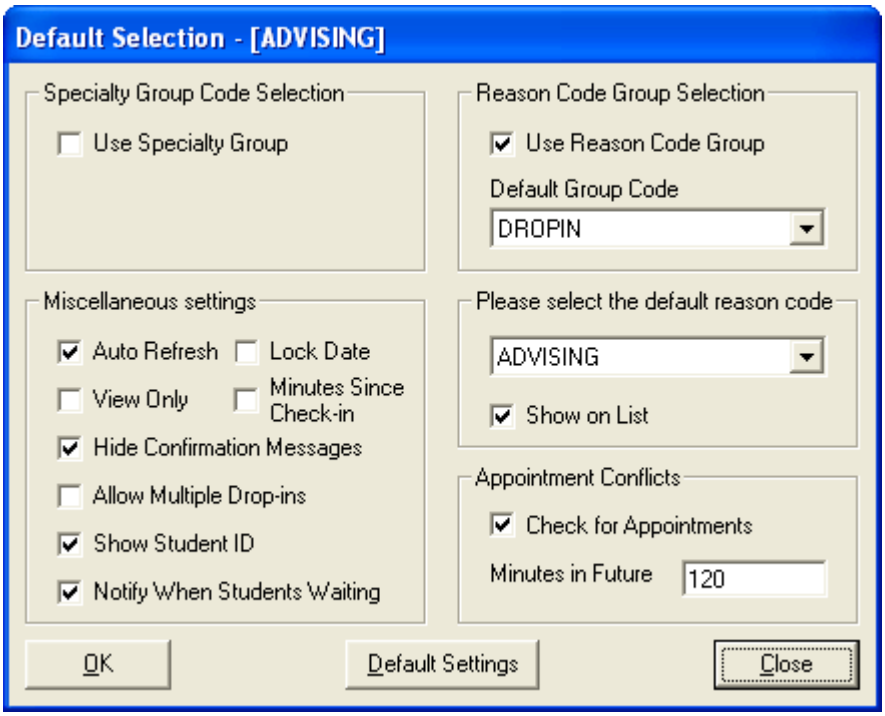
13. System administrators may change default settings as needed by following the same steps in this section.

14.1.2 Change Default Settings (Allow User Settings)

If the ALLOW USER SETTINGS option has been selected, users will be able to individualize the settings on their own PC. After the initial configuration of the Drop-In screen, users who do not have system administration rights may follow these steps if the default settings for the Drop-in screens for the desired Location have already been established.

1. Click on DROP-IN from the SARS·MENU.

2. Press **F6** to display the DEFAULT SELECTION screen. Here is an example:



The options are:

- SPECIALTY GROUP CODE SELECTION:

USE SPECIALTY GROUP:	Use to activate the option to use SPECIALTY CODE GROUPS.
DEFAULT GROUP CODE:	[Enabled if USE SPECIALTY GROUP is checked] Use to select the code to be used as the default (e.g., DROPIN). Only those advisors who have been assigned to that group will be displayed on the DROP-IN APPOINTMENT screen.

- REASON CODE GROUP SELECTION

USE REASON CODE GROUP:	Use to activate the option to use REASON CODE GROUPS.

DEFAULT GROUP CODE:	[Enabled if Use Reason Code Group is checked] Use to select the Reason Code Group in order to limit the choice of reasons on the STUDENT DROP-IN SCREEN. Only those Reason Codes that are assigned to the selected DEFAULT REASON CODE GROUP will be displayed.

- MISCELLANEOUS SETTINGS:

AUTO REFRESH:	Use to update the display on the STUDENT DROP-IN SCREEN automatically every 30 seconds. If not selected, the screen will be updated only when the user presses **F5** or when the PC is used to add or select a student to be seen.
VIEW ONLY:	Use to prevent users on the PC from taking any action on the STUDENT DROP-IN SCREEN other than viewing the list of students. This will override any scheduling access rights that a user may have.
HIDE CONFIRMATION MESSAGES:	Use to eliminate the confirmation messages that are usually displayed when a student is being added to or selected from the list.
ALLOW MULTIPLE DROP-INS:	Use to allow a student to be listed on the waiting list more than once in cases where the student may have more than one consecutive drop-in session.
SHOW STUDENT ID:	Use to allow a student's primary identifier to be displayed on the Drop-in screen (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).
NOTIFY WHEN STUDENTS WAITING:	Use to have the system flash the title bar on the Drop-in Screen, if it is not the active window on the advisor's computer when the student has been added to the Drop-in List. If the Drop-in Screen is inactive or minimized, the button on the task bar will flash. AUTO REFRESH must be checked for this feature to be functional.
LOCK DATE:	Use to lock the screen to display only the current date.
MINUTES SINCE CHECK-IN:	Use to display the time that has elapsed since check-in in lieu of the student's check-in time.

- PLEASE SELECT THE DEFAULT REASON CODE: Use to select the Reason Code that will be inserted automatically when a student registers.

SHOW ON LIST:	Use to display Reason Codes on the Drop-in Screen. If this option is checked, another column will be placed on the screen with the title "Reason Code(s)."

- APPOINTMENT CONFLICTS: Use to establish settings so that the system will check for and warn about a pending appointment(s) that a student might miss because it conflicts with the drop-in visit.

  CHECK FOR APPOINTMENTS: Use to have the system check for any booked appointments that will potentially conflict with this drop-in activity, based on the time that the student is being added to the Drop-in screen and the setting for Minutes in Future.

  MINUTES IN FUTURE: Use in conjunction with Check for Appointments. The purpose of this feature is to trigger a warning message if an appointment exists for the student in any Location within the database that would conflict with the current drop-in visit. Use to specify the number of minutes beyond the present time to check for any conflicts (e.g., 120 minutes).

- OK: Use to save the changes made on the screen.

- CLOSE: Use to exit the screen.

3. To limit the choice of advisors on the DROP-IN APPOINTMENT screen, click on the USE SPECIALTY GROUP checkbox. This will enable the Specialty Group Code field. Select the desired code. Only those advisors who have been assigned to that group will be displayed on the DROP-IN APPOINTMENT screen.

4. In the MISCELLANEOUS SETTINGS panel, making the following selections will change the default settings.

   a. Check AUTO REFRESH to update the display on the STUDENT DROP-IN SCREEN automatically every 30 seconds. If this option is not selected, the display will be updated only when a scheduler presses **F5** or uses the PC to add or select a student.

   b. Check VIEW ONLY to prevent users on the PC from taking any action on the STUDENT DROP-IN SCREEN other than viewing the list of students. (This option is set on a PC by PC basis.)

   Warning
   When VIEW ONLY is set on a PC, that option prevents users of that PC from adding students to the Drop-in list, even if they have that access right.

   c. Check HIDE CONFIRMATION MESSAGES to prevent confirmation messages from being displayed when a student is being added to or selected from the list.

   d. Check ALLOW MULTIPLE DROP-INS to allow a student's name to be placed on the waiting list more than once. This allows the student to check in at one time for multiple drop-in sessions rather than having to re-check in after finishing the prior session. The option keeps the placement of the student's name at the original check-in time sequence. The default for this option is not to allow multiple drop-ins.

e. Check SHOW STUDENT ID to display the student's primary identifier on the Drop-in screen.

f. Check NOTIFY WHEN STUDENTS WAITING to have the system flash the title bar on the advisor's computer (or the button on the task bar if SARS·CHAT is minimized) when the student has been added to the Drop-in List. For this feature to be functional, the AUTO REFRESH setting must be checked as a default on the configuration settings for the Drop-in screen.

g. Check LOCK DATE to disable the Date field on the Drop-in screen. Only the current date will be displayed in this mode.

h. Check MINUTES SINCE CHECK-IN to display the time that has elapsed since check-in in lieu of the student's check-in time.

5. In the Reason Code Group Selection panel,

   a. To limit the choice of Reason Codes on the DROP-IN APPOINTMENT screen, check the USE REASON CODE GROUP checkbox. This will enable the Default Group Code field.

   b. Select the desired Code (e.g., DROPIN). Only those Reason Codes that have been assigned to that group will be displayed on the DROP-IN APPOINTMENT screen.

6. In the next panel,

   a. Click on PLEASE SELECT THE DEFAULT REASON CODE ▼ and select the code to be used as the default (e.g., ADVISING) to be inserted automatically when a student registers. If no default code is desired, select (NONE) from the top of the menu.

   b. Check SHOW ON LIST to display Reason Codes on the Drop-in Screen.

7. In the APPOINTMENT CONFLICTS panel,

   a. Check CHECK FOR APPOINTMENTS to have the system checking for appointments that might conflict with the drop-in visit.

   b. Check MINUTES IN FUTURE field and specify the number of minutes beyond the present time that the system should look for a scheduled appointment that might conflict with the drop-in visit (e.g., 120 minutes).

8. Click on OK, and then click on CLOSE. The default settings will be established for that user's computer and Windows logon only.

14.1.3 Change Default Settings (Local Admin Settings)

If users are not permitted to change the defaults on the Default Selection screen, another option exists for allowing changes to be made to a selected workstation for specific user logons. This option may be desired for public area workstations. This option requires that the system administrator and the designated user(s) work together at the PC and follow the steps below:

1. The user logs onto his or her PC (using his or her network logon) and then allows the system administrator to take control.

2. The system administrator then signs into SARS·GRID on that PC using the system administrator's user name and password.

3. From the SARS·MENU, click on DROP-IN.

4. Press **F6** to display the Default Selection screen.

5. Click on DEFAULT SETTINGS.

6. Select the desired Location.

7. Click on LOCAL ADMIN SETTINGS.

8. Click on SAVE to return to the Default Selection screen, which will now contain active fields.

9. Proceed to individualize the settings. These settings will be effective on this workstation only, and only for the user who logged on in step 1, above.

10. Click on OK.

11. Click on CLOSE.

12. Repeat steps 1 through 11 for any other users for whom the workstation should be individualized.

13. For security purposes, the system administrator must remember to sign out of SARS·GRID.

SECTION 15 — THE STUDENT HISTORY SCREEN

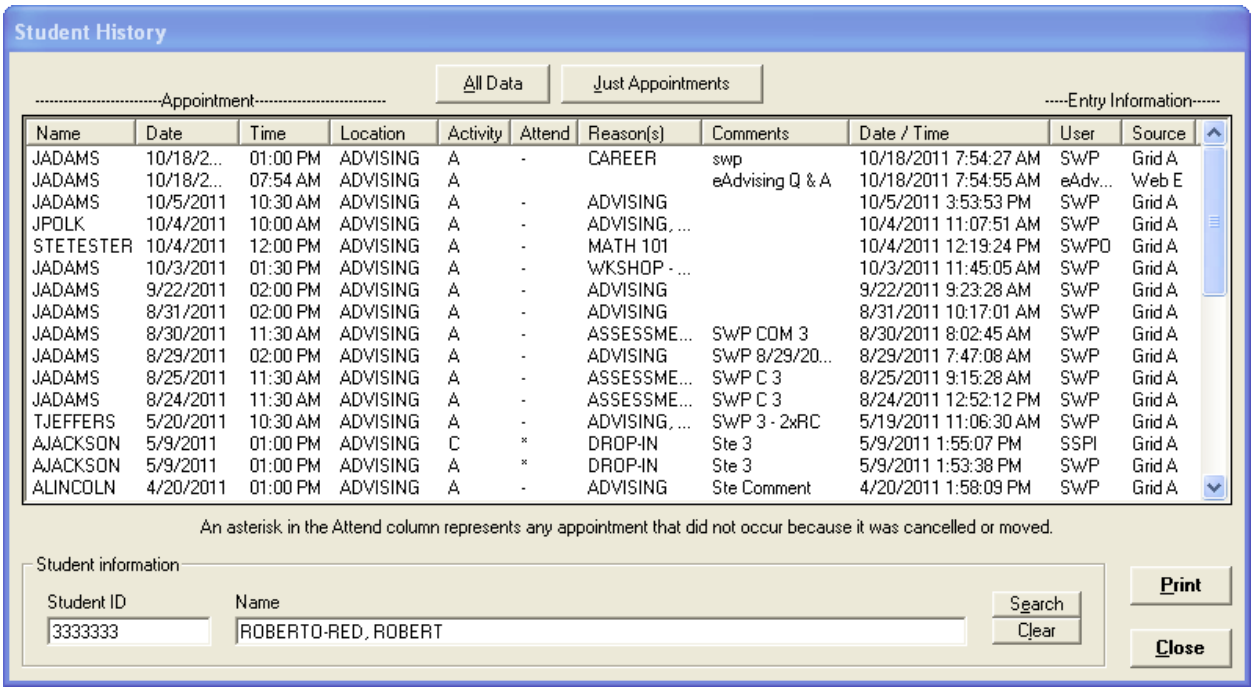
15.0 Overview

This section introduces the Student History screen and describes how to view and print student history from either a booked appointment or an un-booked cell.

The Student History screen is used to locate a student's existing appointments and drop-in visits and to view or print the appointment and drop-in history for a student back to the earliest date established by the system administrator (see Location Maintenance, GRID Settings, in Section 4.3). It may also be used to cancel a student appointment. Finally, it may be used, in the All Data mode, to view a list of all of a student's eAdvising messages that have been answered.

Appointment and drop-in activity will appear on the list in reverse chronological order. Appointment information includes the name of the advisor, the date of the appointment, the time of the appointment, the location (department), the type of activity (**A** represents a booked appointment or an eAdvising response, **M** represents a moved appointment, and **C** represents a cancelled appointment), the attendance status, the reason(s) for the appointment and any comments. It also displays the date/time that the scheduling action was taken and the initials, user name or other identifier of the person who took the action. The Source column will display whether the activity was made from THE GRID or from SARS·TRAK or from the web interface (e·SARS). **GridA** represents an Appointment, **GridD** represents Dropin, and **WebE** represents an eSARS appointment or an eAdvising response.

Here is an example of the screen layout.



Name	Date	Time	Location	Activity	Attend	Reason(s)	Comments	Date / Time	User	Source
JADAMS	10/18/2...	01:00 PM	ADVISING	A	-	CAREER	swp	10/18/2011 7:54:27 AM	SWP	Grid A
JADAMS	10/18/2...	07:54 AM	ADVISING	A			eAdvising Q & A	10/18/2011 7:54:55 AM	eAdv...	Web E
JADAMS	10/5/2011	10:30 AM	ADVISING	A	-	ADVISING		10/5/2011 3:53:53 PM	SWP	Grid A
JPOLK	10/4/2011	10:00 AM	ADVISING	A	-	ADVISING, ...		10/4/2011 11:07:51 AM	SWP	Grid A
STETESTER	10/4/2011	12:00 PM	ADVISING	A	-	MATH 101		10/4/2011 12:19:24 PM	SWPO	Grid A
JADAMS	10/3/2011	01:30 PM	ADVISING	A	-	WKSHOP - ...		10/3/2011 11:45:05 AM	SWP	Grid A
JADAMS	9/22/2011	02:00 PM	ADVISING	A	-	ADVISING		9/22/2011 9:23:28 AM	SWP	Grid A
JADAMS	8/31/2011	02:00 PM	ADVISING	A	-	ADVISING		8/31/2011 10:17:01 AM	SWP	Grid A
JADAMS	8/30/2011	11:30 AM	ADVISING	A	-	ASSESSME...	SWP COM 3	8/30/2011 8:02:45 AM	SWP	Grid A
JADAMS	8/29/2011	02:00 PM	ADVISING	A	-	ADVISING	SWP 8/29/20...	8/29/2011 7:47:08 AM	SWP	Grid A
JADAMS	8/25/2011	11:30 AM	ADVISING	A	-	ASSESSME...	SWP C 3	8/25/2011 9:15:28 AM	SWP	Grid A
JADAMS	8/24/2011	11:30 AM	ADVISING	A	-	ASSESSME...	SWP C 3	8/24/2011 12:52:12 PM	SWP	Grid A
TJEFFERS	5/20/2011	10:30 AM	ADVISING	A	-	ADVISING, ...	SWP 3 - 2xRC	5/19/2011 11:06:30 AM	SWP	Grid A
AJACKSON	5/9/2011	01:00 PM	ADVISING	C	*	DROP-IN	Ste 3	5/9/2011 1:55:07 PM	SSPI	Grid A
AJACKSON	5/9/2011	01:00 PM	ADVISING	A	*	DROP-IN	Ste 3	5/9/2011 1:53:38 PM	SWP	Grid A
ALINCOLN	4/20/2011	01:00 PM	ADVISING	A	-	ADVISING	Ste Comment	4/20/2011 1:58:09 PM	SWP	Grid A

The following options appear on this screen:

- ALL DATA: Use to display all scheduled, cancelled, moved, and extended appointments and drop-in visits, as well as all eAdvising questions.
- JUST APPOINTMENTS: Use to exclude appointments and drop-in visits that did not occur because they were cancelled or moved. eAdvising questions are not included in the Just Appointments mode.
- STUDENT INFORMATION: Use to display or enter identifying information about a student.

  ID: Use to display or enter the student's identifier.

  NAME: Use to display or enter the student's name.

  SEARCH: Use to find a student whose ID is not known.

  CLEAR: Use to clear the STUDENT HISTORY screen for another entry in ID or NAME.
- PRINT: Use to print the STUDENT HISTORY REPORT for the selected student.
- CLOSE: Use to exit the screen.

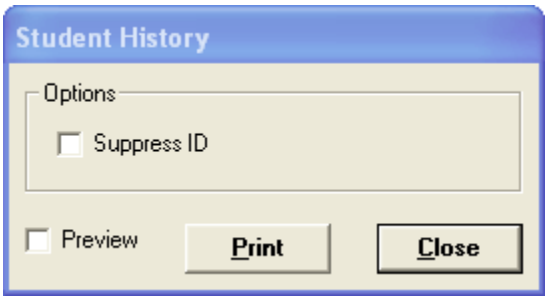
15.1 View and Print Student History from a Booked Appointment

1. With the focus on the cell on THE GRID or row on MY GRID containing an individual appointment, click on STUDENT HISTORY. A list of appointment activity for that student will be displayed.

2. The STUDENT HISTORY screen defaults to ALL DATA. Appointments marked with an asterisk in the Attend column represent appointments that did not occur because they were cancelled or moved. To view only those appointments that actually existed, click on JUST APPOINTMENTS.

   Tip
   If the screen displays multiple reasons, all of the reasons may be viewed by resizing the Reason(s) column.

3. To print the STUDENT HISTORY REPORT, click on PRINT. A screen will be displayed providing the option to suppress the student's ID. Here is an example:



a. If desired, click on SUPPRESS ID.

b. Click on PREVIEW and then on or just click on PRINT.

c. Click on CLOSE.

4. To clear the screen for another entry in ID or NAME, click on CLEAR. Then enter a new name and click on SEARCH or enter the student's ID.

5. To cancel an appointment that appears on the STUDENT HISTORY, double-click on the appointment to be cancelled. The Student Appointment Screen will be displayed and the cancellation can be made.

6. When done, click on CLOSE.

15.2 View and Print Student History from an Un-booked Cell

1. With the focus on any un-booked cell on THE GRID or un-booked row on MY GRID, click on STUDENT HISTORY.

   a. Select one of the options below to enter the student's identifier.

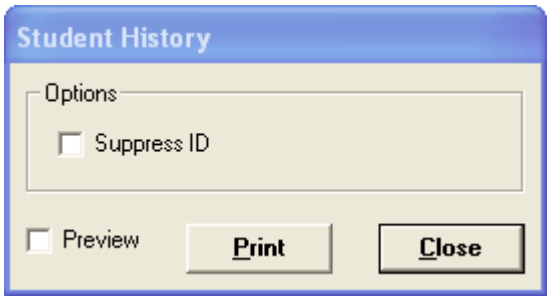
   - Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).
   - If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.
   - If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in Part IV, Section 19.2, or Part V, Section 34.2.
   - If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

   Note
   The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

2. The STUDENT HISTORY screen defaults to ALL DATA. Appointments marked with an asterisk in the Attend column represent appointments that did not occur because they were cancelled or moved. To view only those appointments and drop-in visits that actually existed, click on JUST APPOINTMENTS.

   Tip
   If the screen displays multiple reasons, all of the reasons may be viewed by resizing the Reason(s) column

3. To print the STUDENT HISTORY REPORT, click on PRINT. A screen will be displayed providing the option to suppress the student's ID. Here is an example:



   a. If desired, click on SUPPRESS ID.

   b. Click on PREVIEW or click on PRINT.

   c. Click on CLOSE.

4. Click on OK.

5. To clear the screen for another entry in ID or NAME, click on CLEAR. Then enter a new name and click on SEARCH or enter a new identifier.

6. To cancel an appointment that appears on the STUDENT HISTORY screen, double-click on the appointment to be cancelled. The Student Appointment Screen will be displayed and the cancellation can be made.

7. When done, click on CLOSE.

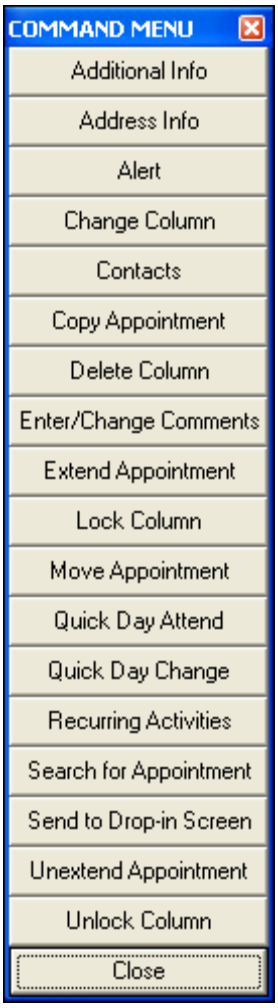
SECTION 16 — THE COMMAND MENU

16.0 Overview

This section introduces the Command Menu and discusses how to perform actions using the Command Menu.

The Command Menu is used to obtain a list of commands that enable the user to perform a specific scheduling function that involves something other than just making or canceling an appointment. The Command Menu pops up when you right click anywhere within THE GRID or MY GRID.

If the user has full access rights, the Command Menu will look like this:



From THE GRID or MY GRID, the Command Menu allows you to work with the following selections:

- ADDITIONAL INFO: Use to view and, if permitted, to record responses to pre-established questions that will provide more information

about the student. [This option may be available if the Location has opted to include this feature.]

- ADDRESS INFO: Use to view, enter or change a student's address and e-mail information.
- ALERT: Use to display or enter a message that is viewable by advisors, or by schedulers who have access to this Location.
- CHANGE COLUMN: [This option will be enabled if the user has been granted THE GRID or MY GRID – CHANGE SCHEDULE CODES (APPOINTMENT ALLOWABLE and NON-APPOINTMENT ALLOWABLE)] access rights.] Use to change part or all of a column on THE GRID or MY GRID to the same Schedule Code, or to reset an entire column to the corresponding column on the advisor's Master Schedule.
- CONTACTS: Use to keep a count of the number of informal student contacts made each day in addition to appointments and drop-in visits.
- COPY APPOINTMENT: [This option will be enabled only if the user has been granted THE GRID or MY GRID – SCHEDULE APPOINTMENTS access rights, and, in addition, only when the focus is on a booked appointment.] Use to apply existing student appointment information to other appointment slots when scheduling recurring appointments. This feature is particularly useful for any work unit that meets with a student on several occasions for the same reason and wants to schedule all or most of the appointments in one scheduling session. The option may be used when the recurring appointment is with different advisors, days of the week or times.
- DELETE COLUMN: Use to delete a column from THE GRID.
- ENTER/CHANGE COMMENTS: Use to enter, change or view any specific information about the activity designated by the cell on THE GRID.
- EXTEND APPOINTMENT: [This option will be enabled only if the user has been granted THE GRID or MY GRID – SCHEDULE APPOINTMENTS access rights, and, in addition, only when the focus is on a booked appointment.] Use to make a booked appointment longer.
- LOCK COLUMN: Use to lock a column on THE GRID to make a date unavailable for scheduling.
- MOVE APPOINTMENT: [This option will be enabled only if the user has been granted THE GRID or MY GRID – SCHEDULE APPOINTMENTS access rights, and, in addition, only when the focus is on a booked appointment.] Use to move a scheduled appointment to another appointment slot.

- QUICK DAY ATTEND: [This option will be enabled if the user has been granted THE GRID or MY GRID – RECORD ATTENDANCE access rights.] Use to record attendance for several same-date student appointments in one step.
- QUICK DAY CHANGE: [This option will be enabled only if the user has been granted THE GRID or MY GRID – CHANGE SCHEDULE CODES (APPOINTMENT ALLOWABLE and NON-APPOINTMENT ALLOWABLE) access rights]. Use to change an advisor's schedule after it has been added to THE GRID.
- RECURRING ACTIVITIES: Use to schedule recurring appointments or meetings for a single advisor for the same day of the week and time.
- SEARCH FOR APPOINTMENT: [This option will be enabled only if the user has been granted THE GRID or MY GRID – SCHEDULE APPOINTMENTS access rights] Use to find a list of available appointments that satisfy the student's preferences.
- SEND TO DROP-IN SCREEN: [Enabled only when the focus is on an individual booked appointment.] Use to either copy or move a selected student to the Drop-in Screen for a drop-in visit.
- UNEXTEND APPOINTMENT: [This option will be enabled only if the user has been granted THE GRID or MY GRID – SCHEDULE APPOINTMENTS access rights, and, in addition, only when the focus is on a booked appointment.] Use to shorten an extended appointment one cell at a time.
- UNLOCK COLUMN: Use to unlock a column that has been locked.
- CLOSE: Use to exit the screen.

16.1 Perform Actions Using the Command Menu

Warning
The cursor must first be focused on the cell for which the action will be taken. To set the focus, click on the cell with the left mouse button. Failure to click on the proper cell will result in the action being taken for the incorrect cell.

1. Left-click to place the focus on the cell on THE GRID or the row on MY GRID.
2. Press the right mouse button (right-click) to display the COMMAND MENU.
3. Left-click on the selected command to execute the action.
4. To exit without selecting a command, click on CLOSE.

Note
If one or more buttons on the COMMAND MENU is disabled, the user has not been granted permission to use the feature or, in the case of Additional Information, the feature may not have been set up by the system administrator for this Location.

SECTION 17 — INSTANT MESSAGING (SARS·CHAT)

17.0 Overview

Users can send and receive messages if the SARS·CHAT feature has been established for the database. In addition, if Enable Notification of Appointment Arrival has been established for the Location, advisors will receive automated messages that students have arrived via Instant Messaging.

This section discusses the following activities:

17.1 Configure Instant Messaging on an Individual Workstation

17.2 Send a Message

17.3 Respond to a Message

17.4 Broadcast a Message

In order for this feature to work properly, each user must have logged on to SARS·GRID at his/her assigned PC with his/her own User Name and Password. A flashing lightning bolt accompanied by a flashing red-colored X indicates a network communications problem. Wait five minutes or so to see if the problem clears. If the problem continues, see your System Administrator.

17.1 Configure Instant Messaging on an Individual Workstation

The standard format for Instant Messaging associated with SARS·GRID is for a pop-up message to be displayed on a user's screen and an audible beep to be sounded while the SARS·GRID program is active. Certain settings may be individualized on a PC-by-PC basis:

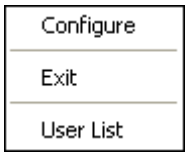
- Instead of a pop-up message, the lightning bolt icon on the lower Task Bar will flash when a message is received. (The tool tip for the icon is "SARS·GRID – Chat.") The user would then need to click on the flashing lightning bolt to display the message.
- The Instant Messaging feature may be configured to operate even when the SARS·GRID menu is closed. This feature is called "Launch With Windows."
- The user can select the type of Notification Sound from a menu.
- The user can choose the option to have the notification sound only once or repeatedly until the message is selected to be read.

Note
Instant Messaging works only when the SARS·GRID menu is open unless you select "Launch With Windows," which will make Instant Messaging available at all times.

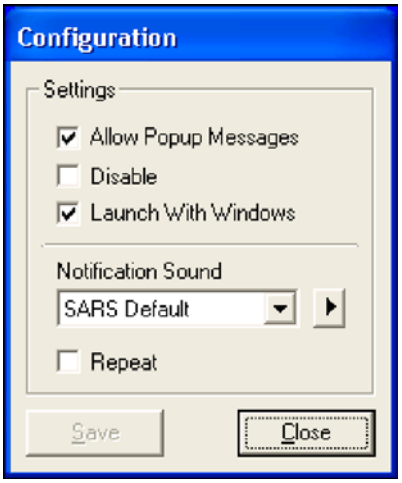
To change the default settings, follow the steps below:

1. Log on as the user for whom messages are to be received.

2. Right-click on the lightning bolt icon displayed on the task bar. The following screen is displayed:



3. Click on CONFIGURE to display the Configuration screen. Here is an example:



4. Check on ALLOW POPUP MESSAGES to have the message notification displayed on the screen.

   -or-

   Leave ALLOW POPUP MESSAGES unchecked to only have the lightning bolt flash when an incoming message is received.

5. [optional] Check DISABLE to prevent any notifications from being sent or received on the individual workstation being configured. The lightning bolt will still be displayed, but the user will not be able to send or receive chat messages.

   Note To reactivate this feature, see your System Administrator.

   -or-

   Leave DISABLE unchecked to allow the PC to communicate with the Chat server.

6. Check on LAUNCH WITH WINDOWS to receive messages even if the SARS·GRID menu is not actively running on the PC.

   -or-

   Leave LAUNCH WITH WINDOWS unchecked to receive messages <u>only</u> when the SARS-GRID menu is open.

Warning
It is strongly recommended that the LAUNCH WITH WINDOWS option not be activated when different users share the same PC and do not have their own unique Windows logon.

7. Click on NOTIFICATION SOUND ▼ to select the desired sound from the drop down menu.

Tip
Click on the arrow facing to the right of the menu to preview the sound.

8. Click on the checkbox adjacent to REPEAT to have the notification sound continue until the user responds to the message, or leave it unchecked to have the notification sound only once.

9. Click on SAVE.

Note
When the LAUNCH WITH WINDOWS option is activated, messages will arrive only for the advisor who has checked the LAUNCH WITH WINDOWS option**.** If that advisor later leaves the office and another advisor uses the same PC, the new advisor will not receive message notifications, since the program is set to recognize the initial user who logged on. To correct this problem, the new advisor must follow these steps:

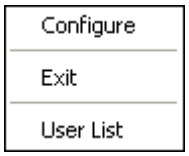
- Log off the server.
- Log on to the server.
- Right-click on the lightning bolt icon displayed on the Task Bar.
- Click on EXIT.
- Log on to SARS·GRID. Instant messaging will now be enabled for the new user.

17.2 Send a Message

TO SEND A MESSAGE, follow the steps below:

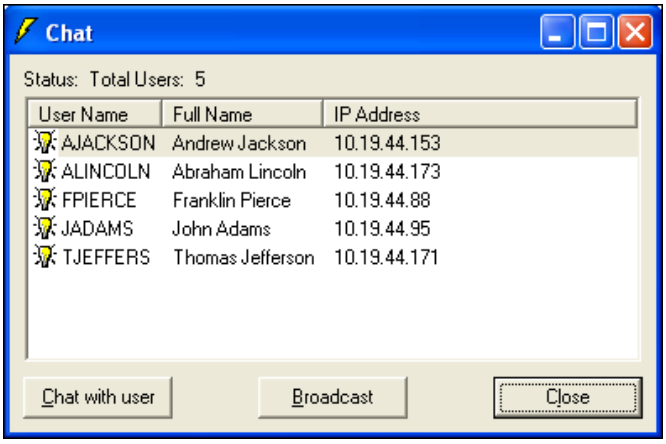
1. Log on as the user for whom messages are to be sent.

2. Right-click on the lightning bolt icon displayed on the task bar. The following menu will be displayed:



3. Click on USER LIST to display a Chat screen showing the users on the system.

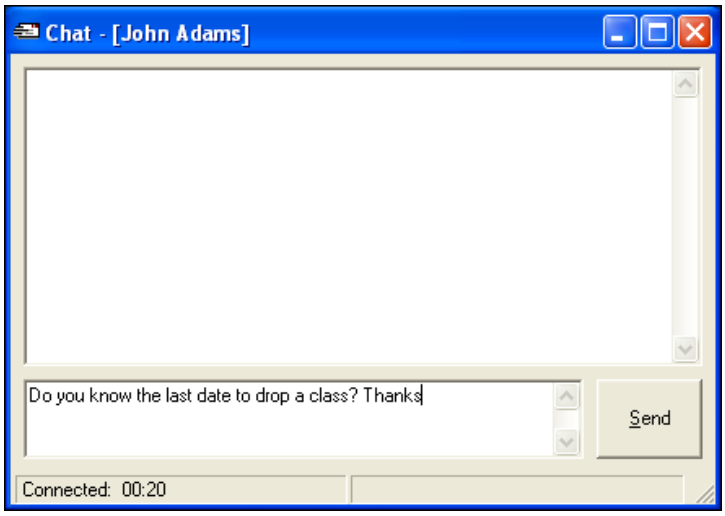
Here is an example:



a. Click on the individual to whom the message will be sent.

b. Click on the CHAT WITH USER button.

c. Click in the MESSAGE panel and type in the message to be sent. Here is an example:



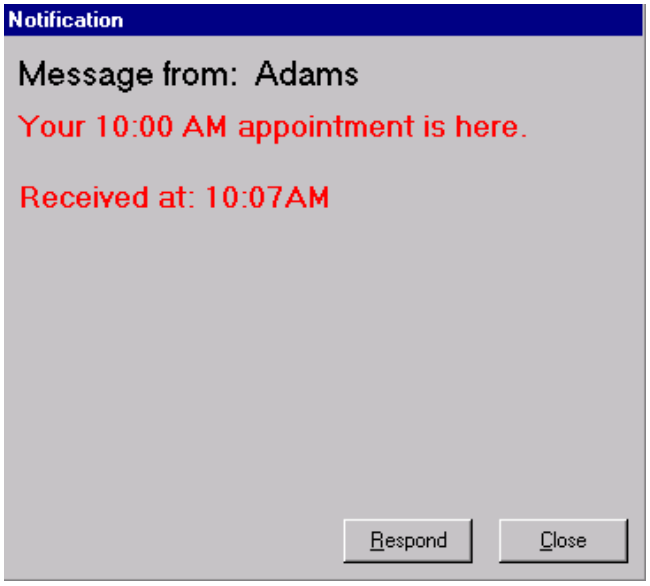
d. When done, click on SEND. The message will be sent immediately.

e. To close the Chat screen, click on the X at the upper right of the screen.

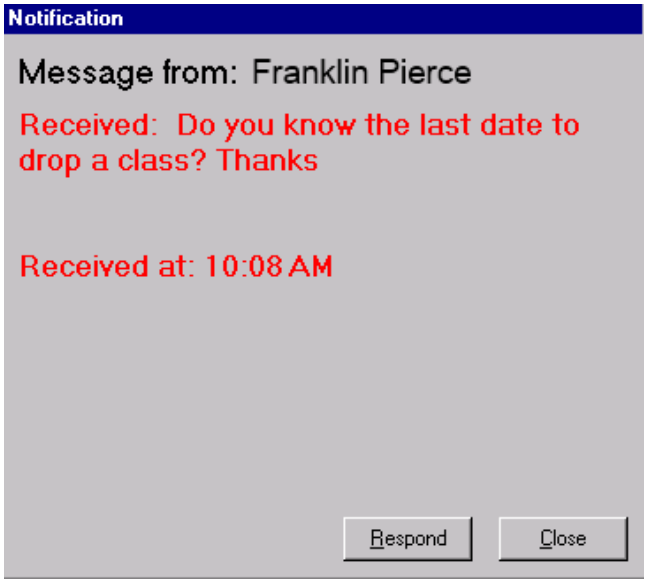
17.3 Respond to a Message

TO RESPOND TO A MESSAGE, follow the steps below:

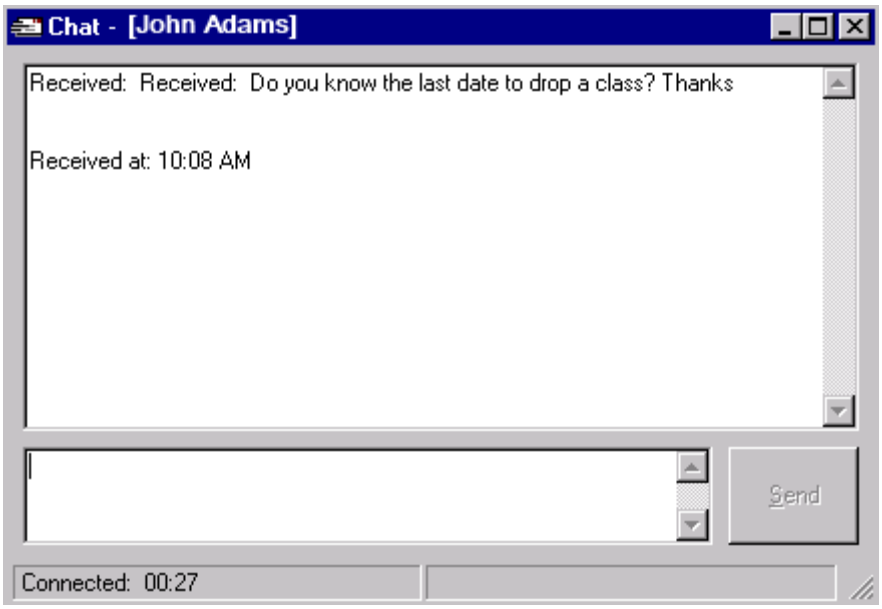
1. If you receive an Appointment Notification message, it might look like this:



2. If you receive a chat message from a colleague, the screen might look like this:



3. If the RESPOND button is available, the individual may reply to the sender with a brief message. To respond to the sender of the message, click on RESPOND. The following screen will be provided to type a brief message.



4. Click in the MESSAGE panel and type in the message to be sent

5. When done, click on SEND.

6. To close the Chat window, click on X at the upper right of the screen.

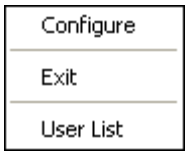
17.4 Broadcast a Message

The Instant Messaging system may be used to chat with a single user or to broadcast a message to a group of users.

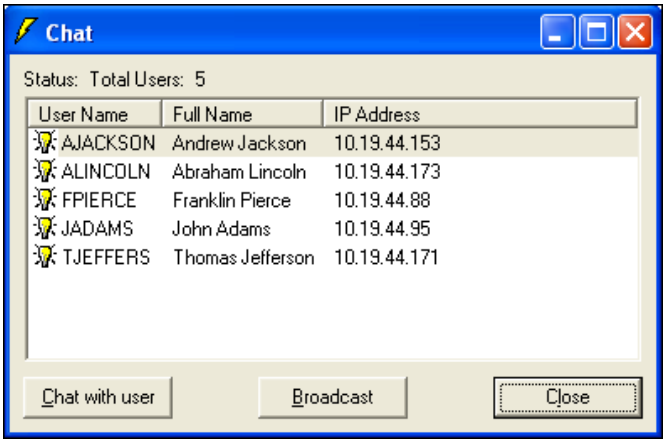
To broadcast a message, follow the steps below:

1. Log on as the user for whom messages are to be sent.

2. Right-click on the lightning bolt icon displayed on the task bar. The following menu will be displayed:

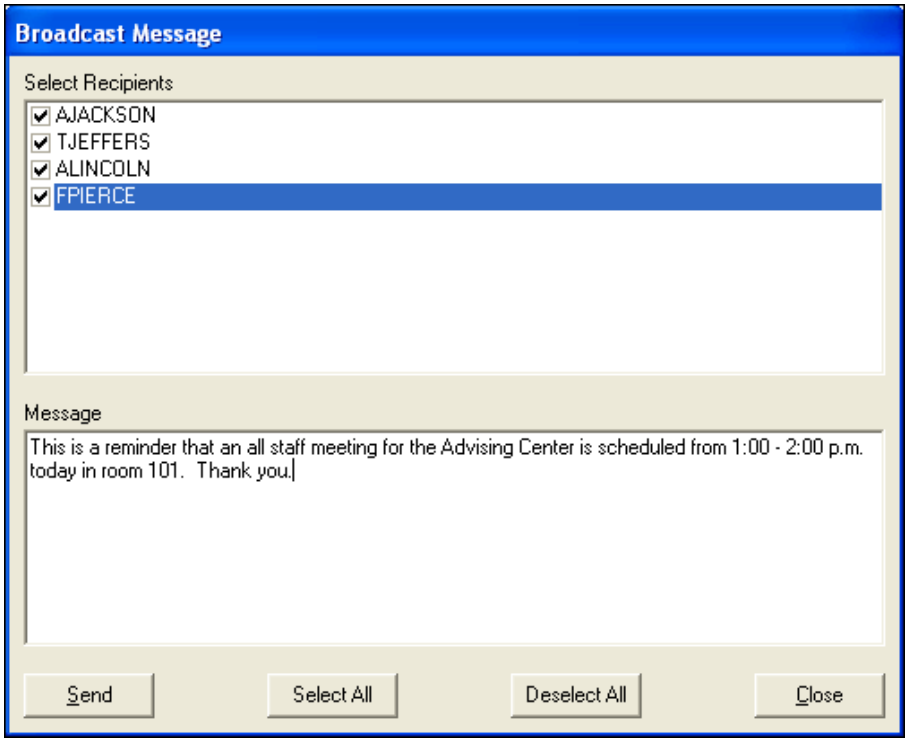


3. Click on USER LIST to display a Chat screen showing the users on the system. Here is an example:



4. Click on BROADCAST to open the Broadcast Message screen.

Here is an example:



5. In the SELECT RECIPIENTS panel, click on the checkbox adjacent to each recipient to whom the message will be sent, or click on SELECT ALL to check all boxes on the list.

6. Click in the MESSAGE panel and type in the message to be broadcast to the selected recipients.

7. When done, click on SEND. The message will be broadcast immediately.

8. Click on CLOSE to exit the Broadcast Message screen.

9. Click on X to exit the Chat screen.

SECTION 18 — THE PUBLIC VIEWER WAITING LIST

18.0 Overview

The Public View Waiting List is a separate program that resides in C:\Program Files\sarsgrid\waitinglist.exe.

It may be used when a Location wishes to set up a waiting list screen that may be viewed by students. This screen will display only the names of the students, not their IDs.

The Waiting List can be configured to cycle between any number of Locations and it can be used for both drop-in visits and scheduled appointments. The configurations will need to be made separately on each computer and each Location being used to display the Public Viewer Waiting List, even if the same computer is being used for different Locations.

1. Create a short cut on the desktop of the computer that will be used for the Waiting List by following the steps below:

   Note
   Prior to creating the short cut, SARS·GRID must be installed on the workstation and a user must have logged on to SARS·GRID at least one time, as doing so finalizes the installation.

   a. Right-click on an empty area of the desktop.

   b. Go to NEW and select SHORTCUT.

   c. Click on BROWSE and navigate to c:\program files\sarsgrid\waitinglist.exe

      Note
      If the file is not present, contact SARS Software Products, Inc. for assistance.

   d. Click OK.

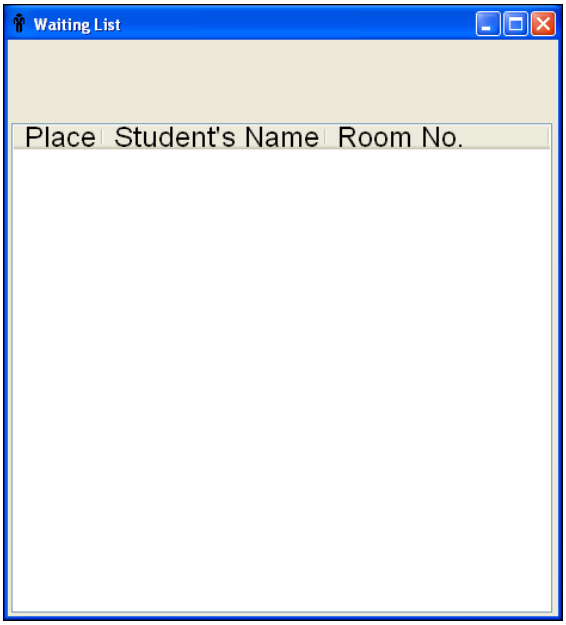
   e. Click NEXT.

   f. In the TYPE A NAME FOR THIS SHORTCUT field, type in WAITING LIST.

   g. Click FINISH.

2. Double-click on the WAITING LIST icon. It looks like this:

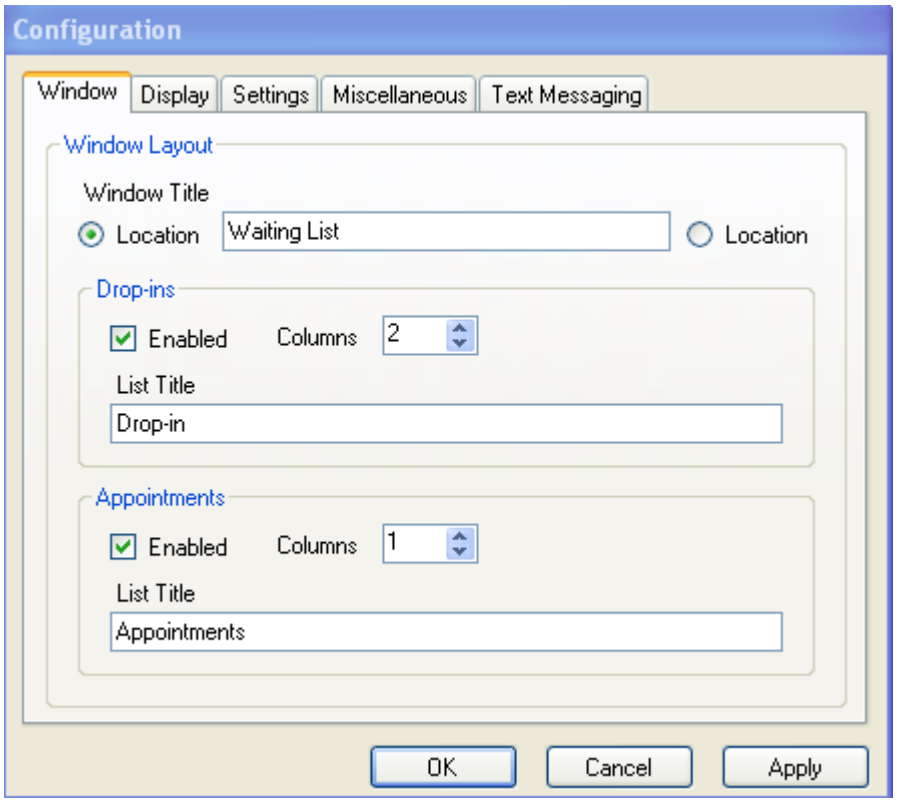
The Waiting List will be displayed. This is how it looks initially:



Press **F6** to display a CONFIGURATION screen. Each of the configuration screens are discussed in the sub-sections below.

18.1 Configure the Window Screen

1. From the Waiting List, press **F6** to display the Configuration screen. It will default to the Window tab. Here is an example:



The options from the WINDOW tab are:

- WINDOW LAYOUT:

LOCATION:	Use to specify that the name of the Location will be displayed before the title of the Waiting List (e.g., Advising – Waiting List).
WINDOW TITLE:	Use to type in the desired title to be shown at the top of the Waiting List (e.g., Waiting List).
LOCATION:	Use to specify that the name of the Location will be displayed after the title of the Waiting List (e.g., Waiting List – Advising).

- DROP-INS:

ENABLED:	Use to have the Waiting List display students who have registered for drop-in visits.
COLUMNS:	Use to select the number of columns to be displayed for the list of students waiting for a drop-in visit. The options are 1 – 5. (Using 2 or more columns allows more names

to be displayed without having to scroll down; however, two is the maximum recommended number of columns.)

LIST TITLE: Use to type in the title of the List (e.g., Drop-Ins).

- APPOINTMENTS:

  ENABLED: Use to have the list display students who have registered for scheduled appointments.

  COLUMNS: Use to select the number of columns to be displayed for the list of students waiting for a scheduled appointment. The options are 1 – 5. (Using 2 or more columns allows more names to be displayed without having to scroll down.)

  LIST TITLE: Use to type in the title of the List (e.g., Appointments).

- OK: Use to approve the settings and exit the screen.
- CANCEL: Use to undo the selections.
- APPLY: Use to approve the settings without exiting the screen.

2. In the Window Layout panel,

   a. Click on LOCATION preceding the text box for Window Title if you wish the name of the location to precede the title.

      -or-

      Click on LOCATION after the text box for Window Title if you wish the name of the location to come after the title.

   b. Click on the WINDOW TITLE text box and type in the Title of the window (e.g., Waiting List).

      Note: If the name of the Location is to precede the title, be sure to insert a *space – hyphen – space* before the text. If the name of the Location is to come after the title, be sure to insert a *space – hyphen – space* after the text.

      Example for Location preceding title:

      - Waiting List

      Example for Location after title:

      Waiting List -

3. In the Drop-ins panel,

   a. Click on ENABLED to have the list include drop-in registrants.

   b. Click on COLUMNS ▲ or ▼ to select the number of columns that should be displayed. Up to five columns may be selected.

c. Click on the LIST TITLE text box and then type in the name of the list (e.g.,Drop-ins).

4. In the Appointments panel,

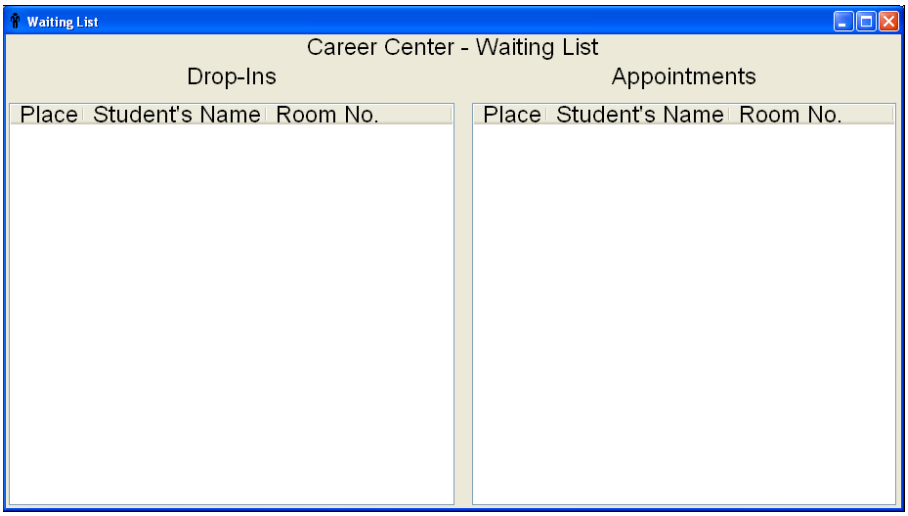
   a. Click on ENABLED to have the list include drop-in registrants.

   b. Click on COLUMNS ▲ or ▼ to select the number of columns that should be displayed. Up to five columns may be selected.

   c. Click on the LIST TITLE text box and then type in the name of the list (e.g., Appointments).

5. Click on OK.

   Here is an example of the screen with two columns selected:

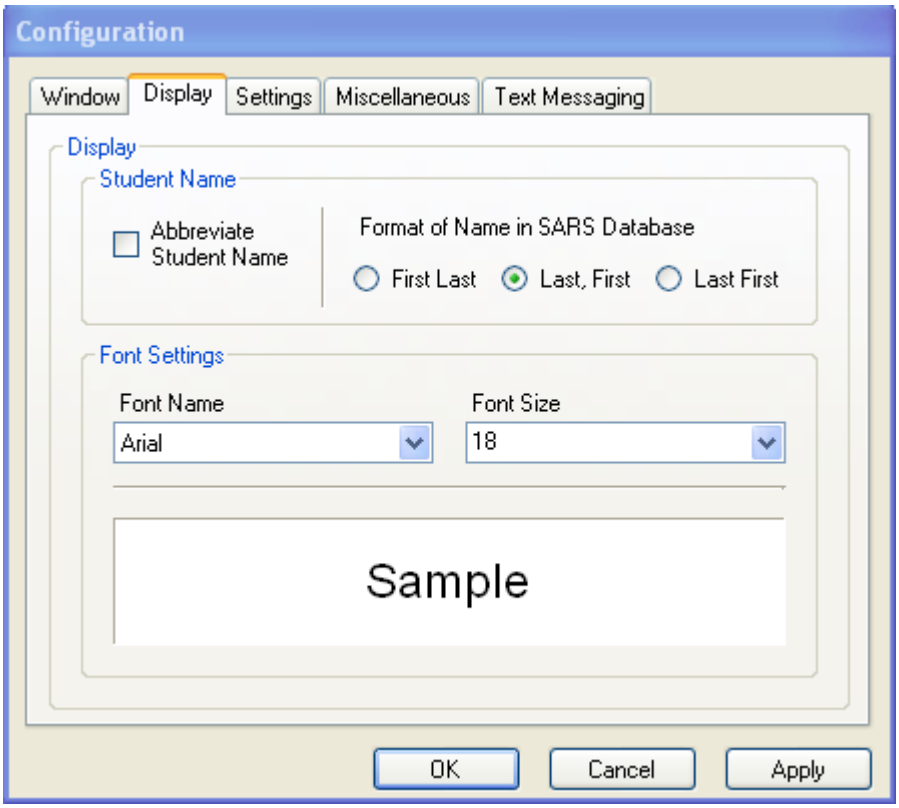


Note that the PLACE column is simply a numerical list. Student's Name will be displayed as specified in the Display screen. Room No. will be the room number that is associated with the advisor (created in Short Name Maintenance; see Section 4).

18.2 Configure the Display Screen

1. From the Waiting List, press **F6**, or if already in the Configuration setup, proceed with the steps listed below.

2. Click on DISPLAY tab. Here is an example of the screen:



The options from the Display tab are:

- STUDENT NAME:

ABBREVIATE STUDENT NAME:	Use to select the option to display only the student's first name and first initial of the student's last name on the screen.
FORMAT OF NAME IN SARS DATABASE:	Use to specify the format in which student names are stored in the database.
FIRST LAST:	Use to specify that the names will be listed by First Name then Last Name.
LAST, FIRST:	[Recommended] Use to specify that the names will be listed by Last Name then First Name, separated by a comma.
LAST FIRST:	Use to specify that the names will be listed by Last Name then First name with no comma separation.

- FONT SETTINGS:

FONT NAME:	Use to select the type of font to be used for the screen display.
FONT SIZE:	Use to select the size of the font to be used for the screen display.

- OK: Use to approve the settings and exit the screen.
- CANCEL: Use to undo the selections.
- APPLY: Use to approve the settings without exiting the screen.

3. [Optional] Click on ABBREVIATE STUDENT NAME if you wish to display only the student's first name and first initial of the student's last name on the screen. The FORMAT OF NAME IN SARS Database options will be activated.

   a. Click on FIRST LAST if the student names in the database are stored in First Name Last Name format.

      -or-

   b. Click on LAST, FIRST if the student names in the database are stored in Last Name, First Name format. If in doubt about the format of student names in the database, select this option.

      -or-

   c. Click on LAST FIRST if the student names in the database are stored in Last Name First Name format (with no comma separation).

4. Click on FONT NAME ▼ and then select the type of font to be used for the Default Viewer.

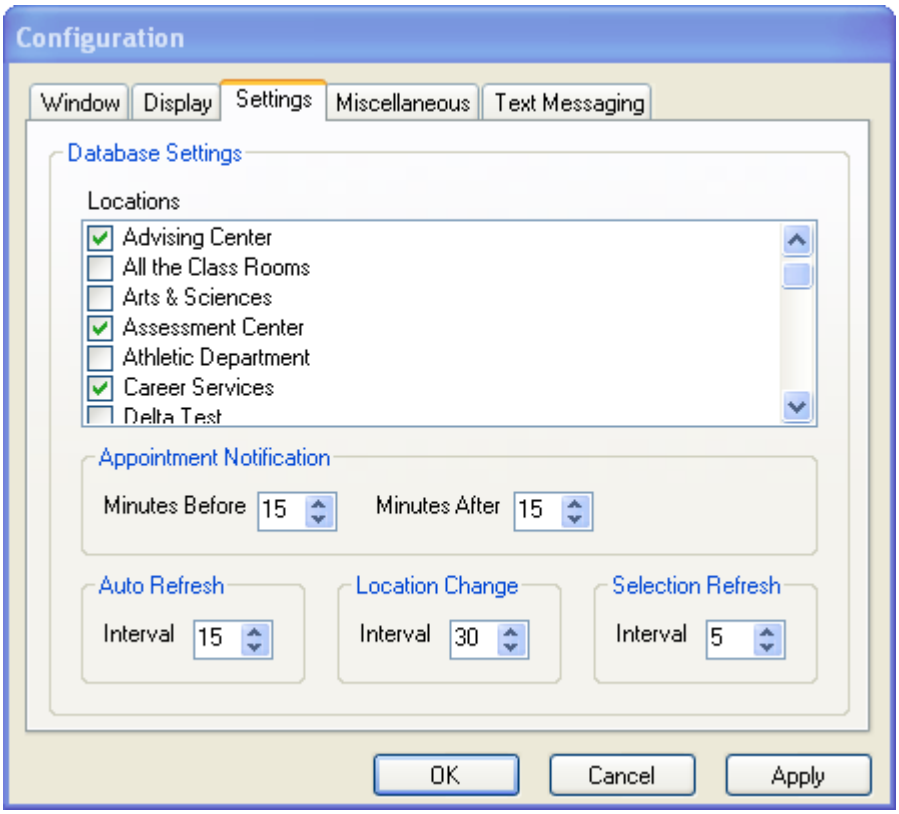
5. Click on FONT SIZE ▼ and then select the size of the font for the Default Viewer. A sample of the font in the selected size will be displayed in the space below.

6. Click on APPLY to save the settings or click on OK to save the settings and exit the screen.

18.3 Configure the Settings Screen

1. From the Waiting List, click on **F6**, or if already in the Configuration setup, proceed with the steps listed below.

2. Click on the SETTINGS tab. Here is an example of the screen:



The options from the Settings tab are:

- LOCATIONS: Use to select one or more locations that will be using the Waiting List. There is no limit to the number of locations.

- APPOINTMENT NOTIFICATION:

  MINUTES BEFORE: Use to specify the number of minutes before a student's appointment time that the student's name may first appear on the waiting list. The default is 15 minutes.

  MINUTES AFTER: Use to specify the number of minutes after a student's appointment time that the student's name will remain on the waiting list. The default is 15 minutes.

- AUTO REFRESH - INTERVAL: Use to specify the number of seconds that will elapse before the system searches for new information from the database and refreshes the waiting list screen. The default is 15 seconds, and this is the recommended interval.

- LOCATION CHANGE - INTERVAL: Use to specify the number of seconds that will elapse before the Waiting List cycles to the next Location, if more than one Location is using the same screen. The default is 30 seconds. This interval should not be more than 30 seconds, and in any event should not be less than the Auto Refresh Interval.
- SELECTION REFRESH - INTERVAL: Use to specify the flash rate of student names when advisors notify them to proceed to the designated room number. The default is 5 seconds, but 2 seconds is recommended.
- OK: Use to approve the settings and exit the screen.
- CANCEL: Use to undo the selections.
- APPLY: Use to approve the settings without exiting the screen.

3. Click on one or more Locations in the Locations panel to specify each and every Location that will be using the Waiting List.

4. In the Appointment Notification panel,

   a. Click on MINUTES BEFORE ▲ or ▼ and select the maximum number of minutes before the scheduled appointment time that the student's name will be displayed on the Waiting List. For example, if 15 minutes is selected and the student's appointment is at 9:30 AM and the student checks in at 9:00 AM, his name will not appear on the list until 9:15 AM.

   b. Click on MINUTES AFTER ▲ or ▼ and select the maximum number of minutes after the scheduled appointment time that the student's name will remain on the Waiting List. For example, if 15 minutes is selected and the student's appointment is at 9:30 AM, that student's name will be removed from the list at 9:45 AM, whether or not he has been seen.

5. Click on AUTO REFRESH INTERVAL ▲ or ▼ and select the desired frequency for refreshing the screen.

6. Click on LOCATION CHANGE INTERVAL ▲ or ▼ and select the number of seconds that should elapse before the Waiting List cycles to display the next Location, if more than one Location is using the list. For example, if 30 is selected and the list is being used by both Advising and the Career Center, the display will cycle between those two locations every 30 seconds.

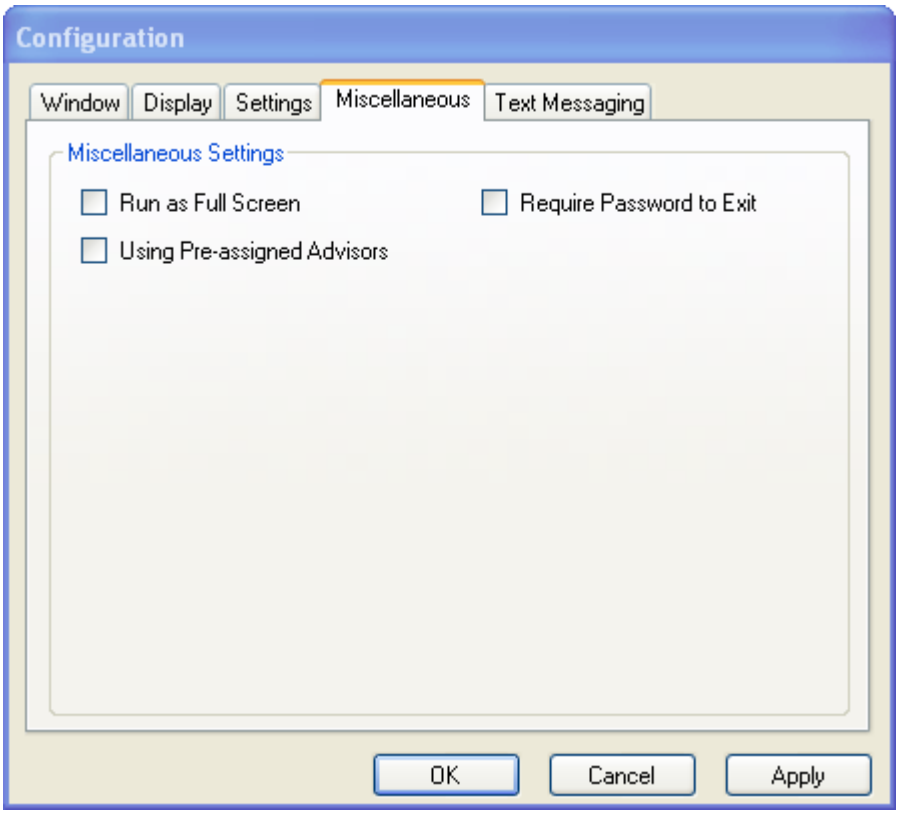
7. Click on SELECTION REFRESH INTERVAL ▲ or ▼ and select the flash rate for notifying students that they may proceed to the designated room number. The default is 5 seconds; however, it is recommended that this flash rate be set at 2.

8. Click on APPLY to save the settings or click on OK to save the settings and exit the screen.

18.4 Configure the Miscellaneous Screen

1. From the Waiting List, press **F6,** or if already in the Configuration setup, proceed with the steps listed below.

2. Click on the MISCELLANEOUS tab. Here is an example of the screen:



The options from the MISCELLANEOUS tab are:

- RUN AS FULL SCREEN: Use to display the Waiting List so that it covers the entire screen on the monitor.

- USING PRE-ASSIGNED ADVISORS: Use to prevent the flashing of a student name when the name is added to the Drop-in Screen and an advisor is selected. When this option is selected, student names will flash only when advisors notify students when they are ready to be seen.

- REQUIRE PASSWORD TO EXIT: Use to require a user with access rights to THE GRID to close the screen using their user names and passwords. This option will prevent non-SARS users from closing the waiting list screen and using the computer for other purposes.

3. Click on RUN AS FULL SCREEN if you wish to have the Public Viewer displayed as large as the entire screen.

4. Click on USING PRE-ASSIGNED ADVISORS if you wish to prevent the student's name from flashing when the advisor is assigned to the student. This option should be selected if advisor names are selected when the student is added to the Drop-in Screen.

5. Click on REQUIRE PASSWORD TO EXIT if you wish to prevent non-SARS users from closing the Public Viewer inadvertently. Only users who have permission to access THE GRID will be able to close the screen if this option is selected.

6. Click on APPLY to save the settings or click on OK to save the settings and exit the screen.

18.5 Configure Text Messaging

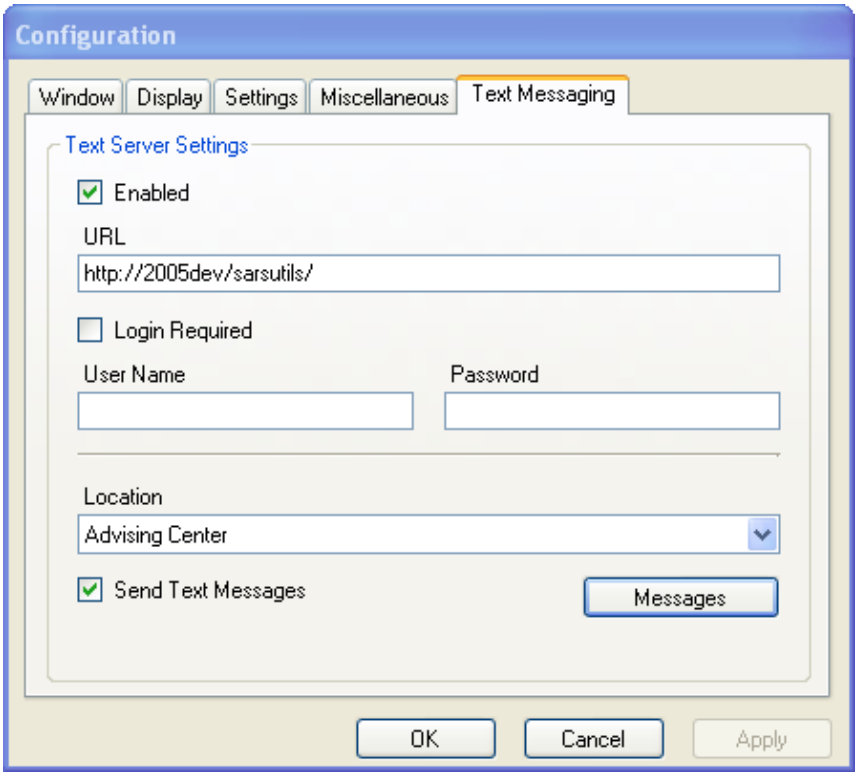
[This option is available only if your college has purchased a license for the Add-On Text Messaging Component.]

The text messaging component automatically notifies students when their position on a waiting list for walk-in visits reaches the designated threshold, alerts students that an advisor is ready to see them, and sends notifications of same-day appointments up to two hours in advance of a scheduled appointment.

The configurations will need to be made separately on each computer and each Location being used to display the Public Viewer Waiting List, even if the same computer is being used for different Locations.

1. From the Waiting List, press **F6,** or if already in the Configuration setup, proceed with the steps listed below.

2. Click on the TEXT MESSAGING tab. This tab will be displayed only if the Add-On Text Messaging Component is available. Here is an example of the screen:



The options from the TEXT MESSAGING tab are:

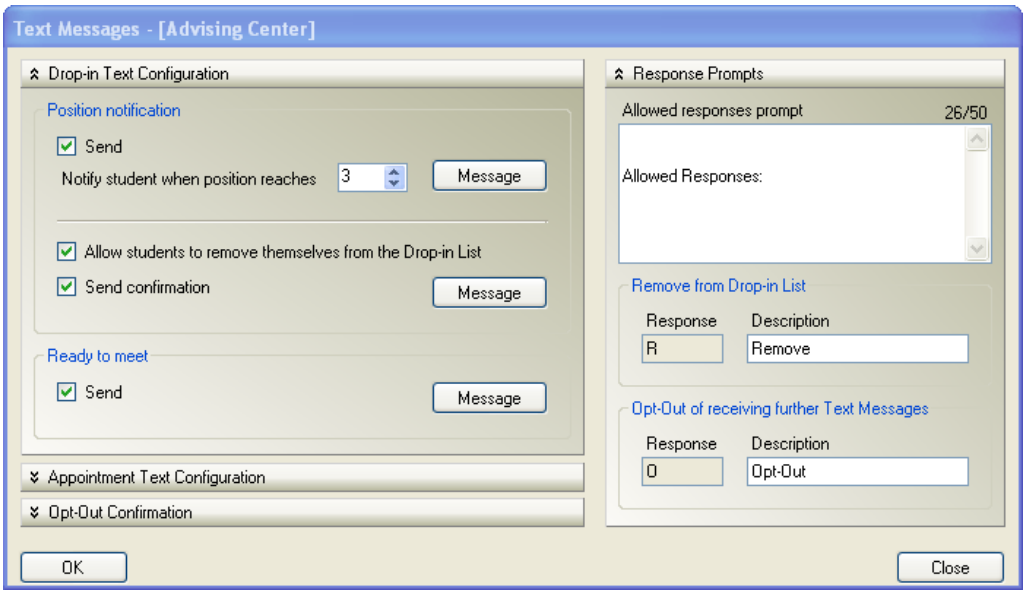
- ENABLED: Use to activate the Text Server Settings fields.
- URL: Use to enter the URL of the college's SARSUTIL service.
- LOGIN REQUIRED: [Optional] Use if the authorized user of the SARSUTIL service is required to log in.
  - USER NAME: Use to enter the username of the authorized user for the SARSUTIL service.
  - PASSWORD: Use to enter the password of the authorized user for the SARSUTIL service.
- LOCATION: Use to select a Location for which text messages are to be configured. All Locations that have been selected on the Settings tab will be available for use.
- SEND TEXT MESSAGES: Use to activate the Messages button on the screen, which will display another screen for configuring text messages for the selected Location.
  - MESSAGES: Use to gain access to a Text Messages screen for configuring text messages for the selected Location.
- OK: Use to approve the settings and exit the screen.
- CANCEL: Use to undo the selections.
- APPLY: Use to approve the settings without exiting the screen.

18.5.1 Configure the Text Server Settings

1. From the TEXT MESSAGING tab on the Configuration screen, click on the ENABLED checkbox to activate the fields on the screen.
2. Click on the URL field and type in the URL of the college's SARSUTIL service.
3. If users will be required to login to use the text messaging feature, click on the LOGIN REQUIRED checkbox. Then,
   a. Click on the USER NAME field and type in the specific user name of the authorized user for the text messaging feature.
   b. Click on PASSWORD field and type in the specific Password of the authorized user for the text messaging feature.
4. Click on LOCATION and select a Location for which text messages are to be configured.
5. Click on SEND TEXT MESSAGES to activate the MESSAGES button and proceed to the next step.

18.5.2 Configure Response Prompts

The Text Messages configuration screen consists of three collapsible screen options on the left-hand side and three types of Response Prompts on the right-hand side. Here is an example of the screen when it is first opened. Two of the three Response Prompts should be set up first.



The options from the RESPONSE PROMPTS panel are:

- ALLOWED RESPONSES PROMPT: Use to type in text that will prompt students if they may respond to the text message (e.g., "Allowed Responses"). This phrase, along with the response and description will be appended to every message to students (except for the Opt-out confirmation message).

- REMOVE FROM DROP-IN LIST: [Activated only after checking the ALLOW STUDENTS TO REMOVE THEMSELVES FROM THE DROP-IN LIST option.]

  RESPONSE: Used to display the letter that students will be prompted to use to remove themselves from the list.

  DESCRIPTION: Use to type in the description of the Remove prompt (e.g., "Remove").

- OPT-OUT OF RECEIVING FURTHER TEXT MESSAGES: Use to establish the settings for allowing students to opt out of receiving any text messages from locations using the database.

  RESPONSE: Used to display the letter that students will be prompted to use to opt out of receiving further text messages from any locations in the database.

  DESCRIPTION: Use to type in the description of the Opt-Out prompt (e.g., "Opt-Out").

- OK: Use to save the settings.
- CLOSE: Use to exit the Text Messages screen for the selected Location.

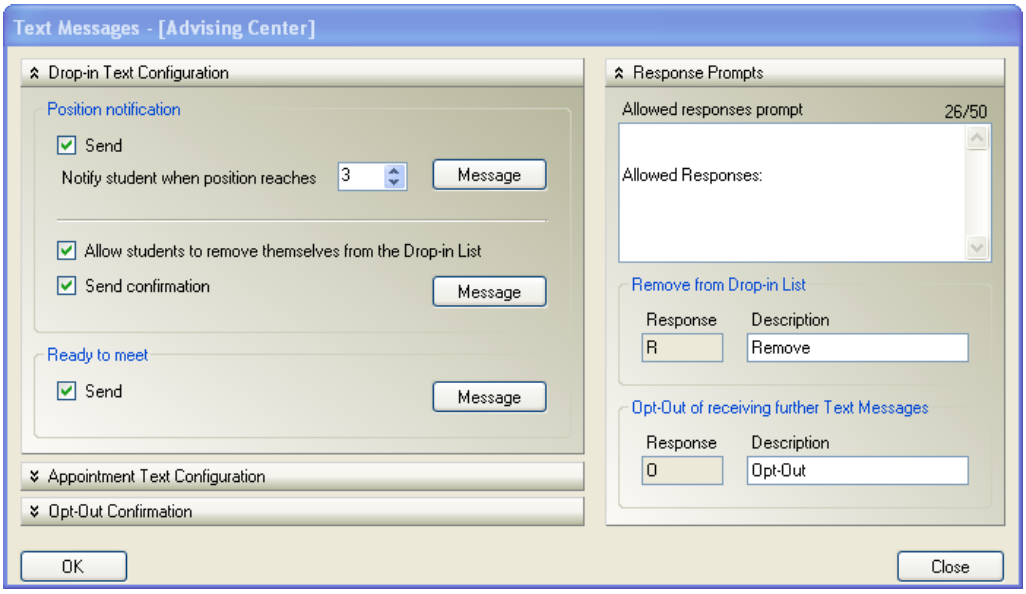
1. If you are not already in the Configuration screen, click on MESSAGES from the Text Messaging tab. Then navigate to the RESPONSE PROMPTS side of the screen.
2. In the ALLOWED RESPONSES PROMPT field, press the ENTER key twice and then type the wording that will be displayed to students as allowed responses. Here is an example:

   Allowed Responses:

   Be sure to end the text with a colon and two spaces.
3. Disregard the REMOVE FROM DROP-IN LIST panel for the moment. This is discussed in section 18.5.3, below.
4. In the OPT-OUT OF RECEIVING FURTHER TEXT MESSAGES panel, note the O in the RESPONSE field. This represents the key that students should select if they do not wish to receive any further text messages from the college. Click on the DESCRIPTION field and type in a description of the opt-out prompt. Here is an example: Opt Out.
5. Click on OK.

18.5.3 Configure the Drop-in Text Settings

1. If you are not already in the Configuration screen, click on MESSAGES from the TEXT MESSAGING tab. A Text Messages screen will be displayed with a Drop-in Text Configuration panel displayed as the default. Here again is the example:



The options from the DROP-IN TEXT CONFIGURATION panel are:

- POSITION NOTIFICATION: Use to configure settings for notifying students when their names reach a certain position on the Waiting List.

SEND:	Use to specify that a text message will be sent to students when their names reach the specified position on the list.
NOTIFY STUDENT WHEN POSITION REACHES:	Use to specify the position number that will trigger the Position Notification text message.
MESSAGE:	Use to configure the actual message that will be sent for this option.
• ALLOW STUDENTS TO REMOVE THEMSELVES FROM THE DROP-IN LIST:	Use to permit students to remove their names from the from the Drop-in List.
SEND CONFIRMATION:	Use to specify that a confirmation text message will be sent to students after they have removed themselves from the Drop-in List.
MESSAGE:	Use to configure the actual message that will be sent for this option.
• READY TO MEET:	Use to configure settings for notifying students when advisors are ready to meet with them.
SEND:	Use to specify that a text message will be sent to students when advisors are ready to meet with them.
MESSAGE:	Use to configure the actual message that will be sent for this option.
• OK:	Use to save the settings.
• CLOSE:	Use to exit the Text Messages screen for the selected Location.

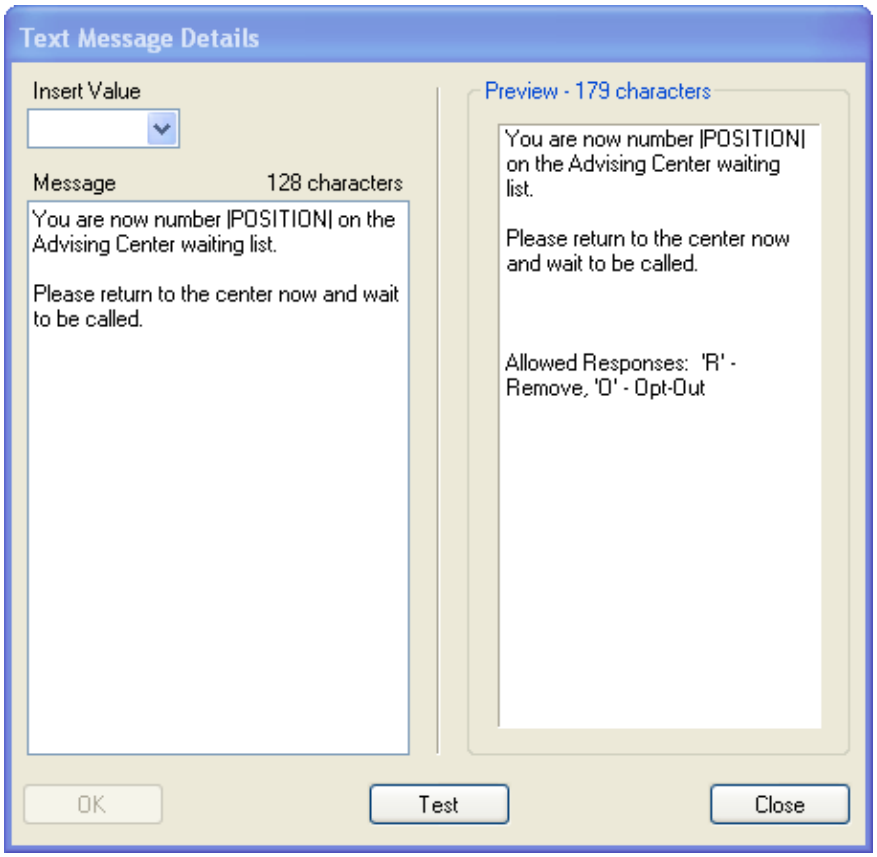
2. The POSITION NOTIFICATION option sends text messages to students when their names reach a specified position on the Waiting List. To establish the settings and create a message for this option, follow the steps below.

   a. Click on SEND. This will activate the other options in this panel.

   b. Click on the up or down arrow for the NOTIFY STUDENT WHEN POSITION REACHES: option to select the position number (e.g., 3) that, when reached, will trigger the message notification to the student.

   c. Click on MESSAGE to display a screen on which the specific message will be composed.

Here is an example of the Text Message Details screen for creating a message to students when they reach the selected position on the waiting list:



The options are:

- INSERT VALUE: Use to insert the |POSITION| value at the appropriate location within the message.
- MESSAGE: Use to type in the desired message, inserting relevant values as needed. Although the field will accept up to 2,000 characters, the maximum size for a single message is 160 characters. Anything longer will be split into two or more messages.
- PREVIEW: Use to view how the message will appear. If the message is too long, it will flow into additional text messages, and you may wish to shorten it.
- OK: Use to store the settings created for the specified text message.
- TEST: Use to make a test of the message by sending it to your own cell phone.
- CLOSE: Use to exit the screen.

d. Click in the MESSAGE text box and begin typing the desired message. At the point in the message to specify the position number that the student has reached on the Waiting List, click on INSERT VALUE ▼ and select |POSITION|. This is a place holder into which the system will automatically insert the position number specified on the previous screen.

e. View the appearance of the message in the PREVIEW panel on the right-hand side of the screen. If the message flows over to a second text message, edit to make it shorter.

f. Click on SAVE to store the settings.

g. To test whether the message is properly configured, click on TEST.

   i) Type in the cell phone number that is capable of receiving text messages that you will be able to view.

   ii) Click on OK.

   iii) Wait until the text message comes through on the cell phone. If the message is displayed, the system has been configured properly. Note that the value for |POSITION| will not represent the actual value that will be in the real text messages.

3. The ALLOW STUDENTS TO REMOVE THEMSELVES FROM THE DROP-IN LIST option provides students the opportunity to take their names off the drop-in waiting list. To establish the settings and create a message for this option, follow the steps below.

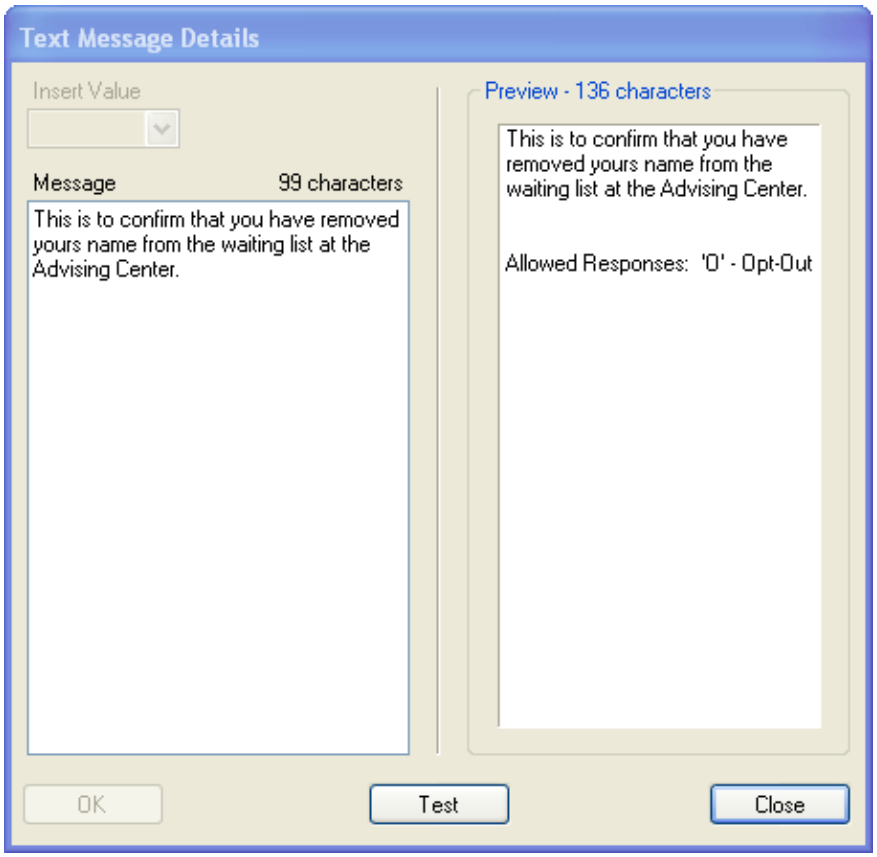
   a. Click on ALLOW STUDENTS TO REMOVE THEMSELVES FROM THE DROP-IN LIST. This will activate the SEND CONFIRMATION option, as well as the REMOVE FROM DROP-IN LIST option in the Response Prompts panel.

   b. Navigate to the RESPONSE PROMPTS side of the screen. In the REMOVE FROM DROP-IN LIST panel, note the R in the Response field. This represents the digit that students should select if they wish to remove their names from the drop-in list. Click on the DESCRIPTION field and type in a description of the remove prompt (e.g., “Remove”).

   c. If you want the system to send a confirmation message to students after they have removed themselves from the Drop-in List, click on SEND CONFIRMATION. This will activate the MESSAGE button.

   d. Click on MESSAGE to display a screen on which the specific message will be composed.

Here is an example of the confirmation message that will be sent to students after they have opted to remove their names from the Drop-in List:



The options are:

- MESSAGE: Use to type in the desired message, inserting relevant values as needed. Although the field will accept up to 2,000 characters, the maximum size for a single message is 160 characters. Anything longer will be split into two or more messages.
- PREVIEW: Use to view how the message will appear. If the message is too long, it will flow into additional text messages, and you may wish to shorten it.
- OK: Use to store the settings created for the specified text message.
- TEST: Use to make a test of the message by sending it to your own cell phone.
- CLOSE: Use to exit the screen.

e. Click on the MESSAGE text box and begin typing the desired message.

f. View the appearance of the message in the PREVIEW panel on the right-hand side of the screen. If the message flows over to a second text message, edit to make it shorter.

g. Click on OK to store the settings.

h. To test whether the message is properly configured, click on TEST.

i) Type in the cell phone number that is capable of receiving text messages that you will be able to view.

ii) Click on OK.

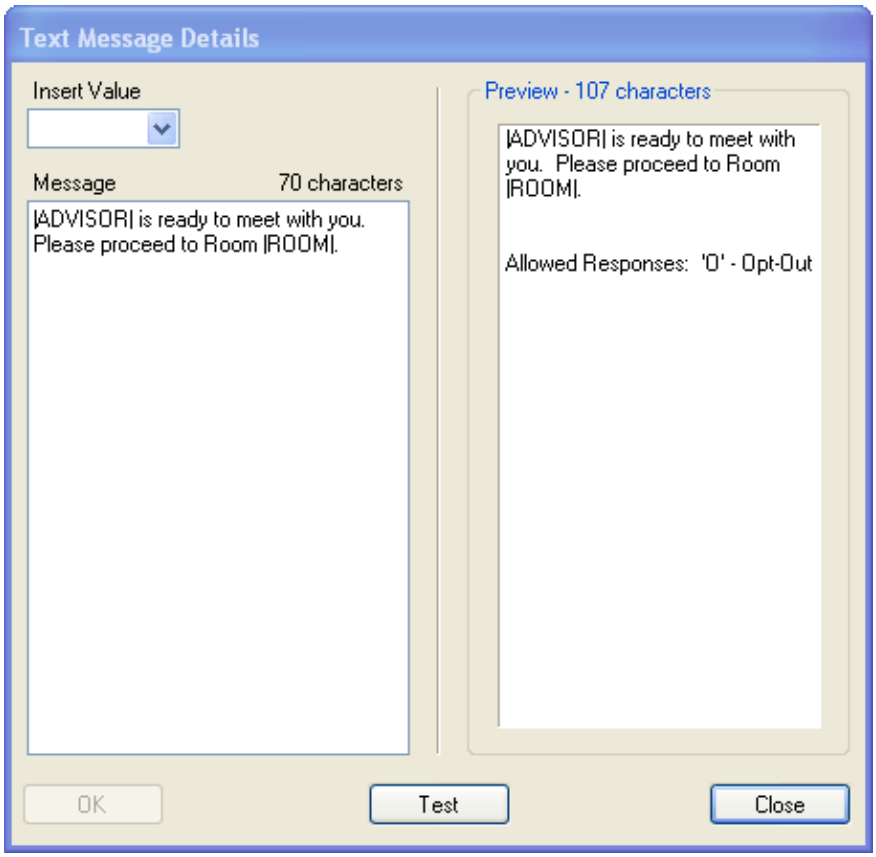
iii) Wait until the text message comes through on the cell phone. If the message is displayed, the system has been configured properly.

4. The READY TO MEET option sends text messages to students when advisors are ready to see them. To establish the settings and create a message for this option, follow the steps below.

a. Click on SEND in the READY TO MEET panel. This will activate the MESSAGE button.

b. Click on MESSAGE to display a screen on which the specific message will be composed.

Here is an example of the Text Message Details screen for creating a message to students that the advisor is ready to meet with them.



The options are:

- INSERT VALUE: Use to insert the |ADVISOR| and |ROOM| values at the appropriate location within the message.
- MESSAGE: Use to type in the desired message, inserting relevant values as needed. Although the field will accept up to 2,000 characters, the maximum size for a single message is 160 characters. Anything longer will be split into two or more messages.
- PREVIEW: Use to view how the message will appear. If the message is too long, it will flow into additional text messages, and you may wish to shorten it.
- OK: Use to store the settings created for the specified text message.
- TEST: Use to make a test of the message by sending it to your own cell phone.
- CLOSE: Use to exit the screen.

c. Click on the MESSAGE text box and begin typing the desired message. At the point in the message to specify the advisor name, click on INSERT VALUE ▼ and select |ADVISOR|. At the point in the message to specify the room number, click on INSERT VALUE ▼ and select |ROOM|. These are place holders into which the system will automatically insert the relevant information.

d. View the appearance of the message in the PREVIEW panel on the right-hand side of the screen. If the message flows over to a second text message, edit to make it shorter.

e. Click on OK to store the settings.

f. To test whether the message is properly configured, click on TEST.

   i) Type in the cell phone number that is capable of receiving text messages that you will be able to view.

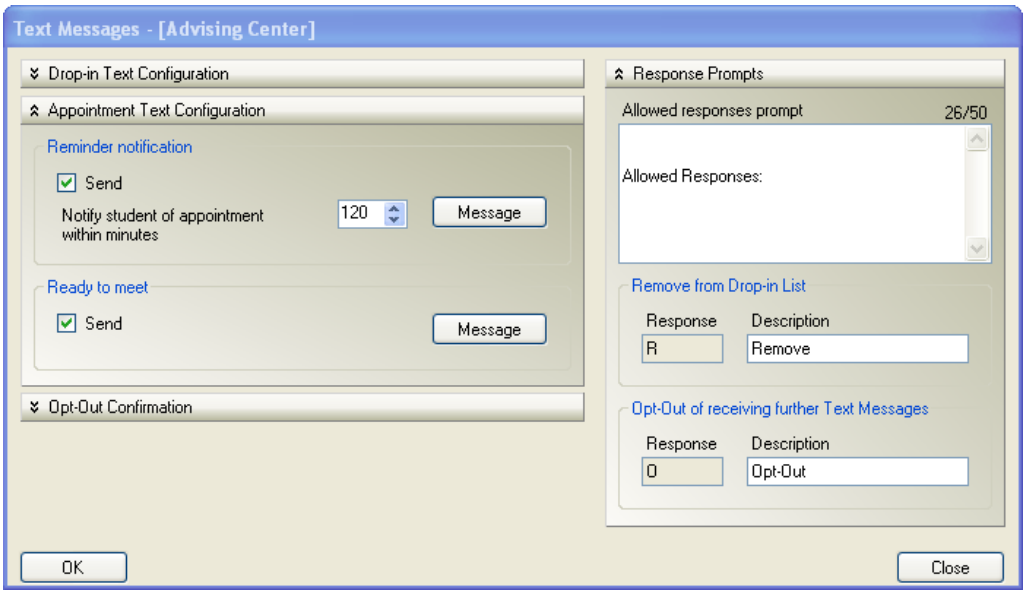
   ii) Click on OK.

   iii) Wait until the text message comes through on the cell phone. If the message is displayed, the system has been configured properly. Note that the values for Advisor and Room Number will not represent the actual words that will be in the real text messages. The Advisor example will be the longest advisor name that exists on the Short Name Maintenance screen. The Room number will be the longest Room number that exists in the database.

18.5.4 Configure the Appointment Text Settings

1. If you are not already in the Configuration screen, click on MESSAGES from the Text Messaging tab. A Text Messages screen will be displayed with a Drop-in Text Configuration panel displayed as the default.

2. Click on the APPOINTMENT TEXT CONFIGURATION expand/collapse symbol. Here is an example of the screen:



The options from the APPOINTMENT TEXT CONFIGURATION panel are:

- REMINDER NOTIFICATION: Use to configure settings for sending students reminders of their appointments.

  SEND: Use to specify that a text message will be sent to students to remind them of a same-day appointment.

  NOTIFY STUDENT OF APPOINTMENT WITHIN MINUTES: Use to specify the number of minutes prior to the appointment time that the text reminder will be sent.

  MESSAGE: Use to configure the actual message that will be sent for this option.

- READY TO MEET: Use to specify that text messages will be sent to students when advisors are ready to meet with them.

  SEND: Use to specify that a text message will be sent to students when their advisor is ready to see them.

  MESSAGE: Use to configure the actual message that will be sent for this option.

3. The REMINDER NOTIFICATION option sends text messages to students who have an appointment on the same day within the designated number of minutes preceding the

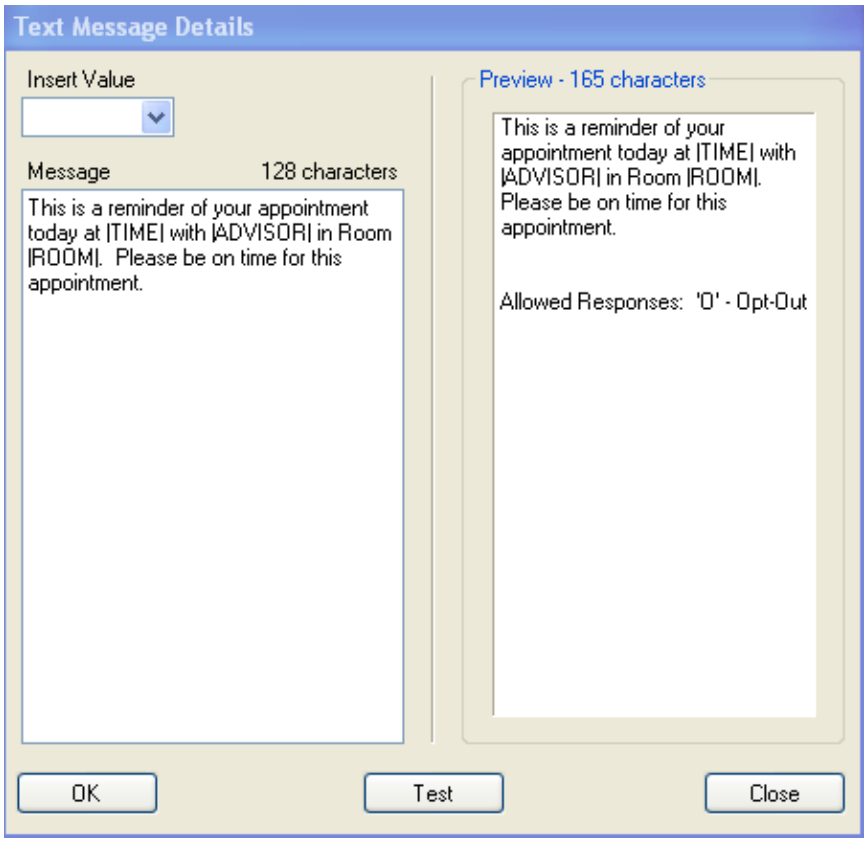
appointment start time. To establish the settings and create a message for this option, follow the steps below.

a. In the REMINDER NOTIFICATION panel, click on SEND. This will activate the other options in this panel.

b. Click on ▲ or ▼ for the NOTIFY STUDENT OF APPOINTMENT WITHIN MINUTES: option to select the number of minutes before the appointment time that the text message will be sent (e.g. 120 minutes).

c. Click on MESSAGE to display a screen on which the specific message will be composed.

Here is an example of the Text Message Details screen for creating a notification message for appointment reminders:



The options are:

- INSERT VALUE: Use to insert the |ADVISOR|, |ROOM|, and |TIME| values at the appropriate locations within the message.

- MESSAGE: Use to type in the desired message, inserting relevant values as needed. Although the field will accept up to 2,000 characters, the maximum size for a single message is 160 characters. Anything longer will be split into two or more messages.

- PREVIEW: Use to view how the message will appear. If the message is too long, it will flow into additional text messages, and you may wish to shorten it.
- OK: Use to store the settings created for the specified text message.
- TEST: Use to make a test of the message by sending it to your own cell phone.
- CLOSE: Use to exit the screen.

d. Click on the MESSAGE text box and begin typing the desired message. At the point in the message to specify the advisor name, click on INSERT VALUE ▼ and select the |ADVISOR|. At the point in the message to specify the room number, click on INSERT VALUE ▼ and select |ROOM|. At the point in the message to specify the time of the appointment, click on INSERT VALUE ▼ and select |TIME|. These are place holders into which the system will automatically insert the relevant information.

e. View the appearance of the message in the PREVIEW panel on the right-hand side of the screen. If the message flows over to a second text message, edit to make it shorter.

f. Click on OK to store the settings.

g. To test whether the message is properly configured, click on TEST.

   i) Type in the cell phone number that is capable of receiving text messages that you will be able to view.

   ii) Click on OK.

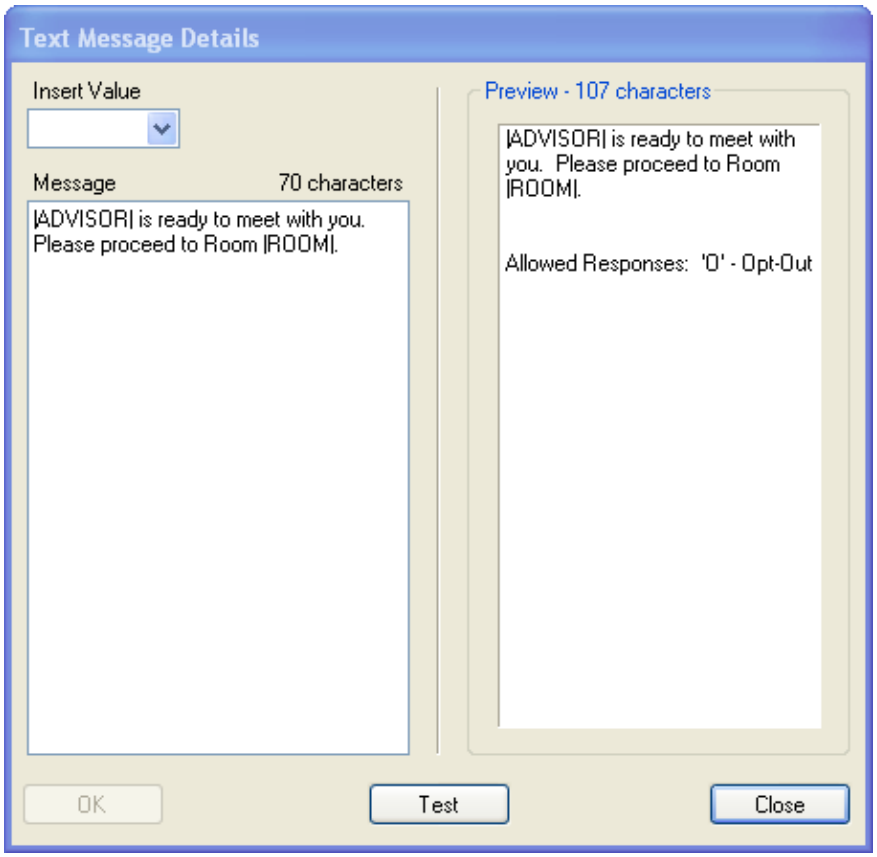
   iii) Wait until the text message comes through on the cell phone. If the message is displayed, the system has been configured properly. Note that the inserted values for Time, Advisor, and Room Number will not represent the actual words that will appear in the real text messages. The examples for Time will be the longest possible time in terms of character length. The example for Advisor will be the longest advisor name that exists on the Short Name Maintenance screen. The example for Room number will be the longest Room number that exists in the database.

4. The READY TO MEET option sends text messages to students when their advisor is ready to see them. To establish the settings and create a message for this option, follow the steps below.

   a. Click on SEND in the READY TO MEET panel. This will activate the MESSAGE button.

   b. Click on MESSAGE to display a screen on which the specific message will be composed.

Here is an example of the Text Message Details screen for composing a Ready to Meet message to students:



The options are:

- INSERT VALUE: Use to insert the |ADVISOR|, and |ROOM| values at the appropriate location within the message.
- MESSAGE: Use to type in the desired message, inserting relevant values as needed. Although the field will accept up to 2,000 characters, the maximum size for a single message is 160 characters. Anything longer will be split into two or more messages.
- PREVIEW: Use to view how the message will appear. If the message is too long, it will flow into additional text messages, and you may wish to shorten it.
- OK: Use to store the settings created for the specified text message.
- TEST: Use to make a test of the message by sending it to your own cell phone.
- CLOSE: Use to exit the screen.

c. Click on the MESSAGE text box and begin typing the desired message. At the point in the message to specify the advisor name, click on INSERT VALUE ▼ and select |ADVISOR|. At the point in the message to specify the room number, click on INSERT VALUE ▼ and select |ROOM|. These are place holders into which the system will automatically insert the relevant information.

d. View the appearance of the message in the PREVIEW panel on the right-hand side of the screen. If the message flows over to a second text message, edit to make it shorter.

e. Click on OK to store the settings.

f. To test whether the message is properly configured, click on TEST.

   i) Type in the cell phone number that is capable of receiving text messages that you will be able to view.

   ii) Click on OK.

   iii) Wait until the text message comes through on the cell phone. If the message is displayed, the system has been configured properly. Note that the values for Advisor and Room Number will not represent the actual words that will be in the real text messages. The Advisor example will be the longest advisor name that exists on the Short Name Maintenance screen. The Room number will be the longest Room number that exists in the database.

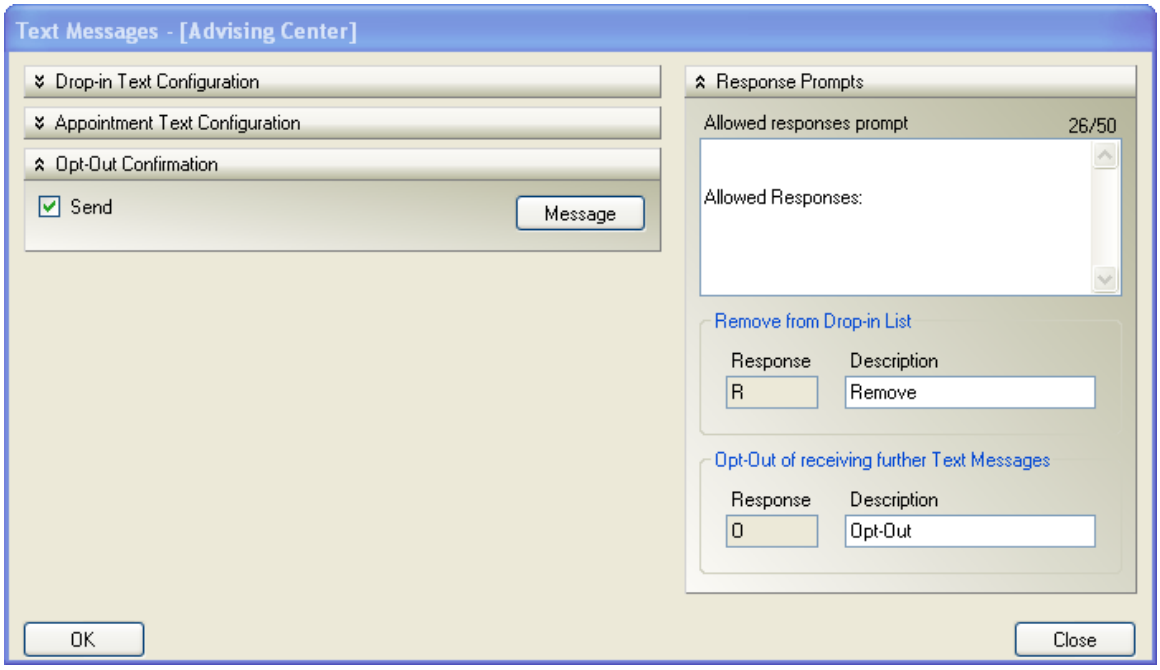
Note
Students will only receive the Ready to Meet message if advisors have selected Notify from the Waiting List status screen from MY GRID (click Alt+W).

18.5.5 Configure the Opt Out Confirmation Settings

1. If you are not already in the Configuration screen, click on MESSAGES from the Text Messaging tab. A Text Messages screen will be displayed with a Drop-in Text Configuration panel displayed as the default.

2. Click on the OPT-OUT CONFIGURATION expand/collapse symbol.

Here is an example of the OPT-OUT CONFIRMATION panel:

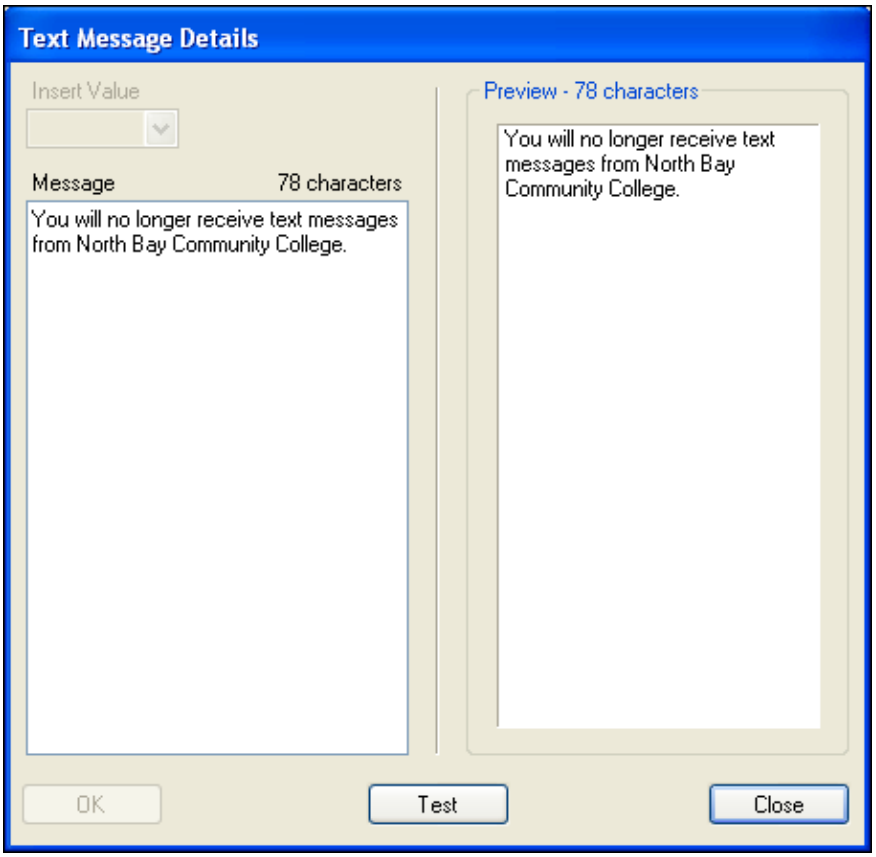


The options from the OPT-OUT CONFIGURATION panel are:

- SEND: Use to specify that a text message will be sent to students after they have opted out of receiving further text messages.
- MESSAGE: Use to configure the actual message that will be sent for this option.

3. Click on SEND. This will activate the MESSAGES button in this panel.
4. Click on MESSAGE to display a Text Message Details screen on which to compose the message to be sent to students who opt out of receiving text messages.

Here is an example of the Text Message Details screen for composing a confirmation message to students who opt out of receiving text messages:



The options are:

- MESSAGE: Use to type in the desired message, inserting relevant values as needed. Although the field will accept up to 2,000 characters, the maximum size for a single message is 160 characters. Anything longer will be split into two or more messages.
- PREVIEW: Use to view how the message will appear. If the message is too long, it will flow into additional text messages, and you may wish to shorten it.
- OK: Use to store the settings created for the specified text message.
- TEST: Use to make a test of the message by sending it to your own cell phone.
- CLOSE: Use to exit the screen.

5. Click on the MESSAGE text box and begin typing the desired message.
6. View the appearance of the message in the PREVIEW panel on the right-hand side of the screen. If the message flows over to a second text message, edit to make it shorter.

7. Click on OK to store the settings.

8. To test whether the message is properly configured, click on TEST.

    a. Type in the cell phone number that is capable of receiving text messages that you will be able to view.

    b. Click on OK.

    c. Wait until the text message comes through on the cell phone. If the message is displayed, the system has been configured properly.

9. When done, click on CLOSE.

10. Repeat steps 1 – 9 for each additional Location that will be using Text Messaging.

The Waiting List is now ready for use.

Notes

The screen may be resized as desired using the standard Windows method for resizing.

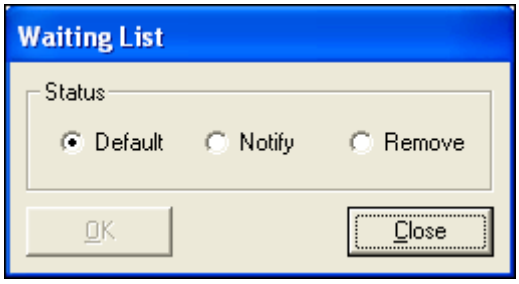
The default settings that were selected will be retained until changed.

18.6 Use the Waiting List

This function is performed only from THE GRID or MY GRID and only for booked appointments.

1. When it is time to notify the next student with a booked appointment that the advisor is ready to see him or her, click on the booked appointment for that student.

2. Press **Alt+W** to display the following Waiting List screen.



The options are:

- DEFAULT: Used to leave the student's name on the waiting list.
- NOTIFY: Use to initiate the flashing of the student's name on the waiting list.
- REMOVE: Use to remove the student's name from the waiting list when the appointment is over.
- OK: Use to approve the selection of a change of status.
- CLOSE: Use to exit the screen.

a. Click on NOTIFY.

b. Click on OK to flash the student's name on the waiting list. This will be a signal to the student in the waiting room that he or she may proceed to the advisor's room. If text messaging has been enabled for drop-ins, clicking on OK will also send a text message to the student, if that student has a text phone entered in the system and text is activated as a contact method. The text option enables students to be away from the Public View and still receive notification when it is time for them to be seen.

3. When the student arrives, click on the student's booked appointment slot again.

a. Press **Alt-W** to display the Waiting List screen again.

b. Click on REMOVE.

c. Click on OK. The student's name will be removed from the waiting list.

PART III – THE MAJOR SCREENS

Introduction

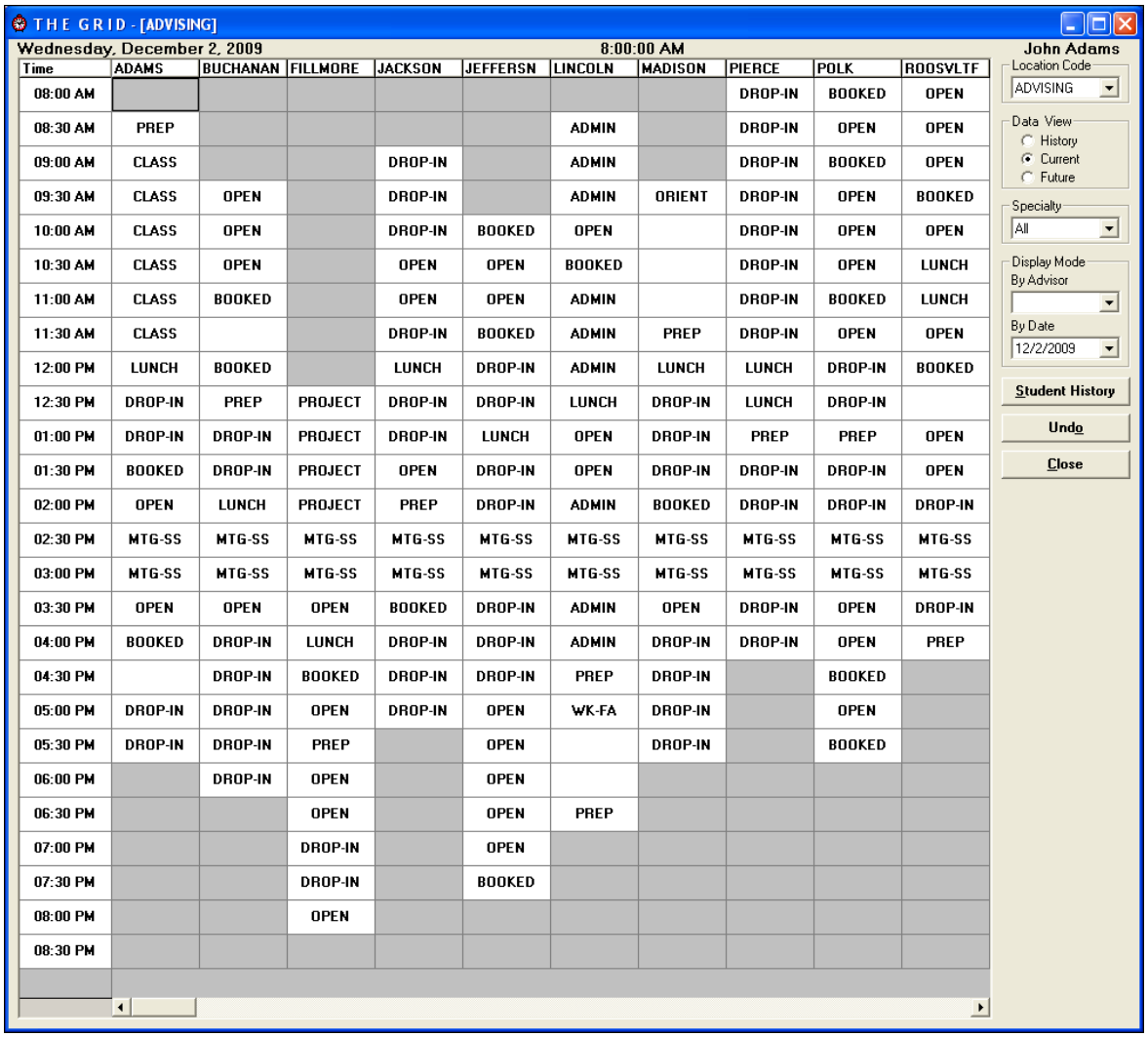
This Part covers the major screens used when performing routine functions in SARS·GRID. They include the following:

SECTION 9 — THE GRID

9.0 Overview

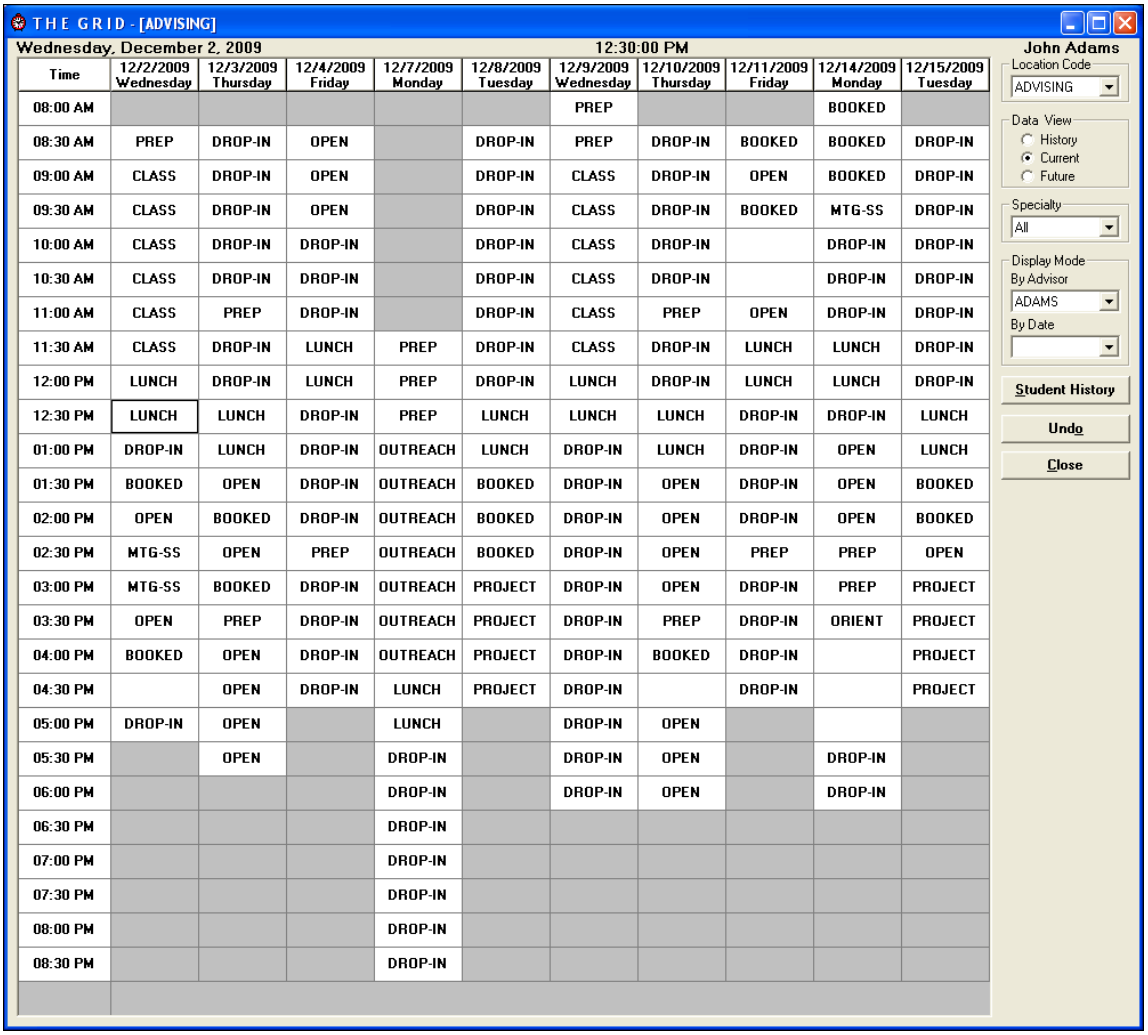
THE GRID is a matrix of cells that displays scheduling data. Each cell represents a date and time of day for an individual advisor. THE GRID is used to performing scheduling functions.

Here is an example of THE GRID in DISPLAY MODE BY DATE.



Time	ADAMS	BUCHANAN	FILLMORE	JACKSON	JEFFERSN	LINCOLN	MADISON	PIERCE	POLK	ROOSVLTF
08:00 AM								DROP-IN	BOOKED	OPEN
08:30 AM	PREP					ADMIN		DROP-IN	OPEN	OPEN
09:00 AM	CLASS			DROP-IN		ADMIN		DROP-IN	BOOKED	OPEN
09:30 AM	CLASS	OPEN		DROP-IN		ADMIN	ORIENT	DROP-IN	OPEN	BOOKED
10:00 AM	CLASS	OPEN		DROP-IN	BOOKED	OPEN		DROP-IN	OPEN	OPEN
10:30 AM	CLASS	OPEN		OPEN	OPEN	BOOKED		DROP-IN	OPEN	LUNCH
11:00 AM	CLASS	BOOKED		OPEN	OPEN	ADMIN		DROP-IN	BOOKED	LUNCH
11:30 AM	CLASS			DROP-IN	BOOKED	ADMIN	PREP	DROP-IN	OPEN	OPEN
12:00 PM	LUNCH	BOOKED		LUNCH	DROP-IN	ADMIN	LUNCH	LUNCH	DROP-IN	BOOKED
12:30 PM	DROP-IN	PREP	PROJECT	DROP-IN	DROP-IN	LUNCH	DROP-IN	LUNCH	DROP-IN	
01:00 PM	DROP-IN	DROP-IN	PROJECT	DROP-IN	LUNCH	OPEN	DROP-IN	PREP	PREP	OPEN
01:30 PM	BOOKED	DROP-IN	PROJECT	OPEN	DROP-IN	OPEN	DROP-IN	DROP-IN	DROP-IN	OPEN
02:00 PM	OPEN	LUNCH	PROJECT	PREP	DROP-IN	ADMIN	BOOKED	DROP-IN	DROP-IN	DROP-IN
02:30 PM	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS
03:00 PM	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS	MTG-SS
03:30 PM	OPEN	OPEN	OPEN	BOOKED	DROP-IN	ADMIN	OPEN	DROP-IN	OPEN	DROP-IN
04:00 PM	BOOKED	DROP-IN	LUNCH	DROP-IN	DROP-IN	ADMIN	DROP-IN	DROP-IN	OPEN	PREP
04:30 PM		DROP-IN	BOOKED	DROP-IN	DROP-IN	PREP	DROP-IN		BOOKED	
05:00 PM	DROP-IN	DROP-IN	OPEN	DROP-IN	OPEN	WK-FA	DROP-IN		OPEN	
05:30 PM	DROP-IN	DROP-IN	PREP		OPEN		DROP-IN		BOOKED	
06:00 PM		DROP-IN	OPEN		OPEN					
06:30 PM			OPEN		OPEN	PREP				
07:00 PM			DROP-IN		OPEN					
07:30 PM			DROP-IN		BOOKED					
08:00 PM			OPEN							
08:30 PM										

Here is an example of THE GRID in DISPLAY MODE BY ADVISOR.



Time	12/2/2009 Wednesday	12/3/2009 Thursday	12/4/2009 Friday	12/7/2009 Monday	12/8/2009 Tuesday	12/9/2009 Wednesday	12/10/2009 Thursday	12/11/2009 Friday	12/14/2009 Monday	12/15/2009 Tuesday
08:00 AM						PREP			BOOKED	
08:30 AM	PREP	DROP-IN	OPEN		DROP-IN	PREP	DROP-IN	BOOKED	BOOKED	DROP-IN
09:00 AM	CLASS	DROP-IN	OPEN		DROP-IN	CLASS	DROP-IN	OPEN	BOOKED	DROP-IN
09:30 AM	CLASS	DROP-IN	OPEN		DROP-IN	CLASS	DROP-IN	BOOKED	MTG-SS	DROP-IN
10:00 AM	CLASS	DROP-IN	DROP-IN		DROP-IN	CLASS	DROP-IN		DROP-IN	DROP-IN
10:30 AM	CLASS	DROP-IN	DROP-IN		DROP-IN	CLASS	DROP-IN		DROP-IN	DROP-IN
11:00 AM	CLASS	PREP	DROP-IN		DROP-IN	CLASS	PREP	OPEN	DROP-IN	DROP-IN
11:30 AM	CLASS	DROP-IN	LUNCH	PREP	DROP-IN	CLASS	DROP-IN	LUNCH	LUNCH	DROP-IN
12:00 PM	LUNCH	DROP-IN	LUNCH	PREP	DROP-IN	LUNCH	DROP-IN	LUNCH	LUNCH	DROP-IN
12:30 PM	LUNCH	LUNCH	DROP-IN	PREP	LUNCH	LUNCH	LUNCH	DROP-IN	DROP-IN	LUNCH
01:00 PM	DROP-IN	LUNCH	DROP-IN	OUTREACH	LUNCH	DROP-IN	LUNCH	DROP-IN	OPEN	LUNCH
01:30 PM	BOOKED	OPEN	DROP-IN	OUTREACH	BOOKED	DROP-IN	OPEN	DROP-IN	OPEN	BOOKED
02:00 PM	OPEN	BOOKED	DROP-IN	OUTREACH	BOOKED	DROP-IN	OPEN	DROP-IN	OPEN	BOOKED
02:30 PM	MTG-SS	OPEN	PREP	OUTREACH	BOOKED	DROP-IN	OPEN	PREP	PREP	OPEN
03:00 PM	MTG-SS	BOOKED	DROP-IN	OUTREACH	PROJECT	DROP-IN	OPEN	DROP-IN	PREP	PROJECT
03:30 PM	OPEN	PREP	DROP-IN	OUTREACH	PROJECT	DROP-IN	PREP	DROP-IN	ORIENT	PROJECT
04:00 PM	BOOKED	OPEN	DROP-IN	OUTREACH	PROJECT	DROP-IN	BOOKED	DROP-IN		PROJECT
04:30 PM		OPEN	DROP-IN	LUNCH	PROJECT	DROP-IN		DROP-IN		PROJECT
05:00 PM	DROP-IN	OPEN		LUNCH		DROP-IN	OPEN			
05:30 PM		OPEN		DROP-IN		DROP-IN	OPEN		DROP-IN	
06:00 PM				DROP-IN		DROP-IN	OPEN		DROP-IN	
06:30 PM				DROP-IN						
07:00 PM				DROP-IN						
07:30 PM				DROP-IN						
08:00 PM				DROP-IN						
08:30 PM				DROP-IN						

THE GRID allows you to work with the following selections:

- LOCATION CODE: Use to select the work unit for which schedules will be displayed on THE GRID.

- DATA VIEW: Use to select that part of THE GRID (History, Current, or Future) from which the dates to be displayed are located.

  HISTORY: Use to access a date that occurs before the first date in the Current Data View.

  CURRENT: Use to access a date that occurs within the period that is typically available for scheduling functions (for example, one or two weeks).

  FUTURE: Use to access a date that occurs after the last date in the Current Data View.

- SPECIALTY: Use to identify advisors by specialized subject matter or skill in order to schedule students with an individual who can best meet their needs. For example, some advisors may have specialized knowledge pertinent to veterans; others may have knowledge that is pertinent to athletes. In addition, advisors may be grouped according to their language skills to facilitate working with students who have limited English proficiency.

- DISPLAY MODE: Use to determine the display format on THE GRID (by Advisor or by Date).

  BY ADVISOR: Use to display multiple dates for a single advisor. This field label is dynamic and may vary depending on the SHORT NAME LABEL selected for the Location (see Location Properties -- Miscellaneous Settings in Part I, Section 4).

  BY DATE: Use to display multiple advisors for a single date. DISPLAY MODE BY DATE may be further refined by grouping advisors by specialties.

- STUDENT HISTORY: Use to view the appointment and drop-in history for a student.

- UNDO: Use to reverse the last cancellation made on the same PC used to make the cancellation, but only during the immediate work session.

- CLOSE: Use to exit the screen.

THE GRID provides access to a number of other scheduling-related screens.

Note
The number of viewable columns is dependent upon the location-determined column width, as well as the screen resolution of your PC. For example, a high resolution, 1280 x 1024, will display a maximum of 16 columns that are 8 characters wide. A medium resolution of 1024 x 768 will display up to 13 columns. A low resolution of 800 x 600 will display up to 9 columns.

9.1 Navigate THE GRID

To configure THE GRID for persons with disabilities, see Appendix C.

1. Click on the SARS·MENU icon.

2. From the SARS·MENU, click on THE GRID. THE GRID displays all schedules for today, defaulting to the Current Data View, Display Mode by Date, and all Specialties.

   The SARS·MENU will show only those programs to which the user has access.

   Note
   Generally, the advisor columns on THE GRID will be displayed in alphabetical order. However, an option exists to alter the display order, so names may appear in a customized manner.

3. To display another date for multiple advisors:

   a. Click on BY DATE ▼. A list of dates will appear.

   b. Click on the selected date. If the desired date is not listed, change the DATA VIEW; then select the date.

   Tip
   To back up THE GRID by one day without using the DISPLAY MODE BY DATE feature, press **F2**. To move THE GRID forward by one day, press **F3**.

4. To change the DATA VIEW, click on HISTORY, CURRENT, or FUTURE.

   Notes
   Most activities occur in Current Data View. To go to Future Data View, you must have access rights. See your System Administrator regarding your access rights.

   The most recent date in history, rather than the oldest date, is displayed first.

5. To view one individual's schedule for multiple dates:

   a. Click on BY ADVISOR ▼. A list of advisors will appear.

   b. Click on the selected name.

   Notes
   To select a specific date in History or Future Data View modes while in DISPLAY MODE BY ADVISOR, click on the "jump button" at the bottom of THE GRID and select the desired date.

   To move to the next or previous group of dates while in DISPLAY MODE BY ADVISOR and in History or Future Data View modes, click on >> (next) or << (previous) at the bottom of THE GRID. THE GRID will display the next (or previous) set of dates based on the data view size settings for those Views.

6. To display a specific group of advisors rather than all advisors:

   a. When in Display Mode by Date, click on SPECIALTY▼. A list of specialties will appear.

   b. Click on the selected specialty.

7. To re-size the columns on THE GRID, rest the cursor in the header on the vertical line between the columns. Left-click and keep the mouse button depressed while moving the mouse to the left or right. The re-sized columns will be memorized, and the settings will be displayed during future SARS·GRID sessions.

8. To increase the height of the rows, rest the cursor on the top or bottom perimeter of THE GRID. Left-click and keep the button depressed while moving the mouse up (from the top perimeter) or down (from the bottom perimeter). The re-sized GRID will be memorized, and the settings will be displayed during future sessions.

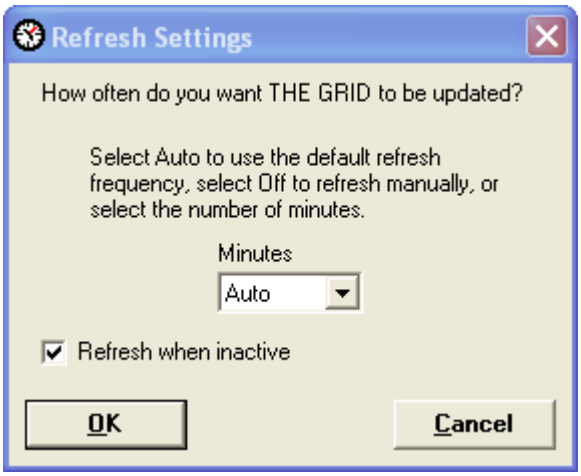
9.2 Refresh THE GRID

Refreshing THE GRID refers to the action of displaying the latest scheduling changes.

THE GRID will be updated to reflect the most current information every time an action is taken on THE GRID from your own workstation. If an action is not taken on THE GRID, THE GRID will still refresh every 30 seconds if the Auto Refresh option is selected, unless the screen is inactive or minimized. To ensure that THE GRID is refreshed, even when the screen is inactive or minimized, the REFRESH WHEN INACTIVE option is pre-selected as a default setting.

The options for modifying the manner in which THE GRID is updated on individual workstations are described below.

Here is an example of the REFRESH SETTINGS screen:



The options are:

- MINUTES: Use to select the desired refresh option. Three choices are available.

  AUTO: Use to retain the default Auto Refresh frequency (every 30 seconds).

  OFF: Use to turn off the Auto Refresh feature.

  1-30: Use to display a drop-down list from which any number of minutes from 1 – 30 may be selected as the Auto Refresh frequency.

- REFRESH WHEN INACTIVE: Use in combination with AUTO REFRESH to update THE GRID, even when it is minimized or not the active application on the computer screen. This option is pre-selected as a default setting.

1. From THE GRID, press **Alt R** to display the REFRESH SETTINGS screen.

2. Click on MINUTES ▼ and select one of the following options:

   a. Select AUTO to retain the default Auto Refresh frequency (every 30 seconds).

   b. Select OFF to turn off the Auto Refresh function entirely for this PC.

   Note
   The scheduler must remember to press **F5** to update the display if an action has not been recently taken on THE GRID.

   c. Select the number of minutes to elapse between screen refreshes, if different from the 30-second default.

3. Note that the REFRESH WHEN INACTIVE checkbox is pre-selected. This option will refresh THE GRID when it is minimized or not the active application. This setting has no effect if AUTO REFRESH is OFF.

   Warning
   In rare instances when system resources are low, enabling the REFRESH WHEN INACTIVE option may cause your PC to run slowly. If this is the case, uncheck the REFRESH WHEN INACTIVE option.

4. Click on OK.

PART IV – USE THE APPLICATION (SCHEDULERS)

Part IV is intended for use by schedulers. This Part is comprised of the following sections:

SECTION 19 — SCHEDULING FUNCTIONS

19.0 Overview

The Student Appointment Screen and the Roster are discussed in Sections 12 and 13 in Part III.

This Section guides schedulers in performing a variety of routine scheduling tasks using THE GRID. The list that follows is a table of contents for Section 19.

Note about Terminology
Throughout these chapters, the word ADVISOR is used generically to describe any person who may have appointments and/or drop-in visits with students and has a Master Schedule in SARS·GRID. The System Administrator may establish a Short Name Label for each Location to more correctly identify the type of individual (e.g., Counselor, Tutor, Nurse, etc.).

Note for Persons with Disabilities
SARS·GRID contains accessibility features for the visually and manually impaired. For information on configuring these features, see Appendix C. If the text-to-speech component is used in Professional mode, we recommend that users temporarily turn off third-party text-to-speech components. To ensure privacy of information, we also recommend that earphones be used when the text-to-speech function is activated on a computer that is located in a public area.

19.1 Schedule an Appointment

An individual appointment is any scheduled activity that is attended by a single student. A group appointment is any scheduled activity that may be attended by more than one individual. Examples of group appointments are orientation sessions and testing sessions.

To schedule an appointment the following minimum information is needed: the student's identifier and first and last name. If a student cannot remember the name of the advisor with whom previous appointments were scheduled, use STUDENT HISTORY to obtain that information.

1. On the SARS·MENU, click on THE GRID.

2. Review the DATA VIEW selection, which defaults to Current Data View. If necessary, click on Future to access a date that occurs after the last date in the Current Data View, or click on History to access a date that occurs before the first date in the Current Data View.

3. Review the DISPLAY MODE selection. To view one advisor's schedule for multiple dates, click on BY ADVISOR ▼ and select the individual's name. To view multiple advisors' schedules for a given date, click on BY DATE ▼ and select the desired date.

   Tip
   If it is necessary to find a date in Future Data View while in DISPLAY MODE BY ADVISOR, use the jump button or the >> next page or << previous page features to move quickly to dates that are not shown on THE GRID..

4. To view only those individuals associated with a particular specialty, click SPECIALTY ▼ and then on the desired option.

5. Double-click anywhere within the available appointment cell (individual or group) to display the STUDENT APPOINTMENT screen.

   Tips
   If time increments of less than 30 minutes are being used, the desired appointment cell may not be visible on the screen. If the SPLIT THE GRID IN HALF option has been activated, use **F10** to toggle between two halves of THE GRID to find the appointment cell. If the SPLIT THE GRID IN HALF option has not been activated, scroll until the desired cell comes into view.

   If booking a student into a group appointment, first check to see if the appointment is full by resting the cursor on the group appointment cell. If spaces are available, a tool tip will indicate the number of spaces remaining, and also the Reason Codes(s) for the appointment (if that additional option has been selected for the tooltip setting for the Location). If the appointment is full, a red tool tip will state, "Spaces Remaining: 0" and the ROSTER will appear immediately after double-clicking on the cell. To accommodate a different number of students for this group appointment, use the Change feature on the ROSTER. (See "Change the Maximum Number of Students Allowed for a Group Appointment" in Part III, Section 13.2. Then return to the target cell on THE GRID and resume scheduling the appointment.)

6. Complete the following information on the STUDENT APPOINTMENT screen, using either the ENTER or the TAB key to move from field to field. The first two steps are required; the remaining steps are optional.

   a. Select one of the options below to enter the student's identifier.

- Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

- If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

- If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

- If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

Note
The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

Notes
If the appointment for this student will conflict with a pending appointment in any Location, a warning screen will be displayed. If users have GRID - ACCESS or VIEW STUDENT HISTORY permissions, they will be able to see the actual Location and Short Name for the conflicting appointment. In order to preserve student confidentiality, other users will see an asterisk (*) with the following message: "Details about the Location and Short Name are not available based on your permission level." Click on YES to proceed anyway, or click on NO to abort the appointment and find another time slot.

If the maximum number of appointments that a student is allowed to have for this Location would be exceeded by booking this appointment, a warning screen will be displayed notifying the schedulers that this appointment would cause the total number of appointments for this student to be exceeded. Click on YES if you want to override the Maximum Concurrent Appointments restriction.

Notes
If a student previously scheduled an appointment or if information about a student is stored in a school maintained database to which SARS·GRID has access, Name, and possibly Birth Date, Home and/or Contact Phone (if this information is in the database) will appear automatically after typing the identifier. However, the information must be stored in the database under the ID format that is being used.

If USE STUDENT CLASSES has been activated in SARS·UTIL, a Course Selection screen will be displayed after the student's ID is entered. The screen will list all the classes in which the student is enrolled. To add those classes to the Reason Codes list:
(i) Click on one or more classes to be included as Reason Codes.
(ii) Click on SELECT.
The selected courses will be placed at the top of the Reason Code list and will be available for selection as reasons for the appointment.

Note
If USE SHORT NAME ASSIGNMENTS has been activated on the Miscellaneous Settings screen in SARS·UTIL (see Section 4.5 in Part I) and the appointment is being made with an advisor other than the advisor to whom the student has been assigned, a warning/confirmation message will be displayed. To proceed to make the appointment with the unassigned individual, click on YES. Otherwise, click on NO and return to THE GRID and make the appointment with the assigned individual.

b. Type the student's LAST NAME, FIRST NAME in NAME (for example, SMITH, JOHN). The last name first method will render reports sorted by student names more usable.

c. Type the student's birth date in BIRTH DATE. (Birth year will accept 2 or 4 digits. The century defaults to 20 for years 00 to 29. The century defaults to 19 for years 30 to 99. To override the default, you must enter the 4-digit date.)

d. Type the student's permanent telephone number in HOME PHONE and any extension in EXTENSION.

e. Type the student's contact telephone number in CONTACT PHONE and any extension in EXTENSION.

f. Type the student's text phone number in TEXT PHONE, if the student has a cell phone with text messaging capabilities.

Note
The text option will be usable only if the college has a valid license for text messaging.

g. Click on the icon adjacent to ADDRESS INFORMATION and then type the student's street address, city, state, zip code, and e-mail address(es).

h. In the STUDENT CONTACT METHODS panel, ensure that the accepted methods for contacting the student (CALL, EMAIL and/or TEXT) are checked, based on the method(s) by which the student wishes to be contacted. If the email option is disabled, the student does not have an email address listed. If the Text option is disabled, either the student does not have a text phone number listed or the college does not have a valid license for text messaging.

i. Click on the selected options in the REASON CODE field. (Use the scroll bar if the list extends beyond the viewable screen.) A tool tip showing a description of the Reason Code will be displayed if the cursor is positioned over a Reason Code.

Notes
Click on + to display a screen showing all Reason Codes at a glance and to select one or more codes from that screen.

If you wish to generate statistical reports on the reasons why students request appointments, you must select one or more Reason Codes. Some systems may be set to require a Reason Code, and some systems may be set to Allow Multiple Reason Codes, and/or (for group appointments) clear reasons after each booking is completed.

j. Enter specific information about the reason for making the appointment in the COMMENTS field. The field will accept up to 255 characters.

Tip
Right click on the selected Reason Code to enter its corresponding full description in the Comments field.

k. Enter or edit the room number for this appointment if it differs from that which is displayed. If this is a group appointment and the room number field is blank or needs to be changed, click on ROSTER, enter the room number, and then return to the STUDENT APPOINTMENT screen.

l. To send an email receipt for the appointment, check the EMAIL RECEIPT option. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

m. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

n. Ensure that TEXT RECEIPT is checked to indicate that a confirmation of the appointment should be sent to the student via text messaging. If this field is enabled, and *Text Receipt* is checked, a text message will be sent to the student when an appointment is booked, moved or copied. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

o. If PULL FILE is checked, the appointment will be listed on the "All Appointments for a Day Report" as requiring files to be pulled. Check or uncheck the box as appropriate.

p. For additional options, click on MORE>>.

Note
If the student information is already stored in the database, the ADDITIONAL INFO, ALERT and STUDENT HISTORY options will be enabled. Otherwise, these options will only be made available after an appointment is committed. The availability of the ADDITIONAL INFO option is also dependent upon whether the system administrator has set it up for this Location.

q. If the ADDITIONAL INFO button is enabled, the user may view information about the student, and if permitted, also enter or change information about a student. Click on ADDITIONAL INFO to display the ADDITIONAL INFORMATION screen. Review or record the student's response to each question. Each question allows for a date, list, text or yes/no response. Click on SAVE to save new or changed information; click on CLOSE to exit without saving. (Also see "View or Record Additional Information" in this Part, Section 23.)

r. Any existing alerts about that student will pop up on your screen after the student's ID is entered. Any Early Alerts created in the SARS·ALRT application will pop up first, followed by any SARS·GRID alerts. If an Early Alert is displayed, click on TRANSFER REASONS to include those reasons in the student's appointment. (Also see "View or Record an Alert" in this Part, Section 22.)

Note
Users may view alerts for all Locations to which they have been assigned.

s. To link the topic of the current visit to a different term, as opposed to the current term (e.g., discussion of an Ed Plan for the next semester), click TERM ▼ and select the desired Term.

t. Review the INFO FLAGS panel to see whether the student has completed key actions toward matriculation goals.

7. Click on COMMIT APPOINTMENT. A COMMIT CONFIRMATION screen will appear if your school has chosen to use this option.

Notes
If you inadvertently click on CLOSE rather than on COMMIT APPOINTMENT, the appointment information will not be discarded unless you confirm that you want to discard the appointment information.

a. To proceed with the action, click on YES. Otherwise, click on NO and advise the student of the conflicting appointment.

b. [If initials are required] Enter your name or initials.

For an individual appointment, the booked appointment Schedule Code will appear in the selected time slot on MY GRID. For a group appointment, the Schedule Code that allows for a group appointment remains in the time slot on MY GRID and the appointment record for the student is added to the Roster. For both types of appointments, the appointment record for the student will be added to STUDENT HISTORY.

8. For a group appointment, repeat steps 6 and 7 to book other students in the same scheduling session. When done, click on CLOSE.

Tips
To extend or unextend an appointment, see “Extend and Unextend an Appointment Slot” in Section 19.4, in this Part.

If you did not print a receipt before committing an appointment, double-click on the scheduled appointment cell. The STUDENT APPOINTMENT screen will be displayed. Click on MORE>>. For an individual appointment, click on REPRINT RECEIPT. For a group appointment, first click on ROSTER, click on the student’s name, and then click on REPRINT RECEIPT.

Note
[For individual appointments] From time to time, “Reserv” may be displayed in a cell. “Reserv” normally indicates that the appointment is no longer available because it is in the process of being scheduled by another user. Once the appointment is committed, “Reserv” is replaced with the booked appointment schedule code. If the scheduling action does not complete, “Reserv” will continue to be displayed in the cell. In this instance, click on REFRESH. If the cell does not change, use the QUICK DAY CHANGE screen to reset the cell to its original appointment. Click on the cell on the QUICK DAY CHANGE screen that displays “Reserv.” You will be asked whether you want to re-set the appointment. Click on YES.

More Information

An occasional Saturday (or Sunday) may be added to THE GRID and made available for scheduling. (See “Add an Occasional Saturday or Sunday” in Part 1, Section 5.6.3.)

19.2 Search for a Student's Identifier When Making an Appointment

If the student does not know his/her ID, or provides an incorrect identifier, or the scheduler enters an incorrect ID, follow the steps below. This function allows the scheduler to find a database match for the student's name and the identifier if the student previously scheduled an appointment or if student data from an external source has been loaded in the database being used.

1. On THE GRID, double-click on the available appointment cell to display the STUDENT APPOINTMENT screen.

2. If the student's ID is not known, type the student's name or a portion thereof in NAME and click on SEARCH.

   a. If matches are not found, a notification message will be displayed.

   b. If only one match is found, the student's ID and, if existing, BIRTH DATE, HOME PHONE, and CONTACT PHONE will be displayed.

   c. If more than one match is found, a list of all students with that name will appear (on the SEARCH RESULTS screen).

      i) Click on the name from the list.

      ii) Click on OK. Information about that student will be displayed in ID and NAME and possibly BIRTH DATE, HOME PHONE, and CONTACT PHONE if this information is in the database.

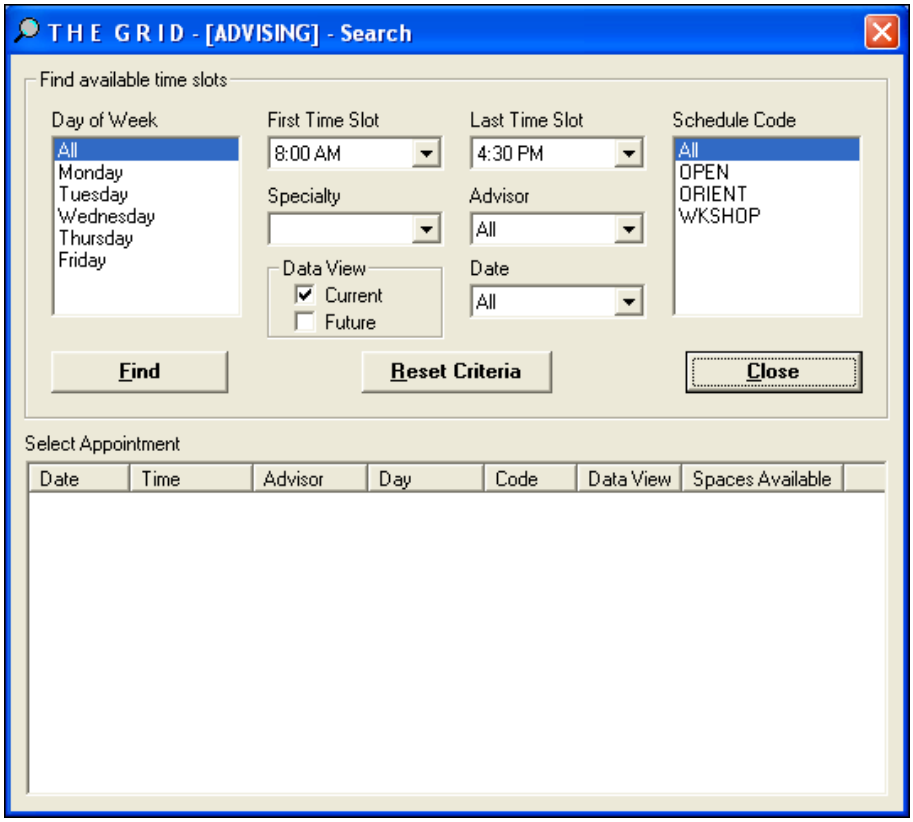
3. The cursor is positioned in the REASON CODE field. Proceed with entering information to make an appointment.

19.3 Search for an Available Appointment Slot

1. From THE GRID, right-click to display the COMMAND MENU.

2. Click on SEARCH FOR APPOINTMENT.

A screen will appear that looks like this:



3. Click on one or more days, or on ALL, in DAY OF WEEK.

   -or-

   Click on DATE ▼ and select the specific date that the student requests.

4. Click on FIRST TIME SLOT ▼ and select the earliest time slot that the student wishes an appointment to begin.

5. Click on LAST TIME SLOT ▼ and select the latest time slot that the student requests an appointment to begin.

6. [Optional] Click on SPECIALTY ▼ and select the desired specialty group (e.g., Spanish-speaking) to limit the choices to that group.

7. Click on ADVISOR ▼ and select the desired advisor.

8. In the DATA VIEW panel, click on CURRENT to search for appointments in the Current Date View or click on FUTURE to search for appointments in the future Data View, or click on both to expand the search.

Note
Selecting both CURRENT and FUTURE will display all available appointments in the CURRENT DATA VIEW plus up to 100 additional appointment slots in the FUTURE DATA VIEW.

9. Click on one or more Schedule Codes, or on ALL, in the SCHEDULES CODES field to search for the desired appointment allowable slots. If the Schedule Code is for an individual appointment, only available slots will be displayed.

10. Click on FIND to display a list of available appointments that will satisfy the selection criteria.

11. Double-click on the selected entry from among those listed. The STUDENT APPOINTMENT screen will appear.

12. Enter the applicable information on the STUDENT APPOINTMENT screen. Click on COMMIT APPOINTMENT. Type your name or initials in response to the prompt and then press ENTER or click on YES to return to the SEARCH screen.

13. Click on CLOSE to exit the SEARCH screen, or click on RESET CRITERIA to clear the screen and select other criteria.

19.4 Extend and Un-extend an Appointment

Some group appointment Schedule Codes (e.g., WORKSHOP) may have varying durations. When setting up the system, it was recommended that such Schedule Codes be assigned the shortest likely duration, because the specific activity may later be extended. There are 3 methods for extending the length of an appointment when the cell(s) below are appointment allowable.

The first method is preferred when booking an individual appointment. The second and third methods are recommended only if the appointment has already been booked and the scheduler is returning to the appointment to extend it after the fact and for group appointments.

19.4.1 Extend

1. [For individual appointments] On the STUDENT APPOINTMENT screen:

   a. Click on MORE>> to display the right-hand side of the screen.

   b. Click on EXTEND.

   c. Repeat as necessary.

   Tip
   If the option has been selected to print both the start and stop time of the appointment, extend the appointment before committing it so that the entire appointment duration is printed on the receipt.

2. On THE GRID:

   a. Left-click to place the focus on the cell that contains the scheduled appointment.

   b. Right-click to display the COMMAND MENU.

   c. Left-click on EXTEND APPOINTMENT.

   d. Repeat as necessary.

3. On THE GRID after booking the appointment:

a. Left-click on the cell that contains the scheduled appointment.

b. Press **Alt+E**.

c. Repeat as necessary.

Remember to reprint the receipt if the computer has been configured to display both appointment start and end times on receipts.)

19.4.2 Un-extend

An extended appointment may be shortened one cell at a time using one of the following three methods:

1. For an individual appointment, use the STUDENT APPOINTMENT screen. Click on MORE>> to display the right-hand side of the screen. Then click on UNEXTEND APPOINTMENT. Repeat as needed.

   -or-

2. On THE GRID, left-click to place the focus on any cell within the scheduled individual or group appointment. Then right-click to display the COMMAND MENU. Then left-click on UNEXTEND. Repeat as needed.

   -or-

3. On THE GRID, left-click to place the focus on any cell within the scheduled individual or group appointment. Press **Alt+U** to unextend the appointment one cell. Repeat as needed.

Depending upon the option selected by your school, either the Schedule Code that previously resided in the cell on THE GRID will be returned, or the Replacement Code will be inserted in the cell.

19.5 Move a Scheduled Appointment

A student may be moved from one group appointment to another, from one group appointment to an individual appointment, or from an individual appointment to a group activity. Individual appointments may be moved to another appointment slot for the same Location or a different Location. However, when moving an appointment to a different Location, the associated Reason Codes will <u>not</u> be moved with it.

19.5.1 Move from an Individual Appointment

1. On THE GRID, left-click on the cell that contains the scheduled appointment.

Tip
Rest the cursor over the booked appointment cell. The tool tip will display the number of spaces remaining, and the Reason Codes(s) for the appointment, or some combination of the above, depending on the tooltip setting established for the Location.

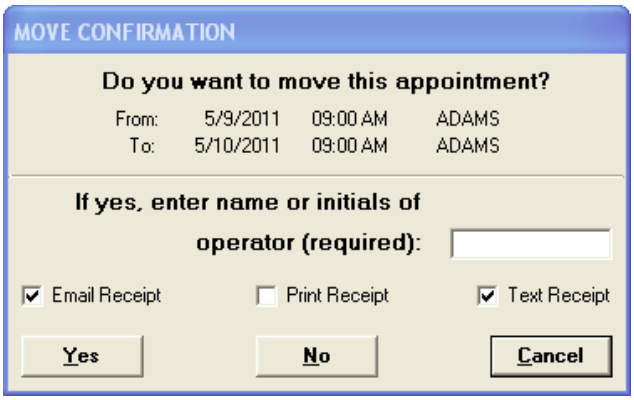
2. Right-click to display the COMMAND MENU.

3. Left-click on MOVE APPOINTMENT. The cursor will change to display the word "Move.

"

Tip
Right click to cancel the move action. Click on YES in response to the message, "Appointment move in process. Do you want to cancel the move?" The original appointment will be retained.

4. Double-click on the cell to which the appointment is to be moved. A MOVE CONFIRMATION screen will be displayed. Here is an example:



a. [If initials are required] Enter your name or initials.

b. To send an email receipt for the appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

d. To send a text message for the appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

e. Click on YES.

19.5.2 Move from a Group Appointment

1. On THE GRID, double-click on the group appointment cell to display the STUDENT APPOINTMENT screen. (If the appointment is at capacity, the ROSTER will appear immediately. Skip to step 3.)

Tip
Rest the cursor over the group appointment cell. If spaces are available, a tool tip will indicate the number of spaces remaining, and also the Reason Codes(s) for the appointment (if that additional option has been selected for the tooltip setting for the Location.

2. Click on MORE>>; then click on ROSTER. The students who are scheduled for the appointment will be listed alphabetically by last name.

3. Click on the student for whom the appointment is being moved.

4. Click on MOVE. THE GRID will be displayed, and the cursor will change to display the word "Move".

5. Double-click on the cell to receive the student.

6. When the MOVE CONFIRMATION screen appears,

   a. [If initials are required] Enter your name or initials.

   b. To send an email receipt for the appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

   c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

   d. To send a text message for the appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

   e. Click on YES. The appointment will be moved to the new cell on THE GRID. Depending upon the option selected by your college, either the former Schedule Code or the Replacement Code will be inserted in the cell that previously contained the scheduled appointment.

Note
From time to time, "Moving" may be displayed in a cell. "Moving" indicates that the appointment is in the process of being moved from one cell to another. If the action does not complete, "Moving" will continue to be displayed in the original cell. In this instance, click on REFRESH. If the cell does not change, use the QUICK DAY CHANGE screen to reset the cell to its original appointment. Click on the cell on the QUICK DAY CHANGE screen that displays "Moving." You will be asked whether you want to reset the appointment. Click on YES.

19.6 Move a Group Appointment to another Time Slot

A group appointment Schedule Code and all of the appointments booked for that activity may be moved in their entirety to another date and/or time. This option is available only if at least one student is already booked for this activity. A group appointment may also be moved to a different Location; however, the associated Reason Codes will not be moved with it to the new Location. To move a student from a group activity, see "Move a Scheduled Appointment" in Section 19.5 above.

1. On THE GRID, left-click on the cell that contains the group activity.

2. Right-click to display the COMMAND MENU.

3. Left-click on MOVE APPOINTMENT. The cursor will change to display the word "Move."

Tip
Right click to cancel the move action. Click on YES in response to the message, "Appointment move in process. Do you want to cancel the move?" The original appointment will be retained.

4. Double-click on the cell to which the activity is to be moved.

5. When the MOVE CONFIRMATION screen appears,

   a. [If initials are required] Type your name or initials.

   b. Ensure that EMAIL RECEIPT is checked if you want to send email confirmations of this moved group appointment to each student on the roster who has an email address and has opted to receive email confirmations.

   c. Ensure that PRINT RECEIPT is checked if you want to hand out or mail written confirmations.

   d. Ensure that TEXT RECEIPT is checked if you want to send text confirmations of this moved group appointment to each student on the roster who has a text phone and has opted to receive text confirmations. If the student does not have a text phone or the college does not have the text messaging software license, the TEXT option will be disabled.

   e. Click on YES. The activity will be moved to the new cell on THE GRID. Depending upon the option selected by your college, either the former Schedule Code or the Replacement Code will be inserted in the cell that previously contained the group activity.

Note
From time to time, "Moving" may be displayed in a cell. "Moving" indicates that the activity is in the process of being moved from one cell to another. If the action does not complete, "Moving" will continue to be displayed in the original cell. In this instance, click on REFRESH. If the cell does not change, use QUICK DAY CHANGE to reset the cell to its original activity. Click on the cell on the QUICK DAY CHANGE screen that displays "Moving." You will be asked whether you want to reset the group activity. Click on YES.

19.7 Copy a Student to Another Time Slot

A student appointment may be copied to and from another individual or group appointment slot for the same or a different Location. However, when copying an appointment to a different Location, the associated Reason Codes will not be copied with it. The copy function retains the student in the original appointment.

19.7.1 Copy from an Individual Appointment

1. On THE GRID, left-click on the cell that contains the scheduled appointment.

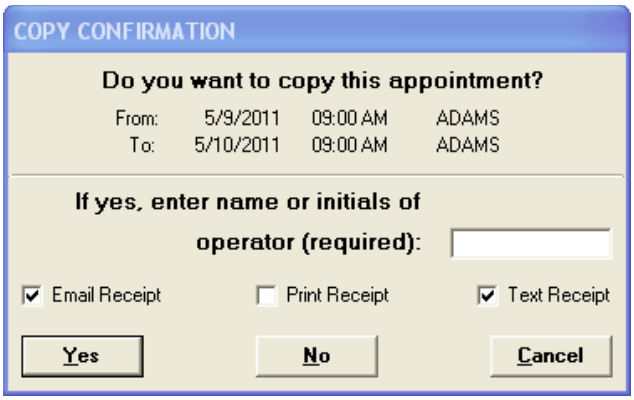
Tip
Rest the cursor over the booked appointment cell. The tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tooltip setting established for the Location.

2. Right-click to display the COMMAND MENU.

3. Left-click on COPY APPOINTMENT. The cursor will change to display the word "Copy".

Tip
Right click to cancel the action. Click on YES in response to the message, "Appointment copy in process. Do you want to exit the copy function?" The original appointment will be retained.

4. Double-click on the appointment cell to receive the student. (Either a group or individual appointment cell may be selected.). A COPY CONFIRMATION screen will be displayed. Here is an example:



a. [If initials are required] Enter your name or initials.

b. To send an email receipt for the appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

d. To send a text message for the appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

e. Click on YES. The appointment will be copied to the new time slot on THE GRID or, in the case of a group appointment, the student will be added to the Roster.

5. To make more appointments for the <u>same</u> student, repeat steps # 3 - 4. When done, right-click. A message will appear asking if you wish to cancel the copy process. Click on YES to return to THE GRID.

19.7.2 Copy from a Group Appointment

1. On THE GRID, double-click on the group appointment cell to display the STUDENT APPOINTMENT screen. (If the appointment is at capacity, the ROSTER will appear immediately. Skip to step 3.)

2. Click on MORE>>; then click on ROSTER. The students who are scheduled for the appointment will be listed alphabetically by last name.

3. Click on the student to be copied to another appointment.

4. Left-click on COPY. The cursor will change to display the word "Copy".

Tip
Right click to cancel the action. Click on YES in response to the message, "Appointment copy in process. Do you want to exit the copy function?" The original appointment will be retained.

5. Double-click on the appointment cell to receive the student. (Either a group or individual appointment cell may be selected.)

6. When the COPY CONFIRMATION screen appears,

   a. [If initials are required] Enter your name or initials.

   b. To send an email receipt for the appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

   c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

   d. To send a text message for the appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

   e. Click on YES. The appointment will be copied to the new cell on THE GRID or, in the case of a group appointment, the student will be added to the Roster.

7. To make more appointments for the <u>same</u> student, repeat steps 5 - 6. When done, right-click. A message will appear asking if you wish to cancel the copy process. Click on YES to return to THE GRID.

Note
From time to time, "Cpying" may be displayed in a cell. "Cpying" indicates that the appointment is in the process of being copied to other cells. If the action does not complete, "Cpying" will continue to be displayed in the original cell. In this instance, click on REFRESH. If the cell does not change, use the QUICK DAY CHANGE screen to reset the cell to its original appointment. Click on the cell on the QUICK DAY CHANGE screen that displays "Cpying." You will be asked whether you want to reset the appointment. Click on YES.

19.8 Copy a Group Appointment to another Group Time Slot

All students in a group appointment may be copied to another group appointment by using the Command Menu. The associated Reason Codes will be copied to the new Location. The copy function retains the students in the original group activity, as well. The target group appointment duration may differ from the duration of the source group appointment.

1. On THE GRID, right-click on the group appointment cell that is to be copied. The COMMAND MENU will be displayed.

2. Click on COPY APPOINTMENT.

Tip

To view more than one day at a time, click on MULTIPLE DATES.

3. Double-click on the group appointment slot that will be receiving the copied information. All students that were registered for the initial appointment, as well as the associated Reason Code(s), will be placed in the new group appointment slot, with the following exceptions:

   a. If a student name from the copied appointment already exists in the receiving appointment, it will not be copied.

   b. If the receiving appointment does not have enough slots remaining to accept all of the students being copied, a warning message will be displayed. In such a case, the maximum number of students allowed may be increased on the Roster.

4. To complete the Copy function, right-click on the appointment cell that received the copied information. A confirmation message will be displayed.

   a. [If initials are required] Enter your name or initials.

   b. To send an email receipt for the appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

   c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

   d. To send a text message for the appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

5. Click on YES.

19.9 Send a Student to the Drop-in Screen

Users may either move students with a scheduled appointment to the Drop-in Screen for a drop-in visit or copy them to the Drop-in Screen. Moving a student will remove that name from THE GRID, whereas copying a student will retain the name on both the Drop-in Screen list and THE GRID.

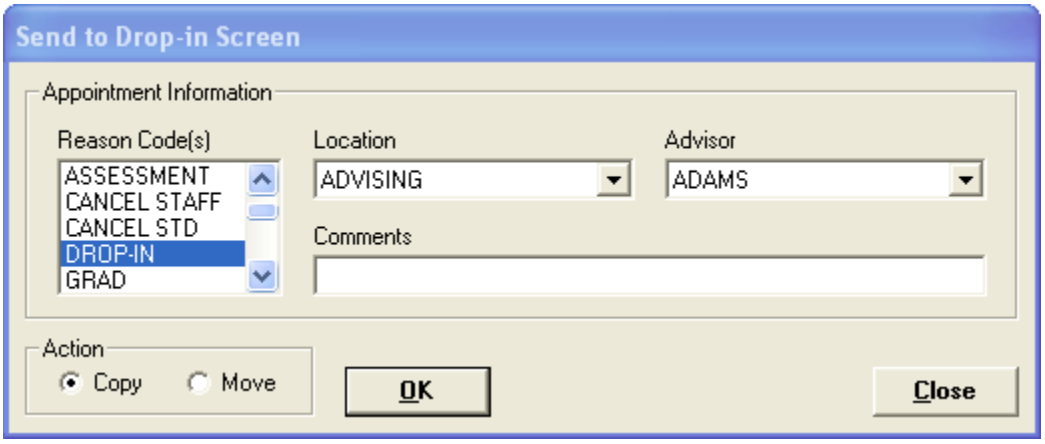
1. On THE GRID, left-click on the cell that contains the scheduled appointment.

   Tip
   Rest the cursor over the booked appointment cell. The tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tooltip setting established for the Location.

2. For an individual appointment, right-click to display the COMMAND MENU. Then left-click on SEND TO DROP-IN SCREEN.

3. For a group appointment, from the Roster, click on the student name to be copied or moved. Then click on SEND TO DROP-IN SCREEN.

Here is an example of the screen:



The options are:

- APPOINTMENT INFORMATION

  REASON CODE(S): Use to select the reason associated with the drop-in visit.

  LOCATION: Use to select the Drop-in Location.

  ADVISOR: Use to select the advisor to which the student should be referred, or select Next for the student to see the next available advisor.

  COMMENTS: Use to type in any relevant comments.

- ACTION

  COPY: Use to transfer a selected student from THE GRID to the Drop-in Screen for a drop-in visit while retaining the student's individual appointment.

  MOVE: Use to transfer a selected student from THE GRID to the Drop-in Screen for a drop-in visit <u>without</u> retaining the student's individual appointment.

- OK: Use to approve the action.

- CLOSE: Use to exit the screen.

4. In the REASON CODE(S) field, click on the desired Reason Code.

5. Click on LOCATION ▼ and select the drop-in Location.

6. Click on ADVISOR ▼ and select either NEXT to have the student see the next available advisor, or click on the name of the advisor that the student should see.

7. Click on COMMENTS and type in any relevant comments.

8. To place the student on the Drop-in Screen while retaining that student's individual appointment on THE GRID, click on COPY. A confirmation message will be displayed.

   a. Click on YES to proceed, or

   b. Click on NO to cancel the action.

9. To send the student to the Drop-in Screen and also remove that student's appointment on THE GRID, click on MOVE. A confirmation message will be displayed.

   a. Click on YES to proceed, or

   b. Click on NO to return to the previous screen, or

   c. Click on CANCEL to cancel the action.

19.10 Change Information about an Appointment

You may change all the information on the STUDENT APPOINTMENT screen except for the identifier. To change the ID, use the STUDENT MAINTENANCE screen in SARS·UTIL. (See "Modify Data about a Student, Including Changing an ID" in Part VII, Section 44.2.)

1. On THE GRID, double-click on the cell that contains the scheduled appointment. The information that was previously entered for that appointment will be displayed on the STUDENT APPOINTMENT screen.

2. Change the information as desired.

3. Click on CLOSE. A confirmation message will be displayed.

4. Click on YES.

19.11 Cancel an Appointment

If a student cannot remember the appointment date or time, click on STUDENT HISTORY. Enter the student's ID or name. Click on JUST APPOINTMENTS. Then double-click on the appointment to be canceled to display the STUDENT APPOINTMENT screen.

19.11.1 Individual Appointment

1. On THE GRID, double-click on the cell that contains the scheduled appointment. The information that was previously entered for that appointment will be displayed on the STUDENT APPOINTMENT screen.

   Tip
   Rest the cursor over the booked appointment cell. The tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tooltip setting established for the Location.

2. In the REASON CODE field, de-select the reasons for making the appointment.

3. Click on the reason for the cancellation. (Use the scroll bar if the list extends beyond the viewable screen.) A tool tip showing a description of the Reason Code will be displayed if the cursor is positioned over a Reason Code.

Note
To generate statistical reports on the reasons why students cancel appointments, one or more Reason Codes must be selected. Some systems may be set to require a Reason Code, and some systems may be set to Allow Multiple Reason Codes.

4. Click on CANCEL APPOINTMENT. A confirmation screen will be displayed.

   a. If your name or initials are required, type them in the space provided on the CANCELLATION CONFIRMATION screen, then press ENTER or click on YES.

   -or-

   b. If your name or initials are not required, you will be asked to confirm whether you want to cancel the appointment. Click on YES. The appointment will be cancelled, and a cancellation record for the student will be added to STUDENT HISTORY. Depending upon the option selected by your Location, either the Schedule Code that previously resided in that cell on THE GRID will be returned or the Replacement Code will be inserted in the cell.

Note
If an appointment is cancelled within five minutes of its initial booking, the user will be required to enter his or her User Name (not just initials) to confirm the cancellation. That User Name must match the User Name of the person whose sign-in was current at the time the appointment was booked.

Tip
If you make a mistake in canceling an appointment, immediately click on UNDO from THE GRID to restore the appointment. UNDO reverses the last appointment cancellation made on the same PC used to make the cancellation, but only during the immediate work session and only if the appointment slot is still available. If the appointment slot is not available, the name of the student will be displayed so that you can re-schedule that student in another available slot.

19.11.2 Group Appointment

1. On THE GRID, double-click on the group appointment cell. If the appointment has vacancies, the STUDENT APPOINTMENT screen will be displayed. If the appointment is at maximum capacity, the ROSTER will be displayed immediately, so skip to step 3.

Tip
Rest the cursor over the group appointment cell. If spaces are available, a tool tip will indicate the number of spaces remaining, and also the Reason Codes(s) for the appointment (if that additional option has been selected for the tooltip setting for the Location).

2. From the STUDENT APPOINTMENT screen, click on MORE>>; then click on ROSTER. The students who are scheduled for the appointment will be listed alphabetically by last name.

3. To cancel the appointment for one or more (but not all) students on the list:

a. While pressing the Control key, click on each student for whom the appointment is being cancelled.

Note
To cancel all students on the Roster, highlight the first name. Then, while pressing the Control and Shift keys simultaneously, click on last name to be cancelled.

b. In the REASON CODE field, de-select the reasons associated with the appointment.

c. Click on the reason for the cancellation. (Use the scroll bar if the list extends beyond the viewable screen.)

d. Click on CANCEL STUDENT(S). A confirmation screen will be displayed.

e. If your name or initials are required, type them in the space provided on the CANCELLATION CONFIRMATION screen, then press ENTER or click on YES.

-or-

f. If your name or initials are not required, you will be asked to confirm whether you want to cancel the appointment. Click on YES. The appointment will be cancelled, and a cancellation record for the student will be added to STUDENT HISTORY. The Schedule Code that allows for a group appointment will remain in the cell on THE GRID, and the cancelled slot will become available for another student.

Note
If an appointment is cancelled within five minutes of its initial booking, the user will be required to enter his or her User Name (not just initials) to confirm the cancellation. That User Name must match the User Name of the person whose sign-in was current at the time the appointment was booked.

19.12 Make Recurring Appointments

A simple method exists for scheduling multiple, recurring appointments for one advisor at a time. Scheduling recurring appointments is useful for advisors or other staff who see students for appointments on a regular basis.

Two methods exist for scheduling recurring appointments:

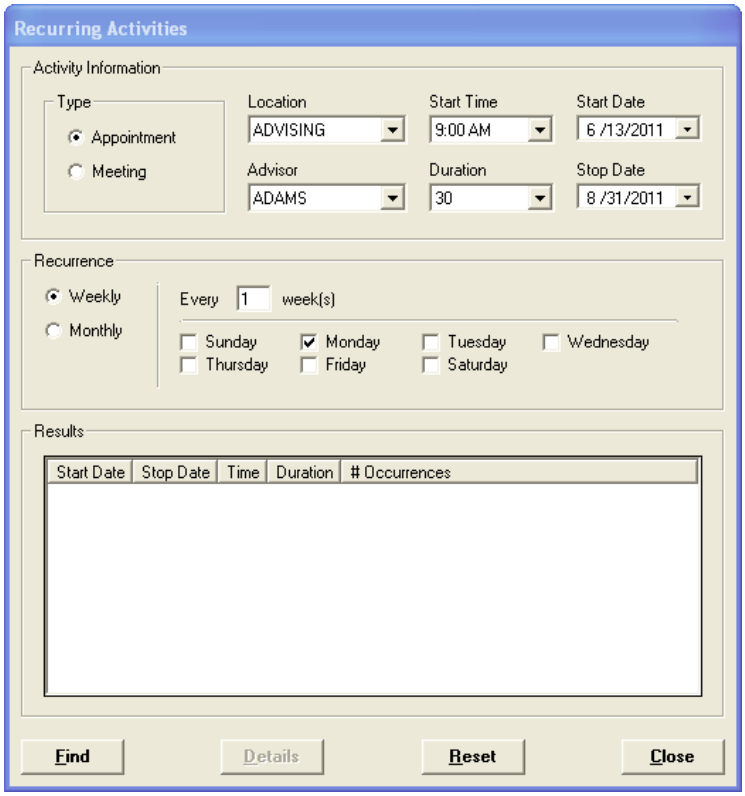
Using the RECURRING ACTIVITIES option.
Using the COPY function (see Section 19.7, above).

Both of these options are available from the COMMAND MENU on THE GRID.

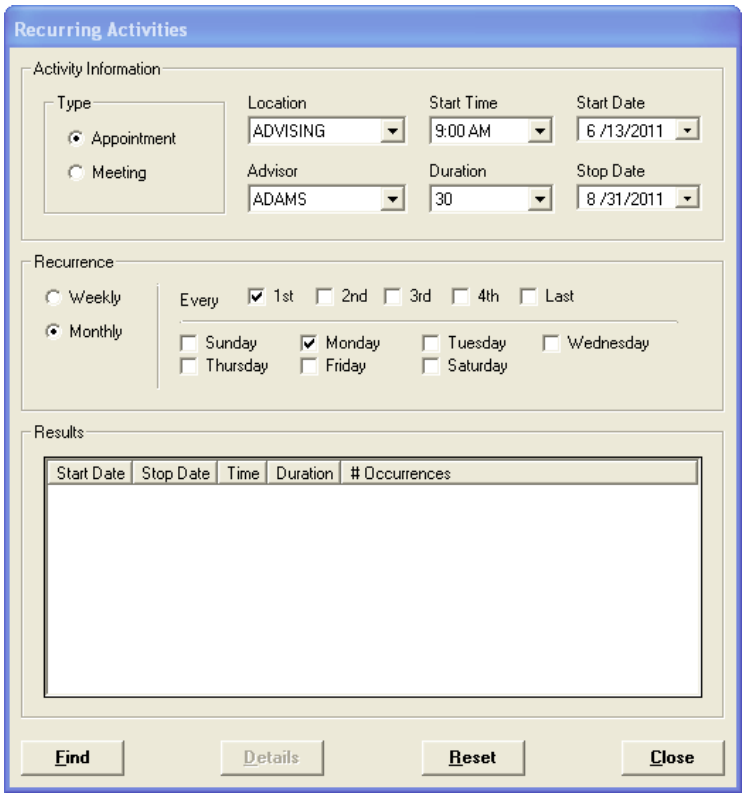
1. From THE GRID, right click from any cell to display the COMMAND MENU.

2. Click on RECURRING ACTIVITIES to display a RECURRING ACTIVITIES screen.

Here is an example of the screen for Weekly Recurrences with Appointment selected:



Here is an example of the screen for Monthly Recurrences with Appointment selected:



The options are:

- ACTIVITY INFORMATION:

TYPE – APPOINTMENT:	Use to select the option to schedule a recurring appointment.
TYPE – MEETING:	Use to select the option to schedule a recurring meeting.
LOCATION:	Use to select the Location for which the advisor's schedule is associated.
ADVISOR:	Use to select the advisor for whom a recurring appointment or meeting is to be scheduled. This field label is dynamic, so the label may vary depending on the Short Name Label assigned to this Location.
START TIME:	Use to select the time at which the recurring appointment or meeting will begin.
DURATION:	Use to select the length of time needed for the recurring appointment or meeting.
START DATE:	Use to select the earliest date for which the recurring appointment or meeting will be scheduled.
STOP DATE:	Use to select the latest date for which the recurring appointment or meeting will be scheduled.

- RECURRENCE:

WEEKLY:	Use to select the option to schedule a weekly appointment or meeting.
EVERY __ WEEK(S):	Use with the WEEKLY option to select the frequency of the weekly appointment or meeting to be scheduled.
MONTHLY:	Use to select the option to schedule a monthly appointment or meeting.
1st (occurrence):	Use with the MONTHLY option to schedule the appointment or meeting on the first specified day of the month.
2nd (occurrence):	Use with the MONTHLY option to schedule the appointment or meeting on the second specified day of the month.
3rd (occurrence):	Use with the MONTHLY option to schedule the appointment or meeting on the third specified day of the month.

4th (occurrence):	Use with the MONTHLY option to schedule the appointment or meeting on the fourth specified day of the month.
LAST (occurrence):	Use with the MONTHLY option to schedule the appointment or meeting on the last specified day of the month.
SUNDAY:	Use to schedule the appointment or meeting on a Sunday.
MONDAY:	Use to schedule the appointment or meeting on a Monday.
TUESDAY:	Use to schedule the appointment or meeting on a Tuesday.
WEDNESDAY:	Use to schedule the appointment or meeting on a Wednesday.
THURSDAY:	Use to schedule the appointment or meeting on a Thursday.
FRIDAY:	Use to schedule the appointment or meeting on a Friday.
SATURDAY:	Use to schedule the appointment or meeting on a Saturday.
• RESULTS:	Used to display those schedules that meet the selected criteria.
• FIND:	Use to display results for the selected criteria.
• DETAILS:	Use to display all details for a selected result.
• RESET:	Use to clear the RECURRENCE panel for new entries.
• CLOSE:	Use to exit the screen.

3. In the ACTIVITY INFORMATION panel,

   a. Click on APPOINTMENT.

   b. Click on LOCATION ▼ and select the location containing the advisor's schedule to be searched for eligible appointment dates.

   c. Click on ADVISOR ▼ and select the name of the advisor for whom the recurring appointments are to be scheduled.

   d. Click on START TIME ▼ and select the time at which the recurring appointment will begin.

   e. Click on DURATION ▼ and select the length of time needed for the appointment.

f. Click on the START DATE field and type in the first date on which a recurring appointment will be scheduled, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

g. Click on the STOP DATE field and type in the last date on which a recurring appointment will be scheduled, or click on ▼ to use the Date Picker.

4. In the RECURRENCE panel,

a. Click on WEEKLY to schedule the appointment on a weekly basis. Then,

i) Click on EVERY __ WEEK(S) and type in the frequency of the weekly appointment.

ii) Click on the specific day(s) of the week on which the weekly appointment will be scheduled. More than one day may be selected.

[**Example**: Selecting **Weekly > Every 2 Weeks > Monday** will return results for every other Monday, starting the next Monday that occurs after today.]

-or-

b. Click on MONTHLY to schedule the appointment on a monthly basis. Then,

i) Click on 1st, 2nd, 3rd, 4th, or LAST to specify the day of the month the appointment is to be scheduled.

ii) Click on the specific day(s) of the week on which the monthly appointment will be scheduled. More than one day may be selected.

[**Example**: Selecting **Monthly > 2nd > Monday** will return results for the second Monday of every month, starting the next second Monday.]

5. Click on FIND. The RESULTS panel will display all possible options. Here is an example:

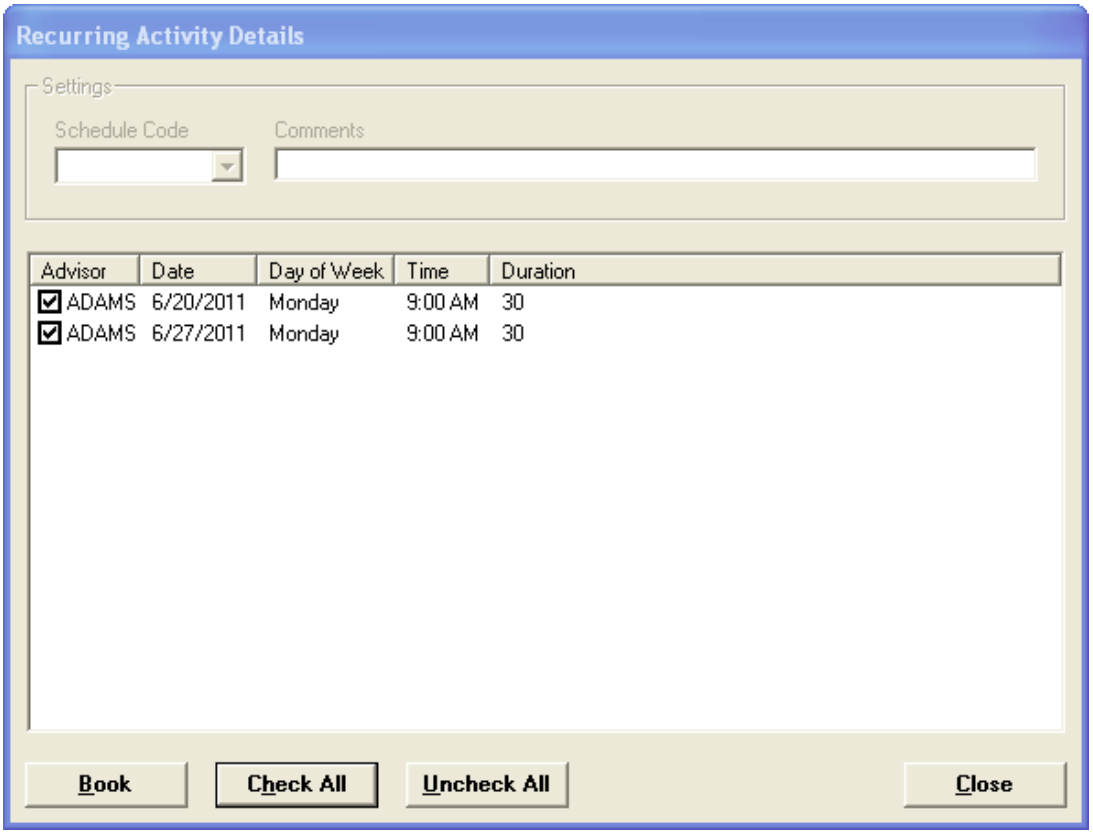
Results

Start Date	Stop Date	Time	Duration	# Occurrences
6/20/2011	6/27/2011	9:00 AM	30	2
7/11/2011	8/29/2011	9:00 AM	30	8

The Results panel displays the START DATE, STOP DATE, START TIME, DURATION, and the # OCCURRENCES that were found for the selected advisor and Location.

Note
If a date meeting the specified criteria is unavailable, the system ignores it. Separate results will be returned for date ranges that are broken by an unavailable date.

6. Click on the desired line(s) on the RESULTS panel and then click on DETAILS to display a RECURRING ACTIVITY DETAILS screen. More than one line may be selected by pressing the Control key when clicking. Here is an example:



The options are:

- SCHEDULE CODE: [Enabled only when MEETING is selected.] Use to select the Schedule Code to be used as the replacement code for the recurring meeting (e.g., MTG).
- COMMENTS: [Enabled only when MEETING is selected.] Use to type in relevant comments or a description of the recurring meeting (e.g., Weekly Staff Meeting).
- BOOK: Use to book the selected dates and times.
- CHECK ALL: Use to select all of the dates shown.
- UNCHECK ALL: Use to deselect all of the selected dates.
- CLOSE: Use to exit the screen without completing the booking.

a. Disregard the SCHEDULE CODE and COMMENTS fields.

b. Review the detailed returns in the data panel. These represent the dates on which a recurring appointment may be scheduled.

c. Click on the desired checkbox(es) to book those dates and times for the recurring appointment.

Hint
Click on CHECK ALL to select all boxes with one click. Click on UNCHECK ALL to deselect all boxes with one click.

d. When all possible dates have been selected for the recurring appointment, click on BOOK.

e. Click on YES in response to the confirmation request. This action brings up the STUDENT APPOINTMENT screen, on which the details of the appointment may be booked.

SECTION 20 — APPOINTMENT ATTENDANCE

20.0 Overview

This section discusses methods for recording student attendance, as follows:

20.1 Record Attendance for One Student at a Time

20.2 Record Attendance for Several Students in One Step

20.3 Record Attendance for a Group Appointment

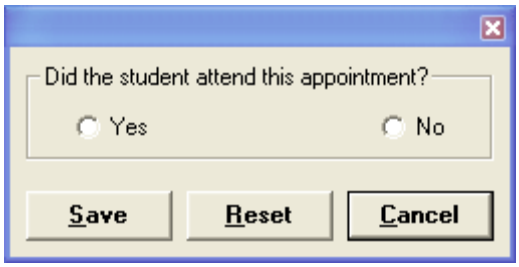
The Student Attendance feature serves two major purposes:

- To gather statistics on attendance status that may be important for internal and external reporting.
- To notify an advisor that a student has arrived for a scheduled appointment. This feature is available only if the automatic notification feature has been enabled and the default appointment attendance status is unmarked. Additionally, the clock on the PC being used to mark attendance must be accurate in order for advisors to receive their notifications.

The functioning of the Student Attendance feature is dependent on the initial setting for each appointment-allowable Schedule Code. If the school has chosen to mark all students automatically as having attended their appointments, non-attendance must be changed to NO manually. Conversely, if the school has chosen to mark all students automatically as having not attended their appointments, attendance must be changed to YES manually. The recommended method, NOT MARKED, requires that each student's attendance be recorded manually.

20.1 Record Attendance for One Student at a Time

1. On THE GRID, double-click on the cell that contains the scheduled appointment. This will display the STUDENT APPOINTMENT screen.
2. Click on ATTENDED. The following screen will appear:



3. Record or correct attendance status by clicking on YES or NO.
4. Click on SAVE.
5. Click on CLOSE to return to THE GRID.

Note
If the attendance status was marked inadvertently, click on RESET to restore the attendance status to UNMARKED.

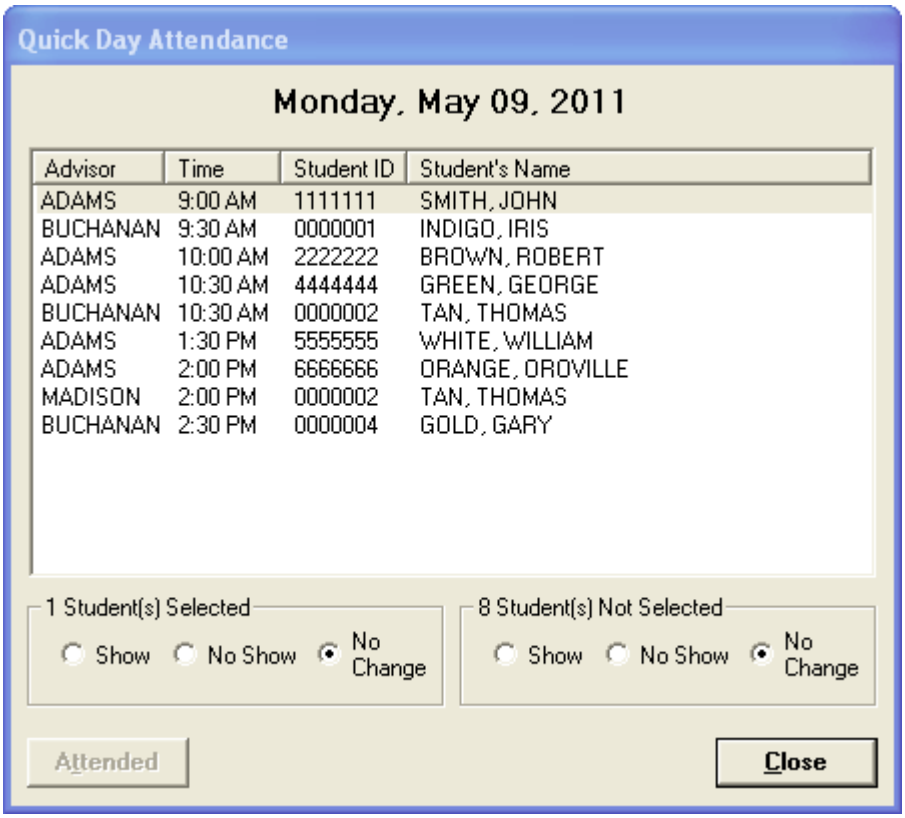
20.2 Record Attendance for Several Students in One Step

This screen will list only those students for whom attendance has not yet been marked as YES or NO.

1. On THE GRID, go to the desired date.

2. Right-click to display the COMMAND MENU.

3. Left-click on QUICK DAY ATTEND to display all of the individual appointments scheduled for that day for which attendance is not marked. Here is an example of the screen layout.



The options are:

- # STUDENT(S) SELECTED: Use to mark the attendance status of all students on the list whose names have been highlighted.

  SHOW: Use to mark that the selected student(s) attended the appointment(s).

  NO SHOW: Use to mark that the selected student(s) did not attend the appointment(s).

NO CHANGE: [the screen will default to this option] Use to leave the attendance unmarked.

- # STUDENT(S) NOT SELECTED: Use to mark the attendance status of all students on the list whose names have not been highlighted.

  SHOW: Use to mark that the de-selected student(s) attended the appointment(s).

  NO SHOW: Use to mark that the de-selected student(s) did not attend the appointment(s).

  NO CHANGE: [The screen will default to this option.] Use to leave the attendance unmarked.

- ATTENDED: Use to mark student attendance after the options have been selected. [This option is disabled until at least one line has been highlighted.]

- CLOSE: Use to exit the screen.

Note
If there are no unmarked appointments, the following message will appear, *The attendance for all appointments has already been marked.* Click on OK.

4. If one or more entries are listed, highlight either all of the entries for the students who attended or for the students who did not attend the appointment.

Tips
To highlight one or more names, hold down the control key while clicking on the names.

Highlight the fewer number of students. (For example, if 48 out of 50 students attended, highlight only the names of the two students who did not attend.)

   a. Click on the appropriate option (SHOW, NO SHOW, or NO CHANGE) for the group of selected names.

   b. Click on the appropriate option (SHOW, NO SHOW, or NO CHANGE) for the group of names that are not selected. The ATTENDED button will be enabled.

5. Click on ATTENDED. When finished, a confirmation message will be displayed.

6. Click on OK.

20.3 Record Attendance for a Group Appointment

The Student Attendance feature is available via THE GRID to users who have been assigned the access rights to THE GRID – ACCESS and THE GRID – SCHEDULE APPOINTMENTS.

The functioning of the Student Attendance feature is dependent on the initial setting for student attendance established by your school. If the school has chosen to mark all students automatically as having attended their appointments, non-attendance must be changed to NO manually. Conversely, if the school has chosen to mark all students automatically as having not attended their appointments, attendance must be changed to YES manually. The

recommended method, NOT MARKED, requires that each student's attendance be recorded manually. To manually record or change attendance of students at group appointments, perform the following steps:

1. On THE GRID, double-click on the group appointment cell. (If the appointment is at capacity, the ROSTER will be displayed immediately. Skip to step 4.) If the appointment is not full, the STUDENT APPOINTMENT screen will be displayed.

2. Click on MORE>>.

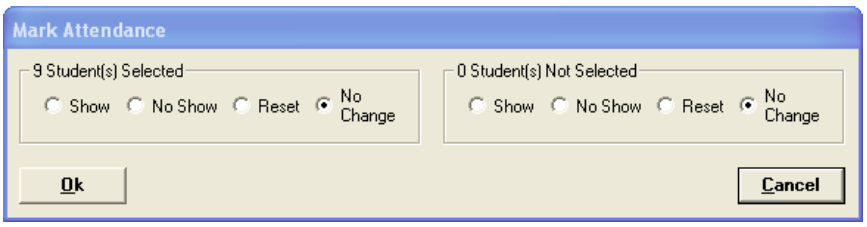
3. Click on ROSTER.

4. Highlight either all of the entries for the students who attended or for the students who did not attend the appointment.

Tips
To highlight more than one non-consecutive entry, hold down the control key while clicking on each name. To highlight consecutive entries, use the Shift key and then click on the first name and then on the last name to be included.

Highlight the fewer number of students. (For example, if 48 out of 50 students attended, highlight only the names of the two students who did not attend.)

5. Click on ATTENDED. A screen will appear that looks like this.



   a. Click on the appropriate option (SHOW, NO SHOW, RESET or NO CHANGE) for the group of selected names.

   b. Click on the appropriate option (SHOW, NO SHOW, RESET or NO CHANGE) for the group of names that are not selected.

6. Click on OK. When finished, a confirmation message will be displayed.

7. Click on OK and then on CLOSE to return to THE GRID.

Tip To change the attendance status for just one student, select the attendance status for that individual. Leave the rest of the students as No Change. Click on OK.

SECTION 21 — DROP-INS

21.0 Overview

The Drop-in Screen was introduced in Section 14, Part III. This section discusses the following topics:

21.1 Add a Student to the Drop-in List

Users may add and delete students from the drop-in list and to assign the student to the advisor who is handling the visit. The Drop-in Screen in the STUDENTS WAITING mode defaults to a list of all students, in the order of arrival, who have registered on that specific date and have not yet been seen.

1. On the SARS MENU, click on the DROP-IN button to display the STUDENT DROP-IN SCREEN.

2. If the DATE option is not disabled, click on DATE and type in the desired date, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

Tip
To back up one day, press **F2**. To move forward one day, press **F3**.

3. Click on ADD to display the DROP-IN APPOINTMENT screen.

4. Complete the following information on the DROP-IN APPOINTMENT SCREEN, using either the ENTER or the TAB key to move from field to field. The first two steps are required; the remaining steps are optional.

   a. Select one of the options below to enter the student's identifier.

      - Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

      - If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat as needed. Then type the student's identifier.

Note
The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

- If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

- If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7***. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

  * **F7** will only generate a temporary or guest ID if the Location using the Drop-in Screen is configured in SARS·UTIL with at least the minimum required settings for the Location. Those minimum settings are:

  - GRID Settings: Time Increment, Start Time, Stop Time, all three Booked Appointment Codes, and Default Master Schedule Code.

  - MISC Settings: Primary ID Format.

  See Section 4, Set Up the Application, in Part I of this Manual.

Notes
If a student previously scheduled an appointment or if information about a student is stored in a school maintained database to which SARS·GRID has access, Name, and possibly Birth Date, Home and/or Contact Phone (if this information is in the database) will appear automatically after typing the ID. However, the information must be stored in the database under the ID format that is being used.

If USE STUDENT CLASSES has been activated in SARS·UTIL, a Course Selection screen will be displayed after the student's ID is entered. The screen will list all the classes in which the student is enrolled. To add those classes to the Reason Codes list:
(i) Click on one or more classes to be included as Reason Codes.
(ii) Click on SELECT.
The selected courses will be placed at the top of the Reason Code list and will be available for selection as reasons for the drop-in visit.

b. Type the student's LAST NAME, FIRST name in NAME (for example, SMITH, JOHN). The last name first method will render reports sorted by student names more usable.

c. Type the student's birth date in BIRTH DATE. (Birth year will accept 2 or 4 digits. The century defaults to 20 for years 00 to 29. The century defaults to 19 for years 30 to 99. To override the default, you must enter the 4-digit date.)

d. Type the student's permanent telephone number in HOME PHONE and any extension in EXTENSION.

e. Type the student's contact telephone number in CONTACT PHONE and any extension in EXTENSION.

f. Type the student's text phone number in TEXT PHONE, if the student has a cell phone with text messaging capabilities.

g. Click on the icon adjacent to ADDRESS INFORMATION and then type the student's street address, city, state, zip code, and e-mail address(es).

h. In the STUDENT CONTACT METHODS panel, click on CALL, EMAIL and/or TEXT to specify the acceptable methods of contacting the student. Any combination or none may be selected.

i. The default Reason Code (e.g., DROPIN) will be highlighted, if the DEFAULT REASON CODE option has been established. To select additional Reason Codes (e.g., CAREER), click on the selected options in the REASON CODE field. (Use the scroll bar if the list extends beyond the viewable screen.)

Note
If you wish to generate statistical reports on the reasons why students request appointments, you must select one or more Reason Codes.

j. Enter specific information about the reason for making the appointment in the COMMENTS field. The field will accept up to 255 characters.

Note
Comments will be displayed on the Drop-in Screen. Use discretion when entering any comments.

k. If the USE SHORT NAME ASSIGNMENTS option has been selected, the name of the advisor to whom this student is assigned will be displayed in the Advisor field. Otherwise, click on ADVISOR ▼ and then on a specific name to enter the student's preference, or leave the option at NEXT to indicate that the student has not expressed a preference and should see the next available individual.

Note
If the selected advisor is different from the individual assigned to the student, a warning message will be displayed.

Click on YES to confirm that a different individual should be assigned for this appointment, or click on NO to select the assigned advisor.

l. For additional options, click on MORE>>. This is a toggle button. (After it is clicked, the button is renamed <<LESS.)

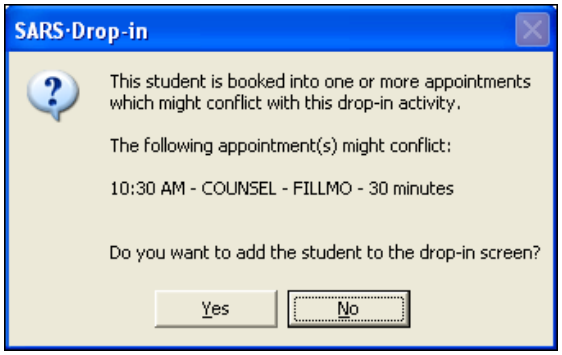
m. If the ADDITIONAL INFO button is enabled, the user may view information about the student, and if permitted, also enter or change information about a student. Click on ADDITIONAL INFO to display the ADDITIONAL INFORMATION screen. Review or record the student's response to each question. Each question allows for a date, list, text or yes/no response. Click on SAVE to save new or changed information; click on CLOSE to exit without saving. (Also see "Additional Information" in this Part, Section 23.).

n. Any existing alerts about that student will pop up on your screen after the student's ID is entered. Any Early Alerts created in the SARS·ALRT application will pop up first, followed by any SARS·GRID alerts. If an Early Alert is displayed, click on TRANSFER REASONS to include those reasons in the student's appointment. (Also see Alerts in this Part, Section 22.)

o. To link the topic of the current visit to a different term, as opposed to the current term (e.g., discussion of an Ed Plan for the next semester), click TERM ▼ and select the desired Term.

p. Review the INFO FLAGS panel to see whether the student has completed key actions toward matriculation goals.

5. Click on COMMIT DROP-IN. If the drop-in visit for this student might conflict with a pending appointment, a warning screen may be displayed. Here is an example:



Note
Only users who have GRID - ACCESS or VIEW STUDENT HISTORY permissions will be able to see the actual Location and Short Name for the conflicting appointment. In order to preserve student confidentiality, other users will see an asterisk (*) with the following message: "Details about the Location and Short Name are not available based on your permission level."

6. To confirm the action, click on YES. Otherwise, click on NO and advise the student of the conflicting appointment.

7. Click on COMMIT DROP-IN. The student's name will be added to the STUDENTS WAITING Screen.

21.2 Assign a Student to an Advisor

Schedulers may add and delete students from the drop-in list**,** as well as assign the student to the advisor that is handling the appointment. The Drop-in Screen in the STUDENTS WAITING mode defaults to a list of students who have not yet been seen, in the order of arrival.

Advisors may assign a student to themselves if they have been given the necessary access rights.

1. If the toggle button reads WAITING, click on that button to change the display to the STUDENTS WAITING screen.

2. Double-click on the line on the Drop-in Screen containing the student's name. This action will display the DROP-IN APPOINTMENT SCREEN.

3. Click on ADVISOR ▼ and then select the advisor who is handling the drop-in visit. Note that this field label is dynamic and will display whatever label has been assigned for the system administrator for this Location (e.g., Advisor, Counselor, Tutor, etc.).

4. Click on OK. A confirmation message will be displayed.

5. Click on YES. You will be returned to the Drop-in Screen. The student's name will be removed from the STUDENTS WAITING list, but will be retained on the ALL STUDENTS list. A record of the activity will be added to the student history file, which can be viewed from the STUDENT HISTORY.

Notes
After an advisor has selected a student from the Drop-In list, the Advisor field for that student drop-in appointment will become disabled. Subsequently, only users who do not have a Short Name may change drop-in assignments from one individual to another.

If the steps listed above are performed for a date that is in the past, the system will prompt the user to enter the time that the student was assigned to the advisor.

If a student's name was selected in error, go to the ALL STUDENTS screen, double-click on the student's name to display the DROP-IN APPOINTMENT SCREEN, and click on RESTORE. After confirming the action, the name will be restored to the STUDENTS WAITING list showing the original time that the student was added to the list.

21.3 Change Information about a Student on the Drop-in List

You may change any of the information on the DROP-IN APPOINTMENT SCREEN except for the student's ID.

1. Double-click on the student's name from the ALL STUDENTS list. The DROP-IN APPOINTMENT SCREEN will be displayed for that student.

2. Change the information as desired.

3. Click on CLOSE. A confirmation message will be displayed.

4. Click on YES. You will be returned to the Drop-in Screen.

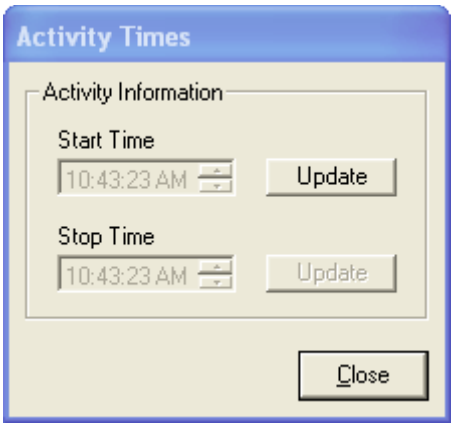
21.3.1 Set the Actual Start and Stop Times for a Drop-in Visit

The actual start time and stop time of a drop-in visit may be set after a student registers for a drop-in visit. To do this, open the DROP-IN APPOINTMENT screen.

1. Click on the applicable drop-in entry on the list.

2. If the screen is not expanded, click on MORE >>.

3. Click on SET ACTIVITY TIMES. Here is an example of the screen:



The options are:

- START TIME: Used to display the time that the drop-in visit started, which will be set when the advisor clicks on the adjacent Update button. (The Start Time may be adjusted only by the system administrator.)
- UPDATE: Use to set the Start Time when the appointment begins.
- STOP TIME: Used to display the time that the drop-in visit ended, which will be set when the advisor clicks on the adjacent Update button. (The Stop Time may be adjusted only by the system administrator.).
- UPDATE: Use to set the Stop Time.
- CLOSE: Use to exit the screen.

4. When the student arrives in the advisor's office, click on the UPDATE button adjacent to the START TIME field. This will set the Start Time and the Activity Times screen will be closed automatically.

5. At the end of the visit, click on SET ACTIVITY TIMES again and then click on the UPDATE button adjacent to the STOP TIME field. This will set the Stop Time and the Activity Times screen will be closed automatically.

Note
Only a system administrator can adjust the Start and Stop Times by selecting or typing in a different start time, and then clicking on the adjacent UPDATE buttons.

21.4 Print the Drop-in List

Two versions of the DROP-IN REPORT are available: ALL STUDENTS and STUDENTS WAITING. The drop-in list that is currently displayed will be printed. The report displays the following information: Student Name, Student ID, Advisor, Arrival Date and Time, Time Serviced, Time Waiting (elapsed time between check-in time and the time that each student was seen), Comments, total counts for the total number of Drop-ins Seen and the number of Drop-ins Not Seen, the Average Wait Time for those students who were seen, and the total number of students who were deleted from the list.

Data from the Drop-In List may be exported to a batch file. The list may then be used in SARS·CALL to send messages via automated calling or in SARS·MSGS to send messages via automated texts or emails. Be sure that the ALL STUDENTS mode (SHOW ALL) is displayed before clicking on EXPORT.

1. Click on either SHOW ALL or WAITING to display the desired screen.

2. Click on PRINT to display the setup screen. Here is an example:

3. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

4. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

5. Click on SUPPRESS ID, as desired, to hide student IDs from the report printout.

6. To view the report on the screen, click on PREVIEW REPORT; then click on PRINT.

7. To print the report, click on PRINT. Here is an example of the ALL STUDENTS version of the report.

Drop-in Report – All Students

From 5/26/11 to 5/26/11

Student Name	Student ID	Name	Date	Arrived	Serviced	Waiting	Comments
SMITH, JOHN	*******	John Adams	5/26/11	2:30 PM	2:41 PM	11 Mins	
RED, RUBY	*******	John Adams	5/26/11	2:33 PM	3:01 PM	28 Mins	
YELLOW, YVETTE	*******	Abe Lincoln	5/26/11	2:34 PM	2:35 PM	1 Min	
ORANGE, ODIE	*******	Abe Lincoln	5/26/11	2:45 PM			
BLUE, BARNEY	*******	J Buchanan	5/26/11	2:51 PM			-Deleted
GREENE, SUSAN	*******	J Buchanan	5/26/11	2:57 PM			

Drop-ins Seen: 3 Drop-ins Not Seen: 3 Average Wait Time: 13 Mins Deleted: 1

Printed 5/26/11 3:33:45 PM Location: ADVISING

8. To export the report to another format,

   a. Make sure that the screen is displayed in the ALL STUDENTS (SHOW ALL) mode.

   b. Click on EXPORT. A SAVE REPORT screen will be displayed.

   c. Click on SAVE IN ▼ and then select the location in which the report will be stored.

   d. In the FILE NAME field, type in a file name for the report.

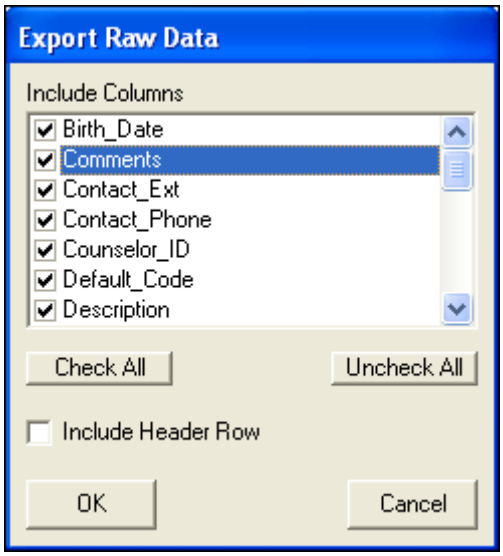
   e. Click on SAVE AS TYPE ▼ and then select the file format in which the report will be saved. The options are:

      PDF Files (*.PDF)
      Excel Files (*.XLS)
      Text Files (*.TXT)
      HTML Files (*.HTM)
      Rich Text Files (*.RTF)
      Tiff Files (*.TIF)
      Raw Data (*.CSV)
      SARS·CALL Batch Files (*.SC)

   f. Click on SAVE.

9. If Raw Data (*.CSV) is selected, an Export Raw Data screen will be displayed showing a list of columns that are contained in that particular report.

   Here is an example:



   The options are:

   - INCLUDE COLUMNS: Use to select the data elements to be exported. All data elements available in any given report will be available for selection. The data elements displayed on the list will vary, depending on the report that is being exported.

- CHECK ALL: Use to select all data elements for the selected report.
- UNCHECK ALL: Use to de-select all data elements that are available for the selected report.
- INCLUDE HEADER ROW: Use to include the title of each column exported.
- OK: Use to approve the selections.
- CANCEL: Use to undo the selections.

a. The default is that all data columns will be checked for export. To de-select a column, click on the checkbox for the data element that should not be exported.

b. Click on the Include Header Row checkbox if you want the column titles to be exported, as well.

c. Click on OK.

The report will be available for use in the selected format.

10. Click on CLOSE.

21.5 Delete a Student from the Drop-in List

If a student is deleted from the STUDENTS WAITING list, the name will remain on the ALL STUDENTS list. Deleting a student from the ALL STUDENTS list, however, is an irrevocable action. If you wish to generate a DROP-IN REPORT showing all students who made drop-in visits, regardless of whether they were seen by an advisor, do not delete names from the ALL STUDENTS list. If a student is deleted from either list, the original entry will not be stored in the student's history.

1. On the STUDENTS WAITING Screen, click on the line containing the student's name for whom the drop-in visit is being cancelled.

2. Click on DELETE. A confirmation screen will be displayed

3. Click on YES.

Note
To restore a student's name that was deleted from the STUDENTS WAITING list, go to the ALL STUDENTS screen, double-click on the student's name to display the DROP-IN APPOINTMENT SCREEN, and click on RESTORE. After confirming the action, the name will be restored to the STUDENTS WAITING list with the original arrival time.

SECTION 22 ALERTS

22.0 Overview

This section discusses the following options in dealing with alerts:

22.1 View or Record an Alert from a Booked Appointment Slot

22.2 View or Record an Alert from an Un-booked Cell

22.3 Delete an Alert from a Booked Appointment Slot

22.4 Delete an Alert from an Un-booked Cell

You may wish to use the SARS·GRID Alert feature in the following situations: reminding a student to bring needed documents to the appointment or identifying the student as a repeated "no show." The Alert screen can accommodate up to 2,000 characters. The alert is tied to the student's ID, not to a scheduled appointment.

Note
These methods may be used only if a student's ID already exists in the database being used. The ID is in the database once the first appointment is scheduled or if student data from an external source has been loaded in the database being used.

Users may view SARS·GRID Alerts for all Locations to which they have been assigned. Any existing alerts about that student will pop up on your screen whenever you double-click on the student's booked appointment on THE GRID, or when you use the Command Menu to go to Alerts while focused on a booked appointment. Existing alerts about a student will also pop up on your screen when you use the Command Menu to go to Alerts and enter the student's ID, or when you enter the student's ID on the STUDENT APPOINTMENT screen.

Alert screens may appear in varying sequences and formats, depending on whether more than one SARS·GRID Alert exists for a student and whether the school is also using SARS·ALRT (Early Alerts).

In addition to Early Alerts, there are four SARS·GRID Alert types available. They are:

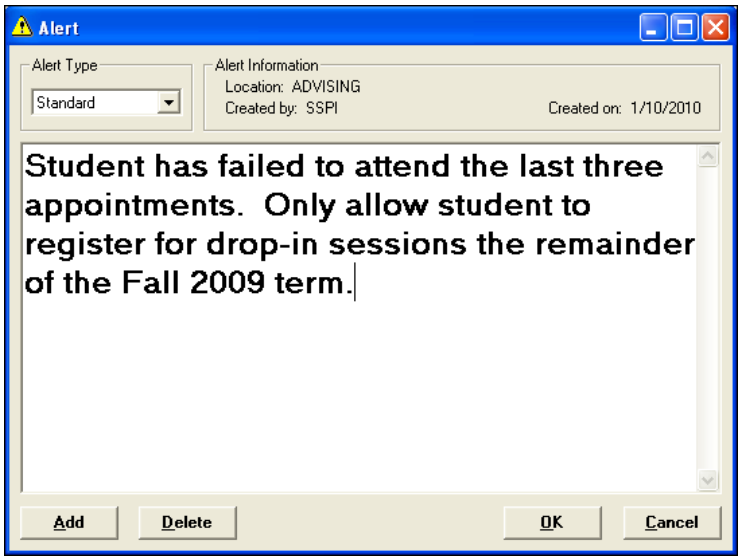
- GLOBAL ALERT: Use to create an Alert that will be automatically displayed in all Locations. This type of alert, of which there may only be one per student, can only be created (and deleted) by any system administrator with User Name Maintenance access rights. The manager's User Name and the date it was written will be embedded in the Global Alert. Only a user with the same access rights may delete it.

- PRIMARY ALERT: Use to create an Alert that will be designated to be the first alert displayed, after the Global Alert, when more than one alert exists for a student. Only one Primary Alert per Location can exist for a student, and this type of alert can only be deleted by the user who created it or a system administrator with UTIL·- USER NAME MAINTENANCE access rights.

- STANDARD ALERT: Use to create a regular Alert. A standard alert will be displayed after any Global and Primary Alert.
- STUDENT ALERT: Use to create an Alert to be viewed by the student when logging into the web interface (*e*·SARS) or when using SARS·TRAK.

If only one alert exists for that student, it will be displayed in full. Multiple alerts will be displayed on a list. If an Alert on a list cannot be read in its entirety, double-click on the line containing that Alert to display it in full.

Here is an example of the ALERT screen if a student has only one SARS·GRID Alert:



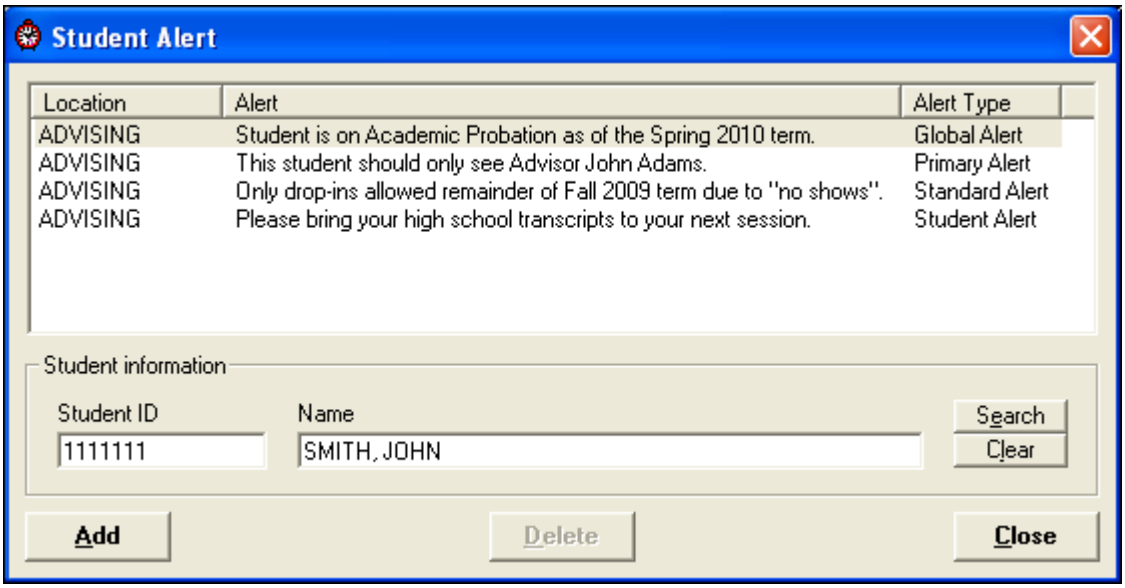
The Alert Type, Location, Author and Creation Date will be displayed in a panel at the top of the Alert.

The options are:

- ALERT TYPE: Use to select the type of alert (e.g., Primary, Global, Standard, or Student.)
- ADD: Use to add more information to this SARS·GRID Alert.
- DELETE: Use to delete this alert.
- OK: Use to save information that has been added to the alert.
- CANCEL: Use to close the screen without saving any new information.

Tip
This Alert screen may be re-sized to display a longer message without scrolling.

Here is an example of the STUDENT ALERT screen if a student has more than one SARS·GRID Alert, but no Early Alert:



The Location, Alert, and Alert Type will be displayed.

The options are:

- STUDENT INFORMATION: Use to display or enter identifying information about a student.

  STUDENT ID: Use to display or enter the student's ID.

  NAME: Use to display or enter the student's name.

  SEARCH: Use to find a student whose ID is not known.

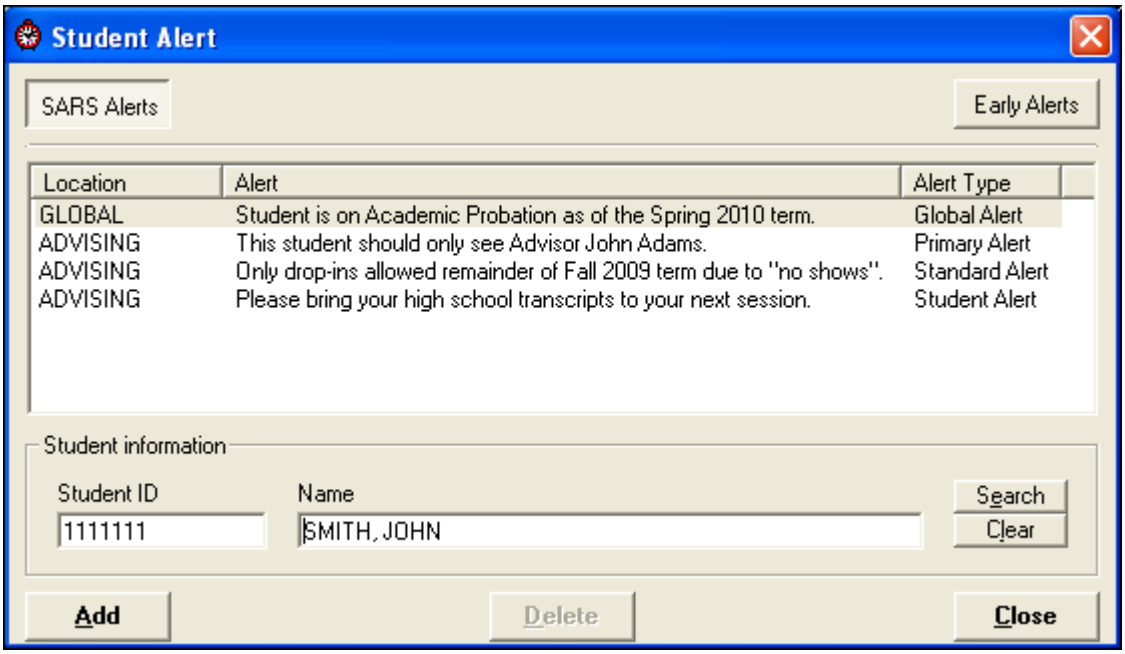
  CLEAR: Use to clear the screen for another entry.

- ADD: Use to make the fields available for an entry. (Not applicable for Early Alerts.)

- DELETE: Use to remove data. (Not applicable for Early Alerts.)

- CLOSE: Use to exit the screen.

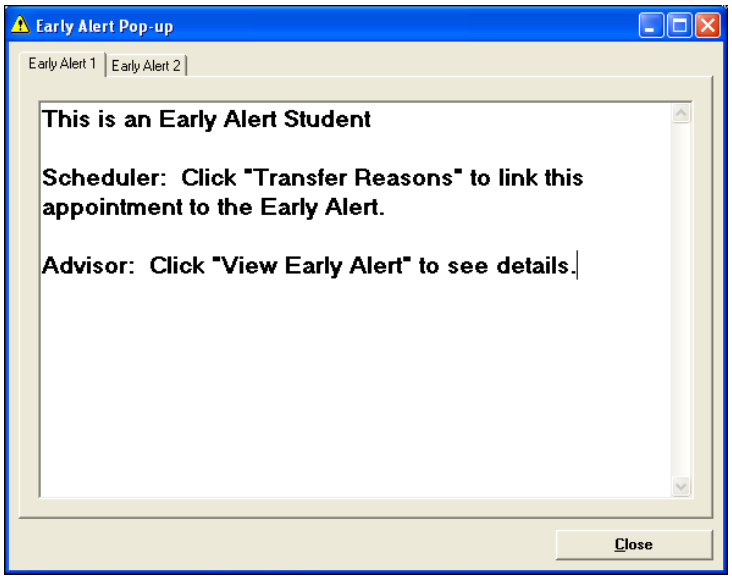
Here is an example of the STUDENT ALERT screen when the student has more than one SARS·GRID Alert, as well as one or more Early Alerts:



The additional options are:

- SARS ALERTS: Use to display a list of SARS·GRID Alerts. This is the default mode.
- EARLY ALERTS: Use to display the EARLY ALERT POP-UP screen, from which any Early Alerts may be viewed.

Here is an example of the EARLY ALERT POP-UP screen when any Early Alerts about the student exist:



The creation date and name of the author will be embedded in the body of the Alert.

The options are:

- TRANSFER REASONS: Use to include the reasons created in the Early Alert in the student's appointment. (This is used only when booking an appointment.)
- CLOSE: Use to exit the screen.

22.1 View or Record an Alert from a Booked Appointment Slot

1. When focused on the booked appointment cell, either

   a. Double-click on the cell to display the STUDENT APPOINTMENT screen,

   -or-

   b. Right-click to display the COMMAND MENU, then left-click on ALERT.

2. If any SARS·GRID Alerts exist, they will pop up automatically.

   a. Review the message(s). Then click on OK or CANCEL to exit the screen.

   -or-

   b. To edit or append text to an existing standard or student SARS·GRID Alert, type the changes directly onto the existing alert and click on OK to exit the screen. (Primary and Global alerts cannot be edited or appended. They must first be deleted and then re-created.)

   -or-

   c. To enter another SARS·GRID Alert, click on ADD. Click on ALERT TYPE ▼ and then select the type of alert (global, primary, standard, or student). In the body, type a message. Click on OK to exit the screen.

   Note
   If any Early Alerts about the student exist, an EARLY ALERT POP-UP screen will be displayed after exiting any SARS·GRID Alert. Tabs will indicate one or more Early Alert (e.g., Early Alert 1, Early Alert 2, etc.). The most recently created Early Alert is always found using Early Alert 1 tab.

   i) Review the alert under Early Alert 1 tab, to which the system defaults.

   ii) To view any other Early Alerts, click on Early Alert tab 2, etc.

   iii) When done, click on CLOSE.

   Early Alerts cannot be added, edited or deleted in SARS·GRID.

3. If no SARS·GRID Alerts exist, right-click to display the COMMAND MENU, then left-click on ALERT.

-or-

4. Double-click on the cell to display the STUDENT APPOINTMENT screen and click on ALERT.

   a. Click on ADD.

   b. Click on ALERT TYPE ▼ and then select the type of alert (global, primary, standard, or student).

   c. In the body, type a message.

   d. Click on OK to exit the screen.

22.2 View or Record an Alert from an Un-booked Cell

1. When booking a new appointment, double-click on the available appointment cell to display the STUDENT APPOINTMENT screen. Any existing alerts will pop-up on the screen. Click on ALERT.

   -or-

2. When not booking an appointment, right click to display the COMMAND MENU and then left click on ALERT and enter the student's ID. Any existing alerts will pop-up on the screen.

3. Select one of the options below to enter the student's identifier.

   - Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   - If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   - If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

   - If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

     Note
     The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

4. In the absence of any Global or Primary Alerts, if any Early Alerts about the student exist, an EARLY ALERT POP-UP screen will be displayed. Tabs will indicate one or more Early Alert (e.g., Early Alert 1, Early Alert 2, etc.). The most recently created Early Alert is always found using Early Alert 1 tab.

   a. Review the alert under Early Alert 1 tab, to which the system defaults.

b. To view any other Early Alerts, click on the Early Alert 2 tab, etc.

c. While viewing the Early Alert tab for which an appointment is being made, click on TRANSFER REASONS to transfer the reasons created in the Early Alert to the student's appointment. Those reasons will be added to the STUDENT APPOINTMENT screen for the selected appointment, and the EARLY ALERT POP-UP screen will close.

Note
Early Alerts cannot be added, edited or deleted in SARS·GRID.

5. If any SARS·GRID Alerts exist, they will pop up automatically next.

   a. Review the message, then click on OK or CANCEL to exit the screen.

   b. To enter a new SARS·GRID alert, click on ADD. Click on ALERT TYPE ▼ and then select the type of alert (global, primary, standard, or student). In the body, type a message. Click on OK to exit the screen.

   c. To edit or append text to an existing SARS·GRID alert, type the changes directly onto the ALERT screen and click on OK to exit the screen. (This is not applicable to Early Alerts, which cannot be edited in SARS·GRID.)

   Reminder
   Primary and Global alerts cannot be edited or appended. They must first be deleted and then recreated.

22.3 Delete an Alert from a Booked Appointment Slot

Note
Only alerts created in SARS·GRID may be deleted. Early Alerts **cannot** be deleted in SARS·GRID.

If an action required by an alert has been taken or if the alert is no longer applicable, the alert should be deleted. Only the user who created A Global or Primary alert may delete that type of alert. Any user who is able to read a Student or Standard Alert may delete that type of alert.

1. When focused on the booked appointment cell, either

   a. Double-click on the cell. If any alerts exist, they will be displayed

   -or-

   b. Right-click to display the COMMAND MENU, then left-click on ALERT. Any existing alerts will be displayed.

2. If the alert is on a list, click on the alert to be deleted.

3. Click on DELETE. A confirmation message will be displayed.

4. Click on YES.

22.4 Delete an Alert from an Un-booked Cell

Note
Only alerts created in SARS·GRID may be deleted. Early Alerts **cannot** be deleted in SARS·GRID.

If an action required by an alert has been taken or if the alert is no longer applicable, the alert should be deleted. Only the user who created A Global or Primary alert may delete that type of alert. Any user who is able to read a Student or Standard Alert may delete that type of alert.

1. When focused on any cell on THE GRID that does not display a booked appointment, right-click to display the COMMAND MENU, then left-click on ALERT.

2. Select one of the options below to enter the student's identifier.

   - Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   - If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   - If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

   - If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

     Note
     The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

3. If the alert is on a list, click on the alert to be deleted.

4. Click on DELETE. A confirmation message will be displayed.

5. Click on YES.

SECTION 23 — ADDITIONAL INFORMATION

23.0 Overview

The options for working with Additional Information are discussed in the following sections:

23.1 From a Booked Appointment Slot

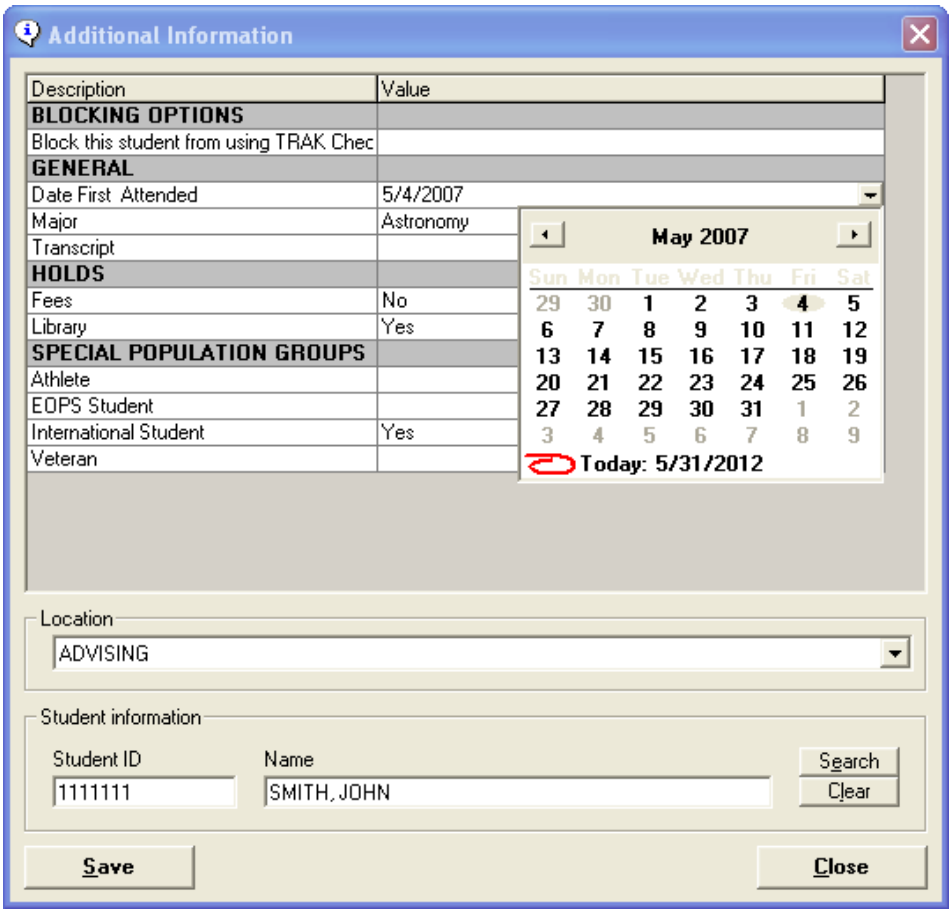
23.2 From an Un-booked Cell on THE GRID

23.3 From a Group Appointment Slot

Use of this feature is restricted only to those Locations to which the individual users have been granted access.

Before the Additional Information feature is available, a list of questions that will provide more detailed information about the student must be established in LOCATION MAINTENANCE. The list of questions will apply to all students in the selected Location. Additional Information is tied to a student's identifier, not to a scheduled appointment.

Here is an example of the screen layout.



The Additional Information screen will appear showing the following options:

- DESCRIPTION: Use to view the Additional Information question.
- VALUE: Use to view or enter a response to an Additional Information question. The value will contain a Date, List, Text or Yes/No response.
- LOCATION: Use to specify the name of the Location in which the additional information is stored.
- STUDENT INFORMATION: Use to display or enter identifying information about a student.

  ID: Use to display the student's identifier (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

  NAME: Use to display the student's last name, first name.

  SEARCH: Use to find a student whose ID is not known.

  CLEAR: Use to clear the screen for another entry in ID or NAME.
- SAVE: Use to save new entries or changes made on the screen.
- CLOSE: Use to exit without saving.

23.1 From a Booked Appointment Slot

1. From THE GRID, double-click on the appointment cell to display the STUDENT APPOINTMENT screen; then click on MORE>>.

   -or-

   Right click to display the COMMAND MENU.

2. Left-click on ADDITIONAL INFO. Any existing additional information about that student will be displayed.

3. Review the student's response to each question. Each question allows for a date, list, text, or yes/no response. The following are examples:

Date First Attended?	9/6/2006
Major?	Art
Veteran?	Yes

4. If the user has been given permission to enter a response to one or more questions follow the steps below:

   a. For a DATE response, click on the line in the VALUE column adjacent to the question and type in the desired date, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

   b. For a LIST response (e.g., Major), click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu. To select more than one

option from the list, after clicking on the line, hold down the Control key and then click on each item to be included.

c. For a TEXT response, click on the line in the VALUE column adjacent to the question. Type in a response.

d. For a YES/NO response, click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu.

5. Click on SAVE to save new or changed information and return to THE GRID.

23.2 From an Un-booked Cell on THE GRID

1. From anywhere on THE GRID, right-click to display the COMMAND MENU.

2. Left-click on ADDITIONAL INFO to display the ADDITIONAL INFORMATION screen.

3. Select one of the options below to enter the student's identifier.

   a. Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   b. If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   c. If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

   d. If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

   Note
   The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

4. If the student's identifier is not known, type the student's name or a portion thereof in NAME and click on SEARCH. If only one match is found, any existing Additional Information about that student will be displayed. If more than one match is found, a list of all students with that name will appear.

   a. Click on the selected name.

   b. Click on OK. A list of any existing Additional Information about that student will be displayed.

5. Review the student's response to each question. Each question allows for a date, list, text, or yes/no response. The following are examples:

Date First Attended?	9/6/2006
Major?	Art
Veteran?	Yes

6. If the user has been given permission to record a response to one or more questions follow the steps below:

   a. For a DATE response, click on the line in the VALUE column adjacent to the question. Type in the desired date, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

   b. For a LIST response (e.g., Major), click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu. To select more than one option from the list, after clicking on the line, hold down the Control key and then click on each item to be included.

   c. For a TEXT response, click on the line in the VALUE column adjacent to the question. Type in a response.

   d. For a YES/NO response, click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu.

7. Click on SAVE to save new or changed information.

23.3 From a Group Appointment Slot

1. From THE GRID, double-click on the group appointment cell to display the STUDENT APPOINTMENT screen. (If the appointment is full, the ROSTER will appear immediately. Skip to step 4.)

2. Click on MORE>>.

3. Click on ROSTER.

4. Click on the student for whom additional information is being recorded.

5. Click on ADDITIONAL INFO to display the ADDITIONAL INFORMATION screen. Any existing additional information about that student will be displayed.

6. Review the student's response to each question. Each question allows for a date, list, text, or yes/no response. The following are examples:

Date First Attended?	9/6/2006
Major?	Art
Veteran?	Yes

7. If the user has been given permission to record a response to one or more questions follow the steps below:

   a. For a DATE response, click on the line in the VALUE column adjacent to the question. Type in the desired date or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

   b. For a LIST response (e.g., Major), click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu. To select more than one

option from the list, after clicking on the line, hold down the Control key and then click on each item to be included.

c. For a TEXT response, click on the line in the VALUE column adjacent to the question. Type in a response.

d. For a YES/NO response, click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu.

8. Click on SAVE to save new or changed information and return to the ROSTER.

9. Click on CLOSE to return to the STUDENT APPOINTMENT screen.

10. Click on CLOSE to return to THE GRID.

SECTION 24 — ADDRESS INFORMATION

24.0 Overview

The ADDRESS INFORMATION feature enables users to view, add or edit a student's mailing address and/or e-mail address.

The following sections discuss the steps for using this feature:

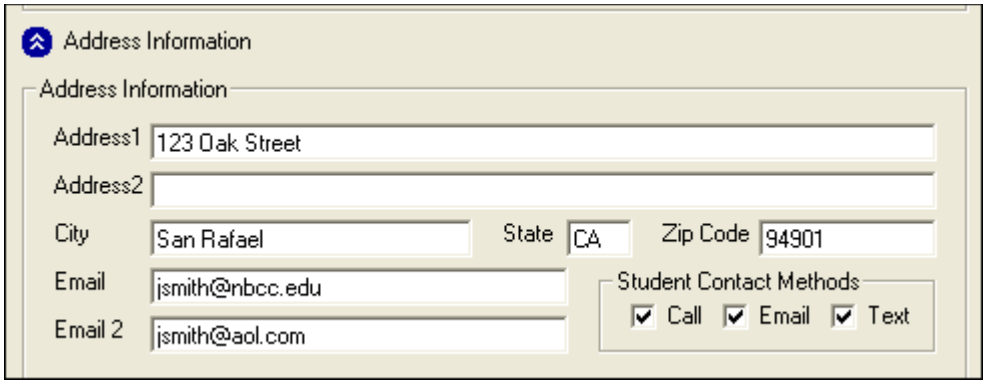
24.1 From a Booked Appointment Slot

24.2 From an Un-booked Cell on THE GRID

24.1 From a Booked Appointment Slot

1. From THE GRID, double-click on the appointment cell to display the STUDENT APPOINTMENT screen.

   a. Click on the icon adjacent to ADDRESS INFORMATION to expand the screen to display address fields. Here is an example:



   b. View or enter the student's street address, city, state, zip code, and e-mail address(es).

   Note
   The State field allows up to 20 characters to accommodate international addresses.

   c. Review the information in the STUDENT CONTACT METHODS panel to ensure that CALL, EMAIL and/or TEXT are checked, based on the method(s) by which the student wishes to be contacted.

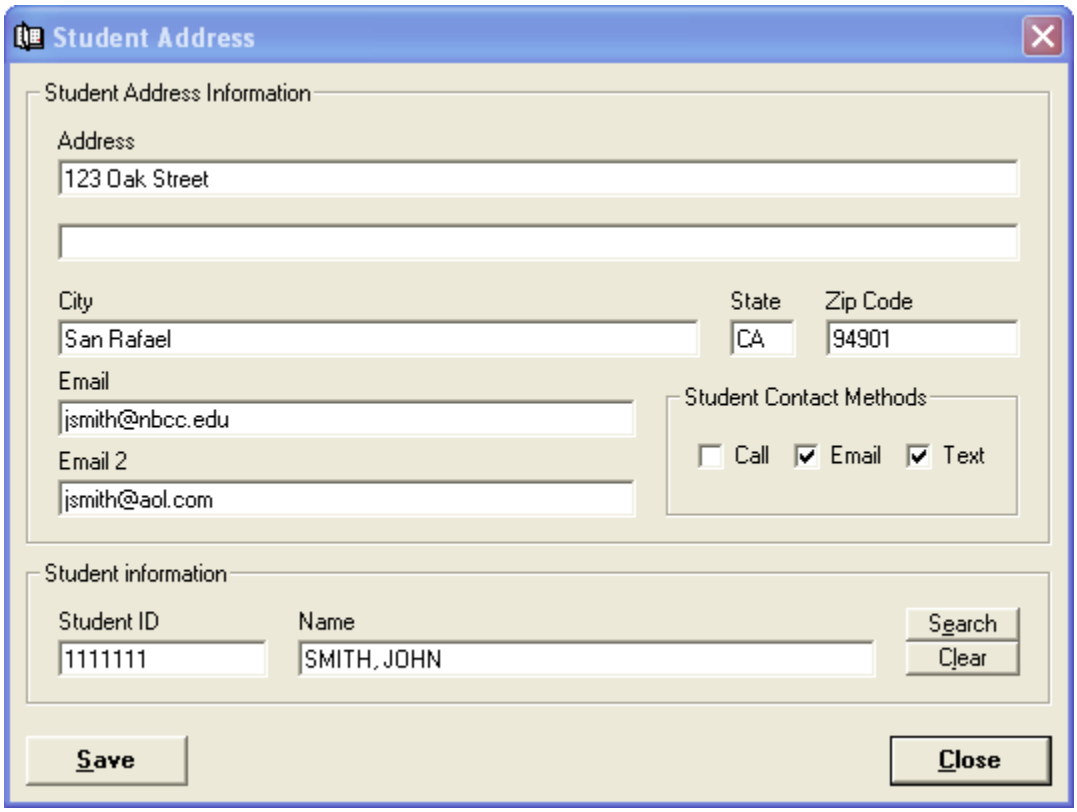
   d. Click on CLOSE. If changes have been made in any of the fields, a confirmation message will be displayed.

   e. Click on YES.

-or-

2. From anywhere on THE GRID, right click to display the COMMAND MENU.

a. Left-click on ADDRESS INFO. A STUDENT ADDRESS screen will be displayed. Here is an example:



b. View the information; then click on CLOSE.

-or-

c. Enter the desired information, then click on SAVE.

24.2 From an Un-booked Cell on THE GRID

1. Right-click to display the COMMAND MENU.

2. Left-click on ADDRESS INFO to display the STUDENT ADDRESS screen.

3. Select one of the options below to enter the student's identifier.

   a. Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   b. If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   c. If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

d. If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

Note
The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

4. If the student's identifier is not known, type the student's name or a portion thereof in NAME and click on SEARCH. If only one match is found, any existing address information about that student will be displayed. If more than one match is found, a list of all students with that name will appear.

   a. Click on the selected name.

   b. Click on OK. Any existing address information about that student will be displayed.

5. View the information; then click on CLOSE.

   -or-

6. Enter the desired information, then click on SAVE.

SECTION 25 -- ADDITIONAL DAILY STUDENT CONTACTS

25.0 Overview

In addition to scheduled appointments and drop-in visits, advisors may have additional contacts with students throughout each day. These are not scheduled contacts in that the student's ID and name are not recorded in the system. These contacts may involve a telephone call or a brief encounter in or out of the office.

Two methods are available for recording additional contacts. They are discussed in the following sections:

25.1 Tally Student Contacts

25.2 Record Student-Specific Additional Contacts

25.1 Tally Student Contacts

The Additional Contacts screen allows a tally of those contacts to be captured.

1. Select the date for which additional contacts are to be recorded.

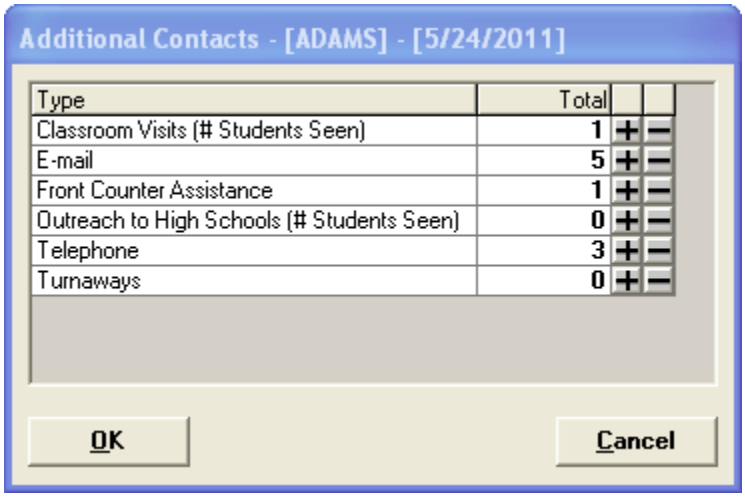
2. If an option exists to record student contacts that the scheduler has, place the focus on your own column (e.g., FRONTDSK) to record your own student contacts.

   -or-

   To record a contact for an advisor, left-click on the specific advisor's column on THE GRID for whom you are recording the number of additional contacts.

3. Right-click to display the COMMAND MENU.

4. Left-click on CONTACTS to display the screen for recording additional contacts. Here is an example:



5. The Plus and Minus signs serve as counters. Click on + to add a contact on the line containing the type of contact, or click on – to remove a contact. The number in the TOTAL field will change accordingly.

6. Click on OK to save your updated information and return to THE GRID.

Any student contacts added in this manner will be listed on the "Appointment Attendance Summary Report" and the "Short Name History Report". (See Part VI, Sections 37.1.1 and 37.9.1)

25.2 Record Student-Specific Additional Contacts

This discussion is intended for schools that have chosen to establish a special Schedule Code to be used for recording student contacts on the Roster. This method creates a record of student-specific contacts rather than a simply tally.

First, a schedule code must have been created and included in the users' Master Schedules. An example would be EXTRA. Typically, the EXTRA Schedule Code would be placed in the last row of the Master Schedule so that it does not interfere with other daily activities.

In order for a user to record this type of Additional Contact, follow the steps below.

1. From THE GRID, double-click on the special Schedule Code (e.g., EXTRA) on the day in which the contact occurred. The Student Appointment screen will be displayed.

2. Proceed to add the student to the appointment screen, as if you were booking the student into a group appointment. (See "Schedule an Appointment" in this Part, Section 19.1)

Any student contacts added in this manner will be listed on the ROSTER. (See "View and Print the Roster" in Part III, Section 13.1)

PART V – USE THE APPLICATION (ADVISORS)

Part V is intended for use by advisors or other users for whom schedules are created and who have been assigned Short Names. This Part is comprised of the following sections:

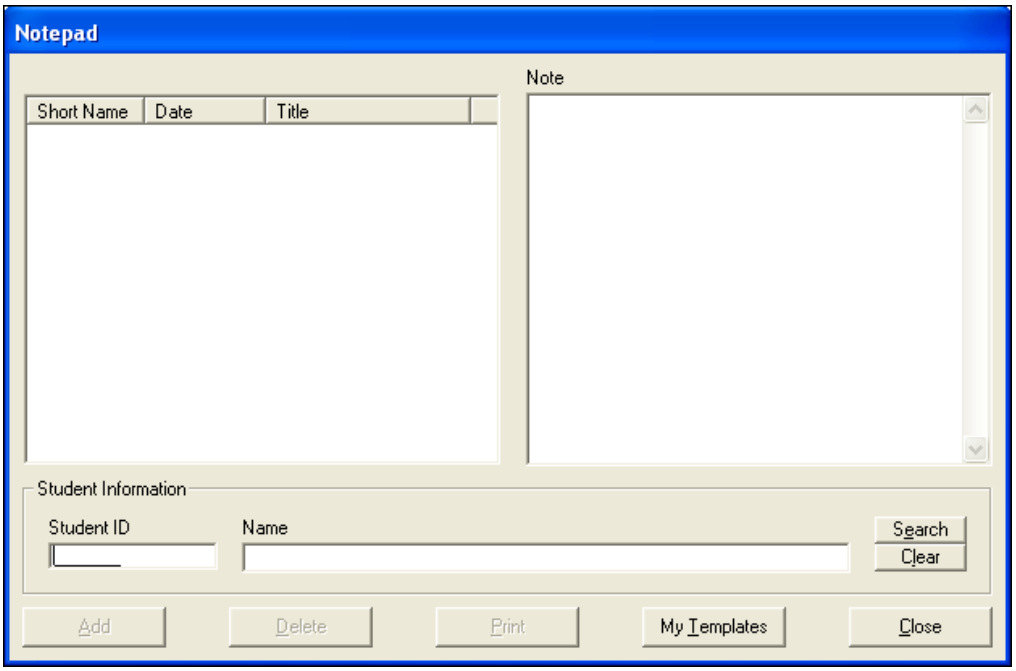
SECTION 26 — THE NOTEPAD

26.0 Overview

Users who have MY GRID – ACCESS NOTES access permissions may view and print, write, copy, and, in some cases, delete and change the visibility status of notes about students using the NOTEPAD. The Notepad will also display all eAdvising messages for the selected student, which can then be printed or deleted. Finally, if an Additional Information question is used for eAdvising, the Additional Info Response will be displayed on the Notepad.

The following sections discuss various ways in which the Notepad can be used:

Here is an example of a blank NOTEPAD.



The options are:

- SHORT NAME: Used to display the author of the note. (This information is recorded automatically when a note is saved.)
- DATE: Used to display the date that the note was written. (This information is recorded automatically when a note is saved.)
- TITLE: Used to summarize the content of the note.

- NOTE: Use to record information about a student. The date and user name of the author of the note will be embedded at the top of this space.
- STUDENT INFORMATION: Use to display or enter identifying information about a student.

  STUDENT ID: Use to display or enter the student identifier (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

  NAME: Use to display or enter the student's name.

  SEARCH: Use to find a student whose ID is not known.

  CLEAR: Use to clear the Notepad for another entry in ID or Name.
- ADD: Use to make fields available to enter new data.
- DELETE: Use to remove an entire note.
- PRINT: Use to initiate printing of the selected note.

MY TEMPLATES: Use to create, view or select one's own template (if allowed by the system administrator).

- CLOSE: Use to exit the screen.

The NOTEPAD can be opened in one of several ways:

1. When focused on a line on MY GRID that displays the student's name, left-click on the NOTEPAD icon, or click on the NOTEPAD button.
2. When focused on a line on MY GRID that does not display a student's name, left-click on the NOTEPAD button to display a blank Notepad.
3. Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).
4. If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.
5. If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 34.2.
6. If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

Note
The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after

entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

7. From the DROP-IN APPOINTMENT screen, click on NOTEPAD.

8. From the ROSTER, click on the NOTEPAD button.

26.1 View or Print a Note

Notes and eAdvising questions may be accessed from MY GRID. For more information about viewing and responding to eAdvising questions, see Section 26.7 in this Part.

If a Note has been written about the student, the Notes column for that line will contain the following icon: . To view the name of an icon on a line containing a student's appointment, rest the cursor on the icon. A tool tip will display the name.

The author of a Note may assign a visibility level to each note. The options are: Private, Public, and Local.

A PRIVATE note may be viewed and printed only by the author of the note. If a note has been marked as PRIVATE, and you are not the author, a padlock icon will be displayed as locked. If you click on such a note, a message will inform you that viewing access on that note is restricted.

Note
The Private option will only be available for selection if the system administrator has established that option for the Location. See Enable Private Notes Option in Section 4.5.2.

A PUBLIC note may be viewed and printed by all users who have ACCESS NOTES permission in any one Location, regardless of the location in which the Public note was written. Authors should use caution before designating a note as Public.

A LOCAL note may be viewed and printed by all users who have ACCESS NOTES permission in the same Location in which the note was written.

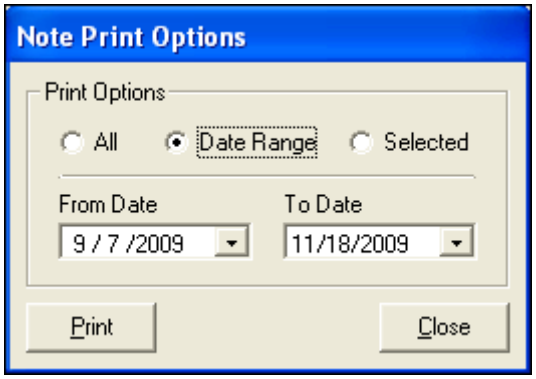
In rare circumstances, authors may wish to share a Local Note with one or more users who otherwise would not be able to view it. These would be users who have ACCESS NOTES permission in at least one Location, but not in the Location in which the Local Note was written. This special circumstance can be dealt with by asking the System Administrator to create a special Access Code and assign it to those users. This option is discussed in Section 4.8.4, Special Situations, in Part I of this Manual.

1. After gaining access to the NOTEPAD for the desired student, look to see whether the note has an open padlock ( ). If so, you will be able to view or print the note.

2. Click on the selected note. The full text of the note will be displayed in the NOTE box. Scroll as necessary to view the entire note.

3. To print one or more notes, highlight the note(s) to be printed and then click on PRINT.

The following screen will be displayed:



The options are:

PRINT OPTIONS:	Use to select which notes to be printed.
ALL:	Use to print all notes.
DATE RANGE:	Use to print all notes that were created within a selected date range. Use the FROM DATE and TO DATE fields to specify the date range.
SELECTED:	Use to print only the notes that have been highlighted.
PRINT:	Use to initiate the printing process.
CLOSE:	Use to exit the NOTE PRINT OPTIONS screen.

a. Click on ALL to print all notes for the student.

-or-

b. Click on DATE RANGE and then,

i) Click on the FROM DATE field and type in the first date to be included, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)

ii) Click on the TO DATE field and type in the last date to be included, or click on ▼ to use the Date Picker.

-or-

c. Click on SELECTED to print only the note that has been highlighted.

d. Click on PRINT. The Note(s) will be displayed in Preview mode.

e. Click on the print icon at the top of the preview report screen.

f. Click on PRINT on the Windows print screen.

4. To close the screen, click on the X at the upper right of the screen, or click on the icon to the left of the report title and then click on CLOSE. Then click on CLOSE on the report setup screen.

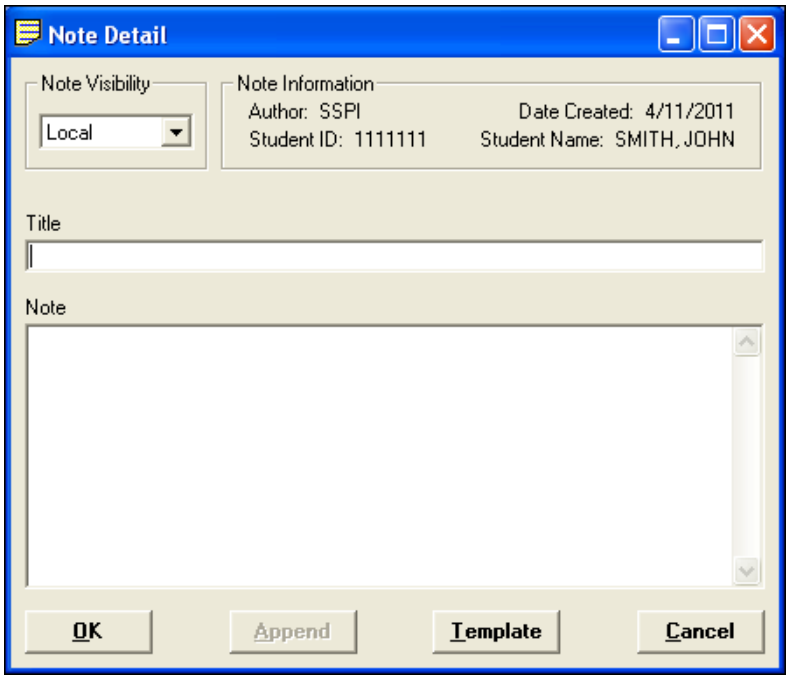
Tip
To clear the screen for another entry in ID or NAME, click on CLEAR. Then enter a new name and click on SEARCH or enter a new identifier.

5. Click on CLOSE to return to MY GRID.

Note
To gain access to the Notepad from the Roster, click on the NOTEPAD button or press **Alt+N**.

26.2 Add a Note

After gaining access to the NOTEPAD, click on ADD. A NOTE DETAIL screen will be displayed. Here is an example:



The options are:

- NOTE VISIBILITY: Use to specify whether the note may be viewed by all users who have ACCESS NOTES permission in the user's Location (Local), whether the note may be viewed by the author only (Private), or whether all users may view the note (Public). If Private is not displayed, the system administrator for the Location has not selected that option.

- NOTE INFORMATION: Used to display the author, the date the note was created, the student ID and the student name.

- TITLE: Use to enter a title or description of the note.
- NOTE: Use to type the actual note.
- OK: Use to save the note.
- APPEND: Use to add information to an existing note. Only the author of the note may append to it, unless the user is a manager with higher level access rights.
- TEMPLATE: Use to add information using a pre-existing template.
- CANCEL: Use to undo the note and exit the Note Detail screen without saving.

Note
If Templates are available for use when adding or appending a note, a TEMPLATES button will be displayed. See Section 26.5 and 26.6 in this Part.

1. Click on NOTE VISIBILITY ▼ and select the security level desired for the note. (You may change the option at any time.) The options are:

   - LOCAL: A LOCAL note may be viewed by any user having ACCESS NOTES permission in your own Location.
   - PRIVATE: A PRIVATE note is for the author's eyes only. If the Private option is not displayed, the system administrator has not enabled that option for this Location.
   - PUBLIC: A PUBLIC note may be viewed by all users across Locations, if they have ACCESS NOTES permission.

2. Click on the TITLE field and then type a description that summarizes the content of the note. The field will allow up to 50 characters.

Tips
Reason Code Descriptions may be transferred for the selected appointment to the body of the note by pressing **F4**. Before using this feature, be sure to update the Reason Codes on the Student Appointment screen.

The entire list of Additional Information Descriptions and Values – questions and answers – may be transferred to the body of the note by pressing **F6**.

3. Click in the space provided under NOTE and type the note. The field will allow up to 65,000 characters (approximately five pages per note) and an unlimited number of notes per student.

4. Click on OK.

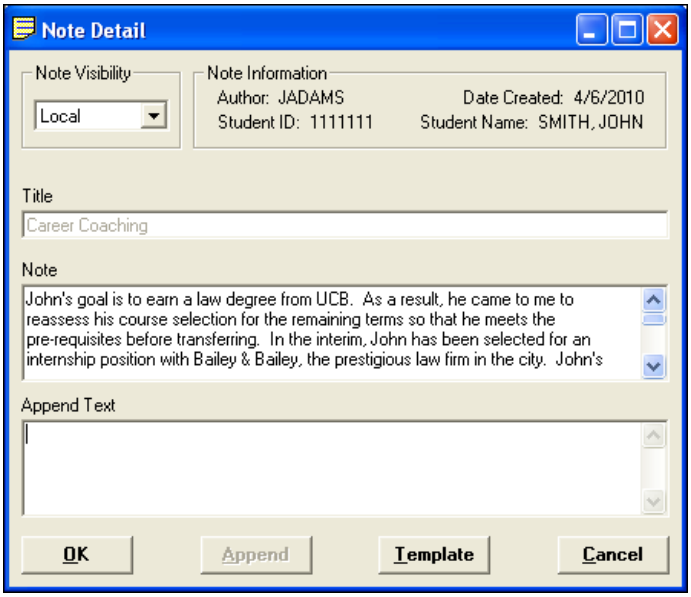
Warning
Changes cannot be made to the note after saving. However, an addendum may be written to the note.

5. To append a note to an existing note, double click on the note from the NOTEPAD.

Note
Only the author of the note may append to it. The exception is that a manager with higher level access rights may append anyone else's note if that user has a Short Name of ALL.

a. Click on APPEND. A confirmation message will be displayed.

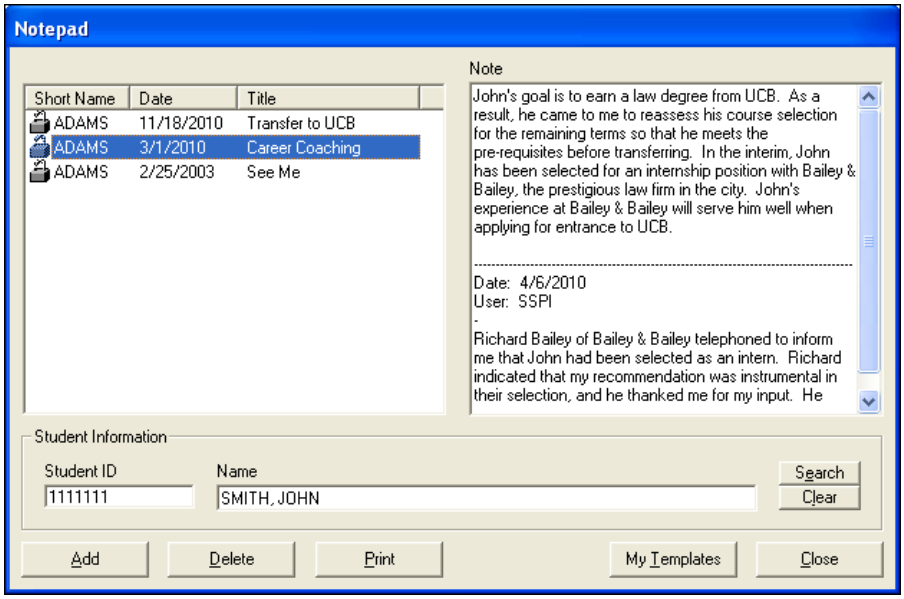
b. Click on YES. The NOTE DETAIL screen will be elongated and will provide an APPEND TEXT field. Here is an example:



c. Click on the space under APPEND TEXT and type in the desired note.

Note
If Templates are available for use when appending a note, a TEMPLATES button will be displayed. See Section 26.5 and 26.6 in this Part.

d. Click on OK. The note will be appended to the original note. Here is an example of the Notepad showing an appended Note:



6. To clear the Notepad for another entry in ID or NAME, click on CLEAR. Then enter a new name and click on SEARCH or enter a new identifier. Then repeat steps 2 - 6 in this section, as desired.

7. When done, click on CLOSE.

26.3 Delete a Note

Generally, only the author of a note may delete that note, if the applicable permission is granted to do so. However, managers who have the access right - DELETE NOTES – and a Short Name of ALL may delete notes written by any author.

To view the name of an icon on a line containing a student's appointment, rest the cursor on the icon. A tool tip will display the name.

1. After gaining access to the NOTEPAD for the desired student, click on the selected note. The DELETE button will be enabled.

2. Click on DELETE. A confirmation message will be displayed.

3. Click on YES.

4. Click on CLOSE.

26.4 Copy a Note

It may save time to copy a note from the Notepad for one student to the Notepad for another student, editing the note after copying it. To copy a note, follow the steps below:

1. From the Notepad, click on the selected note to be copied. The note will be highlighted.

2. Highlight the text to be copied.

3. Right click to display the standard Windows options for selecting, copying and pasting text.

4. Click on COPY.

5. Clear the Student ID/Name from the Notepad and enter the Student ID/Name for whom the copied note will be used.

6. Click on ADD.

7. Type in a new title in the TITLE field.

8. Click on the NOTE field, placing the cursor in that field.

9. Right click and select PASTE. The entire note will be pasted into the Note field.

10. Edit the note as desired for the other student.

11. When done, click on OK.

12. Click on CLOSE.

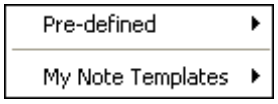
26.5 Use a Pre-defined Template

If the system administrator has created pre-defined note templates, they may be used in lieu of writing an entire note from scratch. If such templates exist, a TEMPLATE button will be displayed on the NOTE DETAIL screen for a selected student after clicking on ADD or APPEND.

1. From the NOTEPAD, enter the student's ID.

2. Click on ADD to display the NOTE DETAIL screen.

3. Click on TEMPLATE to display a sub-menu. One of the options will be PRE-DEFINED. Here is an example:



4. Left-click on the PRE-DEFINED option to display a sub-menu of templates created by the system administrator, and select the desired template description. This selection will be placed in the body of the notepad.

   -or-

5. Left-click on the MY NOTE TEMPLATES option to display a sub-menu of templates that you have created, and select the desired template description. This will be placed in the body of the note.

   Note
   If the MY NOTE TEMPLATES option is disabled, no such templates exist. See Section 26.6, below, to see how to create one.

6. If the template description field is blank, the template description of the first template that is selected will be inserted into that field. If that is not an appropriate description, click on the

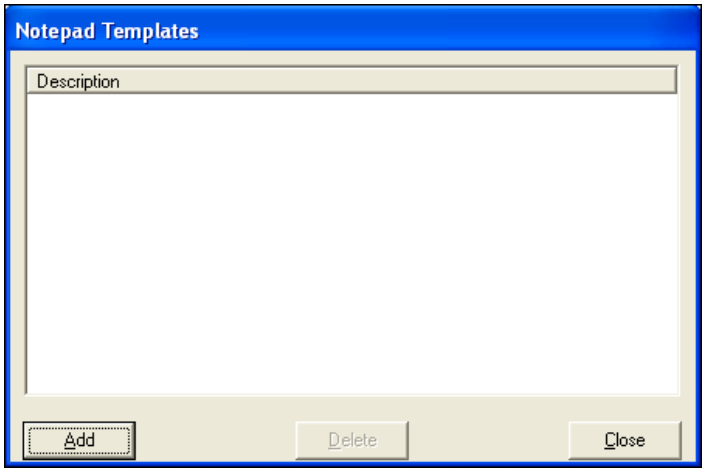
DESCRIPTION field and type in the desired description. This description label will be displayed on the MY NOTE TEMPLATES sub-menu if a user clicks on Templates when adding or appending a note for a selected student.

7. Click on OK.

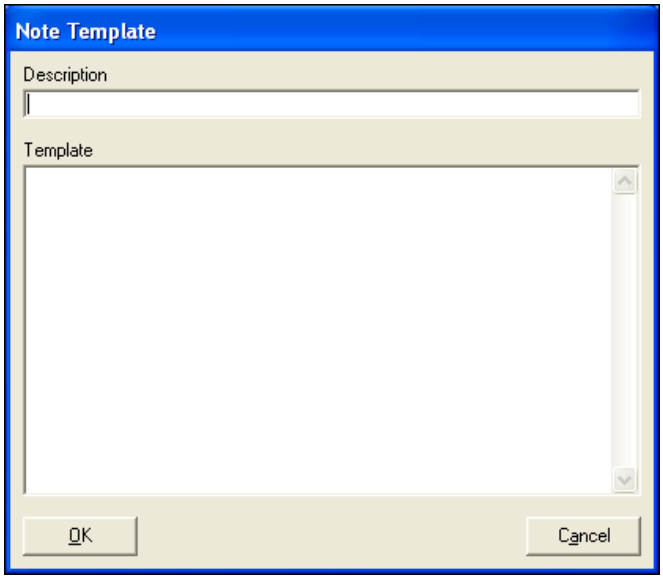
26.6 Create Your Own Template

If the system administrator has selected the option to ALLOW USER TEMPLATES, users may create their own templates when no pre-defined template is applicable. If this permission has been created, a MY TEMPLATES button will be displayed on the Notepad.

1. From the Notepad, click on MY TEMPLATES. The following NOTEPAD TEMPLATES screen will be displayed:



2. Click on ADD. The following NOTE TEMPLATE screen will be displayed.



3. Click on the DESCRIPTION field and type in the desired description. This description label will be displayed on the MY NOTE TEMPLATES sub-menu if the author subsequently clicks on Templates when adding or appending a note for a selected student.

4. Click on the TEMPLATE field and type in the text of the template.

5. Click on OK to return to the previous screen.

6. Repeat steps 1 – 5 to create other templates.

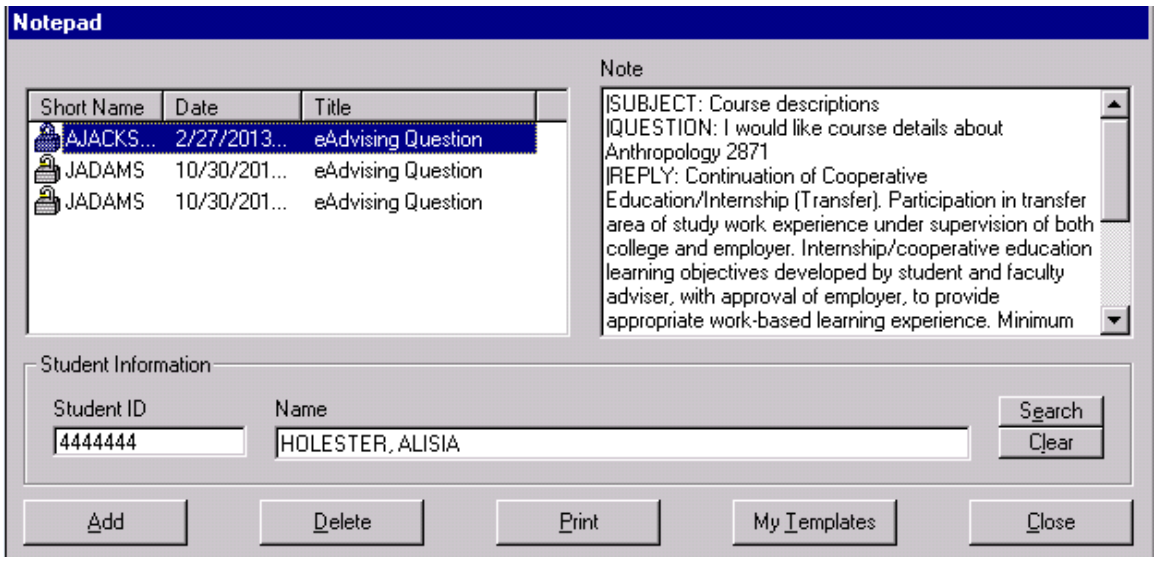
Note
To view or edit a template that has been created, double click on the desired description on the NOTEPAD TEMPLATES screen. This will display the text of the template that has been created.

26.7 View, Print, or Delete an eAdvising Question

Any eAdvising question that has been answered may be accessed from the Notepad on MY GRID by the advisor who answered the question.

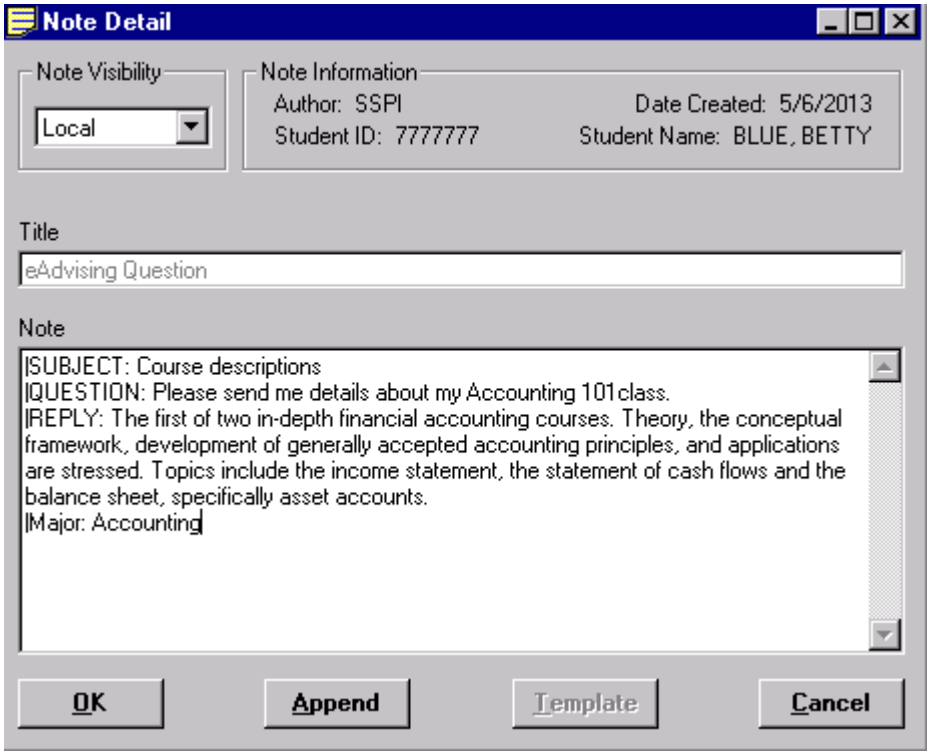
If any eAdvising answers to questions exist for a student with a booked appointment, the eAdvising column for that line will contain the following icon: . To view the name of an icon on a line containing a student's appointment, rest the cursor on the icon. A tool tip will display the name.

1. From MY GRID, click on the NOTEPAD button. Here is an example of a Notepad that will be displayed showing an eAdvising question:



2. To view the eAdvising question, double-click on the applicable line containing eAdvising under the Title column. The Note Detail screen will be populated by the Subject, Question, and Reply to that eAdvising question, as well as the description of the Additional Information question, if used.

Here is an example:



3. Proceed to print or delete the eAdvising question and answer.

4. Click on CLOSE.

SECTION 27 — DROP-INS

27.0 Overview

The Drop-in Screen was introduced in Section 14, Part III. This section discusses the following topics:

27.1 Select a Student from the Drop-in List

Note
If the NOTIFY WHEN STUDENTS WAITING option has been configured for this Location, an additional feature becomes enabled. If the Drop-in Screen is inactive or minimized and the number of students waiting is greater than zero, the button on the task bar and the title bar on the Drop-in Screen will flash. The flashing will continue until the Drop-In screen becomes the active window or the student is removed from the Waiting List. For this feature to be functional, the Auto Refresh setting must be checked as a default on the configuration settings for the Drop-in screen.

The DROP-IN screen in the STUDENTS WAITING mode defaults to a list of all students, in the order of arrival, who have registered on that specific date and have not yet been seen.

1. On the SARS MENU, click on DROP-IN to display the STUDENT DROP-IN SCREEN for today.

2. Click on LOCATION ▼ and then select the correct Location, if needed.

3. Double-click on the line on the DROP-IN screen containing the student's name. This action will display the DROP-IN APPOINTMENT screen.

4. In ADVISOR ▼, the name of the advisor who signed on to the system should be displayed automatically. If not, select your name from the menu. Click on OK. A confirmation message will be displayed and the Notepad button will be enabled.

5. Click on OK. You will be returned to the Drop-in Screen. The student's name will be removed from the STUDENTS WAITING list, but will be retained on the ALL STUDENTS list. A record of the activity will be added to the student history file, which can be viewed from STUDENT HISTORY.

Notes
If the steps listed above are performed for a date that is in the past, the system will prompt the user to enter the time that the student was assigned to the advisor.

If a student's name was selected in error, go to the ALL STUDENTS screen, double-click on the student's name to display the DROP-IN APPOINTMENT SCREEN, and click on RESTORE. After confirming the action, the name will be restored to the STUDENTS WAITING list showing the original time that the student was added to the list.

27.2 Change Information about a Student on the Drop-in List

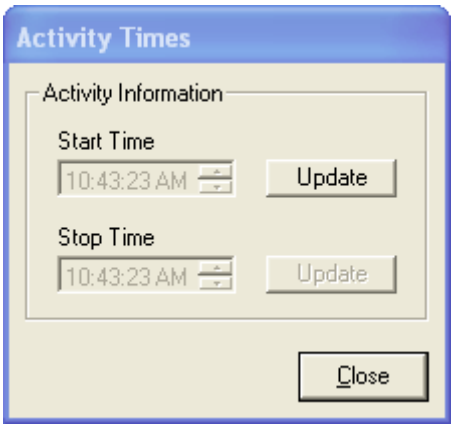
You may change any of the information on the DROP-IN APPOINTMENT screen except for the student's identifier.

1. Double-click on the student's name from the ALL STUDENTS list. The DROP-IN APPOINTMENT screen will be displayed for that student.
2. Change the information as desired.
3. Click on CLOSE. A confirmation message will be displayed.
4. Click on YES. You will be returned to the Drop-in Screen.

27.2.1 Set the Actual Start and Stop Times for a Drop-in Visit

The actual start time and stop time of a drop-in visit may be set after a student registers for a drop-in visit. To do this, open the DROP-IN APPOINTMENT screen.

1. Click on the applicable drop-in entry on the list.
2. If the screen is not expanded, click on MORE >>.
3. Click on SET ACTIVITY TIMES. Here is an example of the screen:



The options are:

- START TIME: Used to display the time that the drop-in visit started, which will be set when the advisor clicks on the adjacent

Update button. (The Start Time may be adjusted only by the system administrator.)

- UPDATE: Use to set the Start Time when the appointment begins.
- STOP TIME: Used to display the time that the drop-in visit ended, which will be set when the advisor clicks on the adjacent Update button. (The Stop Time may be adjusted only by the system administrator.).
- UPDATE: Use to set the Stop Time.
- CLOSE: Use to exit the screen.

4. When the student arrives in the advisor's office, click on the UPDATE button adjacent to the START TIME field. This will set the Start Time and the Activity Times screen will be closed automatically.

5. At the end of the visit, click on SET ACTIVITY TIMES again and then click on the UPDATE button adjacent to the STOP TIME field. This will set the Stop Time and the Activity Times screen will be closed automatically.

Note
Only a system administrator can adjust the Start and Stop Times by selecting or typing in a different start time, and then clicking on the adjacent UPDATE buttons.

27.3 Write a Note about a Student on the Drop-in List

This feature is available only after a student has been assigned to the advisor from the STUDENTS WAITING list.

1. Double-click on the student's name from the ALL STUDENTS list. The DROP-IN APPOINTMENT screen will be displayed for that student with the reason(s) for the visit displayed at the top of the REASON CODE list.

Note
In SHORT NAME ▼, the name of the advisor who signed on to the system should be displayed automatically. The NOTEPAD button will be enabled.

2. Click on NOTEPAD to display the Notepad for that student. It will display the student's name and ID.

3. Click on ADD.

4. Click on NOTE VISIBILITY ▼ and select from the menu the security level desired for this note. The options are:

- LOCAL: Use to allow all users who have access rights to View Notes in your Location to view the note.
- PRIVATE: Use to make the note viewable by the author's eyes only.

- PUBLIC: Use to allow all users who have access rights to View Notes in any Location to view the note.

5. Click on the TITLE field and then type a description that summarizes the content of the note. The field will allow up to 50 characters.

6. Click in the space provided under NOTE and type the note. The field will allow up to 65,000 characters (approximately five pages per note) and an unlimited number of notes per student.

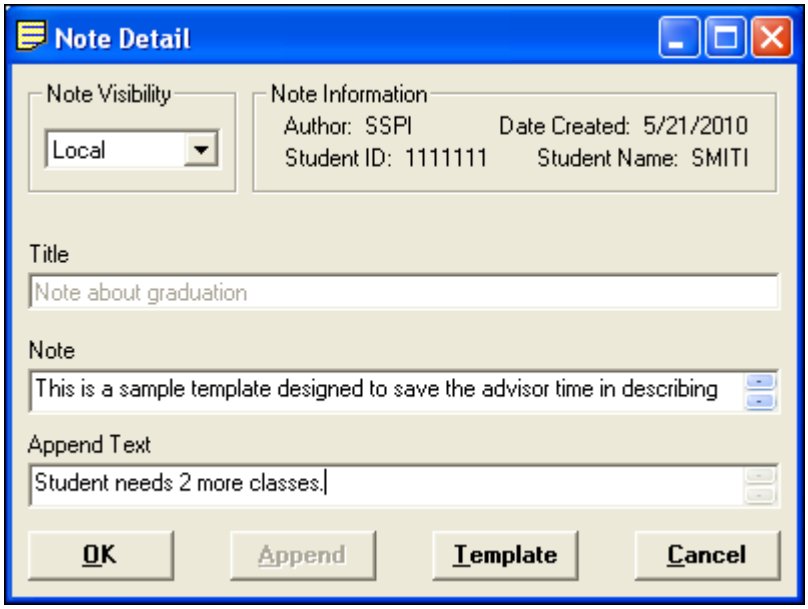
7. Click on OK.

Warning
Changes cannot be made to the note after saving, but an addendum may be written.

8. To append a note to an existing note, double click on the note from the NOTEPAD.

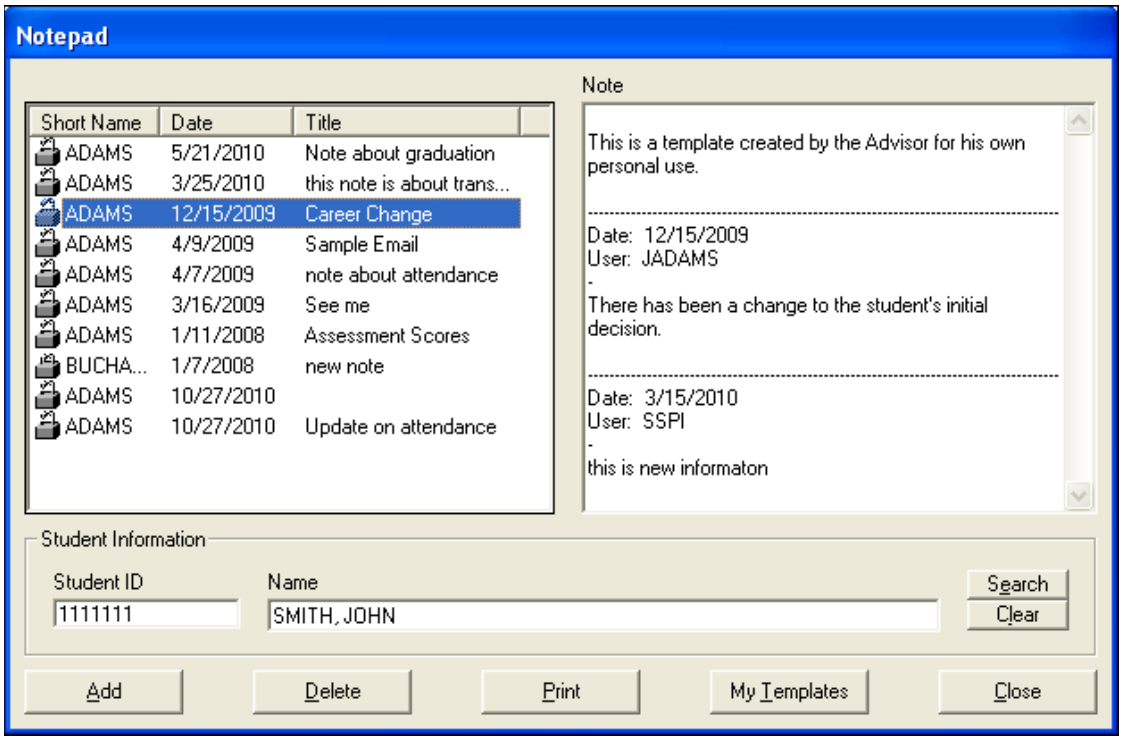
   a. Click on APPEND. The NOTE DETAIL screen will be elongated and will provide an APPEND TEXT field.

Here is an example:



b. Click on the space under Append Text and type in the desired note.

c. Click on OK. The note will be appended to the original note. Here is an example of the Notepad showing an appended message:



9. To clear the Notepad for another entry in ID or NAME, click on CLEAR. Then enter a new name and click on SEARCH or enter a new identifier. Then repeat steps 3 – 8 in this section, as desired.

10. When done, click on CLOSE.

Tip
Reason Code Descriptions may be transferred for the selected appointment to the body of the note by pressing **F4**. Before using this feature, be sure to update the Reason Codes on the Student Appointment screen.

27.4 Add a Student to the Drop-in List

Users may add and delete students from the drop-in list and also assign the student to the advisor who is handling the visit. The Drop-in Screen in the STUDENTS WAITING mode defaults to a list of all students, in the order of arrival, who have registered on that specific date and have not yet been seen.

1. On the SARS MENU, click on the DROP-IN button to display the STUDENT DROP-IN SCREEN.

2. If the DATE option is not disabled, click on DATE and type in the desired date, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

Tip
To back up one day, press **F2**. To move forward one day, press **F3**.

3. Click on ADD to display the DROP-IN APPOINTMENT screen.

4. Complete the following information on the DROP-IN APPOINTMENT SCREEN, using either the ENTER or the TAB key to move from field to field. The first two steps are required; the remaining steps are optional.

   a. Select one of the options below to enter the student's identifier.

   - Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   - If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   - If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 34.2.

   - If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7***. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

     * **F7** will only generate a temporary or guest ID if the Location using the Drop-in Screen is configured in SARS·UTIL with at least the minimum required settings for the Location. Those minimum settings are:

     - GRID Settings: Time Increment, Start Time, Stop Time, all three Booked Appointment Codes, and Default Master Schedule Code.

     - MISC Settings: Primary ID Format.

See Section 4, Set Up the Application, in Part I of this Manual.

Note
The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

Notes
If a student previously scheduled an appointment or if information about a student is stored in a school maintained database to which SARS·GRID has access, Name, and possibly Birth Date, Home and/or Contact Phone (if this information is in the database) will appear automatically after typing the ID. However, the information must be stored in the database under the ID format that is being used.

If USE STUDENT CLASSES has been activated in SARS·UTIL, a Course Selection screen will be displayed after the student's ID is entered. The screen will list all the classes in which the student is enrolled. To add those classes to the Reason Codes list:
(i) Click on one or more classes to be included as Reason Codes.
(ii) Click on SELECT.
The selected courses will be placed at the top of the Reason Code list and will be available for selection as reasons for the drop-in visit.

b. Type the student's LAST NAME, FIRST name in NAME (for example, SMITH, JOHN). The last name first method will render reports sorted by student names more usable.

c. Type the student's birth date in BIRTH DATE. (Birth year will accept 2 or 4 digits. The century defaults to 20 for years 00 to 29. The century defaults to 19 for years 30 to 99. To override the default, you must enter the 4-digit date.)

d. Type the student's permanent telephone number in HOME PHONE and any extension in EXTENSION.

e. Type the student's contact telephone number in CONTACT PHONE and any extension in EXTENSION.

f. Type the student's text phone number in TEXT PHONE, if the student has a cell phone with text messaging capabilities.

g. Click on the icon adjacent to ADDRESS INFORMATION and then type the student's street address, city, state, zip code, and e-mail address(es).

h. In the STUDENT CONTACT METHODS panel, click on CALL, EMAIL and/or TEXT to specify the acceptable methods of contacting the student. Any combination or none may be selected.

i. The default Reason Code (e.g., DROPIN) will be highlighted, if the DEFAULT REASON CODE option has been established. To select additional Reason Codes (e.g., CAREER), click on the selected options in the REASON CODE field. (Use the scroll bar if the list extends beyond the viewable screen.)

Note
If you wish to generate statistical reports on the reasons why students request appointments, you must select one or more Reason Codes.

j. Enter specific information about the reason for making the appointment in the COMMENTS field. The field will accept up to 255 characters.

Note
Comments will be displayed on the Drop-in Screen. Use discretion when entering any comments.

k. If the USE SHORT NAME ASSIGNMENTS option has been selected, the name of the advisor to whom this student is assigned will be displayed in the Advisor field. Otherwise, click on ADVISOR ▼ and then on a specific name to enter the student's preference, or leave the option at NEXT to indicate that the student has not expressed a preference and should see the next available individual.

Note
If the selected advisor is different from the individual assigned to the student, a warning message will be displayed.

Click on YES to confirm that a different individual should be assigned for this appointment, or click on NO to select the assigned advisor.

l. For additional options, click on MORE>>. This is a toggle button. (After it is clicked, the button is renamed <<LESS.)

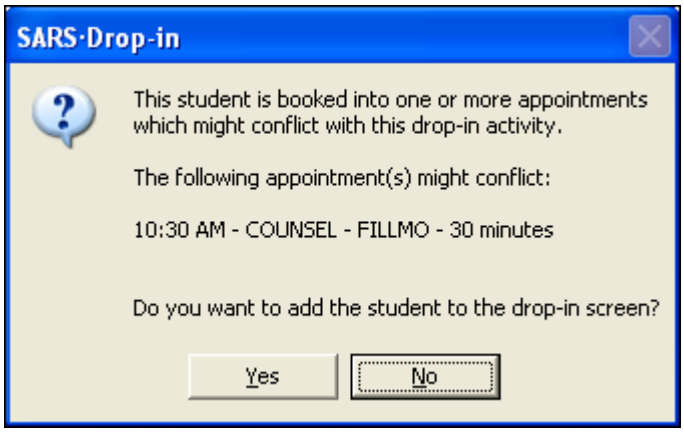
m. If the ADDITIONAL INFO button is enabled, the user may view information about the student, and if permitted, also enter or change information about a student. Click on ADDITIONAL INFO to display the ADDITIONAL INFORMATION screen. Review or record the student's response to each question. Each question allows for a date, list, text or yes/no response. Click on SAVE to save new or changed information; click on CLOSE to exit without saving. (Also see "Additional Information" in this Part, Section 7.5.10.).

n. Any existing alerts about that student will pop up on your screen after the student's ID is entered. Any Early Alerts created in the SARS·ALRT application will pop up first, followed by any SARS·GRID alerts. If an Early Alert is displayed, click on TRANSFER REASONS to include those reasons in the student's appointment. (Also see Alerts in this Part, Section 29.)

o. To link the topic of the current visit to a different term, as opposed to the current term (e.g., discussion of an Ed Plan for the next semester), click TERM ▼ and select the desired Term.

p. Review the INFO FLAGS panel to see whether the student has completed key actions toward matriculation goals.

5. Click on COMMIT DROP-IN. If the drop-in visit for this student might conflict with a pending appointment, a warning screen may be displayed. Here is an example:



Note
Only users who have GRID - ACCESS or VIEW STUDENT HISTORY permissions will be able to see the actual Location and Short Name for the conflicting appointment. In order to preserve student confidentiality, other users will see an asterisk (*) with the following message: "Details about the Location and Short Name are not available based on your permission level."

6. To confirm the action, click on YES. Otherwise, click on NO and advise the student of the conflicting appointment.
7. Click on COMMIT DROPIN. The student's name will be added to the STUDENTS WAITING Screen.

27.5 Print the Drop-in List

Two versions of the DROP-IN REPORT are available: ALL STUDENTS and STUDENTS WAITING. The drop-in list that is currently displayed will be printed. The report displays the following information: Student Name, Student ID, Advisor, Arrival Date and Time, Time Serviced, Time Waiting (elapsed time between check-in time and the time that each student was seen), Comments, total counts for the total number of Drop-ins Seen and the number of Drop-ins Not Seen, the Average Wait Time for those students who were seen, and the total number of students who were deleted from the list.

Data from the Drop-In List may be exported to a batch file. The list may then be used in SARS·CALL to send messages via automated calling or in SARS·MSGS to send messages via automated texts or emails to send messages via automated calling or emails. Be sure that the ALL STUDENTS mode (SHOW ALL) is displayed before clicking on EXPORT.

1. Click on either SHOW ALL or WAITING to display the desired screen.

2. Click on PRINT to display the setup screen. Here is an example:

3. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

4. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

5. Click on SUPPRESS ID, as desired, to hide student IDs from the report printout.

6. To view the report on the screen, click on PREVIEW REPORT, then click on PRINT.

7. To print the report, click on PRINT

   Here is an example of the ALL STUDENTS version of the report.

Drop-in Report – All Students

From 5/26/11 to 5/26/11

Student Name	Student ID	Name	Date	Arrived	Serviced	Waiting	Comments
SMITH, JOHN	*******	John Adams	5/26/11	2:30 PM	2:41 PM	11 Mins	
RED, RUBY	*******	John Adams	5/26/11	2:33 PM	3:01 PM	28 Mins	
YELLOW, YVETTE	*******	Abe Lincoln	5/26/11	2:34 PM	2:35 PM	1 Min	
ORANGE, ODIE	*******	Abe Lincoln	5/26/11	2:45 PM			
BLUE, BARNEY	*******	J Buchanan	5/26/11	2:51 PM			-Deleted
GREENE, SUSAN	*******	J Buchanan	5/26/11	2:57 PM			

Drop-ins Seen: 3 Drop-ins Not Seen: 3 Average Wait Time: 13 Mins Deleted: 1

Printed 5/26/11 3:33:45 PM Location: ADVISING

8. To export the report to another format,

   a. Make sure that the screen is displayed in the ALL STUDENTS (SHOW ALL) mode.

   b. Click on EXPORT. A SAVE REPORT screen will be displayed.

   c. Click on SAVE IN ▼ and then select the location in which the report will be stored.

   d. In the FILE NAME field, type in a file name for the report.

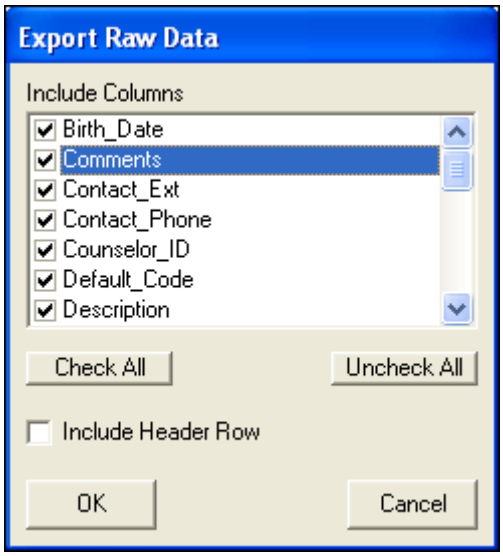
e. Click on SAVE AS TYPE ▼ and then select the file format in which the report will be saved. The options are:

PDF Files (*.PDF)
Excel Files (*.XLS)
Text Files (*.TXT)
HTML Files (*.HTM)
Rich Text Files (*.RTF)
Tiff Files (*.TIF)
Raw Data (*.CSV)
SARS·CALL Batch Files (*.SC)

f. Click on SAVE.

9. If Raw Data (*.CSV) is selected, an Export Raw Data screen will be displayed showing a list of columns that are contained in that particular report.

Here is an example:



The options are:

- INCLUDE COLUMNS: Use to select the data elements to be exported. All data elements available in any given report will be available for selection. The data elements displayed on the list will vary, depending on the report that is being exported.
- CHECK ALL: Use to select all data elements for the selected report.
- UNCHECK ALL: Use to de-select all data elements that are available for the selected report.
- INCLUDE HEADER ROW: Use to include the title of each column exported.
- OK: Use to approve the selections.

- CANCEL: Use to undo the selections.

a. The default is that all data columns will be checked for export. To de-select a column, click on the checkbox for the data element that should not be exported.

b. Click on the Include Header Row checkbox if you want the column titles to be exported, as well.

c. Click on OK.

The report will be available for use in the selected format.

10. Click on CLOSE.

27.6 Delete a Student from the Drop-in List

If a student is deleted from the STUDENTS WAITING list, the name will remain on the ALL STUDENTS list. Deleting a student from the ALL STUDENTS list, however, is an irrevocable action. If you wish to generate a DROP-IN REPORT showing all students who made drop-in visits, regardless of whether they were seen by an advisor, do not delete names from the ALL STUDENTS list. If a student is deleted from either list, the original entry will not be stored in the student's history.

1. On the STUDENTS WAITING Screen, click on the line containing the student's name for whom the drop-in visit is being cancelled.

2. Click on DELETE. A confirmation message will be displayed.

3. Click on YES.

Note
To restore a student's name that was deleted from the STUDENTS WAITING list, go to the ALL STUDENTS screen, double-click on the student's name to display the DROP-IN APPOINTMENT SCREEN, and click on RESTORE. After confirming the action, the name will be restored to the STUDENTS WAITING list with the original arrival time.

SECTION 28 - REASONS AND COMMENTS

28.0 Overview

Advisors may record or change Reason Codes and Comments for booked appointments either from the STUDENT APPOINTMENT SCREEN or from the ROSTER. Comments for non-appointment activities may be recorded or changed using the COMMAND MENU on MY GRID.

The different steps for recording Reasons and Comments are discussed in the following sections:

28.1 Booked Appointments

28.2 Non-Appointment Activities

28.1 Booked Appointments

1. From MY GRID, for an individual appointment, double-click on the row containing the student's name to display the STUDENT APPOINTMENT screen.

   -or-

2. From MY GRID, for a group appointment, double-click on the row containing the appointment. If the appointment is not full, the STUDENT APPOINTMENT screen will be displayed.

   Note
   If the appointment is at capacity, the ROSTER will be displayed immediately. Skip to step c, below.

   a. Click on MORE>>.

   b. Click on ROSTER.

   c. Click on the selected student name to display the STUDENT APPOINTMENT screen.

3. The REASON CODE field will display the selected reasons for making the appointment at the top of the list. (Use the scroll bar if the list extends beyond the viewable screen.)

   a. Click on any reasons to be de-selected.

   b. Click on any reasons to be added.

4. Enter or change the Comments in the space provided, which will allow up to 255 characters.

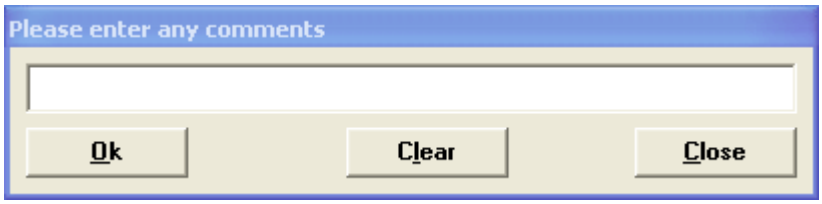
5. Click on CLOSE. A confirmation message will be displayed.

6. Click on YES.

28.2 Non-appointment Activities

1. From MY GRID, with the focus on the specific line for which comments are to be entered, right-click to display the COMMAND MENU.

2. Click on ENTER/CHANGE COMMENTS. The following screen will be displayed.



3. Enter or change the Comments in the space provided, which will allow up to 255 characters.

4. Click on OK to save the entries and return to the MY GRID.

SECTION 29 ALERTS

29.0 Overview

This section discusses the following options in dealing with alerts:

29.1 View or Record an Alert from a Booked Appointment

29.2 View or Record an Alert from an Un-booked Row on MY GRID

29.3 Delete an Alert from a Booked Appointment

29.4 Delete an Alert from an Un-booked Row on MY GRID

You may wish to use the SARS·GRID Alert feature in the following situations: reminding a student to bring needed documents to the appointment or identifying the student as a repeated "no show." The Alert screen can accommodate up to 2,000 characters. The alert is tied to the student's ID, not to a scheduled appointment.

Note
These methods may be used only if a student's ID already exists in the database being used. The ID is in the database once the first appointment is scheduled or if student data from an external source has been loaded in the database being used.

Users may view SARS·GRID Alerts for all Locations to which they have been assigned. Any existing alerts about that student will pop up on your screen whenever you double-click on the student's booked appointment on MY GRID, or when you use the Command Menu to go to Alerts while focused on a booked appointment. Existing alerts about a student will also pop up on your screen when you use the Command Menu to go to Alerts and enter the student's ID, or when you enter the student's ID on the STUDENT APPOINTMENT screen.

Alert screens may appear in varying sequences and formats, depending on whether more than one SARS·GRID Alert exists for a student and whether the school is also using SARS·ALRT (Early Alerts).

In addition to Early Alerts, there are four SARS·GRID Alert types available. They are:

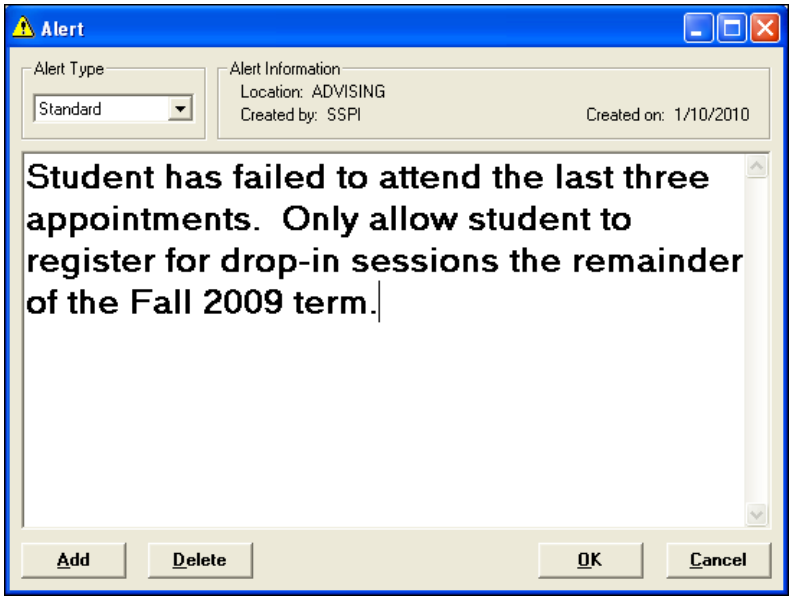
- GLOBAL ALERT: Use to create an Alert that will be automatically displayed in all Locations. This type of alert, of which there may only be one per student, can only be created (and deleted) by any system administrator with User Name Maintenance access rights. The manager's User Name and the date it was written will be embedded in the Global Alert. Only a user with the same access rights may delete it.

- PRIMARY ALERT: Use to create an Alert that will be designated to be the first alert displayed, after the Global Alert, when more than one alert exists for a student. Only one Primary Alert per Location can exist for a student, and this type of alert can only be deleted by the user who created it or a system administrator with UTIL·- USER NAME MAINTENANCE access rights.

- STANDARD ALERT: Use to create a regular Alert. A standard alert will be displayed after any Global and Primary Alert.
- STUDENT ALERT: Use to create an Alert to be viewed by the student when logging into the web interface (*e*·SARS) or when using SARS·TRAK.

If only one alert exists for that student, it will be displayed in full. Multiple alerts will be displayed on a list. If an Alert on a list cannot be read in its entirety, double-click on the row containing that Alert to display it in full.

Here is an example of the ALERT screen if a student has only one SARS·GRID Alert:



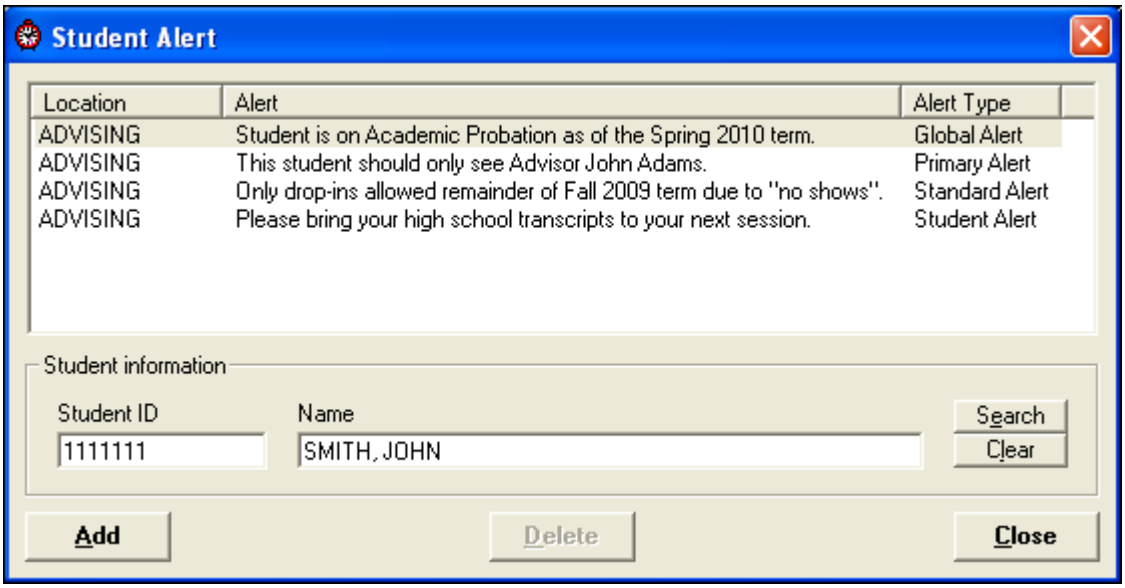
The Alert Type, Location, Author and Creation Date will be displayed in a panel at the top of the Alert.

The options are:

- ALERT TYPE: Use to select the type of alert (e.g., Primary, Global, Standard, or Student.)
- ADD: Use to add more information to this SARS·GRID Alert.
- DELETE: Use to delete this alert.
- OK: Use to save information that has been added to the alert.
- CANCEL: Use to close the screen without saving any new information.

Tip
This Alert screen may be re-sized to display a longer message without scrolling.

Here is an example of the STUDENT ALERT screen if a student has more than one SARS·GRID Alert, but no Early Alert:



The Location, Alert, and Alert Type will be displayed.

The options are:

- STUDENT INFORMATION: Use to display or enter identifying information about a student.

  STUDENT ID: Use to display or enter the student's ID.

  NAME: Use to display or enter the student's name.

  SEARCH: Use to find a student whose ID is not known.

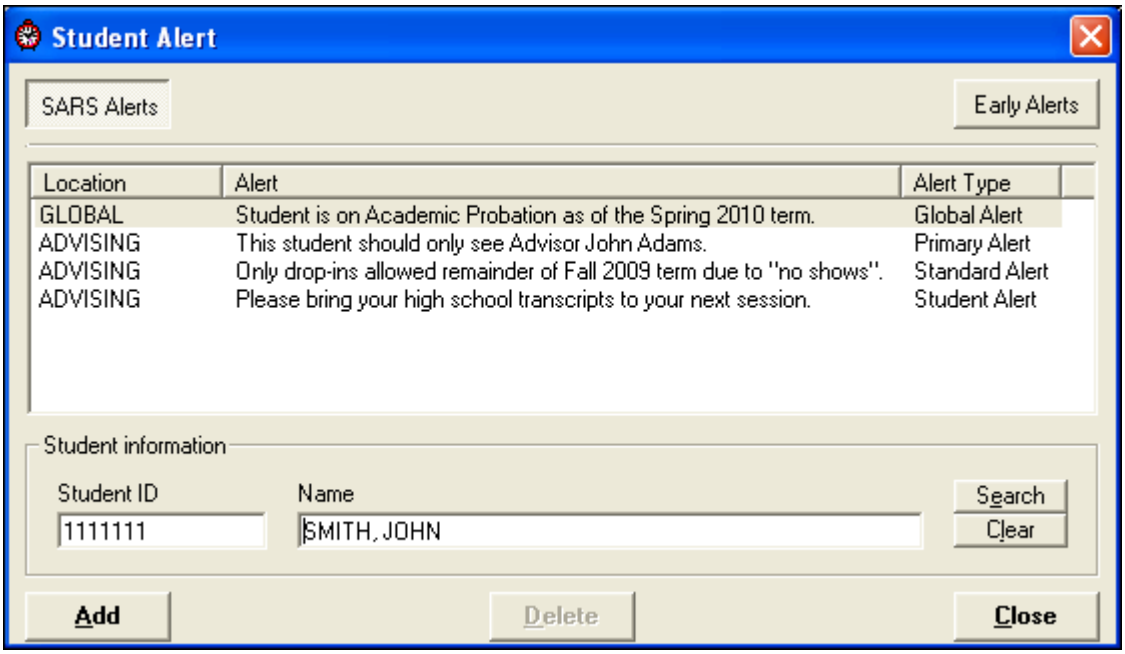
  CLEAR: Use to clear the screen for another entry.

- ADD: Use to make the fields available for an entry. (Not applicable for Early Alerts.)

- DELETE: Use to remove data. (Not applicable for Early Alerts.)

- CLOSE: Use to exit the screen.

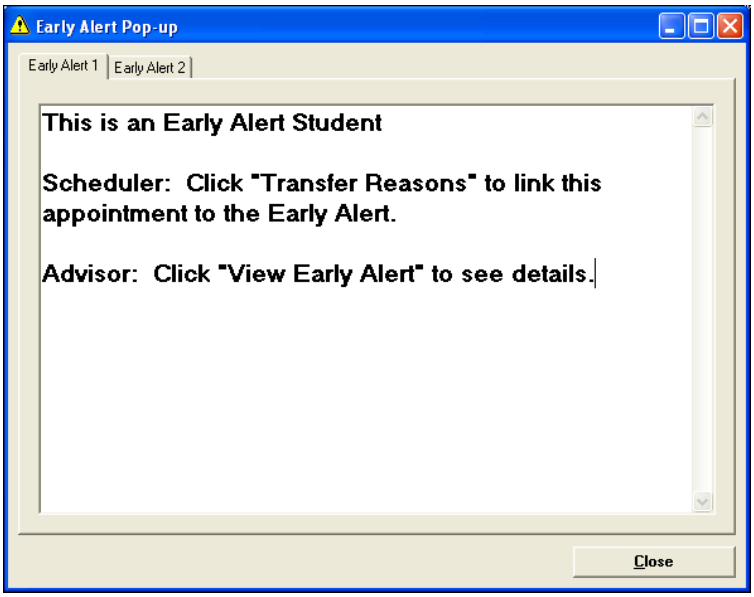
Here is an example of the STUDENT ALERT screen when the student has more than one SARS·GRID Alert, as well as one or more Early Alerts:



The additional options are:

- SARS ALERTS: Use to display a list of SARS·GRID Alerts. This is the default mode.
- EARLY ALERTS: Use to display the EARLY ALERT POP-UP screen, from which any Early Alerts may be viewed.

Here is an example of the EARLY ALERT POP-UP screen when any Early Alerts about the student exist:



The creation date and name of the author will be embedded in the body of the Alert.

The options are:

- TRANSFER REASONS: Use to include the reasons created in the Early Alert in the student's appointment. (This is used only when booking an appointment.)
- CLOSE: Use to exit the screen.

29.1 View or Record an Alert from a Booked Appointment

Advisors may view or record alerts for all Location to which they have been assigned.

1. If this icon appears in the Alerts column for the row on MY GRID that contains a booked appointment, an alert exists for that student. (To view the name of the icon, rest the cursor over it.)

   a. Single left click on the icon,

      -or-

      Right click to display the COMMAND MENU; then left click on ALERT.

   b. If any SARS·GRID Alerts exist, they will pop up automatically.

      i) Review the message(s). Then click on OK or CANCEL to exit the screen.

      -or-

      ii) To edit or append text to an existing standard or student SARS·GRID Alert, type the changes directly onto the existing alert and click on OK to exit the screen. (Primary and Global alerts cannot be edited or appended. They must first be deleted and then re-created.)

      -or-

      iii) To enter another SARS·GRID Alert, click on ADD. Click on ALERT TYPE ▼ and then select the type of alert (global, primary, standard, or student). In the body, type a message. Click on OK to exit the screen.

Note
If any Early Alerts about the student exist, an EARLY ALERT POP-UP screen will be displayed after exiting any SARS·GRID Alert. Tabs will indicate one or more Early Alert (e.g., Early Alert 1, Early Alert 2, etc.). The most recently created Early Alert is always found using Early Alert 1 tab.

i) Review the alert under Early Alert 1 tab, to which the system defaults.
ii) To view any other Early Alerts, click on Early Alert tab 2, etc.
iii) When done, click on CLOSE.

Early Alerts cannot be added, edited or deleted in SARS·GRID.

2. If no SARS·GRID Alerts exist, right-click to display the COMMAND MENU, then left-click on ALERT.

   -or-

3. Double-click anywhere in the row containing the booked appointment to display the STUDENT APPOINTMENT screen and click on ALERT.

   a. Click on ADD.

   b. Click on ALERT TYPE ▼ and then select the type of alert (global, primary, standard, or student).

   c. In the body, type a message.

   d. Click on OK to exit the screen.

29.2 View or Record an Alert from an Un-booked Row on MY GRID

1. When not booking an appointment, right click to display the COMMAND MENU and then left click on ALERT and enter the student's ID. Any existing alerts will pop-up on the screen.

   -or-

2. When booking a new appointment, double-click on the available appointment time slot to display the STUDENT APPOINTMENT screen. Any existing alerts will pop-up on the screen. Click on ALERT.

3. Select one of the options below to enter the student's identifier.

   - Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   - If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   - If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

   - If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

   Note
   The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

4. In the absence of any Global or Primary Alerts, if any Early Alerts about the student exist, an EARLY ALERT POP-UP screen will first be displayed. Tabs will indicate one or more Early

Alert (e.g., Early Alert 1, Early Alert 2, etc.). The most recently created Early Alert is always found using Early Alert 1 tab.

a. Review the alert under Early Alert 1 tab, to which the system defaults.

b. To view any other Early Alerts, click on the Early Alert 2 tab, etc.

c. While viewing the Early Alert tab for which an appointment is being made, click on TRANSFER REASONS to transfer the reasons created in the Early Alert to the student's appointment. Those reasons will be added to the STUDENT APPOINTMENT screen for the selected appointment, and the EARLY ALERT POP-UP screen will close.

Note
Early Alerts cannot be added, edited or deleted in SARS·GRID.

5 If any SARS·GRID Alerts exist, they will pop up automatically next.

a. Review the message, then click on OK or CANCEL to exit the screen.

b. To enter a new SARS·GRID alert, click on ADD. Click on ALERT TYPE ▼ and then select the type of alert (global, primary, standard, or student). In the body, type a message. Click on OK to exit the screen.

c. To edit or append text to an existing SARS·GRID alert, type the changes directly onto the ALERT screen and click on OK to exit the screen. (This is not applicable to Early Alerts, which cannot be edited in SARS·GRID.)

Reminder
Primary and Global alerts cannot be edited or appended. They must first be deleted and then recreated.

29.3 Delete an Alert from a Booked Appointment

Note
Only alerts created in SARS·GRID may be deleted. Early Alerts **cannot** be deleted in SARS·GRID.

If an action required by an alert has been taken or if the alert is no longer applicable, the alert should be deleted. Only the user who created A Global or Primary alert may delete that type of alert. Any user who is able to read a Student or Standard Alert may delete that type of alert.

1. If this icon [!] appears in the Alerts column for the row on MY GRID that contains a booked appointment, an alert exists for that student.

2. Left click on the icon. Any existing alerts will be displayed.

3. If the alert is on a list, click on the alert to be deleted.

4. Click on DELETE. A confirmation message will be displayed.

5. Click on YES.

29.4 Delete an Alert from an Un-booked Row on MY GRID

Note
Only alerts created in SARS·GRID may be deleted. Early Alerts **cannot** be deleted in SARS·GRID.

If an action required by an alert has been taken or if the alert is no longer applicable, the alert should be deleted. Only the user who created A Global or Primary alert may delete that type of alert. Any user who is able to read a Student or Standard Alert may delete that type of alert.

1. When focused on any row on MY GRID that does not display a booked appointment, right-click to display the COMMAND MENU, then left-click on ALERT.

2. Select one of the options below to enter the student's identifier.

   - Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   - If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   - If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

   - If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

     Note
     The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

3. If the alert is on a list, click on the alert to be deleted.

4. Click on DELETE. A confirmation message will be displayed.

5. Click on YES.

SECTION 30 — ADDITIONAL INFORMATION

30.0 Overview

Before the Additional Information feature is available, a list of questions that will provide more detailed information about the student must be established in LOCATION MAINTENANCE. The list of questions will apply to all students in the selected Location. Additional Information is tied to a student's identifier, not to a scheduled appointment.

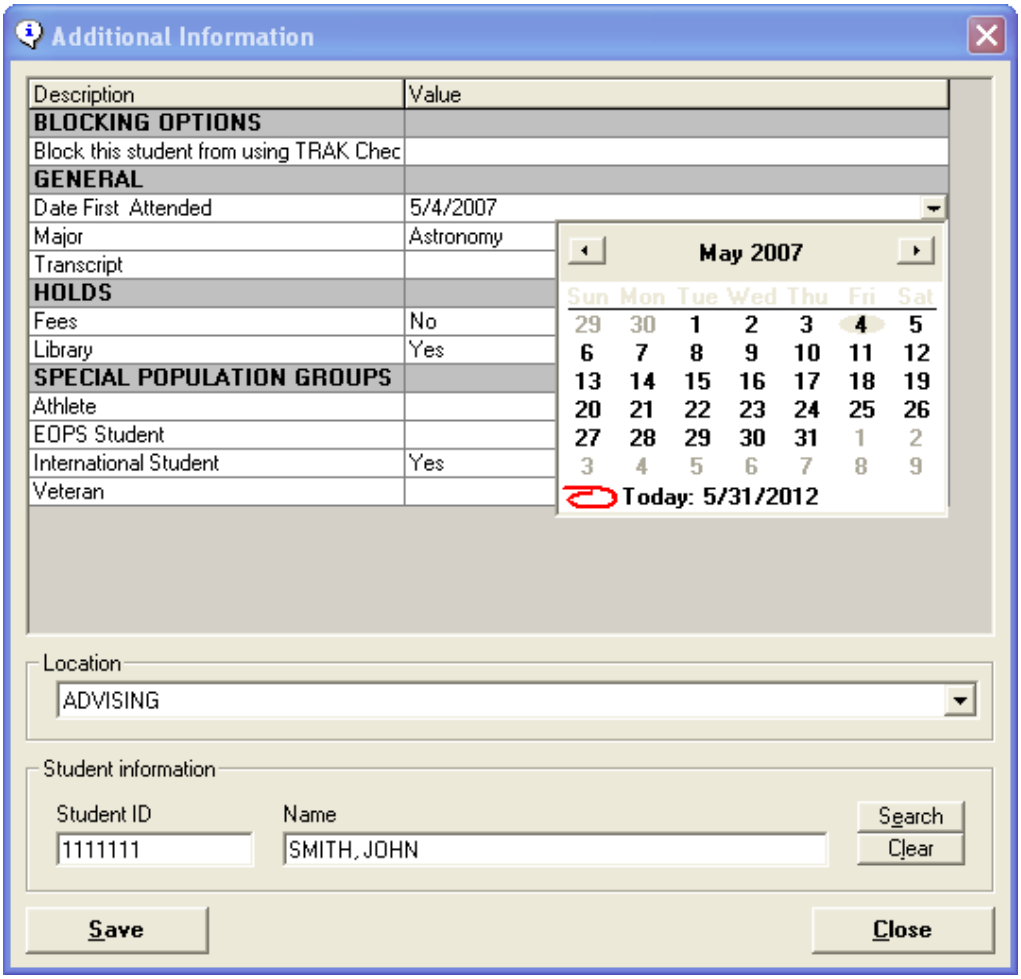
The options for working with Additional Information are discussed in the following sections:

30.1 From a Booked Appointment

30.2 From an Un-booked Row on MY GRID

30.3 From a Group Appointment

Here is an example of the screen layout.



The Additional Information screen will appear showing the following options:

- DESCRIPTION: Use to view the Additional Information question.
- VALUE: Use to view or enter a response to an Additional Information question. The value will contain a Date, List, Text or Yes/No response.
- LOCATION: Use to specify the name of the Location in which the additional information is stored.
- STUDENT INFORMATION: Use to display or enter identifying information about a student.

  ID: Use to display the student's identifier (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

  NAME: Use to display the student's last name, first name.

  SEARCH: Use to find a student whose ID is not known.

  CLEAR: Use to clear the screen for another entry in ID or NAME.
- SAVE: Use to save new entries or changes made on the screen.
- CLOSE: Use to exit without saving.

30.1 From a Booked Appointment

1. If this icon appears in the Additional Info column for that row, additional information for that student exists. Single left click on the icon,

   -or-

   Right-click to display the COMMAND MENU, then left-click on ADDITIONAL INFO. Any existing additional information about that student will be displayed.

2. Review the student's response to each question. Each question allows for a date, list, text, or yes/no response. The following are examples:

Date First Attended?	9/6/2006
Major?	Art
Veteran?	Yes

3. If the user has been given permission to enter a response to one or more questions follow the steps below:

   a. For a DATE response, click on the row in the VALUE column adjacent to the question and type in the desired date, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

   b. For a LIST response (e.g., Major), click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu. To select more than one

option from the list, after clicking on the line, hold down the Control key and then click on each item to be included.

c. For a TEXT response, click on the row in the VALUE column adjacent to the question. Type in a response.

d. For a YES/NO response, click on the row in the VALUE column adjacent to the question. Select a response from the drop down menu.

4. Click on SAVE to save new or changed information and return to MY GRID.

30.2 From an Un-booked Row on MY GRID

1. From anywhere on MY GRID, right-click to display the COMMAND MENU.

2. Left-click on ADDITIONAL INFO to display the ADDITIONAL INFORMATION screen.

3. Select one of the options below to enter the student's identifier.

   a. Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   b. If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   c. If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

   d. If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

   Note
   The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

4. If the student's identifier is not known, type the student's name or a portion thereof in NAME and click on SEARCH. If only one match is found, any existing Additional Information about that student will be displayed. If more than one match is found, a list of all students with that name will appear.

   a. Click on the selected name.

   b. Click on OK. A list of any existing Additional Information about that student will be displayed.

5. Review the student's response to each question. Each question allows for a date, list, text, or yes/no response. The following are examples:

Date First Attended?	9/6/2006
Major?	Art
Veteran?	Yes

6. If the user has been given permission to record a response to one or more questions follow the steps below:

   a. For a DATE response, click on the row in the VALUE column adjacent to the question. Type in the desired date, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

   b. For a LIST response (e.g., Major), click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu. To select more than one option from the list, after clicking on the line, hold down the Control key and then click on each item to be included.

   c. For a TEXT response, click on the row in the VALUE column adjacent to the question. Type in a response.

   d. For a YES/NO response, click on the row in the VALUE column adjacent to the question. Select a response from the drop down menu.

7. Click on SAVE to save new or changed information.

30.3 From a Group Appointment

1. From MY GRID, double-click on the row containing the group appointment to display the STUDENT APPOINTMENT screen. (If the appointment is full, the ROSTER will appear immediately. Skip to step 4.)

2. Click on MORE>>.

3. Click on ROSTER.

4. Click on the student for whom additional information is being recorded.

5. Click on ADDITIONAL INFO to display the ADDITIONAL INFORMATION screen. Any existing additional information about that student will be displayed.

6. Review the student's response to each question. Each question allows for a date, list, text, or yes/no response. The following are examples:

Date First Attended?	9/6/2006
Major?	Art
Veteran?	Yes

7. If the user has been given permission to record a response to one or more questions follow the steps below:

   a. For a DATE response, click on the row in the VALUE column adjacent to the question. Type in the desired date or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

b. For a LIST response (e.g., Major), click on the line in the VALUE column adjacent to the question. Select a response from the drop down menu. To select more than one option from the list, after clicking on the line, hold down the Control key and then click on each item to be included.

c. For a TEXT response, click on the row in the VALUE column adjacent to the question. Type in a response.

d. For a YES/NO response, click on the row in the VALUE column adjacent to the question. Select a response from the drop down menu.

8. Click on SAVE to save new or changed information and return to the ROSTER.

9. Click on CLOSE to return to the STUDENT APPOINTMENT screen.

10. Click on CLOSE to return to MY GRID.

SECTION 31 — ADDRESS INFORMATION

31.0 Overview

The ADDRESS INFORMATION feature enables users to view, add or edit a student's mailing address and/or e-mail address.

The following sections discuss the steps for using this feature:

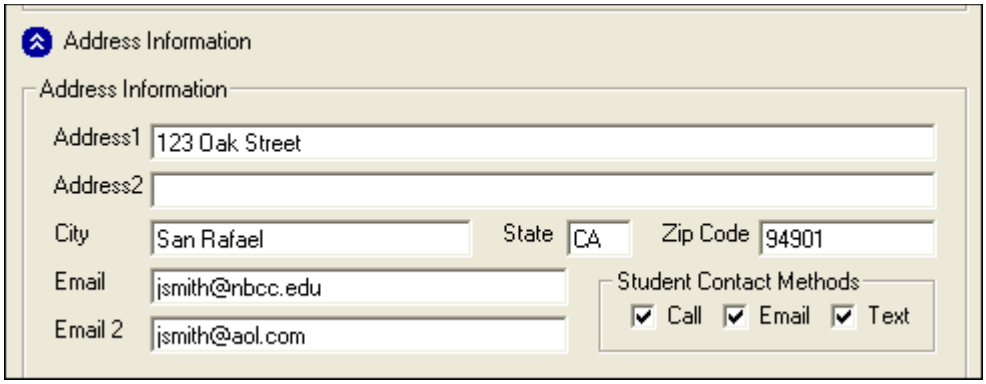
31.1 From a Booked Appointment

31.2 From an Un-booked Row on MY GRID

31.1 From a Booked Appointment

1. From MY GRID, double-click on the row containing the student's name to display the STUDENT APPOINTMENT screen.

   a. Click on the icon adjacent to ADDRESS INFORMATION to expand the screen to display address fields. Here is an example:



   b. View or enter the student's street address, city, state, zip code, and e-mail address(es).

   Note
   The State field allows up to 20 characters to accommodate international addresses.

   c. Review the information in the STUDENT CONTACT METHODS panel to ensure that CALL, EMAIL and/or TEXT are checked, based on the method(s) by which the student wishes to be contacted.

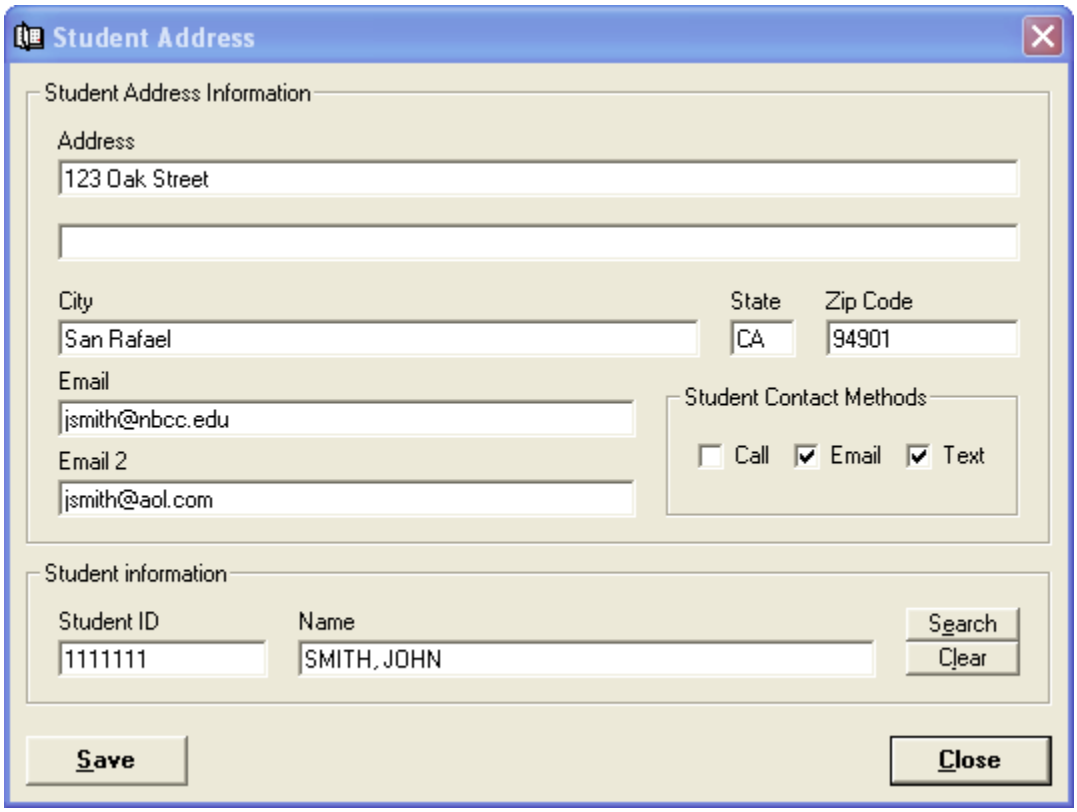
   d. Click on CLOSE. If changes have been made in any of the fields, a confirmation message will be displayed.

   e. Click on YES.

-or-

2. From anywhere on MY GRID, right click to display the COMMAND MENU.

a. Left-click on ADDRESS INFO. A STUDENT ADDRESS screen will be displayed. Here is an example:



b. View the information; then click on CLOSE.

-or-

c. Enter the desired information, then click on SAVE.

31.2 From an Un-booked Row on MY GRID

1. Right-click to display the COMMAND MENU.

2. Left-click on ADDRESS INFO to display the STUDENT ADDRESS screen.

3. Select one of the options below to enter the student's identifier.

   a. Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   b. If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

   c. If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 19.2.

d. If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

Note
The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

4. View the information; then click on CLOSE.

-or-

5. Enter the desired information, then click on SAVE.

SECTION 32 -- ADDITIONAL DAILY STUDENT CONTACTS

32.0 Overview

In addition to scheduled appointments and drop-in visits, advisors may have additional contacts with students throughout each day. These are not scheduled contacts in that the student's ID and name are not recorded in the system. These contacts may involve a telephone call or a brief encounter in or out of the office.

Two methods are available for recording additional contacts. They are discussed in the following sections:

32.1 Tally Student Contacts

32.2 Record Student-Specific Additional Contacts

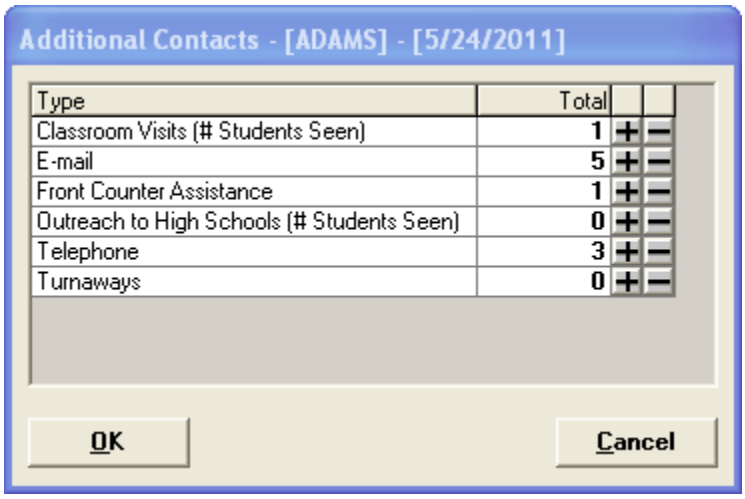
32.1 Tally Student Contacts

The Additional Contacts screen allows a tally of those contacts to be captured.

1. Select the date for which additional contacts are to be recorded.

2. Right-click to display the COMMAND MENU.

3. Left-click on CONTACTS to display the screen for recording additional contacts. Here is an example:



4. The Plus and Minus signs serve as counters. Click on + to add a contact on the line containing the type of contact, or click on – to remove a contact. The number in the TOTAL field will change accordingly.

5. Click on OK to save your updated information and return to MY GRID.

Any student contacts added in this manner will be listed on the "Appointment Attendance Summary Report" and the "Short Name History Report". (See Part VI, Sections 37.1.1 and 37.9.1)

32.2 Record Student-Specific Additional Contacts

This discussion is intended for schools that have chosen to establish a special Schedule Code to be used for recording student contacts on the Roster. This method creates a record of student-specific contacts rather than a simply tally.

First, a schedule code must have been created and included in the users' Master Schedules. An example would be EXTRA. Typically, the EXTRA Schedule Code would be placed in the last row of the Master Schedule so that it does not interfere with other daily activities.

In order for a user to record this type of Additional Contact, follow the steps below.

1. From MY GRID, double-click on the special Schedule Code (e.g., EXTRA) on the day in which the contact occurred. The Student Appointment screen will be displayed.

2. Proceed to add the student to the appointment screen, as if you were booking the student into a group appointment. (See "Schedule an Appointment" in this Part, Section 34.2)

Any student contacts added in this manner will be listed on the ROSTER. (See "View and Print the Roster" in Part III, Section 13.1)

SECTION 33 — APPOINTMENT ATTENDANCE

33.0 Overview

The Appointment Attendance feature serves two major purposes:

- To gather statistics on attendance status that may be important for internal and external reporting.
- To notify an advisor that a student has arrived for a scheduled appointment. This feature is available only if the automatic notification feature has been enabled and the default appointment attendance status is unmarked. Additionally, the clock on the PC being used to mark attendance must be accurate in order for advisors to receive their notifications.

The functioning of the Student Attendance feature is dependent on the initial setting for each appointment-allowable Schedule Code. If the school has chosen to mark all students automatically as having attended their appointments, non-attendance must be changed to NO manually. Conversely, if the school has chosen to mark all students automatically as having not attended their appointments, attendance must be changed to YES manually. The recommended method, NOT MARKED, requires that each student's attendance be recorded manually.

SARS·GRID offers three methods for recording appointment attendance. Two of the methods involve recording appointment attendance for an individual appointment. You may record the attendance for one student at a time, or for several students in one step by using QUICK DAY ATTEND. The third method involves recording appointment attendance for a group appointment. These methods are discussed in the following sections:

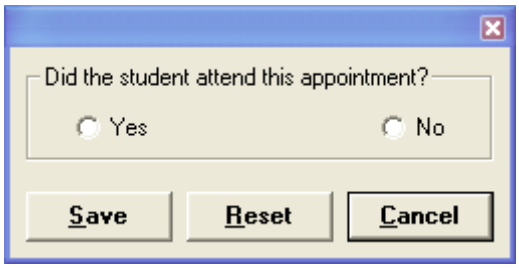
33.1 Record Attendance for One Student at a Time

If this icon ☑ appears in the ATTENDED column on the row on MY GRID that displays a student's name, attendance has already been marked for that appointment. The status of the appointment attendance is displayed as follows:

- If the column is blank, the attendance has not been marked.
- If the column contains this icon ☑, the attendance has been marked as "Attended."
- If the column contains this icon ☒, the attendance has been marked as "No Show."

1. On MY GRID, double-click on the row that contains the student's name. This will display the STUDENT APPOINTMENT screen.

2. Click on ATTENDED. The following screen will appear:



3. Record or correct attendance status by clicking on YES or NO.

4. Click on SAVE.

5. Click on CLOSE to return to MY GRID.

Note
If the attendance status was marked inadvertently, click on RESET to restore the attendance status to UNMARKED.

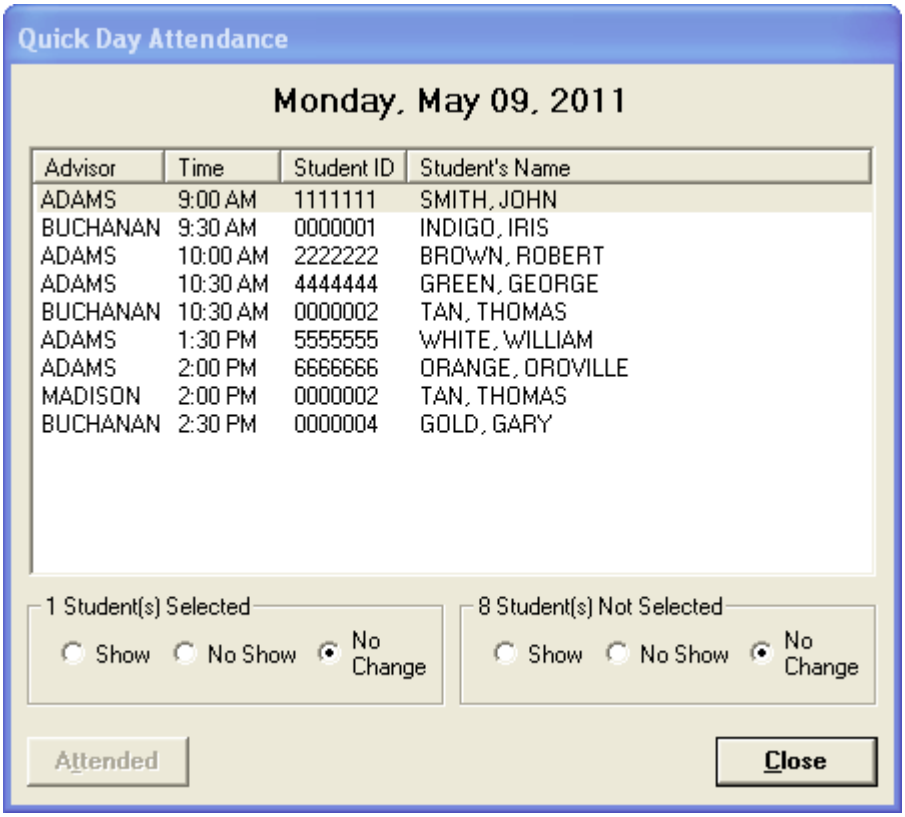
33.2 Record Attendance for Several Students in One Step

An advisor may record attendance for all individual appointments on a single date. If an icon appears in the Attended column (indicated by a ☑ in the header) for the row on MY GRID that displays a student's name, attendance has already been marked for that appointment.

1. On MY GRID, go to the desired date.

2. Right-click to display the COMMAND MENU.

3. Left-click on QUICK DAY ATTEND to display all of the advisor's appointments scheduled for that day for which attendance has not yet been marked as YES or NO. Here is an example of the screen layout.



The options are:

- # STUDENT(S) SELECTED: Use to mark the attendance status of all students on the list whose names have been highlighted.

  SHOW: Use to mark that the selected student(s) attended the appointment(s).

  NO SHOW: Use to mark that the selected student(s) did not attend the appointment(s).

  NO CHANGE: [the screen will default to this option] Use to leave the attendance unmarked.

- # STUDENT(S) NOT SELECTED: Use to mark the attendance status of all students on the list whose names have not been highlighted.

  SHOW: Use to mark that the de-selected student(s) attended the appointment(s).

  NO SHOW: Use to mark that the de-selected student(s) did not attend the appointment(s).

  NO CHANGE: [The screen will default to this option.] Use to leave the attendance unmarked.

- ATTENDED: Use to mark student attendance after the options have been selected. [This option is disabled until at least one row has been highlighted.]

- CLOSE: Use to exit the screen.

Note
If there are no unmarked appointments, the following message will appear, *The attendance for all appointments has already been marked.* Click on OK.

4. If one or more entries are listed, highlight either all of the entries for the students who attended or for the students who did not attend the appointment.

Tips
To highlight one or more names, hold down the control key while clicking on the names.

Highlight the fewer number of students. (For example, if 48 out of 50 students attended, highlight only the names of the two students who did not attend.)

   a. Click on the appropriate option (SHOW, NO SHOW, or NO CHANGE) for the group of selected names.

   b. Click on the appropriate option (SHOW, NO SHOW, or NO CHANGE) for the group of names that are not selected. The ATTENDED button will be enabled.

5. Click on ATTENDED. When finished, a confirmation message will be displayed.

6. Click on OK.

33.3 Record Attendance for a Group Appointment

The Student Attendance feature is available via MY GRID to users who have been assigned the access rights to MY GRID – ACCESS and MY GRID – SCHEDULE APPOINTMENTS.

The functioning of the Student Attendance feature is dependent on the initial setting for student attendance established by your school. If the school has chosen to mark all students automatically as having attended their appointments, non-attendance must be changed to NO manually. Conversely, if the school has chosen to mark all students automatically as having not attended their appointments, attendance must be changed to YES manually. The recommended method, NOT MARKED, requires that each student's attendance be recorded manually. To manually record or change attendance of students at group appointments, perform the following steps:

1. On MY GRID, double-click on the row that contains the group appointment. (If the appointment is at capacity, the ROSTER will be displayed immediately. Skip to step 4.) If the appointment is not full, the STUDENT APPOINTMENT screen will be displayed.

2. Click on MORE>>.

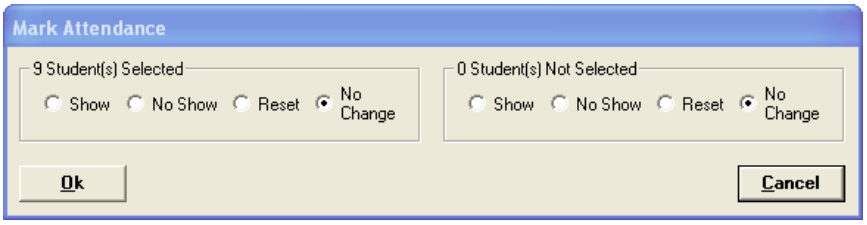
3. Click on ROSTER.

4. Highlight either all of the entries for the students who attended or for the students who did not attend the appointment.

Tips
To highlight more than one non-consecutive entry, hold down the control key while clicking on each name. To highlight consecutive entries, use the Shift key and then click on the first name and then on the last name to be included.

Highlight the fewer number of students. (For example, if 48 out of 50 students attended, highlight only the names of the two students who did not attend.)

5. Click on ATTENDED. A screen will appear that looks like this.



   a. Click on the appropriate option (SHOW, NO SHOW, RESET or NO CHANGE) for the group of selected names.

   b. Click on the appropriate option (SHOW, NO SHOW, RESET or NO CHANGE) for the group of names that are not selected.

6. Click on OK. When finished, a confirmation message will be displayed.

7. Click on OK and then on CLOSE to return to MY GRID.

Tip To change the attendance status for just one student, select the attendance status for that individual. Leave the rest of the students as No Change. Click on OK.

SECTION 34 — SCHEDULING FUNCTIONS

34.0 Overview

The Student Appointment Screen and the Roster are discussed in Sections 13 and 14 in Part III.

This Section guides schedulers in performing a variety of routine scheduling tasks using MY GRID. The list that follows is a table of contents for Section 34.

Note about Terminology
Throughout these chapters, the word ADVISOR is used generically to describe any person who may have appointments and/or drop-in visits with students and has a Master Schedule in SARS·GRID. The System Administrator may establish a Short Name Label for each Location to more correctly identify the type of individual (e.g., Counselor, Tutor, Nurse, etc.).

Note for Persons with Disabilities
SARS·GRID contains accessibility features for the visually and manually impaired. For information on configuring these features, see Appendix C. If the text-to-speech component is used in Professional mode, we recommend that users temporarily turn off third-party text-to-speech components. To ensure privacy of information, we also recommend that earphones be used when the text-to-speech function is activated on a computer that is located in a public area.

34.1 Schedule an Appointment

An individual appointment is any scheduled activity that is attended by a single student. A group appointment is any scheduled activity that may be attended by more than one individual. Examples of group appointments are orientation sessions and testing sessions.

To schedule an appointment the following minimum information is needed: the student's identifier and first and last name. If a student cannot remember the name of the advisor with whom previous appointments were scheduled, use STUDENT HISTORY to obtain that information.

1. On the SARS·MENU, click on MY GRID.

2. Review the DATA VIEW selection, which defaults to Current Data View. If necessary, click on Future to access a date that occurs after the last date in the Current Data View, or click on History to access a date that occurs before the first date in the Current Data View.

3. Review the DISPLAY MODE selection. To view one advisor's schedule for multiple dates, click on BY ADVISOR ▼ and select the individual's name. To view multiple advisors' schedules for a given date, click on BY DATE ▼ and select the desired date.

   Tip
   If it is necessary to find a date in Future Data View while in DISPLAY MODE BY ADVISOR, use the jump button or the >> next page or << previous page features to move quickly to dates that are not shown on MY GRID.

4. To view only those individuals associated with a particular specialty, click SPECIALTY ▼ and then on the desired option.

5. Double-click anywhere in the row containing the available appointment (individual or group) to display the STUDENT APPOINTMENT screen.

   Tips
   If time increments of less than 30 minutes are being used, the desired appointment time slot may not be visible on the screen. If the SPLIT THE GRID IN HALF option has been activated, use **F10** to toggle between two halves of MY GRID to find the appointment time slot. If the SPLIT THE GRID IN HALF option has not been activated, scroll until the desired time slot comes into view.

   If booking a student into a group appointment, first check to see if the appointment is full by resting the cursor on the group appointment cell. If spaces are available, a tool tip will indicate the number of spaces remaining, and also the Reason Codes(s) for the appointment (if that additional option has been selected for the tooltip setting for the Location). If the appointment is full, a red tool tip will state, "Spaces Remaining: 0" and the ROSTER will appear immediately after double-clicking on the row containing the group appointment. To accommodate a different number of students for this group appointment, use the Change feature on the ROSTER. (See "Change the Maximum Number of Students Allowed for a Group Appointment" in Part III, Section 14.2. Then return to the target time slot on MY GRID and resume scheduling the appointment.)

6. Complete the following information on the STUDENT APPOINTMENT screen, using either the ENTER or the TAB key to move from field to field. The first two steps are required; the remaining steps are optional.

a. Select one of the options below to enter the student's identifier.

- Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

- If the student's ID format is different from that provided in the ID field, press **F9**. The field will change to accept another format. Repeat until the desired ID format is displayed. Then type the student's identifier.

- If the student's identifier is not known, see "Search for a Student's Identifier When Making an Appointment" in this Part, Section 34.2.

- If the individual does not have an identifier, press **F9** until the ID format that has been established for a Guest ID is displayed. Then press **F7**. This action will automatically generate a temporary identifier with **SG** as the leading characters. (The next time **F7** is pressed while in the ID field for another student, the next sequentially available SG number will be assigned.)

Note
The selected format will remain active on the same PC unless (i) it is changed back to another format using the **F9** key, (ii) it reverts automatically to the primary ID format after entering the alternate ID of a student who also has a primary ID in the system, or (iii) the user starts a new session.

Notes
If the appointment for this student will conflict with a pending appointment in any Location, a warning screen will be displayed. If users have GRID - ACCESS or VIEW STUDENT HISTORY permissions, they will be able to see the actual Location and Short Name for the conflicting appointment. In order to preserve student confidentiality, other users will see an asterisk (*) with the following message: "Details about the Location and Short Name are not available based on your permission level." Click on YES to proceed anyway, or click on NO to abort the appointment and find another time slot.

If the maximum number of appointments that a student is allowed to have for this Location would be exceeded by booking this appointment, a warning screen will be displayed notifying the schedulers that this appointment would cause the total number of appointments for this student to be exceeded. Click on YES if you want to override the Maximum Concurrent Appointments restriction.

Notes
(1) If a student previously scheduled an appointment or if information about a student is stored in a school maintained database to which SARS·GRID has access, Name, and possibly Birth Date, Home and/or Contact Phone (if this information is in the database) will appear automatically after typing the identifier. However, the information must be stored in the database under the ID format that is being used.

(2) If USE STUDENT CLASSES has been activated in SARS·UTIL, a Course Selection screen will be displayed after the student's ID is entered. The screen will list all the classes in which the student is enrolled. To add those classes to the Reason Codes list:

(i) Click on one or more classes to be included as Reason Codes.
(ii) Click on SELECT.

The selected courses will be placed at the top of the Reason Code list and will be available for selection as reasons for the appointment.

(3) If USE SHORT NAME ASSIGNMENTS has been activated on the Miscellaneous Settings screen in SARS·UTIL (see Section 4.5 in Part I) and the appointment is being made with an advisor other than the advisor to whom the student has been assigned, a confirmation message will be displayed. A warning/confirmation message will be displayed. To proceed to make the appointment with the unassigned individual, click on YES. Otherwise, click on NO and return to MY GRID and make the appointment with the assigned individual.

b. Type the student's LAST NAME, FIRST NAME in NAME (for example, SMITH, JOHN). The last name first method will render reports sorted by student names more usable.

c. Type the student's birth date in BIRTH DATE. (Birth year will accept 2 or 4 digits. The century defaults to 20 for years 00 to 29. The century defaults to 19 for years 30 to 99. To override the default, you must enter the 4-digit date.)

d. Type the student's permanent telephone number in HOME PHONE and any extension in EXTENSION.

e. Type the student's contact telephone number in CONTACT PHONE and any extension in EXTENSION.

f. Type the student's text phone number in TEXT PHONE, if the student has a cell phone with text messaging capabilities.

Note
The text option will be usable only if the college has a valid license for text messaging.

g. Click on the icon adjacent to ADDRESS INFORMATION and then type the student's street address, city, state, zip code, and e-mail address(es).

h. Review the information In the STUDENT CONTACT METHODS panel to ensure that CALL, EMAIL and/or TEXT are checked, based on the method(s) by which the student wishes to be contacted. If the email option is disabled, the student does not have an email address listed. If the Text option is disabled, either the student does not have a text phone number listed or the college does not have a valid license for text messaging.

i. Click on the selected options in the REASON CODE field. (Use the scroll bar if the list extends beyond the viewable screen.) A tool tip showing a description of the Reason Code will be displayed if the cursor is positioned over a Reason Code.

Notes
Click on + to display a screen showing all Reason Codes at a glance and to select one or more codes from that screen.

If you wish to generate statistical reports on the reasons why students request appointments, you must select one or more Reason Codes. Some systems may be set to require a Reason Code, and some systems may be set to Allow Multiple Reason Codes, and/or (for group appointments) clear reasons after each booking is completed.

j. Enter specific information about the reason for making the appointment in the COMMENTS field. The field will accept up to 255 characters.

Tip
Right click on the selected Reason Code to enter its corresponding full description in the Comments field.

k. Enter or edit the room number for this appointment if it differs from that which is displayed. If this is a group appointment and the room number field is blank or needs to be changed, click on ROSTER, enter the room number, and then return to the STUDENT APPOINTMENT screen.

l. To send an email receipt for the appointment, check the EMAIL RECEIPT option. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

m. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

n. Ensure that TEXT RECEIPT is checked to indicate that a confirmation of the appointment should be sent to the student via text messaging. If this field is enabled, and *Text Receipt* is checked, a text message will be sent to the student when an appointment is booked, moved or copied. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

o. If PULL FILE is checked, the appointment will be listed on the “All Appointments for a Day Report” as requiring files to be pulled. Check or uncheck the box as appropriate.

p. For additional options, click on MORE>>.

Note
If the student information is already stored in the database, the ADDITIONAL INFO, ALERT and STUDENT HISTORY options will be enabled. Otherwise, these options will only be made available after an appointment is committed. The availability of the ADDITIONAL INFO option is also dependent upon whether the system administrator has set it up for this Location.

q. If the ADDITIONAL INFO button is enabled, the user may view information about the student, and if permitted, also enter or change information about a student. Click on ADDITIONAL INFO to display the ADDITIONAL INFORMATION screen. Review or record the student’s response to each question. Each question allows for a date, list, text or yes/no response. Click on SAVE to save new or changed information; click on CLOSE to exit without saving. (Also see “View or Record Additional Information” in this Part, Section 23.)

r. Any existing alerts about that student will pop up on your screen after the student's ID is entered. Any Early Alerts created in the SARS·ALRT application will pop up first, followed by any SARS·GRID alerts. If an Early Alert is displayed, click on TRANSFER REASONS to include those reasons in the student’s appointment. (Also see "View or Record an Alert" in this Part, Section 22.)

Note
Users may view alerts for all Locations to which they have been assigned.

s. To link the topic of the current visit to a different term, as opposed to the current term (e.g., discussion of an Ed Plan for the next semester), click TERM ▼ and select the desired Term.

t. Review the INFO FLAGS panel to see whether the student has completed key actions toward matriculation goals.

7. Click on COMMIT APPOINTMENT. A COMMIT CONFIRMATION screen will appear if your school has chosen to use this option.

Note
If you inadvertently click on CLOSE rather than on COMMIT APPOINTMENT, the appointment information will not be discarded unless you confirm that you want to discard the appointment information.

a. To proceed with the action, click on YES. Otherwise, click on NO and advise the student of the conflicting appointment.

b. [If initials are required] Enter your name or initials.

For an individual appointment, the booked appointment Schedule Code will appear in the selected cell on MY GRID. For a group appointment, the Schedule Code that allows for a group appointment remains in the cell on MY GRID and the appointment record for the student is added to the Roster. For both types of appointments, the appointment record for the student will be added to STUDENT HISTORY.

8. For a group appointment, repeat steps 6 and 7 to book other students in the same scheduling session. When done, click on CLOSE.

Tips
To extend or unextend an appointment, see “Extend and Unextend an Appointment Slot” in Section 34.4, in this Part.

If you did not print a receipt before committing an appointment, double-click on the scheduled appointment time slot. The STUDENT APPOINTMENT screen will be displayed. Click on MORE>>. For an individual appointment, click on REPRINT RECEIPT. For a group appointment, first click on ROSTER, click on the student’s name, and then click on REPRINT RECEIPT.

Note
[For individual appointments] From time to time, “Reserv” may be displayed in a time slot. “Reserv” normally indicates that the appointment is no longer available because it is in the process of being scheduled by another user. Once the appointment is committed, “Reserv” is replaced with the booked appointment schedule code. If the scheduling action does not complete, “Reserv” will continue to be displayed in the time slot. In this instance, click on REFRESH. If the time slot does not change, use the QUICK DAY CHANGE screen to reset it to its original appointment. Click on the slot on the QUICK DAY CHANGE screen that displays “Reserv.” You will be asked whether you want to re-set the appointment. Click on YES.

More Information

An occasional Saturday (or Sunday) may be added to MY GRID and made available for scheduling. (See “Add an Occasional Saturday or Sunday” in Part 1, Section 5.6.3.)

34.2 Search for a Student's Identifier When Making an Appointment

If the student does not know his/her ID, or provides an incorrect identifier, or the scheduler enters an incorrect ID, follow the steps below. This function allows the scheduler to find a database match for the student's name and the identifier if the student previously scheduled an appointment or if student data from an external source has been loaded in the database being used.

1. On MY GRID, double-click anywhere in the row containing the available appointment ~~cell~~ to display the STUDENT APPOINTMENT screen.

2. If the student's ID is not known, type the student's name or a portion thereof in NAME and click on SEARCH.

   a. If matches are not found, a notification message will be displayed.

   b. If only one match is found, the student's ID and, if existing, BIRTH DATE, HOME PHONE, and CONTACT PHONE will be displayed.

   c. If more than one match is found, a list of all students with that name will appear (on the SEARCH RESULTS screen).

      i) Click on the name from the list.

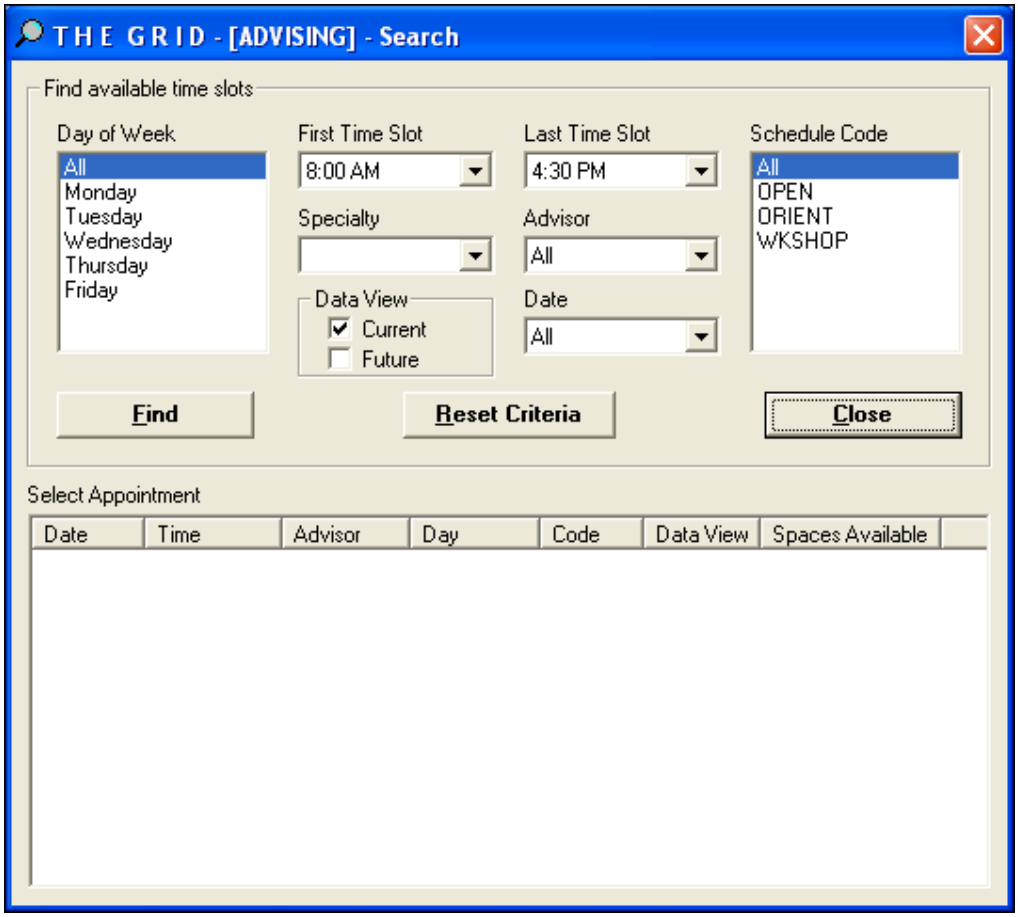
      ii) Click on OK. Information about that student will be displayed in ID and NAME and possibly BIRTH DATE, HOME PHONE, and CONTACT PHONE if this information is in the database.

3. The cursor is positioned in the REASON CODE field. Proceed with entering information to make an appointment.

34.3 Search for an Available Appointment Slot

1. From MY GRID, right-click to display the COMMAND MENU.

2. Click on SEARCH FOR APPOINTMENT. A screen will appear that looks like this:



3. Click on one or more days, or on ALL, in DAY OF WEEK.

   -or-

   Click on DATE ▼ and select the specific date that the student requests.

4. Click on FIRST TIME SLOT ▼ and select the earliest time slot that the student wishes an appointment to begin.

5. Click on LAST TIME SLOT ▼ and select the latest time slot that the student requests an appointment to begin.

6. [Optional] Click on SPECIALTY ▼ and select the desired specialty group (e.g., Spanish-speaking) to limit the choices to that group.

7. Click on ADVISOR ▼ and select the desired advisor.

8. In the DATA VIEW panel, click on CURRENT to search for appointments in the Current Date View or click on FUTURE to search for appointments in the future Data View, or click on both to expand the search.

Note
Selecting both CURRENT and FUTURE will display all available appointments in the CURRENT DATA VIEW plus up to 100 additional appointment slots in the FUTURE DATA VIEW.

9. Click on one or more Schedule Codes, or on ALL, in the SCHEDULES CODES field to search for the desired appointment allowable slots. If the Schedule Code is for an individual appointment, only available slots will be displayed.

10. Click on FIND to display a list of available appointments that will satisfy the selection criteria.

11. Double-click on the selected entry from among those listed. The STUDENT APPOINTMENT screen will appear.

12. Enter the applicable information on the STUDENT APPOINTMENT screen. Click on COMMIT APPOINTMENT. Type your name or initials in response to the prompt and then press ENTER or click on YES to return to the SEARCH screen.

13. Click on CLOSE to exit the SEARCH screen, or click on RESET CRITERIA to clear the screen and select other criteria.

34.4 Extend and Un-extend an Appointment

Some group appointment Schedule Codes (e.g., WORKSHOP) may have varying durations. When setting up the system, it was recommended that such Schedule Codes be assigned the shortest likely duration, because the specific activity may later be extended. There are 3 methods for extending the length of an appointment when the row(s) below are appointment allowable.

The first method is preferred when booking an individual appointment. The second and third methods are recommended only if the appointment has already been booked and the scheduler is returning to the appointment to extend it after the fact and for group appointments.

34.4.1 Extend

1. [For individual appointments] On the STUDENT APPOINTMENT screen:

   a. Click on MORE>> to display the right-hand side of the screen.

   b. Click on EXTEND.

   c. Repeat as necessary.

Tip
If the option has been selected to print both the start and stop time of the appointment, extend the appointment before committing it so that the entire appointment duration is printed on the receipt.

2. On MY GRID:

a. Left-click to place the focus on the row that contains the scheduled appointment.

b. Right-click to display the COMMAND MENU.

c. Left-click on EXTEND APPOINTMENT.

d. Repeat as necessary.

3. On MY GRID after booking the appointment:

a. Left-click on the row that contains the scheduled appointment.

b. Press **Alt+E**.

c. Repeat as necessary.

Remember to reprint the receipt if the computer has been configured to display both appointment start and end times on receipts.)

34.4.2 Un-extend

An extended appointment may be shortened one row at a time using one of the following three methods:

1. For an individual appointment, use the STUDENT APPOINTMENT screen. Click on MORE>> to display the right-hand side of the screen. Then click on UNEXTEND. Repeat as needed.

   -or-

2. On MY GRID, left-click to place the focus on any row within the scheduled individual or group appointment. Then right-click to display the COMMAND MENU. Then left-click on UNEXTEND. Repeat as needed.

   -or-

3. On MY GRID, left-click to place the focus on any row within the scheduled individual or group appointment. Press **Alt+U** to unextend the appointment one row. Repeat as needed.

Depending upon the option selected by your school, either the Schedule Code that previously resided in the time slot on MY GRID will be returned, or the Replacement Code will be inserted in the time slot.

34.5 Move a Scheduled Appointment

A student may be moved from one group appointment to another, from one group appointment to an individual appointment, or from an individual appointment to a group activity. Individual appointments may be moved to another appointment slot for the same Location or a different Location. However, when moving an appointment to a different Location, the associated Reason Codes will not be moved with it.

34.5.1 Move from an Individual Appointment

1. On MY GRID, left-click on the row that contains the scheduled appointment.

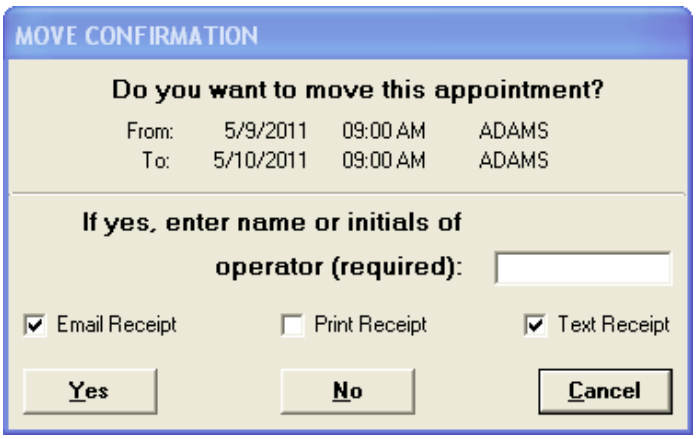
Tip
Rest the cursor over the booked appointment. The tool tip will display the student's name, the student's identifier, the Reason Codes(s) for the appointment, or some combination of the above, depending on the tooltip setting established for the Location.

2. Right-click to display the COMMAND MENU.

3. Left-click on MOVE APPOINTMENT. The cursor will change to display the word "Move."

Tip
Right click to cancel the move action. Click on YES in response to the message, "Appointment move in process. Do you want to cancel the move?" The original appointment will be retained.

4. Double-click on the row to which the appointment is to be moved. A MOVE CONFIRMATION screen will be displayed. Here is an example:



a. [If initials are required] Enter your name or initials.

b. To send an email receipt for the appointment, click on EMAIL RECEIPT. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

d. To send a text message for the appointment, click on TEXT RECEIPT. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

e. Click on YES.

34.5.2 Move from a Group Appointment

1. On MY GRID, double-click on the row containing the group appointment to display the STUDENT APPOINTMENT screen. (If the appointment is at capacity, the ROSTER will appear immediately. Skip to step 3.)

Tip
Rest the cursor over the group appointment cell. If spaces are available, a tool tip will display the number of spaces remaining and the Reason Codes(s) for the appointment (if that additional option has been selected for the tooltip setting for the Location.

2. Click on MORE>>; then click on ROSTER. The students who are scheduled for the appointment will be listed alphabetically by last name.

3. Click on the student for whom the appointment is being moved.

4. Click on MOVE. MY GRID will be displayed, and the cursor will change to display the word "Move".

5. Double-click on the row to receive the student.

6. When the MOVE CONFIRMATION screen appears,

   a. [If initials are required] Enter your name or initials.

   b. To send an email receipt for the appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

   c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

   d. To send a text message for the appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

   e. Click on YES. The appointment will be moved to the new time slot on MY GRID. Depending upon the option selected by your college, either the former Schedule Code or the Replacement Code will be inserted in the time slot that previously contained the scheduled appointment.

Note
From time to time, "Moving" may be displayed in a time slot. "Moving" indicates that the appointment is in the process of being moved from one slot to another. If the action does not complete, "Moving" will continue to be displayed in the original time slot. In this instance, click on REFRESH. If the row does not change, use the QUICK DAY CHANGE screen to reset the row to its original appointment. Click on the row on the QUICK DAY CHANGE screen that displays "Moving." You will be asked whether you want to reset the appointment. Click on YES.

34.6 Move a Group Appointment to another Time Slot

A group appointment Schedule Code and all of the appointments booked for that activity may be moved in their entirety to another date and/or time. This option is available only if at least one student is already booked for this activity. A group appointment may also be moved to a different Location; however, the associated Reason Codes will not be moved with it to the new Location. To move a student from a group activity, see "Move a Scheduled Appointment" in Section 34.5.2 above.

1. On MY GRID, left-click on the row that contains the group activity.

2. Right-click to display the COMMAND MENU.

3. Left-click on MOVE APPOINTMENT. The cursor will change to display the word "Move."

Tip
To cancel the move action, right click. Click on YES in response to the message, "Appointment move in process. Do you want to cancel the move?" The original appointment will be retained.

4. Double-click on the row to which the activity is to be moved.

5. When the MOVE CONFIRMATION screen appears,

   a. [If initials are required] Type your name or initials.

   b. Ensure that EMAIL RECEIPT is checked if you want to send email confirmations of this moved group appointment to each student on the roster who has an email address and has opted to receive email confirmations.

   c. Ensure that PRINT RECEIPT is checked if you want to hand out or mail written confirmations.

   d. Ensure that TEXT RECEIPT is checked if you want to send text confirmations of this moved group appointment to each student on the roster who has a text phone and has opted to receive text confirmations. If the student does not have a text phone or the college does not have the text messaging software license, the TEXT option will be disabled.

   e. Click on YES. The activity will be moved to the new time slot on MY GRID. Depending upon the option selected by your college, either the former Schedule Code or the Replacement Code will be inserted in the time slot that previously contained the group activity.

Note
From time to time, "Moving" may be displayed in a time slot. "Moving" indicates that the activity is in the process of being moved from one time slot to another. If the action does not complete, "Moving" will continue to be displayed in the original slot. In this instance, click on REFRESH. If the time slot does not change, use QUICK DAY CHANGE to reset it to its original activity. Click on the time slot on the QUICK DAY CHANGE screen that displays "Moving." You will be asked whether you want to reset the group activity. Click on YES.

34.7 Copy a Student to another Time Slot

A student appointment may be copied to and from another individual or group appointment slot for the same or a different Location. However, when copying an appointment to a different Location, the associated Reason Codes will not be copied with it. The copy function retains the student in the original appointment.

34.7.1 Copy from an Individual Appointment

1. On MY GRID, left-click on the row that contains the scheduled appointment.

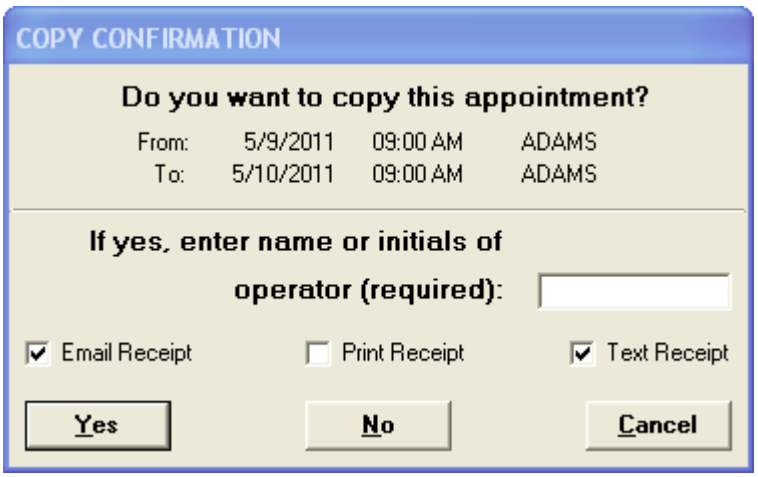
Tip
Rest the cursor over the booked appointment time slot. The tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tooltip setting established for the Location.

2. Right-click to display the COMMAND MENU.

3. Left-click on COPY APPOINTMENT. The cursor will change to display the word "Copy".

Tip
Right click to cancel the action. Click on YES in response to the message, "Appointment copy in process. Do you want to exit the copy function?" The original appointment will be retained.

4. Double-click on the appointment row to receive the student. (Either a group or individual appointment time slot may be selected.) A COPY CONFIRMATION screen will be displayed. Here is an example:



a. [If initials are required] Type your name or initials.

b. To send an email receipt for the new appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

c. To generate a paper receipt for the new appointment, check the PRINT RECEIPT option.

d. To send a text message for the new appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

e. Click on YES. The appointment will be copied to the new time slot on MY GRID or, in the case of a group appointment, the student will be added to the Roster.

5. To make more appointments for the same student, repeat steps 3 - 4. When done, right-click. A message will appear asking if you wish to cancel the copy process. Click on YES to return to MY GRID.

34.7.2 Copy from a Group Appointment

1. On MY GRID, double-click on the row containing the group appointment to display the STUDENT APPOINTMENT screen. (If the appointment is at capacity, the ROSTER will appear immediately. Skip to step 3.)

2. Click on MORE>>; then click on ROSTER. The students who are scheduled for the appointment will be listed alphabetically by last name.

3. Click on the student to be copied to another appointment.

4. Left-click on COPY. The cursor will change to display the word “Copy”.

Tip
Right click to cancel the action. Click on YES in response to the message, “Appointment copy in process. Do you want to exit the copy function?” The original appointment will be retained.

5. Double-click on the appointment row to receive the student. (Either a group or individual appointment time slot may be selected.)

6. When the COPY CONFIRMATION screen appears,

   a. [If initials are required] Enter your name or initials.

   b. To send an email receipt for the appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

   c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

   d. To send a text message for the appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

   e. Click on YES. The appointment will be copied to the new time slot on MY GRID or, in the case of a group appointment, the student will be added to the Roster.

7. To make more appointments for the same student, repeat steps 5 - 6. When done, right-click. A message will appear asking if you wish to cancel the copy process. Click on YES to return to MY GRID.

Note
From time to time, "Cpying" may be displayed in a time slot. "Cpying" indicates that the appointment is in the process of being copied to other time slots. If the action does not complete, "Cpying" will continue to be displayed in the original slot. In this instance, click on REFRESH. If the time slot does not change, use the QUICK DAY CHANGE screen to reset the slot to its original appointment. Click on the time slot on the QUICK DAY CHANGE screen that displays "Cpying." You will be asked whether you want to reset the appointment. Click on YES.

34.8 Copy a Group Appointment to another Group Time Slot

All students in a group appointment may be copied to another group appointment by using the Command Menu. The associated Reason Codes will be copied to the new Location. The copy function retains the students in the original group activity, as well. The target group appointment duration may differ from the duration of the source group appointment.

1. On MY GRID, right-click on the row containing the group appointment that is to be copied. The COMMAND MENU will be displayed.

2. Click on COPY APPOINTMENT.

   Tip
   To view more than one day at a time, click on MULTIPLE DATES.

3. Double-click on the group appointment slot that will be receiving the copied information. All students that were registered for the initial appointment, as well as the associated Reason Code(s), will be placed in the new group appointment slot, with the following exceptions:

   a. If a student name from the copied appointment already exists in the receiving appointment, it will not be copied.

   b. If the receiving appointment does not have enough slots remaining to accept all of the students being copied, a warning message will be displayed. In such a case, the maximum number of students allowed may be increased on the Roster.

4. To complete the Copy function, right-click on the appointment row that received the copied information. A confirmation message will be displayed.

   a. [If initials are required] Enter your name or initials.

   b. To send an email receipt for the appointment, ensure that EMAIL RECEIPT is checked. (If the student does not have an email address, the EMAIL RECEIPT option will be disabled.)

   c. To generate a paper receipt for the appointment, check the PRINT RECEIPT option.

   d. To send a text message for the appointment, ensure that TEXT RECEIPT is checked. (If the student does not have a text phone or the college does not have the text messaging software license, the TEXT RECEIPT option will be disabled.)

   e. Click on YES.

34.9 Send a Student to the Drop-in Screen

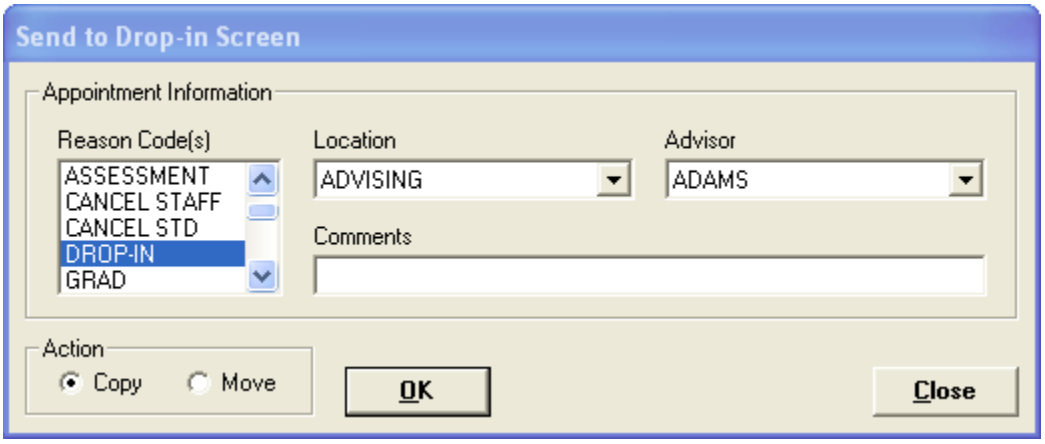
Users may either move students with a scheduled appointment to the Drop-in Screen for a drop-in visit or copy them to the Drop-in Screen. Moving a student will remove that name from MY GRID, whereas copying a student will retain the name on both the Drop-in Screen list and MY GRID.

1. On MY GRID, left-click on the row that contains the scheduled appointment.

Tip
Rest the cursor over the booked appointment time slot. The tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tooltip setting established for the Location.

2. For an individual appointment, right-click to display the COMMAND MENU. Then left-click on SEND TO DROP-IN SCREEN.

3. For a group appointment, from the Roster, click on the student name to be copied or moved. Then click on SEND TO DROP-IN SCREEN. Here is an example of the screen:



The options are:

- APPOINTMENT INFORMATION

REASON CODE(S):	Use to select the reason associated with the drop-in visit.
LOCATION:	Use to select the Drop-in Location.
ADVISOR:	Use to select the advisor to which the student should be referred, or select Next for the student to see the next available advisor.
COMMENTS:	Use to type in any relevant comments.

- ACTION

COPY:	Use to transfer a selected student from MY GRID to the Drop-in Screen for a drop-in visit while retaining the student's individual appointment.

MOVE: Use to transfer a selected student from MY GRID to the Drop-in Screen for a drop-in visit without retaining the student's individual appointment.

- OK: Use to approve the action.
- CLOSE: Use to exit the screen.

4. In the REASON CODE(S) field, click on the desired Reason Code.
5. Click on LOCATION ▼ and select the drop-in Location.
6. Click on ADVISOR ▼ and select either NEXT to have the student see the next available advisor, or click on the name of the advisor that the student should see.
7. Click on COMMENTS and type in any relevant comments.
8. To place the student on the Drop-in Screen while retaining that student's individual appointment on MY GRID, click on COPY. A confirmation message will be displayed.
   a. Click on YES to proceed, or
   b. Click on NO to cancel the action.
9. To send the student to the Drop-in Screen and also remove that student's appointment on MY GRID, click on MOVE. A confirmation message will be displayed.
   a. Click on YES to proceed, or
   b. Click on NO to return to the previous screen, or
   c. Click on CANCEL to cancel the action.

34.10 Send Email to a Student with a Booked Appointment

Sometimes it may be necessary for an advisor to send an email message to a student either before or after an appointment has occurred. This can be done easily from the booked appointment row on MY GRID, if the student has an email address in the system. If the student does not have an email address listed, the status icon in the Send Email column will not be displayed.

For a Student with an Individual Appointment:

1. Click on the row on MY GRID containing the student appointment. Be sure the focus is on that row.
2. Left-click on the email icon in the SEND EMAIL column. An email screen will be displayed and the student's email address will be displayed in the TO field.

Note
If the SEND EMAIL column is not displayed, press **F6** to display the Configuration screen and add the column to your screen.

a. Click on the SUBJECT field and type in an appropriate subject.

b. Click in the BODY field and type the message.

c. Click on SEND. The email screen will close and you will be returned to MY GRID.

For a Student in a Group Appointment:

1. From the Roster, click on the student's name. The EMAIL button will be enabled if the student has an e-mail address in the system.

2. Click on EMAIL to display an email screen.

   a. Click on the SUBJECT field and type in an appropriate subject.

   b. Click in the BODY field and type the message.

   c. Click on SEND. The email screen will close and you will be returned to the Roster.

34.11 Send Text Message to a Student with a Booked Appointment

For a Student with an Individual Appointment:

If Text Messaging is configured and the student has a text phone number in the system, the status icon in the Send Text column will be displayed.

1. Click on the row on MY GRID containing the student appointment. Be sure the focus is on that row.

2. Left-click on the text icon in the SEND TEXT column. A text message screen will be displayed.

   Note
   If the SEND TEXT column is not displayed, press **F6** to display the Configuration screen and add the column to your screen.

3. Type the desired message and then click on SEND**.** The screen will close and you will be returned to MY GRID.

For a Student in a Group Appointment:

1. From the Roster, click on the student's name. The TEXT button will be enabled if the student has a text phone number in the system.

2. Click on TEXT to display a Text screen.

   a. Click in the MESSAGE field and type the message.

   b. Click on SEND. The screen will close and you will be returned to the Roster.

34.12 Change Information about an Appointment

You may change all the information on the STUDENT APPOINTMENT screen except for the identifier. To change the student's ID, use the STUDENT MAINTENANCE screen in SARS·UTIL. (See "Modify Data about a Student, Including Changing an Identifier" in Part VII, Section 44.2.)

1. On MY GRID, double-click anywhere on the row that contains the scheduled appointment. The information that was previously entered for that appointment will be displayed on the STUDENT APPOINTMENT screen.

2. Change the information as desired.

3. Click on CLOSE. A confirmation message will be displayed.

4. Click on YES.

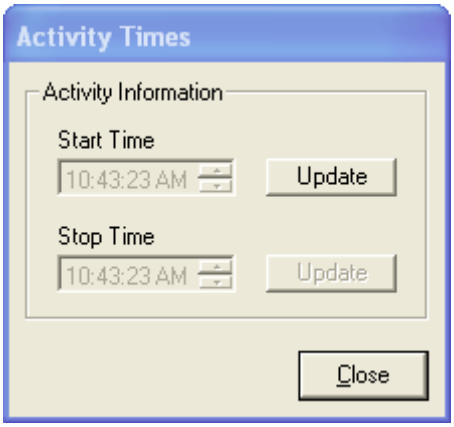
34.12.1 Set the Actual Start and Stop Times for Individual Booked Appointments

The actual start time and stop time of an individual appointment may be set after attendance for that appointment has been recorded as YES. To do this, open the STUDENT APPOINTMENT screen for that appointment.

1. If attendance for this appointment has not been marked, click on ATTENDED, then click on YES in response to the prompt "Did the student attend this appointment?" Then click on SAVE. If attendance is already marked, skip to step 2.

2. If the screen is not expanded, click on MORE >>.

3. Click on SET ACTIVITY TIMES. Here is an example of the screen:



The options are:

- START TIME: Used to display the time that the appointment started, which will be set when the advisor clicks on the adjacent Update button. (The Start Time may be adjusted only by the system administrator.)

- UPDATE: Use to set the Start Time when the appointment begins.

- STOP TIME: Used to display the time that the appointment ended, which will be set when the advisor clicks on the adjacent Update button. (The Stop Time may be adjusted only by the system administrator.).
- UPDATE: Use to set the Stop Time.
- CLOSE: Use to exit the screen.

4. When the student arrives in the advisor's office for the appointment, click on the UPDATE button adjacent to the START TIME field. This will set the Start Time and the Activity Times screen will be closed automatically.

5. At the end of the appointment, click on SET ACTIVITY TIMES again and then click on the UPDATE button adjacent to the STOP TIME field. This will set the Stop Time and the Activity Times screen will be closed automatically.

Note
Only a system administrator can adjust the Start and Stop Times by selecting or typing in a different start time, and then clicking on the adjacent UPDATE buttons.

34.13 Cancel an Appointment

If a student cannot remember the appointment date or time, click on STUDENT HISTORY. Enter the student's ID or name. Click on JUST APPOINTMENTS. Then double-click on the appointment to be canceled to display the STUDENT APPOINTMENT screen.

34.13.1 Individual Appointment

1. On MY GRID, double-click anywhere on the row that contains the scheduled appointment. The information that was previously entered for that appointment will be displayed on the STUDENT APPOINTMENT screen.

Tip
Rest the cursor over the booked appointment time slot. The tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tooltip setting established for the Location.

2. In the REASON CODE field, de-select the reasons for making the appointment.

3. Click on the reason for the cancellation. (Use the scroll bar if the list extends beyond the viewable screen.) A tool tip showing a description of the Reason Code will be displayed if the cursor is positioned over a Reason Code.

Note
To generate statistical reports on the reasons why students cancel appointments, one or more Reason Codes must be selected. Some systems may be set to require a Reason Code, and some systems may be set to Allow Multiple Reason Codes.

4. Click on CANCEL APPOINTMENT. A confirmation screen will be displayed.

   a. If your name or initials are required, type them in the space provided on the CANCELLATION CONFIRMATION screen, then press ENTER or click on YES.

-or-

b. If your name or initials are not required, you will be asked to confirm whether you want to cancel the appointment. Click on YES. The appointment will be cancelled, and a cancellation record for the student will be added to STUDENT HISTORY. Depending upon the option selected by your Location, either the Schedule Code that previously resided in that cell on THE GRID will be returned or the Replacement Code will be inserted in the cell.

Note
If an appointment is cancelled within five minutes of its initial booking, the user will be required to enter his or her User Name (not just initials) to confirm the cancellation. That User Name must match the User Name of the person whose sign-in was current at the time the appointment was booked.

Tip
If you make a mistake in canceling an appointment, immediately click on UNDO from MY GRID to restore the appointment. UNDO reverses the last appointment cancellation made on the same PC used to make the cancellation, but only during the immediate work session and only if the appointment slot is still available. If the appointment slot is not available, the name of the student will be displayed so that you can re-schedule that student in another available slot.

34.13.2 Group Appointment

1. On MY GRID, double-click anywhere in the row containing the group appointment. If the appointment has vacancies, the STUDENT APPOINTMENT screen will be displayed. If the appointment is at maximum capacity, the ROSTER will be displayed immediately, so skip to step 3.

   Tip
   Rest the cursor over the group appointment cell. If spaces are available, a tool tip will indicate the number of spaces remaining, and also the Reason Codes(s) for the appointment (if that additional option has been selected for the tooltip setting for the Location).

2. From the STUDENT APPOINTMENT screen, click on MORE>>; then click on ROSTER. The students who are scheduled for the appointment will be listed alphabetically by last name.

3. To cancel the appointment for one or more (but not all) students on the list:

   a. While pressing the Control key, click on each student for whom the appointment is being cancelled.

      Note
      To cancel all students on the Roster, highlight the first name, then while pressing the Control and Shift keys simultaneously, click on last name to be cancelled.

   b. In the REASON CODE field, de-select the reasons associated with the appointment.

   c. Click on the reason for the cancellation. (Use the scroll bar if the list extends beyond the viewable screen.)

   d. Click on CANCEL STUDENT(S). A confirmation screen will be displayed.

e. If your name or initials are required, type them in the space provided on the CANCELLATION CONFIRMATION screen, then press ENTER or click on YES.

-or-

f. If your name or initials are not required, you will be asked to confirm whether you want to cancel the appointment. Click on YES. The appointment will be cancelled, and a cancellation record for the student will be added to STUDENT HISTORY. The Schedule Code that allows for a group appointment will remain in the time slot on MY GRID, and the cancelled slot will become available for another student.

Note
If an appointment is cancelled within five minutes of its initial booking, the user will be required to enter his or her User Name (not just initials) to confirm the cancellation. That User Name must match the User Name of the person whose sign-in was current at the time the appointment was booked.

34.14 Make Recurring Appointments

A simple method exists for scheduling multiple, recurring appointments for one advisor at a time. Scheduling recurring appointments is useful for advisors or other staff who see students for appointments on a regular basis.

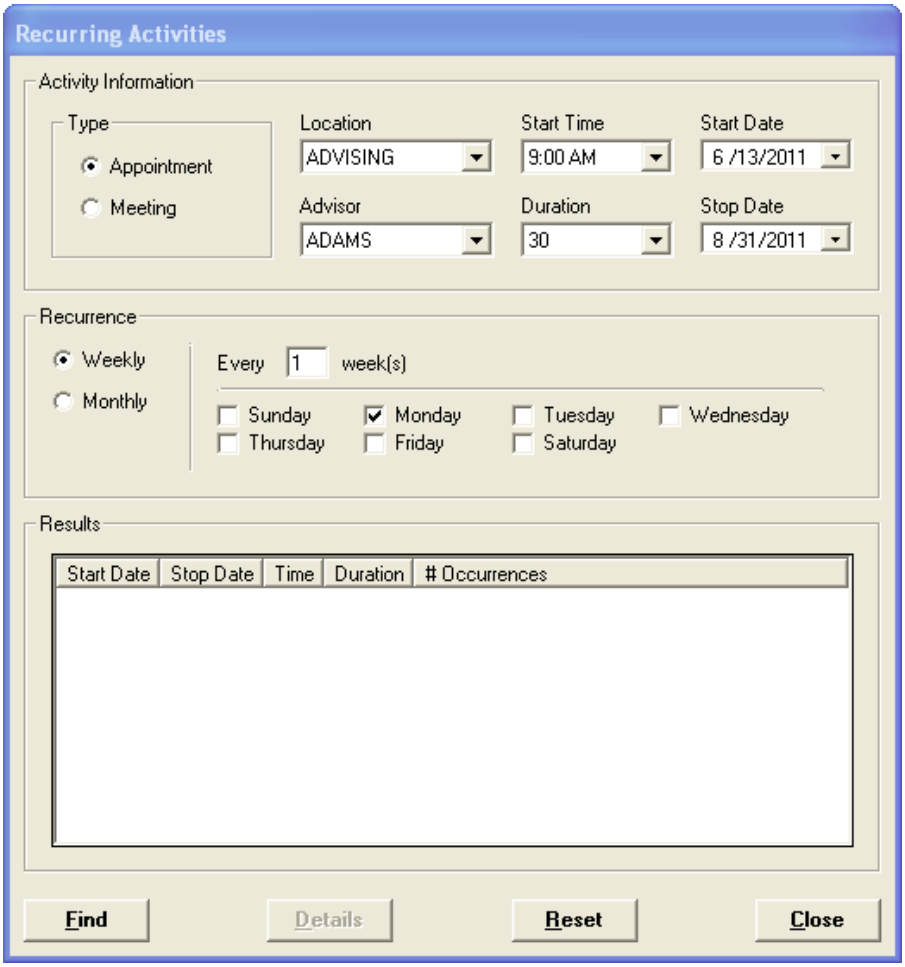
Two methods exist for scheduling recurring appointments:

- Using the RECURRING ACTIVITIES option.
- Using the COPY function (see Section 34.7, above).

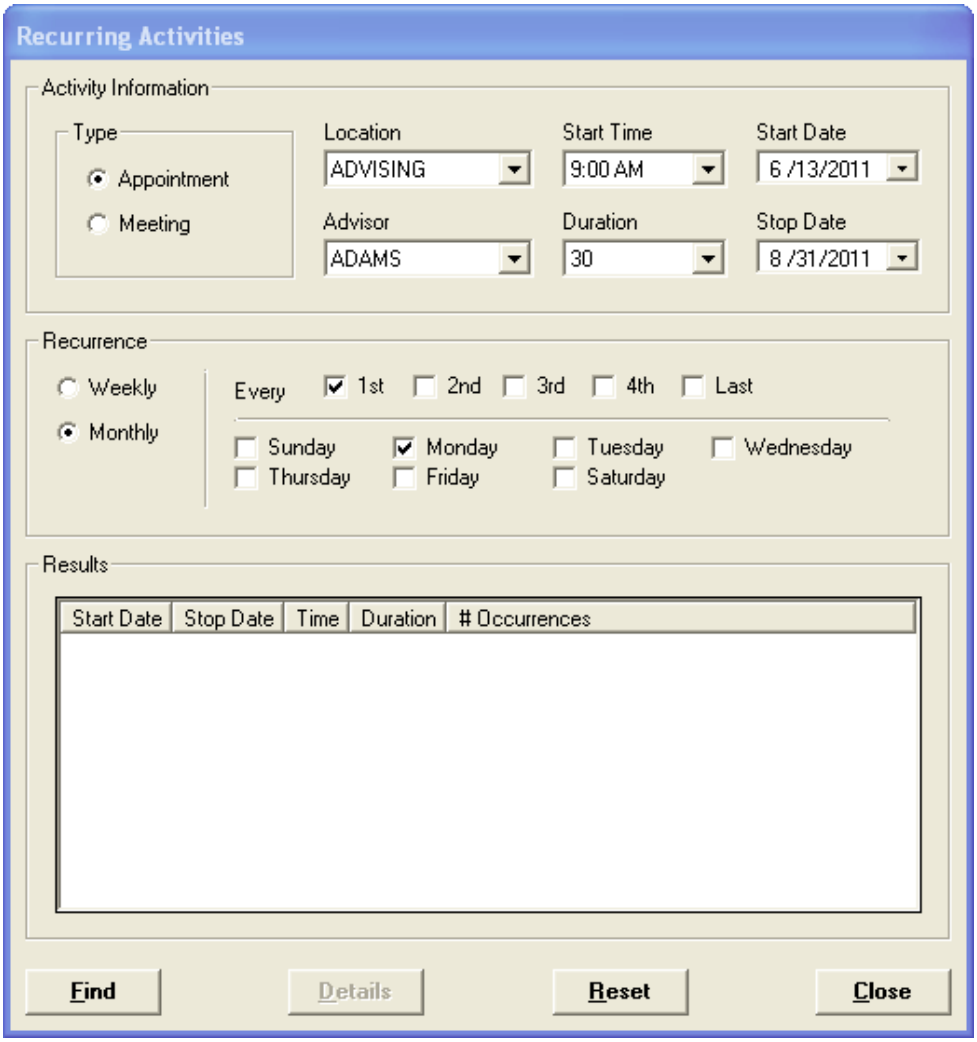
Both of these options are available from the COMMAND MENU on MY GRID.

1. From MY GRID, right click from any time slot to display the COMMAND MENU.

2. Click on RECURRING ACTIVITIES to display a RECURRING ACTIVITIES screen. Here is an example of the screen for Weekly Recurrences with Appointment selected:



Here is an example of the screen for Monthly Recurrences with Appointment selected:



The options are:

- ACTIVITY INFORMATION:

TYPE – APPOINTMENT:	Use to select the option to schedule a recurring appointment.
TYPE – MEETING:	Use to select the option to schedule a recurring meeting.
LOCATION:	Use to select the Location for which the advisor's schedule is associated.
ADVISOR:	Use to select the advisor for whom a recurring appointment or meeting is to be scheduled. This field label is dynamic, so the label may vary depending on the Short Name Label assigned to this Location.

START TIME: Use to select the time at which the recurring appointment or meeting will begin.

DURATION: Use to select the length of time needed for the recurring appointment or meeting.

START DATE: Use to select the earliest date for which the recurring appointment or meeting will be scheduled.

STOP DATE: Use to select the latest date for which the recurring appointment or meeting will be scheduled.

- RECURRENCE:

WEEKLY: Use to select the option to schedule a weekly appointment or meeting.

EVERY __ WEEK(S): Use with the WEEKLY option to select the frequency of the weekly appointment or meeting to be scheduled.

MONTHLY: Use to select the option to schedule a monthly appointment or meeting.

1st (occurrence): Use with the MONTHLY option to schedule the appointment or meeting on the first specified day of the month.

2nd (occurrence): Use with the MONTHLY option to schedule the appointment or meeting on the second specified day of the month.

3rd (occurrence): Use with the MONTHLY option to schedule the appointment or meeting on the third specified day of the month.

4th (occurrence): Use with the MONTHLY option to schedule the appointment or meeting on the fourth specified day of the month.

LAST (occurrence): Use with the MONTHLY option to schedule the appointment or meeting on the last specified day of the month.

SUNDAY: Use to schedule the appointment or meeting on a Sunday.

MONDAY: Use to schedule the appointment or meeting on a Monday.

TUESDAY: Use to schedule the appointment or meeting on a Tuesday.

WEDNESDAY:	Use to schedule the appointment or meeting on a Wednesday.
THURSDAY:	Use to schedule the appointment or meeting on a Thursday.
FRIDAY:	Use to schedule the appointment or meeting on a Friday.
SATURDAY:	Use to schedule the appointment or meeting on a Saturday.
• RESULTS:	Used to display those schedules that meet the selected criteria.
• FIND:	Use to display results for the selected criteria.
• DETAILS:	Use to display all details for a selected result.
• RESET:	Use to clear the RECURRENCE panel for new entries.
• CLOSE:	Use to exit the screen.

3. In the ACTIVITY INFORMATION panel,

   a. Click on APPOINTMENT.

   b. Click on LOCATION ▼ and select the location containing the advisor's schedule to be searched for eligible appointment dates.

   c. Click on ADVISOR ▼ and select the name of the advisor for whom the recurring appointments are to be scheduled.

   d. Click on START TIME ▼ and select the time at which the recurring appointment will begin.

   e. Click on DURATION ▼ and select the length of time needed for the appointment.

   f. Click on the START DATE field and type in the first date on which a recurring appointment will be scheduled, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

   g. Click on the STOP DATE field and type in the last date on which a recurring appointment will be scheduled, or click on ▼ to use the Date Picker.

4. In the RECURRENCE panel,

   a. Click on WEEKLY to schedule the appointment on a weekly basis. Then,

      i) Click on EVERY __ WEEK(S) and type in the frequency of the weekly appointment.

      ii) Click on the specific day(s) of the week on which the weekly appointment will be scheduled. More than one day may be selected.

      [**Example**: Selecting **Weekly > Every 2 Weeks > Monday** will return results for every other Monday, starting the next Monday that occurs after today.]

-or-

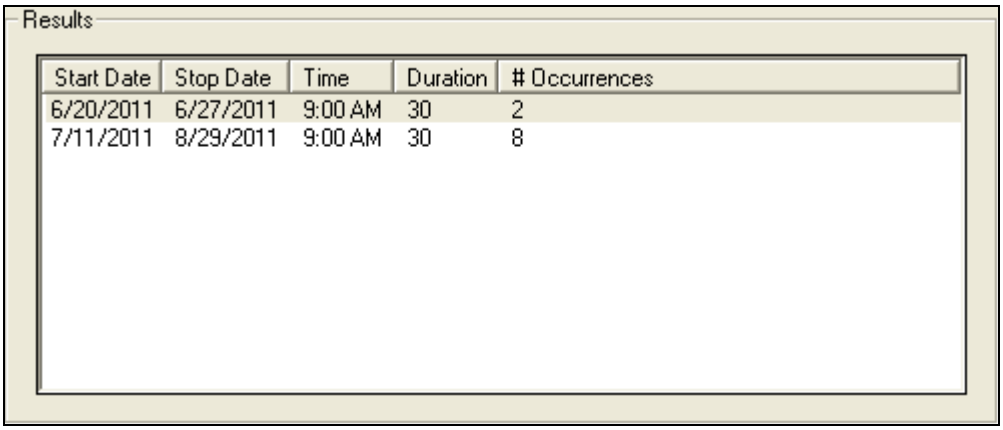
b. Click on MONTHLY to schedule the appointment on a monthly basis. Then,

i) Click on 1st, 2nd, 3rd, 4th, or LAST to specify the day of the month the appointment is to be scheduled.

ii) Click on the specific day(s) of the week on which the monthly appointment will be scheduled. More than one day may be selected.

[**Example**: Selecting **Monthly > 2nd > Monday** will return results for the second Monday of every month, starting the next second Monday.]

5. Click on FIND. The RESULTS panel will display all possible options. Here is an example:

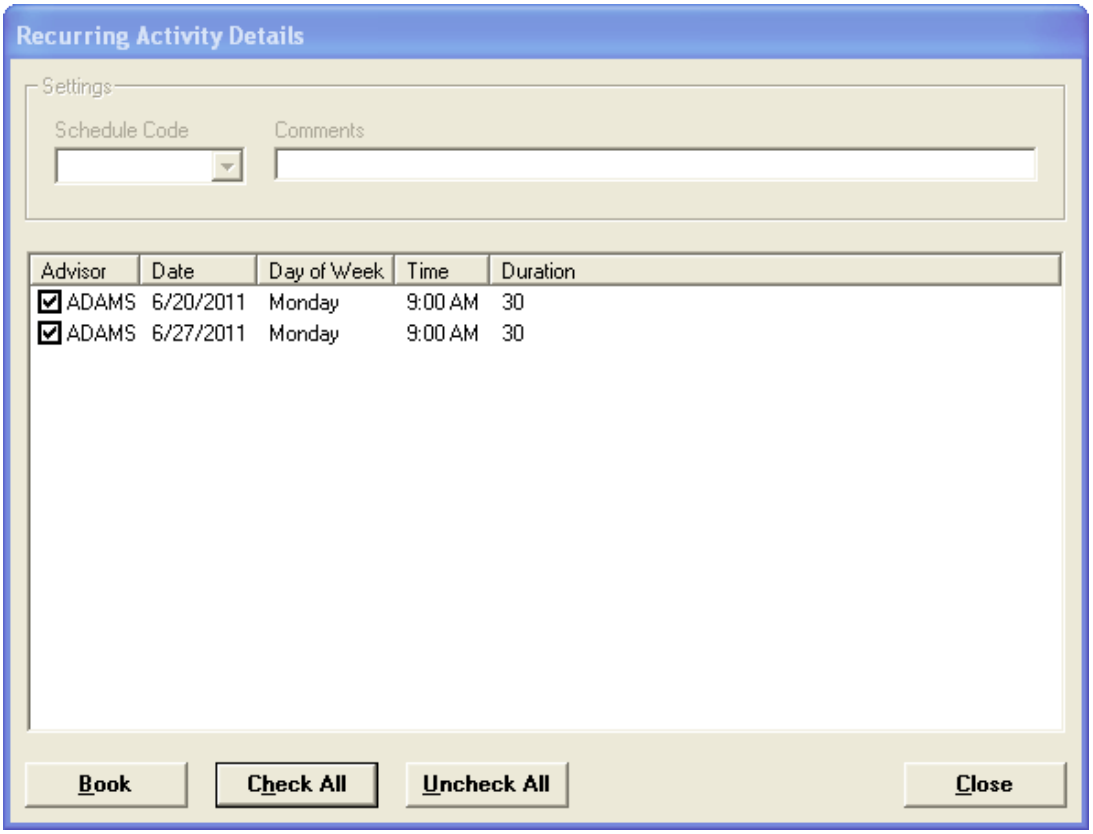


The Results panel displays the START DATE, STOP DATE, START TIME, DURATION, and the # OCCURRENCES that were found for the selected advisor and Location.

Note
If a date meeting the specified criteria is unavailable, the system ignores it. Separate results will be returned for date ranges that are broken by an unavailable date.

6. Click on the desired row(s) on the RESULTS panel and then click on DETAILS to display a RECURRING ACTIVITY DETAILS screen. More than one row may be selected by pressing the Control key when clicking.

Here is an example:



The options are:

- SCHEDULE CODE: [Enabled only when MEETING is selected.] Use to select the Schedule Code to be used as the replacement code for the recurring meeting (e.g., MTG).
- COMMENTS: [Enabled only when MEETING is selected.] Use to type in relevant comments or a description of the recurring meeting (e.g., Weekly Staff Meeting).
- BOOK: Use to book the selected dates and times.
- CHECK ALL: Use to select all of the dates shown.
- UNCHECK ALL: Use to deselect all of the selected dates.
- CLOSE: Use to exit the screen without completing the booking.

a. Disregard the SCHEDULE CODE and COMMENTS fields.

b. Review the detailed returns in the data panel. These represent the dates on which a recurring appointment may be scheduled.

c. Click on the desired checkbox(es) to book those dates and times for the recurring appointment.

Hint
Click on CHECK ALL to select all boxes with one click. Click on UNCHECK ALL to deselect all boxes with one click.

d. When all possible dates have been selected for the recurring appointment, click on BOOK.

e. Click on YES in response to the confirmation request. This action brings up the STUDENT APPOINTMENT screen, on which the details of the appointment may be booked.

PART VI – REPORTS

Introduction

SARS·REPORTS provides a variety of reports that are useful for day-to-day operations. Typically, system administrators and/or schedulers are the individuals who are authorized to generate reports.

Section 35 discusses the various Operational Reports and Early Alert Reports that are available. Operational reports display schedule information in a variety of formats.

Section 36 discusses the various eAdvising Reports that are available. eAdvising reports compile and enumerate eAdvising activities.

Section 37 discusses the various Statistical Reports that are available. Statistical reports compile and enumerate appointment activities.

Section 38 discussed the various System Administration Reports that are available.

Section 39 discusses the various Table Reports that are available. Table reports display the full descriptions of all the codes and names that were established in SARS·UTIL.

Section 40 discusses the viewing and printing reports, as well as exporting reports to an alternate format.

Access to most reports is via SARS·MENU, REPORTS.

SECTION 35 – OPERATIONAL REPORTS

35.0 Overview

This section covers the standardized operational reports and Early Alerts reports, most of which are available from SARS·REPORTS.

The following reports are contained in Section 35.

The Daily Report is available from both SARS·REPORTS and MY GRID.

The Master Schedule Report is available only from SARS·UTIL.

The Drop-In Report is available only from the STUDENT DROP-IN SCREEN.

35.1 Additional Information Report

There are three versions of the report: “Count of Students by Value,” “Roster of Students by Value,” and “History for Each Student by Value.” Use to obtain a printed list of students that fall within the selected Additional Information criteria and/or a history of their appointments and drop-ins. For example, a search for “International Student” who is a “Nursing Major” will return a list of all students who are listed as being “international students” and whose major is nursing.

For the version “Count of Students by Value,” the report displays the total count of all students that are in the SARS database who meet the selected criteria and date range. The report does not display any student or appointment information.

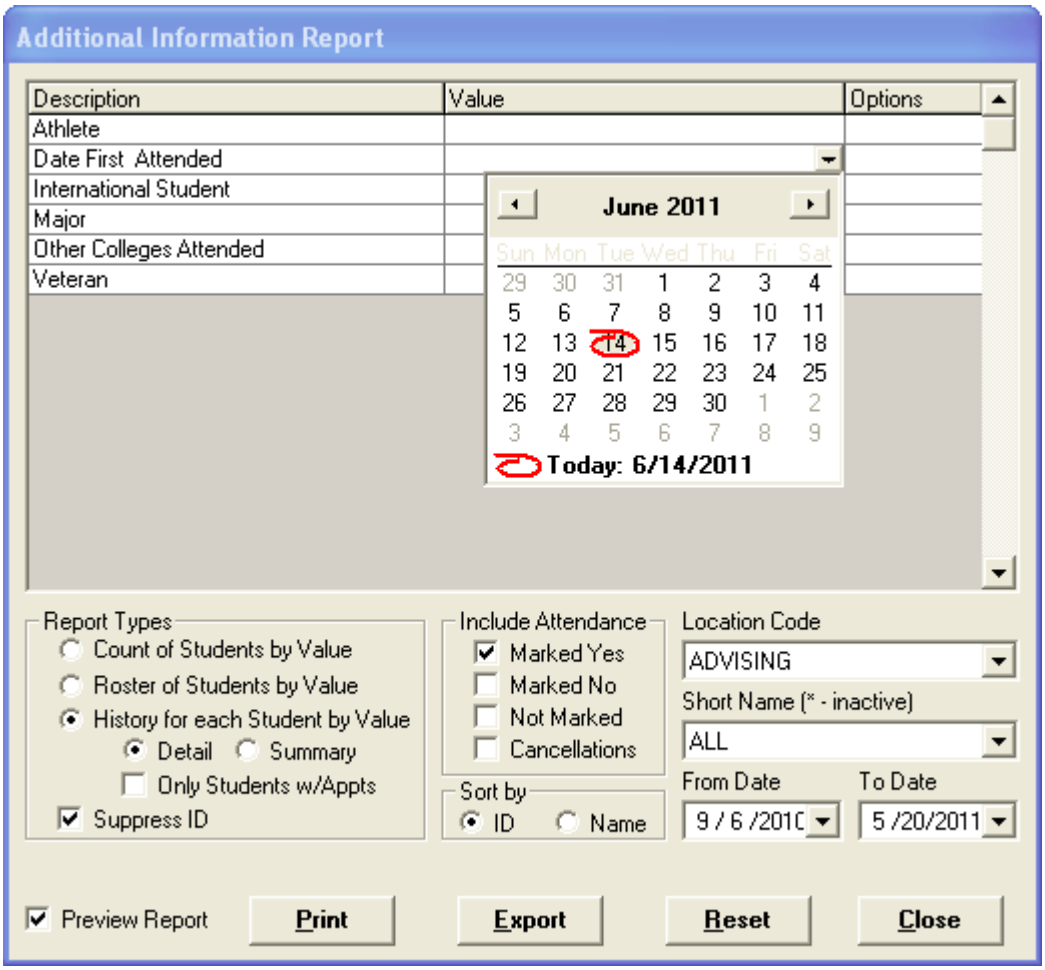
For the version “Roster of Students by Value,” the report displays, for all students that are in the SARS database who meet the selected criteria and date range, the student’s ID, name, birth date, home phone and contact phone, as well as the total number of students. The report does not display any appointment information.

The version “History for Each Student by Value” has two formats - Detail and Summary – as well as other filters.

- The “History for Each Student by Value - Detail Report” displays, for each student who meets the selected criteria within the date range, the student name and ID, and a list of appointments and drop-in visits, including the date, time, name of advisor, and reason code(s) and comments for each appointment. This report may be further refined by selecting the desired attendance status to be included in the report (Marked Yes, Marked No, Not Marked, and Cancellations). This version of the report will show students who do not have any appointment with blanks in the data fields, unless a final filter – “Only Students w/Appointments” – is selected. That selection will display a report that excludes students who meet the criteria but do not have any appointment or drop-in history for the selected date range. The bottom of the report displays the total number of students matching the selection criteria.

- The “History for Each Student by Value - Summary Report” displays, for each student who meets the selected criteria within the date range, the student’s ID and name and a tally of the number of appointments by attendance status, including drop-in visits. Because this report shows tallies by attendance status, all INCLUDE ATTENDANCE options on the setup screen are automatically checked. This version of the report will show students who do not have any appointment with blanks in the data fields, unless a final filter – “Only Students w/Appointments” – is selected. That selection will display a report that excludes students who meet the criteria but do not have any appointment or drop-in history for the selected date range. The bottom of the report displays the total number of students matching the selection criteria.

Here is an example of the setup screen used to generate the ADDITIONAL INFORMATION REPORT (shown below).



The following options appear on this screen:

- DESCRIPTION: Used to hold the question that will provide more detailed information about the student.

- VALUE: Use, if information about the Description (question) is to be retrieved for the report, to enter or select the answer that is associated with the adjacent description (question). The value will be in the format of a Date, a Yes/No response, one or more responses to be selected from a List, or a Text response to be typed in the space provided.

- OPTIONS: Use in connection with any value that requires a Date or Text response. For a Date response, the user will be prompted to select => (greater than or equal to), = (equal to), or <= (less than or equal to). For a Text response, the user will be prompted to select = (equal to) or "Contains."

- REPORT TYPES: Use to select the version of the report to be displayed or printed.

  - COUNT OF STUDENTS BY VALUE: Use to obtain a report for the designated Location and date range showing the total number of students that meet the selected criteria (e.g., the number of students who are international students and also nursing majors).

  - ROSTER OF STUDENTS BY VALUE: Use to obtain a report for the designated Location and date range showing a list of students, including student ID, name, birth date, home phone, and contact phone, who meet the criteria selected, as well as a total count.

  - HISTORY FOR EACH STUDENT BY VALUE: Use to obtain a report showing, for the designated Location and date range, a list of all students who meet the criteria, as well as any appointment history.

    - DETAIL: Use to obtain a report showing, for the designated date range and Location, the student's name and ID, and, if applicable, the appointment or drop-in date and time, the advisor's abbreviated name, the attendance status, and the reason(s) for the appointment or drop-in visit.

    - SUMMARY: Use to obtain a report showing, for the designated date range and Location, a list of all students who meet the selection criteria and, if applicable, the total number of their appointments by attendance status and a tally of drop-ins. When this option is selected, the Include Attendance panel is disabled.

    - ONLY STUDENTS W/ APPTS: Use in conjunction with the Detail or Summary version of the report to refine the "History for Each Student by Value" to exclude students who otherwise meet the criteria but had no appointment or drop-in activity during the selected date range.

  - SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.

- INCLUDE ATTENDANCE: Use when generating the "History for Each Student by Value," Detail format, to include data for each type of appointment status (Marked Yes, Marked No, Not Marked, Cancellations).

  - MARKED YES: Use to include, for the selected criteria and date range, those students who attended their appointments.

  - MARKED NO: Use to include, for the selected criteria and date range, those students who did not attend their appointments.

  - NOT MARKED: Use to include, for the selected criteria and date range, those students who had appointments for which attendance was not marked.

  - CANCELLATIONS: Use to include, for the selected criteria and date range, those students for whom appointments were cancelled.

- SORT BY: Use to control how the information is grouped on the ADDITIONAL INFORMATION REPORT.

  ID: Use to sort the information listed on the report by students' identifiers.

  NAME: Use to sort the information listed on the report by students' last names.

- LOCATION CODE: Use to select the Location to include in the report. The list will include all locations to which the user has access, including deleted locations.

- SHORT NAME (* - INACTIVE): Use when generating the "History for Each Student by Value," Detail or Summary format, to select history for the specified advisor, for all advisors, for all active advisors or for all inactive advisors. When "All" is selected, the report will include deleted Short Names.

- FROM DATE: Use when generating the "History for Each Student by Value," Detail or Summary format, to establish the first date of a date range on which to be reported.

- TO DATE: Use when generating the "History for Each Student by Value," Detail or Summary format, to establish the last date of a date range on which to be reported.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.

- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.

- CLOSE: Use to exit the screen.

35.1.1 Set-Up the Additional Information Report for Viewing or Printing

1. Click on LOCATION CODE ▼ and then click on the Location for which this report will be generated. The list will include all locations to which the user has access, including deleted locations.

2. In the REPORT TYPES panel, choose one of the following three options:

a. Click on COUNT OF STUDENTS BY VALUE to obtain a total tally of all students who meet the selected criteria.

-or-

b. Click on ROSTER OF STUDENTS BY VALUE to obtain a list of all students who meet the selected criteria.

-or-

c. Click on HISTORY FOR EACH STUDENT BY VALUE to obtain a list of students meeting the selected criteria and any appointment history for the selected date range. Then,

i) To obtain a detailed list of students who meet the selected criteria, including details for each appointment, if applicable, click on DETAIL. Additional options for this report include:

- To further filter this report to include only students who actually had appointment or drop-in history during the selected date range, click on ONLY STUDENTS W/ APPTS. This will restrict the list to only those students who had appointment activity during the selected date range.

- Go to the INCLUDE ATTENDANCE panel and then click on each type of attendance status to be included in the report. Any or all options may be selected.

-or-

ii) To obtain a list of students who meet the selected criteria, as well as a count of appointments and drop-ins by attendance status, if applicable, click on SUMMARY. Then,

- To further narrow the report, click on ONLY STUDENTS W/ APPTS. This will restrict the list to only those students who had appointment activity during the selected date range.

d. Click on SUPPRESS ID, if desired.

3. Under SORT BY, click on either ID or NAME to specify the order in which to sort the report information.

4. If selecting a type of "History for Each Student by Value," click on SHORT NAME (* = INACTIVE)▼ and then click on the Advisor for whom the report will be generated.

-or-

Click on ALL to include all advisors, including deleted Short Names.

-or-

Click on ALL – ACTIVE to include all active advisors.

-or-

Click on ALL – INACTIVE to include all inactive advisors.

5. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

6. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

7. Click within the space in the VALUE column adjacent to the description to be used in the report. If ▼ appears, click on ▼ and select from the available choices.

   a. If the value selected is a Date, click on VALUE ▼ and select the date using the date picker. You may also click on the OPTIONS field on the same line, and then select one of the following three options: => (greater than or equal to), = (equal to), or <= (less than or equal to).

   b. If the value entered is a Text response, click on VALUE ▼ and then type in the desired text. You may also click on the OPTIONS field on the same line, and select one of the following two options: = (equal to) or "Contains."

   c. If the value selected is Yes/No, click on VALUE ▼ and select either Yes or No from the menu. No options are available in the OPTIONS column.

   d. If the value is a selection from a drop-down list (e.g., Major), click on VALUE ▼ and select the desired option. To select more than one option, click on VALUE ▼ and, while holding down the Control key, click on each selection to be included. They will be listed on the same line, separated by commas. No options are available in the OPTIONS column.

8. Continue to select other values and options until all desired questions and answers have been selected.

9. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40.)

Note
When selecting History for each Student by Value, a progress bar will display the status of the report generation. When the procedure is done, the progress bar is no longer displayed.

10. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the ADDITIONAL INFORMATION REPORT in the COUNT OF STUDENTS BY VALUE – SUMMARY version.

Additional Information Report

Count of Students by Value

Report Criteria: International Student = (Yes); Major = (Nursing)

Count
13

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Here is an example of the ADDITIONAL INFORMATION REPORT in the ROSTER OF STUDENTS BY VALUE – DETAIL version, sorted by Student Name.

Additional Information

Roster of Students by Value

Report Criteria: International Student = (Yes); Major = (Nursing)

Student ID	Student Name	Birth Date	Home Phone	Contact Phone
99999999	BLACK, JOSIE	01/25/1979		(415) 727-3747
22222222	BLUE, BETTY	08/14/1977		(415) 456-7944
00000002	BROWN, BERNARD	05/27/1957		(415) 214-6053
77777777	GREENE, SUSAN	02/17/1974	(510) 789-1265	(510) 489-7784
00000003	GREY, GARSON	03/31/1973	(650) 933-5756	
00000004	MAUVE, DOTTIE	05/18/1979	(415) 646-6776	
55555555	ORANGE, OTTO	05/26/1960	(510) 383-2766	(650) 667-7889 x 9
88888888	PINK, PINKIE	08/29/1978	(650) 734-5110	
66666666	PURPLE, PANSY	09/18/1980		(415) 222-3334
33333333	RED, FOXX	11/14/1957	(650) 549-6546	
11111111	SMITH, JOHN	04/21/1973	(510) 556-7676	
00000001	WHITE, WINNIE	06/16/1949	(415) 556-3797	
44444444	YELLOW, YVETTE	08/19/1977	(415) 093-4777	

Total Students Found: 13

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Here is an example of the ADDITIONAL INFORMATION REPORT in the HISTORY FOR EACH STUDENT BY VALUE - DETAIL version, sorted by Student ID, including three types of attendance status, without the "Only Students w/Appointments" filter.

Additional Information Report

History for Each Student by Value - Detail
Includes Students without Appointments
1/10/2011 - 4/29/2011
Short Name: ALL

Report Criteria: International Student = (Yes); Major = (Nursing)

Attendance: ☑ Attended ☑ Not Attended ☑ Not Marked ☐ Cancelled

Student ID	Student Name	Date	Time	Short Name	Reason Code(s) & Comments	Attendance Status
00000004	MAUVE, DOTTIE					
		1/24/2011	1:00 PM	VANBUREN	PROB	Marked Yes
		2/14/2011	2:00 PM	WASHINGTN	PROB	Marked No
		3/31/2011	11:30 AM	WASHINGTN	PROB	Marked Yes
		4/18/2011	4:30 PM	ADAMS	PROB	Marked No
00000001	WHITE, WINNIE					
	00000002	BROWN, BERNARD				
	3/6/2011	3:30 PM	ADAMS	TRANSFER	Marked Yes	
00000003	GREY, GARSON					
	1/27/2011	12:00 PM	MADISON	ED PLAN	Marked Yes	
	4/14/2011	10:00 AM	MADISON	PERSONAL	Marked Yes	
00000004	MAUVE, DOTTIE					
		1/24/2011	1:00 PM	VANBUREN	PROB	Marked Yes
		2/14/2011	2:00 PM	WASHINGT	PROB	Marked No
		3/31/2011	11:30 AM	WASHINGTN	PROB	Marked Yes
		4/18/2011	4:30 PM	ADAMS	PROB	Marked No
66666666	PURPLE, PANSY					
		1/24/2011	9:30 AM	MADISON	F-1	Marked Yes
		3/6/2011	9:00 AM	JEFFERSN	ED PLAN	Marked Yes
		4/4/2011	11:00 AM	MADISON	ED PLAN	Marked Yes
77777777	GREENE, SUSAN					
		4/14/2011	12:00 PM	JACKSON	TRANSFER - Unknown	Marked Yes
88888888	PINK, PINKIE					
99999999	BLACK, JOSIE					
		1/27/2011	12:00 PM	MADISON	ED PLAN	Marked Yes
		4/14/2011	10:00 AM	MADISON	PERSONAL	Marked Yes

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Here is an example of the ADDITIONAL INFORMATION REPORT in the HISTORY FOR EACH STUDENT BY VALUE - SUMMARY version, sorted by Student ID, with the "Only Students w/ Appointments" filter.

Additional Information

History for Each Student by Value - Summary
1/10/2011 - 4/29/2011
Short Name: ALL

Report Criteria: International Student = (Yes); Major = (Nursing)

Student ID	Student Name	Attended	Not Attended	Not Marked	Cancelled	Drop-ins
0000002	BROWN, BERNARD	1				
0000003	GREY, GARSON	2				
0000004	MAUVE, DOTTIE	2	2			
1111111	SMITH, JOHN	2				
2222222	BLUE, BETTY	1				4
3333333	RED, FOXX	2	2			
5555555	ORANGE, OTTO	1				1
6666666	PURPLE, PANSY	3				
7777777	GREENE, SUSAN	1				
8888888	PINK, PINKIE					3
9999999	BLACK, JOSIE	2				

Total Students Found: 11

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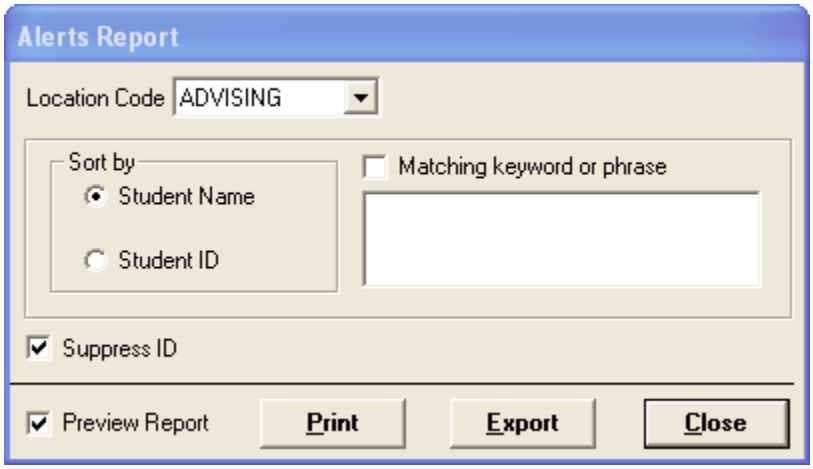
35.2 Alerts Report

Use this report to obtain a printed list of existing alerts written about students who are in the database. This report is useful for finding obsolete alerts to delete, for determining whether a particular student has any alerts relevant to the Location to which the user has access, and for creating a list of all students who have alerts addressing a similar topic. For example, a search for "Probation" will return a list of all students for whom an alert contains the word "probation".

Each line on this list contains a student's ID, name, and any existing alerts, regardless of Location.

Here is an example of the setup screen used to generate the ALERTS REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the Location to include in the report. The list will include all locations to which the user has access, including deleted locations.

- SORT BY: Use to control how the information is grouped on the ALERTS REPORT.

  STUDENT NAME: Use to sort the information listed on the report by the last name of the student.

  STUDENT ID: Use to sort the information listed on the report by students' identifiers.

- MATCHING KEYWORD OR PHRASE: Use to refine the list to show only those alerts that contain the selected word or phrase.

- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate viewing or printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- CLOSE: Use to exit the screen.

35.2.1 Set-Up the Alerts Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on ALERTS REPORT to display the setup screen.
4. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations.
5. Then click on the selected code.
6. In the SORT BY panel, click on either STUDENT NAME or STUDENT ID to specify the order in which to sort the report information.
7. If desired, click on MATCHING KEYWORD OR PHRASE and enter a word or phrase in the MATCHING KEYWORD OR PHRASE field to generate a list that contains only those student alerts containing that keyword or phrase.
8. Click on SUPPRESS ID, if desired.
9. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40.)

Here is an example of the ALERTS REPORT.

Alerts Report

Sorted by Student ID

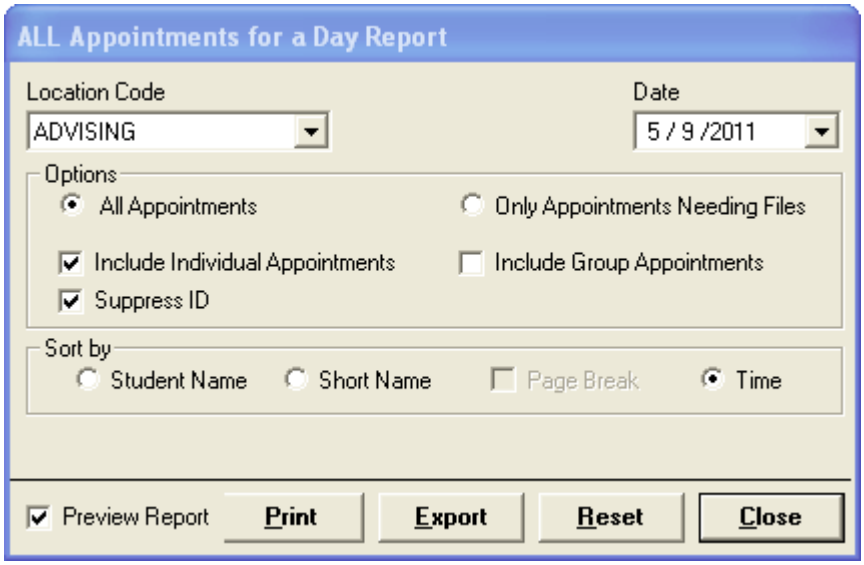
ID	Student Name	Alert	Location
0000001	WHITE, WINNIE	Missed 3 appointments. Now on drop-in basis.	ADVISING
0000002	BROWN, BERNARD	Need transcripts from Front Range Community College, Boulder and Longmont. Remind student to bring to next appointment.	ADVISING
0000003	GREY, GARSON	Student on probation.	COUNSELING
0000004	MAUVE, DOTTIE	Student has had only 1 appointment out of required 3. Remind student of requirement.	ADVISING
1111111	SMITH, JOHN	Missed last 3 appointments. Allow only drop-in next time.	ADVISING
2222222	BLUE, BETTY	Remind student to bring in financial aid papers.	ADVISING
3333333	RED, FOXX	Hearing-impaired student. Inform office administrator of appointment date and time so that arrangements may be made for American Sign Language interpreter.	ADVISING
4444444	YELLOW, YVETTE	Only make appointments for this student with John Adams.	COUNSELING
5555555	ORANGE, OTTO	Missed 3 consecutive appointments. Drop-in next time.	ADVISING
6666666	PURPLE, PANSY	Remind student to bring in transcripts from College of DuPage, William Rainey Harper College, and Morton College.	ADVISING
7777777	GREENE, SUSAN	Notified by A&R that student still owes fees.	ADVISING
8888888	PINK, PINKIE	Honors student. Assign to Abraham Lincoln.	ADVISING
9999999	BLACK, JOSIE	Student needs to bring proficiency test scores to next advising appointment.	ADVISING

35.3 All Appointments for a Day Report

Use this report to obtain a list of all students who have an appointment on a specific date and by a specific LOCATION CODE or of only those students for whom transcripts are needed. This list will facilitate retrieving student documents prior to appointments.

When generated for individual appointments, the list contains an alert symbol (!) if there is an alert for the student; the student's ID, name, and telephone number; the time and duration of the appointment; and the Advisor's SHORT NAME. When generated for only group appointments, the list contains an alert symbol (!) if there is an alert for the student; the student's ID, name, date of birth, and telephone number; and the Advisor's SHORT NAME.

Here is an example of the setup screen used to generate the ALL APPOINTMENTS FOR A DAY REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the Location to be included in the report. The list will include all locations to which the user has access, including deleted locations.
- DATE: Use to select the date to be viewed or printed.
- OPTIONS: Use to control whether the report lists all appointments or only those appointments for which files are needed.

  ALL APPOINTMENTS: Use to select all appointments for the report.

  ONLY APPOINTMENTS NEEDING FILES: Use to select only those appointments for which PULL FILE was checked on the STUDENT APPOINTMENT screen. When this option is selected, the Include Group Appointments checkbox will be disabled.

  INCLUDE INDIVIDUAL APPOINTMENTS: Use to specify that individual appointments should be displayed on the report.

INCLUDE GROUP APPOINTMENTS:	Use to specify that group appointments should be displayed on the report.
SUPPRESS ID:	Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.
• SORT BY:	Use to control how the information is grouped on the ALL APPOINTMENTS FOR A DAY REPORT.
STUDENT NAME:	Use to sort the information listed on the report by the last name of the student.
SHORT NAME:	Use to sort the information listed on the report by the SHORT NAME of the advisor.
PAGE BREAK:	[Displayed only when SORT BY SHORT NAME is selected] Use to print a separate page for each Advisor.
TIME:	Use to sort the information listed on the report by time.
• PREVIEW REPORT:	Use to display a report on the screen prior to or in lieu of printing.
• PRINT:	Use to initiate printing of the report.
• EXPORT:	Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
• RESET:	Use to restore all of the report set-up screen selections to the initial defaults.
• CLOSE:	Use to exit the screen.

35.3.1 Set-Up the All Appointments for a Day Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on ALL APPOINTMENTS FOR A DAY REPORT to display the setup screen.
4. Click on the location in the LOCATION CODE field to select the location to be included in the report. The list will include all locations to which the user has access, including deleted locations.
5. Click on DATE and type in the desired date, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)
6. In the Options panel,

a. Click on ALL APPOINTMENTS to select all appointments.

   -or-

   Click on ONLY APPOINTMENTS NEEDING FILES to select only those individual appointments for which PULL FILES has been checked.

b. Click on INCLUDE INDIVIDUAL APPOINTMENTS to display individual appointments on the report.

   -and/or-

   [Enabled only if the ALL APPOINTMENTS option is selected] Click on INCLUDE GROUP APPOINTMENTS to display group appointments on the report.

   Note
   If both the Individual and Group Appointment options are selected, the report will display all individual appointments on the first pages, followed by group appointments on the following pages.

c. Click on SUPPRESS ID, if desired.

7. In the Sort by panel,

   a. Click on one of the following – STUDENT NAME, SHORT NAME, or TIME – to specify the order in which to sort the report information.

   b. If SHORT NAME is selected, click on the PAGE BREAK checkbox to print a separate page for each Advisor,

      -or-

      Leave PAGE BREAK unchecked to print a sequential report.

8. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40.)

   Notes
   When viewing the report, the first page(s) to be displayed will contain Individual Appointments. Click on the X at the upper right of the screen, or click on the icon to the left of the Report title, and then click on CLOSE to display the pages containing the Group Appointments. After viewing the Group Appointments, click on X at the top of the screen or on CLOSE to return to the set up screen.

   When printing the report for both Individual and Group Appointments, it is necessary to execute the print command twice – first to print the pages containing Individual Appointments and then to print the pages containing Group Appointments.

   Each Group Appointment prints sequentially.

9. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the ALL APPOINTMENTS FOR A DAY REPORT displaying individual appointments, sorted by appointment time with ID numbers suppressed.

All Appointments for a Day Report

All Appointments on Monday, May 09, 2011
Sorted by Time

!	ID	Student Name	Phone Number	Time	Duration	Short Name
	********	SMITH, JOHN	(650) 667-7889 x 9	08:30 AM	30	PIERCE
!	********	INDIGO, IRIS	(415) 432-1613	09:00 AM	30	PIERCE
!	********	BROWN, ROBERT	(510) 556-7676	09:30 AM	30	LINCOLN
	********	GREEN, GEORGE	(415) 727-3747	09:30 AM	30	PIERCE
	********	TAN, THOMAS	(415) 567-8901	12:00 PM	30	BUCHANAN
	********	WHITE, WILLIAM	(510) 925-6752	12:00 PM	30	MADISON
!	********	ORANGE, ORVILLE	(415) 555-6666	12:30 PM	30	POLK
	********	TAN, THOMAS	(415) 532-7851	01:00 PM	60	LINCOLN
	********	GOLD, GARY	(415) 565-7585	01:00 PM	30	PIERCE

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Here is an example of the ALL APPOINTMENTS FOR A DAY REPORT, displaying individual appointments sorted by Short Name with Page Break unchecked.

All Appointments for a Day Report

All Appointments on Monday, May 09, 2011
Sorted by Short Name

!	ID	Student Name	Phone Number	Time	Duration	Short Name
	********	BLUE, BETTY	(415) 454-6464	04:30 PM	30	ADAMS
!	********	SMITH, JOHN	(415) 456-7890	04:00 PM	60	ADAMS
	********	GREENE, SUSAN	(415) 222-3334	06:30 PM	30	BUCHANAN
	********	ORANGE, OTTO	(510) 489-7784	05:00 PM	30	BUCHANAAN
!	********	PINK, PINKIE	(510) 929-3949	07:00 PM	30	BUCHANAN
	********	PURPLE, PANSY	(415) 214-6053	06:00 PM	30	BUCHANAN
	********	RED, FOXX	(415) 567-8901	12:00 PM	30	BUCHANAN
	********	YELLOW, YVETTE	(415) 948-2654	04:00 PM	30	BUCHANAN
!	********	BLACK, JOSIE	(510) 556-7676	09:30 AM	30	LINCOLN
	********	BROWN, BERNARD	(510) 275-3165	04:00 PM	30	LINCOLN
	********	WHITE, WINNIE	(415) 532-7851	01:00 PM	60	LINCOLN
	********	ALBERT, ALLEN	(415) 111-1112	04:30 PM	30	MADISON
	********	DOE, JANE	(415) 456-7944	03:00 PM	30	MADISON
	********	DOE, JOHN	(415) 123-4123	04:00 PM	30	MADISON
	********	GREY, GARSON	(510) 925-6752	12:00 PM	30	MADISON
	********	MAUVE, DOTTIE	(415) 646-6776	02:30 PM	30	MADISON
	********	COWAN, PETER	(415) 727-3747	09:30 AM	30	PIERCE
	********	ENRIQUEZ, TOM	(415) 565-7585	01:00 PM	30	PIERCE
!	********	GOREN, GILBERT	(650) 852-1826	01:30 PM	30	PIERCE
	********	JONES, SADIE	(650) 667-7889 x 9	08:30 AM	30	PIERCE
	********	PRUITT, ELLIE	(415) 415-9165	02:00 PM	30	PIERCE
!	********	SMITH, RONALD	(415) 432-1613	09:00 AM	30	PIERCE
	********	BROAD, JOHN	(415) 111-2223	04:30 PM	30	POLK
!	********	GILL, ELEANOR	(415) 555-6666	06:30 PM	30	POLK
	********	LEONG, LILY	(415) 475-8956	03:00 PM	30	POLK
	********	THAYER, JAMES	(415) 651-3762	05:30 PM	30	POLK
!	********	VASQUEZ, RENE	(415) 555-6666	12:30 PM	30	POLK
	********	WANG, JERRY	(415) 626-3646	03:30 PM	30	POLK
	********	PRUITT, PAMELA	(415) 093-4777	02:30 PM	30	ROOSEVLT
	********	SORENSEN, TOM	(650) 953-6865	03:30 PM	30	TAYLOR

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Here is an example of the ALL APPOINTMENTS FOR A DAY REPORT, displaying only group appointments sorted by student's last name with ID numbers suppressed.

All Appointments for a Day Report

All Group Appointments on Monday, May 09, 2011
Sorted by Student Name

Time: 10:00 AM – Orientation – Franklin Delano Roosevelt

ID	Student Name	DOB	Phone Number	Short Name
********	ALBERT, ALLEN	04/14/1944	(415) 111-1112	MADISON
********	BLACK, JOSIE	09/15/1967	(510) 556-7676	LINCOLN
********	BLUE, BETTY	04/21/1973	(415) 454-6464	ADAMS
********	BROAD, JOHN	01/06/1955	(415) 111-2223	POLK
********	BROWN, BERNARD	08/14/1977	(510) 275-3165	LINCOLN
********	COWAN, PETER	11/14/1957	(415) 727-3747	PIERCE
********	DOE, JANE	05/06/1953	(415) 456-7944	MADISON
********	DOE, JOHN	05/26/1960	(415) 123-4123	MADISON
********	ENRIQUEZ, TOM	10/26/1979	(415) 565-7585	PIERCE
********	GILL, ELEANOR	11/11/1981	(415) 555-6666	POLK
********	GOREN, GILBERT	09/18/1980	(650) 852-1826	PIERCE
********	GREENE, SUSAN	12/26/1980	(415) 222-3334	BUCHANAN
********	GREY, GARSON	02/17/1974	(510) 925-6752	MADISON
********	JONES, SADIE	08/29/1978	(650) 667-7889 x 9	PIERCE
********	LEONG, LILY	11/01/1964	(415) 475-8956	POLK
********	MAUVE, DOTTIE	05/01/1971	(415) 646-6776	MADISON
********	ORANGE, OTTO	01/25/1979	(510) 489-7784	BUCHANAN
********	PINK, PINKIE	06/16/1949	(510) 929-3949	BUCHANAN
********	PRUITT, ELLIE	11/04/1934	(415) 415-9165	PIERCE
********	PRUITT, PAMELA	05/27/1957	(415) 093-4777	ROOSEVT
********	PURPLE, PANSY	03/31/1973	(415) 214-6053	BUCHANAN
********	RED, FOXX	05/18/1979	(415) 567-8901	BUCHANAN
********	SMITH, JOHN	01/05/1956	(415) 456-7890	ADAMS
********	SMITH, RONALD	08/15/1962	(415) 432-1613	PIERCE
********	SORENSEN, TOM	07/05/1979	(650) 953-6865	TAYLOR
********	THAYER, JAMES	03/14/1979	(415) 651-3762	POLK
********	VASQUEZ, RENE	03/06/1964	(415) 555-6666	POLK
********	WANG, JERRY	03/01/1968	(415) 626-3646	POLK
********	WHITE, WINNIE	02/27/1980	(415) 532-7851	LINCOLN
********	YELLOW, YVETTE	06/03/1980	(415) 948-2654	BUCHANAN

Students Enrolled: 30 Space Available: 0

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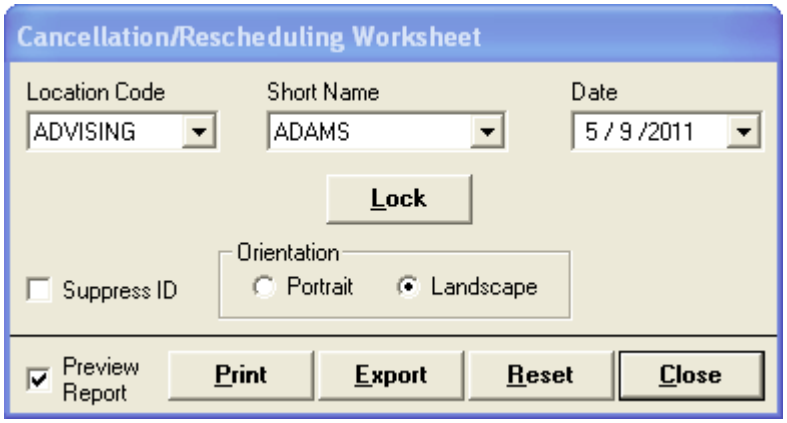
35.4 Cancellation/Rescheduling Worksheet

Only those individuals who have the access right, SCHEDULE APPOINTMENTS FROM THE GRID, may view or print this report.

Use this report for a selected Location to obtain a list of appointments for a specific date that must be cancelled or rescheduled due to an advisor's unavailability. This worksheet contains the time of each appointment, and the student's ID and name, telephone numbers, and e-mail address (in landscape orientation only). There is also space available for a scheduler to note any action taken.

Here is an example of the setup screen used to generate the CANCELLATION/ RESCHEDULING WORKSHEET.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- SHORT NAME: Use to select the Short Name about whom the report will be generated.
- DATE: Use to select the date to be viewed or printed.
- LOCK: Use to lock a column on THE GRID so that other users are prevented from scheduling appointments for the advisor on the unavailable date.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.
- ORIENTATION: Use to control whether information on the report will be displayed using a vertical (portrait) or horizontal (landscape) page orientation.

  PORTRAIT: Use to orient a report vertically on a page. In this format, the report will not display students' email addresses.

LANDSCAPE:	Use to orient a report horizontally on a page. In this format, a column will be available for displaying students' email addresses.
• PREVIEW REPORT:	Use to display a report on the screen prior to or in lieu of printing.
• PRINT:	Use to initiate printing of the report.
• EXPORT:	Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
• RESET:	Use to restore all of the report set-up screen selections to the initial defaults.
• CLOSE:	Use to exit the screen.

35.4.1 Set-Up the Cancellation/Rescheduling Worksheet for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on CANCELLATION/RESCHEDULING WORKSHEET to display the setup screen.
4. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on SHORT NAME▼ and then click on the name of the advisor for whom the report will be generated.
6. Click on DATE and type in the desired date, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
7. If you have not already locked the column on THE GRID so that other users are prevented from scheduling appointments for the Advisor on the unavailable date, click on LOCK. A confirmation message will be displayed.
8. Click on YES.
9. Click on SUPPRESS ID, if desired.
10. Click on either PORTRAIT or LANDSCAPE page orientation. The e-mail address is shown only on the Landscape Orientation.
11. Preview, print or export the worksheet. (See "View, Print and Export Reports" in Section 40.)
12. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the CANCELLATION/RESCHEDULING WORKSHEET, landscape version.

Cancellation/Rescheduling Worksheet

ADAMS - Monday, May 9, 2011

Cancel or reschedule the following appointments:

Time	ID	Student Name	Home Phone	Contact Phone	Email
12:00 PM	1111111	SMITH, JOHN	(415) 555-1212	(510) 925-6752 x 12	jsmith@nbcc.edu
12:30 PM	2222222	BROWN, ROBERT	(510) 121-2121	(510) 121-2121	bbrown@aol.com
1:00 PM	3333333	YELLOW, YVONNE		(415) 434-3535	
2:30 PM	4444444	GREEN, GEORGE	(510) 111-1112		ggreen@nbcc.edu
3:00 PM	5555555	WHITE, WILLIAM	(650) 323-1234	(415) 123-4567	
4:00 PM	6666666	ORANGE, ORVILLE	(415) 123-4123		oorangell@aol.com

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Here is an example of the CANCELLATION/RESCHEDULING WORKSHEET, portrait version.

Cancellation/Rescheduling Worksheet

ADAMS - Monday, May 16, 2011

Cancel or reschedule the following appointments:

Time	ID	Student Name	Home Phone	Contact Phone
12:00 PM	1111111	SMITH, JOHN	(415) 555-1212	(510) 925-6752 x 12
12:30 PM	2222222	BROWN, ROBERT	(510) 121-2121	(510) 121-2121
1:00 PM	3333333	YELLOW, YVONNE		(415) 434-3535
2:30 PM	4444444	GREEN, GEORGE	(510) 111-1112	
3:00 PM	5555555	WHITE, WILLIAM	(650) 323-1234	(415) 123-4567
4:00 PM	6666666	ORANGE, ORVILLE	(415) 123-4123	

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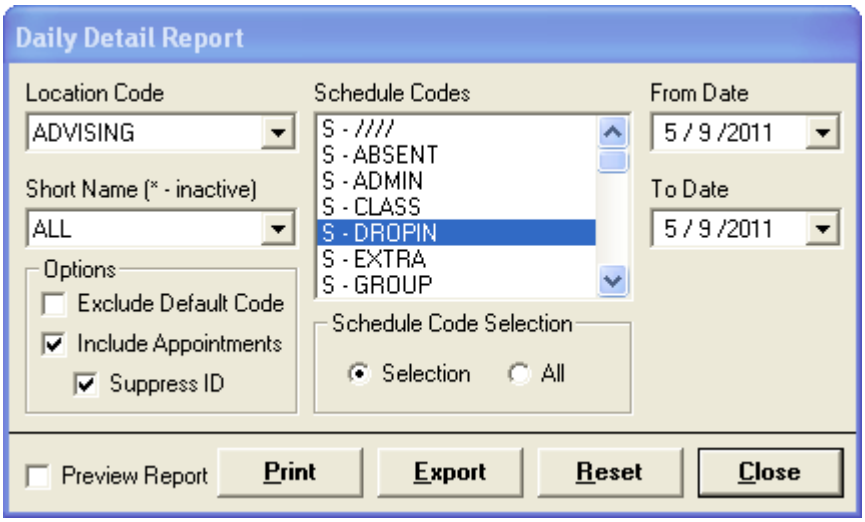
35.5 Daily Detail Report

Use this report to obtain a list of activities arranged by time for one or all advisors. The report displays the day, date, time, advisor, and any activities that have been selected.

Here is an example of the setup screen used to generate the DAILY DETAIL REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.

- SHORT NAME (* - INACTIVE): Use to select the Short Name of the advisor about whom the report will be generated.

- OPTIONS:

  EXCLUDE DEFAULT CODE: Use to generate the report for all Schedule Codes <u>except</u> for the Default Master Schedule Code.

  INCLUDE APPOINTMENTS: Use to include scheduled appointments in addition to all other activities on the report.

  SUPPRESS ID: [Enabled only when the INCLUDE APPOINTMENTS option is selected] Use to replace actual ID with asterisks to insure confidentiality of student IDs on a printed report.

- SCHEDULE CODES: Use to display a list of Schedule Code(s) and/or Schedule Code Group(s) that may be selected for the report. Schedule Codes preceded by the letter “S” are individual Schedule Codes. Schedule Codes preceded by the letter “G” are Schedule Code Group Codes.

SCHEDULE CODE SELECTION:

SELECTION:	Use to include only the highlighted Schedule Codes in the report.
ALL:	Use to include all Schedule Codes in the report.
• FROM DATE:	Use to establish the first date of a date range on which to be reported.
• TO DATE:	Use to establish the last date of a date range on which to be reported.
• PREVIEW REPORT:	Use to display a report on the screen prior to or in lieu of printing.
• PRINT:	Use to initiate printing of the report.
• EXPORT:	Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
• RESET:	Use to restore all of the report set-up screen selections to the initial defaults.
• CLOSE:	Use to exit the screen.

35.5.1 Set-Up the Daily Detail Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on DAILY DETAIL REPORT to display the setup screen.
4. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on SHORT NAME (* - INACTIVE)▼ and then click on the Advisor for whom the report will be generated,

   -or-

   Click on ALL to include all advisors.

   -or-

   Click on ALL – ACTIVE to include all active advisors.

   -or-

Click on ALL – INACTIVE to include all inactive advisors.

6. In the Options panel, choose one or more of the following options:

   a. Click on the EXCLUDE DEFAULT CODE check box if you do not want the report to include the Default Master Schedule Code.

   b. Click on INCLUDE APPOINTMENTS to include scheduled appointments in addition to all other activities in the report.

   c. [If INCLUDE APPOINTMENTS is selected] Click on SUPPRESS ID, if desired.

7. Under SCHEDULE CODE SELECTION, choose one of the following options:

   a. Click on SELECTION and then highlight one or more Schedule Codes from the list above to generate the report for multiple Schedule Codes.

   b. Click on ALL to generate the report for all Schedule Codes.

8. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)

9. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

10. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40.)

11. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the DAILY DETAIL REPORT, with the Default Schedule Code excluded and Suppress ID selected.

Daily Detail Report

Monday, May 09, 2011

Time	Name	Activity
8:00 AM	JOHN ADAMS	Off
	ANDREW JACKSON	Off
	THOMAS JEFFERSON	Preparation Time
	JAMES MADISON	Off
	ABRAHAM LINCOLN	Off
	FRANKLIN PIERCE	Preparation Time
	JAMES K. POLK	Drop-in Appointment
8:30 AM	JOHN ADAMS	Drop-in Appointment
	ANDREW JACKSON	Off
	THOMAS JEFFERSON	Test
	JAMES MADISON	Off
	ABRAHAM LINCOLN	Off
	FRANKLIN PIERCE	Class
	JAMES K. POLK	DOMINGUEZ, ROBERTO
9:00 AM	JOHN ADAMS	Drop-in Appointment
	ANDREW JACKSON	Off
	THOMAS JEFFERSON	Test
	JAMES MADISON	Off
	ABRAHAM LINCOLN	Off
	FRANKLIN PIERCE	Class
	JAMES K. POLK	TOM, THOMAS
9:30 AM	JOHN ADAMS	Drop-in Appointment
	ANDREW JACKSON	Off
	THOMAS JEFFERSON	Test
	JAMES MADISON	Off
	ABRAHAM LINCOLN	Off
	FRANKLIN PIERCE	GREENE, GEORGE
	JAMES K. POLK	Available Appointment
10:00 AM	JOHN ADAMS	Meeting
	ANDREW JACKSON	Meeting
	THOMAS JEFFERSON	Meeting
	JAMES MADISON	Meeting
	ABRAHAM LINCOLN	Meeting
	FRANKLIN PIERCE	Meeting
	JAMES K. POLK	Meeting
10:30 AM	JOHN ADAMS	Meeting
	ANDREW JACKSON	Meeting
	THOMAS JEFFERSON	Meeting
	JAMES MADISON	Meeting
	ABRAHAM LINCOLN	Meeting
	FRANKLIN PIERCE	Meeting
	JAMES K. POLK	Meeting

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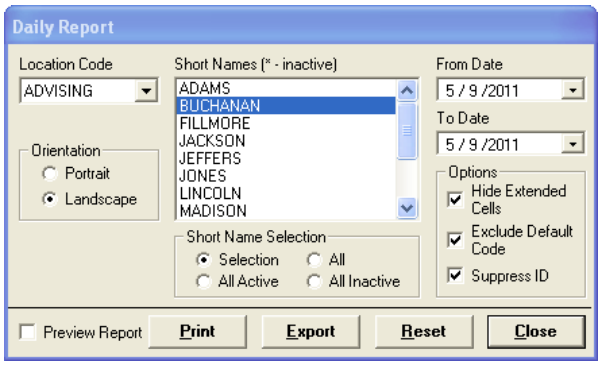
35.6 Daily Report

Use this report to obtain a printed schedule of one or more advisor's daily schedule within the same Location. This report may be printed either in portrait or landscape. In portrait, the report displays each scheduled activity by time. If the activity is an appointment, the student's name, ID, and telephone number, as well as the reason(s) for the appointment are displayed. In landscape, the report also displays any comments about the activities.

The DAILY REPORT is also available from MY GRID.

Here is an example of the setup screen used to generate the DAILY REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.

- ORIENTATION: Use to control whether information on the report will be displayed using a vertical (portrait) or horizontal (landscape) page orientation.

  PORTRAIT: Use to orient a report vertically on a page.

  LANDSCAPE: Use to orient a report horizontally on a page.

- SHORT NAMES (* - INACTIVE): Use to select the Short Name(s) of the advisor(s) about whom the report will be generated.

  SHORT NAME SELECTION:

    SELECTION: Use to include only the highlighted Short Names in the report.

    ALL: Use to select all active and inactive advisors for inclusion in the report. This option may also be used if most of the Short Names will be selected; it will highlight all Short Names, and then the names to be excluded may be deselected by clicking on them.

    ALL ACTIVE: Use to select All Active Short Names for the report, excluding any inactive Short Names.

ALL INACTIVE: Use to select only the inactive Short Names for the report, excluding any active Short Names.

- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- OPTIONS:

  HIDE EXTENDED CELLS: Use to display only the starting time of each activity. This option will reduce the length of the report to be printed when a schedule contains extended appointments or extended activities.

  EXCLUDE DEFAULT CODE: Use to shorten the report by eliminating time slots that contain the Default Master Schedule Code, which is displayed in any cell for which no other Schedule Code has been entered (e.g., ////).

  SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student IDs on a printed report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

35.6.1 Set-Up the Daily Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on DAILY REPORT to display the setup screen.
4. Click on LOCATION CODE▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on either PORTRAIT or LANDSCAPE page orientation.

Notes
The Landscape Orientation, which is the default, prints each activity by time. If the activity is an appointment, this orientation shows the student's name, ID, and telephone number, as well as the reason(s) for the appointment. It also prints any comments about each activity. The information is displayed horizontally on a page.

The Portrait Orientation prints each activity by time. It includes all information that is displayed in the Landscape Orientation, except for Comments. The information is displayed vertically on a page.

6. Select the SHORT NAMES to be included in the report using one of the following options:

   a. Click on SELECTION in the Short Name Selection panel and then highlight each name to be included in the report.

      -or-

   b. Click on ALL to select all names on the list. (Note: This option may also be used when most names are to be selected. After all names are highlighted, click on each name to be deselected.)

      -or-

   c. Click on the ALL ACTIVE to include all names that are active.

      -or-

   d. Click on ALL INACTIVE to include all inactive names.

Note
If "All" advisors are included in the report, each advisor's schedule will be displayed on a separate sheet of paper.

7. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

8. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

9. In the Options panel,

   a. Click on HIDE EXTENDED CELLS to display only the starting time of each activity.

   b. Click on the EXCLUDE DEFAULT CODE check box if you do not want the report to include time slots that contain the Default Master Schedule Code.

      Hint
      The EXCLUDE DEFAULT CODE option is useful when time increments are set for less than 30 minutes, which may cause the report to extend beyond a single page.

   c. Click on SUPPRESS ID, if desired.

10. Preview or print the report. (See "View, Print and Export Reports" in Section 40.)

11. Click on CLOSE, or if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the DAILY REPORT, landscape version, with ID's suppressed and EXCLUDE DEFAULT CODE selected.

Daily Report

James Buchanan - Monday, May 09, 2011

Time	ID	Name/Description	Phone No.	Reason Code(s) and Comments
8:00 AM		Drop-in Appointment		
8:30 AM	******	DOMINGUEZ, ROBERTO	(415) 432-1613	SEP
9:00 AM	******	PHAM, TOMMY	(650) 712-8590	TRANSFER – CSU Long Beach or San Diego
9:30 AM		Available Appointment		
10:00 AM		Meeting		Weekly Staff Meeting – Bailey Hall, Room 107
11:00 AM	******	SMITH, JOHN	(415) 123-4567	SEP
11:30 AM		Available Appointment		
12:00 PM		Lunch		
12:30 PM		Lunch		
1:00 PM	******	INDIGO, IRIS	(415) 565-7585	GENERAL ADV, SEP
1:30 PM	******	TAN, THOMAS	(650) 852-1826	ED PLAN
2:00 PM	******	GOLD, GARY	(415) 415-9165	ACADEMIC
2:30 PM		Prep Time		
3:00 PM		Class		Psychology 1A- Jones Hall, Room 212
4:00 PM		Class		
4:30 PM		Prep Time		

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Here is an example of the DAILY REPORT, portrait version, with ID's suppressed and EXCLUDE DEFAULT CODE selected.

Daily Report

James Buchanan - Monday, May 09, 2011

Time	ID	Name/Description	Reason Code(s)	Phone No.
8:00 AM		Drop-in Appointment		
8:30 AM	******	DOMINGUEZ, ROBERTO	SEP	(415) 432-1613
9:00 AM	******	PHAM, TOMMY	TRANSFER	(650) 712-8590
9:30 AM		Available Appointment		
10:00 AM		Meeting		
11:00 AM	******	SMITH, JOHN	SEP	(415) 123-4567
11:30 AM		Available Appointment		
12:00 PM		Lunch		
12:30 PM		Lunch		
1:00 PM	******	INDIGO, IRIS	GENERAL ADV, SEP	(415) 565-7585
1:30 PM	******	TAN, THOMAS	ED PLAN	(650) 852-1826
2:00 PM	******	GOLD, GARY	ACADEMIC	(415) 415-9165
2:30 PM		Prep Time		
3:00 PM		Class		
4:00 PM		Class		
4:30 PM		Prep Time		

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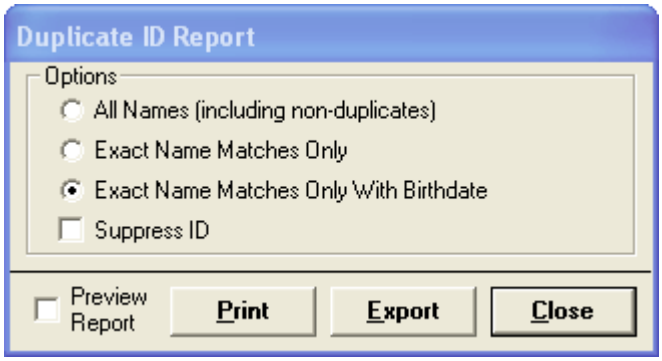
35.7 Duplicate ID Report

Use this report to identify students who are listed two or more times due to multiple ID entries caused by typographical errors or temporary IDs. The report enables the user to correct errors in the Students Database. This report displays, in alphabetical order by student name, the following data items: ID, Student Name, Birth Date, Home Phone, and Contact Phone.

Here is an example of the setup screen used to generate the DUPLICATE ID REPORT.



The following options appear on this screen:

- OPTIONS: Use to broaden or narrow the scope of the report.

  ALL NAMES (INCLUDING NON-DUPLICATES): Use to generate the broadest possible report that contains all student names, regardless of spelling, spacing, etc.

  EXACT NAME MATCHES ONLY: Use to generate a report that is narrower in scope and will display only those names that match to the letter.

  EXACT NAME MATCHES ONLY WITH BIRTH DATE: Use to generate a report that displays only those names that match to the letter and that have matching birth dates.

  SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.

- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- CLOSE: Use to exit the screen.

35.7.1 Set-Up the Duplicate ID Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.

2. Click on REPORTS on the SARS·REPORTS menu.

3. Click on DUPLICATE ID REPORT to display the setup screen.

4. Click on ALL NAMES to generate a report that contains all student names.

   -or-

   Click on EXACT NAME MATCHES ONLY to generate a report that contains only those student names that are spelled exactly the same. For example, “Smith, John” will be a match only for another listing that is spelled “Smith, John”. “Smith,John” or “John Smith” would not be considered a match.

   -or-

   Click on EXACT NAME MATCHES ONLY WITH BIRTHDATE to generate the EXACT NAME MATCHES ONLY report (as described above), but with only those names that have matching birth dates.

5. Click on SUPPRESS ID, if desired.

6. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40.)

Here is an example of the DUPLICATE ID REPORT (EXACT NAME MATCHES ONLY WITH BIRTHDATE).

Duplicate ID Report

Exact Name Matches Only With Birthdate

ID	Student Name	Birth Date	Home Phone	Contact Phone
34-668901	CHEN, QUAN	08/14/1977	(415) 702-3883	(415) 456-7944
345678901	CHEN, QUAN	08/14/1977	(415) 702-3883	(415) 456-7944
345678910	CHEN, QUAN	08/14/1977	(415) 702-3883	(415) 456-7944
456788012	CIMINSKI, DIANE	08/19/1977		(415) 093-4777
456789012	CIMINSKI, DIANE	08/19/1977		(415) 093-4777
789012345	COUSSA, CATHERINE	07/17/1972	(510) 658-1265	(415) 555-6666
789013245	COUSSA, CATHERINE	07/17/1972	(510) 658-1265	(415) 555-6666
789013345	COUSSA, CATHERINE	07/17/1972	(510) 658-1265	(415) 555-6666
799012345	COUSSA, CATHERINE	07/17/1972	(510) 658-1265	(415) 555-6666
890123456	DOMINIQUE, DANIELLE	09/12/1946	(650) 920-3664	(415) 565-7585
890124456	DOMINIQUE, DANIELLE	09/12/1946	(650) 920-3664	(415) 565-7585
765432109	ELJAJ, JAMIL	11/01/1977		(415) 475-8956
7664-2190	ELJAJ, JAMIL	11/01/1977		(415) 475-8956
432098765	FONESCA, FRANK	02/17/1974		(510) 489-7784
421098765	FONESCA, FRANK	02/17/1974		(510) 489-7784
650331254	MARTINEZ, VIRGINIA	01/25/1979	(510) 383-2663	(415) 727-3747
777777777	MARTINEZ, VIRGINIA	01/25/1979	(510) 383-2663	(415) 727-3747
051515151	PARK, PETER	01/05/1956		(415) 532-7851
151515151	PARK, PETER	01/05/1956		(415) 532-7851
155155151	PARK, PETER	01/05/1956		(415) 532-7851
555515151	PARK, PETER	01/05/1956		(415) 532-7851
161616161	PETERS, PAUL	08/15/1962	(415) 388-7620	(510) 275-3165
161616661	PETERS, PAUL	08/15/1962	(415) 388-7620	(510) 275-3165
161666161	PETERS, PAUL	08/15/1962	(415) 388-7620	(510) 275-3165
529543761	ROJAS, FRANCISCO	08/29/1977		(510) 929-3949
888888888	ROJAS, FRANCISCO	08/29/1977		(510) 929-3949
SG0000050	ROJAS, FRANCISCO	08/29/1977		(510) 929-3949
111111111	SMITH, JOHN	03/06/1964		(415) 456-7890
568627665	SMITH, JOHN	03/06/1964	(510) 488-9988	(650) 123-9876
2222-3333	THOMAS, TED	03/01/1968		(650) 953-6865
333223333	THOMAS, TED	03/01/1968		(650) 953-6865
889898989	WANG, WILLIAM	06/03/1980		(415) 222-3334
989898989	WANG, WILLIAM	06/03/1980		(415) 222-3334

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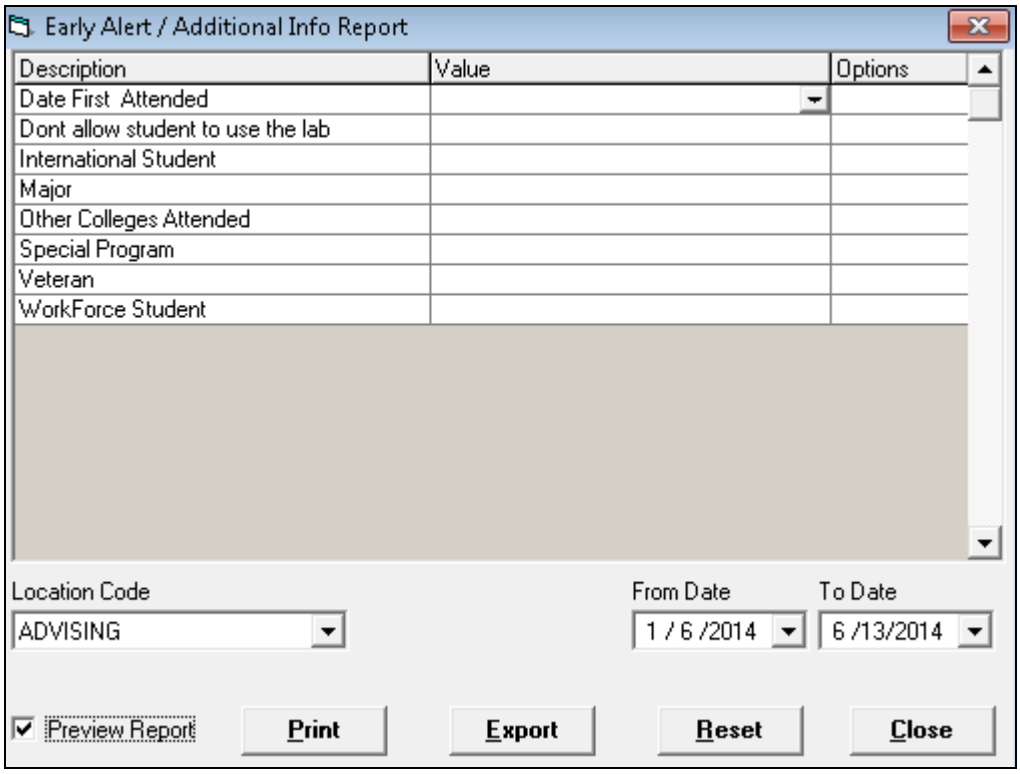
35.8 Early Alert / Additional Info Report

Use to obtain a printed list of students who have open Early Alerts for the selected Location and date range. The report displays, for all students that are in the SARS database who meet the selected criteria and date range, the student's ID, name, birth date, home phone and contact phone, as well as the total number of students meeting the selected criteria.

The report may be generated for all students who have open Early Alerts, in which case the Additional Information criteria will not be used. Or the report may be generated to filter for all students with open Early Alerts and who also meet the selected criteria as specified under the Additional Information Values and Options.

Here is an example of the setup screen used to generate the EARLY ALERTS/ADDITIONAL INFO REPORT.



The following options appear on this screen:

- DESCRIPTION: Used to hold the question that will provide more detailed information about the student.

- VALUE: Use, if information about the Description (question) is to be retrieved for the report, to enter or select the answer that is associated with the adjacent description (question). The value will be in the format of a Date, a Yes/No response, one or more responses to be selected from a List, or a Text response to be typed in the space provided.

- OPTIONS: Use in connection with any value that requires a Date or Text response. For a Date response, the user will be prompted to select => (greater than or equal to), = (equal to), or <= (less than or equal to). For a Text response, the user will be prompted to select = (equal to) or "Contains."
- LOCATION CODE: Use to select the Location to include in the report. The list will include all locations to which the user has access, including deleted locations.
- FROM DATE: Use when generating the "History for Each Student by Value," Detail or Summary format, to establish the first date of a date range on which to be reported.
- TO DATE: Use when generating the "History for Each Student by Value," Detail or Summary format, to establish the last date of a date range on which to be reported.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

35.8.1 Set-Up the Early Alert/Additional Info Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on Early Alert Reports, and then select Early Alert/Additional Info Report.
4. Click on LOCATION CODE ▼ and then select the Location for which this report will be generated. The list will include all locations to which the user has access, including deleted locations.
5. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
6. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

7. To generate a report showing all students who have open Early Alerts, do not select Values or Options for the Additional Information questions displayed. Simply click on Preview, Print or Export.

   -or-

8. To generate a report that is filtered to include only students meeting one or more Additional Information criteria and also have open Early Alerts, follow the steps below.

   a. Click within the space in the VALUE column adjacent to the description to be used in the report. If ▼ appears, click on ▼ and select from the available choices.

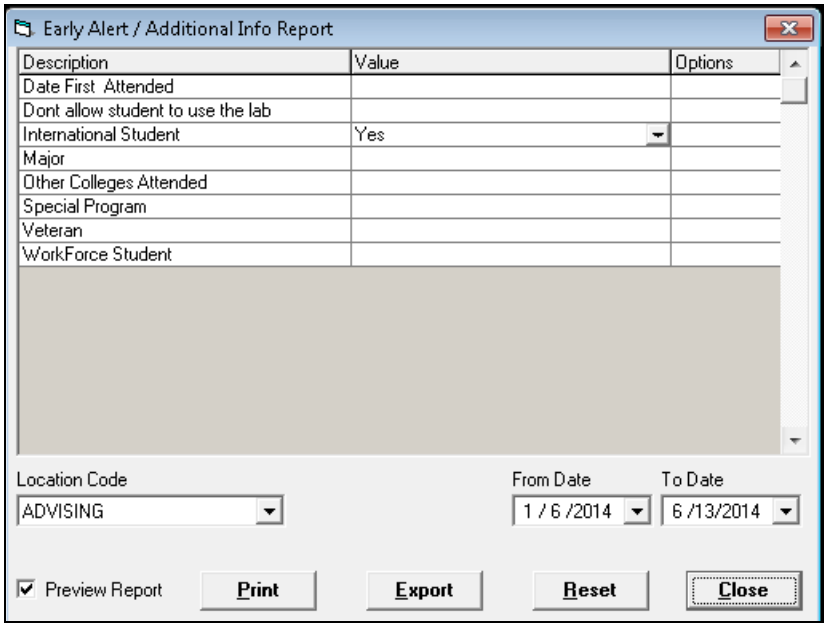
      i) If the value selected is a Date, click on VALUE ▼ and select the date using the date picker. You may also click on the OPTIONS field on the same line, and then select one of the following three options: => (greater than or equal to), = (equal to), or <= (less than or equal to).

      ii) If the value entered is a Text response, click on VALUE ▼ and then type in the desired text. You may also click on the OPTIONS field on the same line, and select one of the following two options: = (equal to) or "Contains."

      iii) If the value selected is Yes/No, click on VALUE ▼ and select either Yes or No from the menu. No options are available in the OPTIONS column.

      iv) If the value is a selection from a drop-down list (e.g., Major), click on VALUE ▼ and select the desired option. To select more than one option, click on VALUE ▼ and, while holding down the Control key, click on each selection to be included. They will be listed on the same line, separated by commas. No options are available in the OPTIONS column.

   b. Continue to select other values and options until all desired questions and answers have been selected. Here is an example of the setup screen with a single criterion (International Student = Yes) selected.



c. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40.)

9. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the EARLY ALERT/ADDITIONAL INFO REPORT.

Early Alert / Additional Info Report

Report Criteria: International Student

Student ID	Student Name	Home Phone	Contact Phone	eMail Address
99999999	BLACK, JOSIE		(415) 727-3747	
22222222	BLUE, BETTY		(415) 456-7944	
00000002	BROWN, BERNARD		(415) 214-6053	
77777777	GREENE, SUSAN	(510) 789-1265	(510) 489-7784	
00000003	GREY, GARSON	(650) 933-5756		
00000004	MAUVE, DOTTIE	(415) 646-6776		
55555555	ORANGE, OTTO	(510) 383-2766	(650) 667-7889 x 9	
88888888	PINK, PINKIE	(650) 734-5110		
66666666	PURPLE, PANSY		(415) 222-3334	
33333333	RED, FOXX	(650) 549-6546		
11111111	SMITH, JOHN	(510) 556-7676		
00000001	WHITE, WINNIE	(415) 556-3797		
44444444	YELLOW, YVETTE	(415) 093-4777		

Total Students Found: 13

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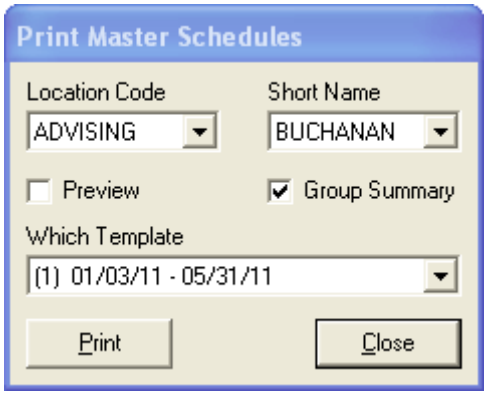
35.9 Master Schedule Report

Use this report to obtain a printout of one or more advisor's proposed master schedule(s). You may choose to include total hours and total occurrences for each SCHEDULE CODE GROUP. (To obtain a report showing an advisor's actual hours by activity, see "Schedule Code Summary Report" in Section 37.8.)

Here is an example of the setup screen used to generate the MASTER SCHEDULE REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- SHORT NAME: Use to select the Short Name of the advisor about whom the report will be generated or to select "ALL" to include all advisors.
- PREVIEW: Use to view the report on the screen without printing.
- GROUP SUMMARY: Use to obtain statistics on the total occurrences and number of hours for each SCHEDULE CODE GROUP.
- WHICH TEMPLATE: Use to identify which MASTER SCHEDULE to print.
- PRINT: Use to initiate printing of the report.
- CLOSE: Use to exit the screen.

35.9.1 Set-Up the Master Schedule Report for Viewing or Printing

1. Click on UTIL on the SARS·MENU.

2. Click on SYSTEM ADMINISTRATION.

3. Click on SHORT NAME MAINTENANCE.

4. Click on the desired Short Name.

5. Click on PRINT to display the setup screen.

6. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.

7. Click on SHORT NAME ▼ to display a list of advisor Short Names. Then select either ALL (to generate the report for all advisors) or a single Short Name (to generate the report for a specific advisor).

8. Click on the GROUP SUMMARY check box to include the group code summary statistics or leave the check box blank to exclude those statistics. (See "Group Codes" in Part II, Section 6.3.)

9. Click on WHICH TEMPLATE ▼ to display a list of master schedules. Then click either on ALL (to print all reports for the selected advisor) or on a selected MASTER SCHEDULE template (to only print that report).

   Note
   If you select ALL for ADVISOR, you are not allowed to select a specific template.

10. Preview or print report. (See "View, Print and Export Reports" in Section 40.)

Here is an example of the MASTER SCHEDULE REPORT in the GROUP SUMMARY mode.

Master Schedule Report

BUCHANAN - James Buchanan
01/03/2011 - 05/31/2011

Time	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM	DROPIN	DROPIN	DROPIN	PREP	DROPIN
8:30 AM	DROPIN	DROPIN	DROPIN	DROPIN	DROPIN
9:00 AM	DROPIN	DROPIN	DROPIN	DROPIN	DROPIN
9:30 AM	OPEN	PREP	OPEN	OPEN	OPEN
10:00 AM	MEET	OPEN	OPEN	OPEN	OPEN
10:30 AM	MEET	OPEN	OPEN	OPEN	OPEN
11:00 AM	MEET	OPEN	OPEN	OPEN	OPEN
11:30 AM	MEET	OPEN	OPEN	OPEN	OPEN
12:00 PM	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH
12:30 PM	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH
1:00 PM	OPEN	OPEN	OPEN	OPEN	OPEN
1:30 PM	OPEN	OPEN	OPEN	OPEN	OPEN
2:00 PM	OPEN	OPEN	OPEN	OPEN	OPEN
2:30 PM	PREP	OPEN	PREP	OPEN	OPEN
3:00 PM	CLASS	OPEN	CLASS	OPEN	CLASS
3:30 PM	CLASS	OPEN	CLASS	OPEN	CLASS
4:00 PM	DROPIN	DROPIN	DROPIN	DROPIN	DROPIN
4:30 PM	DROPIN	DROPIN	DROPIN	DROPIN	PREP
5:00 PM					
5:30 PM					
6:00 PM					
6:30 PM					
7:00 PM					
7:30 PM					

GROUP	Count	Hours
Administrative Time	9	04.50
Personal Time	10	05.00
Student Contact Time	71	35.50
Group Total:		45.00

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Location: ADVISING

35.10 No Show Report

Use this report to obtain a list of students who did not show up for their scheduled appointments. The list includes the student's ID, name, date and time of the appointment, the advisor's abbreviated name, the schedule code for the appointment, and the student's e-mail and phone number. It is displayed alphabetically by student name, and then chronologically, if a student's name appears more than once.

Here is an example of the setup screen used to generate the NO SHOW REPORT.

The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations. The report may be printed for only one Location at a time.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- SHORT NAME (* - INACTIVE): Use to select the Short Name of the advisor about whom the report will be generated.
- NUMBER OF NO SHOWS: Use to specify whether the report should include no shows (1 or more) or be limited to 2, 3, 4, or 5 or more no shows.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich

Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

35.10.1 Set-Up the No Show Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on NO SHOW REPORT to display the setup screen.
4. Click on LOCATION CODE▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
6. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
7. Click on SHORT NAME (* - INACTIVE)▼ and then click on the Advisor for whom the report will be generated.

   -or-

   Click on ALL to include all advisors.

   -or-

   Click on ALL – ACTIVE to include all active advisors.

   -or-

   Click on ALL – INACTIVE to include all inactive advisors.
8. Click on NUMBER OF NO SHOWS ▼ to display a list of choices. Click on the number of No Shows.
9. Click on SUPPRESS ID, if desired.
10. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40.)
11. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the NO SHOW REPORT.

No Show Report

Number of No Shows: 2 or More
2/6/2011 - 4/15/2011
Short Name: ALL

ID	Student's Name	Date	Time	Short Name	Schedule Code	EMail	Phone
2222222	BROWN, ROBERT	2/7/2011	10:00 AM	ADAMS	ORIENT	rbro@nbcc.edu	(510) 555-1212
2222222	BROWN, ROBERT	4/4/2011	10:00 AM	ADAMS	ORIENT	rbro@nbcc.edu	(510) 555-1212
0000009	BURGUNDY, BERT	2/11/2011	3:00 PM	POLK	ORIENT	bbur@nbcc.edu	(415) 992-9777
0000009	BURGUNDY, BERT	2/18/2011	3:00 PM	ADAMS	ORIENT	bbur@nbcc.edu	(415) 992-9777
0000009	BURGUNDY, BERT	2/25/2011	28:00 PM	ADAMS	ORIENT	bbur@nbcc.edu	(415) 992-9777
0000009	BURGUNDY, BERT	3/17/2011	2:30 PM	ADAMS	ORIENT	bbur@nbcc.edu	(415) 992-9777
0000001	INDIGO, IRIS	3/30/2011	9:00 AM	ROOSEVT	OPEN		(415) 555-5555
0000001	INDIGO, IRIS	4/8/2011	9:00 AM	ROOSEVY	OPEN		(415) 555-5555
0000003	PLUM, PAUL	2/10/2011	3:00 PM	ADAMS	WRKSHP	plum@aol.com	
0000003	PLUM, PAUL	2/18/2011	3:00 PM	ADAMS	WRKSHP	plum@aol.com	
0000006	SALMON, SALLY	2/10/2011	1:30 PM	LINCOLN	OPEN	salmon@mcn.org	(415) 222-2222
0000006	SALMON, SALLY	2/11/2011	9:30 AM	POLK	OPEN	salmon@mcn.org	(415) 222-2222
0000006	SALMON, SALLY	2/18/2011	7:30 AM	POLK	OPEN	salmon@mcn.org	(415) 222-2222
0000006	SALMON, SALLY	2/25/2011	8:30 AM	POLK	OPEN	salmon@mcn.org	(415) 222-2222
0000006	SALMON, SALLY	3/30/2011	2:00 PM	POLK	OPEN	salmon@mcn.org	(415) 222-2222
0000006	SALMON, SALLY	4/1/2011	1:00 PM	POLK	OPEN	salmon@mcn.org	(415) 222-2222
0000006	SALMON, SALLY	4/4/2011	11:30 AM	POLK	OPEN	salmon@mcn.org	(415) 222-2222
0000002	TAN, THOMAS	2/11/2011	6:00 PM	ROOSEVT	OPEN	ttan@nbcc.edu	
0000002	TAN. THOMAS	2/25/2011	9:00 AM	POLK	OPEN	ttan@nbcc.edu	
0000002	TAN, THOMAS	4/6/2011	10:30 AM	JACKSON	OPEN	ttan@nbcc.edu	
0000002	TAN, THOMAS	4/8/2011	7:30 AM	JACKSON	OPEN	ttan@nbcc.edu	
0000002	TAN, THOMAS	4/11/2011	1:00 PM	LINCOLN	OPEN	ttan@nbcc.edu	

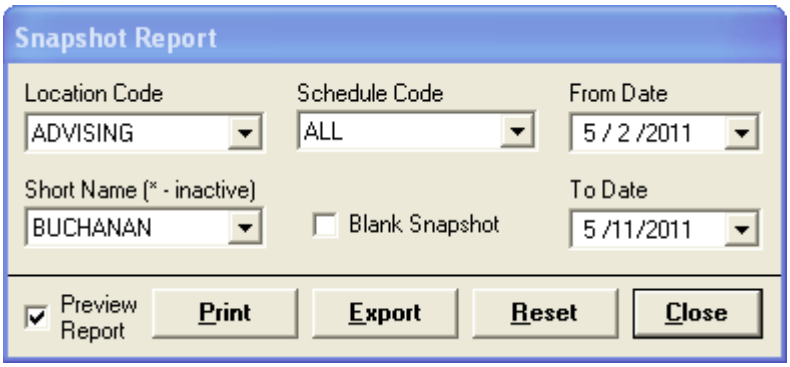
***Total number of No Shows: 22

35.11 Snapshot Report

Use this report to obtain a snapshot of an individual advisor's schedule for multiple dates. The report displays the date, day of the week, and time of each scheduled activity.

The SNAPSHOT REPORT is also available from MY GRID.

Here is an example of the setup screen used to generate the SNAPSHOT REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- SHORT NAME (* - INACTIVE): Use to select the Short Name of the advisor about whom the report will be generated.
- SCHEDULE CODE: Use to select one or more Schedule Codes to be included in the report.
- BLANK SNAPSHOT: Use to generate a Snapshot Report format that displays appointment times but is otherwise blank for use in drafting a week-long master schedule by hand.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

35.11.1 Set-Up the Snapshot Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on SNAPSHOT REPORT to display the setup screen.
4. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on SHORT NAME (* = INACTIVE)▼ and then click on the Short Name of the advisor for whom the report will be generated.

   -or-

   Click on ALL to include all advisors.

   -or-

   Click on ALL – ACTIVE to include all active advisors.

   -or-

   Click on ALL – INACTIVE to include all inactive advisors.
6. Click on SCHEDULE CODE ▼ to display a list of Schedule Codes. Then select the code to be included in the report, or select "ALL". Time slots that do not contain a selected Schedule Code will not be shown on the report.
7. To print a blank report containing the selected time frame, make the FROM DATE and TO DATE values the same, then click on BLANK SNAPSHOT.
8. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
9. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
10. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40.)
11. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the SNAPSHOT REPORT.

Snapshot Report

Short Name: BUCHANAN

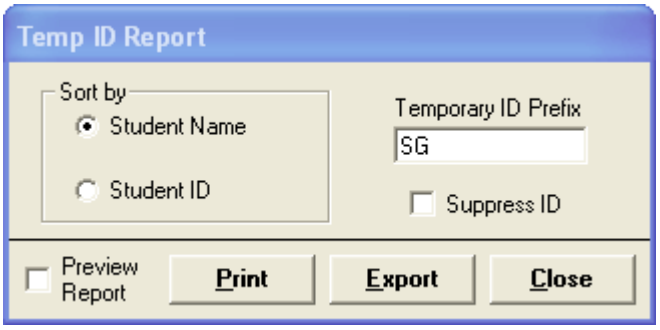
TIMES	5/2/2011 Monday	5/3/2011 Tuesday	5/4/2011 Wednesday	5/5/2011 Thursday	5/6/2011 Friday	5/9/2011 Monday	5/10/2011 Tuesday	5/11/2011 Wednesday
8:00 AM	BOOKED	DROPIN	OPEN	DROPIN	DROPIN	CLOSED	CONF	OPEN
8:30 AM	BOOKED	DROPIN	BOOKED	DROPIN	DROPIN	CLOSED	CONF	OPEN
9:00 AM	PREP	DROPIN	BOOKED	DROPIN	BOOKED	CLOSED	CONF	OPEN
9:30 AM	ORIENT	DROPIN	BOOKED	DROPIN	****	CLOSED	CONF	OPEN
10:00 AM	OPEN	MTG	BOOKED	DROPIN	DROPIN	CLOSED	CONF	BOOKED
10:30 AM	OPEN	MTG	BOOKED	DROPIN	DROPIN	CLOSED	CONF	BOOKED
11:00 AM	OPEM	MTG	OPEN	LUNCH	LUNCH	CLOSED	CONF	OPEN
11:30 AM	PREP	MTG	BOOKED	LUNCH	LUNCH	CLOSED	CONF	BOOKED
12:00 PM	LUNCH	BOOKED	OPEN	OPEN	BOOKED	CLOSED	CONF	OPEN
12:30 PM	LUNCH	OPEN	LUNCH	OPEN	BOOKED	CLOSED	CONF	LUNCH
1:00 PM	DROPIN	BOOKED	PREP	PREP	PREP	CLOSED	CONF	PREP
1:30 PM	DROPIN	DROPIN	DROPIN	DROPIN	DROPIN	CLOSED	CONF	DROPIN
2:00 PM	DROPIN	DROPIN	DROPIN	DROPIN	DROPIN	CLOSED	CONF	DROPIN
2:30 PM	DROPIN	BOOKED	OPEN	BOOKED	OPEN	CLOSED	CONF	OPEN
3:00 PM	DROPIN	BOOKED	BOOKED	OPEN	OPEN	CLOSED	CONF	OPEN
3:30 PM	DROPIN	BOOKED	OPEN	BOOKED	OPEN	CLOSED	CONF	OPEN
4:00 PM	////	////	////	////	////	CLOSED	////	////
4:30 PM	////	////	////	////	////	CLOSED	////	////
5:00 PM	////	////	////	////	////	CLOSED	////	////
5:30 PM	////	////	////	////	////	CLOSED	////	////
6:00 PM	////	////	////	////	////	CLOSED	////	////
6:30 PM	////	////	////	////	////	CLOSED	////	////
7:00 PM	////	////	////	////	////	CLOSED	////	////
7:30 PM	////	////	////	////	////	CLOSED	////	////

Printed 5/12/2011 10:59:28 AM Location: ADVISING

35.12 Temp ID Report

Use this report to obtain a list of students who have been assigned temporary identifiers in lieu of official ID's. Each line of the report displays the ID, student name, birth date, home phone and contact phone.

Here is an example of the setup screen used to generate TEMP ID REPORT.



The following options appear on this screen:

- SORT BY: Use to control how the information is grouped on the TEMP ID REPORT.

  STUDENT NAME: Use to sort the report alphabetically by student name.

  STUDENT ID: Use to sort the report numerically by identifier.

- TEMPORARY ID PREFIX: [Required] Use to enter the code used by the school to designate a temporary identifier. The default provided in SARS·GRID is "SG." Warning: If this field is left blank, all temporary and official ID prefixes will be generated for the report.

- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.

- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- CLOSE: Use to exit the screen.

35.12.1 Set-Up the Temp ID Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on TEMP ID REPORT to display the setup screen.
4. In the SORT BY field, click on either STUDENT NAME or STUDENT ID.
5. In the TEMPORARY ID PREFIX field, enter the character(s) used by the school to designate a temporary identifier.
6. Click on SUPPRESS ID, if desired.
7. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40.)

Here is an example of the TEMP ID REPORT, sorted by Student Name.

Temp ID Report

Sorted by Student Name

ID	Student Name	Birth Date	Home Phone	Contact Phone
SG0000009	BURGANDY, BERT	9/9/1979	(510) 339-6755	(415) 556-81111 x14
SG0000004	GOLD, GARY	4/1/1984	(415) 555-6123	(415) 555-6666
SG0000006	GREEN, GEOGE	4/4/19184	(415) 434-3434	
SG0000002	INDIGO, IRIS	12/25/1985	(415) 651-3762	(415) 388-2111 x23
SG0000005	JACKSON, JACK	1/1/1991	(415) 767-9954	(415) 781-4444 x345
SG0000001	JOHNSON, JILL	1/1/1981		
SG0000003	NORTON, PETER	6/16/1988	(510) 228-0011	
SG0000007	PLUM, PAUL	4/14/1984	(925) 338-7116	
SG0000010	SMITH, GEORGE	3/27/1989	(408) 276-4532	
SG0000008	TURQUOISE, TERRANCE	7/4/1985	(510) 242-7855	
SG0000006	YELLOW, YVONNE	8/8/1977	(415) 626-3646	(510) 760-3000

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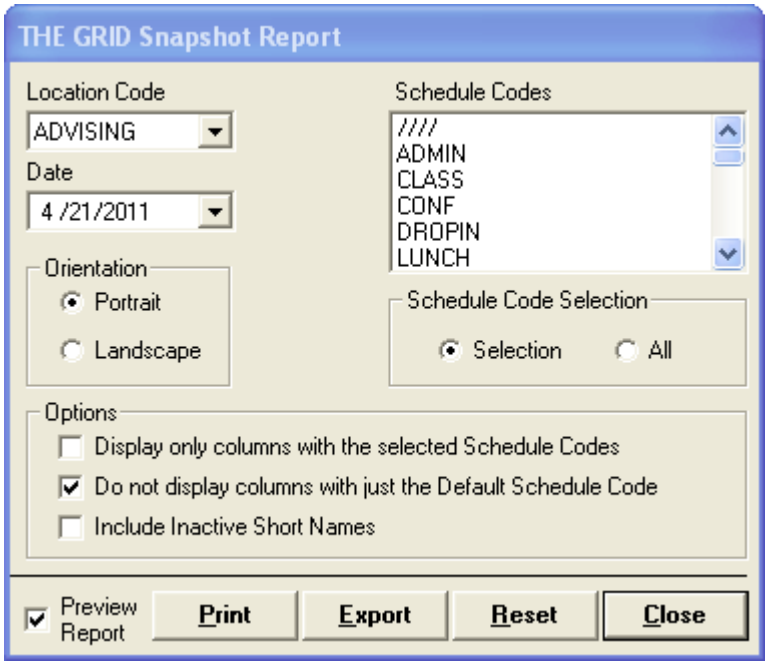
35.13 THE GRID Snapshot Report

Use this report to obtain a snapshot of THE GRID for all advisors for a single date.

Here is an example of the setup screen used to generate THE GRID SNAPSHOT REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- DATE: Use to select the date on which to be reported.
- ORIENTATION: Use to control whether information on the report will be displayed using a vertical (PORTRAIT) or horizontal (LANDSCAPE) page orientation.

  PORTRAIT: Use to orient a report vertically on a page.

  LANDSCAPE: Use to orient a report horizontally on a page.
- SCHEDULE CODES: Use to select the desired Schedule Codes to be included in the report.

  SCHEDULE CODE SELECTION:

  SELECTION: Use to include only the highlighted Schedule Codes in the report.

  ALL: Use to include all Schedule Codes in the report.
- OPTIONS:

DISPLAY ONLY COLUMNS WITH THE SELECTED SCHEDULE CODES:	Use to generate a report that only displays columns containing the selected schedule codes.
DO NOT DISPLAY COLUMNS WITH JUST THE DEFAULT SCHEDULE CODE:	Use to exclude columns containing only the default Schedule Code.
INCLUDE INACTIVE SHORT NAMES:	Use to include advisors who are inactive in the report.

• PREVIEW REPORT:	Use to display a report on the screen prior to or in lieu of printing.
• PRINT:	Use to initiate printing of the report.
• EXPORT:	Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
• RESET:	Use to restore all of the report set-up screen selections to the initial defaults.
• CLOSE:	Use to exit the screen.

35.13.1 Set-Up THE GRID Snapshot Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.

2. Click on REPORTS on the SARS·REPORTS menu.

3. Click on THE GRID SNAPSHOT REPORT to display the setup screen.

4. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.

5. Click on the DATE field and type in the date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)

6. In the ORIENTATION panel, click on either PORTRAIT or LANDSCAPE page orientation.

   PORTRAIT displays up to 8 columns of advisor names.
   LANDSCAPE displays up to 12 columns of advisor names.

7. In the SCHEDULE CODE SELECTION panel,

   a. Click on Selection and then highlight the Schedule Codes from the list above to be included in the report. If one or more is selected, THE GRID SNAPSHOT REPORT displays only the selected code(s), leaving blank those cells that contain other codes. For example, select only the Schedule Code DROPIN to obtain a total picture at one glance of coverage for Drop-In students.

-or-

b. Click on ALL to include all Schedule Codes. This will display all advisors' columns as displayed on THE GRID, regardless of Schedule Code.

Hint
To exclude any advisors who are off duty, click on ALL and also click on DO NOT DISPLAY COLUMN WITH JUST THE DEFAULT SCHEDULE CODE. See step 8, below.

8. [Optional] In the OPTIONS panel,

   a. To exclude all columns that contain de-selected Schedule Codes, click on DISPLAY ONLY COLUMNS WITH THE SELECTED SCHEDULE CODES. This option will generate a report that contains only the desired Schedule Code(s).

   b. To suppress columns that do not contain any schedule information, click on DO NOT DISPLAY COLUMNS WITH JUST THE DEFAULT SCHEDULE CODE.

   c. To include both active and inactive advisors in the report, click on INCLUDE INACTIVE SHORT NAMES.

9. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40.)

10. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of THE GRID SNAPSHOT REPORT.

THE GRID Snapshot Report

Thursday, April 21, 2011

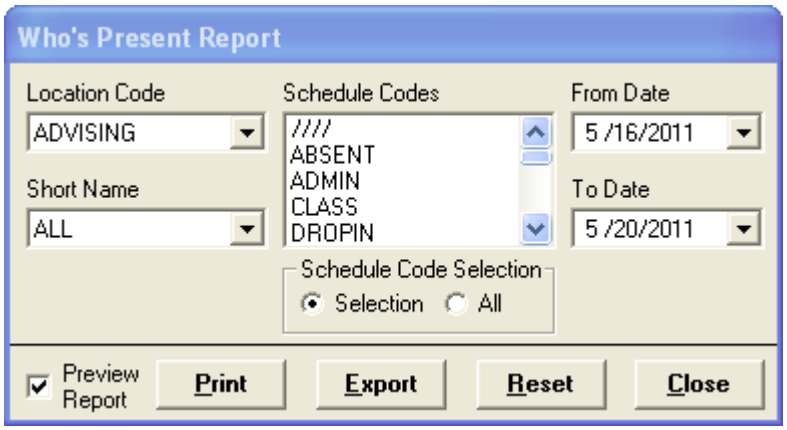
TIMES	ADAMS	BUCHANAN	LINCOLN	MADISON	PIERCE	POLK	REESE	ROOSEVT
8:00 AM	////	////	PREP	////	////	PREP	DROPIN	PREP
8:30 AM	DROPIN	////	TEST	////	////	CLASS	BOOKED	PREP
9:00 AM	DROPIN	////	TEST	////	////	CLASS	BOOKED	CLASS
9:30 AM	DROPIN	////	TEST	////	////	BOOKED	OPEN	CLASS
10:00 AM	MEET	MEET	MEET	MEET	MEET	MEET	MEET	MEET
10:30 AM	MEET	MEET	MEET	MEET	MEET	MEET	MEET	MEET
11:00 AM	MEET	MEET	MEET	MEET	MEET	MEET	MEET	MEET
11:30 AM	MEET	MEET	MEET	MEET	MEET	MEET	MEET	MEET
12:00 PM	PREP	BOOKED	DROPIN	BOOKED	OPEN	LUNCH	LUNCH	LUNCH
12:30 PM	LUNCH	OPEN	DROPIN	OPEN	BOOKED	LUNCH	LUNCH	LUNCH
1:00 PM	LUNCH	DROPIN	LUNCH	PREP	DROPIN	BOOKED	BOOKED	OPEN
1:30 PM	ORIENT	DROPIN	LUNCH	LUNCH	DROPIN	BOOKED	BOOKED	OPEN
2:00 PM	ORIENT	DROPIN	DROPIN	LUNCH	LUNCH	OPEN	BOOKED	OPEN
2:30 PM	ORIENT	LUNCH	BOOKED	BOOKED	LUNCH	DROPIN	PREP	OPEN
3:00 PM	ORIENT	LUNCH	BOOKED	BOOKED	PREP	DROPIN	CLASS	PREP
3:30 PM	BOOKED	PREP	BOOKED	OPEN	OPEN	DROPIN	CLASS	OPEN
4:00 PM	OPEN	BOOKED	OPEN	BOOKED	OPEN	BOOKED	DROPIN	////
4:30 PM	BOOKED	OPEN	////	BOOKED	BOOKED	////	DROPIN	////
5:00 PM	OPEN	BOOKED	////	DROPIN	OPEN	////	////	////
5:30 PM	////	BOOKED	////	DROPIN	BOOKED	////	////	////
6:00 PM	////	BOOKED	////	DROPIN	OPEN	////	////	////
6:30 PM	////	BOOKED	////	DROPIN	BOOKED	////	////	////
7:00 PM	////	OPEN	////	////	DROPIN	////	////	////
7:30 PM	////	OPEN	////	////	DROPIN	////	////	////

Printed 5/16/2011 10:59:28 AM Location: ADVISING

35.14 Who's Present Report

Use this report to obtain a list of college representatives who have periodic appointments with potential transfer students so that arrangements for office space may be made. This report may also be used to obtain a list of all advisors who will be present on selected dates, or to view a list of part-time advisors who will be present. The advisors to be included on the list will be determined by the Schedule Code(s) that are selected. The report also displays the total number of "days" worked by the advisor(s). The presence of even one cell that has been filled by a selected code counts as a "day worked."

Here is an example of the setup screen used to generate the WHO'S PRESENT REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department for which the report is to be generated. The list will include all locations to which the user has access, including deleted locations.
- SHORT NAME: Use to select the Short Name of the advisor about whom the report will be generated.
- SCHEDULE CODES: Use to select one of more codes, as desired. For example, selecting all appointment allowable Schedule Codes will generate a report that includes any advisor whose schedule has at least one of the selected codes.

  SCHEDULE CODE SELECTION:

  SELECTION: Use to include only the highlighted Schedule Codes in the report.

  ALL: Use to specify that all Schedule Codes should be included in the report.
- FROM DATE: Use to select the earliest date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- PREVIEW REPORT: Use to display the report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

35.14.1 Set-Up the Who's Present Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on WHO'S PRESENT REPORT to display the setup screen.
4. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on SHORT NAME ▼ and then click on the Short Name of the advisor for whom the report will be generated.

   -or-

   Click on ALL to include all advisors.

   -or-

   Click on ALL – ACTIVE to include all active advisors.

   -or-

   Click on ALL – INACTIVE to include all inactive advisors.
6. In the SCHEDULE CODE SELECTION panel, click on SELECTION and then highlight one or more Schedule Codes from the list above to include only the desired Schedule Codes, or click on ALL to include all Schedule Codes in the report.
7. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
8. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
9. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40.)
10. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the WHO'S PRESENT REPORT.

Who's Present Report

5/16/2011 - 5/20/2011

Date	Name
5/16/2011	ABRAHAM LINCOLN
	FRANKLIN PIERCE
	JAMES BUCHANAN
	JAMES K. POLK
	JAMES MADISON
	JAMES MONROE
	JOHN ADAMS
5/17/2011	ABRAHAM LINCOLN
	FRANKLIN PIERCE
	JAMES MONROE
5/18/2011	ABRAHAM LINCOLN
	FRANKLIN PIERCE
	JAMES BUCHANAN
	JAMES K. POLK
	JAMES MADISON
5/19/2011	ABRAHAM LINCOLN
	FRANKLIN PIERCE
	JAMES BUCHANAN
	JAMES K. POLK
	JAMES MADISON
	JAMES MONROE
	JOHN ADAMS
5/20/2011	ABRAHAM LINCOLN
	FRANKLIN PIERCE
	JAMES BUCHANAN
	JAMES K. POLK
	JAMES MADISON
	JAMES MONROE
	JOHN ADAMS

Printed 5/16/2011 10:59:28 AM Location: ADVISING

SECTION 36 – eADVISING REPORTS

36.0 Overview

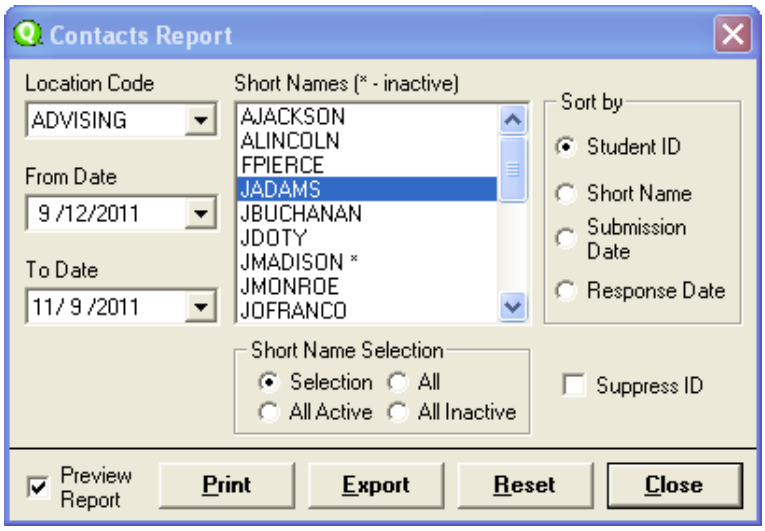
This Section covers the standardized eAdvising reports, all of which are available from SARS·REPORTS.

The list that follows is a table of contents for Section 36.

36.1 Contacts Report

Use this report to obtain a printout of all eAdvising contacts for a selected Location and date range for one or more advisors. The report may be sorted by Student ID, by Short Name, by Submitted Date, or by Response Date.

Here is an example of the setup screen used to generate the eADVISING CONTACTS REPORT.



The options are:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.

- FROM DATE: Use to establish the first date of a date range on which to be reported.

- TO DATE: Use to establish the last date of a date range on which to be reported.
- SHORT NAMES (* - INACTIVE): Use to select the Short Name(s) of the advisor(s) about whom the report will be generated.

  SHORT NAME SELECTION:

  SELECTION: Use to include only the highlighted Short Names.

  ALL: Use to select all active and inactive advisors for inclusion in the report. This option may also be used if most of the Short Names will be selected; it will highlight all Short Names, and then the names to be excluded may be deselected by clicking on them.

  ALL ACTIVE: Use to select All Active Short Names for the report, excluding any inactive Short Names.

  ALL INACTIVE: Use to select only the inactive Short Names for the report, excluding any active Short Names.
- SORT BY: Use to control how the information is grouped on the report.

  STUDENT ID: Use to sort the report by students' identifiers.

  SHORT NAME: Use to sort the report by the SHORT NAME of the advisor.

  SUBMISSION DATE: Use to sort the report by the date that the student submitted the question.

  RESPONSE DATE: Use to sort the report by the date on which advisors responded to the questions.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student IDs on a printed report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

36.1.1 Set-Up the Contacts Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.

2. Click on REPORTS on the SARS·REPORTS menu.

3. Click on eADVISING and then on CONTACTS REPORT to display the setup screen.

4. Click on LOCATION CODE▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.

5. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

6. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

7. Select the SHORT NAMES to be included in the report using one of the following options:

   a. Click on SELECTION in the Short Name Selection panel and then highlight each name to be included in the report.

      -or-

   b. Click on ALL to select all names on the list. (Note: This option may also be used when most names are to be selected. After all names are highlighted, click on each name to be deselected.)

      -or-

   c. Click on the ALL ACTIVE to include all names that are active.

      -or-

   d. Click on ALL INACTIVE to include all inactive names.

   Note
   If "All" advisors are included in the report, each advisor's schedule will be displayed on a separate sheet of paper.

8. In the SORT BY panel,

   a. Click on STUDENT ID to specify the order in which to sort the report information.

      -or-

   b. Click on SHORT NAME to sort the report alphabetically by Short Name.

      -or-

   c. Click on SUBMISSION DATE to sort the report chronologically by the date on which the students submitted their questions.

      or-

d. Click on RESPONSE DATE to sort the report chronologically by the date on which advisors responded to the questions.

9. Click on SUPPRESS ID, if desired.

10. Preview or print the report. (See “View, Print and Export Reports” in Section 40.)

11. Click on CLOSE, or if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the CONTACTS REPORT, sorted by Student ID.

Contacts Report

9/12/2012 to 11/9/2012
Sorted by Student ID

Student ID	Short Name	Student Submitted	First Viewed	Response Date/Time	Response Viewed	Follow-Up Question
3333333	JMADISON	11/08/2012 16:44	11/08/2012 16:44	11/08/2012 16:47	11/08/2012 16:47	Yes
3333333	JADAMS	10/30/2012 10:23	10/30/2012 10:24	10/30/2012 10:24	10/30/2012 10:24	No
3333333	JADAMS	10/30/2012 10:35	10/30/2012 10:35	10/30/2012 10:35	10/30/2012 10:35	Yes
3333333	JTYLER	11/08/2012 16:47	11/08/2012 16:48	11/08/2012 16:48	11/08/2012 16:48	No
3333333	ANDB	11/08/2012 16:51	11/08/2012 16:53	11/08/2012 16:53	11/08/2012 16:53	No
4444444	JADAMS	10/30/2012 14:57	10/30/2012 14:57	10/30/2012 14:58	10/30/2012 14:58	Yes
4444444	JADAMS	10/30/2012 14:58	10/30/2012 14:58	10/30/2012 14:59	10/30/2012 15:23	No
6666666	JADAMS	10/30/2012 11:09	10/30/2012 11:09	10/30/2012 11:09	10/30/2012 11:10	No
6666666	JADAMS	10/30/2012 10:43	10/30/2012 10:43	10/30/2012 10:43	10/30/2012 10:43	No
6666666	JADAMS	10/30/2012 10:44	10/30/2012 10:44	10/30/2012 10:45	10/30/2012 10:46	No
6666666	JADAMS	10/30/2012 10:46	10/30/2012 10:47	10/30/2012 10:47	10/30/2012 10:47	No

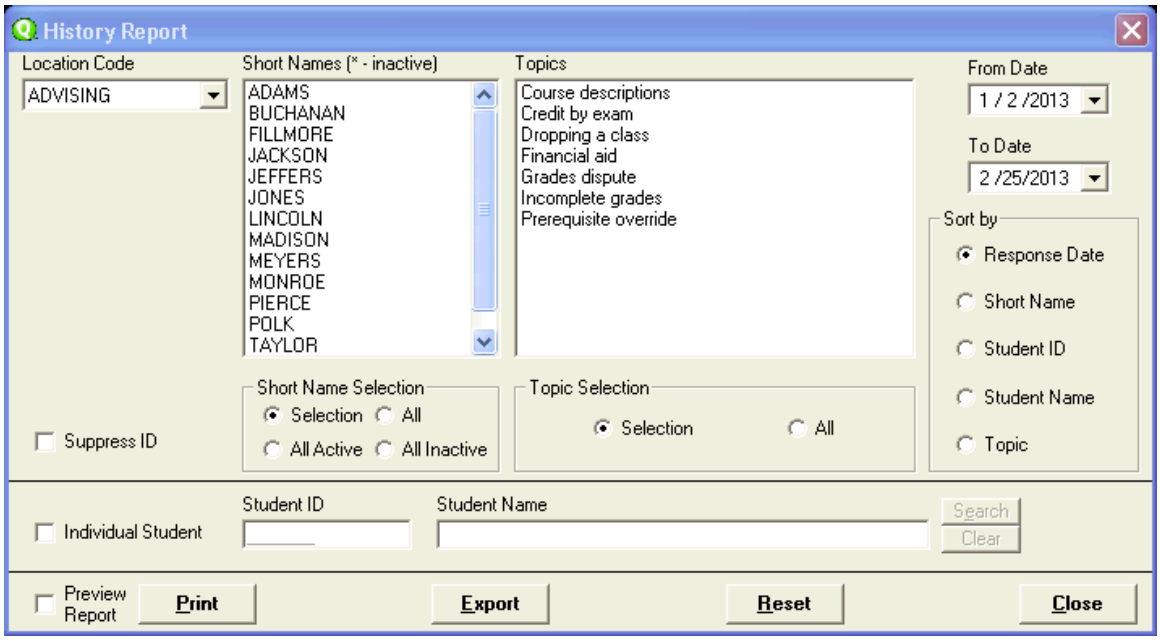
Total Unduplicated Students: 3 Total: 11

Date: 7/15/2013 2:20:21 PM Page: 1 Location: ADVISING

36.2 History Report

Use this report to obtain a printout of all eAdvising history for a selected Location and date range for one or more advisors and topics. The report may be sorted by Response Date, by Short Name, by Student ID, by Student Name, or by Topic. The report may also be generated for an individual student.

Here is an example of the setup screen used to generate the HISTORY REPORT.



The options are:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.

- SHORT NAMES (* - INACTIVE): Use to select the Short Name(s) of the advisor(s) about whom the report will be generated.

  SHORT NAME SELECTION:

  SELECTION: Use to include only the highlighted Short Names in the report.

  ALL: Use to select all active and inactive advisors for inclusion in the report. This option may also be used if most of the Short Names will be selected; it will highlight all Short Names, and then the names to be excluded may be deselected by clicking on them.

  ALL ACTIVE: Use to select All Active Short Names for the report, excluding any inactive Short Names.

  ALL INACTIVE: Use to select only the inactive Short Names for the report, excluding any active Short Names.

- TOPICS: Use to select the Topics about whom the report will be generated.

  TOPIC SELECTION:

  SELECTION: Use to include only the highlighted Topics in the report.

  ALL: Use to select all Topics for inclusion in the report. This option may also be used if most of the Topics will be selected; it will highlight all Topics, and then the topics to be excluded may be deselected by clicking on them.

- FROM DATE: Use to establish the first date of a date range on which to be reported.

- TO DATE: Use to establish the last date of a date range on which to be reported.

- SORT BY: Use to control how the information is grouped on the report.

  RESPONSE DATE: Use to sort the information listed on the report by the date on which advisors responded to the questions.

  SHORT NAME: Use to sort the information listed on the report by the SHORT NAME of the advisor.

  STUDENT ID: Use to sort the information listed on the report by students' identifiers.

  STUDENT NAME: Use to sort the information listed on the report by alphabetically by student name.

  TOPIC: Use to sort the information listed on the report alphabetically by topic.

- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student IDs on a printed report. This option is not available if sorting by STUDENT ID.

- INDIVIDUAL STUDENT: Use to generate the report for a single specified student.

  STUDENT ID: Use to enter the ID for the student.

  STUDENT NAME: Use to enter the name of the student if the Student ID is not known.

  SEARCH: Use to search for the student's ID by name.

  CLEAR: Use to clear the Student ID/Student Name fields.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

36.2.1 Set-Up the History Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on eADVISING and then on HISTORY REPORT to display the setup screen.
4. Click on LOCATION CODE▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Select the SHORT NAMES to be included in the report using one of the following options:
   a. Click on SELECTION in the Short Name Selection panel and then highlight each name to be included in the report.

      -or-

   b. Click on ALL to select all names on the list. (Note: This option may also be used when most names are to be selected. After all names are highlighted, click on each name to be deselected.)

      -or-

   c. Click on ALL ACTIVE to include all names that are active.

      -or-

   d. Click on ALL INACTIVE to include all inactive names.
6. Select the Topic(s) to be included in the report by clicking on one of the following options:
   a. Click on SELECTION in the Topic Selection panel and then highlight each topic to be included in the report.

      -or-

   b. Click on ALL to select all topics on the list. (Note: This option may also be used when most topics are to be selected. After all topics are highlighted, click on each topic to be deselected.)

7. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

8. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

9. In the SORT BY panel,

   a. Click on RESPONSE DATE to sort the report chronologically by the date on which advisors responded to the questions.

      -or-

   b. Click on SHORT NAME to sort the report alphabetically by Short Name

      -or-

   c. Click on STUDENT ID to sort the report by Student ID number.

      -or-

   d. Click on STUDENT NAME to sort the report alphabetically by Student Name.

      -or-

   e. Click on TOPIC to sort the report alphabetically by topic.

10. Click on SUPPRESS ID, if desired. Note that this option is not applicable if Sort by Student ID has been selected.

11. If the report is to be generated for a single student, click on INDIVIDUAL STUDENT and then enter the Student ID of the student. If the Student ID is not known, type the student's name in the Student Name field and then click on SEARCH.

    a. If no match is found, a notification message will be displayed.

    b. If a single match is found, the student's ID will be inserted.

    c. If more than one match is found, a list of all students with that name will appear (on the SEARCH RESULTS screen). Click on the name from the list and then on OK.

12. Preview or print the report. (See "View, Print and Export Reports" in Section 40.)

13. Click on CLOSE, or if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the History Report, sorted by Student ID:

History Report

1/2/2013 – 2/28/2013

Sorted by Student ID

Student ID	Student Name	Response Date	Short Name	Topic	Question	Response
1111111	SMITH, JOHN	01/04/2013	JADAMS	Credit by exam	Can I get credit…	See me to discuss.
2222222	BLUE, BETTY	01/11/2013	FPIERCE	Dropping a class	What is the last…	February 15, 2013
2222222	BLUE, BETTY	01/14/2013	FPIERCE	Prerequisite override	I don't need…	Make an appt to see me and.
3333333	RED, FOXX	01/20/2013	JADAMS	Grades dispute	I should have…	Let's discuss; make an appt.
4444444	YELLOW, YVETTE	02/21/2013	JMONROE	Dropping a class	Can I drop …	No; 2/15/13 was the last …
6666666	PURPLE, PANSY	01/30/2013	JADAMS	Dropping a class	What is the last…	February 15, 2013
7777777	GREENE, SAM	01/18/2013	JMONROE	Credit by exam	Can I get credit…	Maybe; need to see your…

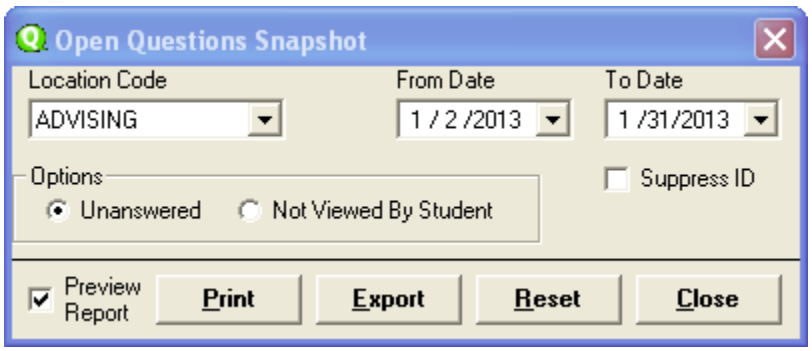
36.3 Open Questions Snapshot Report

Use this report to obtain a printout, for a selected Location and date range, of unanswered questions that have been submitted by students or responses that have not been viewed by students.

Two options are available. If the Unanswered option is selected, the report will display, for the selected date range, the Student ID, Student Name, Date and Time that the question was submitted, the subject of the question, and the text of the actual question. It will also display a total count of unduplicated students and a total count of questions.

If the Not Viewed By Student option is selected, the report will also include a column showing whether the question has been answered by an advisor.

Here is an example of the setup screen used to generate the OPEN QUESTIONS SNAPSHOT REPORT.



The available options are:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student IDs on a printed report.
- OPTIONS:
  - UNANSWERED: Use to generate a report showing all questions that have not yet been answered by an advisor.
  - NOT VIEWED BY STUDENT: Use to generate a report showing a combination of all answered questions that have not been read by the students, as well as all unanswered questions.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

36.3.1 Set-Up the Open Questions Snapshot Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on eADVISING REPORTS and then on OPEN QUESTIONS SNAPSHOT to display the setup screen.
4. Click on LOCATION CODE▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)
6. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
7. Click on SUPPRESS ID, if desired.
8. In the Options panel,
   a. Click on UNANSWERED to generate a report showing all questions that have not yet been answered by an advisor.

      -or-

   b. Click on NOT VIEWED BY STUDENT to generate a report showing a combination of all answered questions that have not been read by the students, as well as all unanswered questions.
9. Preview or print the report. (See “View, Print and Export Reports” in Section 40.)
10. Click on CLOSE, or if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the Open Questions Snapshot Report when the Unanswered option has been selected.

Open Questions Snapshot Report

1/2/2013 – 1/31/2013

Student ID	Student Name	Student Submitted	Subject	Question
1111111	SMITH, JOHN	01/18/13 7:53:30 AM	Credit by exam	Can I get credit for Psych 1A…
2222222	BLUE, BETTY	01/30/2013 4:37:22 PM	Grade disputes	I deserved a B+ in Chem 100…
2222222	BLUE, BETTY	01/3/2013 9:15:01 AM	Assessment testing	When is the next test date?
3333333	RED, FOXX	01/20/2013 11:32:02 AM	Dropping a class	What is the deadline for dropping..
4444444	YELLOW, YVETTE	02/21/2013 3:57:00 PM	Incomplete grades	How can I make up for my incomp
6666666	PURPLE, PANSY	01/30/2013 9:46:32 AM	Graduation requirements	What other courses do I need for...
7777777	GREENE, SAM	01/26/2013 2:04:56 PM	Grade disputes	Prof. Plum wasn't fair to me.

Total Unduplicated Students: 6 Total Questions: 7

Here is an example of the Open Questions Snapshot Report when the Not Viewed by Student option has been selected.

Open Questions Snapshot Report

1/2/2013 – 1/31/2013

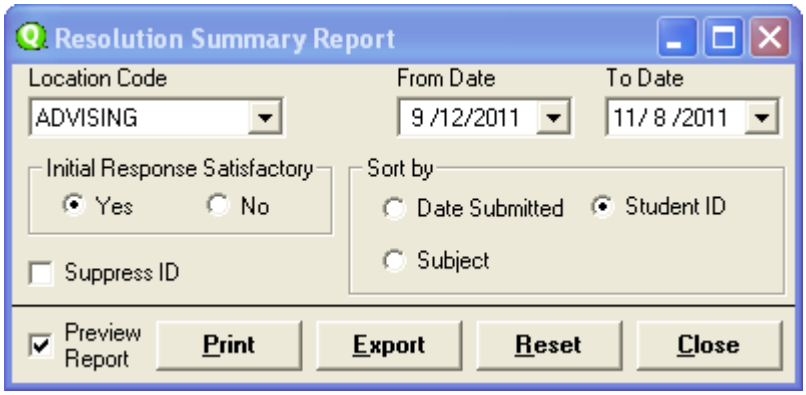
Student ID	Student Name	Student Submitted	Subject	Question	Response
1111111	SMITH, JOHN	1/18/13 7:53:30 AM	Credit by exam	Can I get credit for Psych 1A…	YES
2222222	BLUE, BETTY	1/30/2013 4:37:22 PM	Grade disputes	I deserved a B+ in Chem 100…	NO
2222222	BLUE, BETTY	1/3/2013 9:15:01 AM	Assessment testing	When is the next test date?	NO
3333333	RED, FOXX	01/20/2013 11:32:02 AM	Dropping a class	What is the deadline for dropping..	YES
4444444	YELLOW, YVETTE	02/21/2013 3:57:00 PM	Incomplete grades	How can I make up for my incomp	NO
6666666	PURPLE, PANSY	01/30/2013 9:46:32 AM	Graduation requirements	What other courses do I need for...	NO
7777777	GREENE, SAM	01/26/2013 2:04:56 PM	Grade disputes	Prof. Plum wasn't fair to me.	NO

Total Unduplicated Students: 6 Total Questions: 7

36.4 Resolution Summary Report

Use this report to obtain a printout of answered questions that students rated as either satisfactory (indicated by Yes) or unsatisfactory (indicated by No) for a selected Location and date range. The report may be sorted by Subject, Date Submitted, or Student ID.

Here is an example of the setup screen used to generate the RESOLUTION SUMMARY REPORT.



The options are:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- INITIAL RESPONSE SATISFACTORY: Use to select whether the report should be generated for Yes answers or No answers.

  YES: Use to display all questions that students reported as having been satisfactorily answered.

  NO: Use to display all questions that students reported as having been unsatisfactorily answered.
- SORT BY:

  DATE SUBMITTED: Use to sort the report chronologically by the date the question was submitted by the student.

  STUDENT ID: Use to sort the report by Student IDs.

  SUBJECT: Use to sort the report alphabetically by subject matter.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student IDs on a printed report.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

36.4.1 Set-Up the Resolution Summary Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on eADVISING REPORTS and then on RESOLUTION SUMMARY REPORT to display the setup screen.
4. Click on LOCATION CODE▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)
6. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
7. In the INITIAL RESPONSE SATISFACTORY panel, click on YES to display a report of all questions for which students indicated that the response received was satisfactory, or click on NO to display a report of all questions reported as unsatisfactory.
8. In the SORT BY panel, click on DATE SUBMITTED to sort the list chronologically by date, or on STUDENT ID to sort the list by student ID number, or on SUBJECT to sort the list alphabetically by subject matter.
9. Click on SUPPRESS ID, if desired.
10. Preview or print the report. (See “View, Print and Export Reports” in Section 40.)
11. Click on CLOSE, or if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the Resolution Summary Report.

Resolution Summary Report

9/12/2011 to 11/9/2011

Initial question addressed: YES. Sorted by Student ID

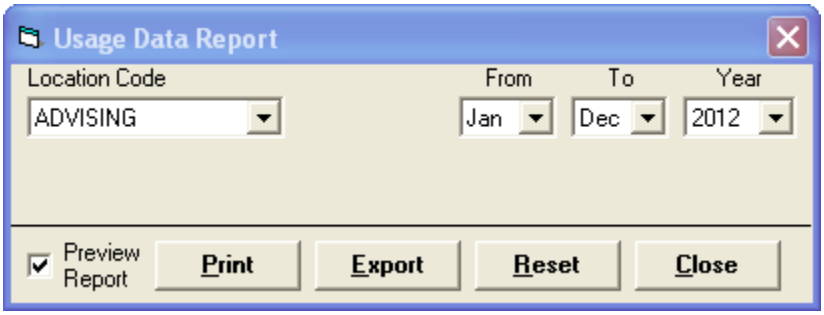
Student ID	Student Name	Student Submitted	Subject	Question
1111111	SMITH, JOHN	10/18/11 7:53:30 AM	Term schedule	What date does next term begin?
3333333	RED, FOXX	9/30/2011 4:37:22 PM	Dropping a class	When in the last date to drop a class?
6666666	PURPLE, PANSY	10/3/2011 9:15:01 AM	Financial	I need financial aid; can you help?

Date: 11/9/2011 10:58:54 AM Page 1 Location: ADVISING

36.5 Usage Data Report

Use this report to obtain a count of eAdvising questions submitted by students in each month during a selected date range, as well as year to date. The report displays counts for Unduplicated Count for students with Temp IDs and Total Usage for students with Temp IDs, and Unduplicated Count for students with Student IDs and Total Usage for students with Student IDs. The selected data is compared to the same time frame for the previous year.

Here is an example of the setup screen used to generate the USAGE DATA REPORT.



The options are:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- FROM: Use to select the first month to be included in the report.
- TO: Use to select the last month to be included in the report.
- YEAR: Use to select the target year to be displayed. The report will display counts for that year, as well as for the previous year for comparison.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

36.5.1 Set-Up the Usage Data Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on eADVISING REPORTS and then on USAGE DATA REPORT to display the setup screen.
4. Click on LOCATION CODE▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
5. Click on the FROM ▼ and select the first month to be included in the report.
6. Click on the TO ▼ and select the last month to be included in the report.
7. Click on YEAR ▼ and select the target year for the report.
8. Preview or print the report. (See "View, Print and Export Reports" in Section 40.)
9. Click on CLOSE, or if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the Usage Data Report:

eAdvising Usage Data Report

Selected Years Data (2013)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
Unduplicated Count – Temp ID's	0	0	1	0	2	5	7	3	0	1	0	0	19
Total Usage – Temp ID;s	0	0	1	0	4	7	12	6	0	1	0	0	31
Unduplicated Count – Student ID's	42	68	170	235	364	202	52	36	386	278	390	185	2408
Total Usage – Student ID's	62	88	232	397	425	276	84	43	576	380	425	290	3278
Total Usage	104	156	404	632	795	490	155	88	962	660	815	475	5736

Previous Years Data (2012)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
Unduplicated Count – Temp ID's	0	0	0	0	0	0	0	2	4	6	8	10	30
Total Usage – Temp ID;s	0	0	0	0	0	0	0	2	5	8	10	20	45
Unduplicated Count – Student ID's	0	0	0	0	0	0	0	98	275	182	250	120	925
Total Usage – Student ID's	0	0	0	0	0	0	0	125	360	204	276	179	1144
Total Usage	0	0	0	0	0	0	0	227	644	400	544	329	2144

SECTION 37 – STATISTICAL REPORTS

37.0 Overview

This Section covers the standardized statistical reports, all of which are available from SARS·REPORTS.

The list that follows is a table of contents for Section 37.

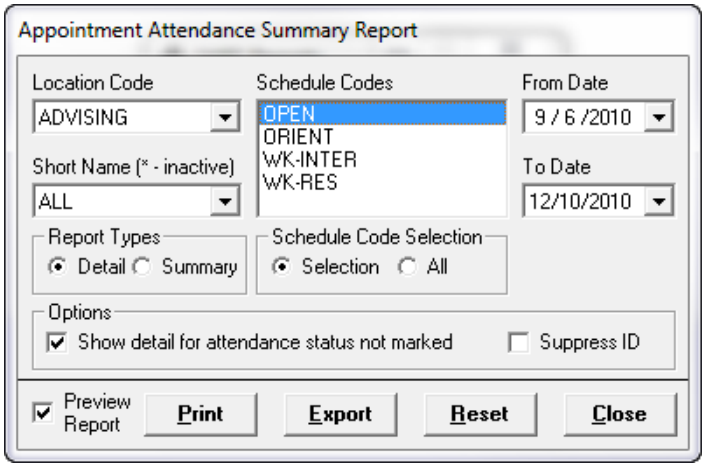
37.1 Appointment Attendance Summary Report

Use this report, in the Detail version, to obtain appointment statistics, including the number of drop-in visits, appointments by attendance status (attended, unattended, unmarked), cancelled appointments, individual appointment slots unfilled, and non-scheduled student contacts by type of contact.

Use the report, In the Summary version, to display only the number of attended appointments, drop-ins, and non-scheduled student contacts by type of contact.

In both versions, use to obtain a list of appointments for which attendance remains unmarked to assist in identifying and correcting incomplete attendance data.

Here is an example of the setup screen used to generate the APPOINTMENT ATTENDANCE SUMMARY REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- SHORT NAME (* = INACTIVE): Use to select the advisor about whom the report will be generated.
- REPORT TYPES: Use to select the desired version of the report.

  DETAIL: Use to generate the detailed version of the report.

  SUMMARY: Use to generate the summary version of the report.
- SCHEDULE CODES: Use to include a selected SCHEDULE CODE or all SCHEDULE CODES in the report.

  SCHEDULE CODE SELECTION:

  SELECTION: Use to include only the highlighted Schedule Codes in the report.

ALL:	Use to include all Schedule Codes in the report.
• FROM DATE:	Use to establish the first date of a date range on which to be reported.
• TO DATE:	Use to establish the last date of a date range on which to be reported.
• OPTIONS:	
SHOW DETAIL FOR ATTENDANCE STATUS NOT MARKED:	Use to include a list of appointments for which attendance status has not been recorded. This is useful for ensuring that all attendance has been marked.
SUPPRESS ID:	Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.
• PREVIEW REPORT:	Use to display a report on the screen prior to or in lieu of printing.
• PRINT:	Use to initiate printing of the report.
• EXPORT:	Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
• RESET:	Use to restore all of the report set-up screen selections to the initial defaults.
• CLOSE:	Use to exit the screen.

37.1.1 Set up the Appointment Attendance Summary Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on APPOINTMENT ATTENDANCE SUMMARY REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on SHORT NAME (* = INACTIVE)▼ and then click on the Short Name of the advisor for whom the report will be generated.

   -or-

   Click on ALL to include all advisors.

-or-

Click on ALL – ACTIVE to include all active advisors.

-or-

Click on ALL – INACTIVE to include all inactive advisors.

7. In the Report Types panel, click on either DETAIL or SUMMARY, depending upon the desired version of the report.

8. Under SCHEDULE CODE SELECTION, choose one of the following options:

   a. Click on SELECTION and then highlight one or more Schedule Codes from the list above to generate the report for multiple Schedule Codes.

   b. Click on ALL to generate the report for all Schedule Codes.

9. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Using the Date Picker" in Appendix B.)

10. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

11. In the Options panel,

    a. Click on the checkbox for SHOW DETAIL FOR ATTENDANCE STATUS NOT MARKED to include a list of appointments for which attendance status has not been recorded, or leave the checkbox blank to exclude the list.

    b. Click on SUPPRESS ID, if desired.

12. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40 of this Part.)

13. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the detail version of the APPOINTMENT ATTENDANCE SUMMARY REPORT with the option to SHOW DETAIL FOR ATTENDANCE STATUS NOT MARKED checked.

Appointment Attendance Summary Report - Detail

9/6/2010 - 12/17/2010
Short Name: ALL

Schedule Code: ALL

Appointment Status	Individual	Group
Appointments - Attended	2,011	373
Drop-ins	997	
Appointments - Unmarked	295	28
Appointments - Not Attended	3	0
Appointments - Cancelled	105	9
Appointment Slots Unfilled	38	

Additional Contacts	
Description	
E-mail	240
Front Counter	60
In-person	120
Telephone	395

List of appointments which did not have attendance status marked Yes or No.

Date	Time	Advisor	Student ID	Name
10/1/10	1:30 PM	POLK	11111111	SMITH, JOHN
11/4/10	8:00 AM	ADAMS	22222222	CAMPBELL, CAROL
11/18/10	4:30 PM	BUCHANAN	33333333	ALDERSON, JAMES

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Here is an example of the summary version of the APPOINTMENT ATTENDANCE SUMMARY REPORT.

Appointment Attendance Summary Report

9/6/2010 – 12/17/2010
Short Name: ALL

Schedule Code: ALL

Appointment Status	Individual	Group
Appointments - Attended	2,011	373
Drop-ins	997	

Additional Contacts	
Description	
E-mail	240
Front Counter	60
In-person	120
Telephone	395

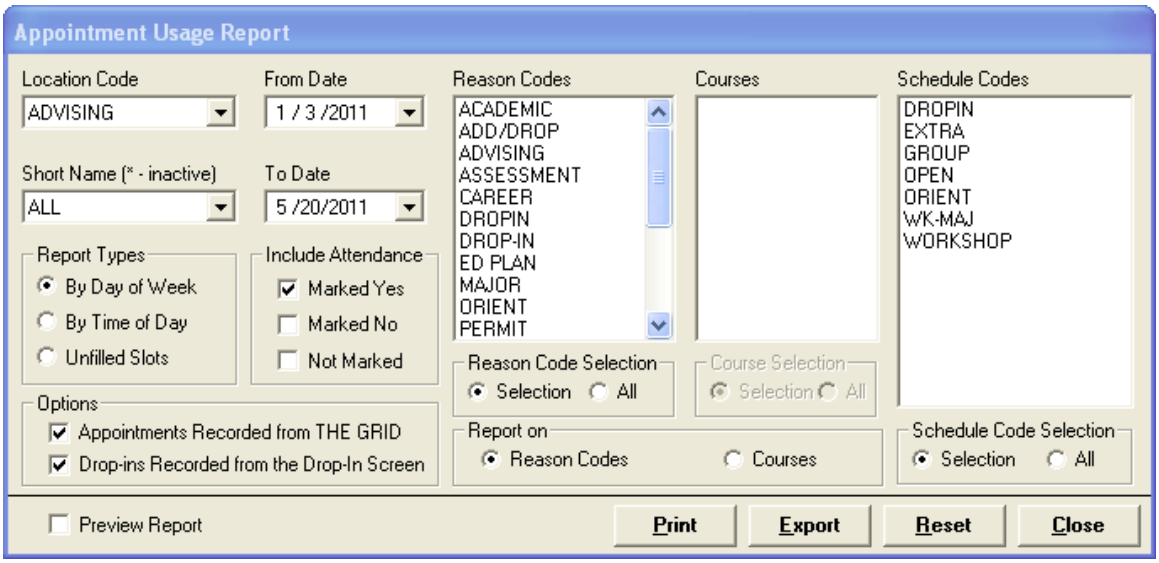
Printed 12/18/2010 10:59:28 AM Location: ADVISING

37.2 Appointment Usage Report

Use this report to manage staffing resources by obtaining the total number of appointments booked and the total number of individual appointment slots unfilled. There are three versions of the report: by day of the week, by time of day (with individual appointments and group appointments segregated), or unfilled slots.

You may refine the report by choosing only appointments with a particular attendance status, or you may expand the report by choosing all booked appointments, regardless of attendance status. You may also choose to include all appointments recorded from THE GRID or to include drop-ins recorded from the STUDENT DROP-IN SCREEN. In addition, you may further refine the report by selecting Reason Code(s) (or Courses) and Schedule Code(s).

Here is an example of the setup screen used to generate the APPOINTMENT USAGE REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- SHORT NAME (* = INACTIVE): Use to select the advisor about whom the report will be generated.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- REPORT TYPES: Use to choose the version of the Appointment Usage report that you wish to view or print.

  BY DAY OF WEEK: Use to view or print a total count of the selected appointment-allowable Schedule Codes for each time slot on each day of the week for a specified time period.

This report provides a detailed listing, followed by a summary.

BY TIME OF DAY: Use to view or print a total count of the selected appointment-allowable Schedule Codes for each time slot on each day of the week during a specified time period.

UNFILLED SLOTS: Use to view or print the number of slots containing the selected individual appointment-allowable Schedule Codes for which an appointment is not booked. This report provides a detailed listing, followed by a summary. When this option is selected, Reason Codes are not available for inclusion in the report.

- INCLUDE ATTENDANCE: Use to choose the type of appointments to be included in the report. More than one option may be chosen.

  MARKED YES: Use to include data for those appointments that students attended.

  MARKED NO: Use to include data for those appointments that students did not attend.

  NOT MARKED: Use to include data for those appointments for which the attendance status has not been marked.

- OPTIONS:

  APPOINTMENTS RECORDED FROM THE GRID: Use to include in the report all appointments and drop-ins booked into time slots on THE GRID.

  DROP-INS RECORDED FROM THE DROP-IN SCREEN: Use to include in the report all drop-ins that are registered using the DROP-IN SCREEN feature.

- REASON CODES: Use to select one or more Reason Code(s) to be included in the report.

  REASON CODE SELECTION:

    SELECTION: Use to include only the highlighted Reason Codes in the report.

    ALL: Use to include all Reason Codes in the report. This is the default.

- COURSES: Use to select one or more Course(s) to be included in the report, if courses are being used as Reasons by your Location. This option is disabled if the report to be generated is for UNFILLED SLOTS.

  COURSE SELECTION:

    SELECTION: Use to include only the highlighted Courses in the report.

ALL: Use to include all Courses in the report. This is the default.

- REPORT ON: Use to activate the Reason Codes options or the Courses options, depending on the desired specifications for the report.

  REASON CODES: Use to specify that the report will use Reason Codes.

  COURSES: Use to specify that the report will use Courses.

- SCHEDULE CODES: Use to select one or more Schedule Code(s) to be included in the report.

  SCHEDULE CODE SELECTION:

  SELECTION: Use to include only the highlighted Schedule Codes in the report.

  ALL: Use to include all Schedule Codes in the report. This is the default.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.

- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.

- CLOSE: Use to exit the screen.

37.2.1 Set up the Appointment Usage Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on APPOINTMENT USAGE REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on SHORT NAME (* = INACTIVE)▼ and then click on the Short Name of the advisor for whom the report will be generated.

-or-

Click on ALL to include all advisors.

-or-

Click on ALL – ACTIVE to include all active advisors.
-or-

Click on ALL – INACTIVE to include all inactive advisors.

7. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

8. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

9. In the Report Types panel, select the desired version of the report by clicking on either BY DAY OF WEEK, BY TIME OF DAY, or UNFILLED SLOTS.

10. In the Include Attendance panel, click on one or more attendance options to select the types of appointments to be included in the report.

11. In the Options panel, select one or both of the following:

    a. Click on APPOINTMENTS RECORDED FROM THE GRID to include all such activities scheduled in time slots through THE GRID.

    b. Click on DROP-INS RECORDED FROM THE DROP-IN SCREEN to include all drop-ins who have registered using the Drop-In Screen and who have been seen by an advisor.

12. [If Reason Codes are being used for the report] In the Report On panel, click on Reasons Codes. This will enable the Reason Codes options. Then click on SELECTION and then highlight one or more Reason Codes from the list, or click on ALL to include all Reason Codes in the report. This option is disabled if the report to be generated is for UNFILLED SLOTS.

    -or-

    [If Courses are being used as Reasons] In the Report On panel, click on Courses. This will enable the Courses options. Then click on SELECTION and then highlight one or more Courses from the list, or click on ALL to include all Courses in the report. This option is disabled if the report to be generated is for UNFILLED SLOTS.

13. In the Schedule Code Selection panel, click on SELECTION and then highlight one or more Schedule Codes from the list, or click on ALL to include all appointment-allowable Schedule Codes in the report. For the BY DAY OF WEEK and BY TIME OF DAY reports, both individual and group Schedule Codes are available for selection; for the UNFILLED SLOTS report, only individual appointment-allowable Schedule Codes may be selected.

14. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40 of this Part.)

Notes
When previewing the report in the "By time of Day" mode, the first page to be displayed will contain the Individual Appointments. Click on CLOSE to display the page containing the Group Appointments. After viewing the Group Appointments page, click on CLOSE to return to the set up screen.

When printing the report in the "By Time of Day" mode, it is necessary to execute the print command twice – once to print the page containing Individual Appointments and again to print the page containing Group Appointments. After printing the first page, the print screen will be displayed again. Click on OK to print the Group Appointments page. Click on CANCEL when the screen is displayed again.

15. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the detailed portion of the APPOINTMENT USAGE REPORT (BY DAY OF WEEK).

Appointment Usage Report

By Day of Week
2/1/2011 - 2/28/2011
Short Name: ALL

Date	Day of Week	Individual	Group
2/1/2011	Tuesday	65	0
2/2/2011	Wednesday	49	0
2/3/2011	Thursday	69	0
2/4/2011	Friday	41	0
2/7/2011	Monday	33	0
2/8/2011	Tuesday	63	0
2/9/2011	Wednesday	49	0
2/10/2011	Thursday	68	0
2/11/2011	Friday	39	0
2/14/2011	Monday	25	0
2/15/2011	Tuesday	61	75
2/16/2011	Wednesday	48	0
2/17/2011	Thursday	69	0
2/18/2011	Friday	45	0
2/21/2011	Monday	27	0
2/22/2011	Tuesday	69	0
2/23/2011	Wednesday	42	0
2/24/2011	Thursday	69	50
2/25/2011	Friday	47	0
2/28/2011	Monday	31	0

Printed 5/9/2011 10:59:28 AM Location: ADVISING

Here is an example of the summary portion of the APPOINTMENT USAGE REPORT (BY DAY OF WEEK).

Appointment Usage Report

By Day of Week
2/1/2011 - 2/28/2011
Short Name: ALL

Date	Day of Week	Individual		Group	
		Total	Average*	Total	Average*
	Monday	116	29.00	0	0
	Tuesday	321	64.20	175	35.00
	Wednesday	234	46.80	0	0
	Thursday	338	67.60	50	10.00
	Friday	172	43.75	0	0
	Saturday	0	0	0	0
	Sunday	0	0	0	0
	Total	1,181		225	

*Average is derived by dividing the total count by the number of days in which at least one appointment was scheduled.

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Here is an example of the page containing individual appointment data for the APPOINTMENT USAGE REPORT (BY TIME OF DAY). Note that appointment usage is associated with the starting time of the appointment. The report only displays those time slots for which there is appointment usage.

Appointment Usage Report

By Time of Day
5/2/2011 - 5/20/2011
Short Name: ALL

Individual Appointments

TIMES	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
8:00 AM	0	0	5	0	0	0	0	5
8:30 AM	5	3	5	3	7	0	0	23
9:00 AM	5	3	5	3	7	0	0	23
9:30 AM	23	5	15	5	10	0	0	58
10:00 AM	0	15	17	8	13	0	0	53
10:30 AM	0	17	23	10	10	0	0	60
11:00 AM	0	15	23	13	15	0	0	66
11:30 AM	0	15	10	11	15	0	0	51
12:00 PM	0	9	10	7	5	0	0	31
12:30 PM	15	2	10	5	5	0	0	37
1:00 PM	28	23	14	16	10	0	0	91
1:30 PM	35	23	24	16	5	0	0	103
2:00 PM	35	18	24	17	5	0	0	99
2:30 PM	35	13	20	9	5	0	0	82
3:00 PM	10	13	20	9	5	0	0	57
3:30 PM	20	15	20	7	0	0	0	62
4:00 PM	30	10	20	7	0	0	0	67
4:30 PM	15	5	15	4	0	0	0	39
5:00 PM	15	5	15	4	0	0	0	39
5:30 PM	10	5	10	4	0	0	0	29
6:00 PM	10	5	10	4	0	0	0	29
6:30 PM	10	5	10	4	0	0	0	29
7:00 PM	10	5	10	4	0	0	0	29
7:30 PM	10	5	10	4	0	0	0	29
Total	321	234	345	174	117	0	0	1,191

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Here is an example of the next page of the APPOINTMENT USAGE REPORT (BY TIME OF DAY) containing group appointment data. Note that appointment usage is associated with the starting time of the appointment. The report only displays those time slots for which there is appointment usage.

Appointment Usage Report

By Time of Day
5/2/2011 - 5/20/2011
Short Name: ALL

Group Appointments

TIMES	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
9:00 AM	100	0	0	0	0	0	0	100
10:00 AM	0	0	50	0	0	0	0	50
2:00 PM	75	0	0	0	0	0	0	75
Total	175	0	50	0	0	0	0	225

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Here is an example of the detailed portion of the APPOINTMENT USAGE REPORT (UNFILLED SLOTS).

Appointment Usage Report

Unfilled Slots
5/2/2011 - 5/20/2011
Short Name: ALL

Date	Day of Week	Individual Unfilled Slots
5/2/2011	Monday	4
5/3/2011	Tuesday	3
5/4/2011	Wednesday	0
5/5/2011	Thursday	0
5/6/2011	Friday	1
5/9/2011	Monday	10
5/10/2011	Tuesday	2
5/11/2011	Wednesday	0
5/12/2011	Thursday	0
5/13/2011	Friday	0
5/16/2011	Monday	7
5/17/2011	Tuesday	0
5/18/2011	Wednesday	0
5/19/2011	Thursday	0
5/20/2011	Friday	2

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Here is an example of the summary portion of the APPOINTMENT USAGE REPORT (UNFILLED SLOTS).

Appointment Usage Report

Unfilled Slots
5/2/2011 - 5/20/2011
Short Name: ALL

Date	Day of Week	Individual Unfilled Slots	
		Total	Average*
	Monday	33	8.25
	Tuesday	0	0
	Wednesday	0	0
	Thursday	4	1.00
	Friday	8	1.60
	Saturday	0	0
	Sunday	0	0
	Total	45	

*Average is derived by dividing the total count by the number of days in which at least one appointment was scheduled.

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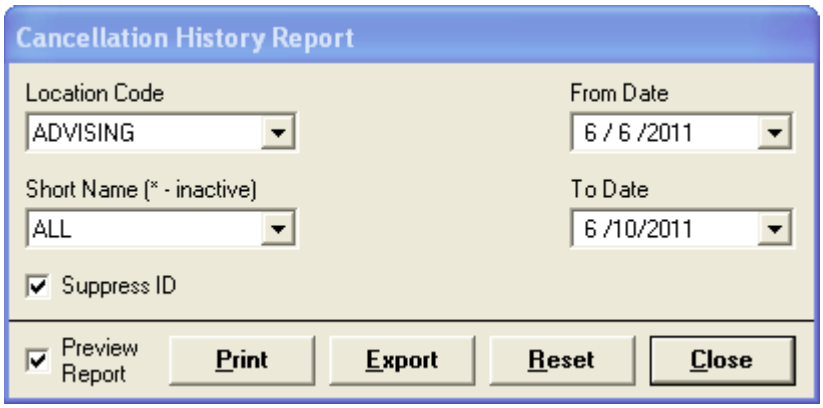
37.3 Cancellation History Report

Use this report to obtain a list of cancelled appointments for a specific date range. The report may be generated for one advisor at a time or for all advisors.

The report displays the appointment date and time, Short Name, student's ID and name, reason for the cancellation, and total number of cancelled appointments. The report sorts data by appointment date and within appointment date by advisor's abbreviated name.

Here is an example of the setup screen used to generate the CANCELLATION HISTORY REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- SHORT NAME (* = INACTIVE): Use to select the advisor about whom the report will be generated.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.3.1 Set up the Cancellation History Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on CANCELLATION HISTORY REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on SHORT NAME (* = INACTIVE)▼ and then click on the Advisor for whom the report will be generated.

   -or-

   Click on ALL to include all advisors, including deleted Short Names.

   -or-

   Click on ALL – ACTIVE to include all active advisors.

   -or-

   Click on ALL – INACTIVE to include all inactive advisors.
7. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)
8. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
9. Click on SUPPRESS ID, if desired.
10. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40 of this Part.)
11. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the CANCELLATION HISTORY REPORT.

Cancellation History Report

6/6/2011 - 6/10/2011
Short Name: ALL

Date	Time	Advisor	ID	Student's Name	Reason Code(s)
6/6/11	8:30 AM	BUCHANAN	********	SMITH, JOHN	Cancelled by student
6/6/11	2:30 PM	MADISON	********	YELLOW, YVETTE	Cancelled by student
6/7/11	5:00 PM	ADAMS	********	BROWN, BAXTER	Cancelled by student
6/8/11	4:00 PM	ADAMS	********	WHITE, LILY	Cancelled by student
6/9/11	8:00 AM	BUCHANAN	********	THOMPSON, TOM	Cancelled by student
6/9/11	9:30 AM	PIERCE	********	INDIGO, IRIS	Cancelled by staff
6/9/11	5:30 PM	ADAMS	********	BLACK, BUDDY	Cancelled by student
6/10/11	10:30 AM	MADISON	********	RED, FOXX	Cancelled by student

Total Cancellations: 8

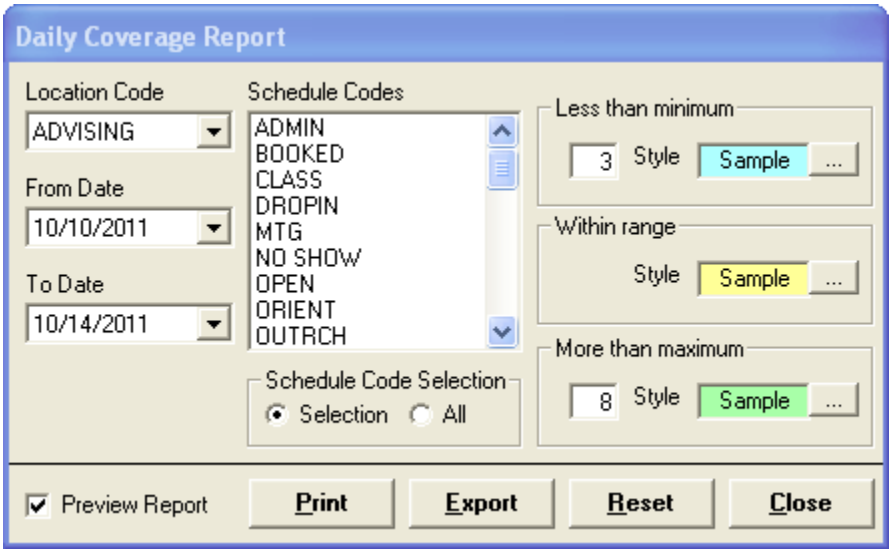
Printed 6/13/2011 10:59:28 AM Location: ADVISING

37.4 Daily Coverage Report (SARS·GRID)

Use this report to obtain a graphical display of the actual number of advisors available for coverage, by time, for a specified date range.

The report displays, in bar chart format, the number of advisors available for advising functions. Time increments correspond with the established Time Increment and are displayed as rows. The length of the horizontal bar represents the number of advisors scheduled to work during a time slot on the selected date, with the actual number of advisors displayed on the horizontal bar. The bars are color-coded to distinguish the time slots for which total coverage is less than the minimum needed, within the desired range, or more than the maximum needed. Booked, No Show and Showed, or their equivalents, are included in the list of Schedule Codes.

Here is an example of the setup screen used to generate the DAILY COVERAGE REPORT (SARS·GRID).



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- FROM DATE: Use to establish the first date of a date range to be displayed on the report.
- TO DATE: Use to establish the last date of a date range to be displayed on the report.
- SCHEDULE CODES: Use to display a list of Schedule Code(s) and/or Schedule Code Group(s) that may be selected for the report.

SCHEDULE CODE SELECTION:

SELECTION: Use to include only the highlighted Schedule Code(s) in the report.

ALL:	Use to include all Schedule Codes in the report.
• LESS THAN MINIMUM:	Use to indicate the number of advisors working on a given date that would be less than the minimum needed.
STYLE:	Use to select background and font colors showing that the number of advisors scheduled to work is less than the minimum needed.
• WITHIN RANGE (STYLE):	Use to select background and font colors showing that the number of advisors scheduled to work on a given date is within the desired range.
STYLE:	Use to select background and font colors showing that the number of advisors scheduled to work is within the range that is needed.
• MORE THAN MAXIMUM:	Use to indicate the number of advisors working on a given date that would exceed the number needed.
STYLE:	Use to select background and font colors showing that the number of advisors scheduled to work is more than the maximum needed.
• PREVIEW REPORT:	Use to display a report on the screen prior to or in lieu of printing.
• PRINT:	Use to initiate printing of the report.
• EXPORT:	Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
• RESET:	Use to restore all of the report set-up screen selections to the initial defaults.
• CLOSE:	Use to exit the screen.

37.4.1 Set up the Daily Coverage Report (SARS·GRID) for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on DAILY COVERAGE REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.

6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

8. Under SCHEDULE CODE SELECTION, choose one of the following options:

   a. Click on SELECTION and then highlight one or more selected Schedule Codes to include in the report. To include in the count all advisors present, even if they have booked appointments, select OPEN, BOOKED, SHOWED, and NO SHOW, at a minimum.

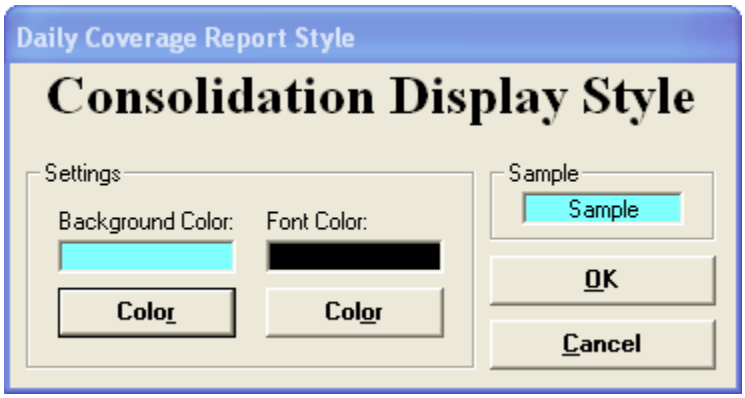
   -or-

   b. Click on ALL to generate the report for all Schedule Codes.

9. In the LESS THAN MINIMUM field, enter the number of advisors that, if present to work on a given date, would still be less than the minimum needed. (If using a date range rather than a single date, be sure that this number is applicable to all the dates in the range.)

10. In the MORE THAN MAXIMUM field, enter the number of advisors that, if present to work on a given date, will be more than the maximum needed. (If using a date range rather than a single date, be sure that this number is applicable to all the dates in the range.)

11. For each of the three staffing level designations (Less Than Minimum, Within Range, and More Than Maximum), click on the three-dotted box to the right of STYLE. Each time, the following screen will appear.



The options are:

- SETTINGS

  BACKGROUND COLOR: Use to establish the background color that will be used to indicate an advisor resource level for each day.

  FONT COLOR: Use to establish the color of the text.

- OK: Use to approve the change.

- CANCEL: Use to terminate the action without saving.

a. To select a BACKGROUND COLOR:

i. Click on COLOR to display the COLOR screen. Then click on the desired color from the palette of BASIC COLORS.

-or-

Click on DEFINE CUSTOM COLORS to create a custom color of your choice. The Sample box will show how those selections appear.

ii. Click on OK to approve the selection.

iii. Click on OK on the CONSOLIDATION DISPLAY STYLE screen to return to the DAILY COVERAGE REPORT setup screen.

Tip
Avoid selecting the color white as a background color. White will not be noticeable when the Daily Coverage Report is printed onto white paper.

b. To select a FONT COLOR:

i. Click on COLOR to display the COLOR screen. Then click on the desired color from the palette of BASIC COLORS.

-or-

Click on DEFINE CUSTOM COLORS to create a custom color of your choice. The Sample box will show how those selections appear.

ii. Click on OK to approve the selection.

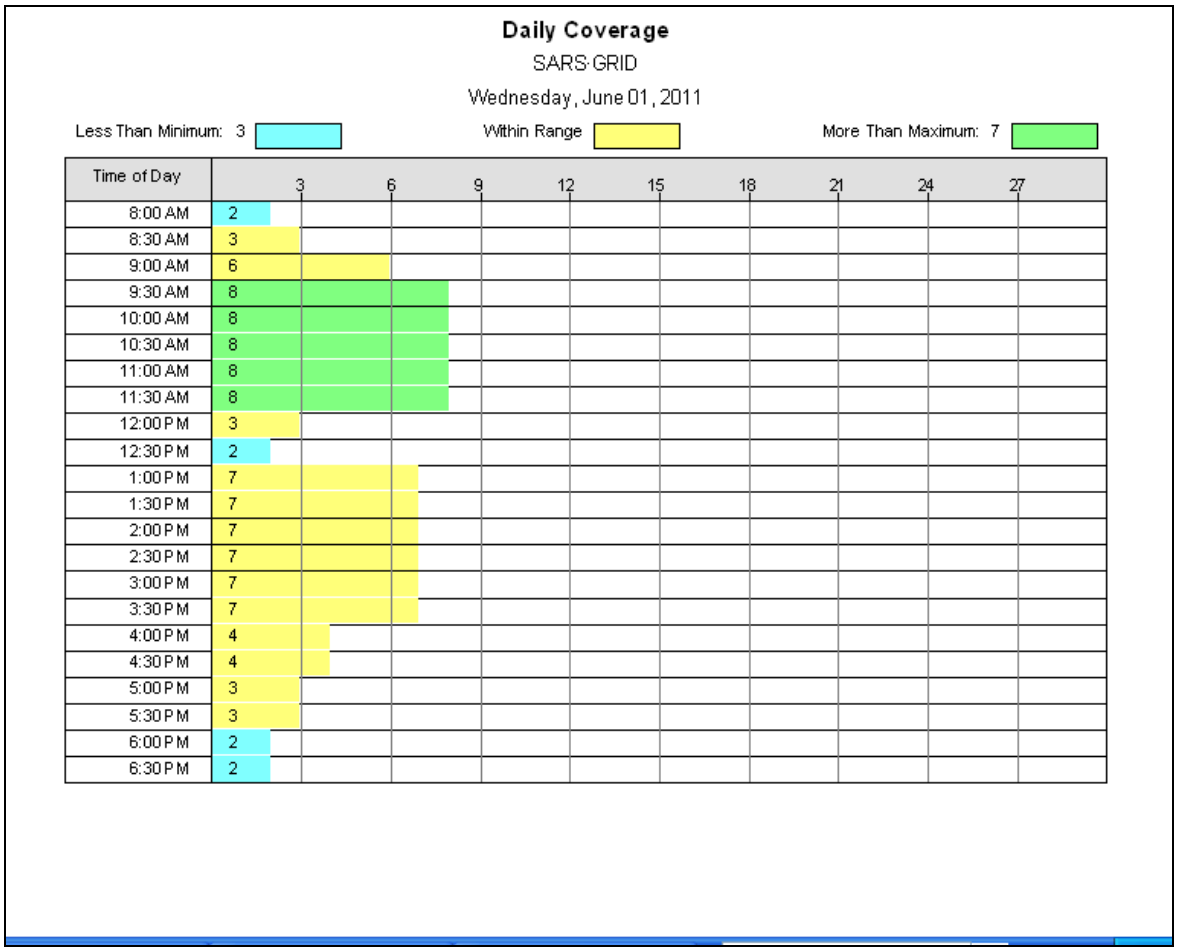
iii. Click on OK on the CONSOLIDATION DISPLAY STYLE screen to return to the DAILY COVERAGE REPORT setup screen.

12. Preview, print or export the report. ((See “View, Print and Export Reports” in Section 40 of this Part.)

Note
Each day of the report will be printed on a separate page.

13. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

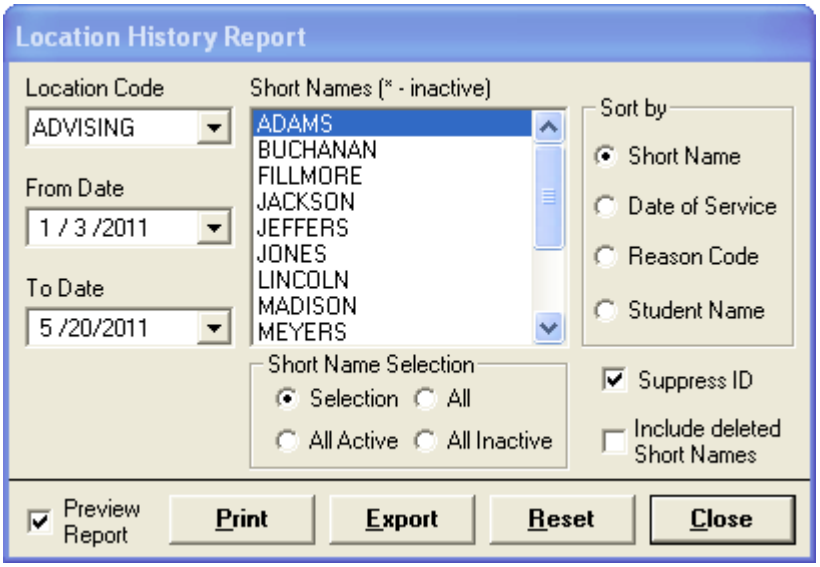
Here is an example of the DAILY COVERAGE REPORT (SARS·GRID).



37.5 Location History Report

Use this report to obtain a list of appointments scheduled from THE GRID that were marked as attended, as well as drop-ins recorded from the Drop-In Screen for students who were assigned to an advisor. The report displays, for a selected Location, the Short Name of the advisor, the date and time of the appointment or drop-in visit, the student's ID and name; and the reason(s) for the appointment. It also displays a total count for each category: Total Appointments and Total Dropins. This report is only displayed in landscape format. It may be generated in four different sort orders: by Short Name, by Date of Service, by Reason Code, or by Student's Name.

Here is an example of the setup screen used to generate the LOCATION HISTORY REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations. Only one location may be selected for each report.

- FROM DATE: Use to establish the first date of a date range on which to be reported.

- TO DATE: Use to establish the last date of a date range on which to be reported.

- SHORT NAMES (* - INACTIVE): Use to select the Short Name of the advisor about whom the report will be generated.

  SHORT NAME SELECTION:

  SELECTION: Use to highlight only the Short Names to be included in the report.

  ALL: Use to include all active and inactive advisors in the report. This option may also be used if most of the Short

Names will be selected; it will highlight all Short Names, and then the names to be excluded may be deselected by clicking on them.

ALL ACTIVE: Use to include only All Active Short Names in the report, excluding any inactive Short Names.

ALL INACTIVE: Use to include only the inactive Short Names in the report, excluding any active Short Names.

- SORT BY: Use to specify the manner in which the report should be sorted.

  SHORT NAME: Use to sort the report alphabetically by advisor Name.

  DATE OF SERVICE: Use to sort the report chronologically by date of service.

  REASON CODE: Use to sort the report alphabetically by Reason Code.

  STUDENT NAME: Use to sort the report alphabetically by Student Name.

- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.

- INCLUDE DELETED SHORT NAMES: [Optional] Use when selecting “All” Short Names to include Short Names that have been deleted from the system.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.

- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.

- CLOSE: Use to exit the screen.

37.5.1 Set up the Location History Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on LOCATION HISTORY REPORT to display the setup screen.

5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.

6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

8. Select the SHORT NAMES to be included in the report using one of the following options:

   a. Click on SELECTION in the Short Name Selection panel and then highlight each Short Name to be included in the report.

      -or-

   b. Click on ALL to include all names on the list. (Note: this option may also be used when most names are to be selected. After all names are highlighted, click on each name to be deselected.) The report will also include data for deleted Short Names, even though they are not displayed on the list, if the INCLUDE DELETED SHORT NAMES option is also selected.

      -or-

   c. Click on the ALL ACTIVE to include all names that are active.

      -or-

   d. Click on ALL INACTIVE to include all inactive names.

Note
If "All" advisors are included in the report, each advisor's schedule will be displayed on a separate sheet of paper.

9. In the Sort by panel, click on one of the following options to establish the manner in which the report will be sorted: Short Name, Date of Service, Reason Code, or Student Name.

10. Click on SUPPRESS ID, if desired.

11. [Optional] Click on INCLUDE DELETED SHORT NAMES if the "All" option under Short Names has been selected.

12. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40 of this Part.)

13. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the LOCATION HISTORY REPORT, sorted by Student Name.

Location History Report
Sorted by Student Name
1/6/2011 - 1/6/2011

Short Name	Date	Time	Student ID	Student Name	Reason(s)
LINCOLN	1/6/2011	01:00 PM	9999999	BLACK, JOSIE	GENERAL ADV
MADISON	1/6/2011	09:00 AM	2222222	BLUE, BETTY	GENERAL ADV, SEP
BUCHANAN	1/6/2011	04:00 PM	0000011	BROAD, JOHN	SEP
REAGAN	1/6/2011	02:00 PM	0000002	BROWN, BERNARD	TRANSFER
BUSH	1/6/2011	03:00 PM	0000005	COWAN, PETER	CAREER, TRANSFER
BUCHANAN	1/6/2011	03:00 PM	0000006	ENRIQUEZ, TOM	SEP
BUCHANAN	1/6/2011	04:00 PM	0000012	GILL, ELEANOR	SEP
BUCHANAN	1/6/2011	03:30 PM	0000007	GOREN, GILBERT	SEP
LINCOLN	1/6/2011	12:30 PM	7777777	GREENE, SUSAN	PERSONAL, PROBATION
CLINTON	1/6/2011	02:30 PM	0000003	GREY, GARSON	GENERAL ADV, SEP
WASHINGTON	1/6/2011	03:30 PM	0000008	JONES, SADIE	CAREER, RE
REAGAN	1/6/2011	04:30 PM	0000013	LEONG, LILY	TRANSFER
CLINTON	1/6/2011	02:30 PM	0000004	MAUVE, DOTTIE	CAREER
BUCHANAN	1/6/2011	12:00 PM	5555555	ORANGE, OTTO	SEP
WASHINGTON	1/6/2011	01:00 PM	8888888	PINK, PINKIE	TRANSFER
JEFFERSON	1/6/2011	04:00 PM	0000009	PRUITT, ELLIE	RE, SEP
MONROE	1/6/2011	05:30 PM	0000017	PRUITT, PAMELA	CAREER, TRANSFER
BUCHANAN	1/6/2011	12:00 PM	6666666	PURPLE, PANSY	SEP
ADAMS	1/6/2011	09:30 AM	3333333	RED, FOXX	CAREER, RE
ADAMS	1/6/2011	08:30 AM	1111111	SMITH, JOHN	TRANSFER
ADAMS	1/6/2011	04:00 PM	0000010	SMITH, RONALD	TRANSFER
MONROE	1/6/2011	04:30 PM	0000014	THAYER, JAMES	GENERAL ADV
ADAMS	1/6/2011	04:30 PM	0000015	VASQUEZ, RENE	AA AUDIT, CAREER
REAGAN	1/6/2011	05:00 PM	0000016	WANG, JERRY	PERSONAL
BUSH	1/6/2011	01:30 PM	0000001	WHITE, WINNIE	AA AUDIT
TYLER	1/6/2011	09:30 AM	4444444	YELLOW, YVETTE	CAREER, AA AUDIT

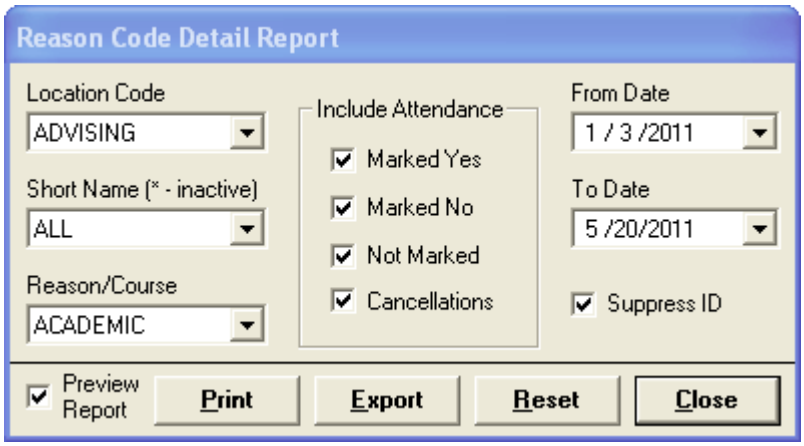
Total Appointments: 26
Total Drop-ins: 0

Date: 1/7/2011 10:59:28 AM Location: ADVISING

37.6 Reason Code Detail Report

Use this report to review the appointments associated with each Reason Code during a specified time period. This report displays, for the selected Reason Code, the student's name, ID, and telephone number. It also shows the appointment date and advisor's abbreviated name. This report is useful for following up with those students who share a common reason. For example, all students who met with an advisor to discuss transferring to a state college may be identified and contacted to inform them about a visit to the campus by the state college's representative.

Here is an example of the setup screen used to generate the REASON CODE DETAIL REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations. Only one location may be selected for each report.
- SHORT NAME (* = INACTIVE): Use to select the advisor about whom the report will be generated.
- REASON/COURSE: Use to select the REASON CODE or COURSE on which to be reported.
- INCLUDE ATTENDANCE: Use to select the types of attendance status to include in the report.

  MARKED YES: Use to include all appointments for which the attendance was marked as attended.

  MARKED NO: Use to include all appointments for which the attendance was marked as not attended.

  NOT MARKED: Use to include all appointments for which attendance was not recorded.

  CANCELLATIONS: Use to include all appointments that were marked as cancelled.

- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student ID's on a printed report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.6.1 Set up the Reason Code Detail Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on REASON CODE DETAIL REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on SHORT NAME (* = INACTIVE)▼ and then click on the Advisor for whom the report will be generated.

   -or-

   Click on ALL to include all advisors, including deleted Short Names.

   -or-

   Click on ALL – ACTIVE to include all active advisors.

   -or-

   Click on ALL – INACTIVE to include all inactive advisors.

7. Click REASON/COURSE ▼ and select the desired code to be reviewed.

8. In the Include Attendance panel, click on one or more attendance options to select the types of appointments to be included in the report.

9. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

10. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

11. Click on SUPPRESS ID, if desired.

12. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40 of this Part.)

13. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the REASON CODE DETAIL REPORT showing all appointments with all advisors pertaining to transfers.

Reason Code Detail Report

4/4/2011 - 4/29/2011
Short Name: ALL
Reason Code: TRANSFER

Attendance: ☑ Attended ☑ Not Attended ☑ Not Marked ☐ Cancelled

Student ID	Student Name	Phone #	Appt. Date	Short Name
********	BLUE, BETTY	(415) 454-6464	4/11/11	MADISON
********	SMITH, JOHN	(415) 456-7890	4/4/11	MADISON
********	GREENE, SUSAN	(415) 222-3334	4/8/11	BUCHANAN
********	ORANGE, OTTO	(510) 489-7784	4/8/11	LINCOLN
********	PINK, PINKIE	(510) 929-3949	4/8/11	LINCOLN
********	PURPLE, PANSY	(415) 214-6053	4/11/11	POLK
********	RED, FOXX	(415) 567-8901	4/7/11	BUCHANAN
********	YELLOW, YVETTE	(415) 948-2654	4/6/11	POLK
********	BLACK, JOSIE	(510) 556-7676	4/8/11	PIERCE
********	BROWN, BERNARD	(510) 275-3165	4/7/11	MADISON
********	WHITE, WINNIE	(415) 532-7851	4/22/11	PIERCE
********	ALBERT, ALLEN	(415) 111-1112	4/28/11	POLK
********	DOE, JANE	(415) 456-7944	4/13/11	ROOSEVT
********	DOE, JOHN	(415) 123-4123	4/27/11	BUCHANAN
********	GREY, GARSON	(510) 925-6752	4/25/11	ADAMS
********	MAUVE, DOTTIE	(415) 646-6776	4/15/11	ADAMS
********	COWAN, PETER	(415) 727-3747	4/28/11	POLK
********	ENRIQUEZ, TOM	(415) 565-7585	4/4/11	LINCOLN
********	GOREN, GILBERT	(650) 852-1826	4/18/11	POLK

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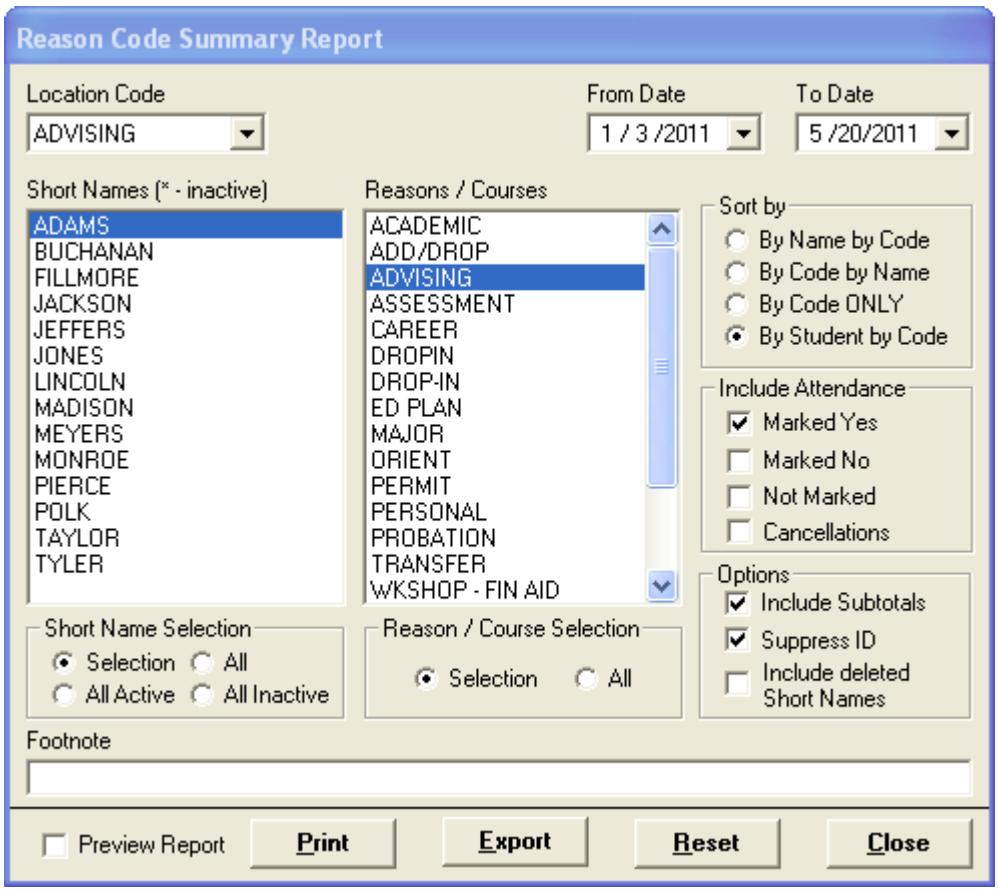
37.7 Reason Code Summary Report

Use this report to review the total number of student appointments and drop-ins by Reason Code. There are four versions of the report: by advisor, listing a total for each Reason Code; by Reason Code, listing a total for each advisor; by Reason Code only, or by student by code, listing a total for each Reason Code. An option also exists to display subtotals within each category.

You may include or exclude appointments that students have attended, not attended, and cancelled; appointments for which the attendance status has not been entered.

This report displays, for the designated date range, the advisor's abbreviated name, REASON CODE, and the number of student contacts. Because more than one reason may be associated with an appointment, the total number of reasons may exceed the number of student contacts.

Here is an example of the setup screen used to generate the REASON CODE SUMMARY REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations. Only one Location may be selected for each report.

- FROM DATE: Use to establish the first date of a date range on which to be reported.

- TO DATE: Use to establish the last date of a date range on which to be reported.

- SHORT NAMES (* - INACTIVE): Use to select one or more advisor(s) about whom the report will be generated.

  SHORT NAME SELECTION:

  SELECTION: Use to include only the highlighted Short Name(s) in the report.

  ALL: Use to include all active and inactive advisors in the report. This option may also be used if most of the Short Names will be selected; it will highlight all Short Names, and then the names to be excluded may be deselected by clicking on them.

  ALL ACTIVE: Use to include only All Active Short Names in the report, excluding any inactive Short Names.

  ALL INACTIVE: Use to include only the inactive Short Names in the report, excluding any active Short Names.

- REASONS/COURSES: Use to select the REASON CODE(S) for the report.

  REASON/COURSE SELECTION:

  SELECTION: Use to include only the highlighted Reason Codes in the report. In the selection mode, users may click on each desired code to highlight it.

  ALL: Use to include all Reason Codes/Courses in the report. Or use to highlight all reason codes/courses, and then deselect the codes/courses to be excluded.

- SORT BY: Use to control how the information is grouped on the REASON CODE SUMMARY REPORT.

  BY NAME BY CODE: Use to aggregate data by advisor name and then within advisor name by REASON CODE.

  BY CODE BY NAME: Use to aggregate data by REASON CODE and then within REASON CODE by advisor name.

  BY CODE ONLY: Use to aggregate data by one, multiple, or all REASON CODES.

  BY STUDENT BY CODE: Use to aggregate data by student and then within each student name by REASON CODE.

- INCLUDE ATTENDANCE: Use to include data by type of appointment attendance status.

  MARKED YES: Use to include data for those appointments that students attended.

MARKED NO:	Use to include data for those appointments that students did not attend.
NOT MARKED:	Use to include data for those appointments for which the attendance status has not been marked.
CANCELLATIONS:	Used to include data for cancelled appointments.

- OPTIONS:

INCLUDE SUBTOTALS:	Use to refine the list to include subtotals for each Reason Code category.
SUPPRESS ID:	Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.
INCLUDE DELETED SHORT NAMES:	[Optional] Use when selecting "All" Short Names to include Short Names that have been deleted from the system.

- FOOTNOTE: Use to record a reminder about the options that were selected when generating the report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.7.1 Set up the Reason Code Summary Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on REASON CODE SUMMARY REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.

6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.

8. Select the SHORT NAMES to be included in the report using one of the following options:

   a. Click on SELECTION in the Short Name Selection panel and then highlight each name to be included in the report.

      -or-

   b. Click on ALL to select all names on the list. (Note: this option may also be used when most names are to be selected. After all names are highlighted, click on each name to be deselected.) The report will also include data for delete Short Names, even though they are not displayed on the list, if the INCLUDE DELETED SHORT NAMES option is also selected.

      -or-

   c. Click on the ALL ACTIVE to include all names that are active.

      -or-

   d. Click on ALL INACTIVE to include all inactive names.

9. Select the Reason Codes and/or Courses to be included in the report using one of the following options:

   a. Click on SELECTION in the Reasons / Courses Selection panel and then highlight each reason or course to be included in the report.

      -or-

   b. Click on ALL to select all reasons/courses on the list. (Note: this option may also be used when most reasons/courses are to be selected. After all reasons/courses are highlighted, click on each reason/course to be deselected.)

10. In the Sort by panel, select one of the following options:

    a. Click on BY NAME BY CODE to first group the data by advisor; then for each advisor, aggregate the data by Reason Code.

       -or-

    b. Click on BY CODE BY NAME to first group the data by Reason Code; then for each Reason Code, aggregate the data by advisor.

       -or-

    c. Click on BY CODE ONLY to group the data only by each Reason Code.

       -or-

d. Click on BY STUDENT BY CODE to first group the data by student; then for each student, aggregate the data by Reason Code.

11. In the Include Attendance panel, click on one or more attendance options to select the types of appointments to be included in the report.

12. In the Options panel,

    a. Click on INCLUDE SUBTOTALS to include subtotals for each advisor or for each REASON CODE.

    b. Click on SUPPRESS ID, if desired.

    c. [Optional] Click on INCLUDE DELETED SHORT NAMES if the "All" option under Short Names has been selected.

13. To include a footnote, type in the space provided.

14. Preview, print or export report. (See "View, Print and Export Reports" in Section 40 of this Part.)

15. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the REASON CODE SUMMARY REPORT, sorted by Name by Code.

Reason Code Summary Report

By Name - By Reason Code
1/3/2011 - 5/20/2011

Attendance: ☑ Attended ☑ Not Attended ☑ Not Marked ☐ Cancelled

Name	Reason Code	Number of Student Contacts
ADAMS		
	AA	147
	CAREER	76
	SEP	543
	TRANS-CSU	128
	TRANS-US	30
		Total: 924
BUCHANAN		
	CAREER	42
	RE	16
	SEP	459
	TRANS-CSU	291
	TRANS-UC	129
		Total: 937
LINCOLN		
	AA	103
	CAREER	14
	RE	2
	SEP	542
	TRANS-CSU	146
	TRANS-UC	117
		Total: 924
MADISON		
	AA	142
	CAREER	115
	SEP	403
	TRANS-CSU	179
	TRANS-UC	82
		Total: 921
PIERCE		
	AA	122
	CAREER	74
	RE	27
	SEP	343
	TRANS-CSU	191
	TRANS-UC	146
		Total: 903

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Here is an example of the REASON CODE SUMMARY REPORT, sorted By Code by Name and with a footnote.

Reason Code Summary Report

By Reason Code - By Name
1/3/2011 - 5/20/2011

Attendance: ☑ Attended ☑ Not Attended ☑ Not Marked ☐ Cancelled

Reason Code	Name	Number of Student Contacts
AA		
	ADAMS	147
	BUCHANAN	103
	LINCOLN	142
	MADISON	122
	PIERCE	199
	POLK	207
		Total: 920
CAREER		
	ADAMS	76
	BUCHANAN	42
	LINCOLN	14
	MADISON	115
	PIERCE	74
	POLK	50
	ROOSEVT	194
		Total: 565
RE		
	BUCHANAN	16
	LINCOLN	2
	MADISON	27
	PIERCE	19
	POLK	1
		Total: 65
SEP		
	ADAMS	543
	BUCHANAN	459
	LINCOLN	542
	MADISON	403
	PIERCE	343
	POLK	294
	ROOSEVT	444
		Total: 3,028

All reason codes for the date range specified.

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Here is an example of the REASON CODE SUMMARY REPORT, sorted By Code ONLY.

Reason Code Summary Report

By Reason Code Only
1/3/2011 - 5/20/2011

Attendance: ☑ Attended ☑ Not Attended ☑ Not Marked ☐ Cancelled

Reason Code	Description	Number of Student Contacts
AA	Degree Evaluation	920
CAREER	Career Information	565
RE	Re-entry	65
SEP	Student Educational Plan	3,028
TRANS-CSU	CSU Transfer Advising	1,280
TRANS-UC	UC Transfer Advising	685

Total: 6,563

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Here is an example of the REASON CODE SUMMARY REPORT, sorted By Student by Code.

Reason Code Summary Report

By Student Name - By Reason Code
1/3/2011 - 5/20/2011

Attendance: ☑ Attended ☑ Not Attended ☑ Not Marked ☐ Cancelled

Student ID	Student Name	Reason / Course	Number of Student Contacts
********	BLUE, BARBARA		
		AA	2
		CAREER	1
		GRAD	1
			Total: 4
********	BROWN, BOB		
		PLACEMENT	1
		RE	1
		SEP	1
			Total: 3
********	GREEN, GARY		
		AA	1
		TRANS-CSU	2
		TRANS-UC	1
			Total: 4
********	ORANGE, OROVILLE		
		PERSONAL	4
		PROBATION	3
			Total: 7
********	RED, ROBERT		
		ADVISING	1
		SEP	1
			Total: 2
********	VIOLET, VIVIAN		
		ADVISING	2
		PERSONAL	1
		PLACEMENT	1
		SEP	2
			Total: 6
********	WHITE, WILLIAM		
		CAREER	2
		GRAD	1
		TRANS-UC	2
			Total: 5
********	YELLOW, YANELY		
		PLACEMENT	1
		RE	2
		SEP	1
			Total: 4
			Grand Total: **35**

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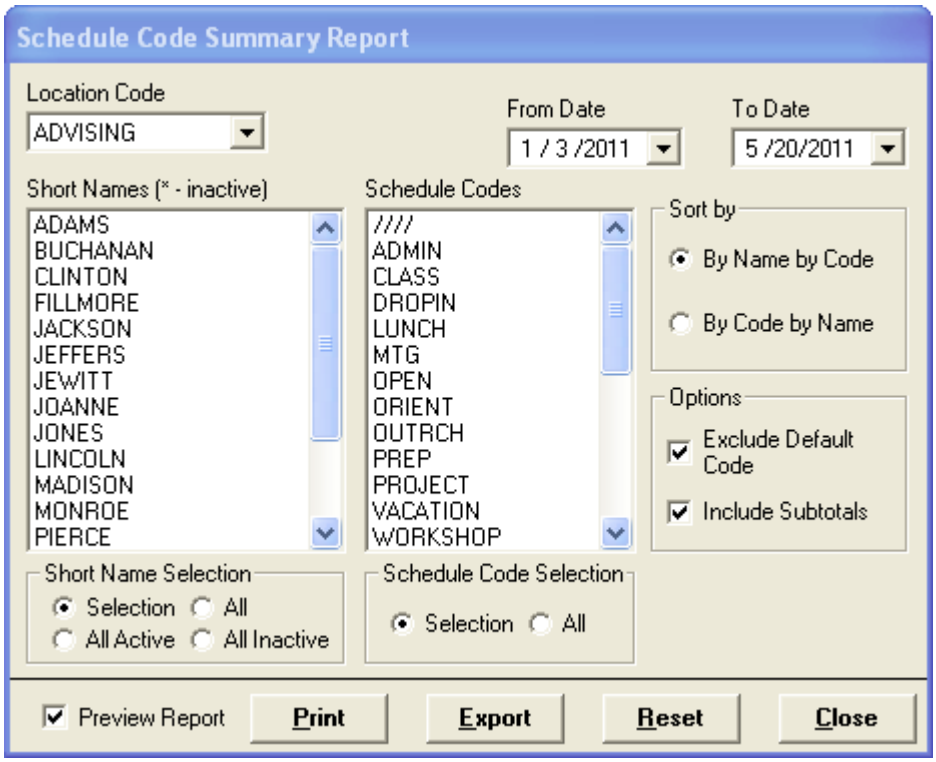
37.8 Schedule Code Summary Report

Use this report to review the number of hours and contacts allocated to the various Schedule Codes during a selected time period. There are two versions of the report: by Short Name or by Schedule Code. You may also obtain subtotals within each category.

This report displays, for the designated date range, the advisor's name, SCHEDULE CODE, and the number of hours. It also displays the aggregate number of contacts for appointments with attendance status marked "yes". (An extended appointment counts as one contact. A group appointment counts the total number of attendees.) Drop-in contacts are not reflected in this report. (To obtain a report showing the number of drop-in visits, see "Appointment Attendance Summary Report" in this Part, Section 37.1).

If the open appointment Schedule Code is selected, the report will display a tally that includes all open appointment slots and all booked appointments. This occurs because a booked appointment cell's original value was as an open appointment. (To obtain a report showing an advisor's proposed hours by activity, see "Master Schedule Report" in this Part, Section 35.9.)

Here is an example of the setup screen used to generate the SCHEDULE CODE SUMMARY REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations. Only one Location may be selected for each report.

- FROM DATE: Use to establish the first date of a date range to be displayed on the report.

- TO DATE: Use to establish the last date of a date range to be displayed on the report.
- SHORT NAMES (* = INACTIVE): Use to select one or more advisor(s) about whom the report will be generated.

  SHORT NAME SELECTION:

  SELECTION: Use to include only the highlighted Short Name(s) in the report.

  ALL: Use to include all active and inactive advisors in the report. This option may also be used if most of the Short Names will be selected; it will highlight all Short Names, and then the names to be excluded may be deselected by clicking on them.

  ALL ACTIVE: Use to include only All Active Short Names in the report, excluding any inactive Short Names.

  ALL INACTIVE: Use to include only the inactive Short Names in the report, excluding any active Short Names.
- SCHEDULE CODES: Use to include selected SCHEDULE CODES in the report.

  SCHEDULE CODE SELECTION:

  SELECTION: Use to include only the highlighted Schedule Codes in the report. In the selection mode, users may click on each desired code to highlight it.

  ALL: Use to include all Schedule Codes in the report. Also use to highlight all schedule codes, and then deselect the codes to be excluded.
- SORT BY: Use to control how the information is grouped on the SCHEDULE CODE SUMMARY REPORT.

  BY NAME BY CODE: Use to aggregate data by short name and then within short name by SCHEDULE CODE.

  BY CODE BY NAME: Use to aggregate data by SCHEDULE CODE and then within SCHEDULE CODE by advisor name.
- OPTIONS:

  EXCLUDE DEFAULT CODE: Use to disregard the default code when generating the report.

  INCLUDE SUBTOTALS: Use to include subtotals by category.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.

- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.8.1 Set up the Schedule Code Summary Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on SCHEDULE CODE SUMMARY REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)
7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
8. Select the SHORT NAMES to be included in the report using one of the following options:

   a. Click on SELECTION in the Short Name Selection panel and then highlight each name to be included in the report.

   -or-

   b. Click on ALL to select all names on the list. (Note: this option may also be used when most names are to be selected. After all names are highlighted, click on each name to be deselected.)

   -or-

   c. Click on the ALL ACTIVE to include all names that are active.

   -or-

   d. Click on ALL INACTIVE to include all inactive names.

9. Select the Schedule Code(s) to be included in the report using one of the following options:

   a. Click on SELECTION in the Schedule Code Selection panel and then highlight each Schedule Code to be included in the report.

-or-

b. Click on ALL to select all Schedule Codes on the list. (Note: this option may also be used when most Schedule Codes are to be selected. After all schedule codes are highlighted, click on each Schedule Code to be deselected.)

10. In the Sort by panel, select the desired version of the report:

    a. Click on BY NAME BY CODE to first group the data by advisor; then for each advisor, aggregate the data by Schedule Code.

    -or-

    b. Click on BY CODE BY NAME to first group the data by Schedule Code; then for each Schedule Code, aggregate the data by advisor.

11. In the OPTIONS panel, select the desired options:

    a. To exclude the Default Schedule Code, click on EXCLUDE DEFAULT CODE.

    b. To include subtotals for each advisor or for each Schedule Code, click on the INCLUDE SUBTOTALS checkbox.

12. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40 of this Part.)

13. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the SCHEDULE CODE SUMMARY REPORT, by Short Name.

Schedule Code Summary Report

1/3/2011 - 1/31/2011
Sorted by Name by Code

Name	Schedule Code	Hours	Contacts
John Adams			
	OPEN	38.0	76
	DROPIN	23.0	0
	Total:	61.0	76
James Buchanan			
	OPEN	48.0	92
	DROPIN	23.0	0
	Total:	71.0	92
Millard Fillmore			
	OPEN	44.0	86
	DROPIN	23.0	0
	Total:	67.0	86
Andrew Jackson			
	OPEN	44.0	88
	DROPIN	23.0	0
	Total:	67.0	88
Thomas Jefferson			
	OPEN	47.0	92
	DROPIN	24.0	0
	Total:	71.0	92
Abraham Lincoln			
	OPEN	38.0	76
	DROPIN	22.0	0
	Total:	60.0	76
James Madison			
	OPEN	42.0	80
	DROPIN	23.0	0
	Total:	65.0	80

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Here is an example of the SCHEDULE CODE SUMMARY REPORT, by Schedule Code.

Schedule Code Summary Report

1/3/2011 - 1/31/2011
Sorted by Code by Name

Schedule Code	Name	Hours	Contacts
OPEN			
	John Adams	38.0	76
	James Buchanan	48.0	92
	Millard Fillmore	44.0	86
	Andrew Jackson	44.0	88
	Thomas Jefferson	47.0	92
	Abraham Lincoln	38.0	76
	James Madison	42.0	80
	Total:	301.0	590.0
DROPIN			
	John Adams	23.0	0
	James Buchanan	23.0	0
	Millard Fillmore	23.0	0
	Andrew Jackson	23.0	0
	Thomas Jefferson	24.0	0
	Abraham Lincoln	22.0	0
	James Madison	23.0	0
	Total:	161.0	0

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37.9 Short Name History Report

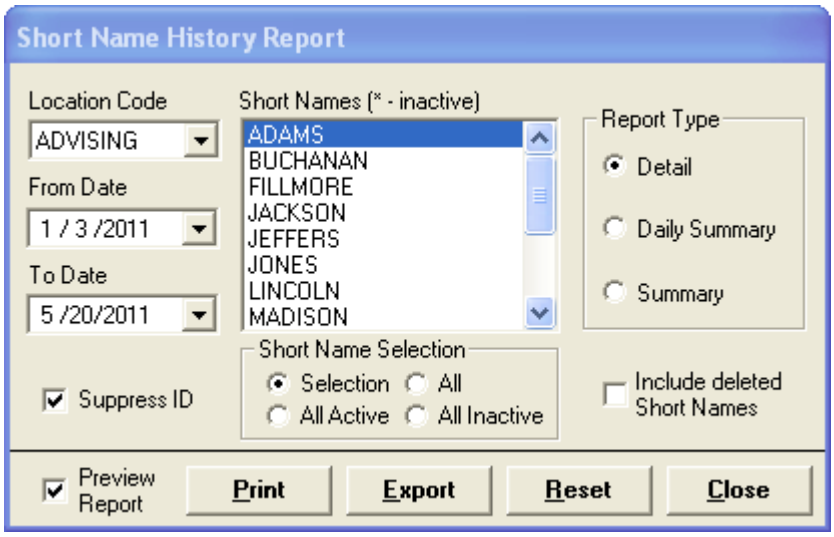
Use this report to obtain a list of advisor appointment activity. There are three versions of the report: Detail, Daily Summary, and Summary.

The detail version displays, for each selected advisor, a list of students with appointments during a specified time period. The display fields include the source of the information (SARS·GRID, Drop-in Screen, or SARS·TRAK); student's ID and name; the date, time, duration, reason(s) and any comments for the appointment; and the attendance status of the visit. It also displays the total number of appointments and aggregate number of minutes by attendance status, a tally of drop-ins, as well as the total number of additional (non-appointment) student contacts, by type of contact, during the date range. This report is displayed in landscape format.

The daily summary version displays, for each selected advisor the number of Appointment Slots Unfilled, the number of appointments for which attendance is Not Marked, the number of Shows, the number of No Shows, the number of Cancellations, the number of drop-ins, and the number of additional student contacts for each day during the date range. This report is displayed in landscape format.

The summary version displays, for a selected date range, the total number of appointments by attendance status, a tally of drop-ins, and a tally of additional student contacts for the selected advisor(s).

Here is an example of the setup screen used to generate the SHORT NAME HISTORY REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations. Only one location may be selected for each report.

- FROM DATE: Use to establish the first date of a date range on which to be reported.

- TO DATE: Use to establish the last date of a date range on which to be reported.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student ID's on a printed report.
- SHORT NAMES (* = INACTIVE): Use to select one or more advisor(s) about whom the report will be generated.

  SHORT NAME SELECTION:

  SELECTION: Use to include only the highlighted Short Names in the report.

  ALL: Use to include all active and inactive advisors in the report. This option may also be used if most of the Short Names will be selected; it will highlight all Short Names, and then the names to be excluded may be deselected by clicking on them.

  ALL ACTIVE: Use to include All Active Short Names in the report, excluding any inactive Short Names.

  ALL INACTIVE: Use to include only the inactive Short Names in the report, excluding any active Short Names.
- REPORT TYPE: Use to choose one of the following options:

  DETAIL: Use to display, for each advisor selected, a page listing student appointments and a tally of additional student contacts.

  DAILY SUMMARY: Use to display, for each advisor selected, the total number of appointments by attendance status as well as a tally of drop-ins and additional student contacts for each day in the selected date range.

  SUMMARY: Use to display, for each advisor selected, the total number of appointments by attendance status.
- INCLUDE DELETED SHORT NAMES: [Optional] Use when selecting "All" Short Names to include Short Names that have been deleted from the system.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.9.1 Set up the Short Name History Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on SHORT NAME HISTORY REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
8. Click on SUPPRESS ID, if desired.
9. Select the SHORT NAMES to be included in the report using one of the following options:

   a. Click on SELECTION in the Short Name Selection panel and then highlight each name to be included in the report.

      -or-

   b. Click on ALL to select all names on the list. (Note: this option may also be used when most names are to be selected. After all names are highlighted, click on each name to be deselected.) The report will also include data for delete Short Names, even though they are not displayed on the list, if the INCLUDE DELETED SHORT NAMES option is also selected.

      -or-

   c. Click on the ALL ACTIVE to include all names that are active.

      -or-

   d. Click on ALL INACTIVE to include all inactive names.

10. In the Report Type panel, select the desired version of the report by clicking on DETAIL, DAILY SUMMARY, or SUMMARY.
11. [Optional] Click on INCLUDE DELETED SHORT NAMES if the "All" option under Short Names has been selected.

12. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40 of this Part.)

13. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the summary version of the SHORT NAME HISTORY REPORT with ALL advisors selected.

Short Name History Report

Summary

1/6/2011 - 1/31/2011
Short Name: ALL

Short Name	Attended	Not Attended	Attendance Not Marked	Drop-ins	Additional Contacts
ADAMS	73	3	0	29	47
BUCHANAN	89	0	0	11	9
LINCOLN	86	1	1	0	25
MADISON	78	8	0	31	24
PIERCE	88	2	0	69	15
POLK	70	6	0	28	5
ROOSEVT	82	1	1	74	18
TOTAL	566	21	2	242	143

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Here is an example of the daily summary version of the SHORT NAME HISTORY REPORT with one advisor selected.

Short Name History Report

Daily Summary

12/6/2010 - 12/31/2010
Short Name: ADAMS

Date	Attended	Not Attended	Attendance Not Marked	Appointment Slots Unfilled	Cancellations	Drop-ins	Additional Contacts
12/1/2010	4	2	0	0	1	0	2
12/2/2010	3	0	1	4	0	12	0
12/3/2010	6	0	0	0	0	3	4
12/4/2010	2	0	0	5	1	9	0
12/7/2010	0	0	0	8	0	11	0
12/8/2010	5	0	0	0	0	5	2
12/9/2010	3	0	1	4	0	7	0
12/10/2010	4	0	4	1	0	3	4
12/11/2010	4	1	0	1	0	8	0
12/14/2010	3	0	1	4	0	8	0
12/15/2010	5	0	0	0	1	6	1
12/16/2010	3	0	1	3	0	6	2
12/17/2010	3	1	0	2	0	5	3
12/18/2010	2	0	1	4	0	9	0
12/21/2010	6	0	0	0	0	4	2
12/22/2010	0	0	1	8	0	11	0
12/23/2010	6	0	0	0	1	4	6
12/24/2010	2	1	0	5	0	12	0
12/25/2010	2	0	1	3	0	7	1
TOTAL	63	5	11	52	4	130	27

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Here is an example of the detail version of the SHORT NAME HISTORY REPORT for one advisor.

Short Name History Report

Detail

12/6/2011 - 12/17/11
Short Name: ADAMS

Source	Student ID	Student's Name	Date	Time	Duration	Reason Code(s) / Comments	Attendance Status
SARS·GRID	********	ALBERT, ALLEN	12/6/2010	9:30 AM	60	ED PLAN	Attended
Drop-in	********	BLACK, JOSIE	12/6/2010	1:00 PM		GRAD, TRANSFER	Attended
SARS·TRAK	********	BLUE, BETTY	12/6/2010	1:30 PM	60	ED PLAN	Attended
SARS·GRID	********	BROAD, JOHN	12/6/2010	2:00 PM	60	ED PLAN, RE	Not Attended
SARS·GRID	********	BROWN, BERNARD	12/8/2010	9:30 AM	30	CAREER, GRAD	Attended
SARS·GRID	********	COWAN, PETER	12/8/2010	10:00 AM	30	CAREER – eSARS – Scheduled via internet	Attended
SARS·GRID	********	DOE, JANE	12/8/2010	10:30 AM	30	TRANS EVAL	Attended
SARS·GRID	********	DOE, JOHN	12/8/2010	11:30 AM	30	CAREER, GRAD	Attended
Drop-in	********	ENRIQUEZ, TOM	12/8/2010	2:30 PM		ED PLAN	Attended
SARS·GRID	********	GILL, ELEANOR	12/9/2010	1:00 PM	30	TRANSFER	Attended
SARS·GRID	********	GOREN, GILBERT	12/9/2010	1:30 PM	30	CAREER	Attended
Drop-in	********	GREENE, SUSAN	12/9/2010	2:00 PM		RE	Attended
SARS·TRAK	********	GREY, GARSON	12/9/2010	2:30 PM	60	ED PLAN	Attended
SARS·GRID	********	JONES, SADIE	12/9/2010	3:00 PM	30	TRANSFER	Attended
SARS·GRID	********	LEONG, LILY	12/9/2010	3:30 PM	30	Math 201 – SARS TRAK	Attended
SARS·GRID	********	MAUVE, DOTTIE	12/14/2010	9:30 AM	30	CANCEL STUD – eSARS – Scheduled via internet	Not Attended
SARS·GRID	********	ORANGE, OTTO	12/14/2010	10:00 AM	30	CAREER	Attended
Drop-in	********	PINK, PINKIE	12/14/2010	10:30 AM		CAREER	Attended
Drop-in	********	PRUITT, ELLIE	12/14/2010	2:00 PM		TRANS EVAL	Attended

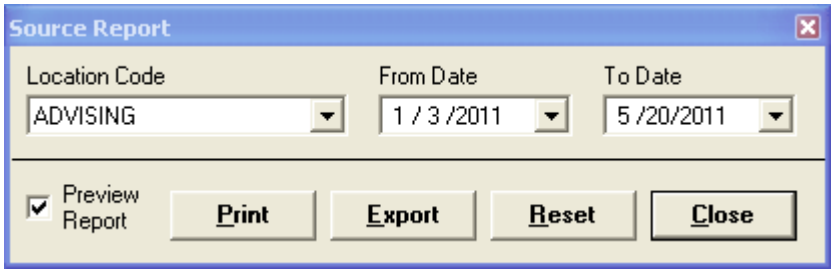
	Attendance Status									Drop-ins
	Attended			Not Attended			Not Marked			
	#	Hours	Minutes	#	Hours	Minutes	#	Hours	Minutes	
Total	73	43	30	3	2	0	0	0	0	5

Additional Contacts	
Description	Count
E-mail	30
In-person	2
Other	0
Telephone	15

37.10 Source Report

Use this report to review a count of appointments and drop-in visits for a selected Location and date range. A count is provided for booked appointments and drop-in visits broken down by the source of the booking (GRID, WEB, or SARS·TRAK) and a total for all sources. For booked appointments, the count is further broken down by attendance status (Showed, No Show, Not Marked, and Cancelled).

Here is an example of the setup screen used to generate the SOURCE REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the Location for which the report will be generated. The list will include all locations to which the user has access, including deleted locations.
- FROM DATE: Use to establish the first date of a date range to be included in the report.
- TO DATE: Use to establish the last date of a date range to be included in the report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.10.1 Set up the Source Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on SOURCE REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)
7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
8. Preview, print or export the report. ((See “View, Print and Export Reports” in Section 40 of this Part.)
9. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of SOURCE REPORT.

Source Report

From: 9/5/2011 To 12/23/2011

	GRID	WEB	TRAK	TOTAL
Booked	517	831	0	1,348
Drop-In	659		1,978	2,637
Totals	1,176	831	1,978	3,985

Breakdown of Booked Appointments				
Showed	476	790	0	1,266
No Show	15	24	0	39
Not Marked	0	0	0	0
Cancelled	26	17	0	43

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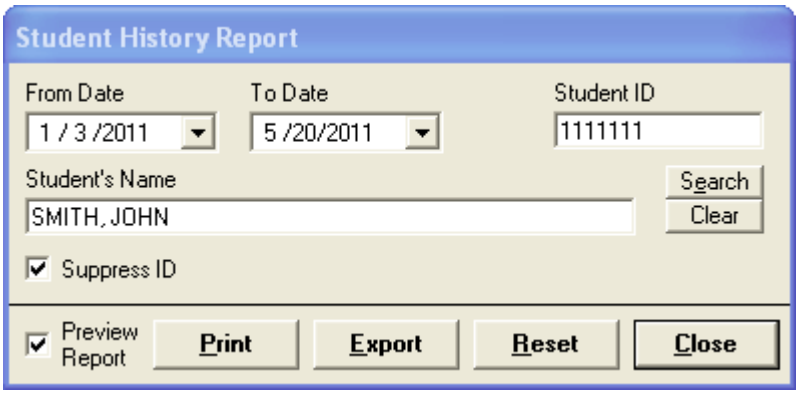
37.11 Student History Report

Use this report to review a history of a student's appointment activity during a specified time period in all locations to which the user has been granted access (MISCELLANEOUS – View Student History). The report displays the student's name, ID, date range, appointment date, location, advisor, appointment reason and any comments, appointment status, and type of activity. Totals are provided by appointment attendance status (Marked Yes, Marked No, Not Marked, or Cancelled). The report will include data for deleted Short Names.

Here is an example of the setup screen used to generate the STUDENT HISTORY REPORT.



The following options appear on this screen:

- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- STUDENT ID: Use to display or enter a student's identifier.
- STUDENT'S NAME: Use to display or enter a student's name.
  - SEARCH: Use to find a student whose ID is not known.
  - CLEAR: Use to clear the screen for another entry in Student ID or Student Name.
- SUPPRESS ID: Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.11.1 Set up the Student History Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on STUDENT HISTORY REPORT to display the setup screen.
5. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
6. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
7. Type the student's identifier in ID.

   -or-

   If the student's ID format is different from that provided in the ID field, click on the field and then press **F9**. The field will change to accept a secondary format, or (if more than two ID formats exist in the system), an ID FORMAT SELECTION screen will be displayed from which the format may be selected for use. .

   a. Click on the name from the list.

   b. Click on OK.
8. If the student's identifier is not known, type the student's name or a portion thereof in NAME and click on SEARCH. If only one match is found, the student's name and ID will be displayed. If more than one match is found, a list of all students with that name will appear.

   a. Click on the selected name.

   b. Click on OK.
9. Click on SUPPRESS ID, if desired.
10. Preview, print or export the report. ((See "View, Print and Export Reports" in Section 40 of this Part.)
11. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the STUDENT HISTORY REPORT.

Student History Report

Smith, John (111-11-1111)
1/3/2011 - 5/20/2011

Date	Location	Short Name	Reason Code(s) & Comments	Status	Activity
1/18/2011	CAREER	POLK	CAREER – Computer Programmer	Marked Yes	Appointment
2/30/2011	ADVISING	POLK	AA, GRADCK – Graduating Fall 2005	Marked Yes	Appointment
3/14/2011	ADVISING	POLK	AA, GRADCK – Graduating Fall 2005	Marked Yes	Appointment
3/28/2011	COUNSEL	POLK	PERSONAL		Move
3/29/2011	COUNSEL	POLK	PERSONAL	Cancelled	Appointment
4/25/2011	COUNSEL	POLK	PERSONAL	Marked Yes	Appointment
5/4/2011	ADVISING	POLK	ED PLAN	Marked Yes	Appointment
5/5/2011	ADVISING	POLK	ED PLAN, FIN AID	Marked Yes	Appointment
5/9/2011	COUNSEL	POLK	PERSONAL	Marked Yes	Appointment
5/11/2011	COUNSEL	POLK	PERSONAL	Cancelled	Appointment
5/16/2011	COUNSEL	POLK	PERSONAL	Marked No	Appointment
5/17/2011	COUNSEL	POLK	PERSONAL	Marked No	Appointment
5/19/2011	COUNSEL	POLK	PERSONAL	Marked Yes	Appointment

	Attendance Status Summary			
	Marked Yes	Marked No	Not Marked	Cancelled
Total	8	2	0	2

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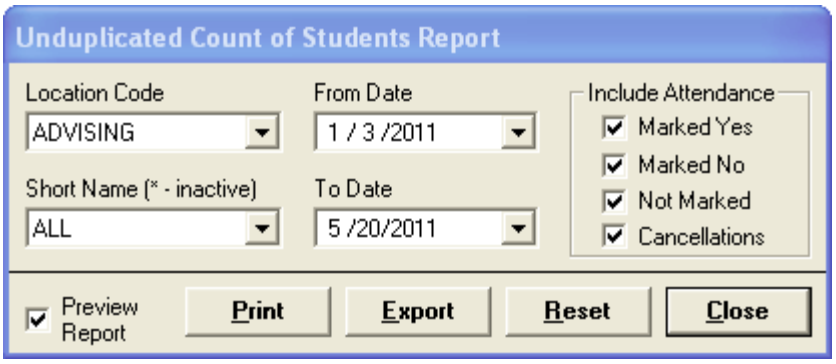
37.12 Unduplicated Count of Students Report

Use this report to obtain, for a selected date range, the total number of (unduplicated) drop-in visits, the total number of (unduplicated) booked appointments for selected attendance status (marked "yes," marked "no," not marked, and/or cancellations), and a combined total for both criteria. Although a student may attend both a drop-in session and a scheduled appointment, that student is counted only once. Therefore, the total for all contacts may not equal the sum of drop-ins and appointments. The report will include data for deleted Short Names.

Here is an example of the setup screen used to generate the UNDUPLICATED COUNT OF STUDENTS REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- SHORT NAME (* = INACTIVE): Use to select the advisor about whom the report will be generated.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- INCLUDE ATTENDANCE:
  - MARKED YES: Use to include appointments that were attended in the report.
  - MARKED NO: Use to include appointments that were not attended in the report.
  - NOT MARKED: Use to include appointments for which attendance was not recorded in the report.
  - CANCELLATIONS: Use to include cancelled appointments in the report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.

- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.12.1 Set up the Unduplicated Count of Students Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on UNDUPLICATED COUNT OF STUDENTS REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on SHORT NAME (* = INACTIVE)▼ and then click on the Short Name of the advisor for whom the report will be generated.

   -or-

   Click on ALL to include all advisors, including deleted Short Names.

   -or-

   Click on ALL – ACTIVE to include all active advisors.

   -or-

   Click on ALL – INACTIVE to include all inactive advisors.
7. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)
8. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
9. In the Include Attendance panel, click on one or more attendance options to select the types of appointments to be included in the report.
10. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40 of this Part.)
11. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the summary version of the UNDUPLICATED COUNT OF STUDENTS REPORT with ALL Short Names selected.

Unduplicated Count of Students Report

1/3/2011 - 5/20/2011
Short Name: ALL

☑ Marked Yes ☑ Not Marked
☑ Marked No ☐ Cancellations

Unduplicated Count	
Drop-Ins Only	693
Appointments Only	1,211
Total Unduplicated Contacts	1,788

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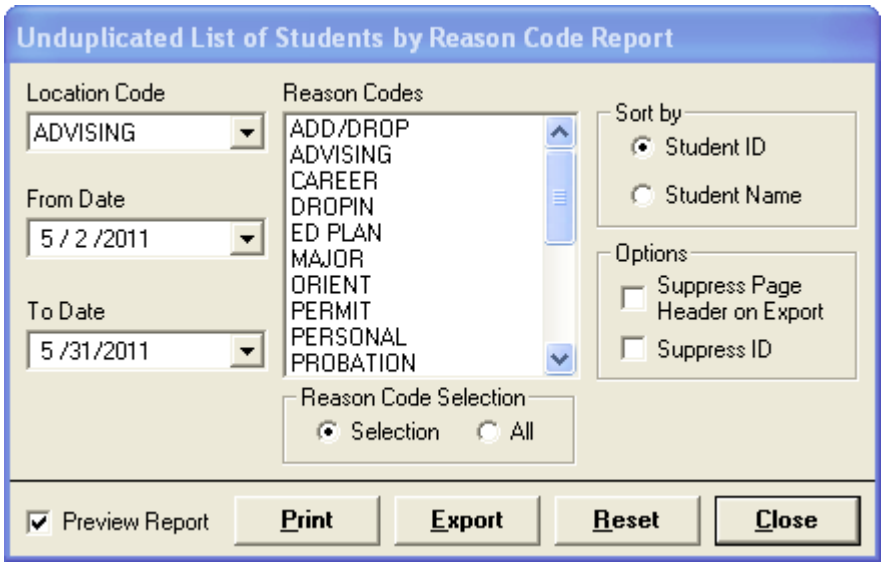
37.13 Unduplicated List of Students by Reason Code Report

Use this report to obtain, for a selected date range, a list of unduplicated/unique students sorted by student name or student ID and the total number of unduplicated contacts. One or more Reason Codes may be selected. However, the report does not group by Reason Code. Although a student may attend both a drop-in session and a scheduled appointment, that student is listed only once. The report will include data for deleted Short Names.

Here is an example of the setup screen used to generate the UNDUPLICATED LIST OF STUDENTS BY REASON CODE REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- REASON CODES: Use to select the REASON CODE(S) for the report.

  REASON CODE SELECTION:

  SELECTION: Use to include only the highlighted Reason Codes in the report.

  ALL: Use to include all Reason Codes in the report.
- SORT BY: Use to control how the information is grouped on the UNDUPLICATED LIST OF STUDENTS BY REASON CODE REPORT.

STUDENT ID:	Use to sort the information listed on the report by students' identifiers.
STUDENT NAME:	Use to sort the information listed on the report by students' last names.

- OPTIONS:

SUPPRESS PAGE HEADER ON EXPORT:	Use to exclude the header from the information that is extracted for the export.
SUPPRESS ID:	Use to replace actual ID with asterisks to insure confidentiality of student identifiers on a printed report.

- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.13.1 Set up the Unduplicated List of Students by Reason Code Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on UNDUPLICATED LIST OF STUDENTS BY REASON CODE REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
8. Select the REASON CODE(S) to be included in the report:
   a. Click on SELECTION in the Reason Code Selection panel and then highlight the desired codes.

-or-

b. Click on ALL to select all REASON CODES to include in the report.

9. In the Sort By panel, click on one of the following options to establish the manner in which the report will be sorted: STUDENT ID or STUDENT NAME.

10. In the Options panel,

    a. [Optional and if exporting the report] Click on SUPPRESS PAGE HEADER ON EXPORT.

    b. Click on SUPPRESS ID, if desired.

11. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40 of this Part.)

12. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the UNDUPLICATED COUNT OF STUDENTS BY REASON CODE REPORT.

Unduplicated List of Students by Reason Code Report

Sorted by Student ID
5/2/2011 - 5/31/2011

Student ID	Student Name	Reason Code
0000001	TAN, TERRENCE	ADVISING
0000002	PURPLE, PETER	DROPIN
0000003	RED, ROBERT	DROPIN
0000004	YELLOW, YVONNE	ASSESSMENT
0000005	BLUE, BETTY	DROPIN
0000006	SILVER, SALLY	ADVISING
0789012	NEWS, NELLIE	DROPIN
1111111	SMITH, JOHN	ADVISING
1234567	CAMPBELL, CAROL	ADVISING
1313131	NGUYEN, IRENE	PROBATION
1414141	PACHECO, PABLO	ED PLAN
1515151	PARK, PETER	TRANSFER
1616161	PETERS, PAUL	ADVISING
1818181	PHAM, PHONG	PERSONAL
1919191	PILLO, PRISCILLA	ADVISING
2222222	ALDERSON, JAMES	DROPIN
2222233	THOMAS, TED	DROPIN
2345678	NEVELL, SHUTE	DROPIN
3210987	FONESCA, FRANK	DROPIN
3333333	ANENE, ANN	DROPIN
3456789	CHEN, QUAN	DROPIN
4444444	BANKS, TINA	DROPIN
4566126	KNEW, NELLIE	DROPIN
4567890	CIMINSKI, DIANE	ACADEMIC
5555555	BANUELOS, BOB	PERSONAL
5678901	CLAY, CLAUDE	ADVISING
6666666	BATES, SANDRA	TRANSFER
6789012	COEHLO, ROBERTO	DROPIN
7654321	ELJAJ, JAMIL	DROPIN
7777777	MARTINEZ, VIRGINIA	DROPIN
7890001	INDIGO, IRIS	TRANSFER
7891001	APEX, ANTHONY	ADVISING
7992222	BELL, ELLEN	ADVISING
8181818	TURQUOISE, TRISH	PROBATION
8888888	THUMB, PATRICIA	ED PLAN
8900001	GREEN, GABE	TRANSFER
8910002	AQUA, APRIL	DROPIN
9123456	GOLD, GARY	DROPIN
9999999	COSO, CATHY	ADVISING

Total Students for the Report: 39

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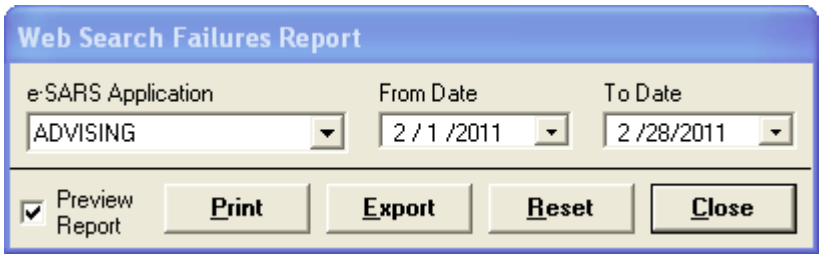
37.14 Web Search Failures Report

Use this report to obtain, for a selected date range, a list of all students who have tried to find an appointment via e·SARS but no appointments were found matching their search criteria. The purpose of the report is to aid administrators in determining whether sufficient resources are being made available. The report displays, for each search effort, the date and time of the search, the student's ID and name, the days of the week that were selected, the time range (Start Time and Stop Time) that was selected, the Short Name of the advisor who was selected, and the Reasons/Courses.

Here is an example of the setup screen used to generate the WEB SEARCH FAILURES REPORT.



The following options appear on this screen:

- e·SARS APPLICATION: Use to select the application for which the report is to be generated (e.g., Advising).
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

37.14.1 Set up the Web Search Failures Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on STATISTICAL REPORTS to display a list of available reports.
4. Click on WEB SEARCH FAILURES REPORT to display the setup screen.
5. Click on e·SARS APPLICATION ▼ and select the desired application.
6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
8. Preview, print or export the report. (See "View, Print and Export Reports" in Section 40 of this Part.)
9. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the WEB SEARCH FAILURES REPORT.

Web Search Failures Report

2/1/2011 – 2/28/2011

Search Time	ID	Student Name	Day(s)	Start Time	Stop Time	Short Name(s)	Reasons/Courses
2/5/2011 11:30 AM	1111111	SMITH, JOHN	Monday, Wednesday, Friday	3:00 PM	3:30 PM	ADAMS	MATH
2/5/2011 11:35 AM	1111111	SMITH, JOHN	Tuesday, Thursday	2:00 PM	2:30 PM	ADAMS	MATH
2/5/2011 11:38 AM	1111111	SMITH, JOHN	Monday, Wednesday, Friday	3:00 PM	3:30 PM	BUCHANAN	ADVISING
2/5/2011 11:30 AM	1111111	SMITH, JOHN	Tuesday, Thursday	2:00 PM	2:30 PM	BUCHANAN	ADVISING
2/6/2011 9:30 AM	1111111	SMITH, JOHN	Monday, Wednesday, Friday	3:00 PM	3:30 PM	ADAMS	MATH
2/6/2011 10:00 AM	1111111	SMITH, JOHN	Tuesday, Thursday	2:00 PM	2:30 PM	HILL	ENGLISH

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SECTION 38 – SYSTEM ADMINISTRATION REPORTS

38.0 Overview

This Section covers the system administration reports, all of which are available from SARS·REPORTS, SYSTEM ADMINISTRATION REPORTS. These reports are:

38.1 Change Log Report
38.2 Miscellaneous Comments Report

38.1 Change Log Report

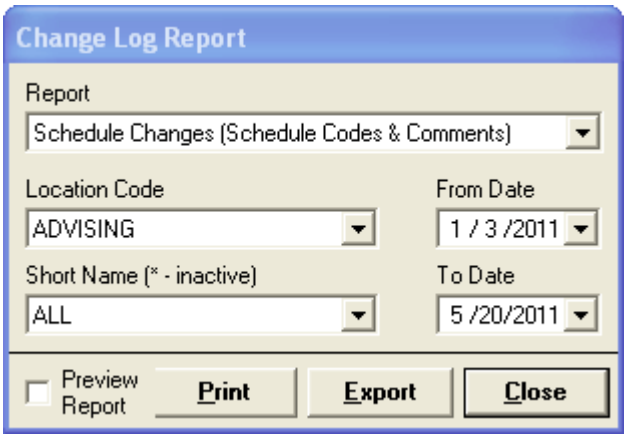
Use this report to obtain one of the following:

- A list of changes made to an advisor's schedule via the QUICK DAY CHANGE, CHANGE COLUMN and CHANGE SCHEDULE CODE screens for a selected date.
- Information on when an advisor's Master Schedule was added to THE GRID.

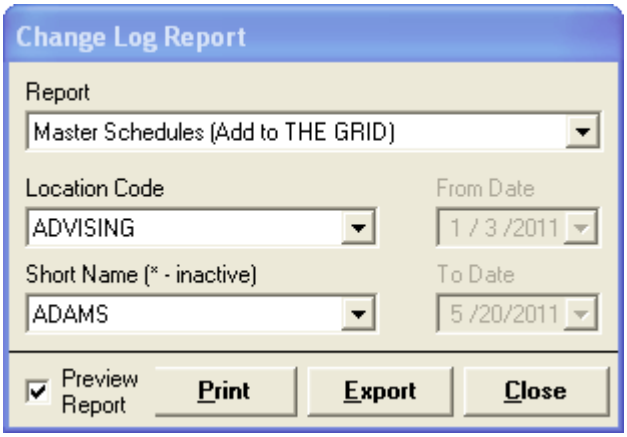
The SCHEDULE CHANGES (SCHEDULE CODES & COMMENTS) report displays, for a selected advisor and date, the time, type of change, the original value, the new value, the user name of the person who made the change, and the date and time at which the change was made.

The MASTER SCHEDULES (ADD TO THE GRID) report displays data for all templates for an advisor, including the initial Master Schedule that was added to THE GRID, from any and all locations in which the advisor has ever had a schedule. The report displays template information, the user name of the person who added the template, and the date and time at which the action was taken, in reverse chronological order.

Here are two examples of the setup screen used to generate the CHANGE LOG REPORT. The following example is selected for the SCHEDULE CHANGES (SCHEDULE CODES & COMMENTS) report.



This example is selected for the MASTER SCHEDULES (ADD TO THE GRID) report.



The following options appear on this screen:

- REPORT: Use to select the type of report to be generated.
- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations. Only one location may be selected for each report, except that if the MASTER SCHEDULES (ADD TO THE GRID) report is selected, the report will display all locations to which the selected advisor is assigned or has ever been assigned.
- SHORT NAME (* = INACTIVE): Use to select the advisor about whom the report will be generated.
- FROM DATE: [Applicable only if SCHEDULE CHANGES (SCHEDULE CODES & COMMENTS) report is selected] Use to establish the first date to be included in the report.
- TO DATE: [Applicable only if SCHEDULE CHANGES (SCHEDULE CODES & COMMENTS) report is selected] Use to establish the last date to be included in the report.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files (*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).
- CLOSE: Use to exit the screen.

38.1.1 Set up the Change Log Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on SYSTEM ADMINISTRATION REPORTS to display a list of available reports.
4. Click on CHANGE LOG REPORT to display the setup screen.
5. Click on REPORT ▼ and select the type of report to be generated.
6. Click on LOCATION CODE ▼ to display a list of locations. The list will include all locations to which the user has access, including deleted locations. Then click on the selected code.
7. Click on SHORT NAME (* = INACTIVE)▼ and then click on the Short Name of the advisor for whom the report will be generated, or click on ALL to include all advisors, or click on ALL – ACTIVE to include only all active advisors, or click on ALL – INACTIVE to include only all inactive advisors.
8. [Applicable only when the SCHEDULE CHANGES (SCHEDULE CODES & COMMENTS) report is selected] Click on FROM DATE and then type in (or select using the Date Picker) the first date to be covered by the report. (See “Date Picker” in Appendix B.)
9. [Applicable only when the SCHEDULE CHANGES (SCHEDULE CODES & COMMENTS) report is selected] Click on TO DATE and then type in (or select using the Date Picker) the last date to be covered by the report. (See “Date Picker” in Appendix B.)
10. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40.)
11. Click on CLOSE.

Here is an example of the CHANGE LOG REPORT with SCHEDULE CHANGES (SCHEDULE CODES & COMMENTS) selected.

Change Log Report

5/2/2011 - TO - 5/20/2011

Date: 05/03/2011		Name: ADAMS		Location: ADVISING	
Time	Type	Original Value	New Value	Changed By	Changed At
9:00 AM	Code	////	OPEN	SSPI	5/3/2011 05:47 PM
9:30 AM	Code	////	OPEN	SSPI	5/3/2011 05:47 PM
10:00 AM	Code	////	OPEN	SSPI	5/3/2011 05:47 PM
10:30 AM	Code	////	OPEN	SSPI	5/3/2011 05:47 PM
11:00 AM	Code	////	OPEN	SSPI	5/3/2011 05:47 PM
11:30 AM	Code	////	DROPIN	SSPI	5/3/2011 05:47 PM
12:00 PM	Code	////	DROPIN	SSPI	5/3/2011 05:47 PM
12:30 PM	Code	MTG	LUNCH	SSPI	5/3/2011 05:47 PM
12:30 PM	Comments	Name and location		SSPI	5/3/2011 05:47 PM
1:00 PM	Code	MTG	LUNCH	SSPI	5/3/2011 05:47 PM
1:00 PM	Comments	Name and location		SSPI	5/3/2011 05:47 PM
1:30 PM	Comments	Name and location	Weekly Staff Meeting	SSPI	5/3/2011 05:47 PM
2:00 PM	Code	////	MTG	SSPI	5/3/2011 05:47 PM
2:00 PM	Comments		Weekly Staff Meeting	SSPI	5/3/2011 05:47 PM
2:30 PM	Code	DROPIN	ORIENT	SSPI	5/3/2011 07:46 AM
2:30 PM	Code	DROPIN	PREP	SSPI	5/3/2011 05:47 PM
3:00 PM	Code	DROPIN	////	SSPI	5/3/2011 07:46 AM
3:00 PM	Code	DROPIN	ORIENT	SSPI	5/3/2011 05:47 PM
3:30 PM	Code	DROPIN	////	SSPI	5/3/2011 07:46 AM
3:30 PM	Code	DROPIN	////	SSPI	5/3/2011 05:47 PM
4:00 PM	Code	DROPIN	////	SSPI	5/3/2011 07:46 AM
4:00 PM	Code	DROPIN	////	SSPI	5/3/2011 05:47 PM
4:30 PM	Code	DROPIN	////	SSPI	5/3/2011 05:47 PM

Here is an example of the CHANGE LOG REPORT with MASTER SCHEDULES (ADD TO THE GRID) selected.

Change Log Report

Templates Added For: ADAMS

Template Information	Added By	Added At
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 9/1/2010 - End Date: 8/31/2011	SSPI	5/15/2011 03:51 PM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 2/21/2011 - End Date: 5/31/2011	SSPI	2/10/2011 10:42 AM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 1/3/2011 - End Date: 5/31/2011	SSPI	1/14/2011 09:04 AM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 1/3/2011 - End Date: 5/31/2011	SSPI	1/14/2011 08:57 AM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 9/1/2010 - End Date: 12/31/2010	SSPI	9/7/2010 10:03 AM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 6/1/2010 - End Date: 8/31/2011	SSPI	6/7/2010 05:07 PM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 1/4/2010 - End Date: 5/31/2010	SSPI	12/11/2009 10:09 AM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 5/1/2009 - End Date: 12/19/2009	SSPI	5/1/2009 09:04 AM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 5/1/2009 - End Date: 12/19/2009	SSPI	5/1/2009 08:54 AM
Added template 1 to THE GRID . Location Code: ADVISING - Start Date: 1/1/2009 - End Date: 5/31/2009	SSPI	1/6/2009 08:41 PM
Added template 2 to THE GRID . Location Code: CAREER - Start Date: 6/2/2008 - End Date: 12/21/2008	SSPI	5/21/2008 03:12 PM
Added template 1 to THE GRID . Location Code: COUNSEL - Start Date: 6/1/2008 - End Date: 12/21/2008	SSPI	5/21/2008 03:12 PM
Added template 1 to THE GRID . Location Code: COUNSEL - Start Date: 1/3/2008 - End Date: 5/31/2008	SSPI	1/11/2008 07:21 AM
Added template 1 to THE GRID . Location Code: COUNSEL - Start Date: 1/3/2008 - End Date: 1/3/2008	SSPI	1/11/2008 07:20 AM
Added template 1 to THE GRID . Location Code: CAREER - Start Date: 1/3/2008 - End Date: 5/31/2008	SSPI	12/11/2007 01:54 PM

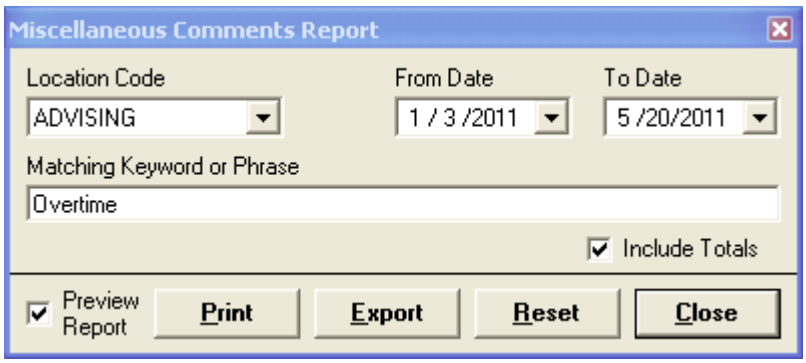
38.2 Miscellaneous Comments Report

Use this report to review administrative record keeping information, such as time and attendance data, that has been entered in the Miscellaneous column in Quick Day Change.

The report displays, for each advisor in a selected Location and date range, the name of the advisor, the date and time of the cell containing the Comment, and full text of the comment. If selected, the total number of aggregate hours containing miscellaneous comments will also be listed for each advisor.

For comments occurring on the same date, only the first date in the series will be printed. The report uses automatic page breaks to start a new page for each advisor in the selected Location.

Here is an example of the setup screen used to generate the MISCELLANEOUS COMMENTS REPORT.



The following options appear on this screen:

- LOCATION CODE: Use to select the department on which to be reported. The list will include all locations to which the user has access, including deleted locations.
- FROM DATE: Use to establish the first date of a date range on which to be reported.
- TO DATE: Use to establish the last date of a date range on which to be reported.
- MATCHING KEYWORD OR PHRASE: Use to refine the list to show only those entries that contain the selected word or phrase.
- INCLUDE TOTALS: Use to include the total amount of time that each advisor devoted to the selected activity.
- PREVIEW REPORT: Use to display a report on the screen prior to or in lieu of printing.
- PRINT: Use to initiate printing of the report.
- EXPORT: Use to save a selected report in an alternate format, which can be stored in a designated directory. The alternate formats include PDF Files (*.PDF), Excel Files

(*.XLS), Text Files (*.CSV), HTML Files (*.HTM), Rich Text Files (*.RTF), Tiff Files (*.TIF), and Raw Data (*.CSV).

- RESET: Use to restore all of the report set-up screen selections to the initial defaults.
- CLOSE: Use to exit the screen.

38.2.1 Set up the Miscellaneous Comments Report for Viewing or Printing

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on SYSTEM ADMINISTRATION REPORTS to display a list of available reports.
4. Click on MISCELLANEOUS COMMENTS REPORT to display the setup screen.
5. Click on LOCATION CODE ▼ and select the Location to be covered by the report. The list will include all locations to which the user has access, including deleted locations.
6. Click on the FROM DATE field and type in the first date to be covered by the report, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)
7. Click on the TO DATE field and type in the last date to be covered by the report, or click on ▼ to use the Date Picker.
8. Enter a word or phrase in the MATCHING KEYWORD OR PHRASE field to generate results containing only that keyword or phrase.
9. If desired, click on INCLUDE TOTALS to have the report list the total amount of time devoted to a selected activity for each advisor.
10. Preview, print or export the report. (See “View, Print and Export Reports” in Section 40.)
11. Click on CLOSE or, if desired, click on RESET to restore the screen to its initial settings.

Here is an example of the MISCELLANEOUS COMMENTS REPORT with INCLUDE TOTALS checked.

Miscellaneous Comments Report

1/3/2011 – 5/20/2011

Name	Date	Time	Miscellaneous Comments
ABRAHAM LINCOLN	1/5/2011	7:30 AM	OVERTIME
ABRAHAM LINCOLN		8:00 AM	OVERTIME
ABRAHAM LINCOLN	10/6/2011	6:30 PM	OVERTIME
ABRAHAM LINCOLN		7:00 PM	OVERTIME
ABRAHAM LINCOLN		7:30 PM	OVERTIME
ABRAHAM LINCOLN	1/20/2011	7:30 AM	OVERTIME
ABRAHAM LINCOLN		8:00 AM	OVERTIME
ABRAHAM LINCOLN	1/20/2011	6:30 PM	OVERTIME
ABRAHAM LINCOLN		7:00 PM	OVERTIME
ABRAHAM LINCOLN		7:30 PM	OVERTIME
ABRAHAM LINCOLN	4/4/2011	7:30 AM	OVERTIME
ABRAHAM LINCOLN		8:00 AM	OVERTIME
ABRAHAM LINCOLN	4/5/2011	6:30 PM	OVERTIME
ABRAHAM LINCOLN		7:00 PM	OVERTIME
ABRAHAM LINCOLN		7:30 PM	OVERTIME
ABRAHAM LINCOLN	4/19/2011	7:30 AM	OVERTIME
ABRAHAM LINCOLN		8:00 AM	OVERTIME
ABRAHAM LINCOLN	5/9/2011	6:30 PM	OVERTIME
ABRAHAM LINCOLN		7:00 PM	OVERTIME
ABRAHAM LINCOLN		7:30 PM	OVERTIME
ABRAHAM LINCOLN	5/16/2011	7:30 AM	OVERTIME
ABRAHAM LINCOLN		8:00 AM	OVERTIME

TOTAL FOR ABRAHAM LINCOLN: 11.0 Hours

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SECTION 39 – TABLE REPORTS

39.0 Overview

This Section covers the standardized table reports, all of which are available from SARS·REPORTS – TABLE REPORTS. To access these reports:

1. Click on REPORTS on the SARS·MENU.
2. Click on REPORTS on the SARS·REPORTS menu.
3. Click on TABLE REPORTS to display a menu of available reports:

   The list that follows is a table of contents for Section 39.

39.1 Access Codes Report

Use this report to obtain a list of access rights for each ACCESS CODE for the selected Location.

The report displays for each ACCESS CODE category the corresponding access designations in the following areas: SARS GRID, REPORTING, MY GRID, SARS UTIL, and Miscellaneous. Here is an example of the first page of the ACCESS CODES Report.

Access Codes Report

Access Code	System Permissions		
Advisor	**THE GRID**☐ ☑ Access ☑ Access Future Data View ☐ Change Data in HistoryData View ☐ Change Schedule Codes ☐ Schedule Appointments **Reporting** ☐ Print Operational and Table Reports ☐ Print Statistical Reports	**MY GRID**☐ ☑ Access ☑ Access Future Data View ☑ Access Notes ☑ Change Data in History Data View ☑ Change Reason Codes ☑ Change Schedule Codes (Appointment Allowable) ☑ Change Schedule Codes (Non-Appointment Allowable) ☑ Record Attendance ☑ Schedule Appointments	**SARS UTIL**☐ ☐ Access ☐Add Master Schedule ☐Master Schedule Maintenance ☐ Short Name Maintenance ☐ Student Maintenance ☐ Table Maintenance ☐ User Name Maintenance **Miscellaneous** ☑ Access Additional Information ☑ Add Drop-ins ☐Delete Notes ☐Exchange ☐ Meeting Maker ☑ Roll ☑ View Appointment Comments ☑ View Appointment Reasons ☑ View Student History

39.2 Excluded Dates Report

Use this report to obtain a list of dates and corresponding descriptions that are normally excluded from appointment scheduling.

The report displays DATE and DESCRIPTION.

Here is an example of the EXCLUDED DATES Report.

Excluded Dates Report

Date	Description
1/17/2011	Martin Luther King. Jr. Day
2/21/2011	President's Day
3/14/2011	Spring Break
3/15/2011	Spring Break
3/16/2011	Spring Break
3/17/2011	Spring Break
3/18/2011	Spring Break
5/30/2011	Memorial Day
7/4/2010	Independence Day
11/24/2011	Thanksgiving
11/25/2011	Thanksgiving

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39.3 Location Codes Report

Use this report to obtain a list of the various department groupings.

The report displays LOCATION CODE and corresponding DESCRIPTION.

Here is an example of the LOCATION CODES Report.

Location Codes Report

Location Code	Description
ADVISING	Advising Center
CAREER	Career Services
TRANSFER	Transfer Center
TUTORING	Tutoring Center

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39.4 Reason Codes Report

Use this report to obtain a list of the reasons why students request appointments with advisors for the selected Location.

The report displays Reason Codes and their associated Descriptions and Group Codes.

Here is an example of the REASON CODES Report.

Reason Codes Report

Reason Code	Description	Group Code
ADD/DROP	Add/Drop to Current Schedule	DROPIN
ADVISING	General Advising	DROPIN
CAREER	Career Advising	DROPIN
ED PLAN	Educational Plan	
GRAD	Graduation Application	
MAJOR	Change of Major	DROPIN
ORIENTATION	New Student Orientation	
PERSONAL	Personal Issue	DROPIN
PROBATION	Probation Advising	
STAFF CXL	Cancelled at Request of Staff	
STUDENT CXL	Cancelled at Request of Student	
TRANS EVAL	Transcript Evaluation	
TRANSFER	Transfer Advising	DROPIN
WKSHP-STUDY SKL	Study Skills Workshop	
WKSHP-$	Show Me the Money Workshop	

39.5 Reason Code Group Codes Report

Use this report to obtain a list of REASON CODE groupings for the selected Location.

The report displays GROUP CODE and DESCRIPTION for each group.

Here is an example of the REASON CODE GROUP CODES Report.

Reason Code Group Codes Report

Group Code	Description
DROP-IN	Reasons Available for Drop-in Visits
ESARSAPP	Reasons Available for eSARS Individual Appointments
ESARSCX	eSARS Appointment Cancellation Reasons
ESARSGP	Reasons Available for eSARS Group Appointments

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39.6 Schedule Codes Report

Use this report to obtain a list of codes that represent advisor activities for the selected Location.

The report displays SCHEDULE CODES along with their corresponding DESCRIPTIONS, whether the codes allow appointments, and the maximum number of students allowed in the appointment. It also displays the following default settings for each Schedule Code: Print Reminder, Pull File, Default Attendance, Require Initials, Allow Meeting, Valid Meeting Code, Duration, Cell Color, Font Color and Style, Group, and Clear Reasons.

An example of the SCHEDULE CODES Report is displayed on the following page.

Schedule Codes Report

Schedule Code	Description	Allow Appt	Max # Stds	Print Remd Default	Pull File Default	Default Attend	Require Initials	Allow Mtg	Valid Mtg Code	Dur	Cell (Color) / Font (Color, Bold, Italic)	Group	Clear Reasons
////	Off Duty	☐						☐	☐	30			☐
BOOKED	Booked Appointment - Attendance Not Marked	☐					Yes	☐	☐	30		ST CONTACT	☐
CLASS	Teaching Class	☐						☐	☐	30		ST CONTACT	☐
CLOSED	Office Closed	☐						☐	☐	30			☐
CONF	Conference	☐						☐	☐	30		ADMIN	☐
DROPIN	Drop-in Session	☐						☑	☐	30		ST CONTACT	☐
LUNCH	Lunch	☐						☐	☐	30		PERSONAL	☐
MTG	Meeting	☐						☐	☑	30		ADMIN	☐
NOSHOW	Not Attended	☐					Yes	☐	☐	30		ST CONTACT	☐
OPEN	Open Appointment	☑	1	Yes	Yes	Not Mkd	Yes	☑	☐	30		ST CONTACT	☐
ORIENT	Orientation	☑	50	No	No	Not Mkd	Yes	☐	☐	120		ST CONTACT	☐
PREP	Preparation Time	☐						☑	☐	30		ADMIN	☐
SHOWED	Attended	☐					Yes	☐	☐	30		ST CONTACT	☐
SICK	Sick/Medical Appointment	☐						☐	☐	30		PERSONAL	☐

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39.7 Schedule Code Group Codes Report

Use this report to obtain a list of SCHEDULE CODE groupings for the selected Location.

The report displays GROUP CODE and DESCRIPTION for each group.

Here is an example of the SCHEDULE CODE GROUP CODES Report.

Schedule Code Group Codes Report

Group Code	Description
ADMIN	Administrative Time
ESARSAPPT	eSARS Appointment (individual)
ESARSGROUP	eSARS Appointment (Group)
PERSONAL	Personal Time
ST CONTACT	Student Contact Time

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39.8 Short Names Report

Use this report to obtain a list of advisors for the selected Location.

The report displays SHORT NAME, FULL NAME, TITLE, GROUP, ROOM NO, and INACTIVE status for every advisor.

Here is an example of the SHORT NAMES Report.

Short Names Report

Short Name	Full Name	Title	Group	Room No	Active
ADAMS	JOHN ADAMS	ADVISOR	ATHLETES	SC-1	Yes
BUCHANAN	JAMES BUCHANAN	ADVISOR	VETRANS	SC-2	Yes
LINCOLN	ABRAHAM LINCOLN	DEAN	PROBATION	SC-3	Yes
MADISON	JAMES MADISON	ADVISOR	INTERNATL, VIETNAMIESE	SC-4	Yes
PIERCE	FRANKLIN PIERCE	COUNSELOR		SC-5	Yes
POLK	JAMES K. POLK	ADVISOR	BUSINESS, COMP SCI	SC-6	Yes
ROOSEF	FRANKLIN DELANO ROOSEVELT	ADVISOR	SPANISH	SC-7	Yes
ROOSEVT	THEODORE ROOSEVELT	ADVISOR	ENGINEER	SC-8	Yes
TAYLOR	ZACHARY TAYLOR	COUNSELOR		SC-9	No
TYLER	JOHN TYLER	ADVISOR	NURSING	SC-10	Yes

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39.9 Specialty Group Codes Report

Use this report to obtain a list of advisor groupings for the selected Location.

The report displays GROUP CODE and DESCRIPTION for each group.

Here is an example of the SPECIALTY GROUP CODES Report.

Specialty Group Codes Report

Group	Description
ADJUNCT	Assigned to Drop-in
ATHLETES	School Athletes
BUSINESS	Business Major
COMP SCI	Computer Sciences Major
ENGINEER	Engineering Major
INTL	International Students
MATHLAB	Math Lab Tutors
NURSING	Nursing Majors
PROBATION	Probation Students
SPANISH	Spanish-Speaking
VETS	Advise Veterans
VIETNAMESE	Vietnamese-Speaking

39.10 User Names Report

Use this report to obtain a list of people who are authorized to use all or part of the system as well as the class of users and all locations to which they are assigned.

The report displays User Name, Full Name, Short Name, Location Code(s) and Access Code(s), with the primary access code identified.

Here is an example of the USER NAMES REPORT.

User Names Report

User Name	Full Name	Short Name	Location Code	Access Code
ALINCOLN	Abraham Lincoln	LINCOLN		
			ADVISING	MANAGER ☑
			CAREER	MANAGER ☑
			TRANSFER	MANAGER ☑
FPIERCE	Franklin Pierce	PIERCE		
			ADVISING	ADVISOR ☑
			CAREER	VIEW NOTES HIST ALRT ☑
			TRANSFER	VIEW NOTES HIST ALRT ☑
FROOSEVE	Franklin D. Roosevelt	ROOSEF		
			ADVISING	ADVISOR ☑
			CAREER	VIEW NOTES HIST ALRT ☑
			DSS	ADVISOR ☑
			TRANSFER	VIEW NOTES HIST ALRT ☑
HSMITH	Helen Smith	NONE		
			ADVISING	SCHEDULER ☑
JBUCHANA	James Buchanan	BUCHANAN		
			ADVISING	VIEW NOTES HIST ALRT ☑
			CAREER	VIEW NOTES HIST ALRT ☑
			TRANSFER	ADVISOR ☑

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39.11 Short Name Assignments Report

Use this report to obtain a list of advisors for a selected Location that shows the alphabetical student assignments for each advisor.

The report displays Short Name, Full Name, Start Name, End Name, and an indication of whether the advisor is active for the selected Location or not.

Note
This report option is available from the Table Report Menu only if the USE SHORT NAME ASSIGNMENTS feature is selected in Location Properties.

Here is an example of the SHORT NAME ASSIGNMENTS REPORT.

Short Name Assignments Report

Short Name	Full Name	Start Name	End Name	Active
TAYLOR	Zachary Taylor			☐
ROOSEF	Franklin Delano Roosevelt			☐
ROOSEVT	Theodore Roosevelt			☐
TYLER	John Tyler			☐
ADAMS	John Adams			☐
BUCHANAN	James Buchanan	A	CARP	☑
FILLMORE	Millard Fillmore	FEE	IAL	☑
JEFFERSN	Thomas Jefferson	IAM	LAT	☑
LINCOLN	Abraham Lincoln	LAU	OND	☑
MADISON	James Madison	ONE	RAM	☑
PIERCE	Franklin Pierce	RAN	TAM	☑
POLK	James K. Polk	TAN	Z	☑

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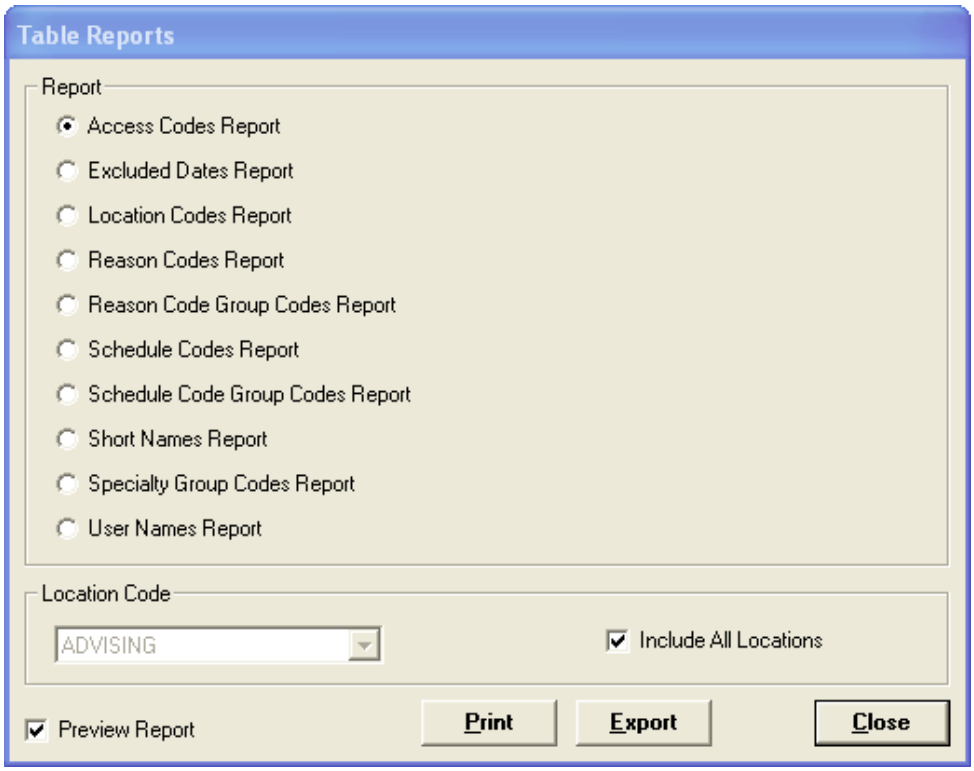
39.12 View and Print a Table Report

Table Reports do not have setup screens. They can be accessed for viewing and printing directly from the reports menu.

1. Click on REPORTS on the SARS·MENU.

2. Click on REPORTS.

3. Click on TABLE REPORTS. The following selection screen will be displayed:



4. In the REPORT panel, click on the desired report.

5. In the LOCATION CODE panel, click on the desired location.

6. [For the Access Codes Report only] If desired, click on INCLUDE ALL LOCATIONS.

7. To print without first viewing the report on screen, click on PRINT. A print screen will appear. Click on PRINT or OK.

8. To view the report on screen, click on PREVIEW REPORT and then click on PRINT. A preview of the selected report will be displayed. To make the screen display larger or smaller, click on the + or the – at the top of the preview report screen.

   a. To print, click on the print icon at the top. A print screen will be displayed. Click on PRINT or OK.

   b. To close the screen, click on the X at the upper right of the screen, or click on the icon to the left of the report title and then click on CLOSE. Then click on CLOSE on the report setup screen.

SECTION 40 – VIEW, PRINT AND EXPORT REPORTS

40.1 View and Print a Report

1. Click on REPORTS on the SARS·MENU.

2. Click on REPORTS. A list of reports will be displayed on the drop-down menu.

3. Click on the selected report. The setup screen for the selected report will appear.

4. Make your selections.

5. To print without first viewing the report on screen, click on PRINT. A print screen will appear. Click on PRINT or OK.

6. To view the report on screen, click on PREVIEW REPORT and then click on PRINT. A preview of the selected report will be displayed. To make the screen display larger or smaller, click on the + or the – at the top of the preview report screen.

   a. To print, click on the print icon at the top. A print screen will be displayed. Click on PRINT or OK.

   b. To close the screen, click on the X at the upper right of the screen, or click on the icon to the left of the report title and then click on CLOSE. Then click on CLOSE on the report setup screen.

40.2 Export a Report to an Alternate Format

In addition to previewing and printing a report within the SARS·GRID application, an option exists to export a report to an alternate format. All reports can be exported to one of the following formats:

PDF Files (*.PDF)
Excel Files (*.XLS)
Text Files (*.CSV)
HTML Files (*.HTM)
Rich Text Files (*.RTF)
Tiff Files (*.TIF)
Raw Data (*.CSV).

1. Click on REPORTS on the SARS·MENU.

2. Click on REPORTS. A list of reports will be displayed on the drop-down menu.

3. Click on the selected report. The setup screen for the selected report will appear.

4. Make your selections.

5. Click on EXPORT. A SAVE REPORT screen will be displayed.

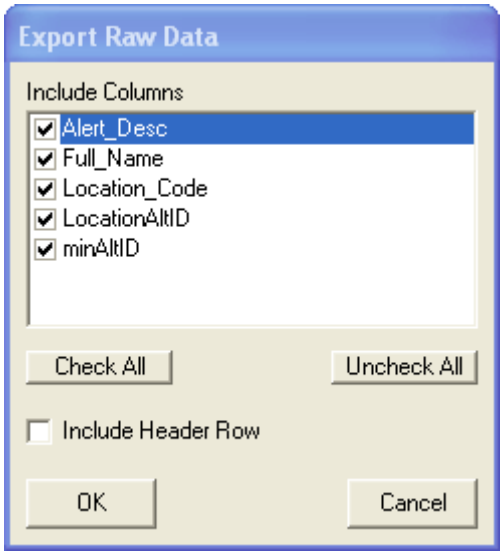
6. Click on SAVE IN ▼ and then select the location in which the report will be stored.

7. In the FILE NAME field, type in a file name for the report.

8. Click on SAVE AS TYPE ▼ and then select the format in which the report will be saved.

9. Click on SAVE.

10. If Raw Data (*.CSV) is selected, an Export Raw Data screen will be displayed showing a list of columns that are contained in that particular report. Here is an example of the screen that is displayed when exporting the Alerts Report:



The options are:

- INCLUDE COLUMNS: Use to select the data elements to be exported. All data elements available in any given report will be available for selection. The data elements displayed on the list will vary, depending on the report that is being exported.
- CHECK ALL: Use to select all data elements for the selected report.
- UNCHECK ALL: Use to de-select all data elements that are available for the selected report.
- INCLUDE HEADER ROW: Use to include the title of each column exported.
- OK: Use to approve the selections.
- CANCEL: Use to undo the selections.

a. The default is that all data columns will be checked for export. To de-select a column, click on the checkbox for the data element that should not be exported.

b. Click on the Include Header Row checkbox if you want the column titles to be exported, as well.

c. Click on OK. The report will be available for use in the selected format.

PART VII – TECHNICAL ISSUES

This Part is intended for use primarily by technical staff. It contains the following Sections:

SECTION 41 – SARS·GRID UPGRADES

41.0 Overview

This Section provides information about application upgrades and workstation upgrades for SARS·GRID.

Periodically, SARS Software Products, Inc. will distribute upgrades to current users of SARS·GRID via the internet. An applications upgrade is installed on the server, while a workstation upgrade is installed on workstation/client PCs. The college may elect one of two methods for installing updates: Automatic Mode or Manual Mode.

41.1 Automatic Mode

With the automatic mode, no staffing is required. The following procedures occur:

1. SARS Software Products, Inc. places updates on its Update Server.

2. The SARS automatic update feature that resides on the college server checks nightly with the SARS Update Server.

3. When updates are found, they are automatically downloaded.

4. The SARS Update Server sends an e-mail to technical staff and the end-user liaison, notifying of the successful update and providing the link to our website's Product Updates section where information about the enhancements is posted.

5. Our database records the event in detail.

6. Updates are automatically propagated to the client PCs when they next log into SARS.

In those instances when the update requires a database change, the SARS update program downloads the script, placing it on the college's SARS server. The DBA at the college runs the SQL script to modify the database, and the update process will automatically occur the next evening.

No down time is required. Enhancements and patches have been fully tested prior to their release.

41.2 Manual Mode

If the college elects not to use the automatic process, the following procedures occur:

1. The SARS Update Server sends an e-mail notification of the updates to designated technical staff and the end-user liaison.

2. Technical staff performs the update manually by running the SARS update utility and clicking on the Update button, or schedules time for SARS Software Products, Inc. to perform the update for them. (In those instances when the update requires a database change, the SARS update program downloads the SQL script to modify the database, placing it on the college's SARS server. The DBA at the college runs the script to update

the database. Then, technical staff clicks on the Update button to complete the update process.)

3. When the update is completed, the SARS Update Server sends an e-mail to technical staff and the end-user liaison with a link to our website where information about the enhancements is posted.

4. Updates are automatically propagated to the clients PCs when they next log into SARS.

No download time is required. Enhancements and patches have been fully tested prior to their release.

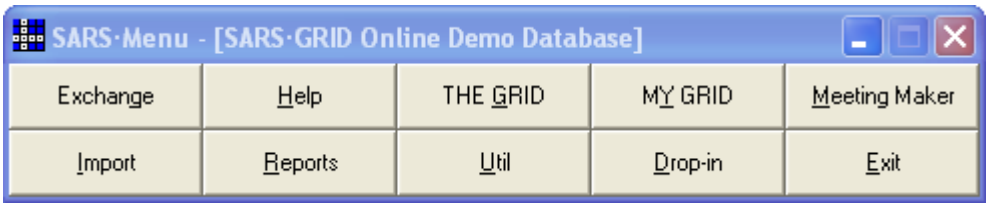
41.3 Workstation Upgrades

When a school's server receives an automatic upgrade of the SARS·GRID program via the internet, the server will automatically propagate the upgrade to all client work stations. An on-screen message will inform users when they first log on to their PC's after the upgrade that the application has been upgraded.

SECTION 42 – IMPORT STUDENT DATA

42.0 Overview

This Section covers instructions for importing student data from other databases maintained by the school into the SARS Database. SARS·IMPORT is a separate program that is available to users who have been assigned MISCELLANEOUS - EXCHANGE access rights. For those users, the SARS·MENU will look like this:



Computer support staff, as well as the System Administration, may use the SARS·IMPORT program to import student data and classes from the school's databases into SARS·GRID. This will eliminate the need to re-enter existing data and minimize data entry errors when scheduling appointments. SARS·IMPORT adds the extracted data to the SARS Database.

The application is used to specify the order in which data elements will be imported, to modify data elements to conform to different formats or values as necessary, and to initiate or schedule the import process.

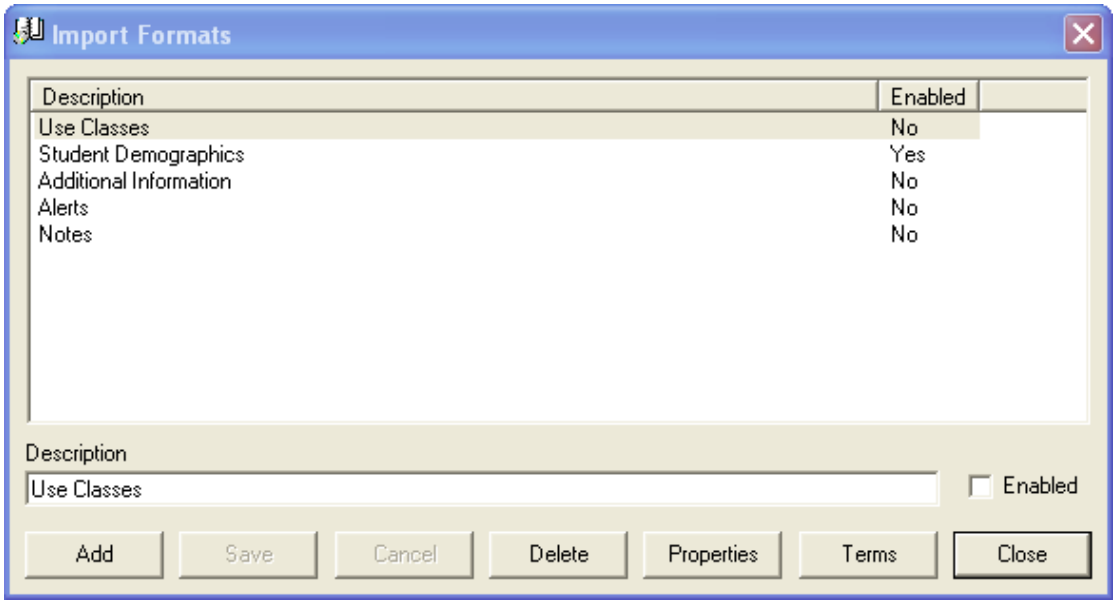
Note Contact SARS Software Products, Inc. for initial configuration of SARS·IMPORT and SARS·EXPORT

The export processes using SARS·EXPORT are discussed in Section 43.

42.1 Set up an Import Format

Before scheduling an import for the first time, the user must log on to the computer under the Windows account (e.g., the Windows user name and password) that will be used to run the scheduled task, and then log in SARS·GRID.

1. Click on the IMPORT button on the SARS MENU. An IMPORT FORMATS screen will be displayed. Here is an example:



The following options appear on this screen:

- DESCRIPTION: Use to establish a name of the import format (e.g., Students, Classes, etc.).
- ENABLED: Use to control whether the import format will be processed by the AUTO·IMPORT utility.
- ADD: Use to add import format descriptions to the list.
- SAVE: Use to store a new import format description.
- CANCEL: Use to undo an action or entry that has not yet been saved.
- DELETE: Use to delete an import format description.
- PROPERTIES: Use to gain access to the IMPORT SPECIFICATIONS screen for the selected import format.
- TERMS: Use to gain access to the TERM MAINTENANCE screen to select the applicable term for the import format.
- CLOSE: Use to exit the SARS·IMPORT program.

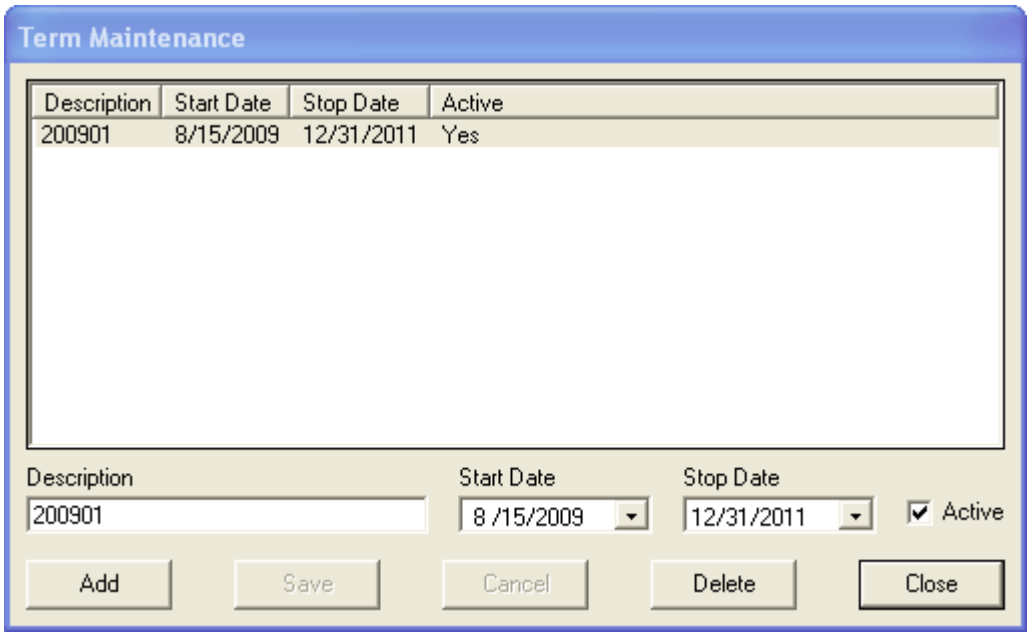
2. Click on ADD to enable the Description field.

3. In the Description field, type in the name of the import format (e.g. Students or Classes). The field will accept up to 255 characters.

4. If the import format is to be imported using the AUTO IMPORT UTILITY, click on ENABLED. Otherwise, leave that checkbox blank. (See Section 42.4.2 in this Part.)

5. Click on SAVE.

6. With the desired import format highlighted, click on TERMS to display a TERM MAINTENANCE screen. Here is an example:



The options are:

- DESCRIPTION: Use to enter a descriptor for the term.
- START DATE: Use to select the first date of the term.
- STOP DATE: Use to select the last date of the term.
- ACTIVE: Use to specify that the selected term is active.
- ADD: Use to enable the Term Maintenance fields for entry of a new term.
- SAVE: Use to store the entered data.
- CANCEL: Use to cancel the entered date.
- DELETE: Use to delete a term from the list.
- CLOSE: Use to exit the screen.

To add a new term,

a. Click on ADD.

b. Click on the DESCRIPTION field and type in a description of the new term to be added.

c. Select the first date of the term by using one of the methods below:

   i. Click on the START DATE field and type in the desired date.

   Tips
   - Click on the displayed month and type the number representing the desired month.
   - Click on the displayed day and type the number representing the desired day.
   - Click on the displayed year and type the number representing the desired year.

   ii. Click on START DATE ▼ to display a popup calendar and then click on the desired date, which will be inserted in the FROM DATE field.

   Tips
   - Click on ◄ to display the previous month.
   - Click on ► to display the next month.
   - Click on the name of the month to display a drop down list with 12 months of the current year.
   - Click on the year to display an up arrow ▲ and down arrow ▼. Clicking on the up arrow ▲ displays the same month in the next year. Clicking on the down arrow ▼ displays the same month in the previous year.

d. Select the last date of the term by using one of the methods below:

   i. Click on the STOP DATE field and type in the desired date.

   ii. Click on STOP DATE ▼ to display a popup calendar and then click on the desired date, which will be inserted in the TO DATE field.

e. Click on the ACTIVE checkbox to specify that the term is currently active.

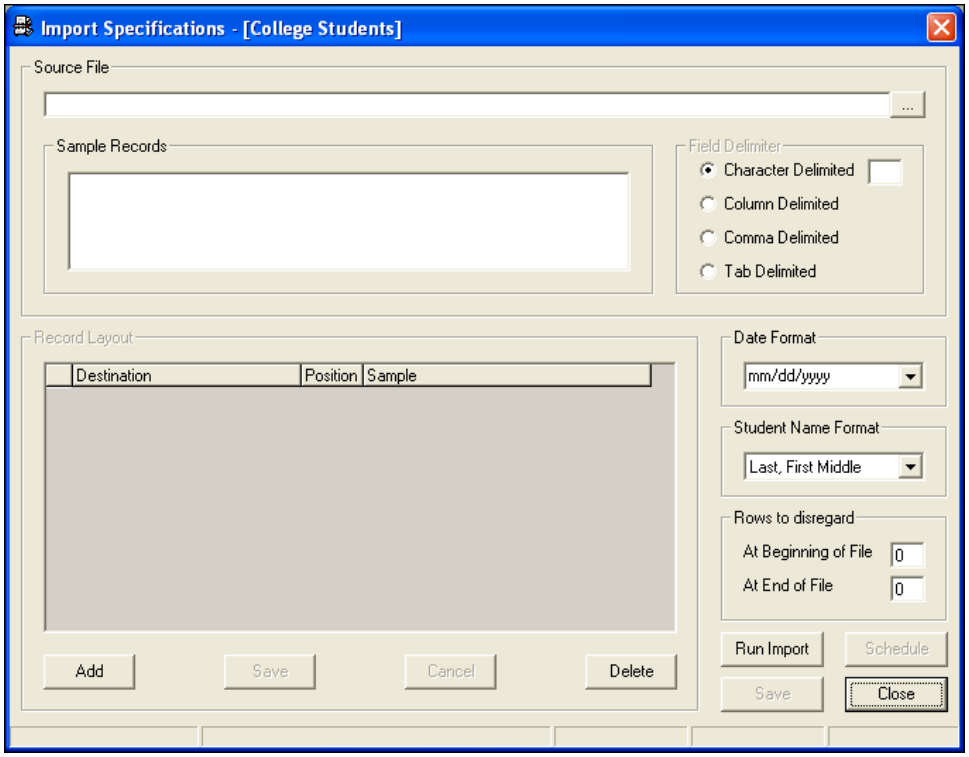
f. Click on SAVE to store the entries.

g. Repeat steps a. – f. to add other Terms.

h. Click on CLOSE to exit the screen.

7. With the desired import format highlighted, click on PROPERTIES to display the IMPORT SPECIFICATIONS screen.

Here is an example:



The initial option to be selected is:

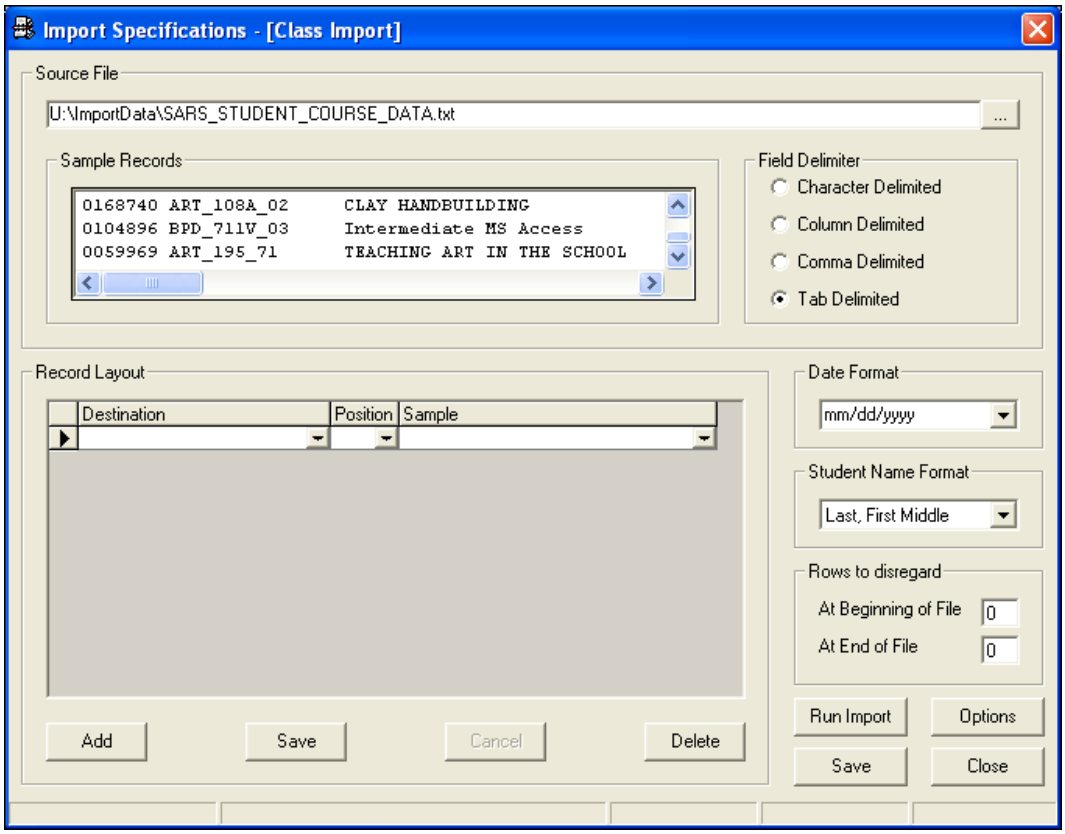
- SOURCE FILE: Use to specify the drive and directory of the file to be imported.

8. Click on SOURCE FILE … and then browse on the LOCATE DATA FILE screen to find the drive and directory of the file to be imported.

9. Double-click on the desired file. The name of the file will be displayed in the SOURCE FILE field, and the first 100 records will be made available in the SAMPLE RECORDS field.

Note
Several records are provided in the event that certain data elements are contained within some, but not all of the examples.

Here is an example of the IMPORT SPECIFICATIONS screen with a Source File selected and the first three sample records displayed:



The remaining options are:

- SAMPLE RECORDS: Use to view the manner in which the records will be displayed, based on the type of Field Delimiter selected.
- FIELD DELIMITER: Use to specify the manner in which data are separated in the source file.

  CHARACTER DELIMITED: Use if a special character (such as **|**) separates the data elements in the source file.

  COLUMN DELIMITED: Use if the data elements in the source file are aligned on columns.

  COMMA DELIMITED: Use if commas separate the data elements in the source file.

  TAB DELIMITED: Use if tabs separate the data elements in the source file.
- RECORD LAYOUT:

  ADD: Use to create a blank data line in the RECORD LAYOUT sub-screen so that a data element can be added.

  SAVE: Use to store the data lines in the RECORD LAYOUT sub-screen.

CANCEL:	Use to undo an action that has not yet been saved in the Record Layout sub-screen.
DELETE:	Use to delete the selected data element in the Record Layout sub-screen.
• DATE FORMAT:	Use to select the format for dates.
• STUDENT NAME FORMAT:	Use to select the format for students' names.
• ROWS TO DISREGARD:	Use to instruct the system to ignore any rows at the beginning or end of the data file that do not contain student data (e.g., headings and footers).
AT BEGINNING OF FILE:	Use to specify the number of rows to disregard at the front of the file.
AT END OF FILE:	Use to specify the number of rows to disregard at the end of the file.
• RUN IMPORT:	Use to manually initiate the import process for the selected file.
• OPTIONS:	Use to display an IMPORT OPTIONS screen for making additional global selections.
• SAVE:	Use to store the selected settings on the IMPORT SPECIFICATIONS screen.
• CLOSE:	Use to exit the screen.

10. Click on DATE FORMAT ▼ and select the desired format for dates. If the desired format is not on the list, type it into the field.

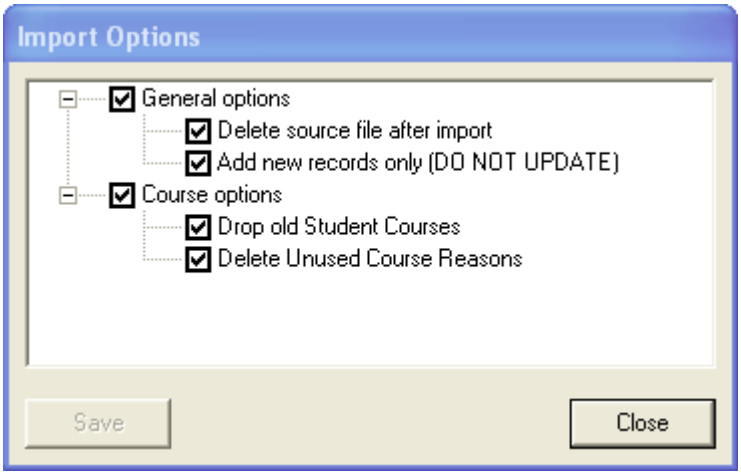
11. [Applicable only if student first, middle and last names in the school's database are separate data elements] Click on STUDENT NAME FORMAT ▼ and select the desired layout for student names. The recommended option is: **Last, First Middle**.

12. [If applicable] In the ROWS TO DISREGARD section, click on the text box adjacent to AT BEGINNING OF FILE and type in the number of rows at the beginning of the import file that should not be included in the import.

13. [If applicable] In the ROWS TO DISREGARD section, click on the text box adjacent to AT END OF FILE and type in the number of rows at the end of the import file that should not be included in the import.

14. Click on OPTIONS to display an IMPORT OPTIONS screen.

Here is an example:



The options are:

- GENERAL OPTIONS:

DELETE SOURCE FILE AFTER IMPORT:	[Recommended] Use to delete the selected Source File after its data has been imported.
ADD NEW RECORDS ONLY (DO NOT UPDATE):	[Optional] Use to have the import program find and add only those records that have not yet been imported.
AUTO MERGE DUPLICATE STUDENTS:	[DO NOT USE.]

- COURSE OPTIONS:

DROP OLD STUDENT COURSES:	[DO NOT USE.]
DELETE STUDENT COURSE DATA:	[Recommended] Use to clear out old student-specific course data so that student-specific course data for the new term can be imported. Must be checked to track student class drops.
DELETE UNUSED COURSE REASONS:	[Optional] Use to delete to any course reasons that are not being used.

- SAVE: Use to store the selections.
- CLOSE: Use to exit the screen.

a. Under GENERAL OPTIONS, click on the checkbox adjacent to each option that is desired, or click on the checkbox adjacent to GENERAL OPTIONS to check all boxes.

b. Under COURSE OPTIONS, click on the checkbox adjacent to each option that is desired, or click on the checkbox adjacent to COURSE OPTIONS to check all boxes.

c. Click on SAVE.

d. Click on CLOSE to return to the IMPORT SPECIFICATIONS screen.

15. Click on SAVE to store the selected settings.

At this point, each data element must be configured in the RECORD LAYOUT sub-section, depending on the manner in which the data elements in the records are separated.

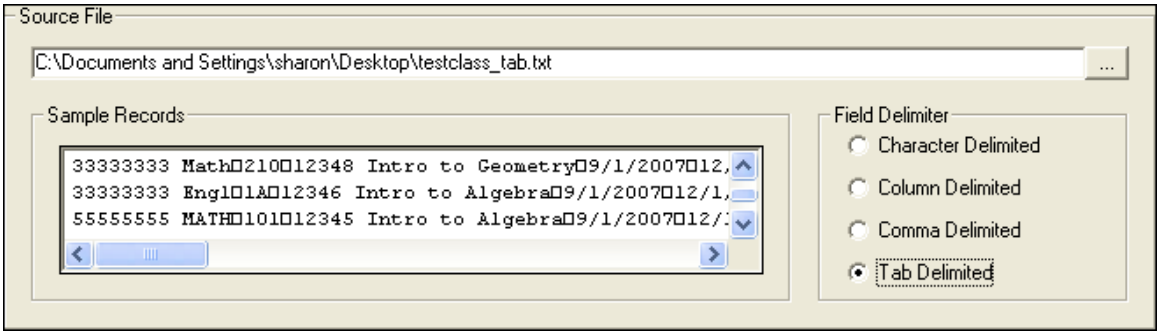
The options are:

- Character Delimited
- Column Delimited
- Comma Delimited
- Tab Delimited

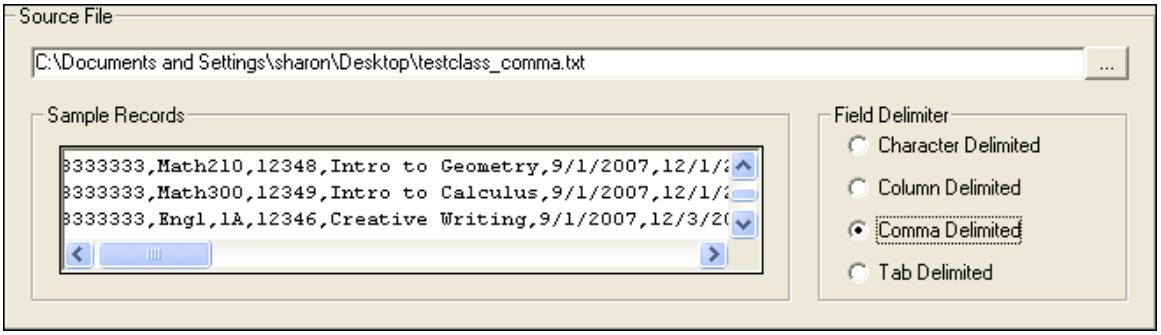
42.1.1 Set up Character-, Tab-, and Comma-Delimited Records

The steps for setting up an import format are the same for Character-, Tab-, and Comma-Delimited Records. If the sample records are Column-Delimited, go to Section 42.1.2 in this Part.

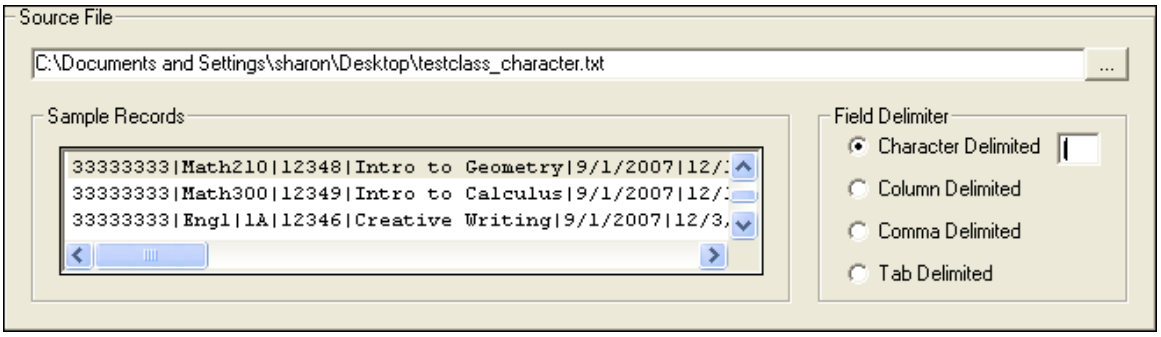
If a TAB separates the data elements of the source file, the sample records might look something like the following:



If a COMMA separates the data elements in the source file, the sample records might look something like the following:



If a CHARACTER (such as **|**) separates the data elements in the source file, the sample records might look something like the following:



1. From the IMPORT SPECIFICATIONS screen, click on one of the records in the SAMPLE RECORDS field.

2. Depending upon the manner in which the sample records are separated, in the FIELD DELIMITER panel:

   a. Click on TAB DELIMITED.

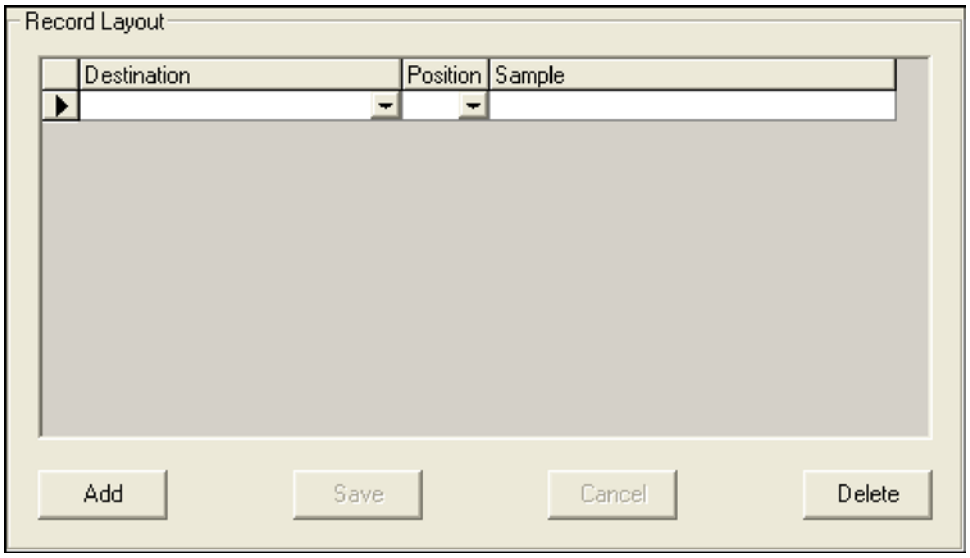
      -or-

   b. Click on COMMA DELIMITED.

      -or-

   c. Click on CHARACTER DELIMITED and then type in the specific character that is used to separate the data elements in the source file (e.g., **|**) in the adjacent text box.

3. Click on a sample record. When it is highlighted, the RECORD LAYOUT screen will be enabled. Here is an example:



The options are:

- DESTINATION: Use to select a data element from the drop-down list.
- POSITION: Use to select a position order for the selected data element.
- SAMPLE: Use to display a sample of the data element of the selected record as it will appear in SARS·GRID. Also use to modify the format or value of the data element.
- ADD: Use to add another line to receive a data element in the Record Layout field.
- SAVE: Use to save the Record Layout selections.
- CANCEL: Use to undo a line that has been added in the Record Layout fields.
- DELETE: Use to delete a selected data element in the Record Layout.

4. Click on ADD. A blank data line will be enabled.

5. Click on DESTINATION ▼ and select the data element to be inserted on this line. The options will include all of the data elements that are contained in the selected database, such as:

Student ID – Student ID	Email address
Student Name – Full	Additional Info [multiple options]
Birth Date	Alerts [multiple options]
Home Phone – Full	Notes [multiple options]
Contact Phone – Full	Courses – [multiple options]
Address 1	Instructor – School ID
City	Instructor – Name
State	Multiple Values (see note below)
Zip	Ignore

Notes
If the selected record does not contain a data element to be configured, click on a different one.

"Multiple Values" is available as an option for a data element that is comprised of more than one type of delimiter. It enables the user to modify the values. See "Sub Layouts" in Section 42.2.4 in this Part.

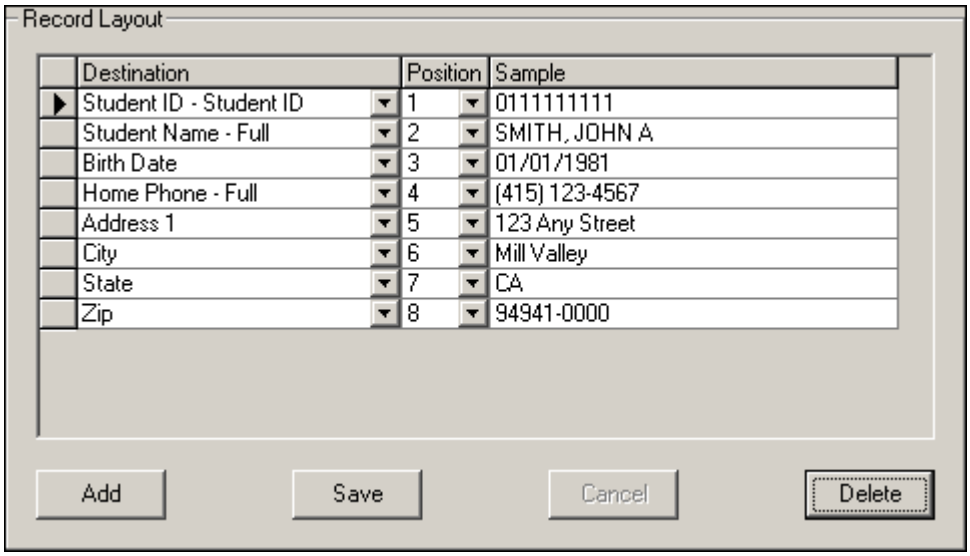
6. With the selected data element inserted into the DESTINATION field, click on POSITION ▼ and select the position number for the information.

7. Click on the adjacent SAMPLE field. An example of the data element will be displayed.

Note
To modify a data element, see "Modify Data Formats or Values" at Section 42.2 in this Part.

8. Repeat steps 4 – 7 until all data elements have been selected and configured.

Here is an example of a completed Record Layout for a Student Import using Character-Delimited records:



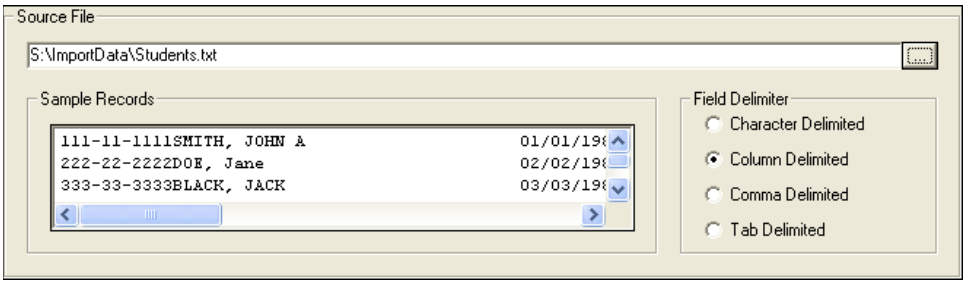
9. Click on SAVE.

10. Click on CLOSE to exit the IMPORT SPECIFICATIONS screen and return to the IMPORT FORMATS screen.

11. Click on CLOSE to exit the program.

42.1.2 Set up Column Delimited Records

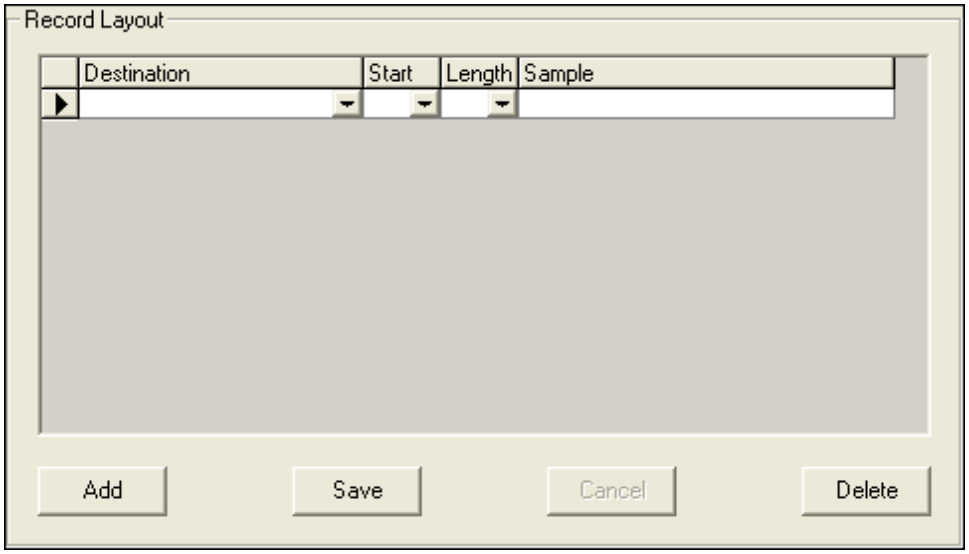
If the data elements in the source file are aligned using COLUMNS, the sample records might look something like the following:



1. From the IMPORT SPECIFICATIONS screen, click on one of the records in the SAMPLE RECORDS field.

2. In the FIELD DELIMITER section, click on COLUMN DELIMITED. A RECORD LAYOUT field will be enabled.

Here is an example:



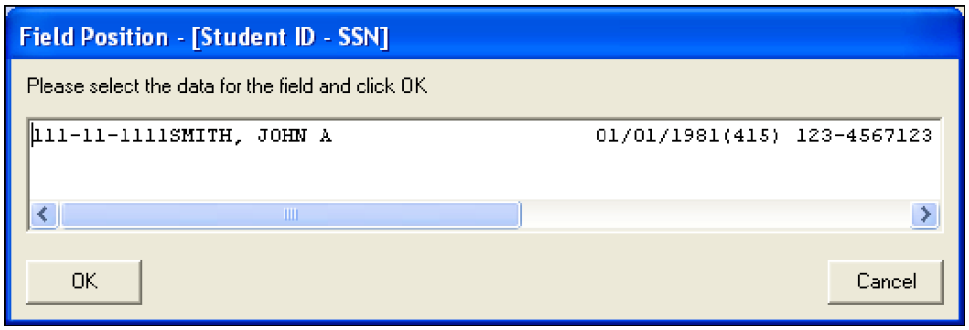
The options are:

- DESTINATION: Use to select a data element to be inserted.
- START: Use to specify the starting point of the data element. (This number is inserted automatically after the sample data element is selected on the Field Position screen.)
- LENGTH: Use to specify the length of the data element, in number of characters. (This number is inserted automatically after the sample data element is selected on the Field Position screen.)
- SAMPLE: Use to show an example of the data element. Also use to modify the format or value of the data element.
- ADD: Use to add another line to receive a data element in the Record Layout field.
- SAVE: Use to save the Record Layout selections.
- CANCEL: Use to undo a line that has been added in the Record Layout fields.
- DELETE: Use to delete a selected data element in the Record Layout.

3. Click on ADD. A blank data line will be enabled.
4. Click on DESTINATION ▼ and select a data element to be inserted into the first line of the Record Layout. The options will include all of the data elements that are contained in the selected database.

Note
If the selected record does not contain a data element to be configured, click on a different one.

5. With the selected data element inserted into the DESTINATION field, click on START ▼. A FIELD POSITION screen will be displayed. Here is an example:



6. While holding down the left mouse button, scroll to highlight the section of the line containing the related data field, including any blank space that follows (up to the beginning of the next data field). For example, if the Destination is Student Name, highlight the entire name plus all of the unused space comprising the Student Name data field to the right of the name.

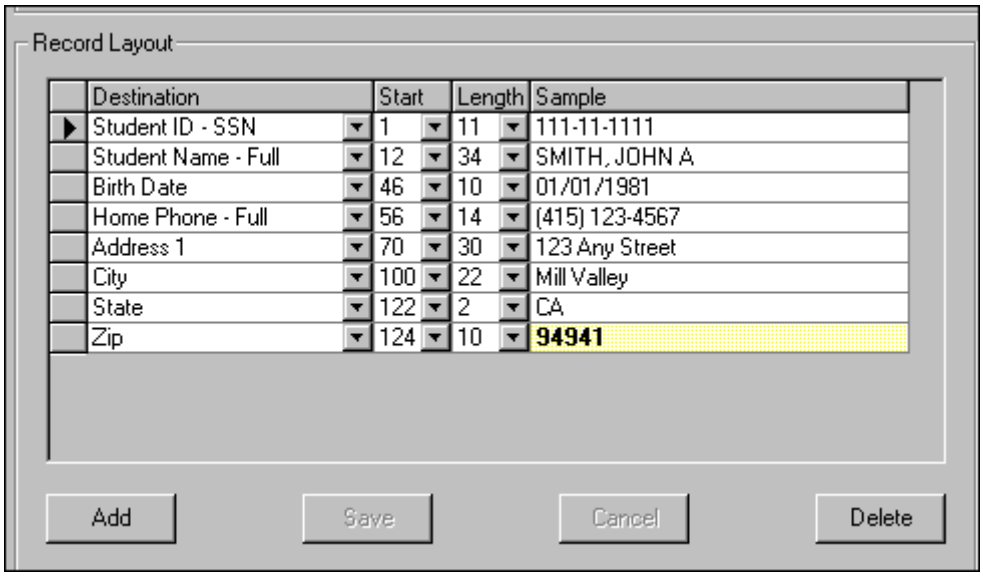
Note
Highlighting the entire blank space following a data element provides enough space for all data elements of this type.

7. Click on OK. The START, LENGTH, and SAMPLE fields will fill in automatically. The START field for the first line is 1, the LENGTH will be the total number of characters for the data element, and the SAMPLE field will show how the data element will be displayed.

Note
To modify a data element, see “Modify Data Formats or Values” at Section 42.2 in this Part.

8. Repeat steps 3 – 7 until all data elements have been selected and configured.

Here is an example of a completed Record Layout for a Student import using Column-Delimited records:



Destination	Start	Length	Sample
Student ID - SSN	1	11	111-11-1111
Student Name - Full	12	34	SMITH, JOHN A
Birth Date	46	10	01/01/1981
Home Phone - Full	56	14	(415) 123-4567
Address 1	70	30	123 Any Street
City	100	22	Mill Valley
State	122	2	CA
Zip	124	10	94941

9. Click on SAVE.

10. Click on CLOSE to exit the IMPORT SPECIFICATIONS screen and return to the IMPORT FORMATS screen.

11. Click on CLOSE to exit the program.

42.1.3 Set up Records for Importing Classes

Classes may be imported into the SARS database for any application that has been designated to Use Student Classes (see Section 4.5, Miscellaneous Settings). The process is identical to those described in Section 42.1 – 42.1.2, above, except that certain data elements must be present.

To create an import format and select and configure data elements to be used for classes, follow the steps below:

1. In SARS·GRID – UTIL – MISCELLANEOUS SETTINGS, be sure that the USE STUDENT CLASSES option is checked if classes are to be imported.

2. Click on the IMPORT button on the SARS MENU to display the IMPORT FORMATS screen.

3. If an import format for CLASSES has not yet been created, add one now (see Section 42.1 in this Part).

4. Click on the line containing the CLASSES import format.

5. Click on TERMS to display the Term Maintenance screen.

   To add a new term,

   a. Click on ADD.

b. Click on the DESCRIPTION field and type in a description of the new term to be added.

c. Select the first date of the term by using one of the methods below:

i. Click on the START DATE field and type in the desired date.

Tips
- Click on the displayed month and type the number representing the desired month.
- Click on the displayed day and type the number representing the desired day.
- Click on the displayed year and type the number representing the desired year.

ii. Click on START DATE ▼ to display a popup calendar and then click on the desired date, which will be inserted in the FROM DATE field.

Tips
- Click on ◄ to display the previous month.
- Click on ► to display the next month.
- Click on the name of the month to display a drop down list with 12 months of the current year.
- Click on the year to display an up arrow ▲ and down arrow ▼. Clicking on the up arrow ▲ displays the same month in the next year. Clicking on the down arrow ▼ displays the same month in the previous year.

d. Select the last date of the term by using one of the methods below:

i. Click on the STOP DATE field and type in the desired date.

ii. Click on STOP DATE ▼ to display a popup calendar and then click on the desired date, which will be inserted in the TO DATE field.

e. Click on the ACTIVE checkbox to specify that the term is currently active.

f. Click on SAVE to store the entries.

g. Repeat steps a. – f. to add other Terms.

h. Click on CLOSE to exit the screen.

6. Click on PROPERTIES to display the IMPORT SPECIFICATIONS screen.

7. Click on SOURCE FILE … and then browse on the LOCATE DATA FILE screen to find the drive and directory of the file containing the classes to be imported.

8. Double-click on the desired file. The name of the file will be displayed in the SOURCE FILE field, and the first 100 records will be made available in the SAMPLE RECORDS field.

Note
Several records are provided in the event that certain data elements are contained within some, but not all of the examples.

9. Click on DATE FORMAT ▼ and select the desired format for dates. If the desired format is not on the list, type it into the field.

10. [Applicable only if student first, middle and last names in the school's database are separate data elements] Click on STUDENT NAME FORMAT ▼ and select the desired layout for student names. The recommended option is: **Last, First Middle**.

11. [If applicable] In the ROWS TO DISREGARD section, click on the text box adjacent to AT BEGINNING OF FILE and type in the number of rows at the beginning of the import file that should not be included in the import.

12. [If applicable] In the ROWS TO DISREGARD section, click on the text box adjacent to AT END OF FILE and type in the number of rows at the end of the import file that should not be included in the import.

13. Click on SAVE to store the selected settings.

    At this point, the data elements for classes must be added and configured in the RECORD LAYOUT sub-section. The available options are:

    Student ID – Student ID*
    Student Name – Full**
    Courses – Subject*
    Courses – Course*
    Courses – Course Description
    Courses – Section*
    Courses – Section Description
    Courses – Section Alt ID
    Courses – Section Start Date
    Courses – Section Stop Date
    Courses – Section Schedule
    Courses – Section Course Type
    Courses – Section Meeting Time
    Courses – Course Credits – Min
    Courses – Course Credits – Max
    Courses – Course Credits – Actual
    Courses – Lab Required
    Courses – Lab Hours
    Instructor – School ID
    Instructor – Name*

    * These five data elements are <u>required</u> in order for courses to be imported.

    ** It is highly recommended that the STUDENT NAME - FULL data element be included. If the system cannot find a match for a student identifier, the import will not include that student's classes. However, if the student's full name is included, the system will build that student record in the database and properly import the classes.

14. Click on ADD. A blank data line will be enabled.

15. Click on DESTINATION ▼ and select the data element to be inserted into the first line of the Record Layout.

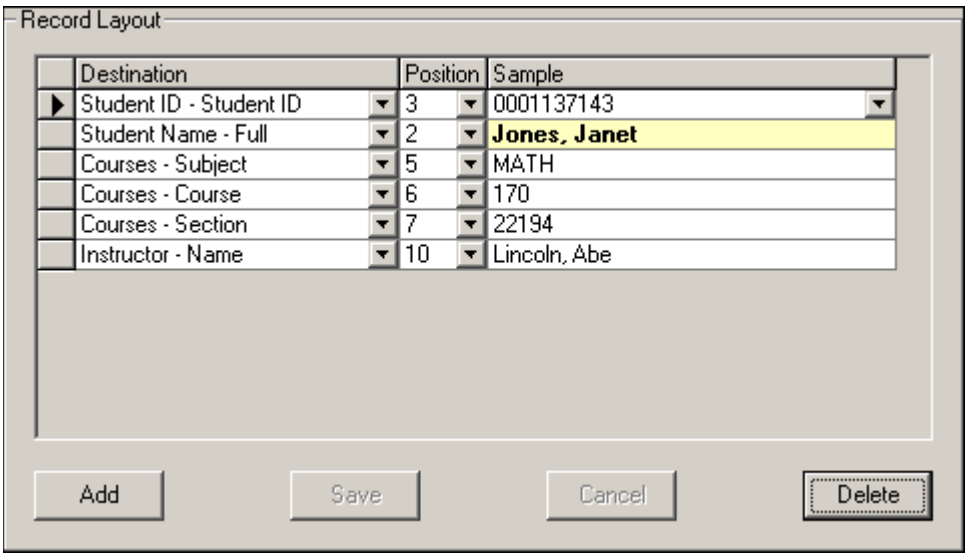
    Note If the selected record does not contain a data element to be configured, click on a different one.

16. With the selected data element inserted into the DESTINATION field, click on POSITION ▼ and select the position number in which that data element is situated.

17. Click on SAVE. An example of the data element will be displayed in the adjacent SAMPLE field.

Note
To modify a data element, see "Modify Data Formats or Values" at Section 42.2 in this Part.

18. Repeats steps 14 – 17 until all required data elements have been selected and configured. Here is a sample of the Record Layout with all of the required and recommended data elements configured:



19. Click on CLOSE to exit the IMPORT SPECIFICATIONS screen and return to the IMPORT FORMATS screen.

20. Click on CLOSE to exit the program.

42.1.4 Filter Records

In some situations, the student data to be imported into SARS·GRID may contain data elements that are unwanted. For example, if the student data includes dropped classes, but only classes in which students are enrolled should be imported, the dropped classes data element may be filtered out when setting up the Import Specifications screen.

1. From the IMPORT SPECIFICATIONS screen, click on one of the records in the SAMPLE RECORDS field that contains the data element to be discarded.

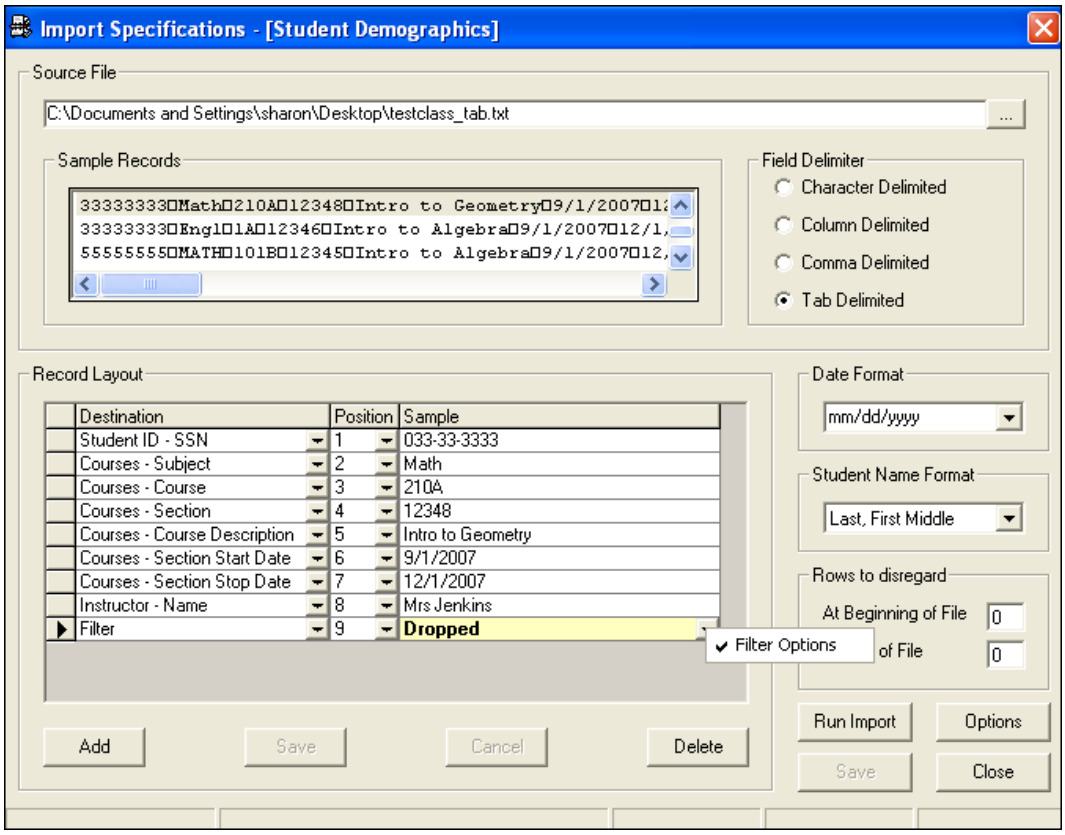
2. In the FIELD DELIMITER section, click on the type of Field Delimiter that corresponds with the records to be imported. A RECORD LAYOUT field will be enabled.

3. Click on ADD. A blank data line will be enabled.

4. Click on DESTINATION ▼ and select the data element entitled "Filter," which is at the end of the list.

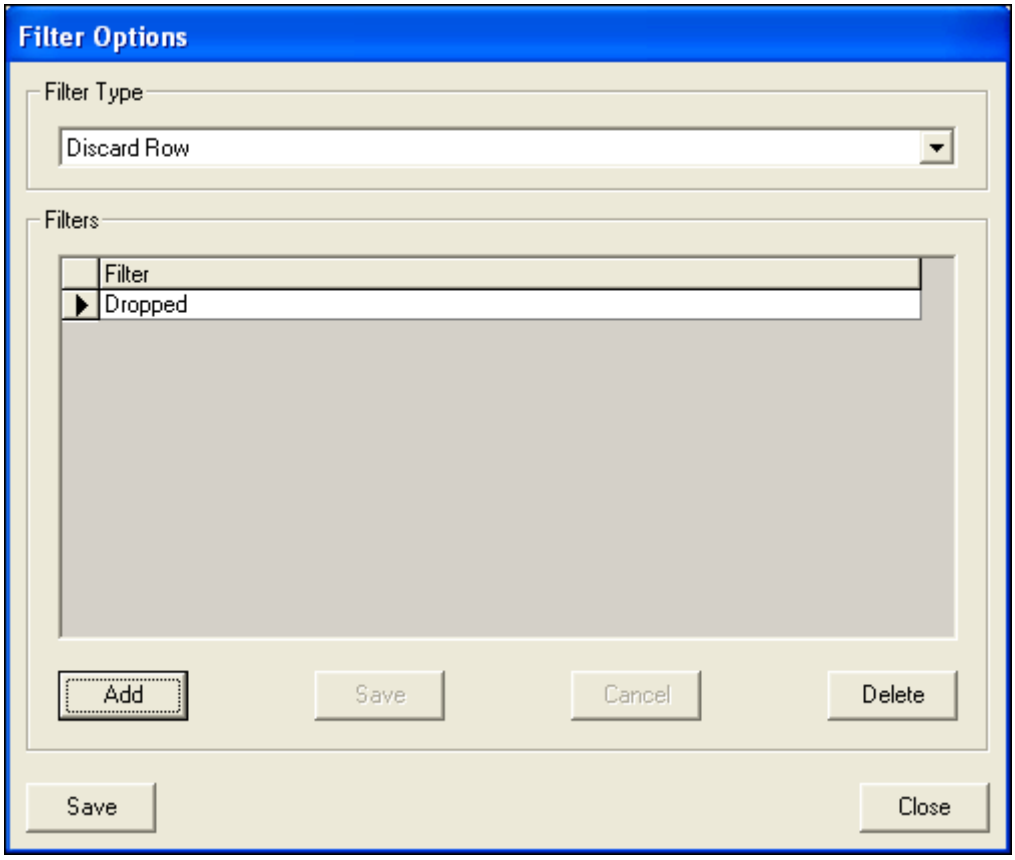
5. Click on POSITION ▼ and type in the position in the data row containing the element to be discarded.

6. Click on the SAMPLE field on the Filter line, and click on ▼ to display a popup menu. Here is an example:



7. Click on the FILTER OPTIONS button to display a FILTER OPTIONS screen.

Here is an example:



The options are:

- FILTER TYPE: Use to select the type of filter to be used. (Currently, DISCARD ROW is the only option.)
- FILTER: Use to type in the name or symbol of the data element to be discarded (e.g., DROPPED).
- ADD: Use to enable a Filter row for data entry.
- SAVE: Use to store the information.
- CANCEL: Use to abort the selection.
- DELETE: Use to delete the filter.
- SAVE: Use to save the FILTER OPTIONS screen.
- CLOSE: Use to exit the screen.

8. The FILTER TYPE field defaults to DISCARD ROW. Keep this option.
9. Click on the blank row under FILTER and type in the value of the filter (e.g., DROPPED).
10. Click on SAVE.

11. Click on CLOSE to exit the screen.

12. Run the import manually or wait for it to be run on its automatic schedule. Any data element containing the filter will be discarded from the import process.

42.2 Modify Data Formats or Values

In some cases, it may be necessary or desirable to alter the format or value of a data element when importing it from the school's database into the SARS database. The options for modifying data elements include the following:

CUSTOM PROCESSING:	[Reserved for customization] (See Section 42.2.1, below.)
FIELD OPTIONS:	Use to specify the manner in which an Additional Information data element should be imported to the SARS database. (See Section 42.2.2, below.)
JOIN PROPERTIES:	Use to merge data elements that are stored in two or more different fields in the school's database into a single field in the SARS database. (See Section 42.2.3, below.)
SUB LAYOUTS:	Use to break out a single data element containing multiple values in a data element into separate data elements in the SARS database. (See Section 42.2.4, below.)
TRANSLATIONS:	Use to convert a format or value in the school's database to a different format or value in the SARS database. (See Section 42.2.5, below.)

Modifications may be made during or after the initial set-up process.

42.2.1 Custom Processing

[reserved]

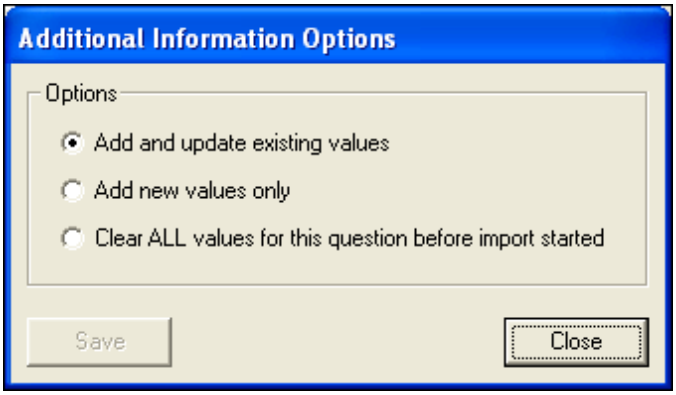
42.2.2 Field Options

The FIELD OPTIONS menu is available if a Destination field contains ADDITIONAL INFORMATION data. This menu will provide access to more choices for selecting or modifying the manner in which those values will be imported to the SARS Database.

1. From the IMPORT SPECIFICATIONS screen, click on SAMPLE ▼ on the line containing the Additional Information data element to be modified.

2. Click on FIELD OPTIONS to display the ADDITIONAL INFORMATION OPTIONS screen.

It looks like this:



The options are:

- ADD AND UPDATE EXISTING VALUES: Use to import all Additional Information values that have been added or updated since the last import. (This is the default option.)
- ADD NEW VALUES ONLY: Use to import only those Additional Information values that have been added to the school's database since the last import.
- CLEAR ALL VALUES FOR THIS QUESTION BEFORE IMPORT STARTED: Use to delete the selected Additional Information values for **all** students before importing.
- SAVE: Use to store the selection.
- CLOSE: Use to close the screen.

3. Click on the desired selection.
4. Click on CLOSE to return to the IMPORT SPECIFICATIONS screen.

Note
The modified data elements will have a yellow field background in the Sample field on the IMPORT SPECIFICATIONS screen. To determine the type of modification, click on SAMPLE ▼. A menu displaying the modification options will be displayed, and the specific modification(s) will be checked ✓.

5. Click on CLOSE to exit the IMPORT SPECIFICATIONS screen and return to the IMPORT FORMATS screen.
6. Click on CLOSE to exit the program.

42.2.3 Join Properties

JOIN PROPERTIES is available regardless of the type of field delimiter being used. The purpose of this feature is to take data elements that may be separate fields in the school's database and place them in a single field in the SARS database. For example, if the school uses 4 status fields to display the last four school terms, JOIN PROPERTIES will enable the user to join those 4 fields into a single data field and, if desired, to designate a character to be used for separating that information.

Note Modifications using translations are typically performed using the TRANSLATIONS feature. However, translations may also be performed while in the JOIN OPTIONS screen. For more information about Translations, see Section 42.2.5 in this Part.

1. From the IMPORT SPECIFICATIONS screen, click on DESTINATION ▼ on the line containing the data element to be modified.

2. Follow step a or step b below, depending on the manner in which the source file is delimited:

   a. [For Character, Comma and Tab Delimited formats] Click on POSITION ▼ and select JOIN, which is at the bottom of the drop down list.

   b. [For Column-Delimited formats] Click on START ▼. A FIELD POSITION screen will be displayed. While holding down the left mouse button, scroll to highlight the section of the line containing the related data field, including any blank space that follows (up to the beginning of the next data field). For example, if the Destination is Student Name, highlight the entire name plus all of the unused space comprising the Student Name data field to the right of the name.

3. Click on SAMPLE ▼ and select JOIN PROPERTIES to display the JOIN OPTIONS screen.

   Note The data element will be displayed in the SAMPLE field. The JOIN LAYOUT field will be similar to the Record Layout format on the IMPORT SPECIFICATIONS screen. It is dependent upon whether characters, columns, commas or tabs delimit the data elements.

4. Click on ADD to enable the first line of the JOIN LAYOUT field.

5. Unless one of the data elements from the sample is **not** being used, leave the VALUE field blank.

6. Select the first data element to be joined into a single data element, as follows:

   a. [For character, comma or tab-delimited records] Click on POSITION ▼ and select the position number of the data element.

   b. [For column-delimited records] Highlight the complete portion of the data element in the Sample field. The START, LENGTH and SAMPLE fields will fill in automatically. (See step 5 of "Set up Column Delimited Records," Section 42.1.2 in this part.)

7. Click on the SAMPLE field to display the selected data element.

8. Click on ADD to enable the next line of the JOIN LAYOUT field.

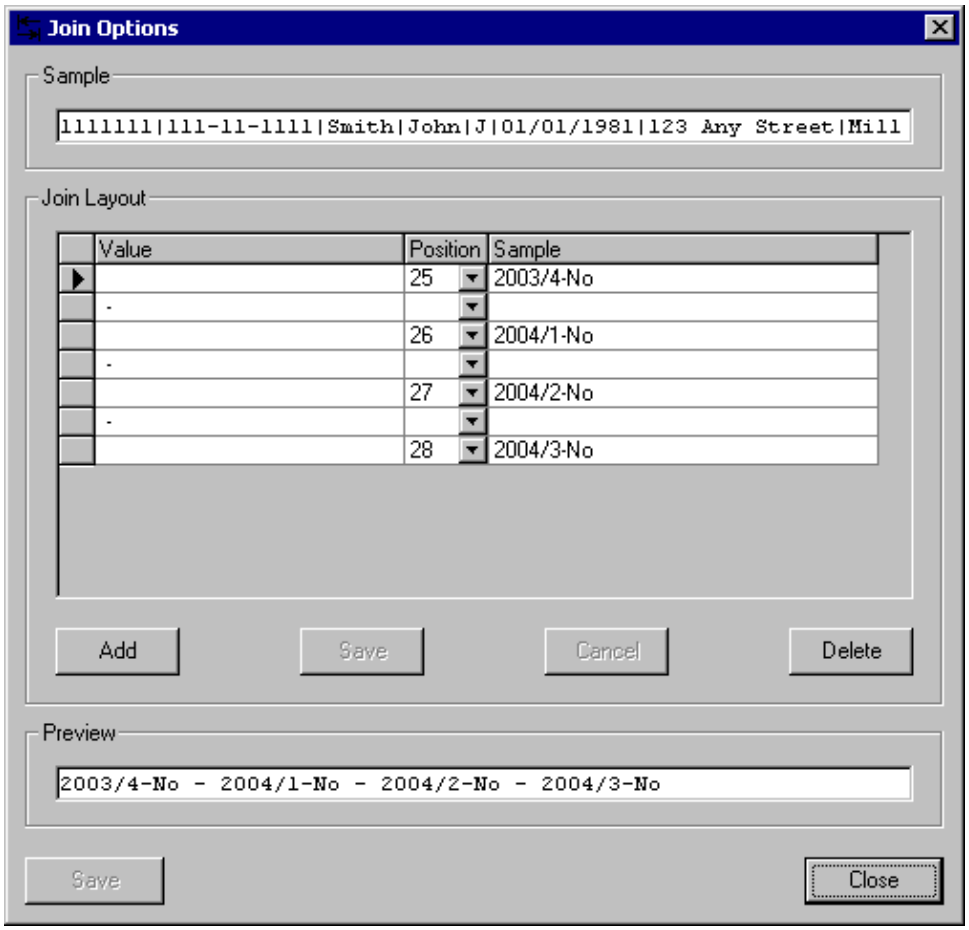
9. Click on the VALUE field and then type a character to be used to separate each data element. In the example below, a hyphen is used as the separator.

10. Repeat steps 4 – 9 until all data elements and their separators have been entered.

11. Click on SAVE.

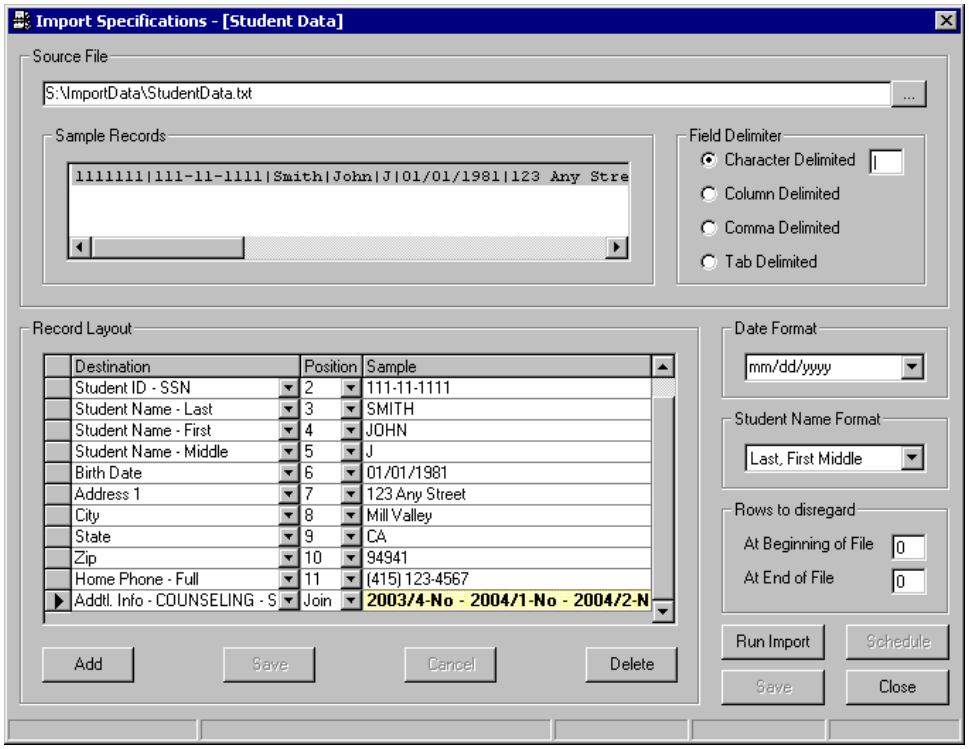
12. Preview the resulting layout in the PREVIEW field near the bottom of the screen.

    Here is an example of the JOIN OPTIONS screen in which four school terms have been joined into one data element.



13. When done, click on CLOSE. You will be returned to the IMPORT SPECIFICATIONS screen.

Here is an example.



Note
The modified data elements will be displayed with a yellow field background in the Sample field on the IMPORT SPECIFICATIONS screen. To determine the type of modification, click on SAMPLE ▼. A menu displaying the modification options will be displayed, and the specific modification(s) will be checked ✓.

14. Click on CLOSE to exit the IMPORT SPECIFICATIONS screen and return to the IMPORT FORMATS screen.

15. Click on CLOSE to exit the program.

42.2.4 Sub Layouts

A RECORD LAYOUT screen is available to modify values for data elements that have **multiple values**. For example, if a school's database contains a single data element comprised of comma-delimited values and column-delimited values, the SUB LAYOUT feature enables the user to separate the data element into two or more data fields in the SARS database.

Note Modifications using translations are typically performed using the TRANSLATIONS feature. However, translations may also be performed in the RECORD LAYOUTS screen using the SUB LAYOUTS feature. For more information about Translations, see Section 42.2.5 in this Part.

1. From the IMPORT SPECIFICATIONS screen, click on SAMPLE ▼ on the line containing the data element **Multiple Values**. A menu with a Sub Layout option will be displayed.

2. Click on SUB LAYOUT. A RECORD LAYOUT screen will be displayed.

3. Note that the data element will be displayed in the SAMPLE field.

4. In FIELD DELIMITER, click on the type of delimiter that separates or aligns the data elements in the source file. If CHARACTER is selected, click on the text box adjacent to the selection type in the specific character to be used.

5. If a date is included in the data element, click on DATE FORMAT ▼ and select the desired format for dates. Otherwise, skip the DATE FORMAT field.

6. Click on ADD to enable the first line of the RECORD LAYOUT field.

Note The Record Layout format will be similar to the Record Layout format on the IMPORT SPECIFICATIONS screen. It is dependent upon whether characters, columns, commas or tabs delimit the data elements.

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   a. Click on DESTINATION ▼ and then select the first part of the data element.

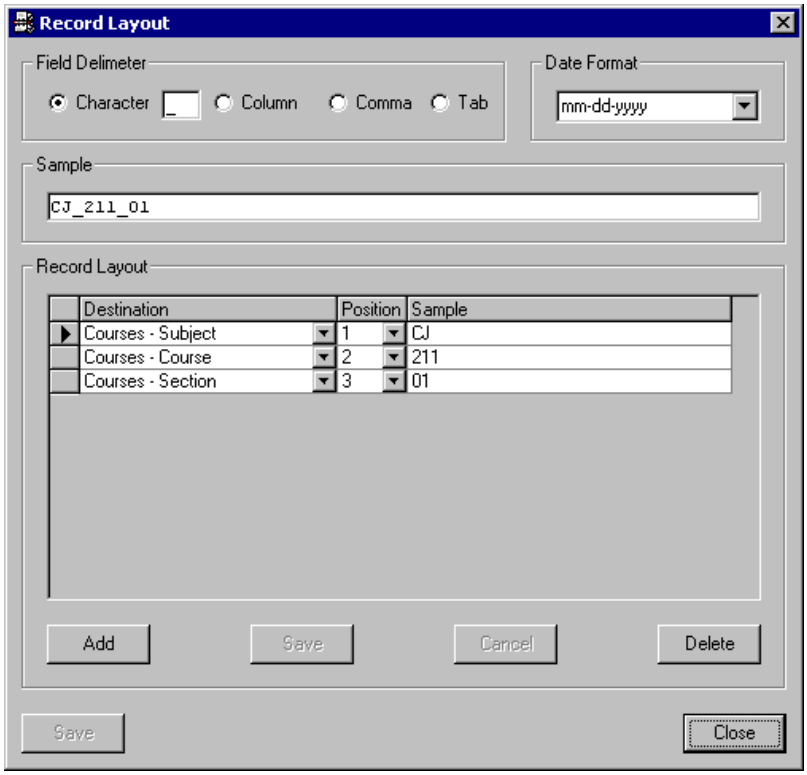
   b. Click on POSITION ▼ and then select the desired position number for the information.

   c. Click on SAMPLE to display an example of the data element.

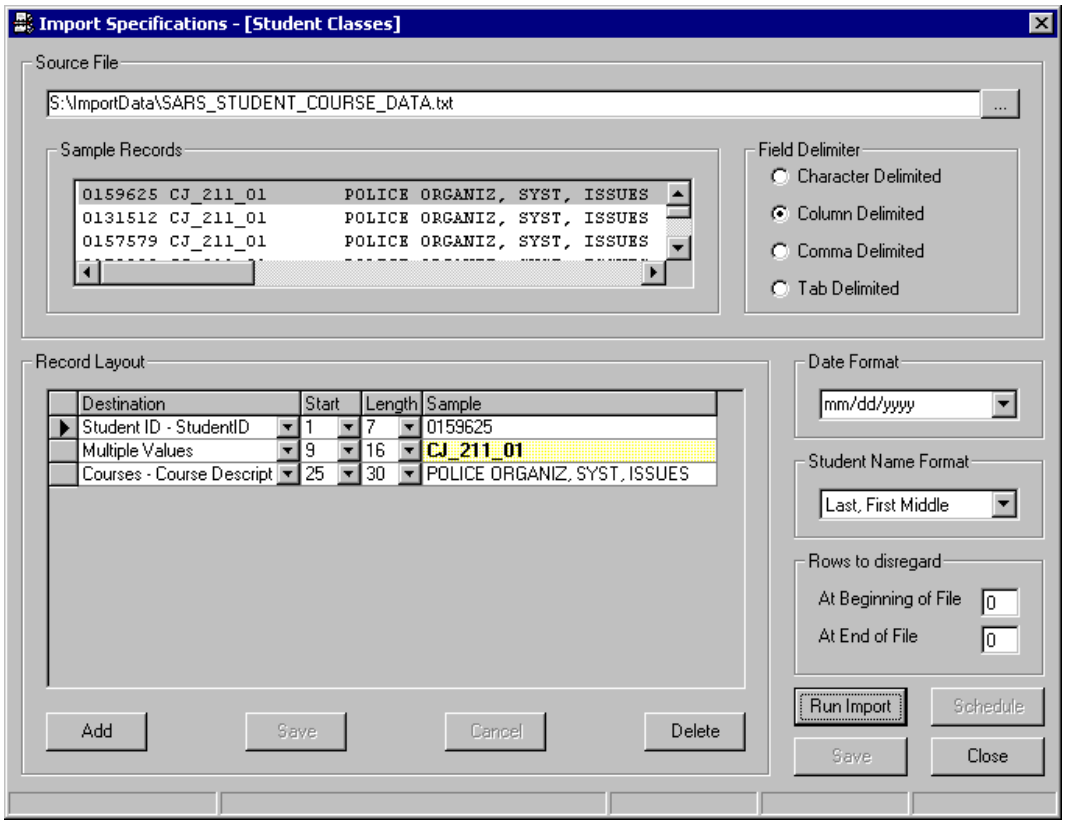
7. Click on ADD to enable the next line of the RECORD LAYOUT field and repeat steps 4a – c for the next part of the data element.

8. Repeat steps 5 - 7 until all parts of the data elements have been entered.

9. Click on SAVE. Here is an example of the RECORD LAYOUT screen in which a data element containing a Course Subject (**CJ**), Course (**211**), and Section (**01**) has been separated into three distinct data elements using the SUB LAYOUT feature.



10. When done, click on CLOSE. You will be returned to the IMPORT SPECIFICATIONS screen. Here is an example.



Note
The modified data elements will be displayed with a yellow field background in the Sample field on the IMPORT SPECIFICATIONS screen. To determine the type of modification, click on SAMPLE ▼. A menu displaying the modification options will be displayed, and the specific modification(s) will be checked ✓.

11. Click on CLOSE to exit the IMPORT SPECIFICATIONS screen and return to the IMPORT FORMATS screen.

12. Click on CLOSE to exit the program.

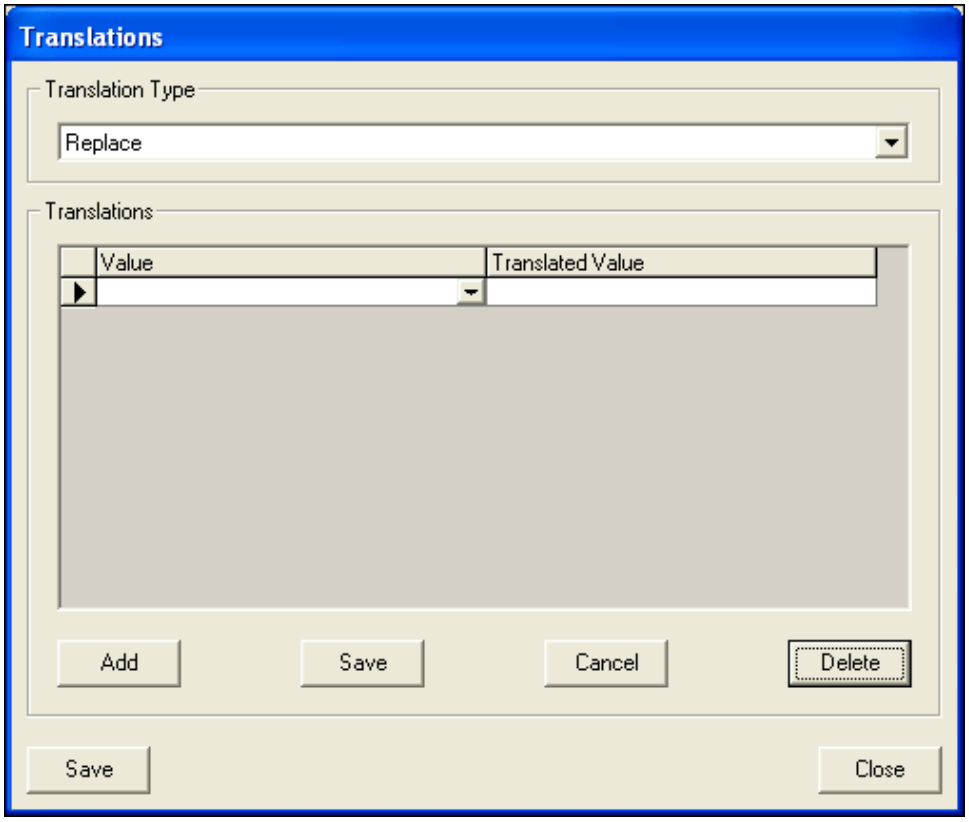
42.2.5 Translations

In some cases, there may be a need to translate a format or value to a different format or value. This may be done for each relevant data element on the RECORD LAYOUT sub-screen.

Note Translations may also be performed using the JOIN PROPERTIES feature and the SUB LAYOUT feature (see Sections 42.2.2 and 42.2.3 in this Part).

1. From the IMPORT SPECIFICATIONS screen, click on the desired SAMPLE field in the RECORD LAYOUT sub-screen; then click on ▼. A TRANSLATIONS screen, or a menu from which the Translations option may be selected, will be displayed.

Here is an example of the TRANSLATIONS screen:



The options are:

- TRANSLATION TYPE: Use to select a method for translating data elements from one form to another.
- TRANSLATIONS: Use to select or enter the data element as it exists and as it should be. (The titles of the fields in this area of the screen vary, depending upon the Translation Type selected. See step 2, below.)
  - ADD: Use to create a line in the RECORD LAYOUT sub-screen to enter a data element.
  - SAVE: Use to store the data lines in the RECORD LAYOUT sub-screen.
  - CANCEL: Use to undo an action that has not yet been saved in the RECORD LAYOUT sub-screen.
  - DELETE: Use to delete the selected data element in the RECORD LAYOUT sub-screen.
- SAVE: Use to store the selections.
- CLOSE: Use to exit the TRANSLATIONS screen.

2. Click on TRANSLATION TYPE ▼ and select the data element to be translated. The options are:

- FORMAT: Use to reformat data elements containing numbers. For example, a 5 + 4 digit zip code may be reformatted to eliminate the 4-digit extension. Only one format translation is allowed.

  FORMAT: Example: **#####-####**

  TRANSLATED FORMAT: Example: **#####**

- REPLACE: Use to substitute one data element with a different one. For example, if a data element is abbreviated as "Y" or "N", you may wish to translate that data element for SARS purposes to display the entire word (e.g., "Yes" and "No").

  VALUE: Example: **Y**.

  Note
  Two other options may be selected in the VALUE field. They are:

  OTHER VALUES: Use to create a value that is not specified on the list of Translations. For example, if a student record contains a value of "P" and the list does not have a translated value for "P," select "Other Values" and assign the translated value as "Unknown."

  BLANK VALUES: Use to display a blank value in situations where a value is not specified.

  TRANSLATED VALUE: Example: **YES**.

- ALPHA CHARACTERS ONLY: Use to specify that if the data element contains both alpha and numeric values, only the alpha characters should be used.

  FILTERED TEXT: [Indicates that all numeric characters will be filtered out so that only alpha characters are displayed.]

- NUMBERS ONLY: Use to specify that if the data element contains both alpha and numeric values, only the numeric characters should be used.

  FILTERED TEXT: [Indicates that all alpha characters will be filtered out so that only numeric characters are displayed.]

- ALPHA CHARACTERS FROM LEFT OF STRING: Use to select all alpha characters starting from the left of the data element. (The system will stop when it reaches a non-alpha character.)

FILTERED TEXT: [Indicates that all alpha characters from the left will be displayed until the text string reaches a numeric character.]

- NUMBER FROM RIGHT OF STRING: Use to select all numeric characters starting from the right of the last non-numeric character, if any.

  FILTERED TEXT: [Indicates that all numeric characters from the right will be displayed until the text string reaches an alpha character.]

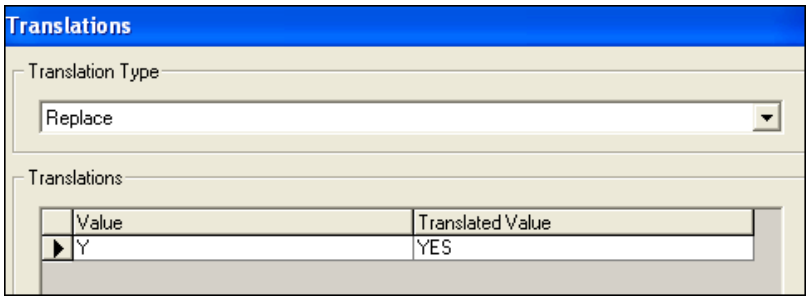
- ALPHA CHARACTERS FROM RIGHT OF STRING: Use to select all alpha characters starting from the right of the last non-alpha character, if any.

  FILTERED TEXT: [Indicates that all alpha characters from the right will be displayed until the text string reaches a numeric character.]

- NUMBERS FROM LEFT OF STRING: Use to select all numeric characters starting from the left of the data element string (The system will stop when it reaches a non-numeric character).

  FILTERED TEXT: [Indicates that all numeric characters from the left will be displayed until the text string reaches an alpha character.]

3. Click on the relevant fields to select or enter the existing Value and the desired Translated Value. Here is an example:

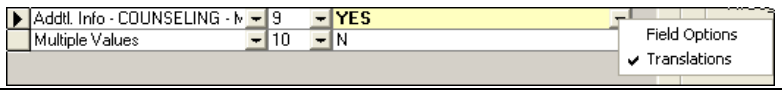


4. When done, click on CLOSE to return to the IMPORT SPECIFICATIONS screen.

5. Click on CLOSE to exit the IMPORT SPECIFICATIONS screen and return to the IMPORT FORMATS screen.

6. Click on CLOSE to exit the program.

Note
The modified data elements will be displayed with a yellow field background in the Sample field on the IMPORT SPECIFICATIONS screen. To determine the type of modification, click on SAMPLE ▼. A menu displaying the modification options will be displayed, and the specific modification(s) will be checked ✓. Here is an example:



42.3 Make Deletions

The following elements may be deleted from the Import Program:

1. An Import Format from the IMPORT FORMATS screen (Section 42.3.1).
2. A Data Element from the IMPORT SPECIFICATIONS screen (Section 42.3.2).
3. A Data Element from the JOIN OPTIONS screen (Section 42.3.3).
4. A Data Element from the RECORD LAYOUT screen (Section 42.3.4).
5. A Data Element from the TRANSLATIONS screen (Section 42.3.5).

42.3.1 Delete an Import Format from the Import Formats Screen

To delete a specific Import Format from the IMPORT FORMAT screen, follow the steps below:

1. Click on the IMPORT button on the SARS·MENU.
2. On the IMPORT FORMATS screen, click on the Import Format (description) to be deleted. The DELETE button will be activated.
3. Click on DELETE. A confirmation message will be displayed.
4. Click on YES to confirm the action. The Import Format will be deleted.
5. Click on CLOSE to exit the screen.

42.3.2 Delete a Data Element from the Import Specifications Screen

Warning Exercise caution when deleting data elements for CLASS imports. At least five (and preferably six) data elements are required and should not be deleted. They are: STUDENT ID, CLASSES - SUBJECT, CLASSES - COURSE, CLASSES - SECTION, and INSTRUCTOR NAME. It is also recommended that STUDENT NAME - FULL be retained.

To delete a data element that has been added and saved to the RECORD LAYOUT sub-screen, follow the steps below.

1. Click on the IMPORT button on the SARS·MENU.
2. On the IMPORT FORMATS screen, click on the Import Format (description) containing the data element to be deleted.
3. Click on PROPERTIES to display the IMPORT SPECIFICATIONS screen.
4. Click on the line to be deleted from the RECORD LAYOUT sub-screen.
5. Click on DELETE. A confirmation message will be displayed.
6. Click on YES to confirm the action. The line will be deleted from the Record Layout.
7. Click on CLOSE.

42.3.3 Delete a Data Element from the Join Options Screen

Warning Exercise caution when deleting data elements for CLASS imports. At least five (and preferably six) data elements are required and should not be deleted. They are: STUDENT ID, CLASSES - SUBJECT, CLASSES - COURSE, CLASSES - SECTION, and INSTRUCTOR NAME. It is also recommended that STUDENT NAME - FULL be retained.

To delete a data element that has been added and saved to the JOIN OPTIONS screen, follow the steps below.

1. Click on the IMPORT button on the SARS MENU.
2. On the IMPORT FORMATS screen, click on the Import Format (description) containing the data element to be deleted.
3. Click on PROPERTIES to display the IMPORT SPECIFICATIONS screen.
4. Click on SAMPLE ▼ and select JOIN PROPERTIES to display the JOIN OPTIONS screen.
5. Click on the line to be deleted.
6. Click on DELETE. A confirmation message will be displayed.
7. Click on YES to confirm the action. The line will be deleted.
8. Click on CLOSE to return to the IMPORT SPECIFICATIONS screen.
9. Click on CLOSE.

42.3.4 Delete a Data Element from the Sub Layout Record Layout Screen

Warning Exercise caution when deleting data elements for CLASS imports. At least five (and preferably six) data elements are required and should not be deleted. They are: STUDENT ID, CLASSES - SUBJECT, CLASSES - COURSE, CLASSES - SECTION, and INSTRUCTOR NAME. It is also recommended that STUDENT NAME - FULL be retained.

To delete a data element that has been added and saved to the SUB LAYOUT RECORD LAYOUT screen, follow the steps below.

1. Click on the IMPORT button on the SARS MENU.
2. On the IMPORT FORMATS screen, click on the Import Format (description) containing the data element to be deleted.
3. Click on PROPERTIES to display the IMPORT SPECIFICATIONS screen.
4. Click on the desired Sample field on the Data Record line.
5. Click on SAMPLE ▼ and select SUB LAYOUTS to display the RECORD LAYOUT screen.
6. Click on the line to be deleted.
7. Click on DELETE. A confirmation message will be displayed.

8. Click on YES to confirm the action. The line will be deleted.

9. Click on CLOSE to return to the IMPORT SPECIFICATIONS screen.

10. Click on CLOSE.

42.3.5 Delete a Data Element from the Translations Screen

Warning Exercise caution when deleting data elements for CLASS imports. At least five (and preferably six) data elements are required and should not be deleted. They are: STUDENT ID, CLASSES - SUBJECT, CLASSES - COURSE, CLASSES - SECTION, and INSTRUCTOR NAME. It is also recommended that STUDENT NAME - FULL be retained.

To delete a translation value that has been added and saved to the TRANSLATIONS screen, follow the steps below.

1. Click on the IMPORT button on the SARS MENU.

2. On the IMPORT FORMATS screen, click on the Import Format (description) containing the data element translation to be deleted.

3. Click on PROPERTIES to display the IMPORT SPECIFICATIONS screen.

4. Click on the desired Sample field on the Data Record line.

5. Click on SAMPLE ▼. The TRANSLATIONS screen will be activated.

   Note
   If more than one modification has been made for the data record, a Modification Options screen will be displayed. Click on TRANSLATIONS to display the Translations screen.

6. Click on the line to be deleted.

7. Click on DELETE. A confirmation message will be displayed.

8. Click on YES to confirm the action. The line will be deleted.

9. Click on CLOSE to return to the IMPORT SPECIFICATIONS screen.

10. Click on CLOSE.

42.4 Import Records to SARS·GRID

When all of the data elements have been selected and, if necessary, modified, the import process may be initiated. Imports may be started manually or they may be scheduled for processing at a pre-established time using the Windows Task Scheduler.

42.4.1 Import Records Manually

A manual import will start the import process immediately.

1. Click on the IMPORT button on the SARS MENU.
2. Click on the data file to be imported.
3. With the desired import specification highlighted, click on PROPERTIES to display the IMPORT SPECIFICATIONS screen.
4. Click on RUN IMPORT. The import process will start. When it is finished, the following screen will be displayed:

5. Click on OK.

42.4.2 Schedule an Import Process Using the Auto Import Utility

You may schedule the import process by using the Windows Task Scheduler. Only those import formats that have been checked as ENABLED on the IMPORT FORMATS screen will be imported using the Auto Import Utility.

SECTION 43 – EXPORT SARS DATA TO A HOST SYSTEM

43.0 Overview

This Section provides guidance on exporting SARS data to a school's software system using SARS·Exchange, which is a separate program that is available to users who have been assigned MISCELLANEOUS – EXCHANGE access rights. For those users, the SARS·MENU will look like this:

Computer support staff may use SARS·EXCHANGE to extract standardized flat files from the SARS Database to the school's host system for reporting purposes (for example, reports required by the state). Step 1 of the process uses SARS·GRID to initiate an export of data to the school's system. This Section covers guidance on Step 1 – exporting data from the SARS Database to the school's software system.

The information that is extracted from the Student History File of the SARS Database includes: the date of service, the student's ID, and the reason(s) for the service. In cases where more than one reason is associated with an appointment, the export process can create a separate record for each Reason Code.

Note
Contact SARS Software Products, Inc. for initial configuration of SARS·IMPORT and SARS·EXPORT

This list that follows is a table of contents for Section 43.

43.1 The SARS·EXCHANGE Toolbar

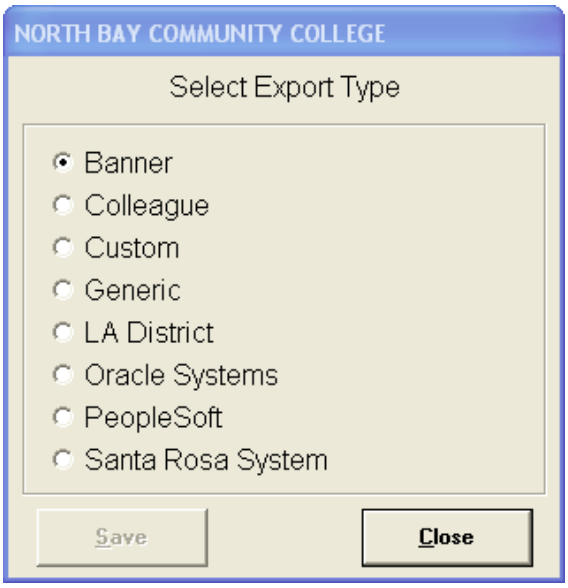
Clicking on the EXCHANGE button on the SARS·MENU will display the following toolbar:

The following buttons appear on the tool bar from left to right:

- EXPORT STUDENT HISTORY: Use to export SARS data to the school's software system (e.g., Banner, Colleague, Santa Rosa system, PeopleSoft, Oracle, custom or generic).
- IMPORT STUDENT DATA: Use to import data from the school's software system to the SARS database.
- EXIT: Use to exit the SARS·EXCHANGE program.

43.2 The Select Export Type Screen

From the SARS·EXCHANGE toolbar, clicking on Export Student History will display the following selection screen:



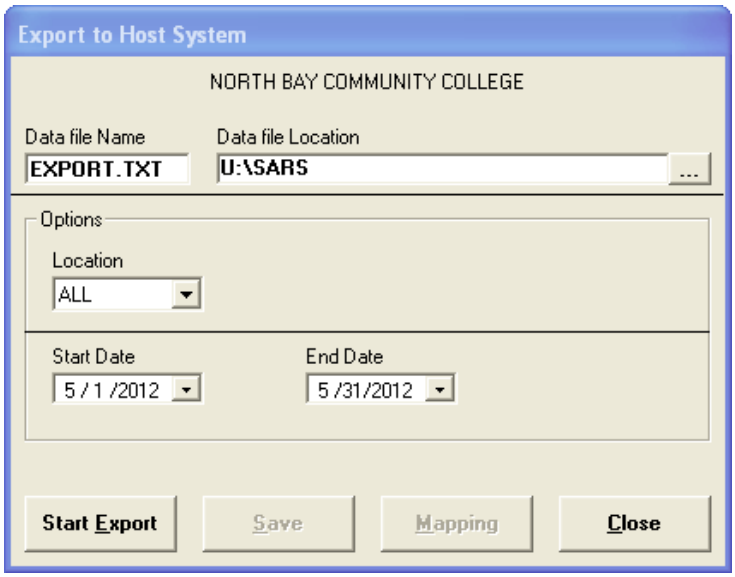
The Export Type to be selected is based on the host system being used at the college. Once a selection is made and saved, this Export Type screen will not need to be used again, unless the college changes its host system.

43.3 Export to Banner, Oracle or PeopleSoft Systems

[Applicable only to schools that are using Banner, Oracle or PeopleSoft.]

43.3.1 Set Up the Export Screen

1. Click on the EXCHANGE button on the SARS·MENU.
2. Click on EXPORT STUDENT HISTORY; then click on SELECT EXPORT TYPE.
3. Click on BANNER, ORACLE or PEOPLESOFT, depending on the host system used at the college.
4. Click on SAVE. You will be returned to the toolbar.
5. Click on EXPORT STUDENT HISTORY again to display the export screen.
   Here is an example when ALL is selection for Location:



The options are:

- DATA FILE NAME: Use to specify the name of the data file.
- DATA FILE LOCATION: Use to specify the drive and path of the data file.
- OPTIONS: Use to establish the parameters for the data export for each selected location as follows:

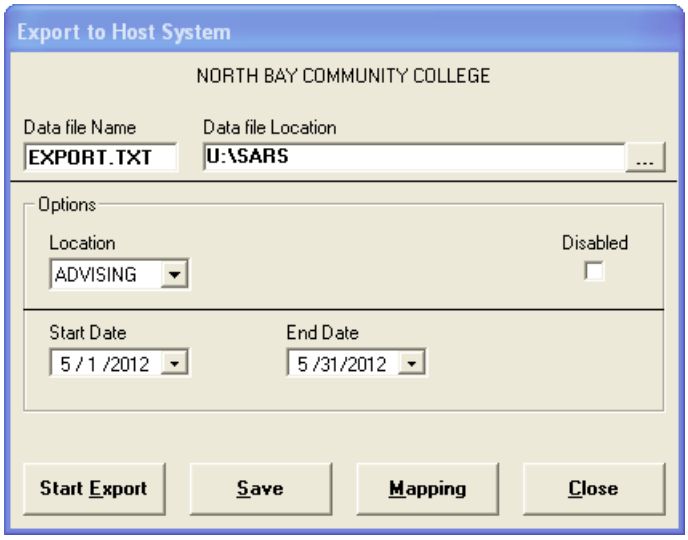
  LOCATION: Use to specify the location for which the export parameters will be established.

  START DATE: Use to select the first date of a date range for which data will be exported.

  END DATE: Use to select the last date of a date range for which data will be exported.

- START EXPORT: Use to initiate the export process.
- SAVE: Use to save the settings on the Export screen.
- CLOSE: Use to exit the screen.

Here is an example of the screen when a specific Location is selected:



The additional options are:

- DISABLED: [Enabled when a Location other than ALL is selected.] Use to indicate that the selected location should be excluded when exporting data to the Host System.
- MAPPING: Use to gain access to the EXPORT MAPPING sub-screen to assign values to existing SARS Reason Codes that correspond with Reason Codes required by the Host System and to specify whether irrelevant Reason Codes should be disregarded when exporting SARS data to the Host System.

6. In the DATA FILE NAME field, enter the name of the file.
7. In the DATA FILE LOCATION field, browse to select the location of the Data file.
8. Click on LOCATION ▼ and select the desired Location, or select ALL to include all Locations that are not disabled.
9. [If a Location other than ALL is selected] Click on MAPPING to set up Reason Codes on the EXPORT MAPPING screen (see Section 43.3.2, below).
10. Click on SAVE.
11. Repeat steps 8-10 for each and every Location.
12. When done, proceed to Section 43.3.3 to begin the extract process.

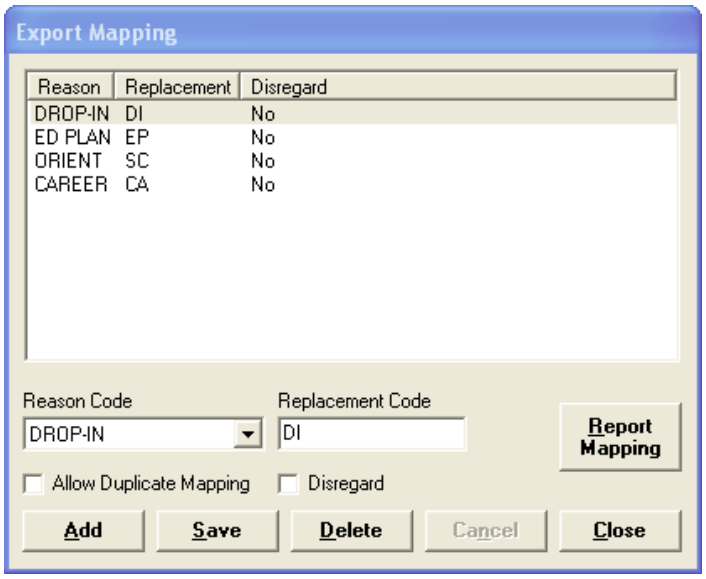
43.3.2 Add Reason Codes Using the Export Mapping Screen

[applicable only if a Location is selected; disregard if Location = ALL]

The EXPORT MAPPING screen serves two purposes:

- To assign values to existing SARS Reason Codes that correspond with Reason Codes required by the host system.
- To specify whether irrelevant Reason Codes should be disregarded when exporting SARS data to the host system.

Here is an example of the screen:



The options are:

- REASON CODE: Use to select a Reason Code for which Replacement, and/or Disregard values are to be assigned.
- REPLACEMENT CODE: Use to enter the code that is to be used by the host system to represent the selected Reason Code. For example, type in the letters EP if EP will represent the SARS Reason Code "Ed Plan."
- ALLOW DUPLICATE MAPPING: Use to permit entry of multiple mappings for the same reason code.
- DISREGARD: Use to indicate that the selected Reason Code is irrelevant and should not be included in data exported to the host system.
- REPORT MAPPING: Use to generate a list of mappings for preview or printing.
- ADD: Use to make the fields available for entering a new Reason Code on the list.

- SAVE: Use to save the entries made on the screen.
- DELETE: Use to remove an entry from the list.
- CANCEL: Use to cancel actions taken on the screen.
- CLOSE: Use to exit the screen.

1. After selecting the Data File Name, Data File Location and Location on the Export screen, click on MAPPING to display the EXPORT MAPPING screen.
2. To add a Reason Code and assign characteristics to it:
   a. Click on ADD. The DISREGARD field will be enabled.
   b. Click on REASON CODE ▼ and select the desired REASON CODE to be added to the list.

   Note
   If the desired Reason Code is not displayed, one must be created by returning to SARS·UTIL, LOCATION MAINTENANCE, and adding a Reason Code in the Reason Codes screen. (See Part I, Section 4.10.1, "Add a New Reason Code.")

   c. If applicable, click on REPLACEMENT CODE and type in the host system-compatible code that represents the Reason Code.
   d. If the Reason Code should <u>not</u> be used for export purposes, click on DISREGARD. Otherwise, leave this checkbox blank.
   e. If desired, click on ALLOW DUPLICATE MAPPING to permit the entry of multiple mappings for the same reason code.
   f. Click on SAVE.
   g. Repeat step 2 to add other Reason Codes and assign the host system characteristics to them.
3. To change information associated with a Reason Code:
   a. Click on the Reason Code to be changed. The existing characteristics will be displayed in the associated fields.
   b. Make changes, as appropriate.
   c. Click on SAVE.
   d. Repeat step 3 as needed to change the characteristics of other Reason Codes.
4. To delete a Reason Code and its assigned characteristics:
   a. Click on the Reason Code to be deleted. The existing characteristics will be displayed in the associated fields.
   b. Click on DELETE. A confirmation message will be displayed.

c. Click on YES. The Reason Code will be deleted from the list, but it will still be available from the Reason Code menu for later use, if desired.

d. Repeat step 4 as needed to delete other Reason Codes.

5. Click on CLOSE.

6. To view or print a mapping report, click on Report Mapping and follow the instructions on the criteria screen.

Note
If a Reason Code is not listed on EXPORT MAPPING screen, it will be transferred to a flat file as is, without being mapped to a different value.

43.3.3 Export SARS Data to the Host System

Once you have established the Data File Name and Data File Location as well as the Mapping options (if applicable), you will be ready to run an extract.

Note
Before running the Export process, you may wish to change some Reason Codes by selecting each Reason Code to be changed on the EXPORT MAPPING screen, making any changes, and clicking on SAVE.

1. Click on EXPORT STUDENT HISTORY on the SARS·EXCHANGE toolbar; then click on EXPORT HISTORY to display the export screen.

2. The DATA FILE NAME field should already be completed. If not, enter the name of the file.

3. The DATA FILE LOCATION field should already be completed. If not, browse to select the location of the Data file.

4. Complete the following steps FOR EACH LOCATION for which data is to be exported:

   a. Click on LOCATION ▼ and select the desired Location. If information for this Location has already been set up and saved, the information will be displayed in the adjacent fields.

   b. [If a single Location is selected] Click on DISABLED only if the selected Location should not be included in the export process.

   c. Click on the START DATE field and type in the earliest date for which information will be extracted, or click on ▼ to use the Date Picker. (See “Date Picker” in Appendix B.)

   d. Click on the END DATE field and type in the latest date for which information will be extracted, or click on ▼ to use the Date Picker.

   e. Click on SAVE to save the selected settings for future use.

5. Click on START EXPORT.

Note
In cases where more than one reason is associated with an appointment, the export process creates a separate record for each Reason Code.

6. When done, message will be displayed stating that all records were processed.
7. Click on OK.
8. Click on CLOSE.

Here is an example of the Output File Format:

Field Name	Starting Position	Field Size	Notes
Student ID	1	20	
Student Name	21	50	
Date of Service	71	6	Format mmddyy
Reason	77	30	Via the Host mapping
Start Time	107	8	Format hh:mm AMPM
Stop Time	115	8	Format hh:mm AMPM
Location Code	123	10	From SARS Database

43.4 Export to Colleague

[Applicable only to schools that are using Colleague Systems.]

43.4.1 Set Up the Colleague Export Screen

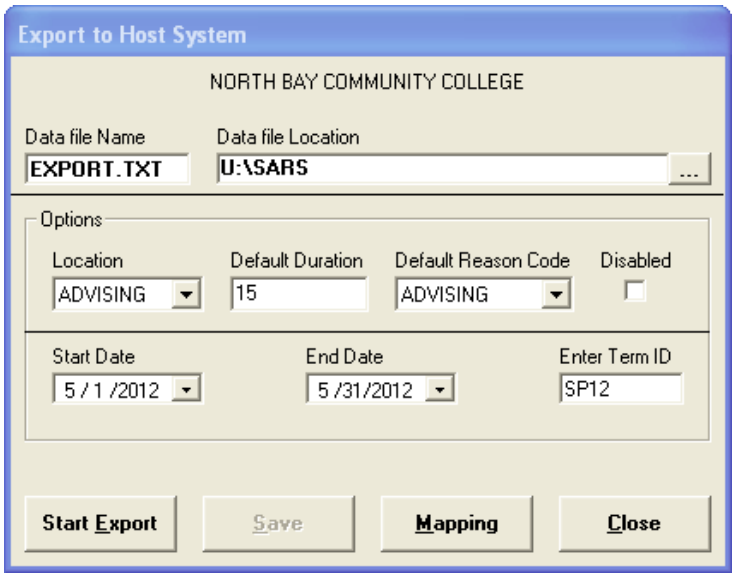
1. Click on the EXCHANGE button on the SARS·MENU.
2. Click on EXPORT STUDENT HISTORY to display the SELECT EXPORT TYPE screen.
3. Click on COLLEAGUE.
4. Click on SAVE. You will be returned to the toolbar.
5. Click on EXPORT STUDENT HISTORY again; then click on EXPORT HISTORY. The following screen will be displayed:

6. Click on USE DATE RANGE to transfer information for a specified date range.

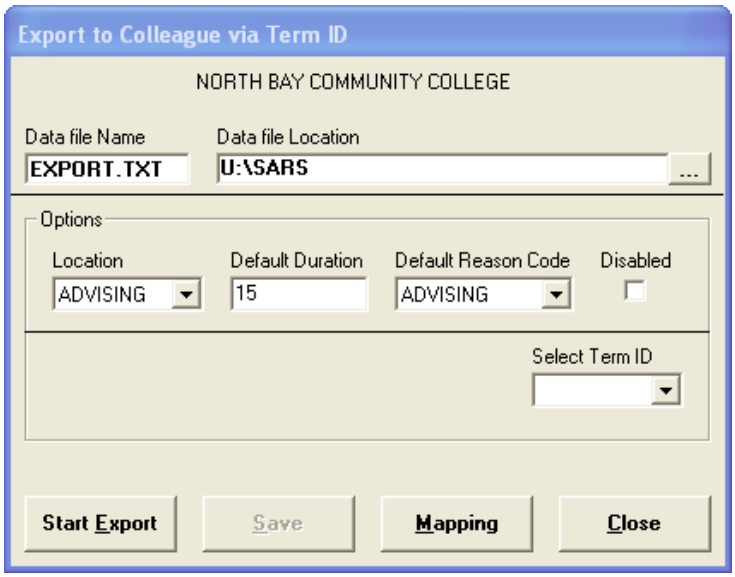
   -or-

   Click on USE TERM IDS to transfer information for a specified term. Depending on the selection, the appropriate export screen will be displayed.

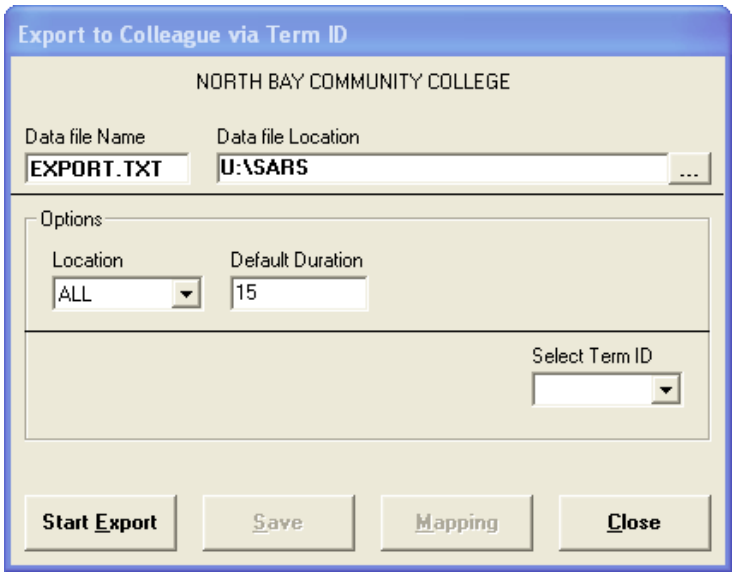
   Here is an example of the Use Date Range export screen when a specific Location is selected:



Here is an example of the Use Term IDs export screen for a selected Location.



Here is an example of the Use Term IDs export screen when ALL Locations are selected:



The options are:

- DATA FILE NAME: Use to specify the name of the data file.
- DATA FILE LOCATION: Use to specify the drive and path of the data file.
- OPTIONS: Use to establish the parameters for the data export for each selected location as follows:

  LOCATION: Use to specify the location for which the export parameters will be established.

DEFAULT DURATION: Use to select the length of any appointment that does not have a stop time (as in the case of drop-in visits). The default duration will calculate the stop time based on the start time of any appointment that does not show a stop time.

DEFAULT REASON CODE: [Enabled when a Location other than ALL is selected.] Use to select a Reason Code to be used for any appointment that does not have an associated Reason Code.

DISABLED: [Enabled when a Location other than ALL is selected.] Use to indicate that the selected location should be excluded when exporting data to the host system.

START DATE: [Available when selecting USE DATE RANGE option.] Use to select the first date of a date range for which data will be exported.

END DATE: [Available when selecting USE DATE RANGE option.] Use to select the last date of a date range for which data will be exported.

ENTER TERM ID: [Available when selecting USE DATE RANGE option.] Use to type in a name for the term encompassed by the date range.

SELECT TERM ID [Available when selecting USE TERM ID option.] Use to select the specific term for which information will be exported. TERM ID refers to reason codes that have been created to encompass a specified school term. The export process will select all records that contain appointments that contain either the Term ID as a reason code or that have an attended appointment date that falls within the selected Term ID's date range.

- START EXPORT: Use to initiate the export process.
- SAVE: Use to save the settings on the screen.
- MAPPING: Use to gain access to the EXPORT MAPPING sub-screen to assign values to existing SARS Reason Codes that correspond with Reason Codes required by the host system, to specify whether certain Reason Codes are to be used as Term IDs, and to specify whether irrelevant Reason Codes should be disregarded when exporting SARS data to the host system. Also use to gain access to the Master List of Term IDs sub-screen to assign date ranges to Term IDs.
- CLOSE: Use to exit the screen.

7. In the DATA FILE NAME field, enter the name of the file.
8. In the DATA FILE LOCATION field, browse to select the location of the Data file.

9. Click on LOCATION ▼ and select the desired Location.

   a. Click on MAPPING to set up Reason Codes on the EXPORT MAPPING screen (see Section 43.4.2, below).

   b. If using Term IDs, from the EXPORT MAPPING screen click on TERM ID MAINT to create date ranges for each term (see Section 43.4.3, below).

10. Repeat step 9 for each and every Location.

11. Click on SAVE.

12. When done, proceed to Section 43.4.4 to begin the extract process.

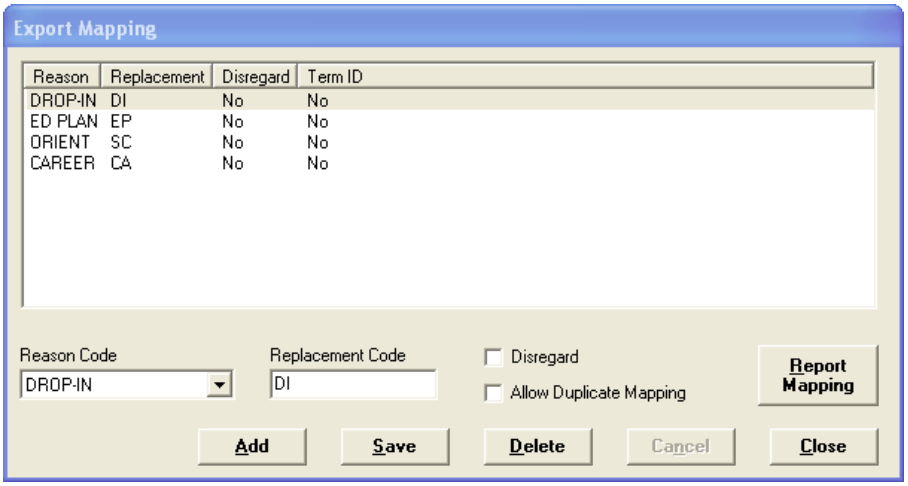
43.4.2 Set up Reason Codes Using the Mapping Screen

[applicable only if a Location is selected; disregard if Location = ALL]

The EXPORT MAPPING screen serves three purposes:

- To assign values to existing SARS Reason Codes that correspond with Reason Codes required by the host system (e.g., see EP, below).
- To specify whether certain Reason Codes are to be used as Term ID's.
- To specify whether irrelevant Reason Codes should be disregarded when exporting SARS data to the host system.

Here is an example of the screen when USE DATE RANGE is selected:



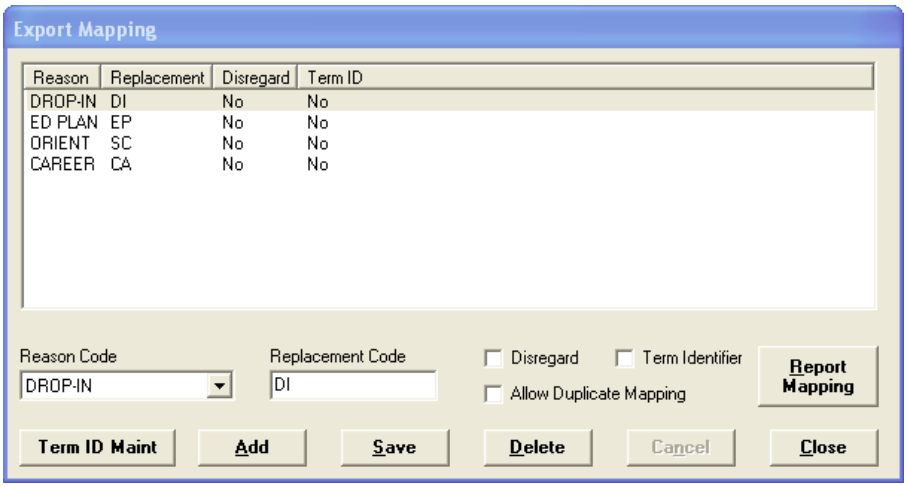
The options are:

- REASON CODE: Use to select a Reason Code for which replacement, disregard, and/or term identifier values are to be assigned.
- REPLACEMENT CODE: Use to enter the code that is to be used by Colleague to represent the selected Reason Code. For example, type

in the letters EP if EP will represent the SARS Reason Code "Ed Plan."

- DISREGARD: Use to indicate that the selected Reason Code is irrelevant and should not be included in data exported to the host system.
- ALLOW DUPLICATE MAPPING: Use to permit entry of multiple mappings for the same reason code.
- REPORT MAPPING: Use to generate a list of mappings for preview or printing.
- ADD: Use to make the fields available for entering a new Reason Code on the list.
- SAVE: Use to save the entries made on the screen.
- DELETE: Use to remove an entry from the list.
- CANCEL: Use to cancel actions taken on the screen.
- CLOSE: Use to exit the screen.

Here is an example of the screen when USE TERM IDS is selected:



The additional options in this mode are:

- TERM IDENTIFIER: [Available only when using Term IDs.] Use to indicate whether the selected Reason Code is a code that represents a school term (YES) or not (NO).
- TERM ID MAINT: [Available only when using Term IDs.] Use to gain access to the MASTER LIST OF TERM IDS screen when exporting files using Term IDs. (See Section 43.4.3 in this Part.)

1. From the SARS·EXCHANGE toolbar, click on EXPORT STUDENT HISTORY; then click on EXPORT HISTORY.

2. Click on USE TERM IDS to display the EXPORT TO COLLEAGUE VIA TERM IDS screen.

3. In the DATA FILE NAME field, enter the name of the file.

4. In the DATA FILE LOCATION field, browse to select the location of the Data file.

5. Click on LOCATION ▼ and select the Location to which the Mapping screen properties will be applied. This action will activate the MAPPING button.

6. Click on MAPPING to display the EXPORT MAPPING screen.

7. To add a Reason Code and assign characteristics to it:

   a. Click on ADD. The DISREGARD and TERM IDENTIFIER options will be enabled.

   b. Click on REASON CODE ▼ and select the desired REASON CODE to be added to the list.

   Note
   If the desired Reason Code is not displayed, one must be created by returning to SARS·UTIL, LOCATION MAINTENANCE, and adding a Reason Code in the Reason Codes screen. (See Part I, Section 4.10.1, "Add a New Reason Code.")

   c. If applicable, click on REPLACEMENT CODE and type in the Colleague-compatible code that represents the Reason Code.

   d. If the Reason Code should <u>not</u> be used for Colleague export purposes, click on DISREGARD. Otherwise, leave this checkbox blank.

   e. If the Reason Code represents a Term (TERM ID), click on the TERM IDENTIFIER checkbox. Otherwise, leave the checkbox blank.

   f. If desired, click on ALLOW DUPLICATE MAPPING to permit the entry of multiple mappings for the same reason code.

   g. Click on SAVE.

   h. Repeat step 7 to add other Reason Codes and assign Colleague characteristics to them.

8. To change information associated with a Reason Code:

   a. Click on the Reason Code to be changed. The existing characteristics will be displayed in the associated fields.

   b. Make changes, as appropriate.

   c. Click on SAVE.

   d. Repeat step 8 as needed to change the characteristics of other Reason Codes.

9. To delete a Reason Code and it's assigned characteristics:

a. Click on the Reason Code to be deleted. The existing characteristics will be displayed in the associated fields.

b. Click on DELETE. A confirmation message will be displayed.

c. Click on YES. The Reason Code will be deleted from the list, but it will still be available from the Reason Code menu for later use, if desired.

d. Repeat step 9 as needed to delete other Reason Codes.

10. To view or print a mapping report, click on Report Mapping and follow the instructions on the criteria screen.

11. Click on CLOSE.

12. If exporting using TERM IDS, proceed to Section 43.4.3 to establish Term ID settings. Otherwise, go directly to Section 43.4.4.

Note
If a Reason Code is not listed on EXPORT MAPPING screen, it will be transferred to a flat file as is, without being mapped to a different value.

43.4.3 Use the Master List of Term IDs

[Applicable only when exporting data using the EXPORT TO COLLEAGUE VIA TERM IDS screen.]

The MASTER LIST OF TERM IDS screen is used to create a date range for a term. It displays only those Reason Codes designated as Term ID codes (codes marked YES) on the EXPORT MAPPING screen (see "Adding Reason Codes Using the Export Mapping Screen" in Section 43.4.2 of this Part). All Reason Codes that are designated as Term IDs will be displayed on the list. The list is used to create a date range for a term.

1. From the SARS·EXCHANGE toolbar, click on EXPORT STUDENT HISTORY.

2. Click on USE TERM IDS to display the EXPORT TO COLLEAGUE VIA TERM IDS screen.

3. The DATA FILE NAME field should already be completed. If not, enter the name of the file.

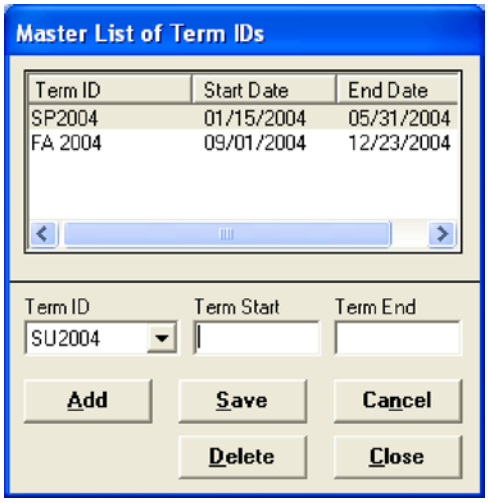
4. The DATA FILE LOCATION field should already be completed. If not, browse to select the location of the Data file.

5. Click on LOCATION ▼ and select the Location to which the Master List of Term IDs will be applied. The MAPPING button will be enabled for use.

6. Click on MAPPING to display the EXPORT MAPPING screen.

7. Click on TERM ID MAINT to display the MASTER LIST OF TERM IDS.

Here is an example of the screen:



The options are:

- TERM ID: Use to select the Term ID to be used for the export process. For example, "SU09."
- TERM START: Use to enter the first date of the term.
- TERM END: Use to enter the last date of the term.
- ADD: Use to enable the fields for entering a new Term ID.
- SAVE: Use to save the entries made on the screen.
- CANCEL: Use to cancel actions taken on the screen.
- DELETE: Use to remove an entry from the list.
- CLOSE: Use to exit the screen.

8. To add a date range for a Term ID,
   a. Click on ADD.
   b. Click on TERM ID ▼ and select the Term ID for which a data range is to be added.
   c. Click on TERM START and enter the first date of the term.
   d. Click on TERM END and enter the last day of the term.
   e. Click on SAVE. The new information will be displayed on the Master List.
9. To change the date range a Term ID,
   a. Click on the desired Term ID to display the information in the boxes below.
   b. Enter the desired changes.

c. Click on SAVE.

10. To delete a Term ID from the list,

    a. Click on the desired Term ID.

    b. Click on DELETE.

    c. In response to the request to confirm the delete action, click OK.

11. When done, click on CLOSE to return to the EXPORT MAPPING screen.

12. Click on CLOSE.

13. Repeat steps 1 – 12 to add, change or delete date ranges for Term IDs for each other Location.

14. When ready to start the Export process, proceed to Section 43.4.4 below.

43.4.4 Export SARS Data to Colleague

Once you have established the Data File Name and Data File Location as well as the Mapping and Term ID options, you will be ready to run an extract.

Note
Before running the Export process, you may wish to change some Reason Codes by selecting each Reason Code to be changed on the EXPORT MAPPING screen, making any changes, and clicking on SAVE.

1. Click on EXPORT STUDENT HISTORY on the SARS·EXCHANGE toolbar; then click on EXPORT HISTORY to display the COLLEAGUE EXPORT menu.

2. Click on either USE DATE RANGE or USE TERM IDS. The selected export screen will be displayed.

3. The DATA FILE NAME field should already be completed. If not, enter the name of the file.

4. The DATA FILE LOCATION field should already be completed. If not, browse to select the location of the Data file.

5. Complete the following steps FOR EACH LOCATION for which data is to be exported:

    a. Click on LOCATION ▼ and select the desired Location. If information for this Location has already been set up and saved, the information will be displayed in the adjacent fields.

    b. In the DEFAULT DURATION field, enter the number of minutes to be used to calculate the stop time of any appointment that does not contain a stop time (e.g., Drop-in Appointments). For example, if a drop-in appointment started at 9:00 a.m., and the default duration is set at 15, the stop time will be calculated as 9:15 a.m.

    c. [Applicable if any location other than ALL is selected.] In the DEFAULT REASON CODE field, select a reason to be used for all appointments that do not have an associated reason. For example, OTHER.

d. [Optional] Click on DISABLED only if the selected Location should not be included in the export process.

e. If exporting using a Date Range,

i) Click on the START DATE field and type in the earliest date for which information will be extracted or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

ii) Click on the END DATE field and type in the latest date for which information will be extracted, or click on ▼ to use the Date Picker.

iii) Click on ENTER TERM ID and type in the name of term that is encompassed by the Start and End Dates. (This setting must be entered each time an extract is run using a Date Range.)

f. If exporting using a Term ID, click on SELECT TERM ID ▼ and select the applicable term.

Note The export process will select all records that contain appointments that contain either the Term ID as a reason code or that have an attended appointment date that falls within the selected Term ID's date range or the specified Date Range.

g. Click on SAVE to save the selected settings for future use.

6. Click on START EXPORT.

Note In cases where more than one reason is associated with an appointment, the export process creates a separate record for each Reason Code.

7. When done, a confirmation message will be displayed.

8. Click on OK.

9. Click on CLOSE. Here is an example of the Output File Format:

Field Name	Starting Position	Field Size	Notes
Student ID	1	20	
Student Name	21	50	
Date of Service	71	6	Format mmddyy
Term ID	77	20	Via the Colleague mapping
Reason	97	30	Via the Colleague mapping
Advisor ID	127	20	From Advisor's Master
Start Time	147	8	Format hh:mm AMPM
Stop Time	155	8	Format hh:mm AMPM
Location Code	163	10	From SARS Database

The export process first runs in "inquiry mode," generating any error messages related to the file. For example, a SARS code may not translate into a valid Colleague contact-type code. When the file is error-free, the process then runs in "update mode." This action creates a record in the Contact file. The corresponding Colleague screen is "CON." When the MIS upload subsequently runs, the contacts are available for inclusion in the SM or SD file as appropriate to the contact type.

43.5 Export to a Custom or Generic Format

SARS Software Products, Inc. offers standard, column-delimited export formats. If these formats do not match your requirements, the export format may be customized to match your data file specifications. There is a charge for customization.

43.5.1 Specifications for Generic Exports

For Custom Exports, skip to Section 43.3.2, below.

▶ **Export Logic**

Records in the Student History File must meet the following requirements to be exported:

1. The appointment date must be within the Start Date and Stop Date.
2. The type of activity must be an appointment ("Activity = A").
3. The attendance must be marked as Yes ("Attend = Y").
4. The appointment must not have been canceled.

▶**Data File Format**

The following column-delimited data file format will be created:

Column Number	Description	Format
1-10	Date of Service	mm/dd/yyyy
11-21	ID format of Student	Annnnnnn *-or-* varies
22-80	Reason for Service	alpha/numeric

▶**Sort Order**

The records in the extract file are sorted on the "Date of Service."

Once these specifications have been met, continue to Section 43.5.2, below.

43.5.2 Export SARS Data

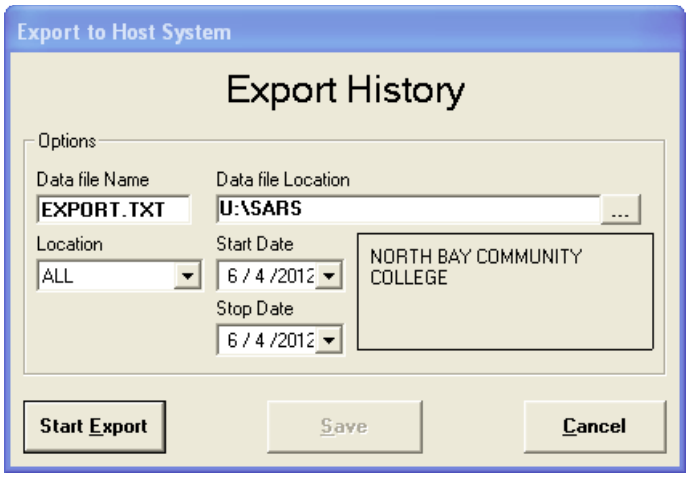
1. Click on EXCHANGE on the SARS·MENU.
2. Click on EXPORT STUDENT HISTORY to display the SELECT EXPORT TYPE screen.
3. [For Custom exports] The Custom option will be enabled only if a custom export has been designed for your school. Click on CUSTOM.

   -or-

[For Generic exports] Click on GENERIC.

4. Click on SAVE. You will be returned to the toolbar.

5. Click on EXPORT STUDENT HISTORY again to display the export screen. Here is an example:



The options are:

- OPTIONS:

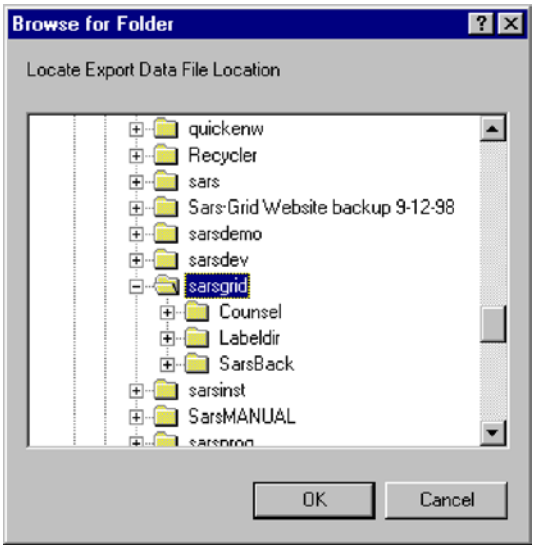
DATA FILE NAME:	Use to specify the name of the data file.
DATA FILE LOCATION:	Use to specify the drive and path of the data file.
LOCATION:	Use to specify the Location for which data will be extracted.
START DATE:	Use to establish the earliest date for which information will be extracted.
STOP DATE:	Use to establish the latest date for which information will be extracted.

- START EXPORT: Use to start moving data from the Students Database to the data file.
- SAVE: Use to save new entries or changes made on the screen.
- CANCEL: Use to close the screen after saving or finishing the export process.

6. Type in the name of the data file in DATA FILE NAME.

7. The storage location of the data file must be selected before exporting data for the first time. Click on the box adjacent to DATA FILE LOCATION. This will display a screen that allows for searching all disk drives and directories.

Here is an example of the screen:



a. Click on the appropriate drive and directory.

b. Click on OK to approve the entries.

Note
Generally, selecting the directory for the export data file is an initial, one time only action. This action needs to be taken again only if the storage location or file name for the export file are changed.

8. Click on the START DATE field and type in the earliest date for which information will be extracted, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)

9. Click on the STOP DATE field and type in the last date for which information will be extracted, or click on ▼ to use the Date Picker.

10. Click on SAVE.

11. Click on START EXPORT. The program will search for your school name, and if a custom export program is associated with that school name, the custom export process will start. When done, a screen will be displayed indicating that all records were processed.

Note
In cases where more than one reason is associated with an appointment, the export process creates a separate record for each Reason Code.

12. Click on OK.

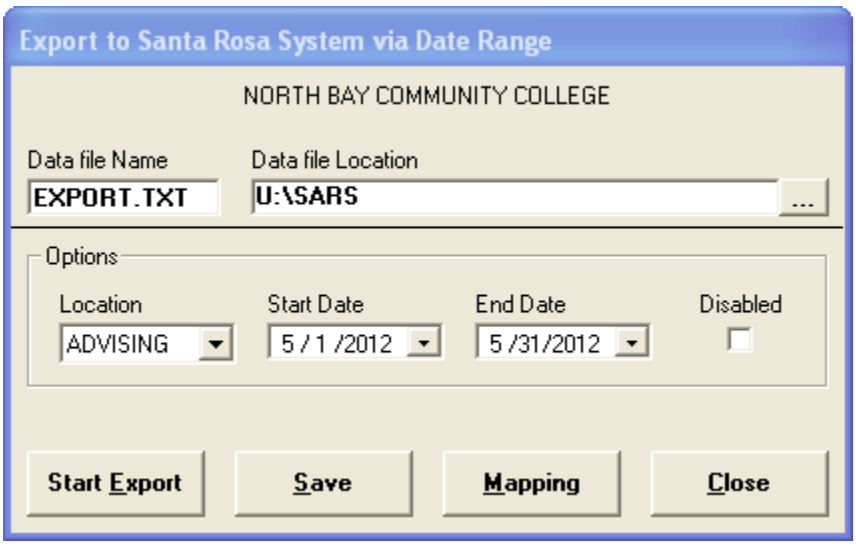
13. Click on CANCEL.

43.6 Export to the Santa Rosa System

[Applicable only to schools that are using the Santa Rosa system.]

43.6.1 Set Up the Santa Rosa System Export Screen

1. Click on the EXCHANGE button on the SARS·MENU.
2. Click on EXPORT STUDENT HISTORY; then click on SELECT EXPORT TYPE.
3. Click on SANTA ROSA SYSTEM.
4. Click on SAVE. You will be returned to the toolbar.
5. Click on EXPORT STUDENT HISTORY to display the EXPORT TO SANTA ROSA SYSTEM VIA DATE RANGE screen. Here is an example:



The options are:

- DATA FILE NAME: Use to specify the name of the data file.
- DATA FILE LOCATION: Use to specify the drive and path of the data file.
- OPTIONS: Use to establish the parameters for the data export for each selected location as follows:

  LOCATION: Use to specify the location for which the export parameters will be established.

  START DATE: Use to select the first date of a date range for which data will be exported.

  END DATE: Use to select the last date of a date range for which data will be exported.

  DISABLED: [Enabled when a Location other than ALL is selected.] Use to indicate that the selected location should be

excluded when exporting data to the Santa Rosa system.

- START EXPORT: Use to initiate the export process.
- SAVE: Use to save the settings on the Export screen.
- MAPPING: Use to gain access to the EXPORT MAPPING sub-screen to assign values to existing SARS Reason Codes that correspond with Reason Codes required by the host system and to specify whether irrelevant Reason Codes should be disregarded when exporting SARS data to the host system.
- CLOSE: Use to exit the screen.

6. In the DATA FILE NAME field, enter the name of the file.
7. In the DATA FILE LOCATION field, browse to select the location of the Data file.
8. Click on LOCATION ▼ and select the desired Location.
9. Click on the START DATE field and type in the earliest date for which information will be extracted, or click on ▼ to use the Date Picker. (See "Date Picker" in Appendix B.)
10. Click on the END DATE field and type in the latest date for which information will be extracted, or click on ▼ to use the Date Picker.
11. [Optional] Click on DISABLED only if the selected Location should not be included in the export process.
12. Click on MAPPING to set up Reason Codes on the EXPORT MAPPING screen (see Section 43.6.2, below).
13. Repeat steps 8 - 12 for each and every Location.
14. When done, proceed to Section 43.6.3 to begin the extract process.

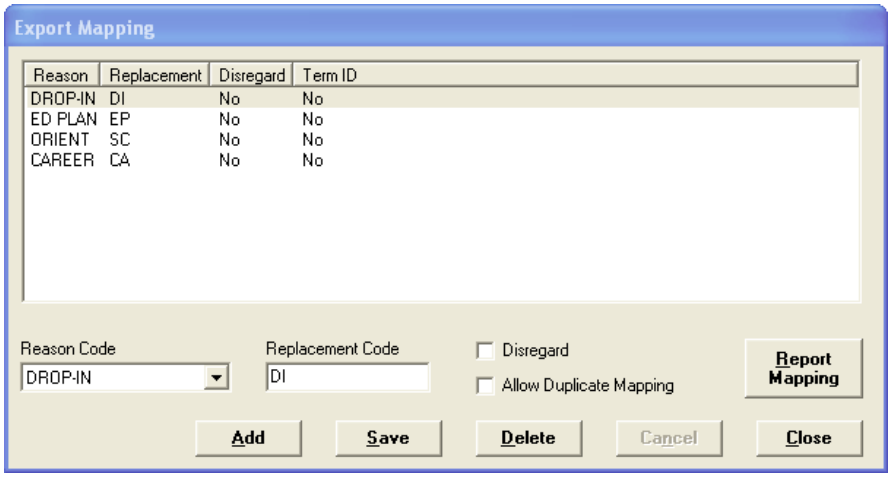
43.6.2 Add Reason Codes Using the Export Mapping Screen

[applicable only if a Location is selected; disregard if Location = ALL]

The EXPORT MAPPING screen serves two purposes:

- To assign values to existing SARS Reason Codes that correspond with Reason Codes required by the host system.
- To specify whether irrelevant Reason Codes should be disregarded when exporting SARS data to the host system.

Here is an example of the EXPORT MAPPING screen:



The options are:

- REASON CODE: Use to select a Reason Code for which replacement and/or disregard values are to be assigned.
- REPLACEMENT CODE: Use to enter the code that is to be used by the host system to represent the selected Reason Code. For example, type in the letters EP if EP will represent the SARS Reason Code "Ed Plan."
- DISREGARD: Use to indicate that the selected Reason Code is irrelevant and should not be included in data exported to the host system.
- ALLOW DUPLICATE MAPPING: Use to permit entry of multiple mappings for the same reason code.
- REPORT MAPPING: Use to generate a list of mappings for preview or printing.
- ADD: Use to make the fields available for entering a new Reason Code on the list.
- SAVE: Use to save the entries made on the screen.
- DELETE: Use to remove an entry from the list.
- CANCEL: Use to cancel actions taken on the screen.
- CLOSE: Use to exit the screen.

1. After selecting the Data File Name, Data File Location and Location on the Export screen, click on MAPPING to display the EXPORT MAPPING screen.

2. To add a Reason Code and assign characteristics to it:

   a. Click on ADD. The DISREGARD field will be enabled.

b. Click on REASON CODE ▼ and select the desired REASON CODE to be added to the list.

Note
If the desired Reason Code is not displayed, one must be created by returning to SARS·UTIL, LOCATION MAINTENANCE, and adding a Reason Code in the Reason Codes screen. (See Part I, Section 4.10.1, "Add a Reason Code.")

c. If applicable, click on REPLACEMENT CODE and type in the host system-compatible code that represents the Reason Code.

d. If the Reason Code should not be used for export purposes, click on DISREGARD. Otherwise, leave this checkbox blank.

e. If desired, click on ALLOW DUPLICATE MAPPING to permit the entry of multiple mappings for the same reason code.

f. Click on SAVE.

g. Repeat step 2 to add other Reason Codes and assign applicable host system characteristics to them.

3. To change information associated with a Reason Code:

   a. Click on the Reason Code to be changed. The existing characteristics will be displayed in the associated fields.

   b. Make changes, as appropriate.

   c. Click on SAVE.

   d. Repeat step 3 as needed to change the characteristics of other Reason Codes.

4. To delete a Reason Code and it's assigned characteristics:

   a. Click on the Reason Code to be deleted. The existing characteristics will be displayed in the associated fields.

   b. Click on DELETE. A confirmation message will be displayed.

   c. Click on YES. The Reason Code will be deleted from the list, but it will still be available from the Reason Code menu for later use, if desired.

   d. Repeat step 4 as needed to delete other Reason Codes.

5. Click on CLOSE.

Note
If a Reason Code is not listed on EXPORT MAPPING screen, it will be transferred to a flat file as is, without being mapped to a different value.

43.6.3 Export SARS Data to the Santa Rosa System

Once you have established the Data File Name and Data File Location as well as the Mapping options (if applicable), you will be ready to run an extract.

Note
Before running the Export process, you may wish to change some Reason Codes by selecting each Reason Code to be changed on the EXPORT MAPPING screen, making any changes, and clicking on SAVE.

1. Click on EXPORT STUDENT HISTORY on the SARS·EXCHANGE toolbar; then click on EXPORT HISTORY to display the export screen.

2. The DATA FILE NAME field should already be completed. If not, enter the name of the file.

3. The DATA FILE LOCATION field should already be completed. If not, browse to select the location of the Data file.

4. Complete the following steps FOR EACH LOCATION for which data is to be exported:

   a. Click on LOCATION ▼ and select the desired Location. If information for this Location has already been set up and saved, the information will be displayed in the adjacent fields.

   b. In the DEFAULT DURATION field, enter the number of minutes to be used to calculate the stop time of any appointment that does not contain a stop time (e.g., Drop-in Appointments). For example, if a drop-in appointment started at 9:00 a.m., and the default duration is set at 15, the stop time will be calculated as 9:15 a.m.

   c. [Applicable if any location other than ALL is selected.] In the DEFAULT REASON CODE field, select a reason to be used for all appointments that do not have an associated reason. For example, OTHER.

   d. [Optional] Click on DISABLED only if the selected Location should not be included in the export process.

   e. If exporting using a Date Range,

      (i) Click on START DATE ▼ and select the desired start date.

      (ii) Click on STOP DATE ▼ and select the desired stop date.

   f. Click on SAVE to save the selected settings for future use.

5. Click on START EXPORT.

   Note
   In cases where more than one reason is associated with an appointment, the export process creates a separate record for each Reason Code.

6. When done, a message will be displayed stating that all records were processed.

7. Click on OK.

8. Click on CLOSE.

Here is an example of the Output File Format:

Field Name	Starting Position	Field Size	Notes
Short_Name	1	20	
AdvisorsID	21	4	1st 4 digits of Advisor's Alt ID
Student_ID	25	9	ID without dashes
Student_Full_Name	34	50	
Student_Birthdate	84	8	Format YYYYMMDD
Appt_Date	92	8	Format YYYYMMDD

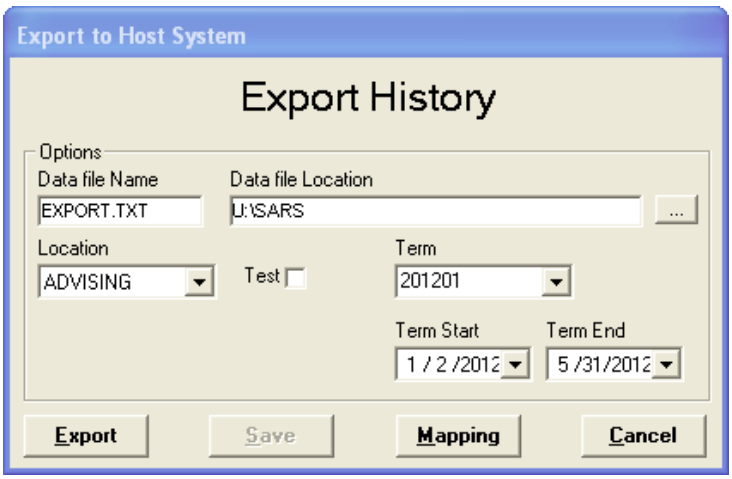
At this stage, a program written by the host system picks up the extracted data and processes it. For more information, contact a Santa Rosa system representative.

43.7 Export to the LA District System

[Applicable only to schools that are using the LA District system.]

43.7.1 Set Up the LA District System Export Screen

1. Click on the EXCHANGE button on the SARS·MENU.
2. Click on EXPORT STUDENT HISTORY; then click on SELECT EXPORT TYPE.
3. Click on LA DISTRICT.
4. Click on SAVE. You will be returned to the toolbar.
5. Click on EXPORT STUDENT HISTORY to display the EXPORT TO HOST SYSTEM screen. Here is an example:



The options are:

- DATA FILE NAME: Use to specify the name of the data file.
- DATA FILE LOCATION: Use to specify the drive and path of the data file.
- LOCATION: Use to specify the location for which the export parameters will be established.
- TEST: Use to test the export process.
- TERM: Use to select a term that encompasses the dates for which data will be extracted.
- TERM START: Use to select the start date of the term for which data will be extracted.
- TERM END: Use to select the last date of the term for which data will be extracted.
- EXPORT: Use to initiate the export process.

- SAVE: Use to save the settings on the Export screen.
- MAPPING: Use to gain access to the EXPORT MAPPING sub-screen to assign values to existing SARS Reason Codes that correspond with Reason Codes required by the host system and to specify whether irrelevant Reason Codes should be disregarded when exporting SARS data to the host system.
- CANCEL: Use to cancel the export.

6. In the DATA FILE NAME field, enter the name of the file.
7. In the DATA FILE LOCATION field, browse to select the location of the Data file.
8. Click on LOCATION ▼ and select the desired Location.
9. Click on TERM ▼ and select the term for which information will be extracted.
10. Click on TERM START ▼ and select the earliest date in the term for which information will be extracted using the Date Picker.
11. Click on TERM END ▼ and select the latest date for which information will be extracted.
12. Click on MAPPING to set up Reason Codes on the EXPORT MAPPING screen (see Section 43.7.2, below).
13. Repeat steps 8 - 12 for each and every Location.
14. When done, proceed to Section 43.7.3 to begin the extract process.

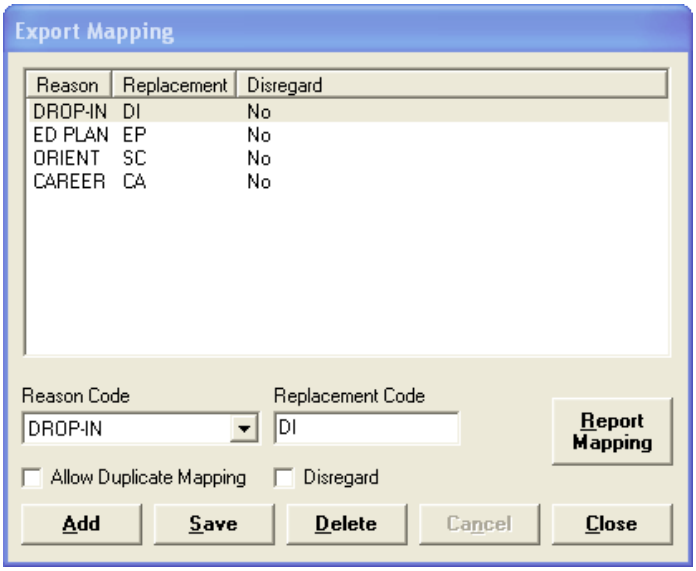
43.7.2 Add Reason Codes Using the Export Mapping Screen

[applicable only if a Location is selected;; disregard if Location = ALL]

The EXPORT MAPPING screen serves two purposes:

- To assign values to existing SARS Reason Codes that correspond with Reason Codes required by the host system.
- To specify whether irrelevant Reason Codes should be disregarded when exporting SARS data to the host system.

Here is an example of the screen:



The options are:

- REASON CODE: Use to select a Reason Code for which Replacement, and/or Disregard values are to be assigned.
- REPLACEMENT CODE: Use to enter the code that is to be used by the host system to represent the selected Reason Code. For example, type in the letters EP if EP will represent the SARS Reason Code "Ed Plan."
- ALLOW DUPLICATE MAPPING: Use to permit entry of multiple mappings for the same reason code.
- DISREGARD: Use to indicate that the selected Reason Code is irrelevant and should not be included in data exported to the host system.
- REPORT MAPPING: Use to generate a list of mappings for preview or printing.
- ADD: Use to make the fields available for entering a new Reason Code on the list.
- SAVE: Use to save the entries made on the screen.
- DELETE: Use to remove an entry from the list.
- CANCEL: Use to cancel actions taken on the screen.
- CLOSE: Use to exit the screen.

1. After selecting the Data File Name, Data File Location and Location on the Export screen, click on MAPPING to display the EXPORT MAPPING screen.

2. To add a Reason Code and assign characteristics to it:

   a. Click on ADD. The DISREGARD field will be enabled.

   b. Click on REASON CODE ▼ and select the desired REASON CODE to be added to the list.

   Note
   If the desired Reason Code is not displayed, one must be created by returning to SARS·UTIL, LOCATION MAINTENANCE, and adding a Reason Code in the Reason Codes screen. (See Part I, Section 4.10.1, "Add a Reason Code.")

   c. If applicable, click on REPLACEMENT CODE and type in the host system-compatible code that represents the Reason Code.

   d. If the Reason Code should not be used for export purposes, click on DISREGARD. Otherwise, leave this checkbox blank.

   e. If desired, click on ALLOW DUPLICATE MAPPING to permit the entry of multiple mappings for the same reason code.

   f. Click on SAVE.

   g. Repeat step 2 to add other Reason Codes and assign the host system characteristics to them.

3. To change information associated with a Reason Code:

   a. Click on the Reason Code to be changed. The existing characteristics will be displayed in the associated fields.

   b. Make changes, as appropriate.

   c. Click on SAVE.

   d. Repeat step 3 as needed to change the characteristics of other Reason Codes.

4. To delete a Reason Code and its assigned characteristics:

   a. Click on the Reason Code to be deleted. The existing characteristics will be displayed in the associated fields.

   b. Click on DELETE. A confirmation message will be displayed.

   c. Click on YES. The Reason Code will be deleted from the list, but it will still be available from the Reason Code menu for later use, if desired.

   d. Repeat step 4 as needed to delete other Reason Codes.

5. Click on CLOSE.

6. To view or print a mapping report, click on Report Mapping and follow the instructions on the criteria screen.

Note
If a Reason Code is not listed on EXPORT MAPPING screen, it will be transferred to a flat file as is, without being mapped to a different value.

43.7.3 Export SARS Data to the Host System

Once you have established the Data File Name and Data File Location as well as the Mapping options (if applicable), you will be ready to run an extract.

Note
Before running the Export process, you may wish to change some Reason Codes by selecting each Reason Code to be changed on the EXPORT MAPPING screen, making any changes, and clicking on SAVE.

1. Click on EXPORT STUDENT HISTORY on the SARS·EXCHANGE toolbar; then click on EXPORT HISTORY to display the EXPORT TO HOST SYSTEM screen.

2. The DATA FILE NAME field should already be completed. If not, enter the name of the file.

3. The DATA FILE LOCATION field should already be completed. If not, browse to select the location of the Data file.

4. Complete the following steps FOR EACH LOCATION for which data is to be exported:

   a. Click on LOCATION ▼ and select the desired Location. If information for this Location has already been set up and saved, the information will be displayed in the adjacent fields.

   b. [If a single Location is selected] Click on DISABLED only if the selected Location should not be included in the export process.

   c. Click on Term ▼ and select the term for which the information will be extracted.

   d. Click on the TERM START ▼ and select the earliest date for which information will be extracted using the Date Picker. (See “Date Picker” in Appendix B.)

   e. Click on the TERM END ▼ and select the latest date for which information will be extracted using the Date Picker.

   f. Click on SAVE to save the selected settings for future use.

5. Click on EXPORT.

   Note
   In cases where more than one reason is associated with an appointment, the export process creates a separate record for each Reason Code.

6. When done, a message will be displayed stating that all records were processed.

7. Click on OK.

8. Click on CLOSE.

Here is an example of the Output File Format:

Field Name	Starting Position	Field Size
Student ID	1	9
Yr/SEM	10	5
Campus	15	1
Dept	16	10
Contact Date	26	16
Contact Type	42	15
Status	57	1
Employee No	58	6
Emp Last Name	64	18
Emp First Init	82	1
Emp Mid Init	83	1
Emp No (Alt ID)	84	8

SECTION 44 STUDENT MAINTENANCE

44.0 Overview

This Section covers maintaining student information in the SARS DATABASE. It includes the following information:

44.1 Add a New Student

44.2 Modify Data about a Student, Including Changing an Identifier

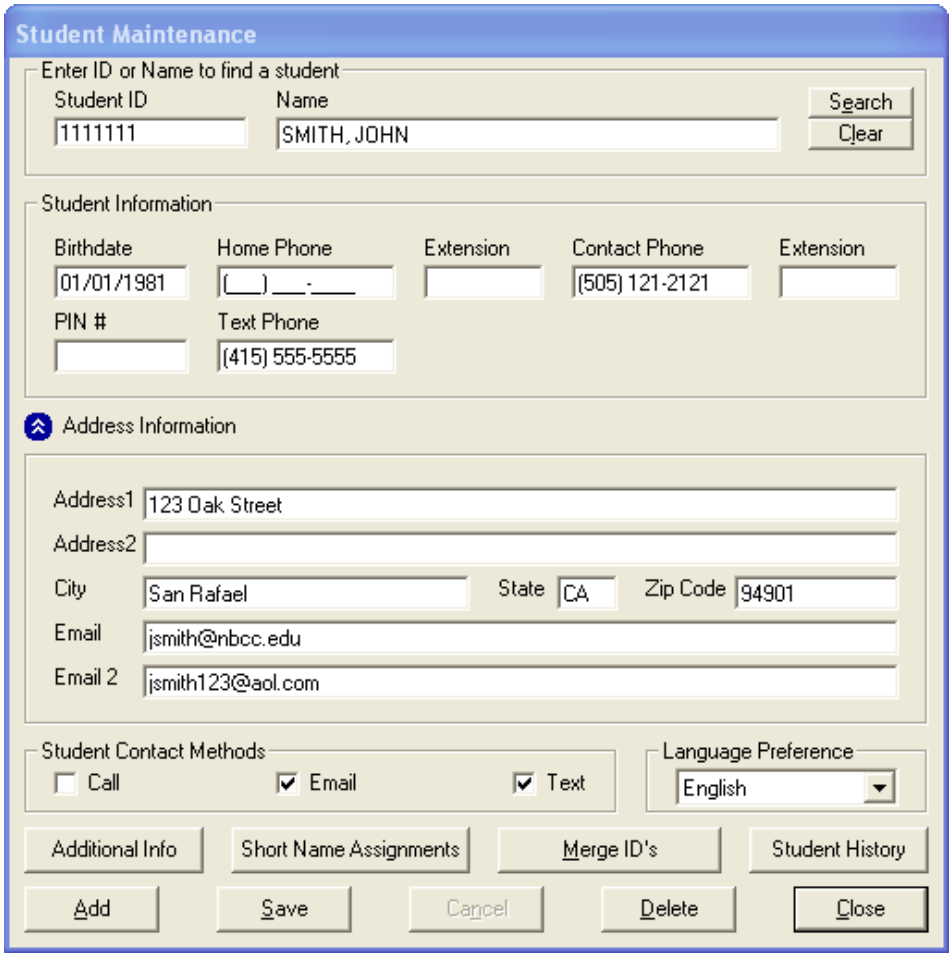
44.3 Merge Appointment Histories and/or Student Identifier

44.4 Delete a Student

These functions are performed in the STUDENT MAINTENANCE option in SARS·UTIL.

The Student Maintenance screen is used to add a new student, to modify information about an existing student, including ID, and to delete a student.

Here is an example of the screen when it is expanded to display the address fields.



The options are:

- ENTER ID OR NAME TO FIND A STUDENT: Use to retrieve information about a student.

  STUDENT ID: Use to display or enter the student's identifier.

  NAME: Use to display or enter the student's last name, first name.

  SEARCH: Use to find a student when the identifier is not known.

  CLEAR: Use to clear the screen for another entry in ID or NAME.

- STUDENT INFORMATION:

  BIRTH DATE: Use to display or enter the student's date of birth.

  HOME PHONE: Use to display or enter the student's permanent telephone number.

  EXTENSION: Use to display or enter the extension to the permanent telephone number.

  CONTACT PHONE: Use to display or enter the student's contact telephone number.

  EXTENSION: Use to display or enter the extension to the contact telephone number.

  PIN #: Use to enter an optional PIN number to be used by the student to log into the web interface instead of requiring a birth date.

  TEXT PHONE: Use to record the student's cell phone number if it has text messaging capabilities.

- ADDRESS INFORMATION: Use to display or enter the student's address.

  ADDRESS 1: Use to enter the student's primary street address.

  ADDRESS 2: Use to enter the student's secondary street address.

  CITY: Use to display or enter the city of the student's address.

  STATE: Use to display or enter the state of the student's address. Up to 20 characters are available to accommodate international addresses.

  ZIP CODE: Use to display or enter the zip code of the student's address.

  E-MAIL: Use to display or enter the student's e-mail address.

E-MAIL 2:	Use to display or enter a second e-mail address for the student.
• STUDENT CONTACT METHODS:	Use to select the acceptable method(s) for contacting the student. Any or all may be selected.
CALL:	Use to select the option to call the student by telephone. This option is required if SARS·CALL will be used to make automated telephone calls for appointment reminders or other messages.
EMAIL:	Use to specify that the student may be contacted via e-mail. This option is required if SARS·CALL will be used to send email messages for appointment reminders or other notices.
TEXT:	Use to specify that the student may be contacted via text messaging. This option is required for students to receive text receipts of appointment confirmations.
• LANGUAGE PREFERENCE:	Use to select the primary language of the student.
• ADDITIONAL INFO:	Use to access the ADDITIONAL INFORMATION screen.
• SHORT NAME ASSIGNMENTS:	Use to access a screen on which the student may be assigned to a specific advisor.
• MERGE ID'S:	Use to correct an invalid identifier, to merge appointment history for a student who has been assigned more than one identifier, or to merge appointment history while keeping two valid ID's for a student.
• STUDENT HISTORY:	Use to access the STUDENT HISTORY screen.
• ADD:	Use to make fields available to enter new data.
• SAVE:	Use to save new entries or changes made on the screen.
• CANCEL:	Use to terminate the action without saving.
• DELETE:	Use to remove a student from the system. This option is available only if the student has no appointment history, no alerts, no notes, and no drop-ins in the system.
• CLOSE:	Use to exit the screen.

44.1 Add a New Student

Student information may already exist in the database if an initial appointment has been scheduled for the student or if information about the student is stored in a school-maintained database to which SARS·GRID has access. However, the STUDENT MAINTENANCE screen may

be used when a department wishes to enter student information for all of its new students at one time, such as at the beginning of the term, rather than waiting until an initial appointment is made. This method is particularly useful for departments that deal with special population groups. Entering student information for new students in advance facilitates appointment making and reporting. In addition to adding identifying information about the student (such as ID, name, birth date, telephone numbers, and e-mail and mailing address), you may also enter Additional Information, if the school has chosen to enable this feature. The e-mail and mailing address fields are available for schools that wish to develop custom mailing applications.

1. Click on UTIL on the SARS·MENU.

2. Click on STUDENT MAINTENANCE.

3. Click on ADD.

4. Type the student's identifier in ID (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).

   -or-

   If the student's ID format is different from that provided in the ID field, click on the field and then press **F9**. The field will change to accept a secondary format, or (if more than two ID formats exist in the system), an ID FORMAT SELECTION screen will be displayed from which the format may be selected for use.

5. In the NAME field, enter the name of the student. The format of the student's name should be: LAST NAME, FIRST NAME.

6. In STUDENT INFORMATION, enter the student's Birthdate, Home Phone (and extension), and Contact Phone number (and extension), PIN # (if desired), and Text Phone number (if available).

7. Click on the icon adjacent to ADDRESS INFORMATION and then enter the student's street address, city, state, zip code, and e-mail address(es).

   Note
   The State field allows up to 20 characters to accommodate international addresses.

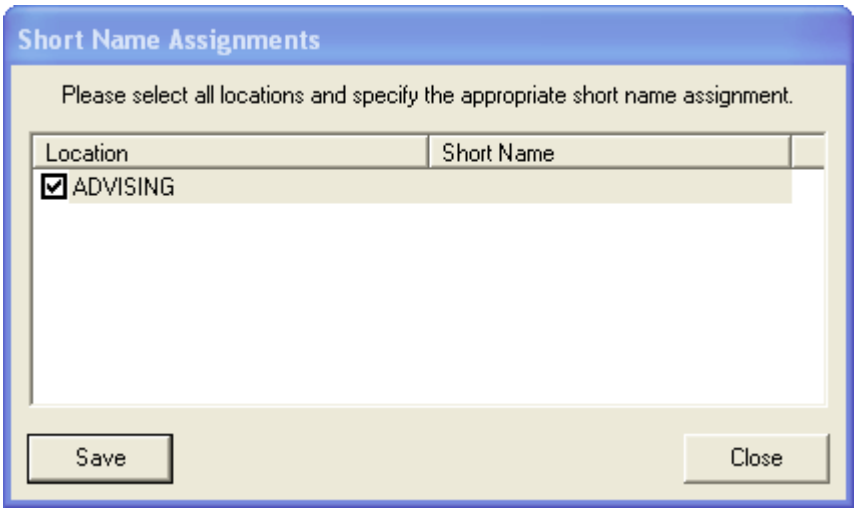
8. In the STUDENT CONTACT METHODS panel, click on CALL, EMAIL and/or TEXT to specify the acceptable methods of contacting the student.

   Note
   CALL is required if the college will be using SARS·CALL to send out appointment reminders or broadcast messages. EMAIL is required if the college will be using SARS·CALL to send email messages to students. TEXT will be available if the college has a license for that option.

9. Click on LANGUAGE PREFERENCE and then select the student's primary language.

10. If the ADDITIONAL INFO button is enabled, you may click on ADDITIONAL INFO to display any ADDITIONAL INFORMATION about the student. If the user has been given permission to record a response to one or more questions, enter a date, list, text, or yes/no response as appropriate. Then click on SAVE. (See also in "Additional Information" in Part IV, Section 23 or Part V, Section 30.)

11. To assign the student to a specific advisor, click on SHORT NAME ASSIGNMENTS. A SHORT NAME ASSIGNMENTS screen will be displayed. Here is an example:



   a. Click on the LOCATION checkbox applicable to this student.

   b. Click on the space in the Short Name column to display a drop-down list of advisors. Select the individual name to which the student is assigned.

   c. Click on SAVE.

12. Click on SAVE on the STUDENT MAINTENANCE SCREEN.

13. Click on CLOSE.

44.2 Modify Data about a Student, Including Changing an Identifier

1. Click on UTIL on the SARS·MENU.

2. Click on STUDENT MAINTENANCE.

3. Type the student's identifier in STUDENT ID. Upon typing the last digit of the identifier, the existing information for the remaining fields will appear in the boxes below if that student's ID is included in the database.

4. If the student's ID is not known, type the student's full name or a portion thereof in NAME and click on SEARCH. A list of all students with that name will appear.

   a. Click on the selected name.

   b. Click on OK to display any existing information.

5. To correct any incorrect information, make the changes as needed. Then click on SAVE.

Note
Information changed using the STUDENT MAINTENANCE screen will be reflected on all appointments.

6. To add an ID for the student that has a different format (such as a Colleague ID), follow the steps below:

   a. Place the cursor in the STUDENT ID field.

   b. Press **F9**.

   c. If only one other ID format has been created for the Location, the ID field will now accept the alternate format. If more than two ID formats exist for the Location, select the ID Format to be used.

   d. Enter the secondary identifier in the field, which will now accept the new format.

   e. Click on SAVE.

   Both identifiers for the student will be retained in the database.

   Note
   If a student has multiple IDs in the database that are not linked together, merge the appointment histories and/or student identifiers. (See "Merge Appointment Histories and/or Student Identifiers" in this Part, Section 44.3.)

7. To clear the screen for another entry in ID or NAME, click on CLEAR.

8. Click on CLOSE.

44.3 Merge Appointment Histories and/or Student Identifiers

A student may have two or more names or identifiers in the database for various reasons, such as:

- If a scheduler incorrectly entered the ID and name when making an appointment or adding the student to the drop-in list.
- If the student was initially assigned a temporary ID and subsequently had a school ID entered into the database.
- If a scheduler entered another, but also valid, ID for a student (e.g. a Colleague ID and a Banner ID).
- If the data came from a host computer into SARS·GRID and the student's separate ID's are not joined together.

In such cases, appointment history for a student may be stored separately under the IDs that were used. Two options are available for correcting this problem. They are:

- Merge ID's and eliminate the invalid name or ID. This will store all student history and activity under a single, valid ID.

- Merge ID's but keep both ID's. This will merge all existing appointment history for a single student having two IDs without eliminating the other valid ID. All student history and activity will be accessible under either of the IDs.

To facilitate identification of a student who has two or more IDs, generate the "Duplicate ID Report." (See "Duplicate ID Report" in Part VI, Section 37.7.)

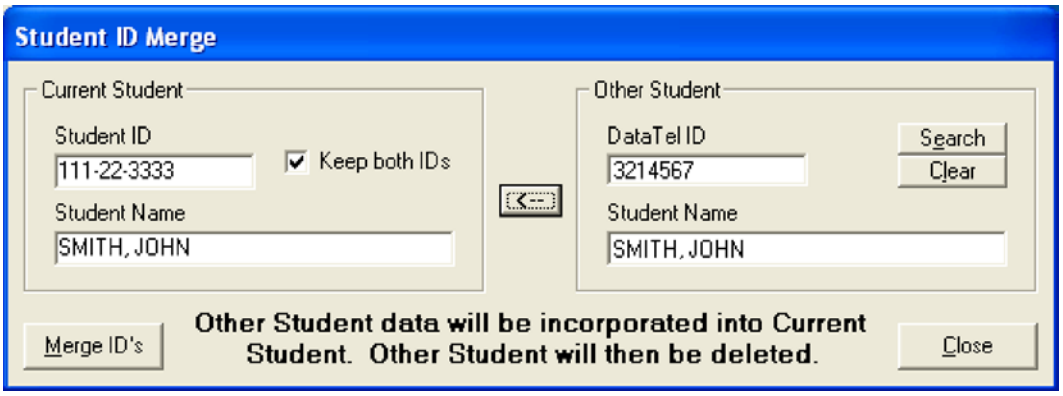
1. Click on UTIL on the SARS·MENU.

2. Click on STUDENT MAINTENANCE.

3. Type the student's identifier in STUDENT ID (either the valid or invalid ID) or press F9 to toggle to the correct ID format and then enter the ID. Upon typing the last digit of the identifier, the existing information for the remaining fields will appear in the boxes below.

4. To merge a student's appointment history, click on MERGE ID'S to display the STUDENT ID MERGE screen.

   Here is an example:



   In the fields under CURRENT STUDENT, the Student ID and Student Name that you just entered on the STUDENT MAINTENANCE screen will be displayed. Note that a KEEP BOTH IDS checkbox is displayed.

5. In the ID field under OTHER STUDENT, type the other ID that is associated with the student. Upon typing the last digit of the identifier, the name associated with that ID will be displayed in the Student Name field.

6. If the student's ID is not known, type the student's full name or a portion thereof in NAME and click on SEARCH. A list of all students with that name will appear.

   a. Click on the selected name.

   b. Click on OK to display any existing information.

7. To transfer all appointment activity and student data from the OTHER STUDENT ID to the CURRENT STUDENT ID <u>and to delete the Other Student identifier</u>, leave the KEEP BOTH IDS option unchecked and ensure that the arrow is pointing toward the CURRENT STUDENT side of the screen (←). If the arrow is not pointing to the left, click on the arrow button. This action will toggle it to point to the left-hand side.

   -or-

To transfer all appointment activity and student data from the CURRENT STUDENT ID to the OTHER STUDENT ID and to delete the Current Student identifier, leave the KEEP BOTH IDS option unchecked and ensure that the arrow is pointing toward the OTHER STUDENT side of the screen (→). If the arrow is not pointing to the right, click on the arrow button. This action will toggle it to point to the right-hand side.

-or-

To merge all appointment activity and student data under both identifiers leaving both ID's intact, click on the KEEP BOTH IDS checkbox. It does not matter which way the arrow is pointing.

8. Click on MERGE ID'S. A confirmation message will be displayed.

9. Click on YES. The appointment histories will be merged, the invalid name and ID will be eliminated (if applicable), and you will be returned to the STUDENT MAINTENANCE screen.

44.4 Delete a Student

A student may be deleted only if no appointment history, including drop-in visits, exists for that student.

1. Click on UTIL on the SARS·MENU.

2. Click on STUDENT MAINTENANCE.

3. Type the student's identifier in STUDENT ID., or press F9 to toggle to the correct ID format and then enter the student's ID. Upon typing the last digit of the student's ID, the existing information for the remaining fields will appear in the boxes below if that student's ID is included in the SARS database.

4. If the student's ID is not known, type the student's full name or a portion thereof in NAME and press ↵ . A list of students with that name will appear.

   a. Click on OK to display any existing information.

   b. Click on the selected name.

5. Click on DELETE. A confirmation message will be displayed.

6. Click on YES to confirm the deletion.

7. Click on CLOSE.

SECTION 45 –THE e·SARS WEB INTERFACE

45.0 Overview

This Section provides instructions on installing and customizing the web interface software. The school's technology staff should perform the installation and initial configuration. The system administrators may need to refer to Section 45.1.6 and 45.1.7 to configure specific items for their respective Locations.

The following sections will lead the user through the installation, set up, and customization processes.

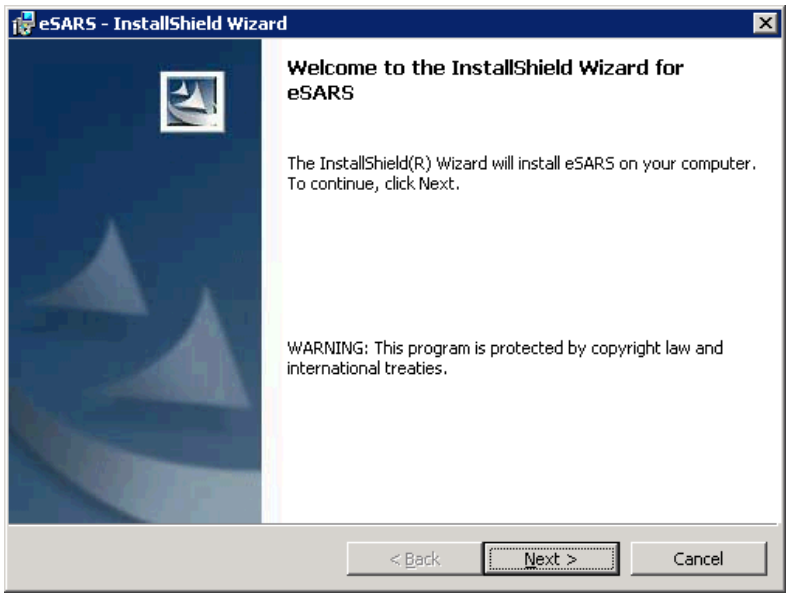
45.1 Set up the Application

The web interface requires 5 MB of free disk space and may be installed on any Windows server that is connected to the school's network. Eight steps are required to complete the installation process. They are:

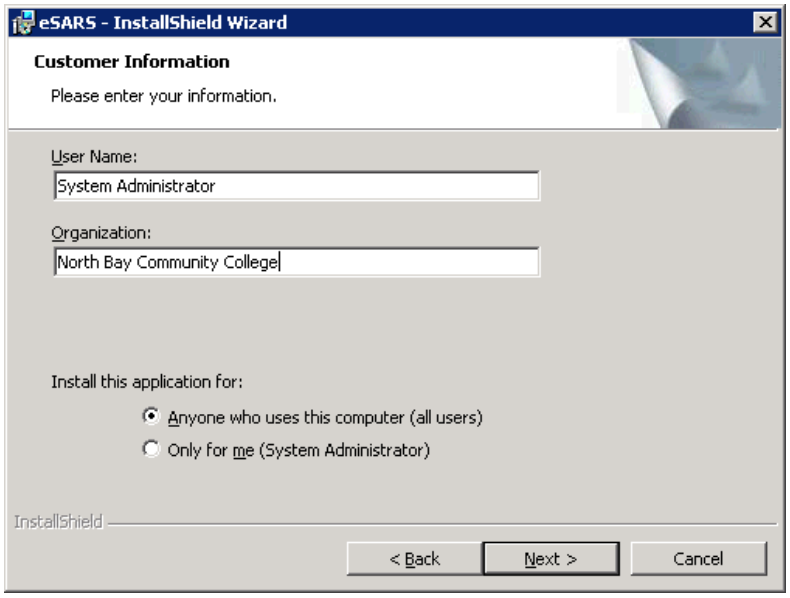
1. Run the setup program on the web server (Section 45.1.1).
2. Create a directory for the web pages for each department using SARS·GRID that will be web-enabled (Section 45.1.2).
3. Create a Virtual Directory (Section 45.1.3).
4. Copy the contents of the Pages directory from installation directory into each department directory (Section 45.1.4).
5. Edit the Init.asp in each department directory (Section 45.1.5).
6. Prepare to configure the web interface (Section 45.1.6).
7. Configure the web interface (Section 45.1.7).
8. Test the settings from the Student log-on page (Section 45.1.8).

45.1.1 Install the Application

1. Run the e·SARS setup program on the web server. The following welcome screen will be displayed:



2. Click on NEXT to display the CUSTOMER INFORMATION screen. Here is an example:



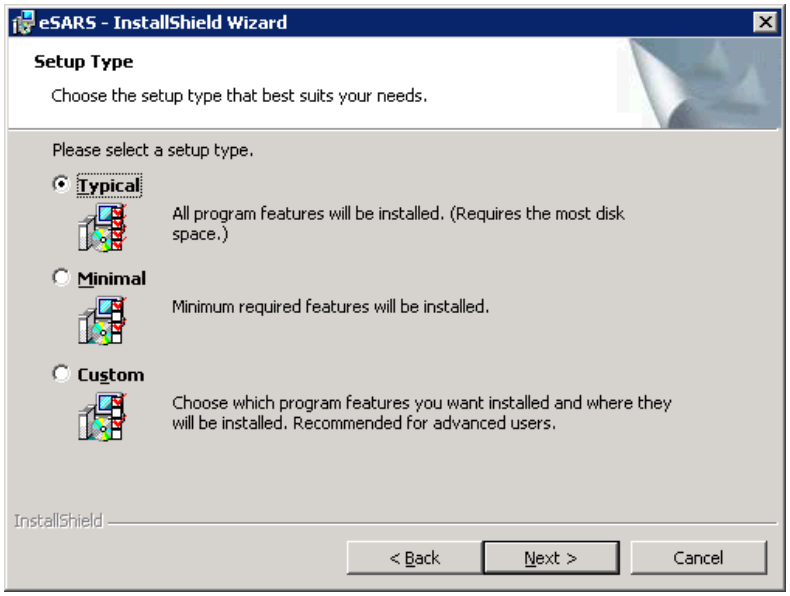
3. In the USER NAME field, type in the name of the user.

4. In the ORGANIZATION field, type in the name of the school.

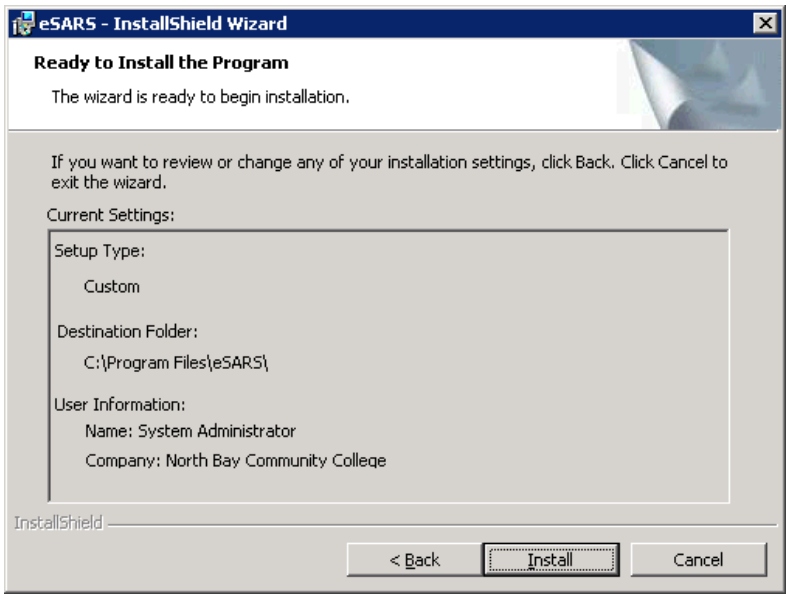
5. Click on either ANYONE WHO USES THIS COMPUTER (ALL USERS) or ONLY FOR ME (SYSTEM ADMINISTRATOR).

6. Click on NEXT. The SETUP TYPE screen will be displayed.

It looks like this:

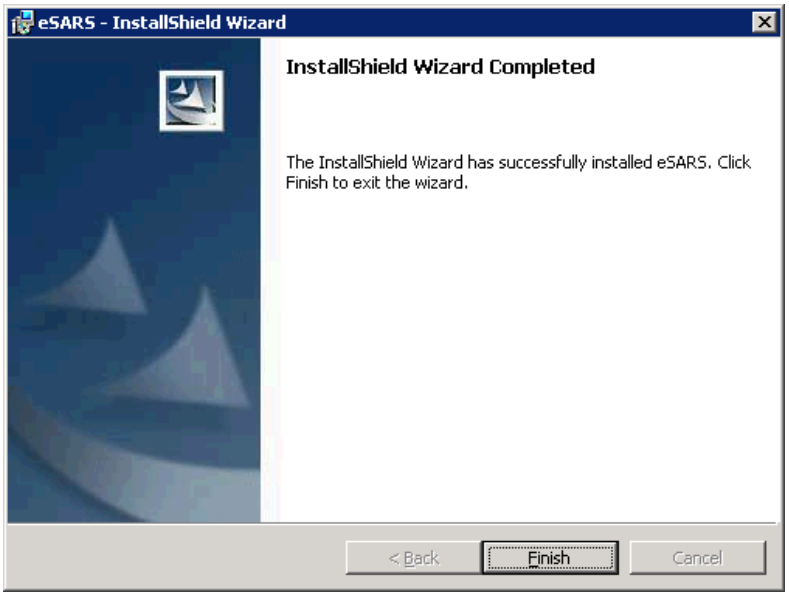


7. Click on TYPICAL and then click on NEXT. The READY TO INSTALL THE PROGRAM screen will be displayed. Here is an example:



8. Click on INSTALL.

When the installation is complete, the following screen will be displayed.



9. Click on FINISH.

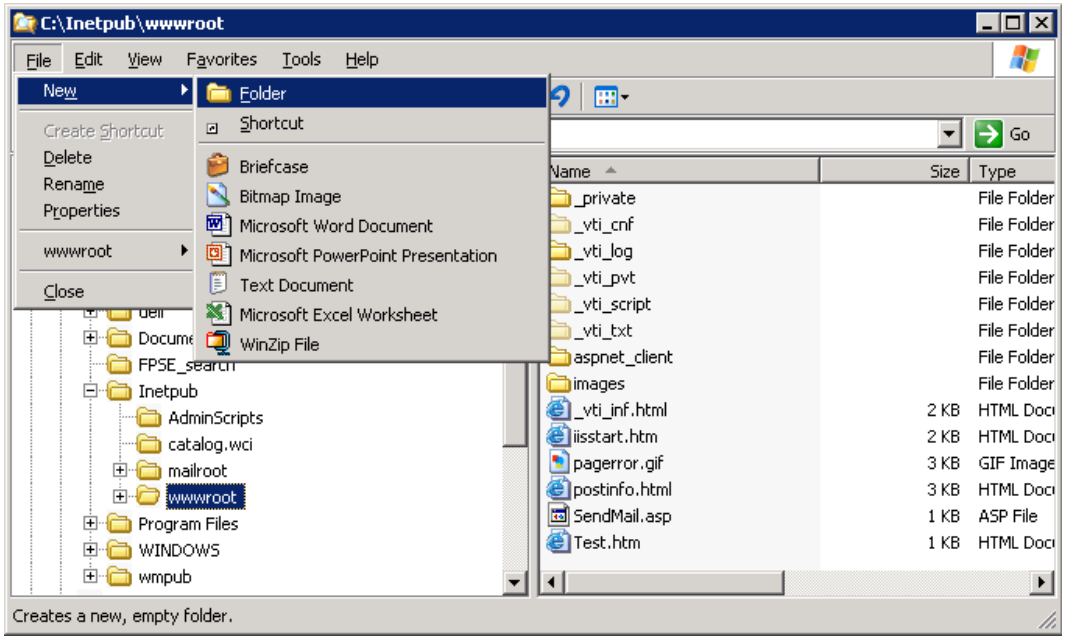
45.1.2 Create a Directory

A separate directory should be made under this directory for each department (e.g., Advising, EOPS, Career, Transfer).

1. While in the X:\Inetpub\wwwroot directory, click on FILE.

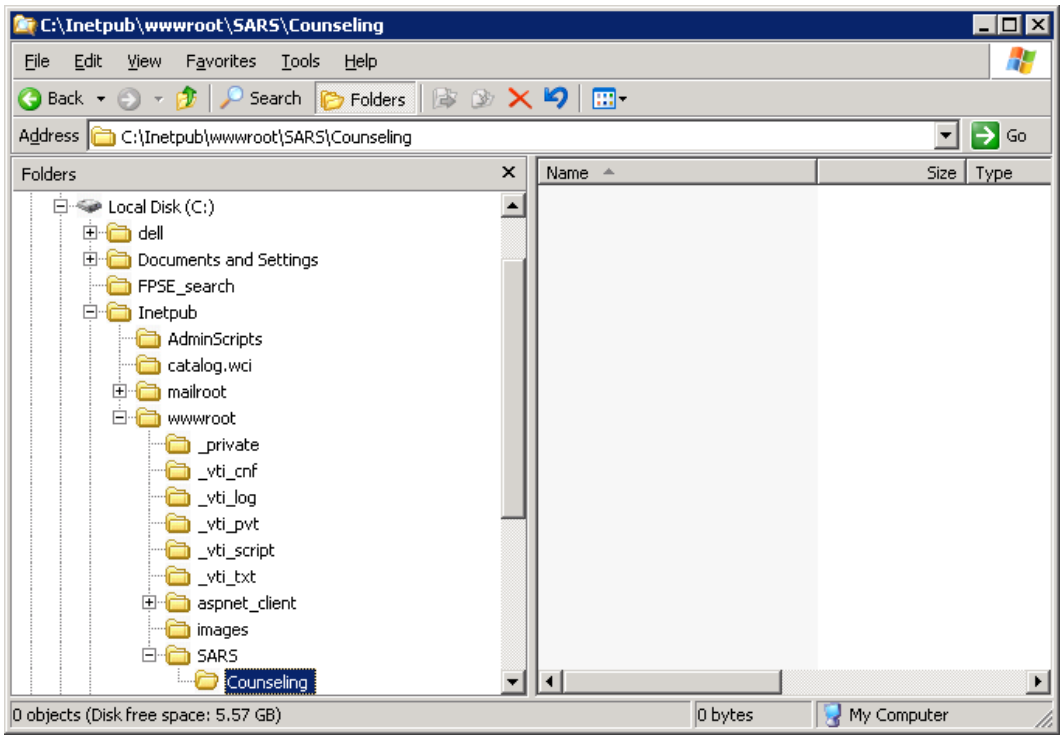
2. Click on NEW.

3. Click on FOLDER. The screen will look like this:



4. Create a new folder within the wwwroot directory by typing in the name (e.g., SARS).

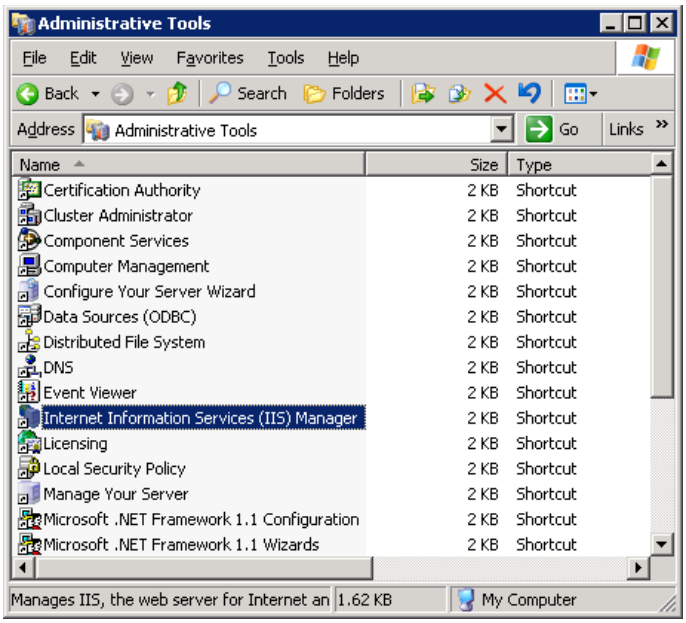
5. With the focus on the SARS directory, click on FILE, then click on NEW, then click on FOLDER to create a directory for a Location in the school (e.g., Advising). Here is an example of how the screen will appear:



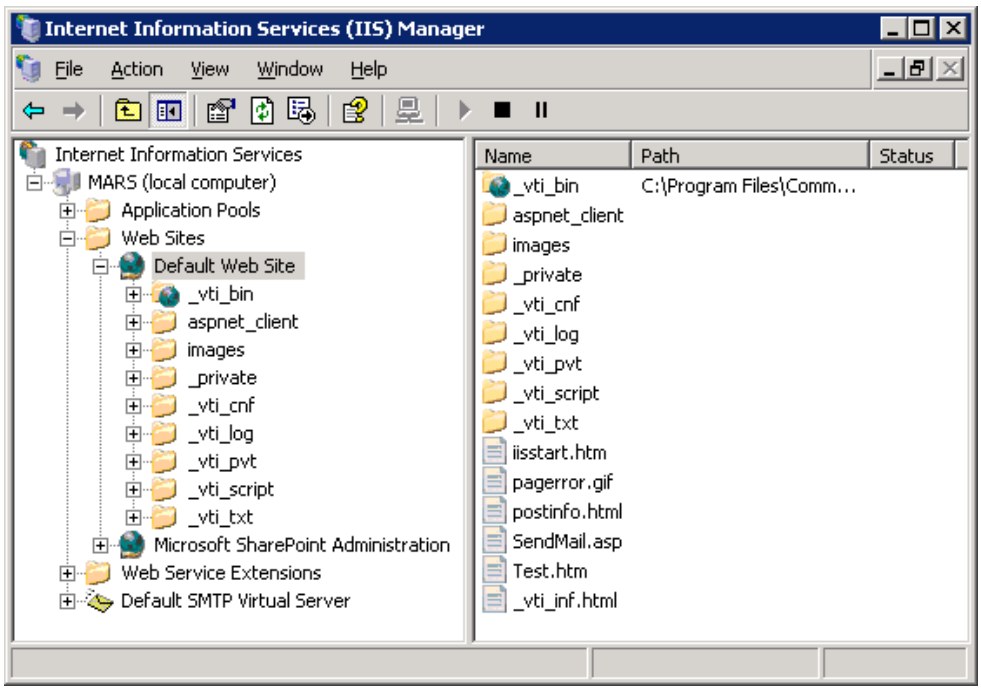
6. Repeat step 5 until a directory has been created for each Location that will be using the web interface with SARS·GRID.

45.1.3 Create a Virtual Directory

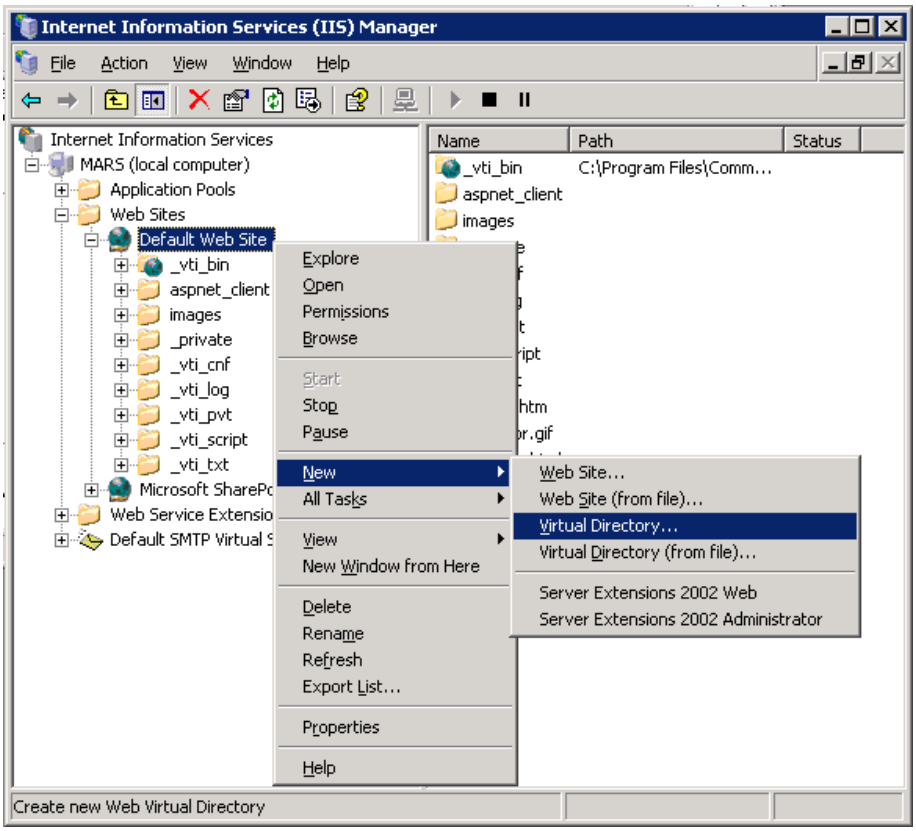
1. From the CONTROL PANEL, select ADMINISTRATIVE TOOLS and find Internet Information Services (IIS) Manager.



2. Double click on INTERNET INFORMATION SERVICES (IIS) MANAGER to open the Internet Information Services (IIS) Manager screen. Here is an example.

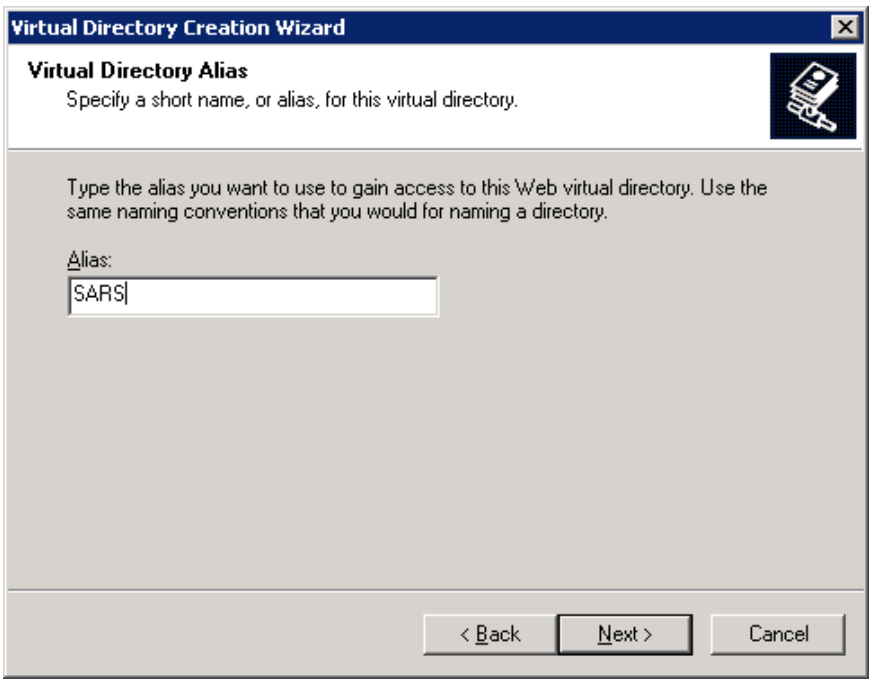


3. Right click on DEFAULT WEB SITE, select NEW, and then select VIRTUAL DIRECTORY as shown in the example below.



4. The following VIRTUAL DIRECTORY CREATION WIZARD screen will be is displayed.

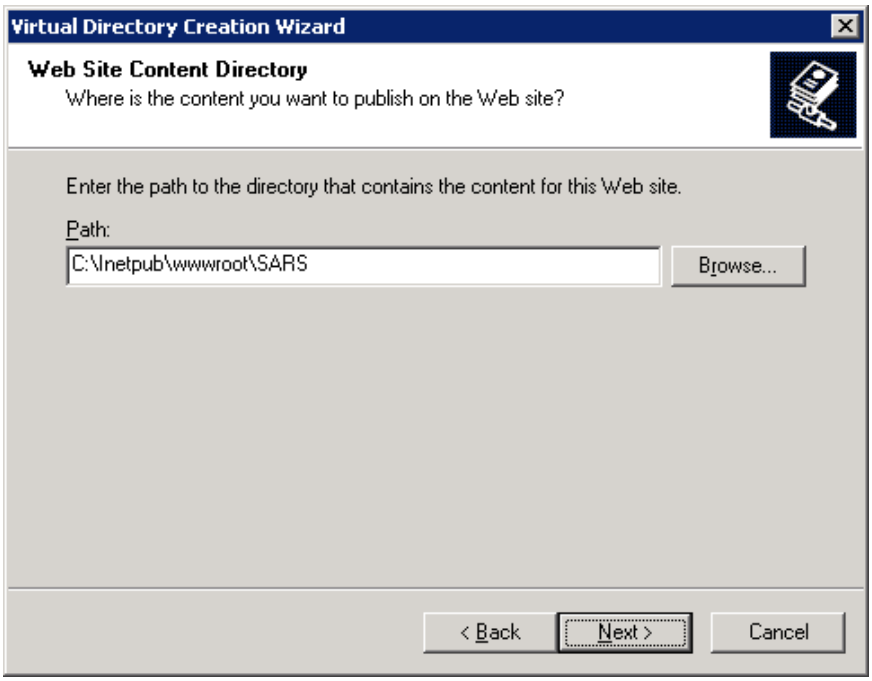
5. Click on NEXT to display the VIRTUAL DIRECTORY ALIAS screen. Here is an example:



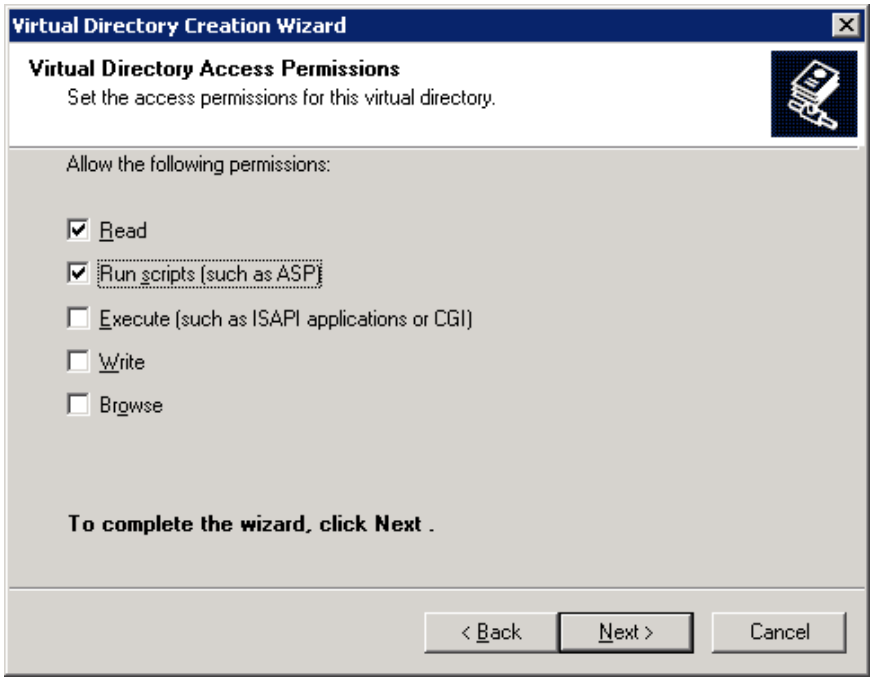
6. In the ALIAS field, type in the word SARS.

7. Click on NEXT to display the WEB SITE CONTENT DIRECTORY screen.

8. Select the Path to the directory that contains the content for the web site. Here is an example:



9. Click on NEXT to display the VIRTUAL DIRECTORY ACCESS PERMISSIONS screen. Here is an example:



a. Click on READ.

b. Click on RUN SCRIPTS (SUCH AS ASP).

10. Click on NEXT to display the last screen of the wizard. It looks like this:

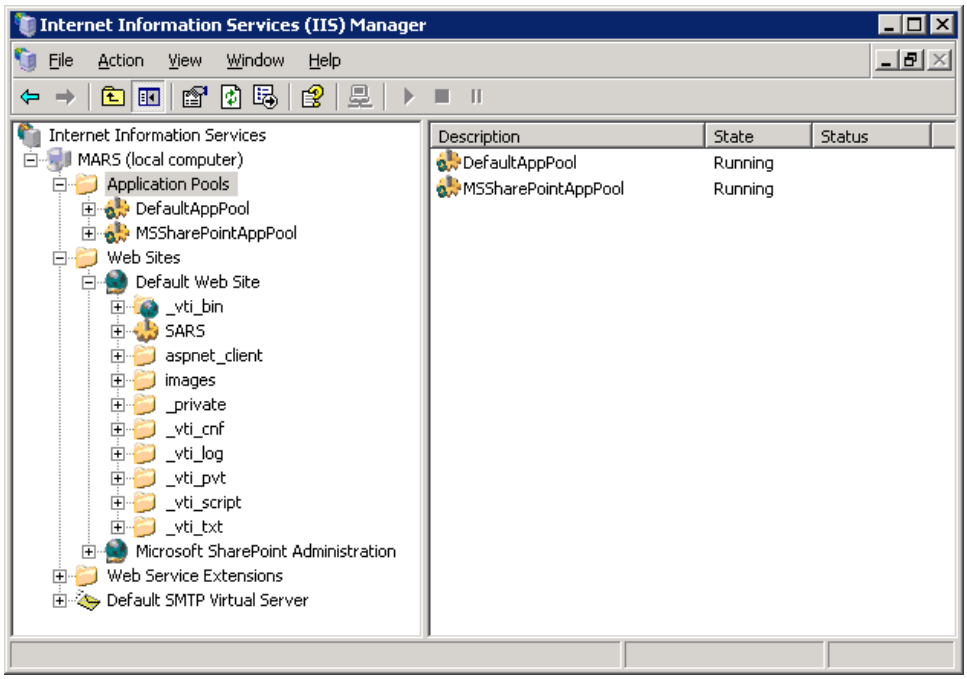
11. Click on FINISH.

The remaining steps will be dependent upon whether the application is being installed on a Windows 2000 server or a Windows 2003 server that has been upgraded from a Windows 2000 server (go to step 12), or whether the application is being installed on a cleanly installed Windows 2003 server (go to step 13).

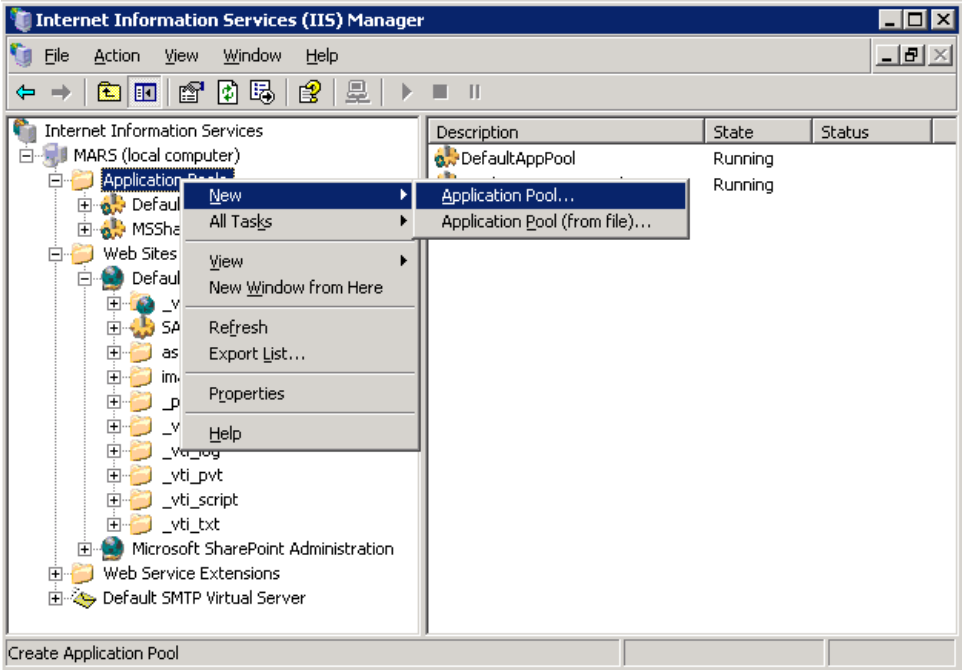
12. For Windows 2000 servers or Windows 2003 servers that have been upgraded from Windows 2000 servers, in the e·SARS PROPERTIES screen, set the APPLICATION PROTECTION value to HIGH (ISOLATED).

13. For cleanly installed Windows 2003 servers, follow the steps below:

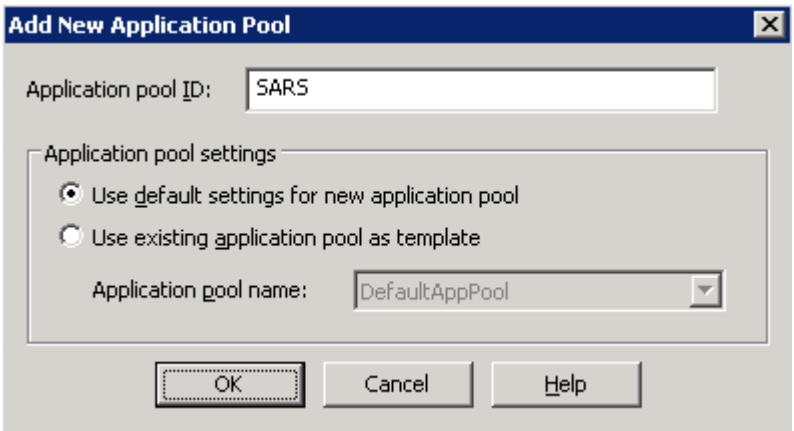
    a. From the INTERNET INFORMATION SERVICES (IIS) MANAGER screen, click on APPLICATION POOLS to create a new application pool. Here is an example of the screen:



    b. Right click on APPLICATION POOLS, select NEW, and then select APPLICATION POOL, as shown below:



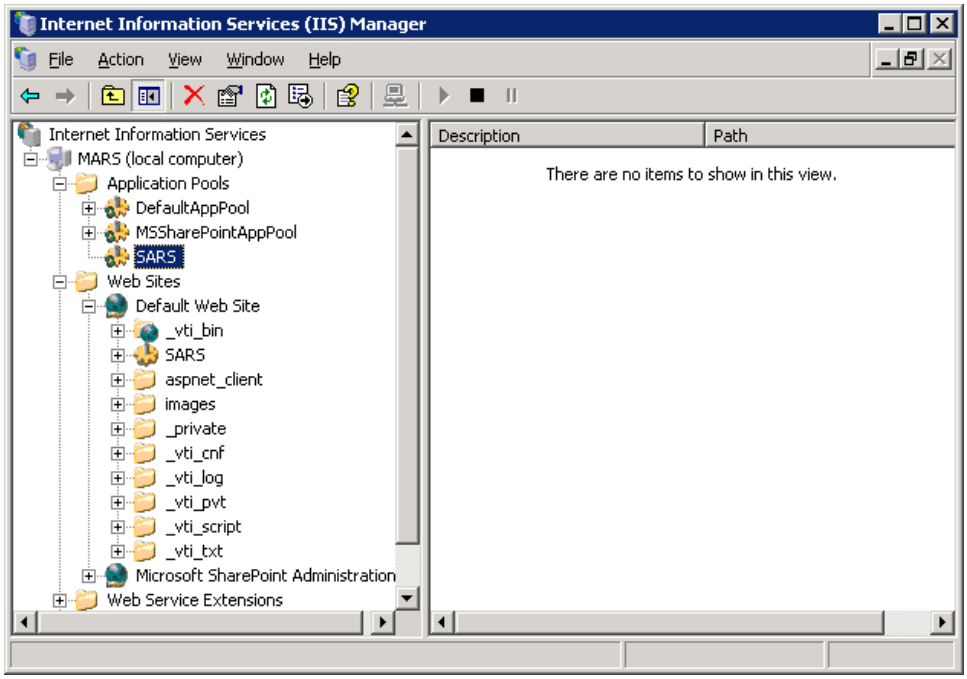
c. An ADD NEW APPLICATION POOL screen will be displayed. Here is an example:



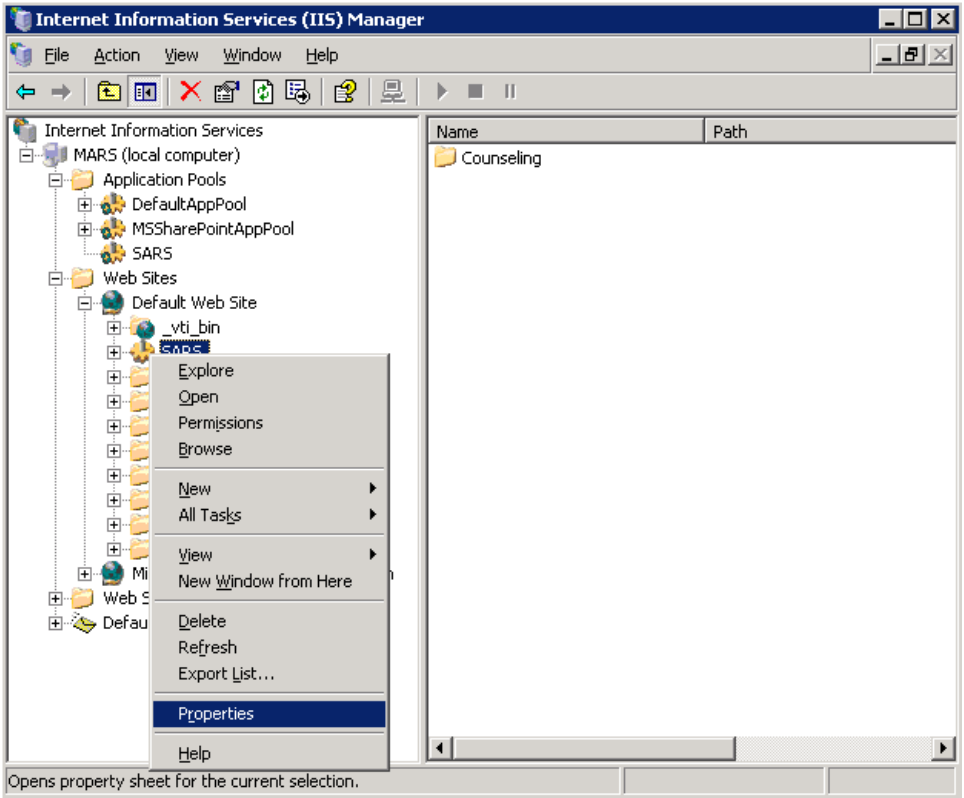
i) In Application pool ID, type in the name of the new application pool.

ii) Click on USE DEFAULT SETTINGS FOR NEW APPLICATION POOL.

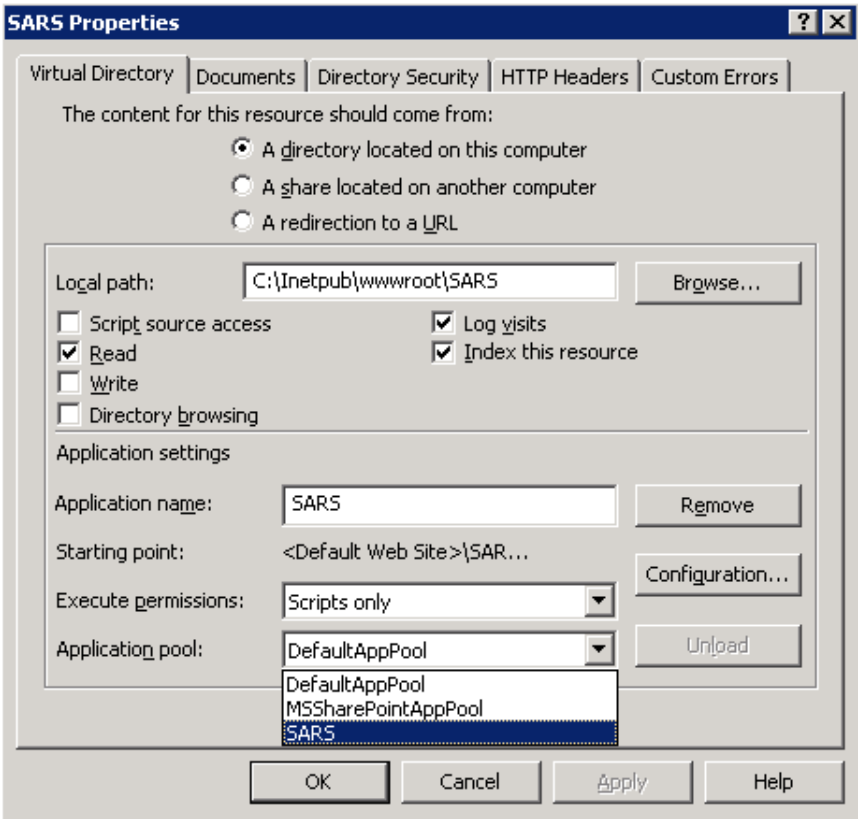
iii) Click on OK. You will be returned to the IIS Manager screen, which should display the newly-created application pool. Here is an example:



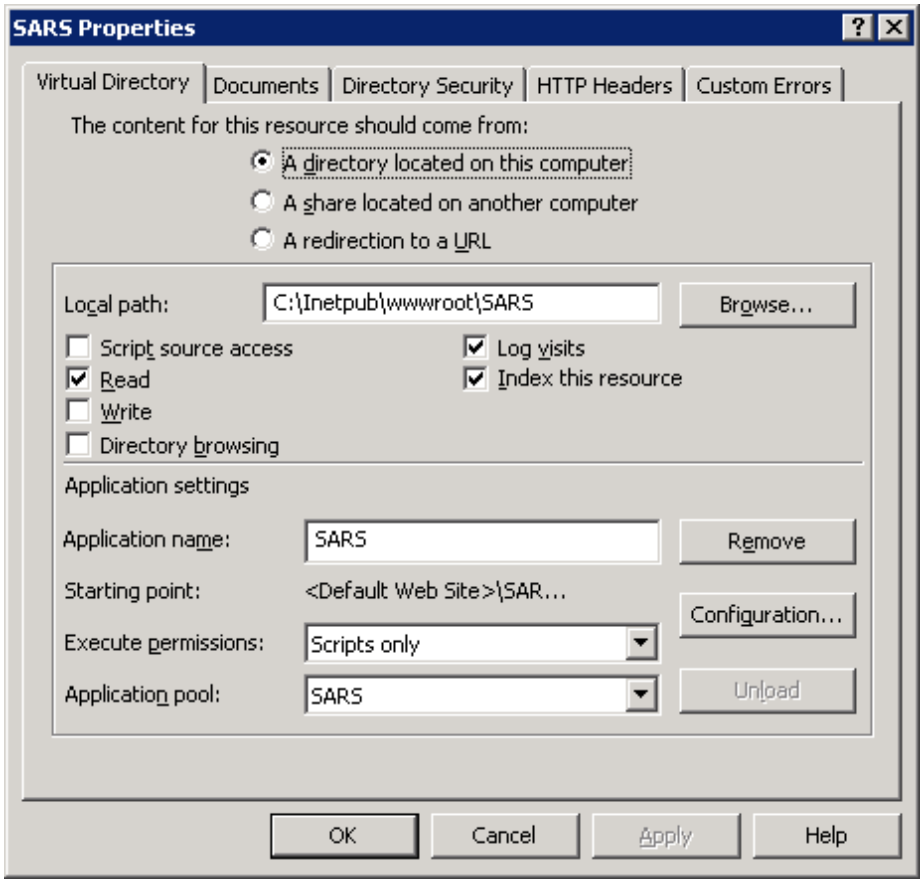
d. Right click on the SARS virtual directory under the WEB SITES folder and select PROPERTIES, as shown below:



e. A SARS PROPERTIES screen will be displayed. Here is an example:



i) In APPLICATION POOL, select the newly created application pool. The PROPERTIES screen should look like this:

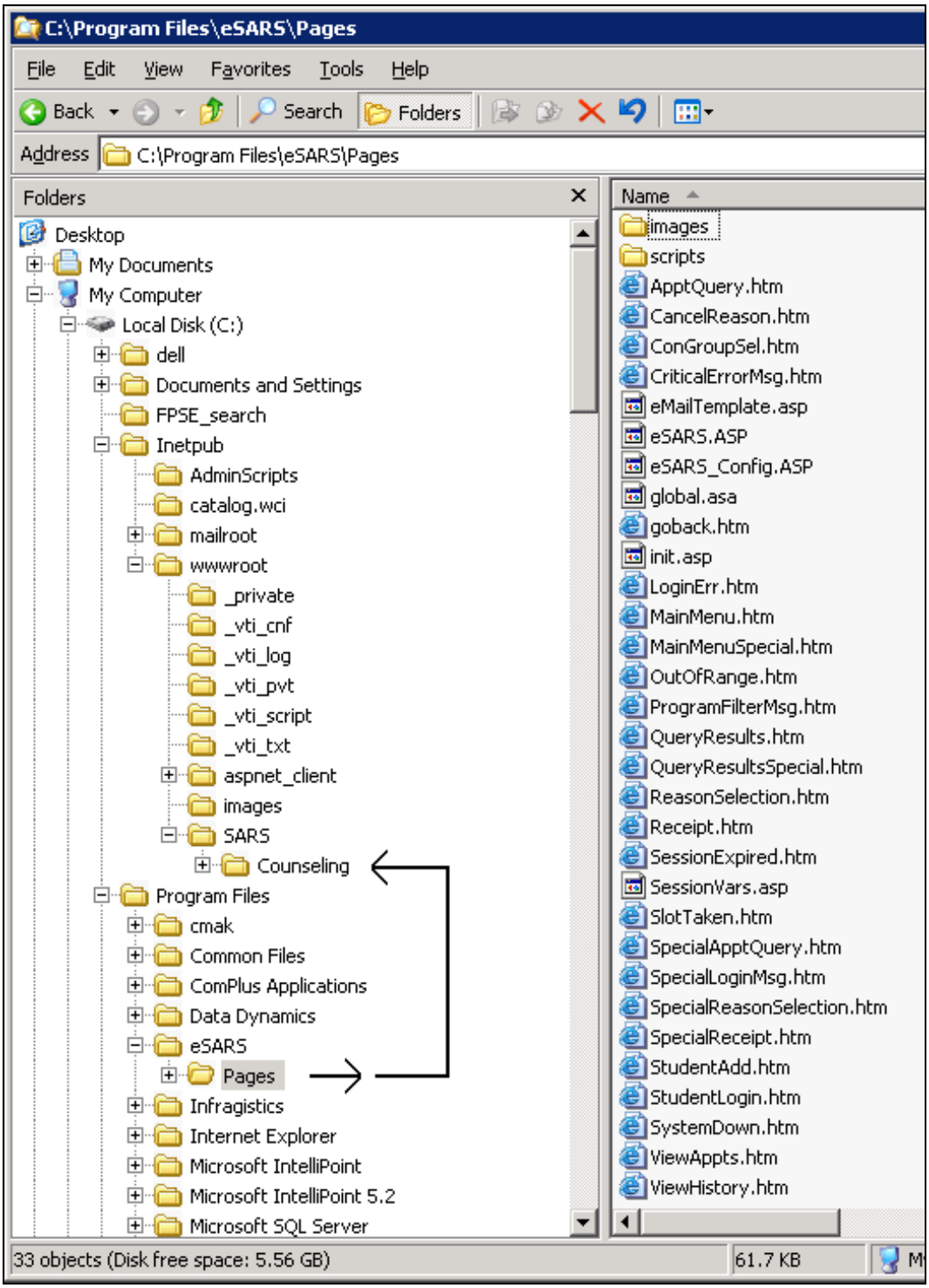


ii) Click on OK.

The Virtual Directory installation is now complete.

45.1.4 Copy Contents of the Pages Directory into each Department Directory

1. From C:\Program Files\eSARS, click on PAGES.



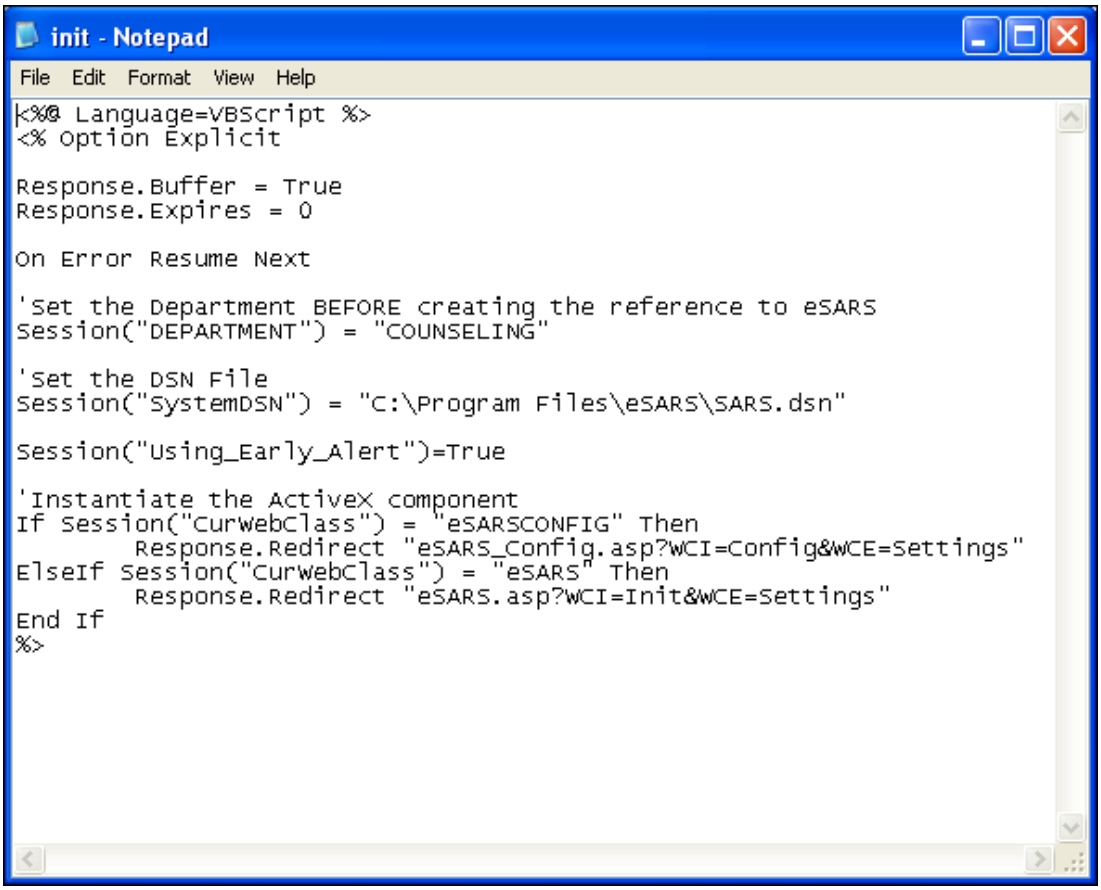
2. Copy (do not move) all of the Pages file contents to the directory for each Location created under the SARS directory, as shown above.

3. Repeat step 2, above, for each directory containing a Location under the SARS directory.

4. When done, click on **X** to close the screen.

45.1.5 Edit the Init.asp

1. In the directory that has been created for each department, open the Init.asp file in Notepad. It may look like this:




```
<%@ Language=VBScript %>
<% Option Explicit

Response.Buffer = True
Response.Expires = 0

On Error Resume Next

'Set the Department BEFORE creating the reference to eSARS
Session("DEPARTMENT") = "COUNSELING"

'Set the DSN File
Session("SystemDSN") = "C:\Program Files\eSARS\SARS.dsn"

Session("Using_Early_Alert")=True

'Instantiate the ActiveX component
If Session("CurWebClass") = "eSARSCONFIG" Then
        Response.Redirect "eSARS_Config.asp?WCI=Config&WCE=Settings"
ElseIf Session("CurWebClass") = "eSARS" Then
        Response.Redirect "eSARS.asp?WCI=Init&WCE=Settings"
End If
%>
```

2. Edit the Department setting to specify the name of the department. This should be a one-word string without spaces if possible.

3. Edit the SystemDSN setting to specify the File DSN for the SARS·GRID database. Use UNC paths rather than mapped drives if the DSN is located on a different server.

4. [optional] If you wish to use an international date format for birth dates, edit the SessionDOB setting to specify the format for date of birth, as follows:

   ‘Session(“DOB_Format”)=”dd/mm/yyyy”

5. When done, save and then click on X to close the Notepad.

45.1.6 Prepare to Set up the Configuration Screen

After the Information Technology specialist has installed the web interface and created departmental directories, the system administrator will want to set up the Configuration screen for each Location. SARS conducts a one-hour decision tree session with a manager from one work unit and college Information Technology specialists to make decisions on set up options. Thereafter, IT may conduct subsequent sessions as needed. Note that the college is

responsible for branding its web pages. Before starting this process, it is recommended that the system administrator prepare by reviewing the decision chart below.

The following pages may be photocopied and used as a worksheet.

SETTINGS REQUIRING YOUR DECISION	YOUR ACTION ITEM
SYSTEM DSN	[No action required.]
DEFAULT LOCATION The web interface will default to a designated Location, after which another Location may be selected.	Which Location should be displayed in the location field as the initial default? _____
DAYS AVAILABLE An option exists to limit the number of days (in advance of "today") for which students will be allowed to make appointments.	How may days (from today) should be made available for scheduling? _____
SCHEDULE CODE Select the appointment-allowable schedule code(s) to be used by the web interface when searching for an available appointment.	Create an e·SARS Schedule Code Group in SARS·UTIL. Assign all Schedule Codes that may be used in e·SARS to that group. Indicate whether the Schedule Code should be displayed on the Query Results page. ☐ Show on Query Results page. Name the Schedule Code Group:_____ List the schedule codes to be included: ---------- ---------- ---------- ---------- ----------

SETTINGS REQUIRING YOUR DECISION	YOUR ACTION ITEM
ODBC STUDENT LOOKUP Select to use real time lookup when making appointments.	
AVAILABLE APPOINTMENT QUERY RETURN An option exists to limit the number of available appointments fitting the selected criteria that will be displayed when a student is making an appointment.	
MAXIMUM APPOINTMENTS PER STUDENT An option exists to limit the number of *pending* appointments that a student may schedule.	What is the maximum number of appointments that a student may schedule? _____ Should this maximum apply to all Locations? If so, check: ☐ Include Appointments for All Locations.
SCHEDULED APPOINTMENT QUERY RETURN An option exists to limit the number of pending appointments that will be displayed. (This number cannot exceed the number used in MAXIMUM APPOINTMENTS PER STUDENT.)	What is the maximum number of pending appointments that should be displayed on the Pending Appointments list? *(cannot exceed maximum appts. per student)* **<u>10 per page</u>** [Use this default. Skip to next item.]
STUDENT HISTORY QUERY RETURN An option exists to limit the number of appointments listed in a student's history that will be displayed.	What is the maximum number of appointments that should be displayed on the Appointment History list? **<u>50 per page</u>** [Use this default. Skip to next item.] Should SARS·TRAK data be excluded? If so, check: ☑ **Ignore SARS·TRAK data.** [Use default]

SETTINGS REQUIRING YOUR DECISION	YOUR ACTION ITEM
TIMEOUT If a student does not complete a transaction within the designated time, the web interface will log the student off without committing the appointment. Give the student sufficient time to complete the process. Otherwise, you will prematurely log a student off while the student is taking the action.	Enter the number of seconds after which inactivity on the website will automatically log out the student user. **10 minutes or 600 seconds** [Use this default. Skip to next item.]
TRANSACTION LOG FILE This file is used for data recovery when necessary. The default file name is TRANSLOG.TXT.	Do you wish to change the name of the Transaction Log File? ☐ Yes ☑ **No** [Use **TRANSLOG.TXT** Skip to next item.] If Yes, what will be the name of the file? _____
PRINT RECEIPT An option exists to allow the student to print appointment receipts.	Do you wish to enable the receipt printing option? ☐ Yes ☐ No
EMAIL RECEIPT An option exists to send an e-mail reminder to the student after an appointment has been booked. If this option is selected, you may choose whether to have the e-mail message sent in HTML or Plain Text format. You will also need to create the format for the message.	Should an e-mail receipt be sent to the student after an appointment has been booked? ☐ Yes ☐ No If so, which format do you want to use? ☐ HTML ☐ Plain Text NOTE: Be sure to click on Edit E-mail Template and complete as desired.

SETTINGS REQUIRING YOUR DECISION	YOUR ACTION ITEM
LOG-IN ID FORMAT An option exists to select the Student ID format to be used when students log-in to the web interface. In addition, another option, if selected, allows the student to toggle to other existing ID formats.	Which student ID format should be used: _____ Should students be allowed to toggle to enter alternate Student ID formats? ☐ Yes ☐ No
LOGIN BIRTH DATE FORMAT An option exists to select the format for student birth dates.	Which birth date format do you want to use for the web interface? _____
USE PIN NUMBER An option exists to use a PIN number in addition to a birth date as part of the sign-in authentication process.	Do you wish to use this option? ☐ Yes ☐ No NOTE: PIN numbers must be able to be imported into SARS.
ALLOW NEW STUDENT ADD An option exists to permit a new student to be added from the web connection.	Do you wish to use this option? ☐ Yes ☑ **No** [Use this default. Skip to next item.] (**No is recommended**)
LIMIT DATES An option exists to limit the time frame during which students may use the web interface to make appointments. For example, you may wish to allow students to use the web interface only during the first three weeks of the semester. If you are not limiting usage, then there is no need to specify the date range.	Do you wish to use this option? ☐ Yes ☐ No If yes, what is the earliest date for which students will be permitted to make appointments? Start Date: _ _ _ _ _ _ _ _

SETTINGS REQUIRING YOUR DECISION	YOUR ACTION ITEM
	What is the furthest date out for which students will be permitted to make appointments: Stop Date: _ _ _ _ _ _ _ _
ALLOW CANCELLATION An option exists to allow students to cancel an appointment.	Do you wish to use this option? ☐ Yes ☐ No If Yes, check the box below if you wish to limit cancellations to only those that may be made in e·SARS. ☐ Limit to Configured Schedule Codes
SHOW COMMENTS ON HISTORY An option exists to have the system display comments on the Student History screen.	Do you wish to use this option? ☐ Yes ☑ **No** [Use this default. Skip to next item.] (**No is recommended**)
FILTER STUDENTS An option exists to prohibit selected students from taking an action using the web interface. For example, you may determine that students who are on probation or who are repeated "no shows" should not be allowed to schedule appointments through the web interface.	Do you wish to use this option? ☐ Yes ☐ No If yes, what Additional Info Question will you create in SARS·GRID UTIL to be used as the filter: _____
LIMIT TO PROGRAM An option exists to allow certain students to use the web interface for certain designated programs (e.g. TRIO). If selected, an Additional Information Question must be created to use as the filter. Any student with a YES value for this question will be allowed to sign into the web interface.	Do you wish to use this option? ☐ Yes ☐ No If yes, what Additional Info Question will you create in SARS·GRID UTIL to be used as the filter: _____

SETTINGS REQUIRING YOUR DECISION	YOUR ACTION ITEM
LIMIT TIME An option exists to only allow students to schedule appointments a specified number of hours in advance. Then, in HOURS enter a number of hours.	Do you wish to use this option? ☐ Yes ☐ No If yes, what is the maximum number of hours in advance of an appointment time that a student will be allowed to book an appointment? _____ If you wish to disregard weekends, check this box: ☐ Ignore Weekends
USE CLASSES An option exists to use classes as Reason Codes. (USE CLASSES must also have been selected in SARS·UTIL and student class data must already be imported.)	Do you wish to use this option? ☐ Yes ☐ No If yes, has the USE CLASSES option been selected in SARS·UTIL and has student class data already been imported? ☐ Yes ☐ No Do you want to link classes to Specialty Groups? ☐ Yes ☐ No Specify the desired Default Specialty Group: _____
SHORT NAME FILTER An option exists to display only those advisors who are currently available for appointments during the specified time period.	Do you wish to use this option? ☐ Yes ☐ No
USE SPECIALTY GROUPS An option exists to allow students to select from a specialty group when making an appointment (e.g., Spanish-speakers).	Do you wish to use this option? ☐ Yes ☐ No

SETTINGS REQUIRING YOUR DECISION	YOUR ACTION ITEM
REQUIRE APPOINTMENT REASON An option exists to force the student to enter a reason when booking an appointment. If this option is selected, a Reason Code Group that was created in SARS·GRID must also be selected. This will link all reasons for booking an appointment. If Reason Codes are to be used, remember to go to SARS·UTIL and select durations under the Reason Codes Tab for each Reason Code that will be made available to the student when making appointments.	Do you wish to use this option? ☐ Yes ☐ No Regardless of the Yes/No selection above, create an e·SARS Reason Code Group in SARS·UTIL Assign all Reason Codes that may be used in e·SARS to that group. Name the Reason Code Group:_____ List the reason codes to be included: _____ _____ _____ _____ Do you wish to display only those advisors who are associated with a selected Reason Code? If Yes, check this box: ☐ Link to Short Name
REQUIRE CANCELLATION REASON An option exists to force the student to enter a reason when canceling an appointment. If this option is selected, a Reason Code Group that was created in SARS·GRID must also be selected. This will link all reasons for canceling an appointment.	Disregard unless you wish to use this option. If yes, list the Reason Code Group: _____
SELECT REASON CODE FIRST An option exists to force the student to select a Reason Code before selecting other appointment criteria. This option must be selected if the Link to Short Name option and the Show Appt. Duration on Query Results options are selected.	Do you wish to use this option? ☐ Yes ☐ No If Yes, go back to REQUIRE APPOINTMENT REASON and be sure that Link to Short Name is checked.

SETTINGS REQUIRING YOUR DECISION	YOUR ACTION ITEM
SHOW APPT. DURATION ON QUERY RESULTS An option exists to display the length of the appointment on the selection screen.	Do you wish to use this option? ☐ Yes ☐ No If Yes, go back to SELECT REASON CODE FIRST and make sure that it is checked.
REQUIRE PHONE NUMBER An option exists to require that a phone number be entered before a student can book an appointment.	Do you wish to use this option? ☐ Yes ☐ No
REQUIRE EMAIL ADDRESS An option exists to require students to enter an email address so that an email receipt may be sent.	Do you wish to use this option? ☐ Yes ☐ No NOTE: Yes is required if EMAIL RECEIPT is checked.
REQUIRE EMAIL ADDRESS OR PHONE NUMBER An option exists to require students to enter at least an email address or a phone number.	Do you wish to use this option? ☐ Yes ☐ No
SEND E-MAIL ERROR NOTIFICATION An option exists to send e-mail notifications to SARS Software Products, Inc. in the event of problems occurring with the web interface.	Do you wish to use this option? ☐ Yes ☐ No If yes, in FROM, enter an email address (does not have to be a live mailbox) that will help us to determine the school the error report is from:

APPOINTMENT TYPE An option exists to identify whether individual or group appointments or both may be booked using the web interface.	What type of appointments may a student schedule using the web interface? ☐ All Appointment-Allowable Schedule Codes ☐ All Single Student Appointment Codes ☐ All Group Appointment Codes

45.1.7 Set up the e·SARS Configuration Screen

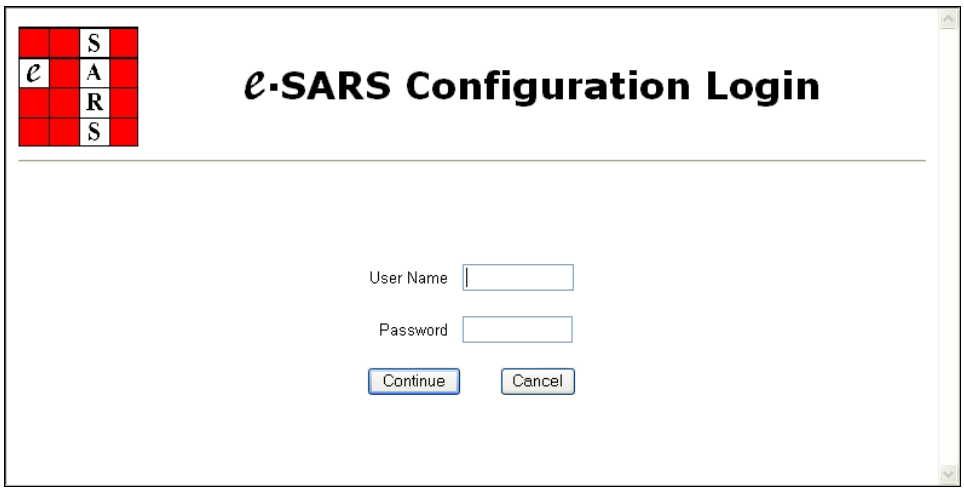
Once the worksheet has been completed, follow the steps below for each Location that will be using the web interface.

1. Open up the web browser.

2. Type in the URL to access the CONFIGURATION SCREEN.

   Example: http://nbcc.edu/sars/advising/esars_config.asp.

   A Login screen will be displayed that looks like this:

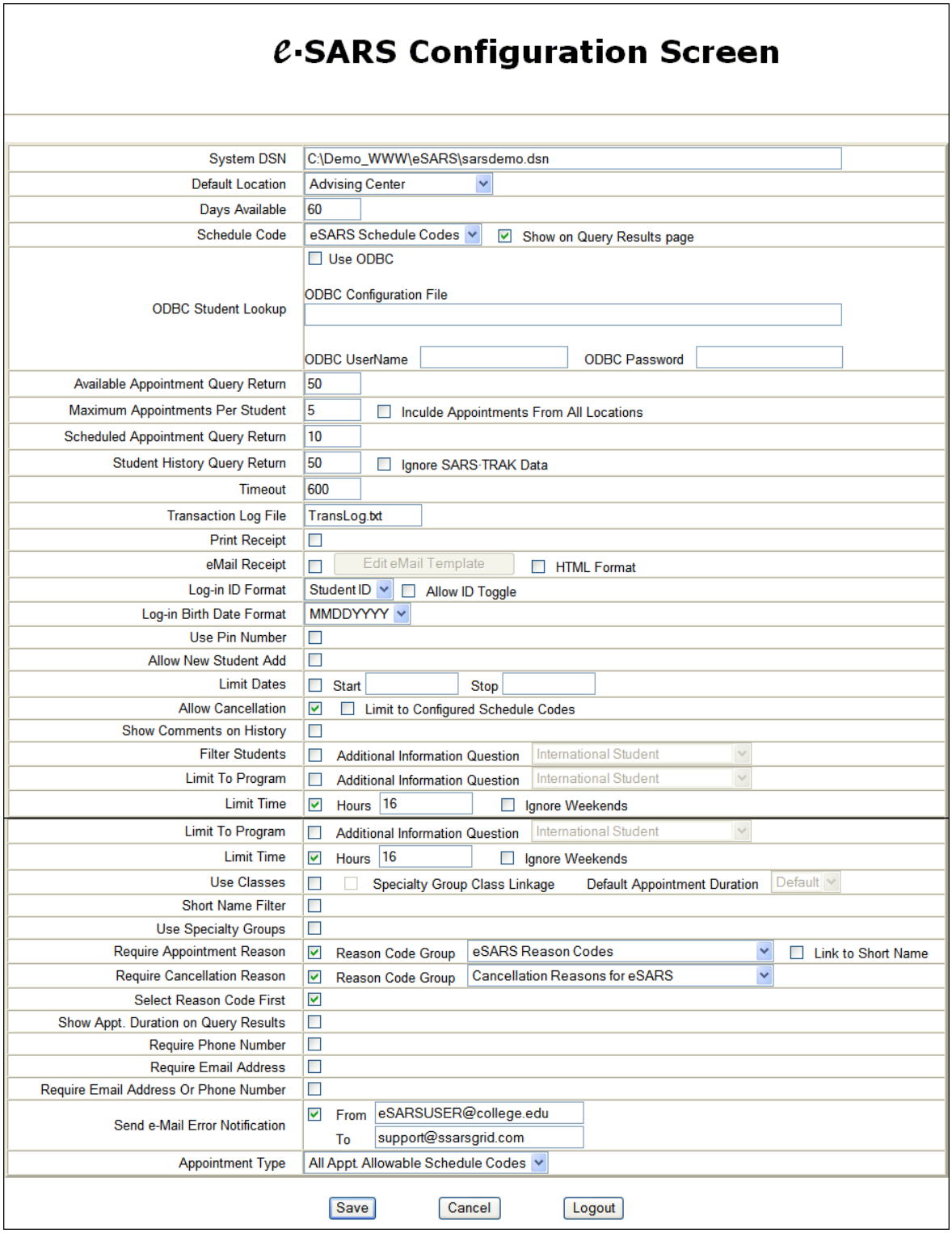


3. Enter your USER NAME and your PASSWORD.

   Note: Only those users who have been assigned User Name Maintenance access rights in SARS·GRID will be able to successfully log on to the Configuration Screen.

4. Click on CONTINUE to display the e·SARS Configuration Screen.

Here is an example.



5. In each field on the Configuration Screen, select or type in the settings to be used, as follows:

   a. In DEFAULT LOCATION, select the location that will be displayed in the location field as the initial default.

   b. In DAYS AVAILABLE, enter the number of days (from today) that will be available for scheduling (e.g., 10).

   c. Click on SAVE. The remaining steps may be configured either by the information technology staff or (preferably) by the system administrator for each Location.

   d. In SCHEDULE CODE,

      i) Select the Schedule Code Group that was created in SARS·GRID to link all schedule codes to be made available for booking an appointment. Only those groups that have been created in SARS·UTIL will be displayed.

      ii) Click on SHOW ON QUERY RESULTS PAGE if the Schedule Code should be displayed when students are selecting an appointment.

   e. In ODBC STUDENT LOOKUP,

      i). Click on USE ODBC to enable the option to allow real time access to your college's student database while making appointments.

      ii) Click on the field under ODBC CONFIGURATION FILE and type in the name of the file that contains the information about the database file.

      iii) Click on the field adjacent to ODBC USERNAME and type in the user identification to gain access to the college's host student database.

      iv) Click on the field adjacent to ODBC PASSWORD and type in the password of the user to gain access to the college's host student database.

   f. In AVAILABLE APPOINTMENT QUERY RETURN, enter the maximum number of appointment options to be displayed in response to a student's query.

   g. In MAXIMUM APPOINTMENTS PER STUDENT,

      i) Enter the maximum number of pending appointments that a student may schedule.

      ii) If desired, click on the INCLUDE APPOINTMENTS FOR ALL LOCATIONS checkbox to make the maximum appointments per student applicable to all Locations.

   h. In SCHEDULED APPOINTMENT QUERY RETURN, enter the maximum number of scheduled appointments to be displayed when a student views pending appointments. This number cannot exceed the number used in MAXIMUM APPOINTMENTS PER STUDENT.

   i. In STUDENT HISTORY QUERY RETURN,

      i) Enter the maximum number of appointments to be displayed on the Appointment History list.

      ii) Click on the IGNORE SARS·TRAK DATA checkbox to disregard that information.

j. In TIMEOUT, enter the number of seconds after which inactivity on the website will automatically log out the student user.

k. In TRANSACTION LOG FILE, enter the name of the file in which backup data will be stored. This file will be used for data recovery when necessary. The default file name is TRANSLOG.TXT.

l. (If desired) In PRINT RECEIPT, click on checkbox to print a receipt.

m. (If desired) In EMAIL RECEIPT,

i) Click on the checkbox to email an appointment receipt when an appointment is booked, or leave it unchecked, as desired.

ii) Click on HTML FORMAT to send the email in HTML format rather than plain text.

iii) Click on EDIT EMAIL TEMPLATE and then create the format for the email message as shown in the example below:

The options are:

- ADDRESS SETTINGS

  FROM NAME: Use to enter the name of the entity that will be sending the email messages (e.g., NBCC Counseling).

FROM ADDRESS: Use to enter the email address of the sender (e.g., counseling@nbcc.edu).

REPLY ADDRESS: Use to enter the email address to which replies will be sent (e.g., Counseling@NorthBay.edu).

- EMAIL SETTINGS

SUBJECT: Use to enter a subject line for these emails (e,g., Appointment Receipt).

COUNSELOR: Use during the composition of the email message to have the system automatically insert the name of the counselor or advisor with whom the student has the appointment in the body of the message.

DATE: Use during the composition of the email message to have the system automatically insert the date of the appointment in the body of the message.

TIME: Use during the composition of the email message to have the system automatically insert the time of the appointment in the body of the message.

DURATION: Use to have the system automatically insert the duration of the appointment in the body of the message.

ROOM: Use during the composition of the email message to have the system automatically insert the advisor's room number in the body of the message.

- SAVE: Use to save the current message.
- CANCEL: Use to exit the screen.

(a) Click on the FROM NAME field and type in the name of the sender.

Note
In the From Name field, type in the name as it will appear to the student who receives it (e.g., *NBCC Counseling Office*). After that, enter the actual email address of the sending entity, enclosed in brackets < > (e.g., *<counseling@nbcc.edu>*). The maximum number of characters for this field is 50. Here is a complete example of the From Name: ***NBCC Counseling Office <counseling@nbcc.edu>***

(b) Click on the FROM ADDRESS field and type in the email address of the sender.

(c) Click on the REPLY ADDRESS field and type in the email address to which replies will be sent.

(d) Click on the SUBJECT field and type in a subject title that will be displayed as the subject line in these email messages.

(e) Click on the empty field and begin typing the desired message.

(i.) To have the system automatically insert the counselor or advisor's name, position the cursor at that point and then click on COUNSELOR. A placeholder will be inserted; it looks like this: |COUNSELOR|.

EXAMPLE: . . . with |COUNSELOR| . . .

(ii.) To have the system automatically insert the date of the appointment, position the cursor at that point and then click on DATE. A placeholder will be inserted; it looks like this: |DATE|.

EXAMPLE: You have an appointment on |DATE| . . .

(iii.) To have the system automatically insert the time of the appointment, position the cursor at that point and then click on TIME. A placeholder will be inserted; it looks like this: |TIME|.

EXAMPLE: . . . at |TIME| . . .

(iv.) To have the system automatically insert the duration of the appointment, position the cursor at that point and then click on DURATION. A placeholder will be inserted; it looks like this: |DURATION|.

EXAMPLE: The appointment is scheduled for |DURATION|.

(v.) To have the system automatically insert the room number of the appointment, position the cursor at that point and then click on ROOM. A placeholder will be inserted; it looks like this: |ROOM|.

EXAMPLE: . . . in Room |ROOM|.

(f) Click on SAVE.

n. In LOG-IN ID FORMAT,

i) Select the format of the student's identifying number.

ii) Click on ALLOW ID TOGGLE if the user will be permitted to toggle between different ID formats.

o. In LOG-IN BIRTH DATE FORMAT, select the format of the student's birth date (e.g. MMDDYYYY).

p. In USE PIN NUMBER, click on the checkbox to require that the student enter a PIN number in lieu of a birth date as part of the sign-in authentication procedure. If this option is checked, student PIN numbers must be able to be imported into SARS.

q. (If desired) In ALLOW NEW STUDENT ADD, click on the checkbox to permit a new student to be added from the web connection. [It is recommended that this option be left unchecked.]

r. (If desired) In LIMIT DATES, click on checkbox to enable the option to limit the time frame in which students may make appointments. Then, in START, enter the earliest date for which a student will be permitted to make an appointment, and in STOP, enter the furthest date out for which a student will be permitted to make an appointment.

s. (If desired) In ALLOW CANCELLATION,

i) Click on checkbox to select the option to allow students to cancel their scheduled appointments.

ii) Click on the LIMIT TO CONFIGURED SCHEDULE CODES checkbox to allow students to cancel only those appointments that can be booked using e·SARS.

t. If desired, in SHOW COMMENTS ON HISTORY, click on the checkbox to have the system display comments on the Student History screen.

u. (If desired) In FILTER STUDENTS, click on checkbox to enable option to prevent certain students from using the web interface. Then, select an Additional Information Question to use as the filter. Any student with a YES value for this question will be prevented from signing into the web interface.

v. (If desired) In LIMIT TO PROGRAM, click on checkbox to enable option to prevent certain students from using the web interface. Then, select an Additional Information Question to use as the filter. Any student with a YES value for this question will be prevented from signing into the web interface for the selected program.

w. (If desired) In LIMIT TIME,

i) Click on checkbox to enable option to only allow students to schedule appointments a specified number of hours in advance.

ii) Click on the HOURS field and enter a number of hours.

iii) Click on the IGNORE WEEKENDS checkbox to have the system disregard any weekend days that may fall within the selected number of hours when searching for appointments.

x. (If desired) In USE CLASSES,

i) Click on the checkbox to include classes as Reason Codes.

ii) Click on SPECIALTY GROUP CLASS LINKAGE to link classes to specialty groups.

iii) Click on DEFAULT APPOINTMENT DURATION ▼ and select the default for classes.

Note: To use this option, USE CLASSES must also have been selected in SARS·UTIL and student class data classes must already be imported.

y. (If desired) In SHORT NAME FILTER, click on checkbox to activate the option to display only those advisors or counselors who are currently available for appointments during the specified time period.

z. (If desired) In USE SPECIALTY GROUPS, click on checkbox to allow students to select from a specialty group when making an appointment (e.g., Spanish-speakers).

aa. (If desired) In REQUIRE APPOINTMENT REASON,

i) Click on checkbox to force the student to enter a reason when making an appointment, or leave the checkbox unchecked to make it optional to select a reason.

ii) Then, in REASON CODE GROUP, select the Reason Code Group that was created in SARS·GRID to link all reasons for making an appointment. Only those groups that

have been created in SARS·UTIL will be displayed. (See SARS·GRID User Manual, Part II, Section 6.3.)

iii) Then, if desired, click on LINK TO SHORT NAME to display only those advisors who are associated with the Reason Code selected by the student (e.g., Financial Aid). If this option is selected, the SELECT REASON CODE FIRST option must also be checked (see step cc).

Note If Reason Codes are to be used, remember to go to SARS·UTIL and select durations under the Reason Codes Tab for each Reason Code that will be made available to the student when making appointments.

bb. (Disregard in most cases) In REQUIRE CANCELLATION REASON,

i) Click on checkbox to force the student to enter a reason when canceling an appointment, or leave the checkbox unchecked to make it optional to select a reason.

ii) Then, regardless of the Yes/No selection, in REASON CODE GROUP, select the Reason Code Group that was created in SARS·GRID to link all reasons for canceling an appointment. Only those groups that have been created in SARS·UTIL will be displayed. (See Part II, Section 5.3.)

cc. In SELECT REASON CODE FIRST, click on the checkbox to force the student to select a Reason Code before selecting any other appointment criteria. This option MUST be checked in order to use the LINK TO SHORT NAME option (see step aa, above) and to use SHOW APPT. DURATION ON QUERY RESULTS (see step dd, below).

dd. In SHOW APPT. DURATION ON QUERY RESULTS, click on the checkbox to show the student the length of the appointment on the selection screen.

ee. (If desired) In REQUIRE PHONE NUMBER, click on the checkbox to require that a phone number be entered for the purpose of making a confirmation call prior to the appointment date.

ff. [Required if EMAIL RECEIPT is checked] In REQUIRE EMAIL ADDRESS, click on the checkbox to require the student to enter an email address so that an email receipt may be sent.

gg. In REQUIRE EMAIL ADDRESS OR PHONE NUMBER, click on the checkbox to require the student to enter either an email address or a phone number for sending a receipt.

hh. In SEND E-MAIL ERROR NOTIFICATION,

i) Click on the checkbox to send email notifications to SARS Software Products, Inc. in the event of problems occurring with the web interface.

ii) Then, in FROM, enter an email address (does not have to be a live mailbox) that will help us to determine the school the error report is from. Example: NorthBayCollege@nbcc.edu.

iii) Verify the TO address is support@sarsgrid.com.

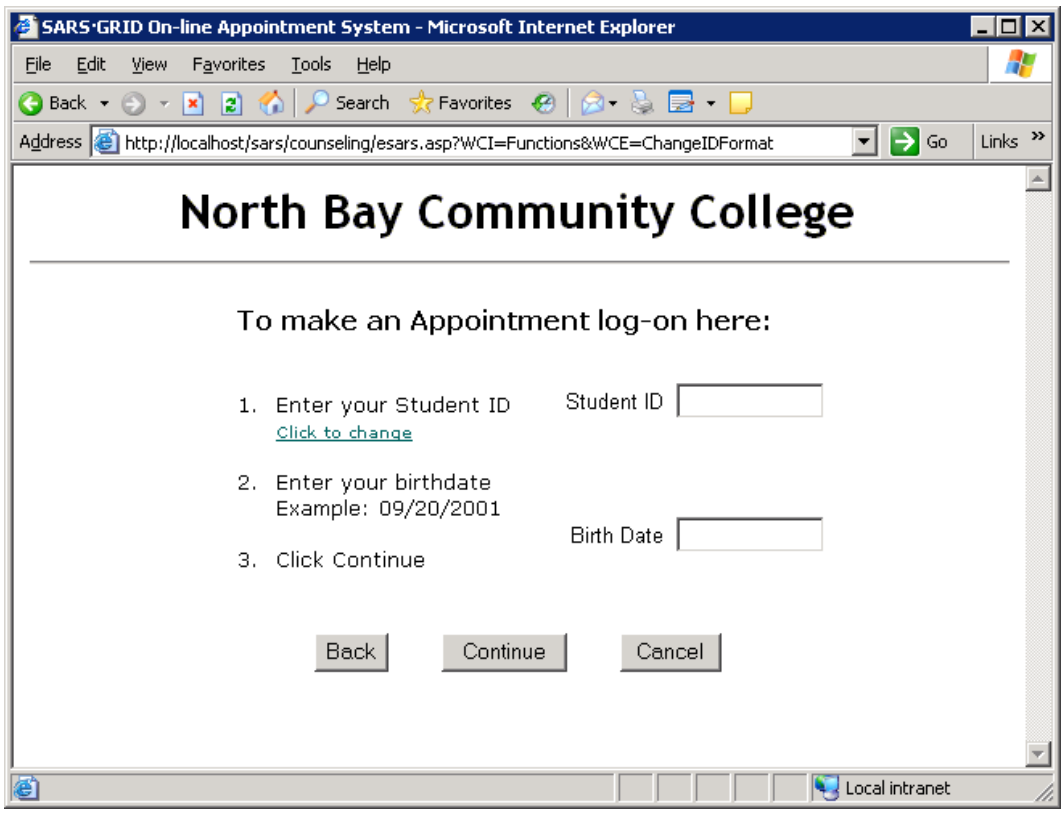
ii. In APPOINTMENT TYPE, select the schedule code type that will be used when searching for an available appointment. The choices include All Appt. Allowable Schedule Codes, All Single Student Appt. Codes & All Group Appt. Codes.

6. When done, click on SAVE.

7. Click on LOGOUT.

45.1.8 Test the System

1. Log on to the school's website (for example, http://nbcc.edu/esars/advising/esars.asp). The student log-on page will be displayed. Here is an example:



2. Enter a student's identifier in Student ID, or click on CLICK TO CHANGE to change the ID format and then enter the student's ID for that format.

3. Enter the student's birth date using the format provided.

4. Click on CONTINUE.

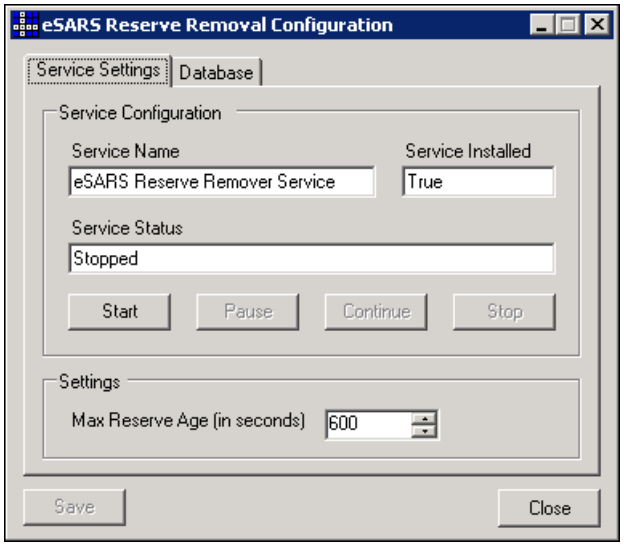
If no errors are received in this step, the web interface has been properly configured and is ready to have the web pages customized for your school.

45.1.9 Configure the eSARS Reserve Removal Utility

When a student begins to make an appointment using the web interface, the selected appointment slot displays RESERV (for an individual appointment) or the student's name is placed on the Roster (for a group appointment) to indicate to other users that the slot is in the process of being booked. If the student improperly terminates an e·SARS session, RESERV (in the case of an individual appointment) or the name on the Roster (in the case of a group appointment) will continue to be displayed for that slot until some action is taken to restore the slot to its original Schedule Code.

The e·SARS Reserve Removal Utility is a separate program that is used to remove such improperly reserved appointment slots after an established amount of time has elapsed. To work with this utility, follow the steps below.

1. Click on the e·SARS RESERVE REMOVAL UTILITY icon. A configuration screen will be displayed. Here is an example:



The screen will first be displayed with the SERVICE SETTINGS tab opened.

The options are:

- SERVICE CONFIGURATION:

SERVICE NAME:	Used to display the name of the service.
SERVICE INSTALLED:	Used to indicate whether the service is installed (True) or not installed (False).
SERVICE STATUS:	Used to display the current status of the service.
START:	Use to start the service.
PAUSE:	Use to pause the service.
CONTINUE:	Use to resume the service that has been paused.

STOP: Use to stop the service.

- SETTINGS:

  MAX RESERVE AGE (IN SECONDS): Use to establish the amount of time (in seconds) that will elapse before an improperly reserved individual appointment slot is restored to its original Schedule Code (or in the case of a group appointment, the student's name is removed from the Roster).

- SAVE: Use to store the selected settings.

- CLOSE: Use to exit the screen.

2. If no entry is displayed in the SERVICE NAME field, the program has not yet been installed. If it is installed properly, the name of the service will be displayed (e.g., eSARS Reserve Remover Service).

3. Note the SERVICE INSTALLED field. If it reads "TRUE," the service is already installed. If it reads "FALSE," the service needs to be installed first.

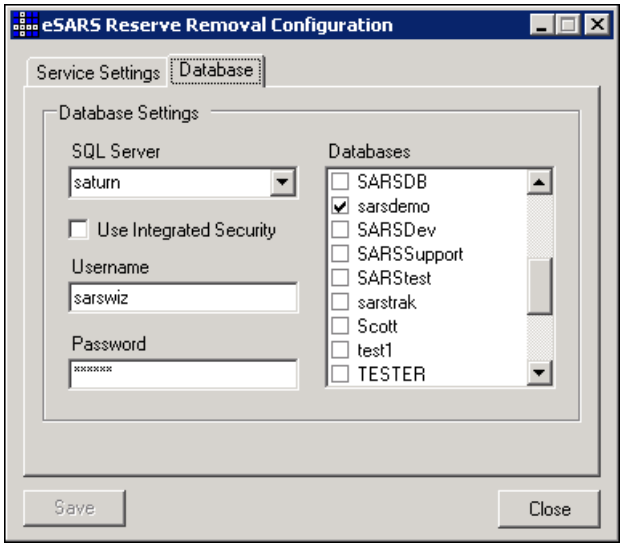
4. Note the status in the SERVICE STATUS field.

5. Click on MAX RESERVE AGE (IN SECONDS) and then type in or select the number of seconds that will be allowed to elapse before a reserve is removed from THE GRID. The recommended setting is 600 seconds, which is 10 minutes.

Note The setting in MAX RESERVE AGE (IN SECONDS) may not be less than the TIMEOUT value selected on the e·SARS CONFIGURATION screen. (See "Setting Up the e·SARS Configuration Screen" in Section 45.1.7 in this Part.)

6. Click on SAVE to store the selected settings.

7. Click on the DATABASE tab to open the Database options. Here is an example:



The options are:

- DATABASE SETTINGS:

SQL SERVER:	Use to select the server on which the SARS database is installed.
USE INTEGRATED SECURITY:	Use to allow the service to access the selected database(s) using the login under which the service is running. (No SQL user name or password will be required.)
USERNAME:	Use to enter the user name of the SQL user.
PASSWORD:	Use to enter the password for the SQL user.
DATABASES:	Use to select the database(s) that are to be affected by the e·SARS Reserve Removal settings.

- SAVE: Use to store the selected settings.
- CLOSE: Use to exit the screen.

8. Click on SQL SERVER ▼ and select the server on which the SARS databases reside.
9. To allow the service to gain access to the selected database(s) without requiring a SQL user to login, click on USE INTEGRATED SECURITY. This action will disable the USERNAME and PASSWORD fields.

   -or-

10. Leave USE INTEGRATED SECURITY unchecked; then,
    a. Click on the USERNAME field and type in the user name of the SQL user.
    b. Click on the PASSWORD field and type in the password of the SQL user.
11. In DATABASES, click on the checkbox adjacent to each database to which the e·SARS RESERVE REMOVAL program will be applicable.
12. Click on SAVE to store the settings.
13. Click on the SERVICE SETTINGS tab.
14. Click on START to initiate the program. The SERVICE STATUS field will display the word “Running” and the PAUSE and STOP buttons will be activated.
    a. To pause the service, click on PAUSE. The SERVICE STATUS field will display the 1word “Paused” and the CONTINUE and STOP buttons will be activated.
    b. To continue a service that has been paused, click on CONTINUE. The SERVICE STATUS field will display the word “Running” and the PAUSE and STOP buttons will be activated.
    c. To stop a service that is running, click on STOP. The SERVICE STATUS field will display the word “Stopped” and the START and STOP buttons will be activated.

1
15. Click on CLOSE to exit the screen.

45.2 Customize the *e*·SARS Web Interface

The primary method for gaining access to the web interface is through HTML pages and customized tags. This section provides an overview of the HTML Pages and other pages that, together, comprise the *e·SARS* web pages. It is expected that schools wishing to customize the product will do so with the assistance of an individual who is knowledgeable about web site design and editing. Therefore, this manual does not include a tutorial on web site editing or design.

The pages are described in this section so that the individual who will be customizing the application will be able to easily locate the areas where specific content may be edited.

45.2.1 Custom HTML Tags used by e·SARS.

There ar11e five HTML Tags available to access the e·SARS component:

- Button Tag
- Function Tag
- List Tag
- Script Tag
- Variable Tag

1. Button Tag

The following two buttons can be generated by using the button tag: MakeApptButton and ViewAppButton.

a. MakeApptButton

Description: Places a button at the position the tag is placed, which is either enabled or disabled based on the number of appointments a student has scheduled.

Parameters: Three ↓

- ButtonType — The type of button to place on the HTML page (Make appointment or View appointment).
- EnabledHTML — HTML code which defines the button in its enabled state.
- DisabledHTML — HTML code which defines the button in its disabled state.

Usage Syntax: **<WC@Other>MakeApptButton,<INPUT TYPE="submit" NAME="action" VALUE=" Make Appointment ">,<FONT COLOR="black" FACE="Times" SIZE="3"><CITE>The maximum number of appointments have been scheduled</CITE></FONT>

<IMG SRC="images/makeapp_dis.jpg"></WC@Other>**

b. ViewAppButton

Description: Places a button at the position the tag is placed, which is either enabled or disabled based on the number of appointments a student has scheduled.

Parameters: Three ↓

- ButtonType — The type of button to place on the HTML page (Make appointment or View appointment).
- EnabledHTML — HTML code, which defines the button in its enabled state.
- DisabledHTML — HTML code, which defines the button in its disabled state.

Usage Syntax: **<WC@Other>ViewAppButton,<INPUT TYPE="submit" NAME="action" VALUE="View or Cancel Appointments">,<FONT COLOR="black" FACE="Times" SIZE="3"><CITE>No appointments have been scheduled</CITE></FONT>

<IMG SRC="images/viewapp_dis.jpg"></WC@Other>**

2. Function Tag

The following three functions can be executed by using the function tag: ApptQuery, ViewAppts, and ViewHistory.

a. ApptQuery

Description: Places list of available appointments matching the specified search criteria.

Parameters: Two ↓

- FunctionName — The type of button to place on the HTML page.
- NoMatchHTML — HTML code, which defines a message to be displayed if no available appointments were found using the specified search criteria.

Usage Syntax: **<WC@Function>ApptQuery,<FONT COLOR="black" FACE="Arial" SIZE=2>No records matched the specified criteria.</FONT>,True</WC@Function>**

b. ViewAppts

Description: Places a Table listing the currently scheduled appointments for this student at the position the tag is placed.

Parameters: Three ↓

- FunctionName — The type of button to place on the HTML page.
- NoMatchMsg — Message to be displayed if no available appointments were found using the specified search criteria.
- BackButton — True or False value specifying whether a Go Back button will be placed at the bottom of the web page.

Usage Syntax: **<WC@Function>ViewAppts,No appointments scheduled at this time,True</WC@Function>**

c. ViewHistory

Description: Places a Table listing the *n* (this number is set by the system administrator) most recent appointments/cancellations for this student at the position the tag is placed.

Parameters: Two ↓

- FunctionName — The type of button to place on the HTML page
- NoMatchMsg — Message to be displayed if no history is available.

Usage Syntax: **<WC@Function>ViewHistory,No Student History found</WC@Function>**

3. List Tag

The following six types of lists can be generated by using the list tag: Counselor, CounselorGroup, Dow, Reason, ScheduleCode, and Time.

a. Counselor

Description: Places a list of counselors or advisors to allow students to choose the counselor or advisor they wish to see for their appointment.

Parameters: Three ↓

- ListType — The type of list to place on the HTML page.
- ListName — The name of the list on the appointment search screen.

- Size – The number of items to be displayed on the list without requiring the student to scroll.

Usage Syntax: **<WC@List>Counselor,Counselor,6</WC@List>**

b. SpecialtyGroup

Description: Places a list of available specialty groups (e.g., Math advisors) for students to select.

Parameters: Three ↓

- ListType The type of list to place on the HTML page
- ListName The name of the list on the group selection screen.
- Size The number of items to be displayed on the list without requiring the student to scroll.

Usage Syntax: **<WC@List>CounselorGroup,group,6</WC@List>**

c. Dow

Description: Places a list of days of the week to allow students to choose the day for their appointment.

Parameters: Four ↓

- ListType The type of list to place on the HTML page.
- ListName The name of the list.
- UseScript Whether the DOWListScript method will be used.
- Size The number of items to be displayed on the list without requiring the student to scroll.

Usage Syntax: **<WC@List>DOW,DayOfWeek,True,6</WC@List>**

d. Reason

Description: Places a list of available reasons at the position the method is called within the HTML page.

Parameters: Four ↓

- ListType The type of list to place on the HTML page.
- ListName The name of the list.
- Group The desired reason code group.

- Size — The number of items to be displayed on the list without requiring the student to scroll.

Usage Syntax: **<WC@List>Reason, reason, <WC@Variable>ApptReasonGroup</WC@Variable>, 5</WC@List>**

e. ScheduleCode

Description: Places a list of available schedule codes at the position the method is called within the HTML page.

Parameters: Four ↓

- ListType — The type of list to place on the HTML page
- ListName — The name of the list.
- CodeType — The type of schedule codes to list (All - 1, Single Student - 2 or Group - 3).
- Size — The number of items to be displayed on the list without requiring the student to scroll.

Usage Syntax: **<WC@List>ScheduleCode,code,1,5</WC@List>**

f. Time

Description: Places a list of valid appointment times to allow students to choose the time for their appointments.

Parameters: Four ↓

- ListType — The type of list to place on the HTML page.
- ListName — The name of the list.
- FirstOrLast — If FALSE, the first item on the list will be selected. If TRUE, the last item on the list will be selected.
- Size — The number of items to be displayed on the list without requiring the student to scroll.

Usage Syntax: **<WC@List>Time,StartTime,False,6/WC@List**

4. Script Tag

The following eight Javascript functions can be generated by using the script tag: ApptReasonScript, CancelApptScript, CancelReasonOnClick, CancelReasonScript, CommitApptScript, DOBFormatScript, DOWListScript, and PrintWebPage.

a. ApptReasonScript

Description: Places a JavaScript function at the position the tag is placed within the HTML page. This function serves to verify the student has selected a reason if this option has been selected on the *e·SARS* configuration screen. In addition to the reason, the students contact phone number and extension are verified. If there is an invalid phone number entered in SARS·GRID, this function will FORCE the student to enter a valid one BEFORE the appointment can be scheduled.

Parameters: One ↓

- ScriptName — The script to place on the HTML page

Usage Syntax: **<WC@Script>ApptReasonScript</WC@Script>**

b. CancelApptScript

Description: Places a JavaScript function at the position the tag is placed within the HTML page. This function serves to prompt the student with a confirmation alert box. If the student chooses to cancel the appointment, the student will be prompted to select a reason.

Parameters: Three ↓

- ScriptName — The script to place on the HTML page
- UseMessage — If TRUE, an alert box will show the message in the Message parameter.
- Message — The text of the message for prompting students when they click on the CANCEL button.

Usage Syntax: **<WC@Script>CancelApptScript,True,Cancel appointment?</WC@Script>**

c. CancelReasonOnClick

Description: This method places an onClick event handler at the position the tag is placed within the HTML page. This event handler serves to call the JavaScript function that is placed by the CancelReasonScript method.

Parameters: One ↓

- ScriptName — The script to place on the HTML page.

Usage Syntax: **<WC@Script>CancelReasonOnClick</WC@Script>**

d. CancelReasonScript

Description: Places a JavaScript function at the position the tag is placed within the HTML page. This function serves to verify that the student has selected a reason for the appointment cancellation.

Parameters: One ↓

- ScriptName The script to place on the HTML page

Usage Syntax: **<WC@Script>CancelReasonScript</WC@Script>**

e. CommitApptScript

Description: Places a JavaScript function at the position the tag is placed within the HTML page. Transmits the information for the selected appointment to the HTML page that will reserve the appointment for the student and prompt the student for a reason for the appointment. This page also displays the student's current contact phone number, giving the student the option to update it if necessary.

Parameters: One ↓

- ScriptName The script to place on the HTML page

Usage Syntax: **<WC@Script>CommitApptScript</WC@Script>**

f. DOBFormatScript

Description: Places a JavaScript function at the position the tag is placed within the HTML page and is used to verify whether the person signing on to *e·SARS* is an authorized student user. This function formats the DOB to the format chosen on the configuration page. The only requirement is that it must be a valid date.

Parameters: Three ↓

- ScriptName The script to place on the HTML page.
- DOBField The name of the DOB field on the login HTML page.
- Message The message to be displayed if the DOB is entered incorrectly.

Usage Syntax: **<WC@Script>DOBFormatScript, dob, Birth Date entry is not correct.\n\nPlease enter your Birth Date\nand click Continue.</WC@Script>**

Note: In JavaScript the **\n** causes a new line to be entered in an alert box. The student will not see the **\n**.

g. DOWListScript

Description: Controls how the browser handles the DOWList. Places a JavaScript function at the position the tag is placed within the HTML page. It prevents the student from selecting ALL in the DOWList in addition to another day (Monday – Friday).

Parameters: One ↓

- ScriptName The script to place on the HTML page

Usage Syntax: **<WC@Script>DOWListScript</WC@Script>**

h. PrintWebPage

Description: Places a command to print the current web page at the position the method is called within the HTML page. This tag is ALWAYS placed within the <BODY> tag.

Parameters: One ↓

- ScriptName The script to place on the HTML page

Usage Syntax: **<body background="images/NBayBG.gif" bgcolor="white" <WC@Script>PrintWebPage</WC@Script>>**

Note: This script will have no effect unless the Print Receipt & Web Page options are selected in *e·SARS* Configuration.

5. Variable Tag

The following thirteen different variable values can be retrieved by using the variable tag: ApptReasonGroup, CancelReasonGroup, Counselor, CurrentAppointments, Ext, FullDate, IDFormatDesc, MaxAppts, Name, Phone, Room, Time, and TimeOutLength.

a. ApptReasonGroup

Description: Places the reason code group, as defined on the e·SARS configuration screen, at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>ApptReasonGroup</WC@Variable>**

b. CancelReasonGroup

Description: Places the reason code group, as defined on the e·SARS configuration screen, at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>CancelReasonGroup</WC@Variable>**

c. Counselor

Description: Places the name of the advisor for the selected appointment at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>Counselor</WC@Variable>**

d. CurrentAppointments

Description: Places the number of currently scheduled appointments for the student at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>CurrentAppointments</WC@Variable>**

e. Ext

Description: Places the extension for the students phone number at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>Ext</WC@Variable>**

f. FullDate

Description: Places the date of the selected appointment at the position the tag is placed within the HTML code. This date is formatted as follows: Tuesday, January 2, 2004.

Parameters: One ↓

- VariableName The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>FullDate</WC@Variable>**

g. IDFormatDesc

Description: Places the description of the current ID Format, as defined on the e·SARS configuration screen, at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName — The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>IDFormatDesc</WC@Variable>**

h. MaxAppts

Description: Places the maximum number of appointments per student, as defined on the e·SARS configuration screen, at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName — The variable name whose associated value is to be returned.

Usage Syntax: **<WC@Variable>MaxAppts</WC@Variable>**

i. Name

Description: Places the name of the current student at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName — The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>Name</WC@Variable>**

j. Phone

Description: Places the students phone number at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName — The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>Phone</WC@Variable>**

k. Room

Description: Places the advisor's room number for the selected appointment at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName – The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>Room</WC@Variable>**

l. Time

Description: Places the time for the selected appointment at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>Time</WC@Variable>**

m. TimeOutLength

Description: Places the timeout, as defined on the e·SARS configuration screen, at the position the tag is placed within the HTML code.

Parameters: One ↓

- VariableName The variable name whose associated value is to be returned

Usage Syntax: **<WC@Variable>TimeOutLength</WC@Variable>**

45.2.2 HTML & ASP Pages used by e·SARS

The web interface is comprised of the following HTML & ASP pages:

ApptQuery.htm
CancelReason.htm
ConGroupSel.htm
CriticalErrorMsg.htm
EarlyAlertsSel.htm
GoBack.htm
LoginErr.htm
MainMenu.htm
OutOfRange.htm
QueryResults.htm
ReasonSelection.htm
Receipt.htm
SessionExpired.htm
SlotTaken.htm
StudentAlert.htm
StudentLogin.htm
SystemDown.htm
ViewAppts.htm
ViewHistory.htm
eSARS.asp
eSARS_Config.asp
Init.asp

1. ApptQuery.htm

Purpose: Allows the student to specify criteria to find available appointments.

Tags in use:
List
- Counselor
- DOW
- Time

Script
- DOWListScript

Variable
- TimeOutLength

2. CancelReason.htm

Purpose: Allows the student to specify a reason when canceling appointments.

Tags in use:
List
- Reason

Script
- CancelReasonOnClick
- CancelReasonScript

Variable
- CancelReasonGroup
- TimeOutLength

3. ConGroupSel.htm

Purpose: Presents the student with a list of available specialty groups (e.g., Math advisors) to speed up the process of finding an appointment with an advisor who specializes in the desired area.

Tags in use: List
- SpecialtyGroup

Variable
- TimeOutLength

4. CriticalErrorMsg.htm

Purpose: Displays a message to the student in the event of a critical error occurring in e·SARS.

Tags in use: None

5. EarlyAlertsSel.htm

Purpose: Displays an Early Alert message to the student when logging in to e·SARS or SARS·TRAK.

Tags in use: List
- Early Alerts

6. GoBack.htm

Purpose: Navigates to the previous web page.

Tags in use: None

7. LoginErr.htm

Purpose: Displays a message to the student in the event that their identifier or Birth Date are invalid.

Tags in use: Variable
- IDFormatDesc

8. MainMenu.htm

Purpose: The main page in the e·SARS application. This page presents the students with the options to Make or Cancel appointments as well as view their appointment history.

Tags in use: Button
- MakeApptButton
- ViewAppButton

Variable
- TimeOutLength

9. OutOfRange.htm

Purpose: Displays a message that the requested date is not within the available date range. This will occur if the Limit Dates option is enabled on the e·SARS configuration screen and the current date falls outside of the date range specified by the Start and Stop date entries.

Tags in use: None

10. QueryResults.htm

Purpose: Displays a table listing all of the appointments which match the criteria specified on the ApptQuery.htm page.

Tags in use: Function
- ApptQuery

Script
- CommitApptScript

Variable
- TimeOutLength

11. ReasonSelection.htm

Purpose: Presents the student with a predefined list of reasons, as specified on the e·SARS configuration screen, for this appointment. The student's telephone number is also displayed. A valid phone number is required and must be entered before the student can commit their appointment.

Tags in use: List
- Reason

Script
- ApptReasonGroup
- ApptReasonScript

Variable
- Ext
- Phone
- TimeOutLength

12. Receipt.htm

Purpose: Displays a message to the student confirming the appointment they have just scheduled.

Tags in use: Script
- PrintWebPage

Variable
- Counselor
- FullDate
- Room
- Time

13. SessionExpired.htm

Purpose: Displays a message to the student in the event that a long period of inactivity has caused their connection to the web server to become invalid.

Tags in use: None

14. SlotTaken.htm

Purpose: Displays a message in the event that another student has taken the appointment. This can happen if multiple students search for appointments at the same time and two or more try to select the same appointment. The student who selects the appointment first will be allowed to proceed, whereas the other students will be redirected to this page.

Tags in use: None

15. StudentAlert.htm

Purpose: Displays a Student Alert message to the student when logging in to e·SARS or SARS·TRAK.

Tags in use: List
- Student Alerts

16. StudentLogin.htm

Purpose: Prompts the student for their identifier, as specified on the e·SARS configuration screen, and Birth Date to log-in to e·SARS.

Tags in use: Script
- DOBFormatScript
- SSNFormatScript

Variable
- IDFormatDesc

17. SystemDown.htm

Purpose: Displays a message to the student in the event that the e·SARS application is not functioning.

Tags in use: None

18. ViewAppts.htm

Purpose: Displays a table listing all of the appointments the student currently has scheduled in SARS·GRID.

Tags in use: Function
- ViewAppts

Script
- CancelApptScript

Variable
- TimeOutLength

19. ViewHistory.htm

Purpose: Displays a table listing the n, as specified in the e·SARS configuration screen, most recent appointments/cancellations for this student.

Tags in use: Function
- ViewHistory

Variable
- TimeOutLength

20. eSARS.asp

Purpose: Contains Visual Basic Script code used to instantiate the e·SARS ActiveX component.

This page cannot be changed.

21. eSARS_Config.asp

Purpose: Contains Visual Basic Script code used to instantiate the e·SARS configuration ActiveX component.

This page cannot be changed.

22. Init.asp

Purpose: Contains Visual Basic Script code used to configure e·SARS to work with a specific department.

Required Settings: Department
- This value must be different for each e·SARS application.

SystemDSN
- The full path and file name of the DSN file used to connect to the SARS·GRID Database.

SECTION 46 – SARS·CHAT CONFIGURATION

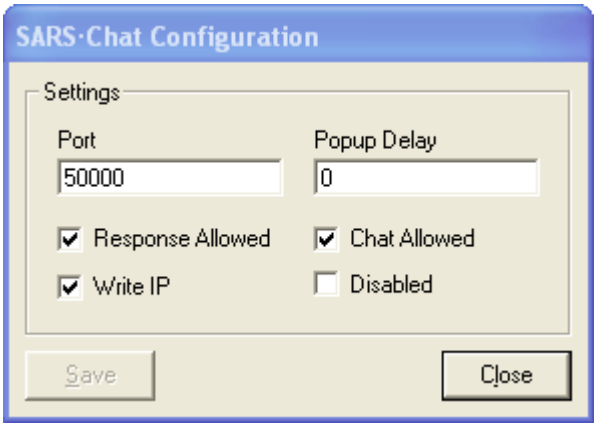
46.0 Overview

SARS·CHAT is a separate application that operates independently from SARS·GRID. The application resides in the same directory as the SARSMENU.exe program.

Its function is to automatically send notification messages to advisors informing them that their appointments have arrived and are waiting to be seen. Even though this application is running on the server, each Location must select the option to ENABLE NOTIFICATION OF APPOINTMENT ARRIVAL in the Miscellaneous Settings screen in Location Maintenance in order to activate the system for that Location. (See "Miscellaneous Settings" in Part I, Section 4.5.)

If the school wishes to use instant messaging so that users can send and receive messages, broadcast messages, and use the notification of appointment arrival feature, the application must first be configured for use. This should be done by the computer specialist.

Here is an example of the SARS·Chat Configuration screen layout.



The options are:

- PORT: Use to enter a port for use by this application. It must be a port that is in the range of 49152 – 65535 and is not being used by any other application.
- POPUP DELAY: Use to set the number of milliseconds after which a pop up message will be removed from the recipient's screen.
- RESPONSE ALLOWED: Use to select the option to permit a user to reply to a message.
- CHAT ALLOWED: Use to select the option to permit senders and recipients of messages to chat interactively using a split screen.
- WRITE IP: Use to automatically write the IP address of the computer that is running the Chat server to the configuration file. Do not select this option if more than one network card is installed in the server (such as when one network card is used for communicating with computers on the internal network and another network

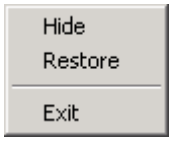
card is used for communicating with the internet). In such a case, the IP address of the Chat server must be specified manually.

- DISABLED: Use to disable the Chat server for the entire SARS database. If checked, users of that database will not see a lightning bolt, nor will they be able to send or receive messages. This feature is useful when a college has more than one SARS database (for example, one for DSPS and one for the rest of Student Services), and one of those databases does not wish to use the Chat feature.
- SAVE: Use to save new entries or changes made on the screen.
- CLOSE: Use to exit the screen.

46.1 Configure SARS·CHAT

The SARS·CHAT CONFIGURATION screen does not need to be modified unless a different setting is desired. When that is the case, follow the steps below:

1. Right-click on SARS·GRID Chat Server icon ( ) displayed on the taskbar to display the following screen:

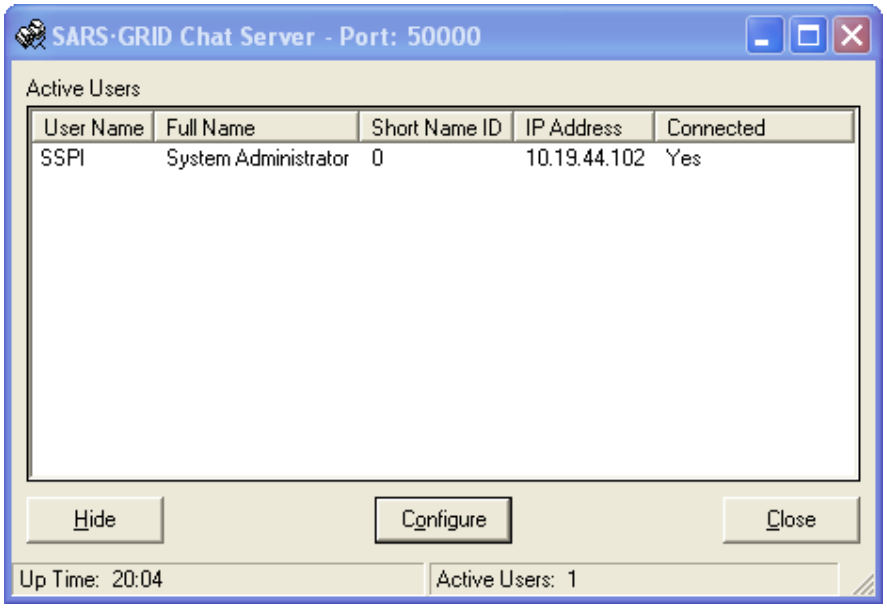


Notes
If the SARS·CHAT program is scheduled to launch from the Scheduled Tasks via the Control Panel, you will not see the icon.

It is recommended that the SARS·CHAT program be scheduled to launch automatically under two different circumstances: at the beginning of each workday, and at any time that the server is restarted for any reason.

2. Click on RESTORE.

The following screen is displayed:



3. Click on CONFIGURE. The SARS·CHAT CONFIGURATION screen will be displayed.

4. The PORT field default has been set at 50000. If this setting needs to be changed, type in a number (between 49152 and 65535) that is not being used by any other application.

5. The POPUP DELAY field default has been set at 0. This setting requires pop-up messages to remain on a recipient's screen until he/she manually closes the message by clicking on OK. To change the delay setting, type in a number to represent the number of milliseconds (1,000 milliseconds = 1 second) that should elapse before the pop-up message closes automatically.

6. The RESPONSE ALLOWED checkbox defaults to checked (yes). This feature permits recipients of messages to send a reply to the sender. (A REPLY button will be displayed on the notification message.) If desired, uncheck the checkbox to prevent use of the response option.

7. If desired, click on the CHAT ALLOWED checkbox to activate the feature that permits senders and recipients of messages to communicate interactively using a split screen.

8. If only one network card is installed in the computer, click on the WRITE IP checkbox to automatically write the IP address of the computer that is running the Chat server to the configuration file. Otherwise, leave this box unchecked and manually specify the IP address of the Chat server.

9. Click on the DISABLED checkbox to turn off the Chat server for the entire SARS database.

10. Click on SAVE.

11. Click on CLOSE to return to the SARS·GRID CHAT SERVER screen.

12. Click on HIDE.

Note
Do not click on CLOSE as it will deactivate the Chat Server program.

SECTION 47 –INSTALL AND CONFIGURE MY GRID (WEB VERSION)

47.0 Overview

If advisors are permitted to work with MY GRID from home or other remote locations, the computer specialist will need to install the web application and configure the system to enable this feature.

To install this application, the server must be running IIS 6.5 or later, the system must have ASP.Net 2.0 or later installed and have the ability to communicate with the SQL server where the SARS database is hosted.

Upon your request, SARS Software Products, Inc. will send two program files to the college to be installed on the college's web server, as follows:

- **CongridSetup.msi**
- **Setup.exe**

47.1 Install MY GRID (Web Version)

Installation is performed following the four steps described below.

47.1.1 Install the Programs

1. Run either **CongridSetup.msi** or **setup.exe**. (Either one will work the same.) A Welcome screen will be displayed.

2. Click on NEXT. A Select Installation Address screen will be displayed.

   a. Note that the value in the Site field is *Default Web Site*. Do not change this unless your college has a dedicated SARS website. If your institution has a dedicated SARS website, click on SITE ▼ and select the website that will be hosting the Web Version of MY GRID.

   b. Disregard DISK COST.

   c. (Optional) Note that the Virtual Directory name is *CounselorsGrid*. If desired, change the VIRTUAL DIRECTORY name by clicking on the Virtual directory field and typing in a new name.

3. Click on NEXT. A Confirm Installation screen will be displayed and the installation process will begin.

4. When installation is complete, click on NEXT. An Installation Complete screen will be displayed.

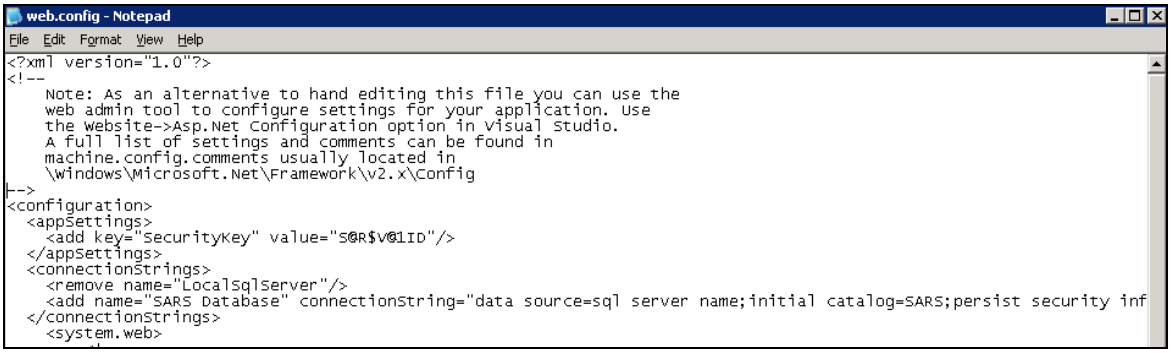
5. Click on CLOSE to exit the installation program.

47.1.2 Verify the Installation

1. Click on START.
2. Click on ALL PROGRAMS.
3. Click on ADMINISTRATION TOOLS.
4. Select INTERNET INFORMATION SERVICE (IIS) MANAGER.
5. Click on *Default Web Site* (or on the name of the SARS website, if a designated site exists).
6. Check to ensure that the following two virtual directories exist:
   - *CounselorsGRID*
   - *CounselorsGridData*
7. Keep the screen open for now.
8. Return to the INTERNET INFORMATION SERVICE (IIS) MANAGER.
9. Right click on *CounselorsGridData* and select PROPERTIES.
10. Find the LOCAL PATH field and note the path contained in that field. This is the location of the web pages and will be needed for the next step.
11. Close the screen.

47.1.3 Edit the web.config File

1. Right click on the START menu and select EXPLORE.
2. Navigate to the path that was identified in step 10, above.
3. Open the web.config file in a text editor (Notepad recommended). The following window will be displayed:



4. Navigate to the “data source” segment below <connection strings>.
   a. Edit the data source section by entering your SQL server name.
   b. Edit the catalog section by entering the name of the SARS Database.

c. Save the data.

d. Only if additional SARS databases exist, copy and paste the SARS Database connection string line and edit it for each additional database, specifying a different name for each database (e.g., Counseling, Advising, DSPS or a text description of each database).

Note
If more than one SARS database will be used, a small customization will need to be performed for the Logon screen. You will need to contact SARS Software Products, Inc. for more information.

e. When done, save the data and close the Notepad window.

47.1.4 Verify the Usability of the Application

1. Click on START.
2. Click on ALL PROGRAMS.
3. Click on ADMINISTRATION TOOLS.
4. Select INTERNET INFORMATION SERVICE (IIS) MANAGER.
5. Click on *CounselorsGrid*.
6. Navigate to the **logon.aspx** page.
7. Right click and open the browser.
8. If the installation and editing have been successful, the logon page will be displayed.
9. Log in using a SARS·GRID user name and password. This logon ID must have a SHORT NAME assigned to it.
10. Click on CONTINUE. The Web Version of MY GRID will be displayed.
11. Log off.

Proceed to Section 47.2 to configure the web data options.

47.2 Configure Web Data Options

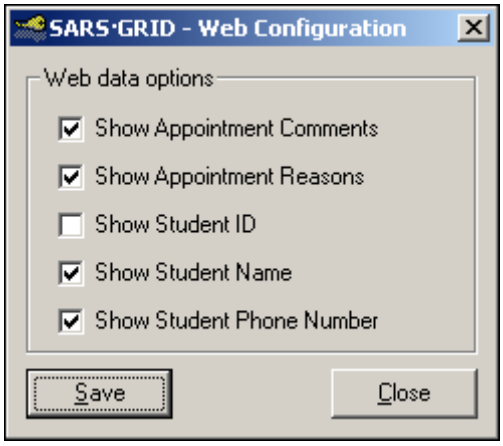
The purpose of this configuration is to specify the data elements of MY GRID that will be either displayed or hidden when viewed from remote locations. By default, all display options for the MY GRID Web Version are selected. To edit the display options, follow the steps below:

1. From the SARSGRID directory on the web server, click on the program entitled **ConGridWebPermissions.exe**. The SARS·GRID logon screen will be displayed.

2. Click on USER NAME and type in your user name.

3. Click on PASSWORD and type in your password.

4. Click on CONTINUE. The SARS·GRID Web Configuration screen will be displayed. Here is an example.



The Web data options are:

- SHOW APPOINTMENT COMMENTS: Use to display appointment comments on MY GRID when viewing it from home.
- SHOW APPOINTMENT REASONS: Use to display appointment reasons on MY GRID when viewing it from home.
- SHOW STUDENT ID: Use to display student identification numbers on MY GRID when viewing it from home.
- SHOW STUDENT NAME: Use to display students' names on MY GRID when viewing it from home.
- SHOW STUDENT PHONE NUMBER: Use to display students' telephone numbers on MY GRID when viewing it from home.

5. Click on the web data options that advisors will be permitted to view when working with MY GRID from any remote location.

Tip Exercise caution when making these selections to protect student privacy needs.

6. When done, click on SAVE.

7. Click on CLOSE.

SECTION 48 – SARS·EXCHANGE EXPORT SERVICE FOR MS OUTLOOK™

48.0 Overview

SARS·Exchange Export Service is a separate program that resides on the school's server. It is available for computer staff to configure an automated export process by which advisors' schedules will be exported to Microsoft Exchange on a pre-selected schedule. This section discusses the steps for installing and then configuring the application.

SARS·Exchange Export Service uses Microsoft Exchange Web Services to access the advisors' calendars. Microsoft Exchange Web Services is installed automatically with Microsoft Exchange Server 2007 & 2010.

SARS·Exchange Export Service can be installed on any member server in your domain (e.g., it does not need to be installed on the Exchange server).

Note
There are two methods to allow access to the advisors' calendars.

#1: Impersonation. Impersonation requires the domain account running the service to be granted impersonation rights on each advisor's mailbox. Refer to the following MSDN article: http://msdn.microsoft.com/en-us/library/bb204095(EXCHG.80).aspx

-or-

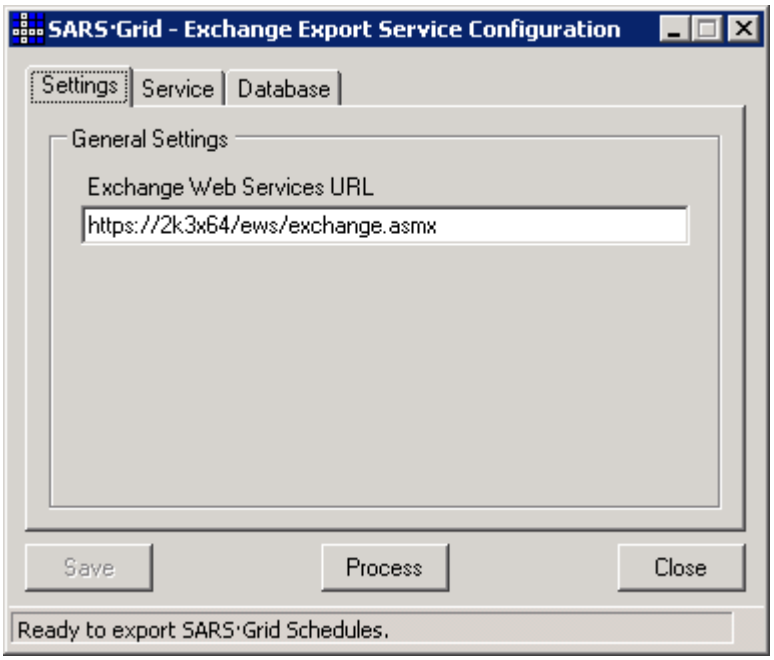
#2: Delegation. Delegation is granted via Microsoft Outlook on a per user basis. Each advisor would need to grant Editor rights on his or her calendar to the domain account that is running the service.

48.1 Install and Configure the Export Service

1. Run the setup.exe program for the SARS·GRID Exchange Export Service application. The application should be installed on the school's server, and the shortcut for the file will be located in the Start menu under SARS Software Products/Utilities.

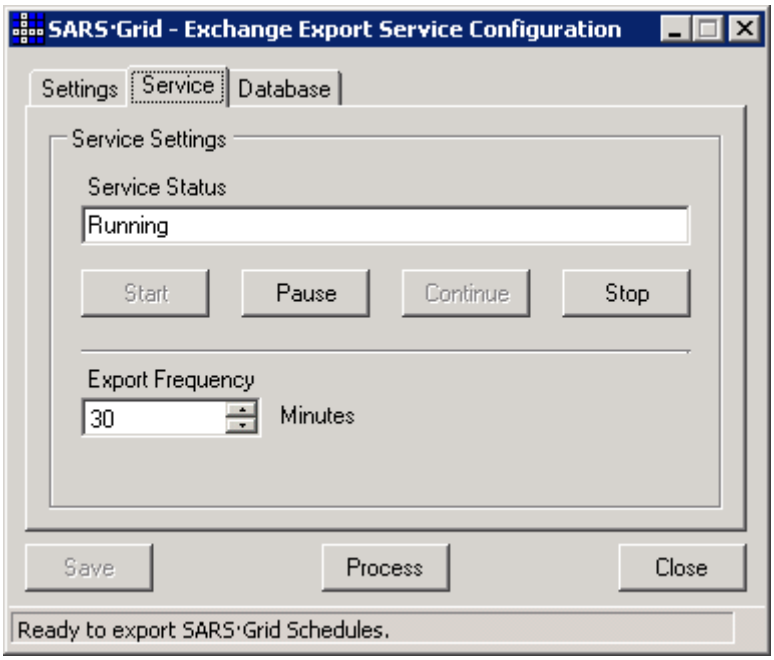
2. After installation is complete, left-click on the program. The SARS·GRID Exchange Export Service Configuration screen will be displayed.

Here is an example:



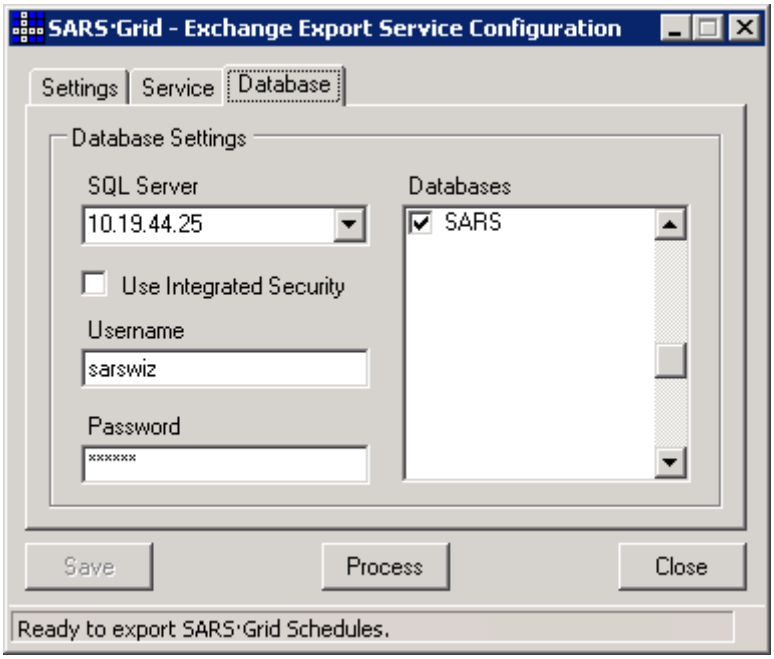
3. From the SETTINGS tab, click on the field under Exchange Web Services URL and type in the URL for the exchange web service. The URL must be entered after https:// and before /ews as shown in the example. The */ews/exchange.asmx* must be retained.

4. Click on the SERVICE tab to display the following screen:



Initially, the SERVICE STATUS field will say "Stopped." Click on EXPORT FREQUENCY field and then select or type in the frequency with which the export should occur, in minutes. The default frequency is 60 minutes.

5. Click on the DATABASE tab to display the following screen:



a. Click on the SQL SERVER field and select or type in the name or IP address of the SQL server where the SARS database resides.

b. If using integrated security with SARS·GRID, check the USE INTEGRATED SECURITY checkbox. This action will disable the USERNAME and PASSWORD fields and populate the DATABASES field with all existing SARS·GRID databases.

c. Then click on the checkboxes adjacent to those SARS·GRID databases from which the service should process and export schedules.

-or-

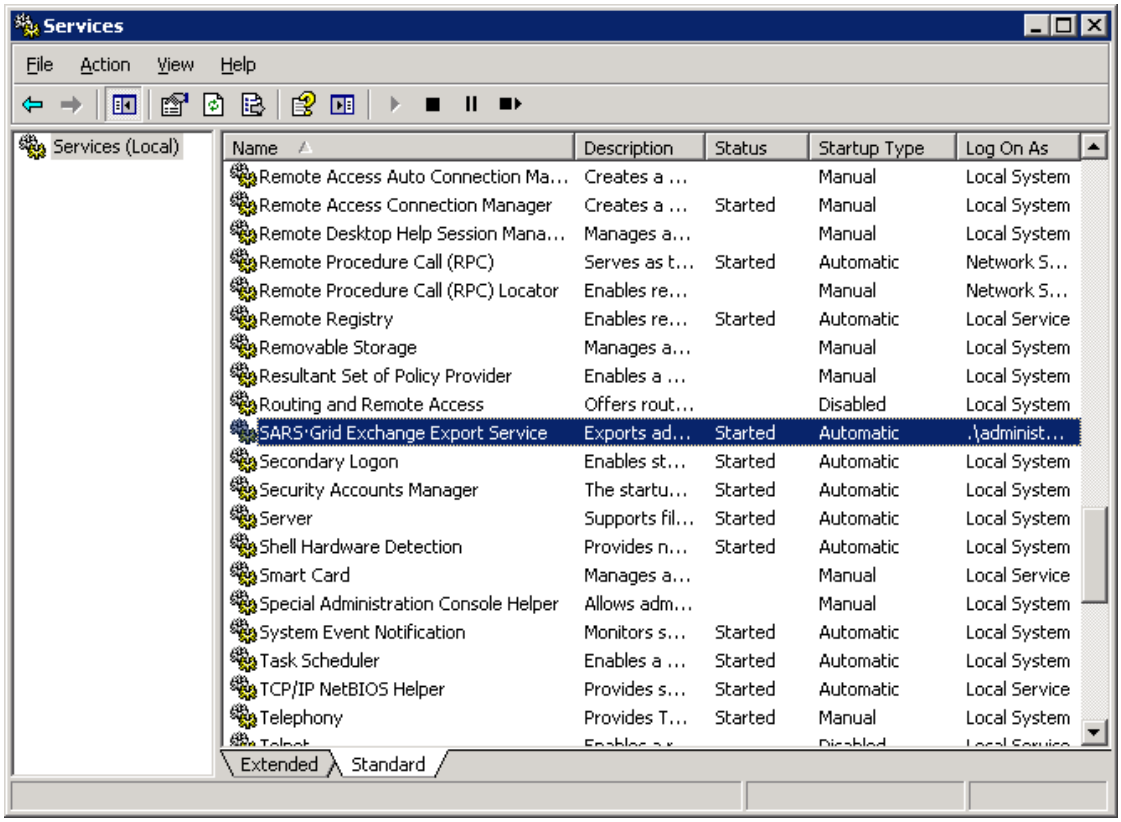
d. If not using integrated security with SARS·GRID, leave USE INTEGRATED SECURITY unchecked and contact SSPI to request the USERNAME and PASSWORD to be entered in those fields.

6. Click on SAVE.

7. Click on CLOSE.

8. Now navigate to the Control Panel – Administrative Tools – Services, and scroll to find the SARSGRID exchange export service.

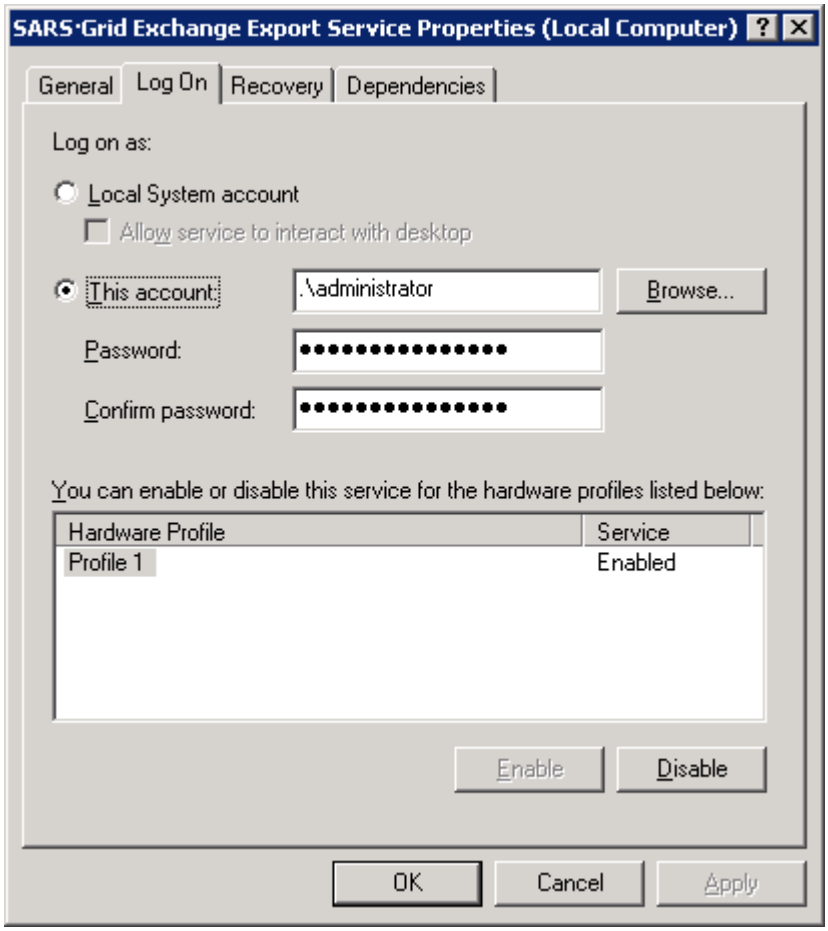
Here is an example:



9. Right click on that line and select PROPERTIES.

10. The SARS·Grid Exchange Export Service Properties screen will be displayed.

Here is an example:



11. The screen defaults to the GENERAL tab, so click on the LOG ON tab.

    a. Click on THIS ACCOUNT and then type in the name of the user account that has been granted full-mailbox access for each advisor whose schedule the program will be exporting. Your exchange server administrator must perform the granting of this access right.

    b. Click on the PASSWORD field and type in the Password.

    c. Click on the CONFIRM PASSWORD field and re-type in the Password.

    d. Click on OK.

12. Click on the Start button or right-click on the specific service and click on START. The service will perform the action automatically at the specified frequency.

SECTION 49 – SQL SERVER BACKUP AND MAINTENANCE

49.0 Overview

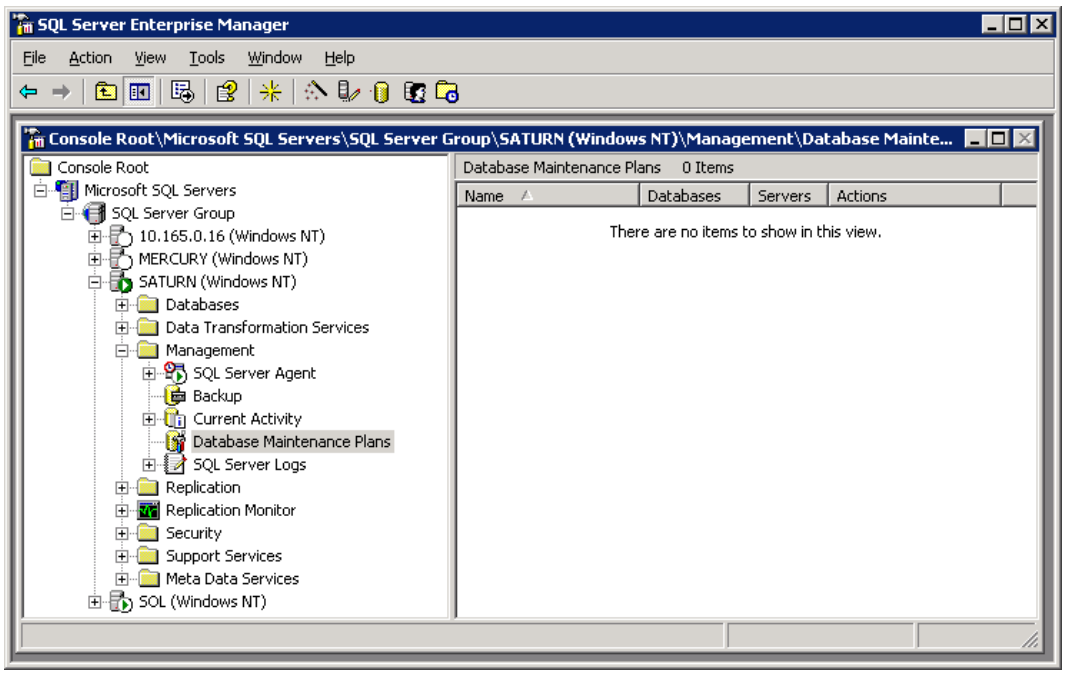
This Section provides instructions for backing up the SARS database on SQL servers. The school's technology staff should perform this task.

49.1 Set up the Maintenance Plan

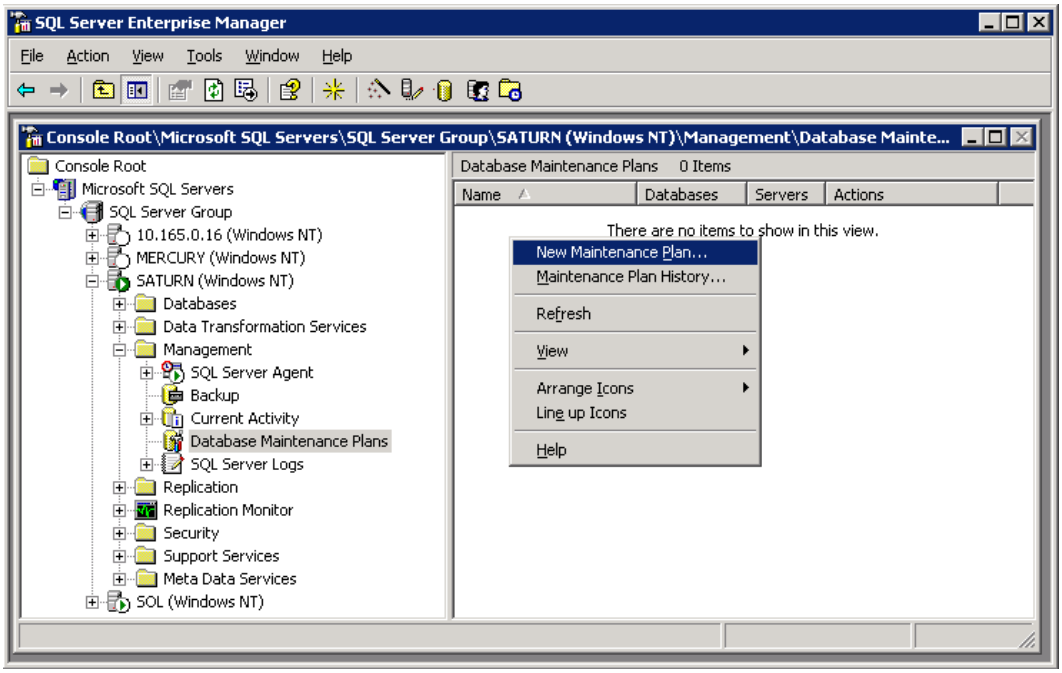
1. From the Program Menu, start the SQL ENTERPRISE MANAGER.

2. Expand the list to display the location of the SARS database.

3. Expand the Management folder to display DATABASE MAINTENANCE PLANS. Here is an example:

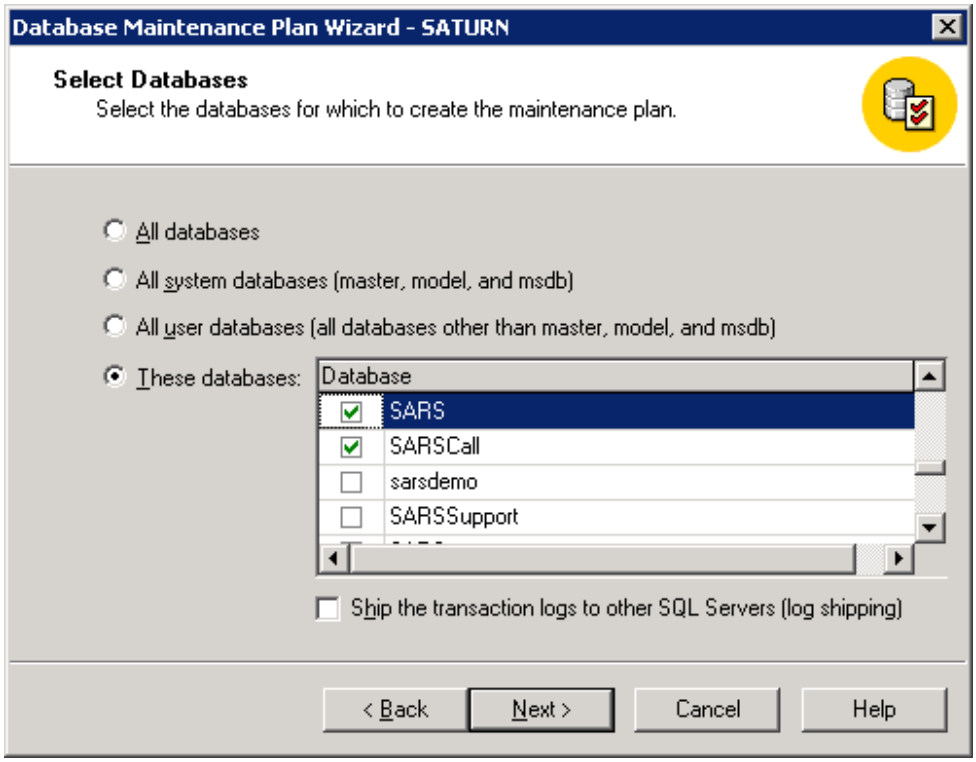


4. Right click on DATABASE MAINTENANCE PLANS and then select NEW MAINTENANCE PLAN, as shown below.

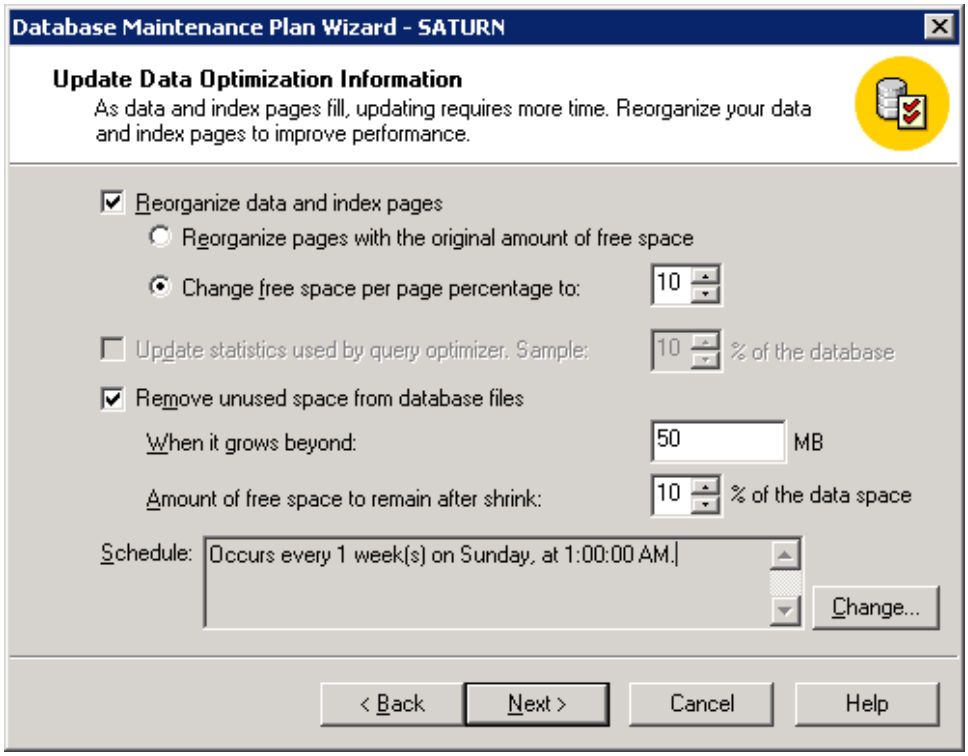


5. The initial DATABASE MAINTENANCE PLAN WIZARD screen will be displayed, as shown below.

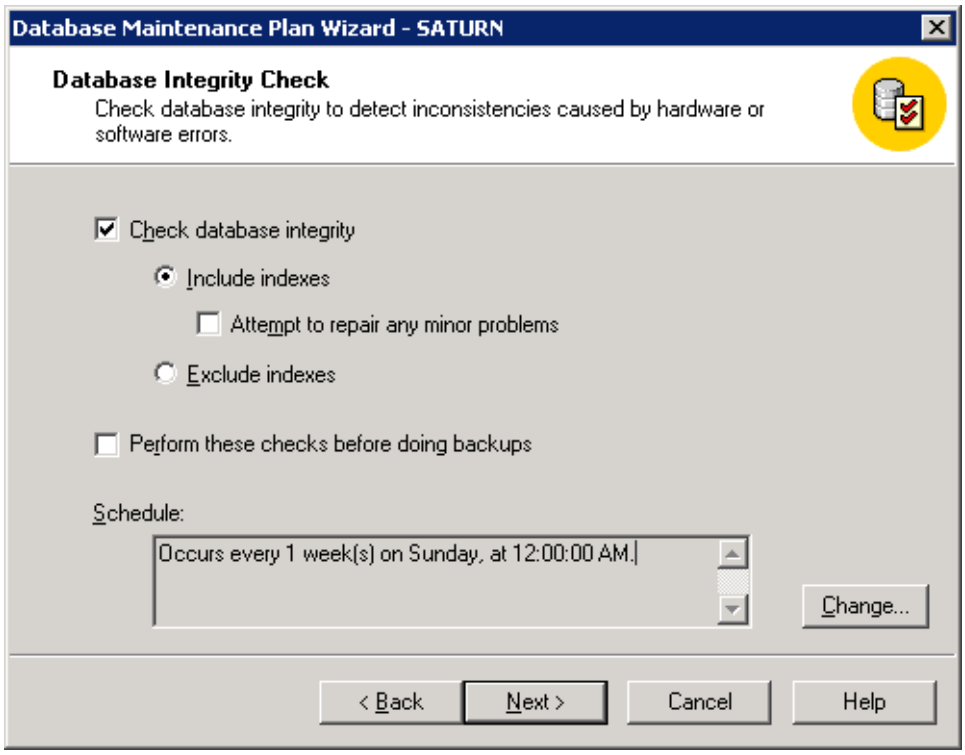
6. Click on NEXT to display the SELECT DATABASES screen. Click on THESE DATABASES, and then click on the SARS checkbox(es), as appropriate (example shown below).



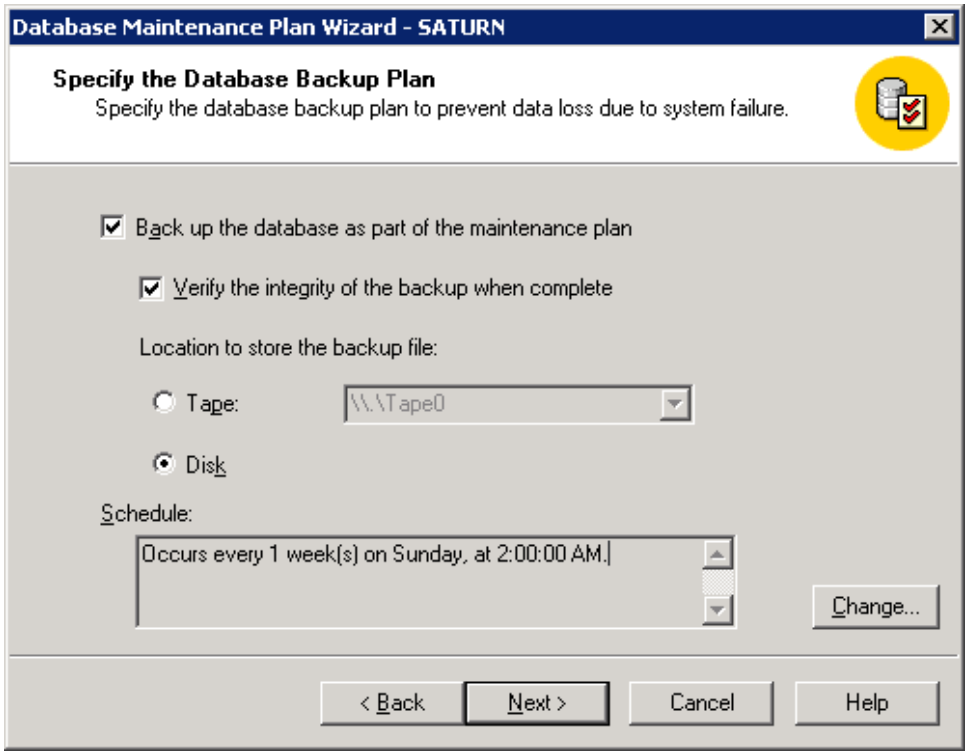
7. Click on NEXT to display the UPDATE DATA OPTIMIZATION INFORMATION screen. Click on or select the settings shown below.



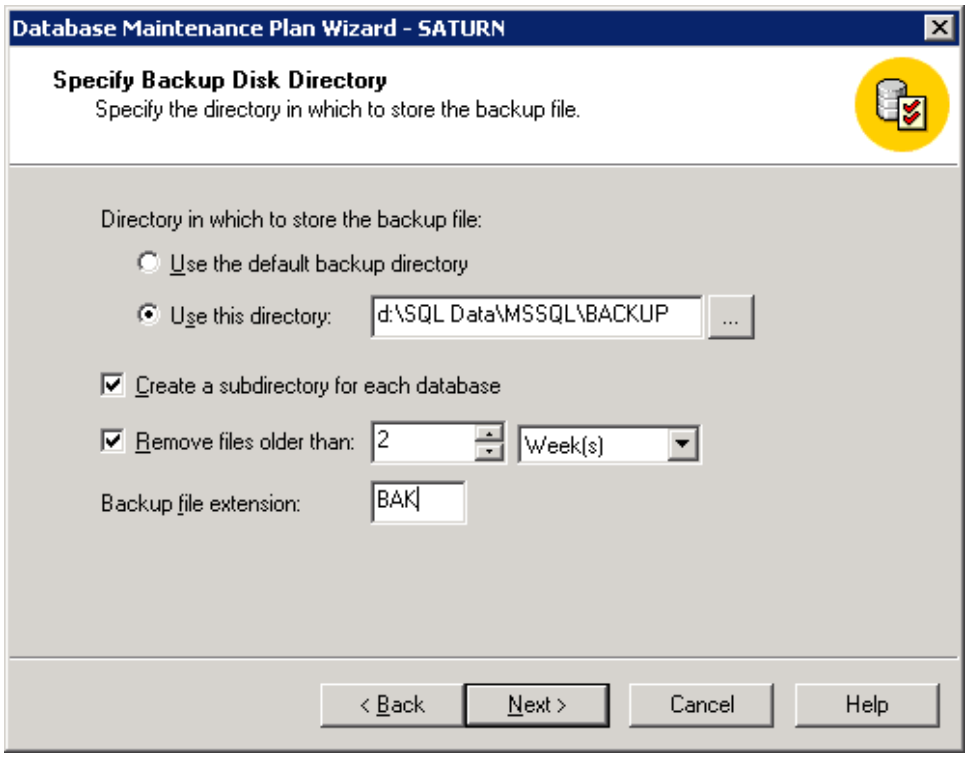
8. Click on NEXT to display the DATABASE INTEGRITY CHECK screen. Select the settings that are shown below.



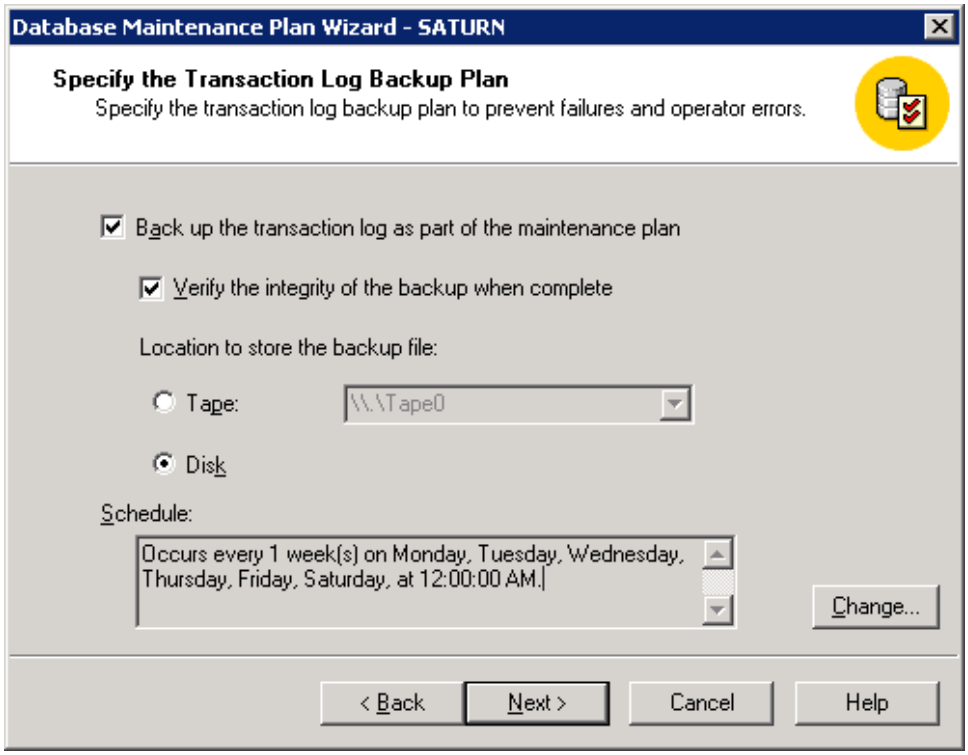
9. Click on NEXT to display the SPECIFY THE DATABASE BACKUP PLAN screen. Select the settings that are shown below.



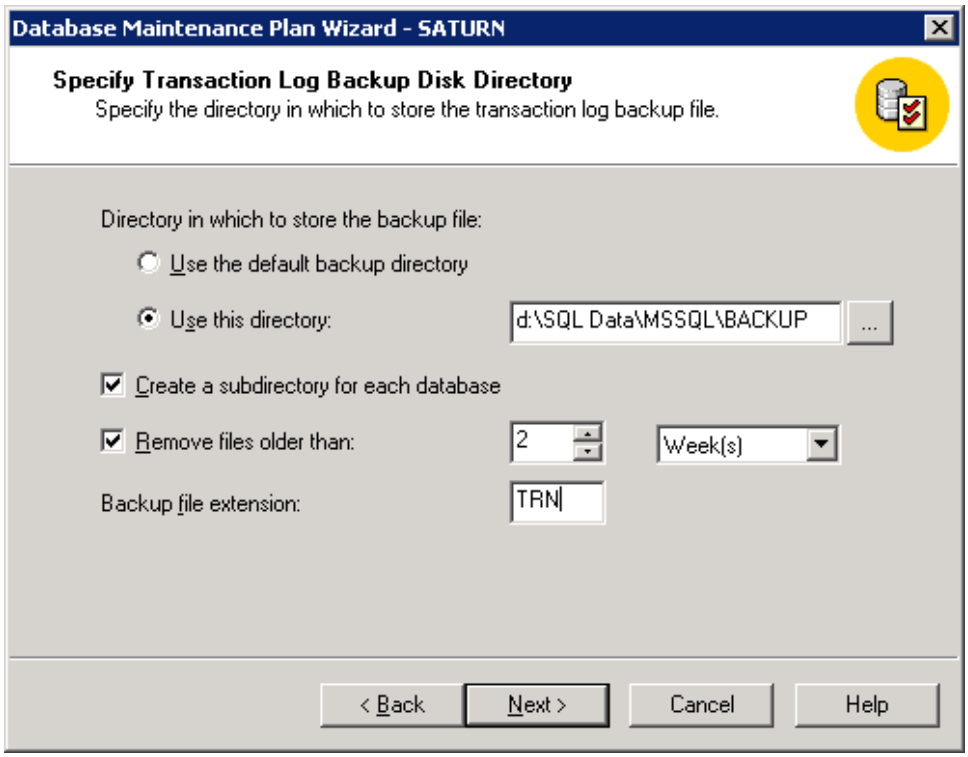
10. Click on NEXT to display the SPECIFY BACKUP DISK DIRECTORY screen. Select the settings that are shown below.



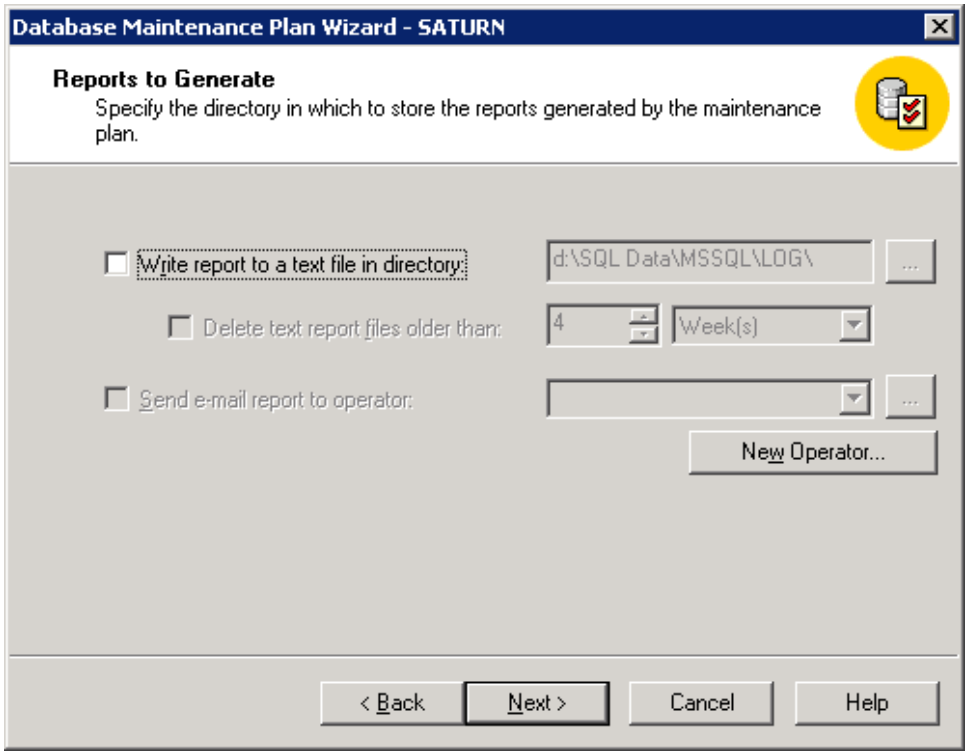
11. Click on NEXT to display the SPECIFY THE TRANSACTION LOG BACKUP PLAN screen. Select the settings that are shown below.



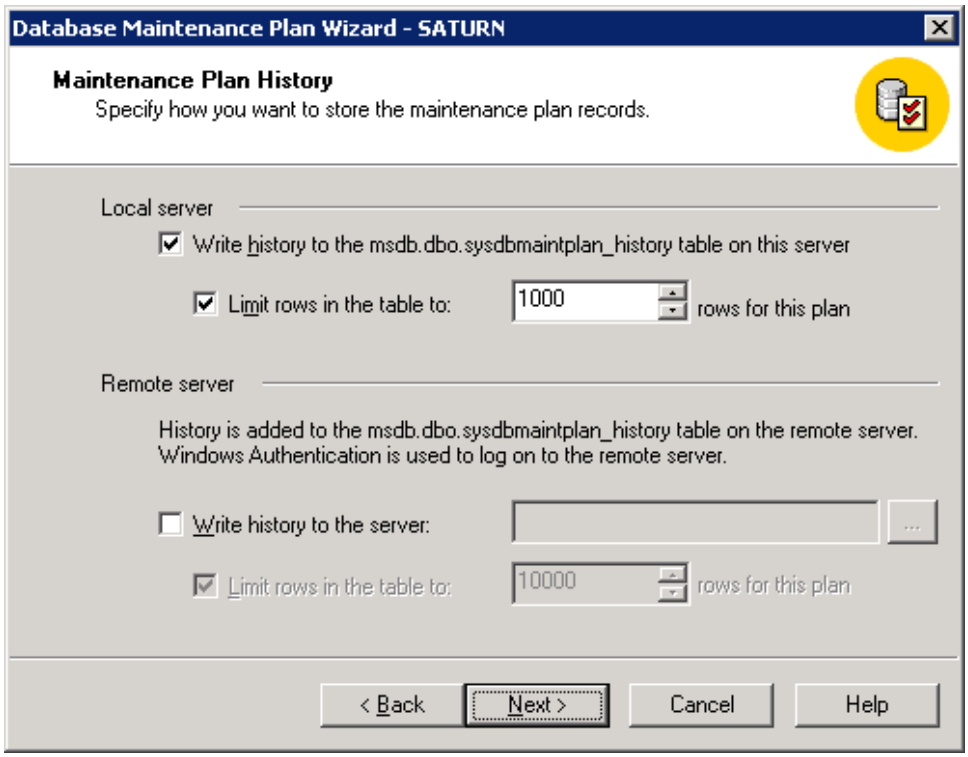
12. Click on NEXT to display the SPECIFY THE TRANSACTION LOG BACKUP DISK DIRECTORY screen. Select the settings that are shown below.



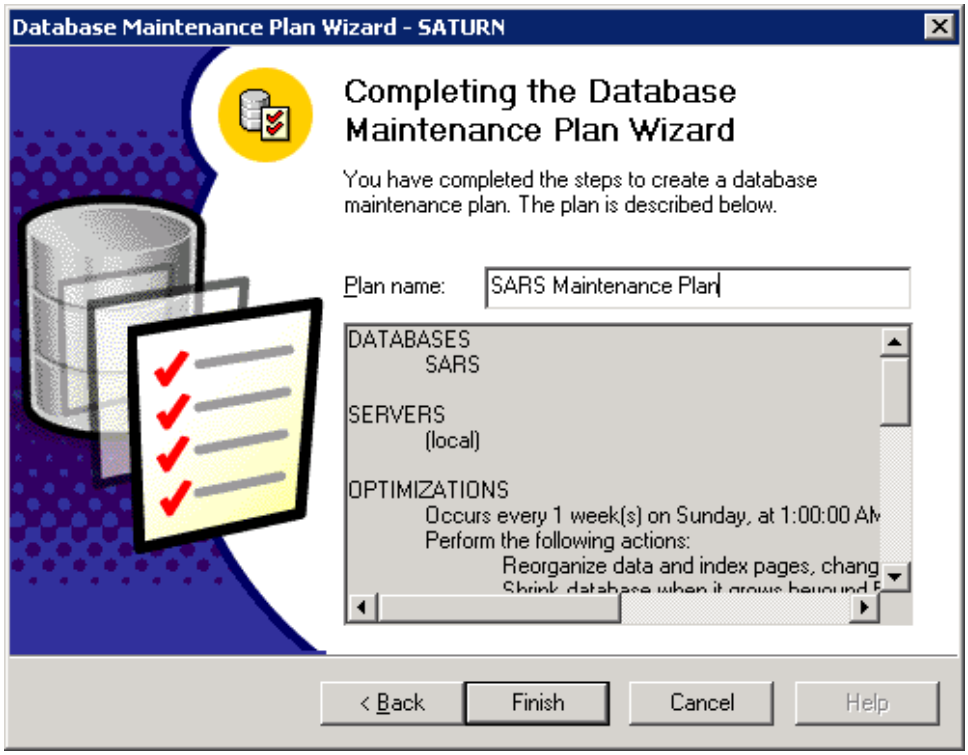
13. Click on NEXT to display the REPORTS TO GENERATE screen. Leave the settings at the defaults that are shown.



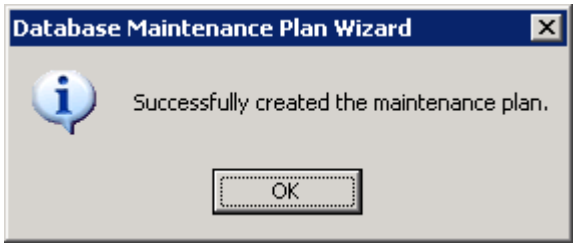
14. Click on NEXT to display the MAINTENANCE PLAN HISTORY screen. Leave the settings at the defaults that are shown.



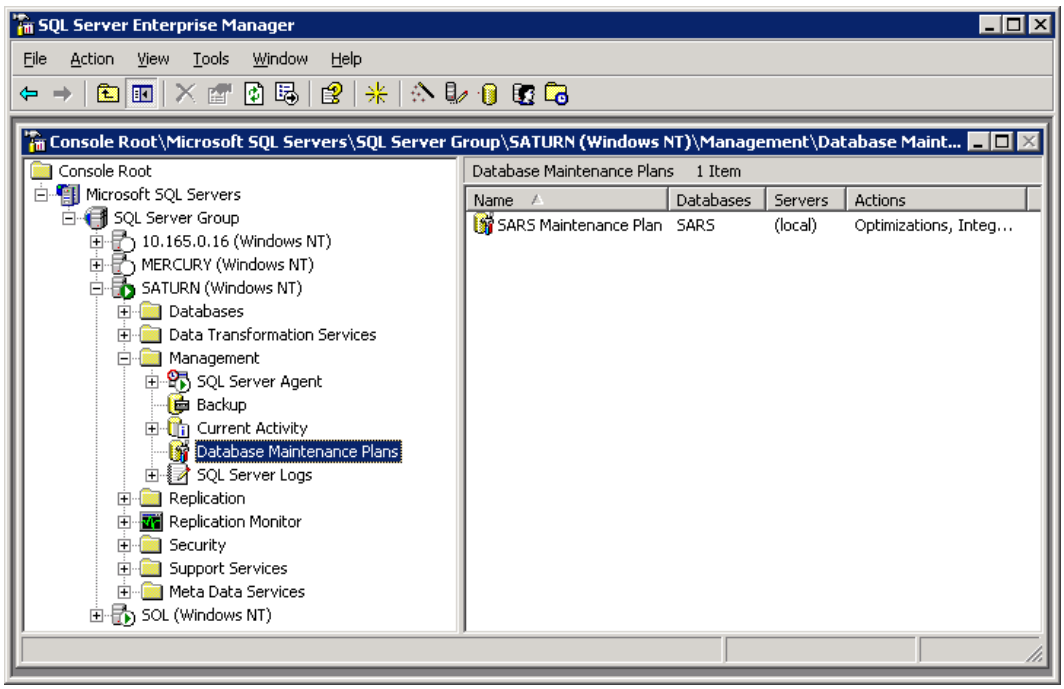
15. Click on NEXT to display the completion screen that is shown below. In PLAN NAME, type in the desired name of the backup plan for SARS (e.g., SARS Maintenance Plan).



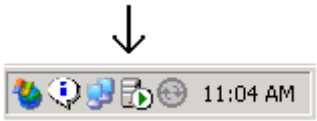
16. Click on FINISH. The following message will confirm that the maintenance plan was successfully created.



17. Click on OK and then return to the SQL SERVER ENTERPRISE MANAGER screen, which will now display the SARS maintenance plan that has been created. Here is an example.

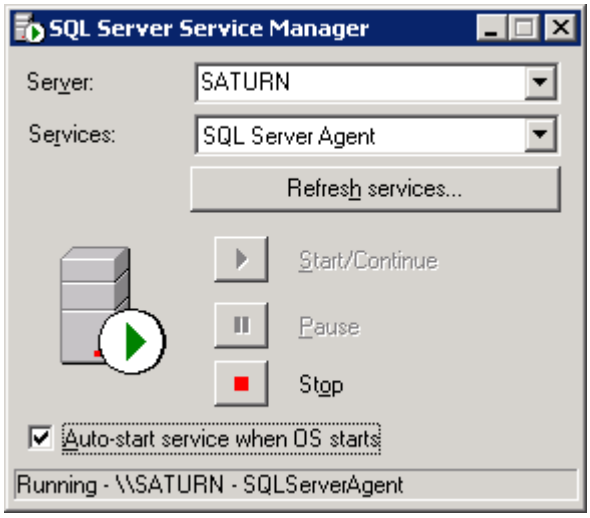


18. Double click on the Task Bar icon entitled Running\\server name, as shown below.



19. Bring up the SQL SERVER SERVICE MANAGER screen.

Here is an example:



a. Look at the SERVER field to ensure that it defaults to the previously selected server name.

b. In the SERVICES field, select SQL Server Agent if it is not already displayed.

c. Ensure that the SQL Server Agent is running by noting that the green arrow is displayed.

d. Click on the checkbox adjacent to AUTO-START SERVICE WHEN OS STARTS.

20. Click on **X** to close the screen. The backup will occur at the scheduled intervals without further action.

Note In addition to the maintenance operations discussed above, it is highly recommended that all Windows servers (and especially the SQL server) be rebooted at least every 30 days in order to keep the SARS database running at peak performance.

SECTION 50 – DATABASE UTILITIES

50.0 Overview

This Section introduces two utilities provided by SARS·GRID. They are:

50.1 The LogOff Program

50.1.1 Transaction Log

Some maintenance processes may be performed only when all users are logged off of SARS·GRID and any other SARS application that is linked to SARS·GRID. The LogOff Program is available for logging off all users.

If for some reason the database becomes unusable, the Transaction Log in conjunction with the last backup will assist you in rebuilding your SARS database.

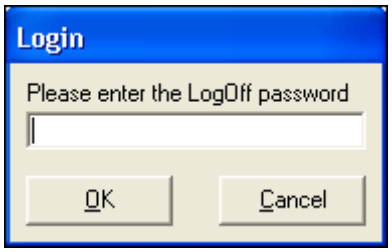
50.1 The LogOff Program

The LogOff program should be used by computer support staff before and after performing maintenance operations that require the logging off of all users of SARS·GRID, including users at satellite locations. It is used to force users off of the SARS·GRID system and to re-set the system so that they can log on again. When this program is used, it prevents anyone from attempting to gain access to SARS·GRID.

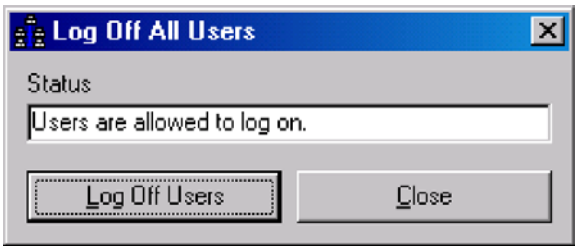
The LogOff program resides on the server in the directory that contains SARSMenu.exe

Before proceeding, contact SARS Software Products, Inc. to obtain the password.

1. Start LogOff.exe. A login screen will be displayed that looks like this:

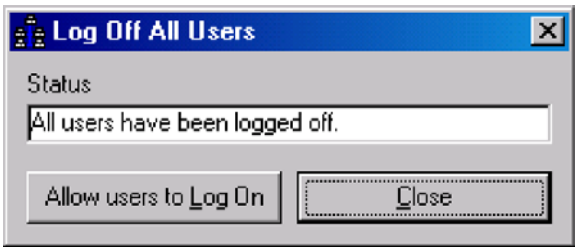


2. Type in the password and then click on OK. A Log Off All Users screen will be displayed. The status line will state, “Users are allowed to log on” as shown below.



3. Click on Log Off Users. The status message will state, “All users have been logged off.”

4. The toggle button will now be labeled ALLOW USERS TO LOG ON, as shown below.



Note
You may close the screen while the maintenance function is in process. However, you will need to log in again to perform steps 4 and 5 below.

5. When maintenance functions have been completed, click on ALLOW USERS TO LOG ON. The status message will now state, "Users are allowed to log on."

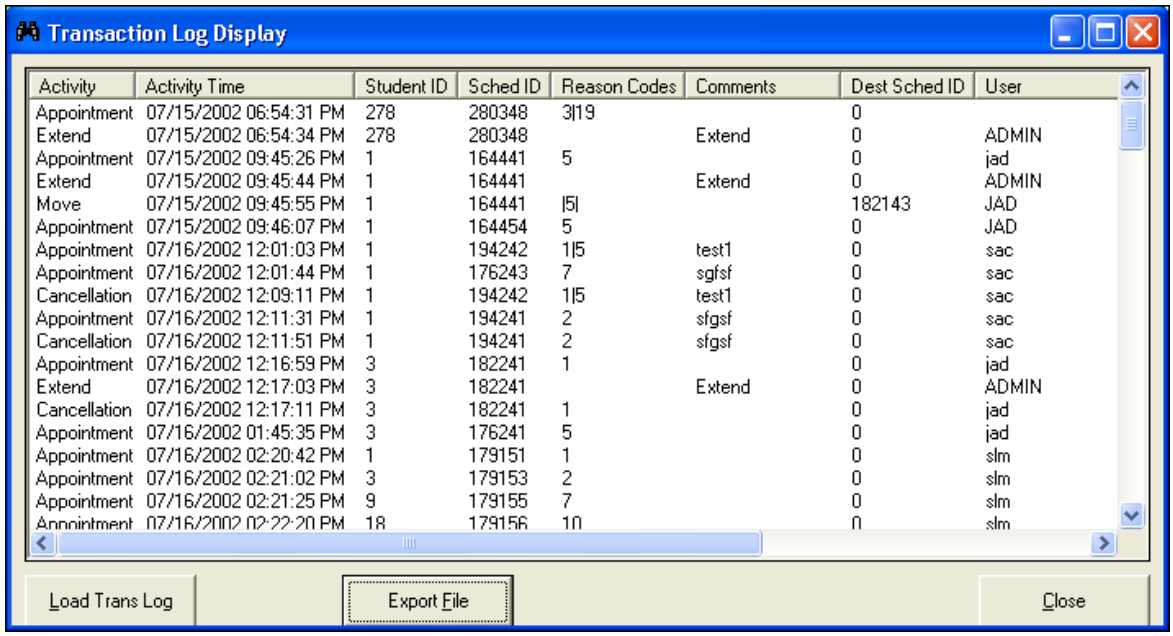
6. Click on CLOSE.

50.2 Transaction Log

The Transaction Log stores a backup copy of all appointment transactions. Computer support staff should use the Transaction Log (Translog.txt) in conjunction with the backup to rebuild the SARS Database in the event that it is unusable. Because the data is encrypted, the Transaction Log is needed to display the data in an unencrypted format.

It is located in C:\Program Files\SARSGrid.

Here is an example of the screen:



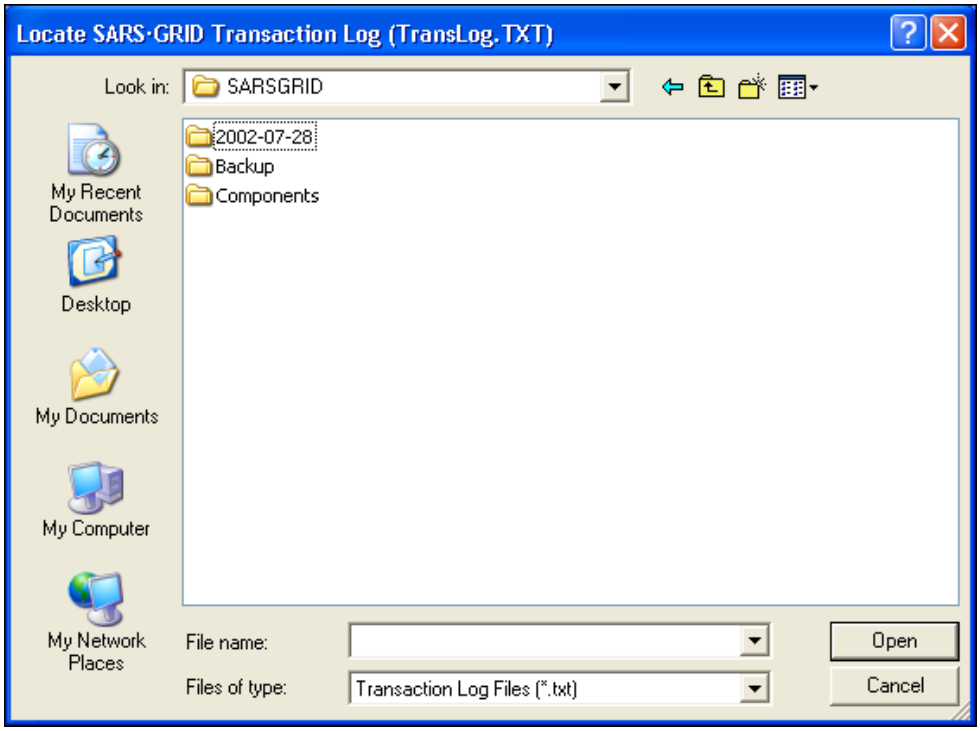
Activity	Activity Time	Student ID	Sched ID	Reason Codes	Comments	Dest Sched ID	User
Appointment	07/15/2002 06:54:31 PM	278	280348	3|19		0	
Extend	07/15/2002 06:54:34 PM	278	280348		Extend	0	ADMIN
Appointment	07/15/2002 09:45:26 PM	1	164441	5		0	jad
Extend	07/15/2002 09:45:44 PM	1	164441		Extend	0	ADMIN
Move	07/15/2002 09:45:55 PM	1	164441	|5|		182143	JAD
Appointment	07/15/2002 09:46:07 PM	1	164454	5		0	JAD
Appointment	07/16/2002 12:01:03 PM	1	194242	1|5	test1	0	sac
Appointment	07/16/2002 12:01:44 PM	1	176243	7	sgfsf	0	sac
Cancellation	07/16/2002 12:09:11 PM	1	194242	1|5	test1	0	sac
Appointment	07/16/2002 12:11:31 PM	1	194241	2	sfgsf	0	sac
Cancellation	07/16/2002 12:11:51 PM	1	194241	2	sfgsf	0	sac
Appointment	07/16/2002 12:16:59 PM	3	182241	1		0	jad
Extend	07/16/2002 12:17:03 PM	3	182241		Extend	0	ADMIN
Cancellation	07/16/2002 12:17:11 PM	3	182241	1		0	jad
Appointment	07/16/2002 01:45:35 PM	3	176241	5		0	jad
Appointment	07/16/2002 02:20:42 PM	1	179151	1		0	slm
Appointment	07/16/2002 02:21:02 PM	3	179153	2		0	slm
Appointment	07/16/2002 02:21:25 PM	9	179155	7		0	slm
Appointment	07/16/2002 02:22:20 PM	18	179156	10		0	slm

The options are:

- LOAD TRANS LOG: Use to obtain a list of all appointment transactions to be displayed in the TRANSACTION LOG DISPLAY screen.
- EXPORT FILE: Use to transfer the appointment transactions to a separate file for use in re-building a damaged database.
- CLOSE: Use to exit the screen.

Before proceeding, contact SARS Software Products, Inc.

1. Start TransLogView.exe. A blank TRANSACTION LOG DISPLAY screen will be displayed.
2. Click on LOAD TRANS LOG. A screen will be displayed asking you to locate the SARS·GRID Transaction Log. Here is an example:



   a. Click on LOOK IN ▼ and then select the folder that contains the SARS·MENU.

   b. Click on FILE NAME ▼ and then select Translog.txt.

   c. Click on OPEN. The text file will be opened into the TRANSACTION LOG DISPLAY screen.

3. Click on EXPORT FILE. The following screen will be displayed:

4. Click on YES. The following message will be displayed:

5. Click on OK. The data will be saved to a text file containing the date of the export. The following is an example: SE020831.txt. The file will be saved in the same location as the Transaction Log file.

6. Click on CLOSE on the TRANSACTION LOG DISPLAY screen.

SECTION 51 – ACCESS TO DATABASES

51.1 Database Access to Microsoft Access™

You may wish to obtain access to the SARS Database from Microsoft Access™ for reporting purposes rather than using SARS·EXCHANGE. Your computer specialist may contact SARS Software Products, Inc. for assistance.

51.2 Database Access to Additional SARS Databases

Although most colleges use only one SARS database, some colleges establish separate SARS databases for confidentiality or other purposes. When appropriate, a user may be given access to more than one SARS database. This is achieved by modifying options on the individual workstation for the person who is to be permitted access to more than one database.

1. The Information Technology staff person logs in to SARS·GRID from the workstation to be modified and performs the following actions:

    a. From the SARS·GRID menu, press **Alt+B** simultaneously to display an ADD DATABASE screen. The screen will display a list of current databases to which the user of that workstation has access.

    b. Click on ADD to display the Locate Database Configuration File screen.

    c. Click on the DSN file name which points to the database to which the user will be given access.

    d. Click on OPEN. The selected database file will be displayed on the listed of configured databases on the ADD DATABASE screen.

    e. Click on CLOSE.

2. The workstation user now clicks on the SARS·GRID icon. A menu will be displayed asking the user to select the desired SARS database.

    a. Click on the desired database.

    b. Click on OK. The user will be prompted to proceed to log in to SARS·GRID.

SECTION 52 – INSTALL THE EMAIL WEB SERVICE

52.0 Overview

Section 4.5.8 provides instructions for configuring the ALLOW EMAIL RECEIPT option on the MISCELLANEOUS SETTINGS tab. If the school allows users at individual workstations to send emails from their computers without restrictions, they can use SMTP server. However, if the school does not allow individual workstations to send email via the SMTP server, a separate program may be installed and configured to bypass that server. This program is called the SARS·GRID Email Web Service.

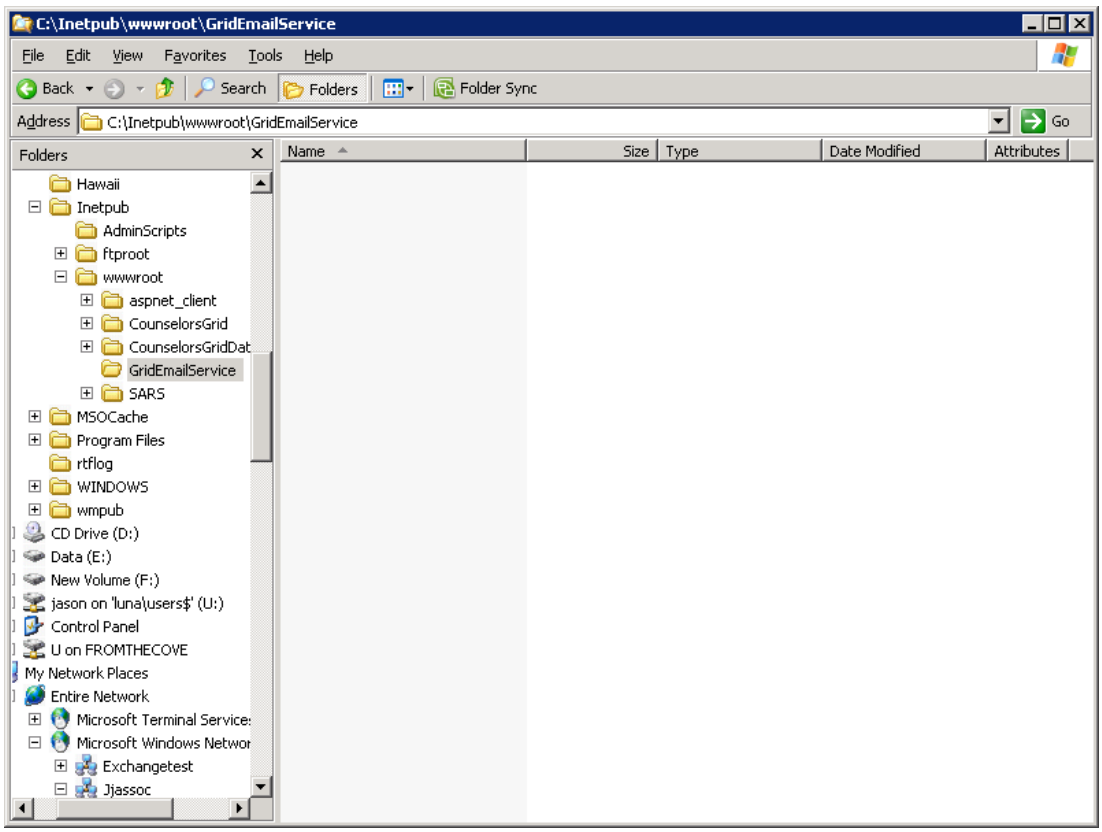
To install the SARS·GRID Email Web Service, the server must be running IIS 6.5 or later, the SMTP Server must be able to send email from the GRID File Server, and the system must have ASP.Net 2.0 installed.

52.1 Installation Guide

Upon request, SARS Software Products, Inc. will send the program files to the school to be installed as follows:

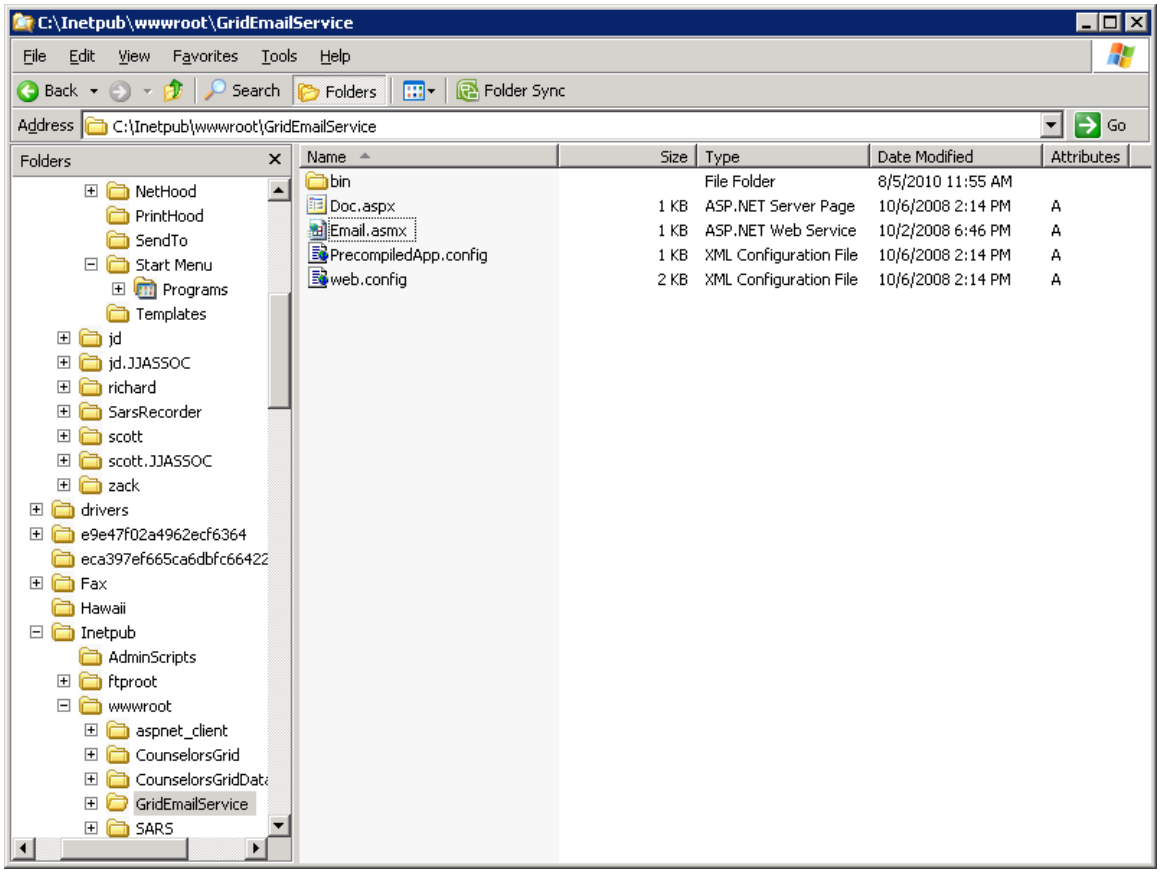
1. Open the X:\Inetpub\wwwwroot directory.

2. Create a new folder (e.g., GridEmailService) in this directory. Here is an example:



3. Copy all of the files provided by SARS Software Products, Inc. to this new folder.

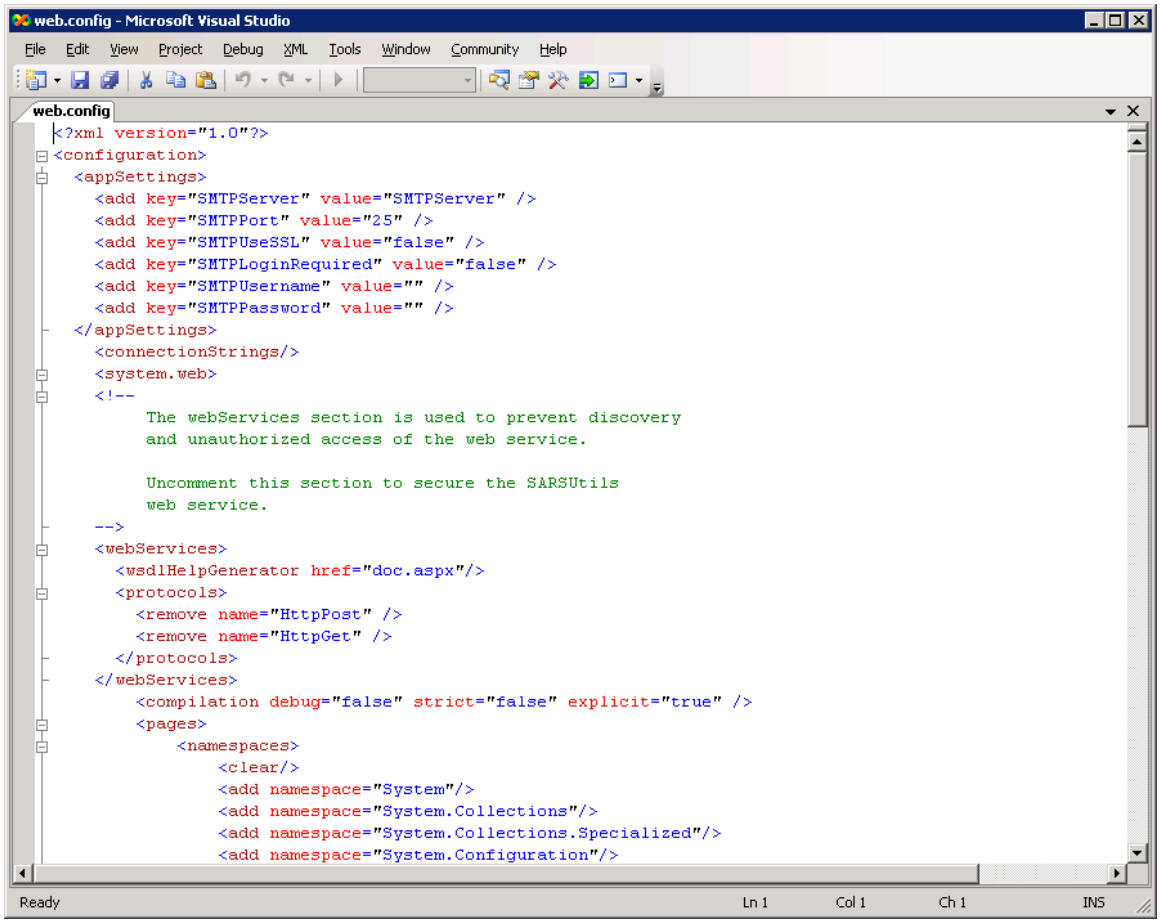
Here is an example of the files that will be copied:



4. Edit the web.config file by opening <configuration> and then below <appSettings> type in the following entries:

```
<add key="SMTPServer" value="SMTPServer" />
<add key="SMTPPort" value="25" />
<add key="SMTPUseSSL" value="false" />
<add key="SMTPLoginRequired" value="false" />
<add key="SMTPUsername" value="" />
<add key="SMTPPassword" value="" />
```

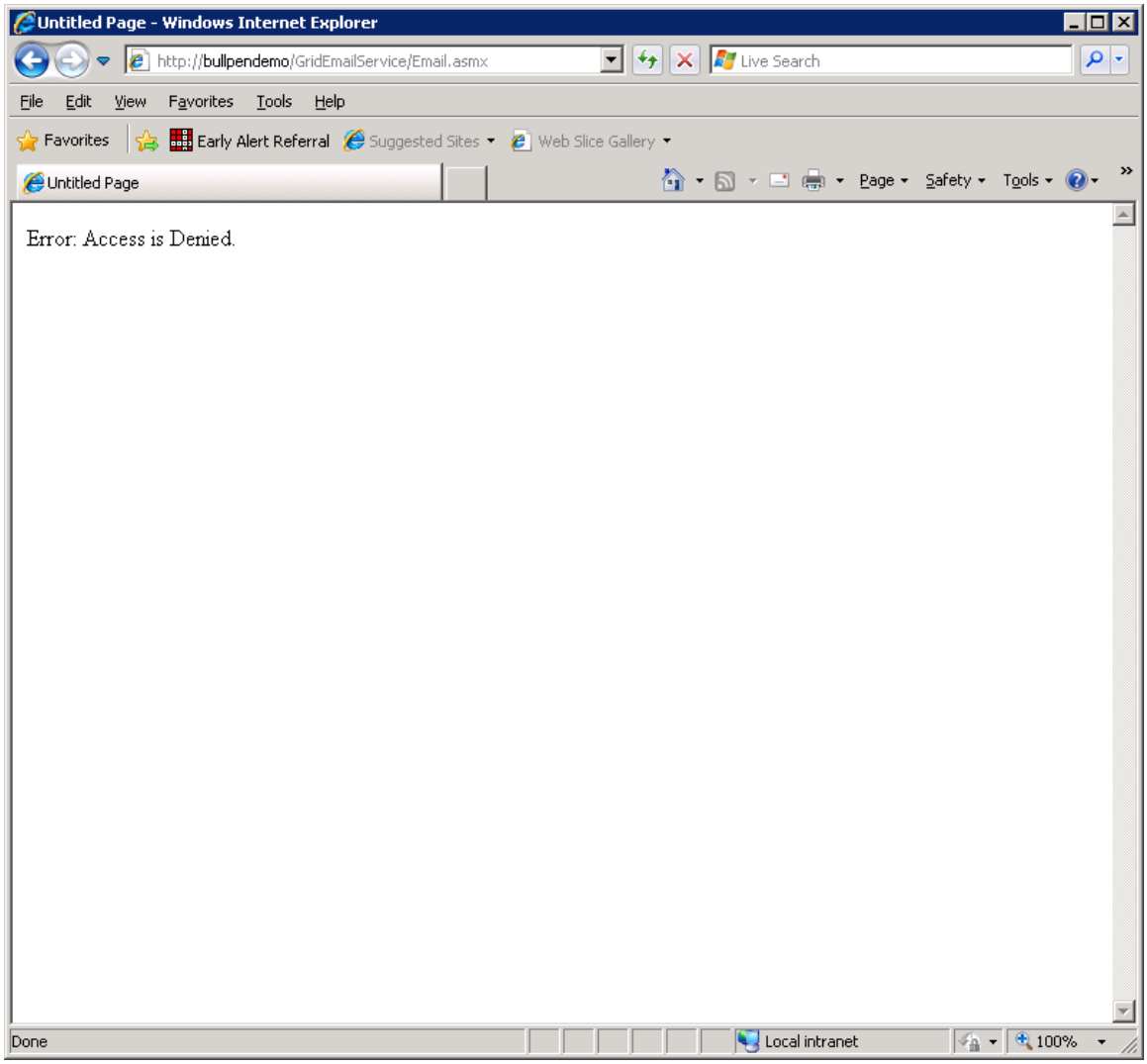

Here is an example when done:



52.2 Test the Settings

After installation, the URL (ex: http://webserver/GridEmailService) should be tested. If the URL works, the following message will be displayed on the page: "Error: Access is Denied." This is the desired message.

Here is an example:



1. Select and copy the URL, which will be pasted into the Mail Service URL field on the Email Configuration screen within SARS·GRID.

2. From an individual client workstation PC,

   a. Open SARS·GRID and sign on as an administrator.

   b. Click on SARS·UTIL.

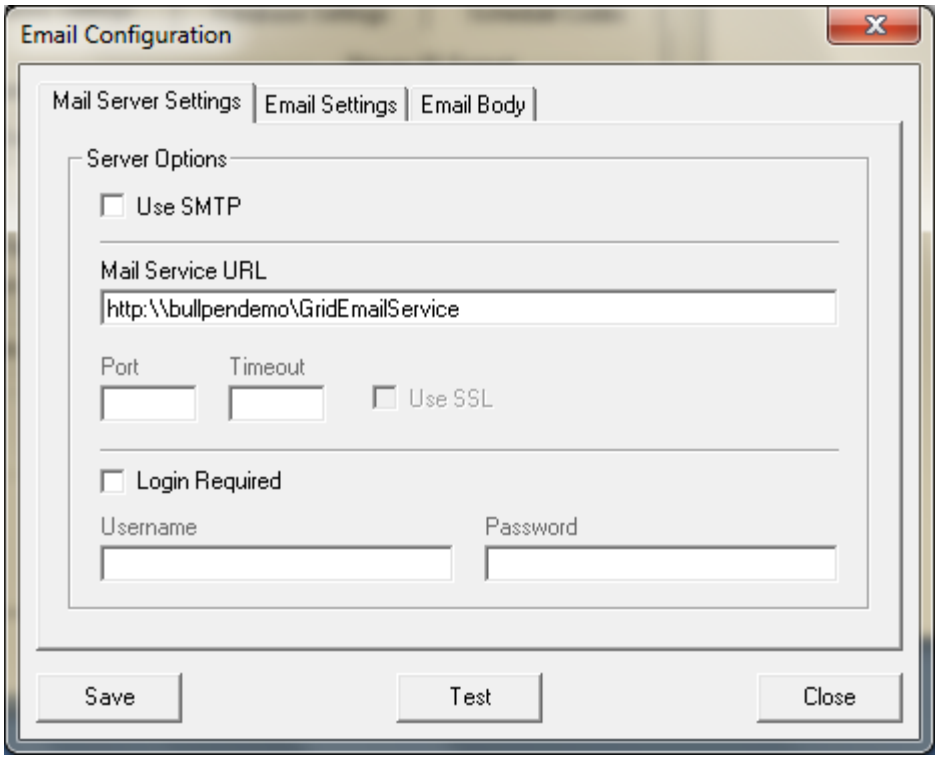
   c. Click on SYSTEM ADMINISTRATION.

   d. Click on LOCATION MAINTENANCE and select any Location.

   e. Click on PROPERTIES.

   f. Click on the MISCELLANEOUS SETTINGS tab.

g. Click on ALLOW EMAIL RECEIPT and then click on the adjacent CONFIGURE button. This will display an EMAIL CONFIGURATION screen. Here is an example:



h. Paste the URL into the MAIL SERVICE URL field as shown in the example above.

Note
The following fields will not be used when using the Mail Service URL: Use SMTP, Port, Timeout, and Use SSL.

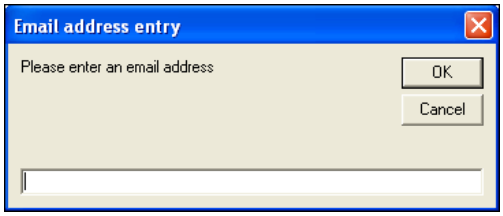
i. If users will be required to login to use the email feature, click on the LOGIN REQUIRED checkbox. Then,

   i) Click on the USERNAME field and type in the specific Username of the authorized user for the email feature.

   ii) Click on PASSWORD field and type in the specific Password of the authorized user for the email feature.

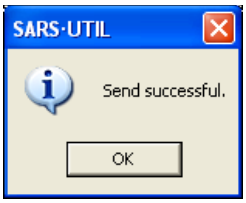
j. Click on SAVE.

k. To test the message settings, click on TEST to display an Email address entry screen. Here is an example:



l. Type in the email address of the individual who will be receiving the test message.

m. Click on OK. If the message is sent successfully, the following message will be displayed.



n. Click on OK.

o. Open your email inbox and retrieve the test message. If the results are satisfactory, return to the EMAIL CONFIGURATION screen and click on CLOSE to return to the MISCELLANEOUS SETTINGS screen.

Note
The test email message is hard-coded to display the following values for the embedded options. They are:

Date:	The date on which the test is sent.
Time:	The time at which the test is sent.
Counselor:	Email Test
Room:	100-B
Duration:	30 minutes.
Reasons:	Advising, ED plan

3. The configuration in Step 2, above, may be performed on any computer that is using SARS·GRID for the selected Location. When configured, all other computers that use the selected Location will be affected. Repeat Step 2 for every other location.

4. When done, click on CLOSE and exit SARS·GRID.

This completes the installation portion of the SARS·GRID Email Web Service. To continue to configure the email settings for each individual Location, refer to Part I, Section 4.5.8(8.b).

SECTION 53 – GOTOASSIST

53.0 Request Technical Assistance from SARS Software Products, Inc.

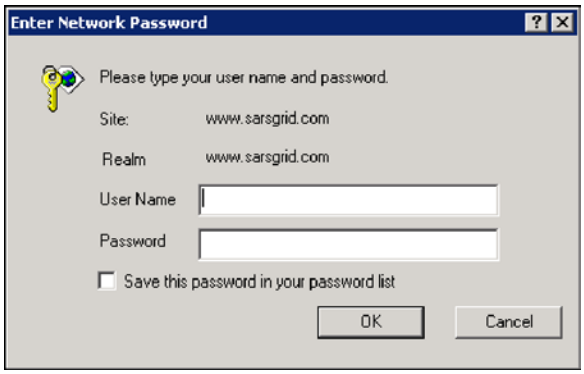
GoToAssist is the method used by SARS Software Products, Inc. to assist clients resolve system problems online. GoToAssist may be initiated only when the school logs onto www.sarsgrid.com and requests Product Support. You may stand by to observe the actions taken by our representative to resolve your problem.

1. First call SARS Software Products, Inc. at (415) 226-0040 to request assistance.

2. When instructed to do so, log onto the Internet using Internet Explorer, Netscape or Firefox.

3. Go to www.sarsgrid.com.

4. Click on ONLINE SUPPORT in the upper right-hand area of the screen. A screen will be displayed that looks like this:



5. You will be asked to enter a network user name and password. The user name and password are both in lower case.

6. After entering the User Name and Password, click on OK.

7. In a few moments, a message will ask if something may be downloaded. This is a safe, virus-free program that will be placed in your temporary directory.

   a. [Internet Explorer] When prompted, click on YES to start the download. (If the download does not start, click on the CLICK HERE button to download the link on the web page. When prompted, select RUN for its current location.)

   -or-

   b. [Netscape] When prompted, click on GRANT to start the download. You will be asked to do this twice.

   -or-

   c. [Firefox] Skip to step 8, below.

8. In a few moments, a program called Chat Link will pop up on the screen. Wait.

9. When you are asked permission for an agent to see your screen, make sure that anything you do not wish the SARS Software Products, Inc. agent to see on the screen is minimized or closed; then click on OK.

10. A representative from SARS Software Products, Inc. will now be able to view and work on your computer as if he were there. To prevent “mouse wars,” refrain from using the mouse until the support actions are completed. Be reassured that any time you wish to lock out our representative. all you have to do is move your mouse.

11. After you are advised that Customer Support has disconnected from your computer, close the web browser and log off the Internet.

APPENDICES

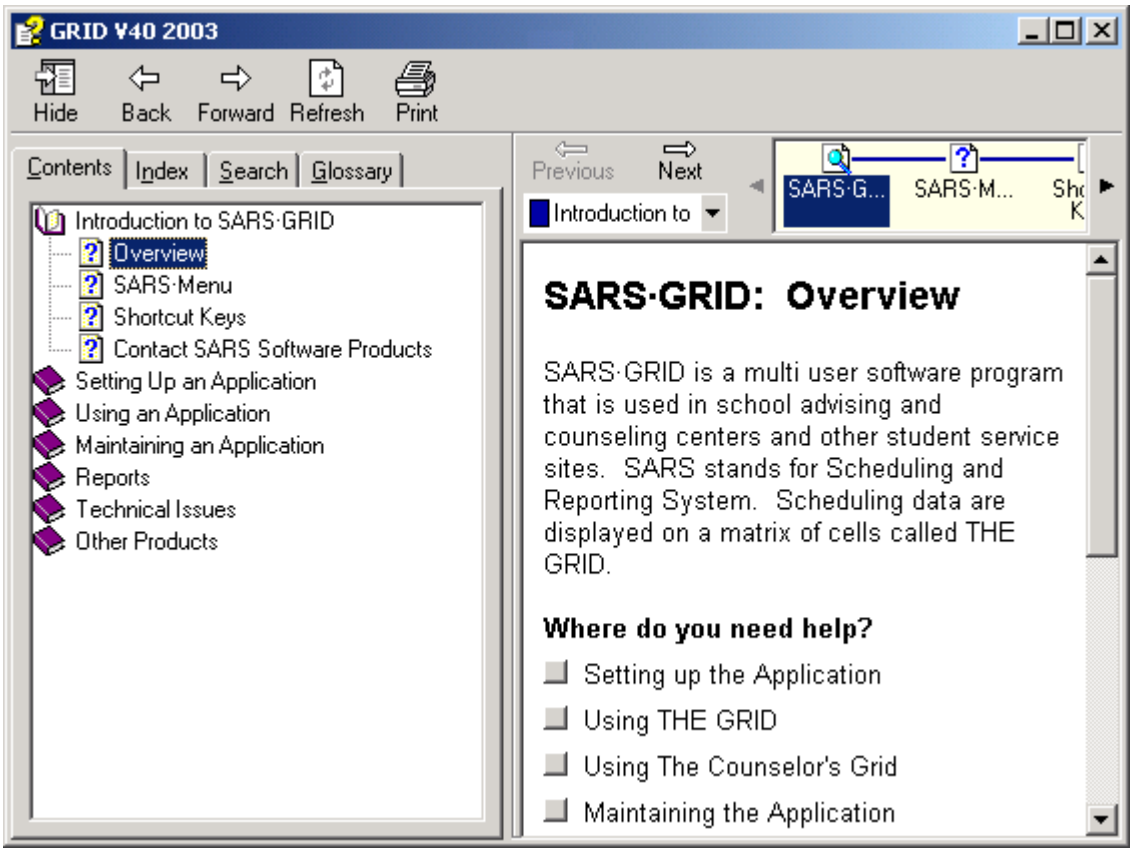
APPENDIX A — HELP FILE

The Help feature is a convenient and quick way to obtain more information about SARS·GRID topics. There are four ways to use the Help feature: Contents, Index, Search, and Glossary.

▶Contents

1. Press F1 from any SARS·GRID screen to display the Help options.

   Here is an example:



2. Click on the CONTENTS tab to display books representing a table of contents.
3. Double-click on the book containing the topic of your choice. Other books may appear.
4. Continue to double-click on the desired book(s) until a list of topics is displayed.
5. Click on the desired topic to display the information in the right-hand pane.
6. Click on the X at the upper right of the screen to close the Help feature.

▶Index

1. Press F1 from any SARS·GRID screen to display the Help options.
2. Click on the INDEX tab to display an alphabetized comprehensive list of topics.
3. Scroll to find the topic or type the first few letters of the topic for which you are seeking information.
4. Click on the selected topic.
5. Click on DISPLAY to view the desired information.
6. Click on the X at the upper right of the screen to close the Help feature.

▶Search

1. Press F1 from any SARS·GRID screen to display the Help options.
2. Click on the SEARCH tab.
3. Type the word for which you are seeking information. A list of all topics containing that word will be displayed.
4. Click on the selected topic.
5. Click on DISPLAY to view the desired information.

   Tip
   To remove the highlight blocks from help search word hits, click on the REFRESH button at the top of the screen.

6. Click on THE X in the upper right-hand corner to close the Help screen.

▶Glossary

1. Press F1 from any SARS·GRID screen to display the Help options.
2. Click on the GLOSSARY tab.
3. Click on the desired word to display its definition in the lower-pane
4. Click on THE X in the upper right-hand corner to close the Help screen.

APPENDIX B – DATE PICKER

Whenever a Date field has a down arrow ▼ feature, a date can be selected for that field in various ways:

1. Disregard the Down Arrow ▼. Instead, type in the desired date by placing the cursor on the day (it will be highlighted) and then type in the change. Repeat that action for the date and year. Specifically, you can:

   a. Click on the displayed month and type the number representing the desired month.

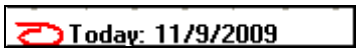
   b. Then click on the displayed day and type the number representing the desired day.

   c. Then click on the displayed year and type the number representing the desired year.

--or—

2. Click on the Down Arrow ▼ to display a popup Date Picker calendar. Here is an example:

Note that today's date is represented at the bottom of the calendar. Here is an example:



   a. To insert <u>today's date</u>, click on the "today" line. That date will be inserted in the date field.

   b. To insert <u>any other date</u> that is displayed on the calendar, click on that date to insert it.

   c. To display a <u>previous month</u>, click on the Left Arrow ◄ and click on the desired date.

   d. To display a <u>future month</u>, click on the Right Arrow ► and click on the desired date.

e. To display a list of all twelve months of the current year, click on the name of the month at the top of the calendar.

Here is an example of the drop down list that will be displayed:

Then click on the desired month to display the calendar for that month.

f. Click on the year at the top of the calendar. An Up Arrow ▲ and a Down Arrow ▼ will be displayed. Here is an example:

(i) Click on the up arrow ▲ to display the same month in the next year.

(ii) Click on the down arrow ▼ to display the same month in the previous year.

APPENDIX C — ACCESSIBILITY FEATURES FOR THE DISABLED

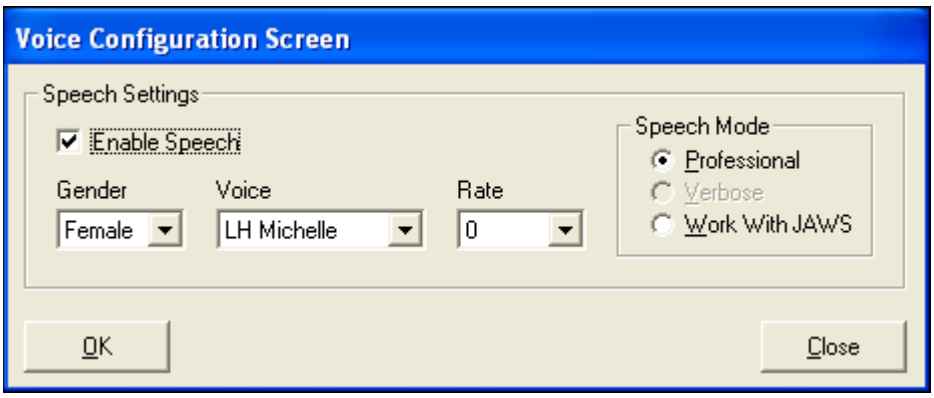
Text to Speech Options for the Visually Impaired

The SARS·GRID application contains an embedded text to speech component that may be configured on the computer that is being used by a disabled individual for that individual's logon name and password. The text to speech feature is available for all functions within the following SARS·GRID features: SARS·MENU, THE GRID, MY GRID, and the DROP-IN SCREEN.

To activate the text to speech feature, follow the steps below:

1. Logon to SARS·GRID using the disabled individual's User Name and Password. The SARS·MENU will be displayed.

2. Press **F6** to display a VOICE CONFIGURATION SCREEN. Here is an example:



The options are:

- SPEECH SETTINGS:

ENABLE SPEECH:	Use to turn on the text to speech component.
GENDER:	Use to select either a Female or a Male voice.
VOICE:	Use to select a specific voice. The choices are dependent on the voices that are installed on the system. Other options may be downloaded from Microsoft free of charge.
RATE:	Use to select the tempo at which the voice will speak the information. The default is 0 and the range is –10 to +10. The negative rates are slower and the positive rates are faster.

- SPEECH MODE:

PROFESSIONAL:	Use to speak all information on the screen.
VERBOSE:	[Currently disabled] Use for novices who may require additional explanations of each feature.

WORK WITH JAWS:	[Optional] Use in addition to existing JAWS software, if desired. If this option is selected, SARS will speak only those items that JAWS does not speak.
• OK:	Use to save the entries made on the screen.
• CLOSE:	Use to exit the screen.

3. Click on the ENABLE SPEECH checkbox.

4. Click on GENDER ▼and select either FEMALE or MALE.

5. Click on VOICE ▼ and select the specific voice to be used.

Note The choices are dependent on the voices that are installed on the system. Other options may be downloaded from Microsoft free of charge.

6. In SPEECH MODE, click on PROFESSIONAL to have the system speak all information displayed on the screen,

   -or

   [Currently disabled] Click on VERBOSE to have the system speak all information displayed and additional explanations of each feature. (Useful for novices.)

   -or-

   Click on WORK WITH JAWS to use the SARS text to speech feature in addition to an existing JAWS module. In this mode, SARS will speak only those items that JAWS does not speak.

7. Click on OK to store the selections.

8. Click on CLOSE to exit the screen.

All functions can be performed using the keyboard by using the TAB, ENTER, and ARROW keys, as well as the Shortcut Keys (use **Alt-K** to display all Shortcut Key options). Other keyboard features may be enhanced using the Microsoft accessibility features.

Large Text Size Options for the Visually Impaired

THE GRID and MY GRID may be configured to display text in large print on the computer that is being used by a disabled individual for that individual's logon name and password.

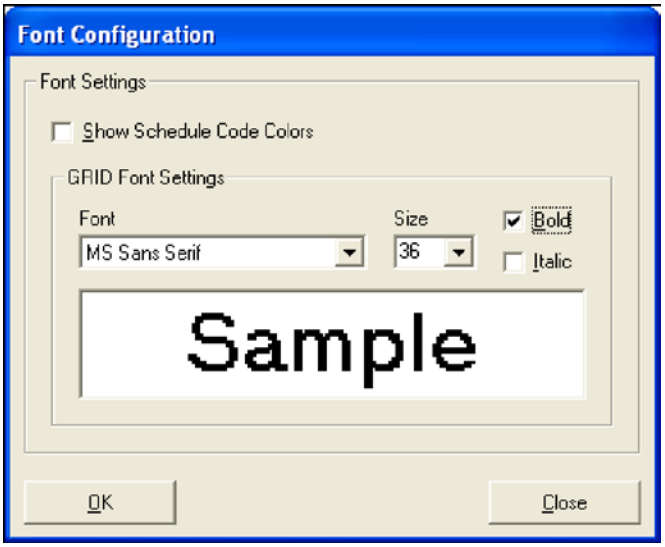
► To set up this configuration for THE GRID, follow the steps below:

1. Logon to SARS·GRID using the disabled individual's User Name and Password.

2. From the SARS·MENU, click on THE GRID.

3. Press **F6** to display a FONT CONFIGURATION screen.

Here is an example:



The options are:

- SHOW SCHEDULE CODE COLORS: Use to select or de-select the option to display the assigned Schedule Code colors on THE GRID. Selecting color-codes may facilitate viewing of different activities. De-selecting this option activates the GRID FONT SETTINGS panel options, which enables visually-impaired users to select a larger font.
- GRID FONT SETTINGS:

  FONT: Use to select the desired Font to be displayed on THE GRID.

  SIZE: Use to select the size of the selected font.

  BOLD: Use to display the text in **Bold** on THE GRID.

  ITALIC: Use to display the text in *Italics* on THE GRID.
- OK: Use to save the entries made on the screen.
- CLOSE: Use to exit the screen.

4. If SHOW SCHEDULE CODE COLORS is checked, click on the checkbox to de-select that option. This action will enable the GRID FONT SETTINGS panel.
5. Click on FONT ▼ and select the desired font.
6. Click on SIZE ▼ and select the desired size for the font.
7. [Optional] Click on BOLD to display text in **BOLD**.
8. [Optional] Click on ITALIC to display text in *ITALICS*. The Sample displays the appearance based on the options selected.

9. Click on OK to store the selections.

10. Click on CLOSE to exit the screen.

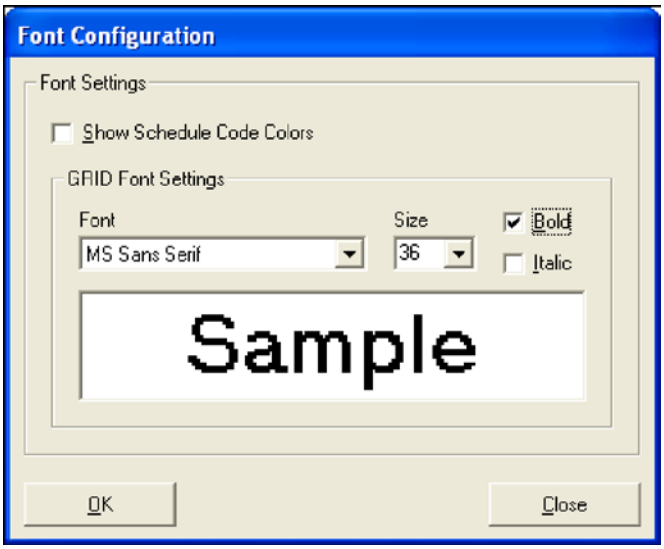
▶ To set up this configuration for MY GRID, follow the steps below:

1. Logon to SARS·GRID using the disabled individual's User Name and Password.

2. From the SARS·MENU, click on MY GRID.

3. Press **F6** to display a CONFIGURATION SCREEN.

4. Click on FONT CONFIGURATION to display a FONT CONFIGURATION screen. Here is an example:



The options are:

- SHOW SCHEDULE CODE COLORS: Use to select or de-select the option to display the assigned Schedule Code colors on MY GRID. Selecting color-codes may facilitate viewing of different activities. De-selecting this option activates the GRID FONT SETTINGS panel options, which enables visually-impaired users to select a larger font.

- GRID FONT SETTINGS:

  FONT: Use to select the desired Font to be displayed on MY GRID.

  SIZE: Use to select the size of the selected font.

  BOLD: Use to display the text in **Bold** on MY GRID.

  ITALIC: Use to display the text in *Italics* on MY GRID.

- OK: Use to save the entries made on the screen.

- CLOSE: Use to exit the screen.

5. If SHOW SCHEDULE CODE COLORS is checked, click on the checkbox to de-select that option. This action will enable the GRID FONT SETTINGS panel.

6. Click on FONT ▼ and select the desired font.

7. Click on SIZE ▼ and select the desired size for the font.

8. [Optional] Click on BOLD to display text in **BOLD**.

9. [Optional] Click on ITALIC to display text in *ITALICS*. The Sample displays the appearance based on the options selected.

10. Click on OK to store the selections.

11. Click on CLOSE to exit the screen.

All functions can also be performed using the keyboard by using the TAB, ENTER, and ARROW keys, as well as the Shortcut Keys (use **Alt-K** to display all Shortcut Key options). Other keyboard features may be enhanced using the Microsoft accessibility features.

Keyboard Interface for the Manually Impaired

SARS·GRID may be navigated without using a mouse. All functions can be performed using the keyboard by using the TAB, ENTER, and ARROW keys, as well as the Shortcut Keys (use **Alt-K** to display all Shortcut Key options). Other keyboard features may be enhanced using the Microsoft accessibility features.

APPENDIX D – PRACTICE EXERCISES FOR SCHEDULERS

Navigate THE GRID and Schedule an Appointment (Type: Individual)
(Reference: *Quick Guide for Schedulers*, Sections 9.0, and 19.1)

Exercise A: A student requests an appointment for tomorrow with any advisor. Use F3 to assist you in navigating to the date. Then schedule the appointment.

Exercise B: A student requests an appointment for one week from today with any advisor. Use DISPLAY MODE BY DATE to assist you in scheduling this appointment.

Exercise C: A student requests an appointment for any morning within the next two weeks with a specific advisor. Use DISPLAY MODE BY ADVISOR to assist you in scheduling this appointment.

Exercise D: A student requests any appointment, but does not know his/her ID. The student also requests an appointment receipt. Use the SEARCH button on the STUDENT APPOINTMENT screen. Ensure that the PRINT RECEIPT box and/or the EMAIL RECEIPT box is checked when scheduling the appointment.

Exercise E: A student requests any appointment, but declines an appointment receipt. Ensure that the PRINT RECEIPT box is unchecked when scheduling this appointment. The student subsequently requests an appointment receipt. Use REPRINT RECEIPT to satisfy the student's request.

Change a Scheduled Appointment
(Reference: *Quick Guide for Schedulers*, Section 19.5)

Exercise A: A student requests an appointment for next week with a specific advisor. After committing the appointment, you realize your mistake in scheduling the appointment for the wrong date and desire to make the correction. Move the scheduled appointment.

Exercise B: A student telephones to advise you of his/her unavailability for an appointment. As you begin to move the appointment to a later time, the student decides to retain rather than reschedule the appointment. Cancel the move.

Exercise C: A student requests that an appointment be rescheduled. After moving the appointment to the requested time slot but before leaving the MOVE CONFIRMATION screen, the student decides that another time is better. Move the scheduled appointment to the next time.

Search for an Available Appointment
(Reference: *Quick Guide for Schedulers*, Section 19.3)

Exercise: A student requests an appointment within the next two weeks with a specific advisor. Use the SEARCH option on the Command Menu to assist you in scheduling the appointment.

Cancel an Appointment (Type: Individual)
(Reference: *Quick Guide for Schedulers*, Section 19.1.1)

Exercise A: A student is unable to attend an appointment. Cancel the appointment.

Exercise B: In response to a student's request, cancel the appointment. You immediately realize your mistake in canceling the wrong appointment. Use the UNDO function to restore the appointment to THE GRID.

Schedule an Appointment (Type: Group)
(Reference: *Quick Guide for Schedulers*, Section 19.1)

Exercise A: Two students wish to attend the next available orientation for new students. Schedule both students to attend the same orientation.

Exercise B: Print a list of students who are scheduled to attend the orientation.

Cancel an Appointment (Type: Group)
(Reference: *Quick Guide for Schedulers*, Section 19.1.2)

Exercise: Due to illness, one student is unable to attend the orientation for new students. Cancel that appointment.

Use the Student History Screen
(Reference: *Quick Guide for Schedulers*, Section 15.1, 15.2)

Exercise A: Review the appointment history for a student whose ID does not appear in an appointment cell. Search for the student by name.

Exercise B: Review the appointment history for a student whose ID does not appear in an appointment cell. Search for the student by ID.

Record Attendance - (Appointment Type: Individual)
(Reference: *Quick Guide for Schedulers*, Section 20.1)

Exercise: Record that a student has attended a scheduled appointment.

Reminders: While not practical for this exercise session, you may use the QUICK DAY ATTEND command to record the attendance for several students in one step. Also, you may record a student's attendance at a group appointment.

Modify and Delete an Alert
(Reference: *Quick Guide for Schedulers*, Sections 22.1 – 22.4)

Exercise A: Add an alert about a student whose ID appears in an appointment cell.

Exercise B: Add an alert about a student whose ID does not appear in an appointment cell.

Exercise C: Schedule an appointment for one of the students for whom an alert was entered in the previous exercise. Delete the alert that you receive while scheduling this appointment.

Use the Drop-in Screen
(Reference: *Quick Guide for Schedulers*, Sections 22.1 – 22.4)

Exercise A: Two students are seeking drop-in assistance. Add the students to the drop-in list.

Exercise B: Assign the first student on the drop-in list to the next available advisor.

Exercise C: You call the next student on the waiting list. The student does not respond. Record the time that you called the student in the Comments field.

Exercise D: You subsequently call the student again. The student does not respond. Delete the student from the list.

Change an Advisor's Schedule
(Reference: *Quick Guide for Schedulers*, Sections 8.0 – 8.8)

Exercise A: An advisor has informed you of his/her unavailability for appointments from 8:30 – 10:00 a.m. one day this week due to a meeting. Change the advisor's schedule using the QUICK DAY CHANGE command. Remember to record the type of meeting and its location.

Exercise B: An advisor has informed you of his/her unavailability for appointments for one day next month due to a conference. Change the advisor's schedule using the CHANGE COLUMN command.

Reminder: You may also change part of a column using the CHANGE COLUMN command or reset an entire column back to the original Schedule Codes on the advisor's master schedule for that day of the week.

Exercise C: An advisor will arrive at work next Wednesday one-half hour earlier than scheduled in order to prepare for a meeting. Change the advisor's schedule using the CHANGE SCHEDULE CODE screen.

Reminder: You may schedule multiple, recurring meetings for one advisor simultaneously using the RECURRING ACTIVITIES screen.

APPENDIX E – PRACTICE EXERCISES FOR ADVISORS

Change an Advisor's Password (Reference: *Quick Guide for Advisors*, Section 3.2)
Exercise: Change your password. Remember to type CHANGE in the password field.

Change the Display of MY GRID (Reference: *Quick Guide for Advisors*, Section 10.1)
Exercise: Remove and rearrange columns on your own Grid as desired. Press F6 to display the Configuration Screen.

View and Print an Advisor's Schedule (Reference: *Quick Guide for Advisors*, Sections 10.1, 10.2, and 10.4)
Exercise A: View your schedule for tomorrow. Use F3 to assist you in navigating. **Exercise B:** Print your schedule for today. **Exercise C:** View your schedule for several days. Use the Multiple Dates display mode option. **Exercise D**: Print your schedule for several days.

Add a Note (Reference: *Quick Guide for Advisors*, Section 26.2)
Exercise A: Add a note about a student whose ID appears in an appointment cell on MY GRID. In order to perform this function, you will need to have a scheduled appointment. **Exercise B:** Add a note about a student whose ID does not appear in an appointment cell on MY GRID. Search for the student by name. **Exercise C:** Add a note about a student whose ID does not appear in an appointment cell on MY GRID. Search for the student by ID.

Print a Note (Reference: *Quick Guide for Advisors*, Section 26.2)
Exercise A: Print one of the notes that you just recorded. **Exercise B:** Print all of the notes written about one student.

Add and Delete an Alert
(Reference: *Quick Guide for Advisors*, Sections 29.1 - 29.4)

Exercise A: Add an alert about a student whose ID appears in an appointment cell on MY GRID.

Exercise B: Add an alert about a student whose ID does not appear in an appointment cell on MY GRID.

Exercise C: Delete the alert that you receive while adding a note about a student. In order to perform this exercise, add a note about the student for whom an alert was entered in the previous exercise.

Record/Update Reasons for an Appointment
(Reference: *Quick Guide for Advisors*, Section 28.1)

Exercise: You have just completed an advising session with a student. The student needed assistance with more issues than he/she specified when making the appointment. Update the list of reasons why the student sought assistance.

Use Student History
(Reference: *Quick Guide for Advisors*, Sections 15.0 – 15.2)

Exercise A: Verify that the appointment attendance recorded in the previous exercise has been recorded on the STUDENT HISTORY screen.

Exercise B: Review the appointment history for a student whose ID does not appear in an appointment cell. Search for the student by name.

Exercise C: Review the appointment history for a student whose ID does not appear in an appointment cell. Search for the student by ID.

Record the Number of Additional Contacts
(Reference: *Quick Guide for Advisors*, Section 32.1 – 32.2)

Exercise: While in the cafeteria, you were stopped by three students who were seeking advice. Record the number of contacts under the applicable category.

Record Appointment Attendance
(Reference: *Quick Guide for Advisors*, Section 33.1)

Exercise: Record that a student has just attended an appointment. In order to perform this exercise, you will need to have an appointment scheduled for today.

Use the Drop-in Screen
(Reference: *Quick Guide for Advisors*, Sections 27.1, 27.2 and 27.3)

Exercise A: You are assigned to drop-in duty. Assign yourself the next student on the Drop-in List.

Exercise B: You have completed your session with the student. Record the reasons why the student sought advice.

Exercise C: You have completed your session with the student. Add a note that summarizes what transpired during the session.

Reminder: Your default settings for the Drop-in screen may be set to: pre-set a reason, display reasons on the screen, view minutes since check-in rather than check-in time, hide confirmation messages, pre-set a reason, and limit the choice of reasons for selection. See your SARS·GRID System Administrator for assistance..

Change an Advisor's Schedule
Reference: *Quick Guide for Advisors*, Sections 8.1, 8.2, 8.3. 8.4, 8.5, and 8.6)

Exercise A: You will be unavailable for appointments until noon tomorrow due to a budget meeting. Change your schedule using the QUICK DAY CHANGE command. Remember to record the type of meeting and its location.

Exercise B: You will be unavailable for appointments for one day next month due to a conference. Change your schedule using the CHANGE COLUMN command.

Reminder: You may also change part of a column using the CHANGE COLUMN command or reset an entire column back to the original Schedule Codes on your master schedule for that day of the week.

Reminder: You may schedule multiple, recurring meetings simultaneously using the RECURRING ACTIVITIES screen.

Build an Advisor's Master Schedule
Reference: *Quick Guide for Advisors*, Sections 6.1, 6.2, 6.3. 6.4, 6.5, 6.6, 6.7, and 6.8

Exercise A: You are exclusively on drop-in duty the first three weeks of the fall term. Record your master schedule template. Use the Copy Column feature to assist you in recording your schedule. For classes or meetings that recur weekly, record specific information (class name, meeting topic, and location) in Comments.

Exercise B: You have appointments as well as drop-ins for the remainder of the fall term. Create another template. Depending upon the similarity of your schedule, either add a blank template and record your schedule or add a template based on another template and edit accordingly.

Reminder: If your schedule for the spring term is the same as that for the fall, re-use the template and merely overwrite the Start Date and the Stop Date for the fall term with those for the spring term. If your schedule is dissimilar and you are re-using an existing template rather than adding a blank one, re-set the template before proceeding. If a template is obsolete, delete it.

Schedule an Appointment (Type: Individual)
(Reference: *Quick Guide for Advisors*, Sections 34.1 and 34.2)

Exercise A: A student requests an appointment with you for tomorrow and provides you with his/her ID. Schedule the appointment.

Exercise B: A student requests any appointment, but does not know his/her ID. The student also requests an appointment receipt. Use the SEARCH button on the STUDENT APPOINTMENT screen to assist you in finding the student and ensure that the PRINT RECEIPT box is checked. Then schedule the appointment.

Exercise C: A student requests any appointment, but does not know his/her ID. The student also requests an appointment reminder. Use the SEARCH button on the STUDENT APPOINTMENT screen and ensure that the PRINT REMINDER box is checked.

Schedule an Appointment (Type: Group)
(Reference: *Quick Guide for Advisors*, Section 34.1)

Exercise A: Two students wish to attend the next available orientation for new students. Schedule both students to attend the same orientation.

Exercise B: Print a list of students who are scheduled to attend the orientation.

Move a Scheduled Appointment (Type: Individual)
(Reference: *Quick Guide for Advisors*, Section 34.5)

Exercise A: A student telephones to advise you of his unavailability for an appointment. Move the scheduled appointment to another date and time.

Exercise B: A student wishes to reschedule her appointment for later in the same day. As you begin to move the appointment, the student decides to retain rather than reschedule the appointment. Cancel the move.

Extend an Appointment (Type: Individual)
(Reference: *Quick Guide for Advisors*, Section 34.4)

Exercise: A student requests an appointment to establish an education plan. Use the EXTEND option on the STUDENT APPOINTMENT screen to lengthen the appointment to one hour.

Cancel an Appointment (Type: Individual)
(Reference: *Quick Guide for Advisors*, Section 34.12)

Exercise: A student telephones to advise you that he needs to cancel an appointment. Cancel the appointment.

Configure Instant Messaging/Notification on your Workstation (Reference: *Quick Guide for Advisors*, Section 17.1)
Exercise: Set your preference for being notified of a student's arrival for an appointment. Right-click on the lightning bolt on the task bar and click on CONFIGURE to display the CONFIGURATION SCREEN.

Set Refresh Options on MY GRID (Reference: *Quick Guide for Advisors*, Section 10.3)
Exercise: Set your preference for modifying the manner in which your Grid is updated on your workstation. Press ALT R to display the REFRESH SETTINGS SCREEN.

APPENDIX F — SHORTCUT KEYS

A few keys are available as shortcut methods to perform specific actions.

From MY GRID:

- F1 Display the Help file.
- F2 Move back one day if in Data View by Date.
- F3 Move forward one day if in Data View by Date.
- F5 Refresh MY GRID.
- F6 Display the Configuration Screen on MY GRID.
- F8 Clear the comments from any cell that does not contain a booked appointment.
- F10 Toggle between two GRID screens when using the Split THE GRID in Half option.
- Alt+C Unlock a column.
- Alt+E Extend an appointment.
- Alt+G Open eAdvising screen.
- Alt+K Display a list of shortcut keys.
- Alt+L Lock a column.
- Alt+M Move an appointment.
- Alt+P Display the Print Options screen.
- Alt+Q Display the Quick Day Change screen.
- Alt+R Re-set the frequency of screen refreshes.
- Alt+T Change a column to the same Schedule Code.
- Alt+U Unextend an extended appointment.
- Alt+V Move or copy an appointment to the Drop-in screen.
- Alt+W Display the Waiting List screen from a booked appointment.
- Alt+X Export a schedule into Microsoft Outlook™.
- Alt+Y Unlock a column.
- Alt+Z Display the Command Menu.

From THE GRID:

- F1 Display the Help file.
- F2 Move back one day if in Data View by Date.
- F3 Move forward one day if in Data View by Date.
- F5 Refresh MY GRID.
- F10 Toggle between two GRID screens when using the Split THE GRID in Half option.
- F11 View the previous page of data.
- F12 View the next page of data.
- Alt+E Extend an appointment.
- Alt+F Refresh THE GRID.
- Alt+H Find available appointments.
- Alt+K Display a list of shortcut keys.
- Alt+L Lock a column.
- Alt+M Move an appointment.
- Alt+Q Display the Quick Day Change screen.
- Alt+R Re-set the frequency of screen refreshes.
- Alt+T Change a column to the same Schedule Code.
- Alt+U Unextend an extended appointment.
- Alt+V Move or copy an appointment to the Drop-in screen.
- Alt+Y Unlock a column.
- Alt+Z Display the Command Menu.

From the MASTER SCHEDULE screen:

- F1 Display the Help file.
- F4 Copy the selected Schedule Code and any corresponding comments from cell to cell.

From the NOTEPAD:

- F4 Transfer Reason Code Descriptions for the selected appointment to the body of the note.
- F6 Transfer the entire list of Additional Information Descriptions and Values to the body of the note.

From the QUICK DAY CHANGE screen:

- F1 Display the Help file.
- F2 Move back one day if in Data View by Advisor.
  -or-

  Move back one column to the previous advisor if in Data View by Date.
- F3 Move forward one day if in Data View by Advisor.
  -or-
  Move forward one column to the next advisor if in Data View by Date.
- F4 Copy the selected Schedule Code and any corresponding comments from cell to cell.
- F7 Change the value of a cell back to its original value.
- F8 Clear the comments from any cell that does not contain a booked appointment.
- Alt+K Display a list of shortcut keys.

From the ROSTER:

- Alt+N Access the Notepad.
- Alt+X Export from the Roster.

From the STUDENT APPOINTMENT screen:

- F1 Display the Help file.
- F4 Display a list of classes in which the student is enrolled (from a booked appointment).
- F7 Assign an auto-generated identifier to a student who does not have an ID.
- F9 Change the ID format in the ID field to accept another ID format.

From the STUDENT DROP-IN screen:

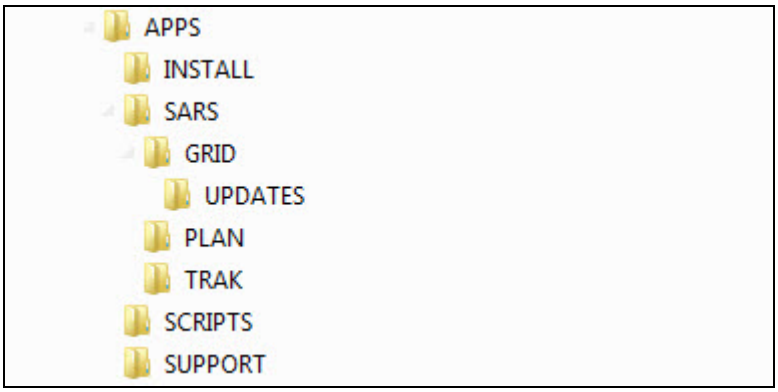
- F1 Display the Help file.
- F2 Back up one day.
- F3 Move forward one day.
- F5 Refresh the STUDENT DROP-IN SCREEN.
- F6 Display the DEFAULT SELECTION SCREEN.

From the SARS·GRID MENU:

- F6 Display the Voice Configuration Screen.
- Alt+B Create access to an additional SARS database.
- Alt+D Access the Drop-in Screen.

APPENDIX G — RECOMMENDED DIRECTORY STRUCTURE

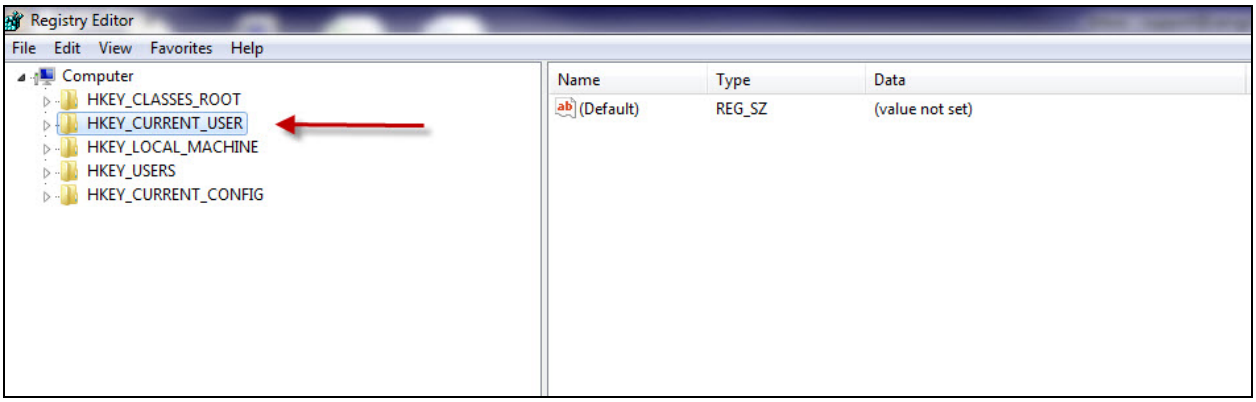
The following is the recommended directory structure for SARS·GRID, even if the college is not using other SARS Products. It is a requirement of the MSI installer.



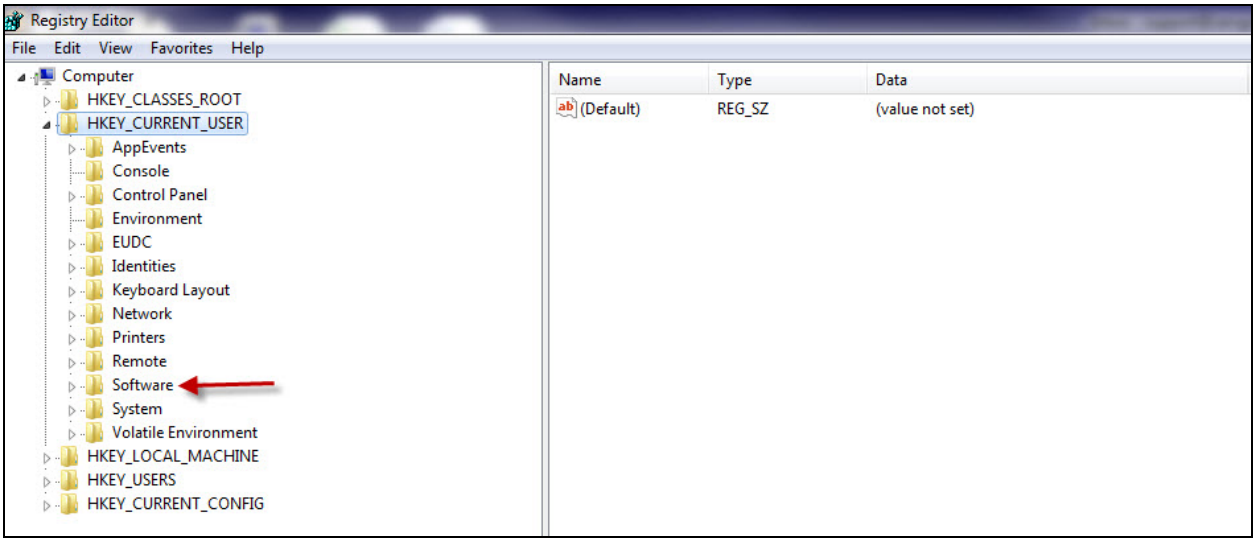
APPENDIX H — SARS REGISTRY SETTINGS

The SARS registry settings are located as follows:

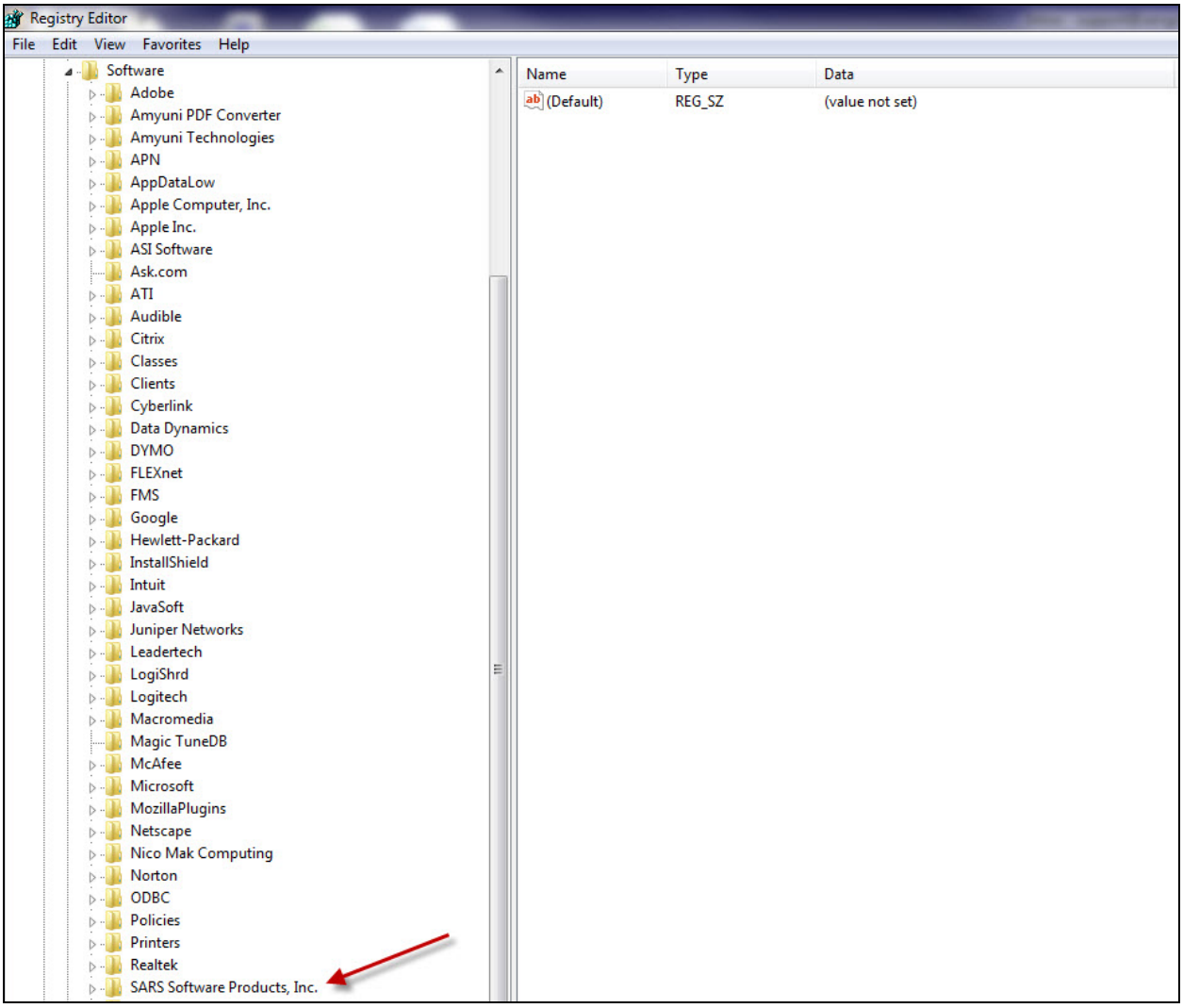
1. In the Registry Editor, navigate to HKEY_CURRENT_USER.



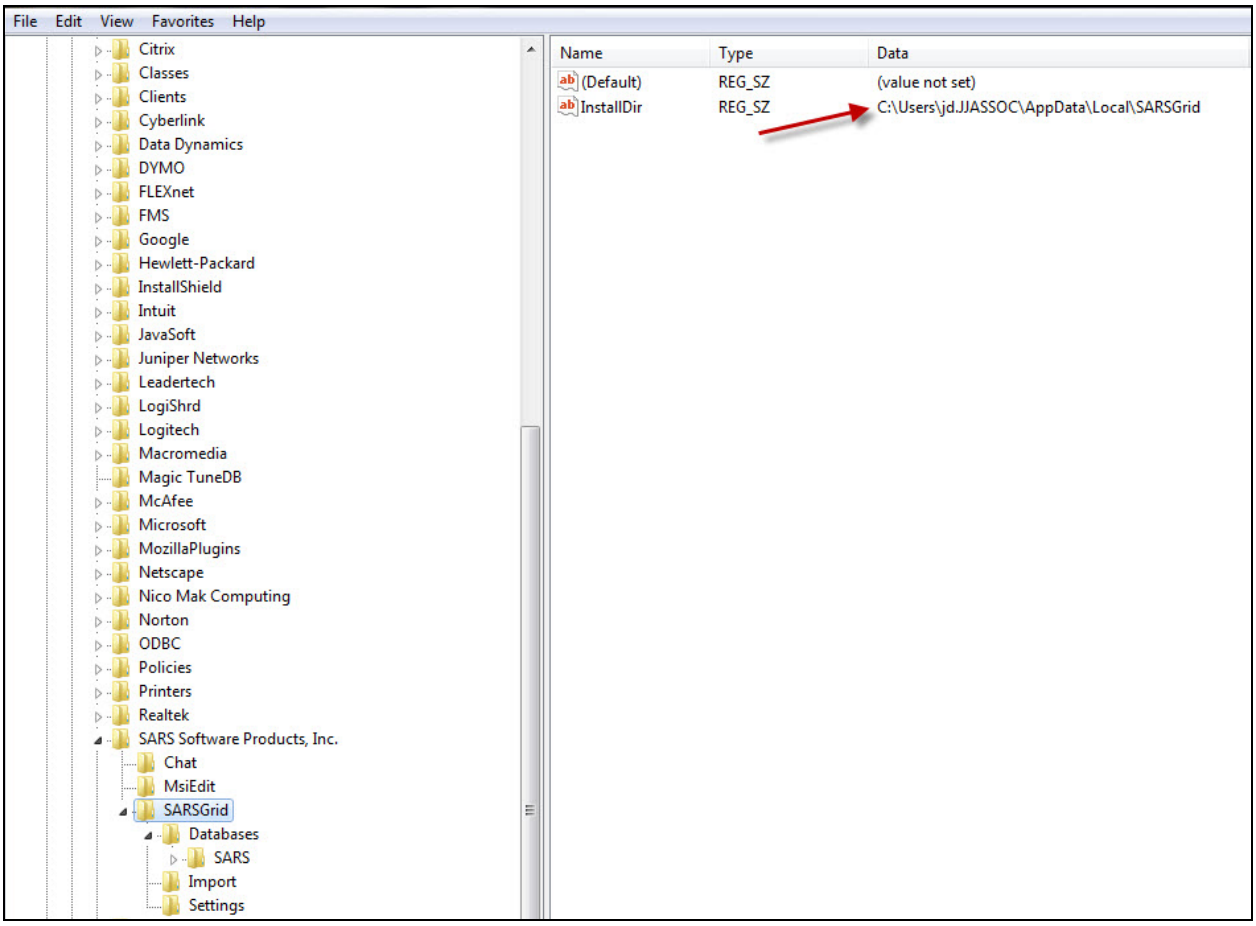
2. Click on HKEY_CURRENT_USER and navigate to Software.



3. Click on Software and navigate to SARS Software Products, Inc.



4. Click on SARS Software Products, Inc., and then on SARSGrid to display the location of the InstallDir, which is where all the local files are installed.



5. Click on SARSGrid and then on SARS to display the location of the DSN file.

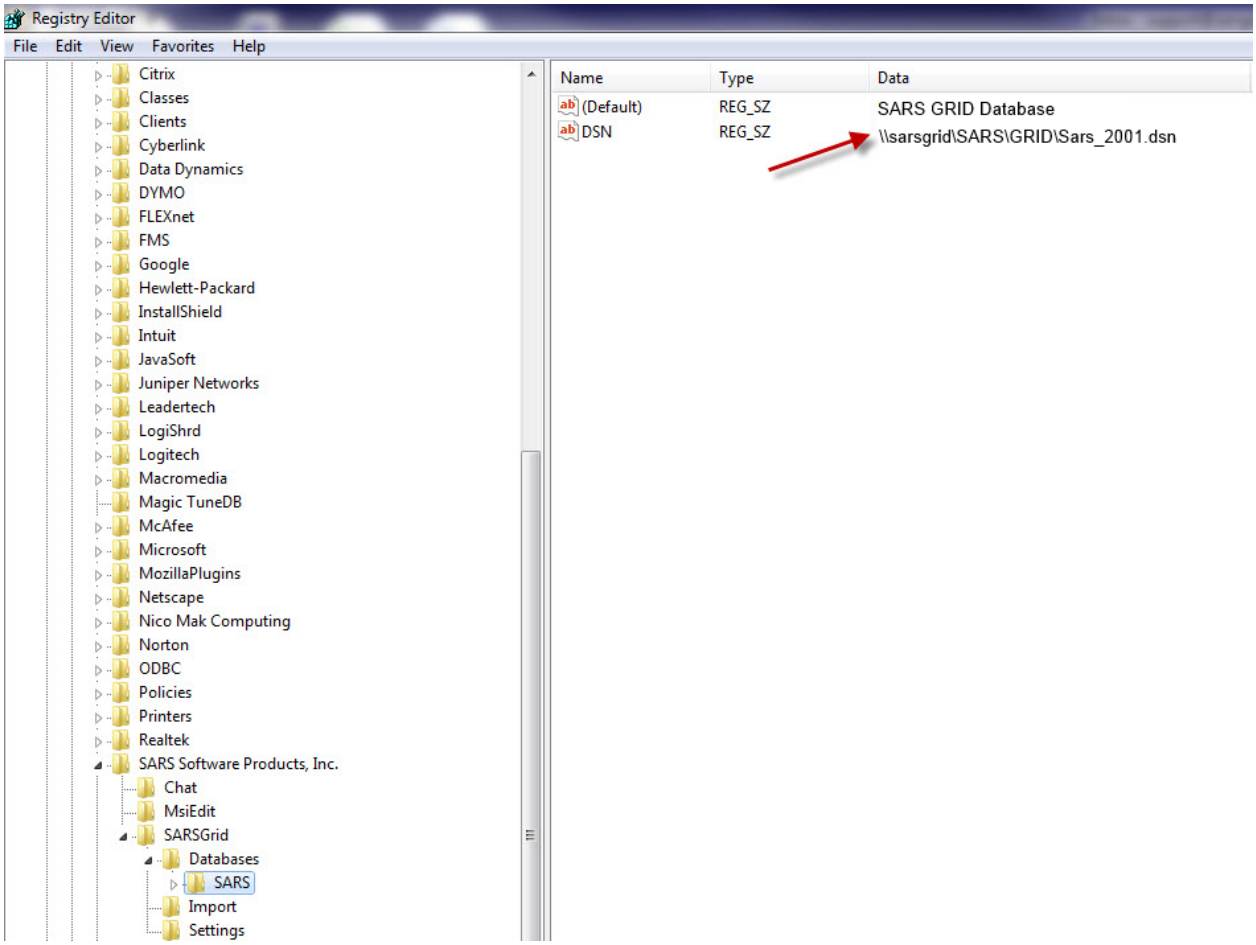


Table List
Sorted by Table Name

Table Name	Table Type	Description	Fields
Tbl_Access_Codes	Access	Table holds a list of valid Access Codes and the access rights associated with each code.	51
Tbl_Access_ID	Access	Holds the next available Access Code ID.	2
Tbl_Alert_ID	Access	Holds next available ID for Alerts in SARS·GRID.	2
Tbl_Alert_Reasons	Access	Table holds the reasons associated with an alert.	2
Tbl_Application	Access	Holds the application properties for SARS·TRAK.	45
Tbl_Application_ID	Access	Holds the next available Application ID.	2
Tbl_Application_Language_Xref	Access	Holds the next available Language ID for Applications in SARS·TRAK.	2
Tbl_Appt_Reasons	Access	Holds the next available ID for Appointment Reasons.	6
Tbl_Arrival_In_Process	Access	Obsolete.	7
Tbl_Button_Courses	Access	Holds the next available IDs for an application and course associated with a button in SARS·TRAK.	3
Tbl_Button_ID	Access	Holds the next available Button ID for SARS·TRAK.	2
Tbl_Button_Msg	Access	Holds the variables for message buttons in SARS·TRAK.	10
Tbl_Button_Props	Access	Holds the variables for buttons in SARS·TRAK.	35
Tbl_Button_Reasons	Access	Holds the Reason Code IDS for an Application and Button in SARS·TRAK.	3
Tbl_Button_Sched_Codes	Access	Holds the Schedule Code IDS for an Application and Button in SARSTRAK.	3
Tbl_Button_Section_XRef	Access	Holds all the sections related to the button.	7
Tbl_Change_Log	Access	Holds information about schedule changes that have been made.	9
Tbl_Contact_ID	Access	Holds the next available Student Contact ID.	2
Tbl_Contact_Master	Access	Holds information about additional student contacts.	3
Tbl_Contacts	Access	Holds information about specific student contacts.	4
Tbl_Counselor_Assignments	Access	Holds information about assignments of students to advisors.	3
Tbl_Counselor_Dates	Access	Holds an appointment date for an advisor.	3
Tbl_Counselor_Detail	Access	Holds details about an appointment or activity in a cell on THE GRID.	11
Tbl_Counselor_Export	Access	Controls the export from the advisor's schedule to Outlook.	12
Tbl_Counselor_Export_Codes	Access	Holds a list of the Schedule Codes that are exported to Outlook.	5
Tbl_Counselor_ID	Access	Holds the next available Advisor/Counselor ID.	2
Tbl_Counselor_Location_XRef	Access	Holds information about advisors and their locations.	9
Tbl_Counselor_Master	Access	Holds information about advisors.	9
Tbl_Counselor_Plan	Access	Holds the Day Code for a date in an advisor's schedule in SARS·PLAN.	4
Tbl_Counselor_Templates	Access	Holds information about advisors' master schedule templates.	6
Tbl_Course_ID	Access	Holds the next available Course IDs.	2
Tbl_Course_Master	Access	Holds information about Courses.	5

Table Name	Table Type	Description	Fields
Tbl_Course_Types	Access	Holds information about Course Types.	3
Tbl_DataTel	Access	Holds criteria for export process to Colleague.	8
Tbl_Dates_Current	Access	Holds a list of all the dates in Tbl_GRID_Current.	2
Tbl_Default_Msgs	Access	Holds a list of default messages used by SARS·TRAK and PC·TRAK.	3
Tbl_eMail	Access	Holds configuration values for email confirmation messages.	17
Tbl_Error_Log	Access	Holds all the errors generated by the system.	13
Tbl_eSARS	Access	Table holds all the properties for the e·SARS web interface.	75
Tbl_eSARS_NoMatch	Access	Hold information about appointment requests from the web which could not be handled.	12
Tbl_Exclude_Dates	Access	Table holds a list of dates that are excluded from scheduling (e.g., holidays).	2
Tbl_ExDate_Location_XRef	Access	Holds all the excluded dates for each Location.	2
Tbl_Export_Status	Access	Contains a list of the diferent export status IDs	2
Tbl_Format_ID	Access	Holds the next available Format ID.	2
Tbl_Grid_Current	Access	Holds the data that populates THE GRID.	19
Tbl_Group_ID	Access	Holds the next available Group ID.	2
Tbl_Group_Master	Access	Holds properties of a Group Code.	6
Tbl_Group_RCode_XRef	Access	Holds the Reason Code Groups for a Location.	2
Tbl_Group_SCode_XRef	Access	Holds the Schedule Code Groups for a Location.	2
Tbl_Group_SName_XRef	Access	Holds the Specialty Groups for a Location.	2
Tbl_History_ID	Access	Holds the next availalbe Student History ID.	2
Tbl_ID_Formats	Access	Holds the format for a student ID number.	5
Tbl_Import_Formats	Access	Holds all the import specifications for the import and auto-import process.	7
Tbl_Import_ID	Access	Holds the next available Import ID.	2
Tbl_Info_ID	Access	Holds the next available Additional Information ID.	2
Tbl_Info_List	Access	Holds properties of an Additional Info question.	3
Tbl_Info_List_ID	Access	Holds the next available Additional Information List ID.	2
Tbl_Info_Location_XRef	Access	Holds the location using the additional info question.	2
Tbl_Info_Master	Access	Holds criteria for an Additional Information question.	8
Tbl_Instructor_ID	Access	Holds a list of all the instructors that have been imported into the system with courses.	2
Tbl_Instructor_Master	Access	Holds information about an instructor.	7
Tbl_Language_ID	Access	Holds the next available Language ID.	2
Tbl_Languages	Access	Holds information about a language.	5
Tbl_Location_Control	Access	Holds the properties for a location.	68
Tbl_Location_ID	Access	Holds the next available Location ID.	2

Table Name	Table Type	Description	Fields
Tbl_Locked	Access	Holds information about a date locked on THE GRID.	6
Tbl_Mapping	Access	Holds mapped Reason Codes for export purposes.	5
Tbl_Master_Plan	Access	Holds the date and day code for an entry on the master calendar in SARS·PLAN.	3
Tbl_MultiApts	Access	Holds IDs for group apppointments and activities.	5
Tbl_Note_ID	Access	Holds the next available note ID.	2
Tbl_Note_Template_ID	Access	Holds the next available note template.	2
Tbl_Note_Templates	Access	Holds a Note Template.	5
Tbl_Plan_Audit_Trail	Access	Holds information about changes made to a plan when Audit Trail is set to "Yes."	9
Tbl_Plan_Control	Access	Holds controlling details for an individual plan in SARS·PLAN.	13
Tbl_Plan_Counselor_Master	Access	Holds the current status of an advisor's plan for a term.	8
Tbl_Plan_Day_Codes	Access	Holds the values for Day Codes for creating plans in SARS·PLAN.	8
Tbl_Plan_Start_Stop_Dates	Access	Holds the start and stop dates of an advisor's plan in SARS·PLAN.	4
Tbl_Plan_Term_ID	Access	The next available Plan Term ID.	2
Tbl_Plan_Terms	Access	Holds the values for Terms in SARS·PLAN.	12
Tbl_Plan_Time_Exceptions	Access	Holds exceptions to the default Start and Stop Times for a day of a plan.	5
Tbl_Plan_User_Xref	Access	Holds a cross-reference of a user and a plan in SARS·PLAN.	5
Tbl_Print_ID	Access	Obsolete.	2
Tbl_Reason_Counselor_XRef	Access	Holds the relationship between Reason Codes and Advisors.	2
Tbl_Reason_ID	Access	The next available Reason ID.	2
Tbl_Reasons	Access	Holds information about a reason in the system.	9
Tbl_Record_Sources	Access	Holds information about the source of an appointment or activity (e.g., GRID, TRAK, eSARS).	3
Tbl_Required_Courses	Access	Holds the courses that are related to a button in SARS·TRAK.	3
Tbl_SARS_Format_Location_XRef	Access	Obsolete.	2
Tbl_Sched_Code_ID	Access	Holds the next available Schedule Code ID.	2
Tbl_Sched_ID	Access	Holds the next available Sched ID.	2
Tbl_Schedule_Code_Props	Access	Holds the values for a Schedule Code.	24
Tbl_SCode_ACode_Chg_XRef	Access	Holds a cross-reference of Access Code IDs and the related Schedule Code IDs.	2
Tbl_Section_ID	Access	Holds the next available ID number for a course section.	2
Tbl_Section_Instructor_XRef	Access	Holds cross-references of instructors of a course Section.	3
Tbl_Section_Master	Access	Holds detail information about a course Section.	16
Tbl_Staff_Applications	Access	Obsolete	7
Tbl_Staff_Category_ID	Access	Obsolete	2
Tbl_Staff_Category_Master	Access	Obsolete	14

Table Name	Table Type	Description	Fields
Tbl_Staff_Category_Reason_Xref	Access	Obsolete	3
Tbl_Staff_Category_Sched_Code_Xref	Access	Obsolete	3
Tbl_Staff_Location_Xref	Access	Obsolete	2
Tbl_Staff_Members	Access	Obsolete	14
Tbl_Staff_Reports	Access	Obsolete	22
Tbl_Staff_Security	Access	Obsolete.	2
Tbl_Student_Alerts	Access	Table holds information about an Alert, including any Early Alert.	12
Tbl_Student_Courses	Access	Holds information about courses in which students are enrolled.	11
Tbl_Student_History	Access	Holds history of student's activities.	26
Tbl_Student_ID	Access	Holds the next available SARS Student ID number.	2
Tbl_Student_ID_XRef	Access	Holds a student's IDs.	3
Tbl_Student_Info	Access	Table holds Additional Information data associated with students.	9
Tbl_Student_Master	Access	Holds values for all student information.	28
Tbl_Student_Notes	Access	Holds the values for Notes.	10
Tbl_System_Control	Access	Holds the global information for the SARS database.	9
Tbl_Template_Detail_ID	Access	Holds the next available Template Detail ID.	2
Tbl_Template_ID	Access	Holds the next available Template ID.	2
Tbl_Term_ID	Access	Holds the next available Term ID.	2
Tbl_Term_Master	Access	Holds the values for Terms.	5
Tbl_TermIDs	Access	Holds information about Term IDs.	5
Tbl_Trak_Access_Codes	Access	Holds a list of access codes and their associated access for SARS·TRAK.	6
Tbl_TRAK_Format_Application_XRef	Access	Holds list of the Format Ids associated with the Application	2
Tbl_Trak_hrID	Access	Holds the next available Lab Hours IDs for SARS·TRAK.	2
Tbl_Trak_OpenLabHrs	Access	Holds the lab hours of the Cerfied Lab Administrator.	6
Tbl_Trak_Response	Access	Holds a response from a student who has reached the maximum hours by arrangement to allow more lab hours.	6
Tbl_Trak_User_App_XRef	Access	Holds a cross-reference of users and access codes for a SARS·TRAK application.	3
Tbl_User_Location_XRef	Access	Holds a cross-reference of users' Locations and access codes.	4
Tbl_Users	Access	Holds values for users of the SARS·GRID, SARS·TRAK, and SARS·PLAN applications.	9
Tbl_Walkin_ID	Access	Holds the next available ID for walk-ins.	2
Tbl_Walkin_Reasons	Access	Holds Reason IDs and Section IDs for Walkin visits.	3
Tbl_WalkIns	Access	Holds the values for walkin visits.	14
Tbl_Web_Errors	Access	Holds information about web errors.	7
Tbl_Web_Settings	Access	Holds display information for the e·SARS web interface.	6

Table: Tbl_Access_Codes

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Access_ID	Number, Long Integer	4	The unique ID number for each Access Code.	☐	No
2	Location_ID	Number, Long Integer	4	The ID number for the Location Code associated with this Access Code.	☐	No
3	Access_Code	Text	50	Describes the role of each type of user (e.g., Scheduler, Advisor).	☐	No
4	Sars	Yes/No	1	"Yes" will give users access rights to use SARS·GRID.	☐	No
5	GridHistory	Yes/No	1	"Yes" will give users access rights to History View from THE GRID.	☐	No
6	GridCurrent	Yes/No	1	"Yes" will give users access rights to Current dates from THE GRID.	☐	No
7	GridFuture	Yes/No	1	"Yes" will give users access rights to future dates from THE GRID.	☐	No
8	GridSchedule	Yes/No	1	"Yes" will give users access rights to schedule and change appointments on THE GRID.	☐	No
9	GridChangeConSched	Yes/No	1	"Yes" will give users access rights to change advisors' schedules on THE GRID.	☐	No
10	CGrid	Yes/No	1	"Yes" will give users access rights to MY GRID.	☐	No
11	CGridHistory	Yes/No	1	"Yes" will give users access rights to dates in the past from MY GRID.	☐	No
12	CGridCurrent	Yes/No	1	"Yes" will give users access rights to current dates from MY GRID.	☐	No
13	CGridFuture	Yes/No	1	"Yes" will give users access rights to future dates from MY GRID.	☐	No
14	CGridChgRCodes	Yes/No	1	"Yes" will give users access rights to change Reason Codes from MY GRID.	☐	No
15	CGridChgAppAllow	Yes/No	1	"Yes" will give users access rights to change Appointment-Allowable Schedule Codes.	☐	No
16	CGridChgNonAppAllow	Yes/No	1	"Yes" will give users access rights to change Non-Appointment-Allowable Schedule Codes.	☐	No
17	CGridRecordAttendance	Yes/No	1	"Yes" will give users access rights to record attendance from MY GRID.	☐	No
18	CGridSchedule	Yes/No	1	"Yes" will give users access rights to schedule appointments on MY GRID.	☐	No
19	AccessInfo	Yes/No	1	"Yes" will give users access rights to view Additional Information from MY GRID.	☐	No
20	Add	Yes/No	1	"Yes" will give users access rights to SARS ADD to add Schedules to THE GRID.	☐	No
21	Roll	Yes/No	1	"Yes" will give users access rights to SARS ROLL to roll The Grid forward.	☐	No
22	Report	Yes/No	1	"Yes" will give users access rights to SARS REPORTS to view and print reports.	☐	No
23	ReportPrintStats	Yes/No	1	"Yes" will give users access rights to view and print statistical and administrative reports.	☐	No
24	MeetingMaker	Yes/No	1	"Yes" will give users access rights to use Meeting Maker to schedule meetings.	☐	No
25	Exchange	Yes/No	1	"Yes" will give users access rights to use SARS Exchange to import and export student data.	☐	No
26	Util	Yes/No	1	"Yes" will give users access rights to UTIL.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
27	UtilSecurity	Yes/No	1	"Yes" will give users access rights to User Maintenance in SARS·UTIL.	☐	No
28	UtilConMaint	Yes/No	1	"Yes" will give users access rights to Short Name Maintenance in SARS·UTIL.	☐	No
29	UtilStudentMaint	Yes/No	1	"Yes" will give users access rights to Student Maintenance in SARS·UTIL.	☐	No
30	UtilTables	Yes/No	1	"Yes" will give users access rights to Table Maintenance in SARS·UTIL.	☐	No
31	Misc1	Yes/No	1	"Yes" will give users access to the Notepad	☐	No
32	Misc2	Yes/No	1	Obsolete.	☐	No
33	Misc3	Yes/No	1	Obsolete.	☐	No
34	TrakAccess	Yes/No	1	"Yes" will give users access rights to the administration side of SARS·TRAK.	☐	No
35	TrakManualEntry	Yes/No	1	"Yes" will give users access rights to Manual Entry in SARS·TRAK.	☐	No
36	TrakAdmin	Yes/No	1	"Yes" will give users access rights to Administration inside Trak Access in SARS·TRAK.	☐	No
37	TrakSecurity	Yes/No	1	"Yes" will give users access rights to User Maintenance in SARS·TRAK.	☐	No
38	TrakReports	Yes/No	1	"Yes" will give users access rights to Reports in SARS·TRAK.	☐	No
39	Plan_Admin	Yes/No	1	"Yes" will give users access rights to Administration in SARS·PLAN.	☐	No
40	Plan_Reports	Yes/No	1	"Yes" will give users access rights to Reports for SARS·PLAN.	☐	No
41	Plan_Security	Yes/No	1	"Yes" will give users access rights to User Maintenance in SARS·PLAN.	☐	No
42	Plan_Lock_Unlock	Yes/No	1	"Yes" will give users access rights to lock and unlock plans in SARS·PLAN.	☐	No
43	Planning	Yes/No	1	"Yes" will give users access rights to build their plans in SARS·PLAN.	☐	No
44	Call_Admin	Yes/No	1	"Yes" will give users access rights to Administration in SARS·CALL.	☐	No
45	Call_Reports	Yes/No	1	"Yes" will give users access rights to Reports in SARS·CALL.	☐	No
46	Call_Apps	Yes/No	1	"Yes" will give users access rights to work with applications in SARS·CALL.	☐	No
47	UtilMasterSchedule	Yes/No	1	"Yes" will give users access rights to Master Schedules in SARS·UTIL.	☐	No
48	DeleteNotes	Yes/No	1	"Yes" will give users access rights to delete Notes.	☐	No
49	AddDropins	Yes/No	1	"Yes" will give users access rights to add Dropins on the Dropin Screen.	☐	No
50	ViewStudentLog	Yes/No	1	"Yes" will give users access rights to view Student History.	☐	No
51	ViewEarlyAlerts	Yes/No	1	"Yes" will give users access rights to view Early Alerts.	☐	No

Table: Tbl_Access_ID

1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Access ID.	☐	No
2	Access_ID	Number, Long Integer	4	The next-available number for Access ID.	☐	No

Table: Tbl_Alert_ID

1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Alert ID.	☐	No
2	Alert_ID	Number, Long Integer	4	The next available number for Alert ID.	☐	No

Table: Tbl_Alert_Reasons

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Alert_ID	Number, Long Integer	4	Unique ID for each Alert.	☐	No
2	Reason_Code_ID	Number, Long Integer	4	ID number for a Reason Code associated with this Alert ID.	☐	No

Table: Tbl_Application

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	Number, Long Integer	4	The unique ID number for each Application in SARS·TRAK and PC·TRAK.	☐	No
2	Name	Text	50	Describes the name of each Application (e.g., Advising, Learning Center, Math Lab).	☐	No
3	Description	Text	50	Provides a description of each Application.	☐	No
4	Msg_timer	Number, Long Integer	4	The length of time that a message is displayed on the TRAK Enter screen.	☐	No
5	Use_ODBC	Yes/No	1	"Yes" enables the option to allow real time access to the college's student database while making appointments.	☐	No
6	Configuration_File	Text	255	The name of the file that contains the information about the database file.	☐	No
7	User_Name	Text	50	The user identification for gaining access to the college's host student database.	☐	No
8	User_Password	Text	50	The user password for gaining access to the college's host student database.	☐	No
9	Keep_DB_Open	Yes/No	1	"Yes" keeps the SARS database open at all times to improve performance.	☐	No
10	Appt_Lookup	Yes/No	1	"Yes" looks up pending appointments when a student enters the Student ID on SARS Enter.	☐	No
11	Counselor_Notify	Yes/No	1	"Yes" automatically sends notification to advisors when a student checks in for an appointment and attendance is marked.	☐	No
12	Cutoff_Incr	Number, Long Integer	4	The accuracy range to be offered when students are instructed to enter the actual amount of time spent on an activity in SARS·TRAK.	☐	No
13	Shutoff	Number, Long Integer	4	Obsolete.	☐	No
14	Commit_appt	Yes/No	1	"Yes" completes an appointment and place it on THE GRID.	☐	No
15	KeyPad_Hide	Yes/No	1	"Yes" hides the Key Pad on the SARS·TRAK Entry screen.	☐	No
16	KeyPad_Start	Yes/No	1	"Yes" displays the Key Pad when the SARS·TRAK Entry screen is opened.	☐	No
17	Card_Reader	Yes/No	1	Obsolete	☐	No
18	SARSGRID	Yes/No	1	"Yes" makes SARS·TRAK work in conjunction with SARS·GRID.	☐	No
19	Full_Screen	Yes/No	1	"Yes" indicates that the SARS·TRAK sign-in display will encompass the entire screen on the monitor.	☐	No
20	New_Student	Yes/No	1	"Yes" allows for new student entry.	☐	No
21	Style	Number, Long Integer	4	The number representing the SARS·ENTRY banner style (Scrolling, Sliding, Blinking, Bouncing, or none).	☐	No
22	Direction	Number, Long Integer	4	The number representing the direction in which the banner message movement occurs (Right to Left, Left to Right, Top to Bottom, or Bottom to Top).	☐	No
23	Delay	Number, Long Integer	4	The speed at which the banner message will move in the chosen direction (1 = fastest speed and 120 = slowest).	☐	No
24	Movement	Number, Long Integer	4	The amount of movement, in milliseconds, that will occur for each delay interval (1 = most amount of movement and 10 = the least).	☐	No
25	BGround	Number, Long Integer	4	The number representing the color of the TRAK banner and buttons.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
26	FGround	Number, Long Integer	4	Obsolete.	☐	No
27	Language_ID	Number, Long Integer	4	The number that represents a selected language.	☐	No
28	Show_waiting	Yes/No	1	"Yes" displays a message on the bottom of the Check-In screen showing the number of students currently waiting to be seen for a drop-in visit.	☐	No
29	Disable_App	Yes/No	1	"Yes" disables an application without deleting it.	☐	No
30	Appt_Filter	Number, Long Integer	4	The ID number of the Additional Information question that blocks a student from making an appointment in SARS·TRAK.	☐	No
31	Dropin_Filter	Number, Long Integer	4	The ID number of the Additional Information question that blocks a student from registering for a walkin visit.	☐	No
32	Checkin_Filter	Number, Long Integer	4	The ID number of the Additional Information question that blocks a student from checking into a visit in SARS·TRAK.	☐	No
33	Format_ID	Number, Long Integer	4	The ID number of the Student ID to be used in SARS·TRAK.	☐	No
34	Allow_ID_Toggle	Yes/No	1	"Yes" allows users to toggle between different ID formats on the TRAK Enter screen.	☐	No
35	Min_Before_Appt	Number, Long Integer	4	The maximum amount of time before a scheduled appointment time that a student may check-in.	☐	No
36	Min_After_Appt	Number, Long Integer	4	The maximum amount of time after a scheduled appointment time that a student may check-in.	☐	No
37	Form_BColor	Number, Long Integer	4	The number representing the background color of a form in TRAK.	☐	No
38	Button_UnClicked_BColor	Number, Long Integer	4	The number representing the background color of a button in TRAK before it is clicked.	☐	No
39	Button_Clicked_BColor	Number, Long Integer	4	The number representing the background color of a button in TRAK after it is clicked.	☐	No
40	Hours_multiplier	Number, Long Integer	4	The number of hours that may exceed the “Required Hours by Arrangement” as a multiplier of the number of units.	☐	No
41	Allow_extraHrs	Yes/No	1	"Yes" permits students to exceed the total number of “Required Hours by Arrangement” that have been established in SARS·TRAK.	☐	No
42	Primary_ID	Number, Long Integer	4	The primary ID for the Location in TRAK.	☐	No
43	Signup_Required	Yes/No	1	"Yes" requires students to sign up for additional lab hours in excess of the Hours by Arrangement.	☐	No
44	Start_At_Zero	Yes/No	1	"Yes" will prompt a student to sign up for additional lab hours.	☐	No
45	Use_Pin_Number	Yes/No	1	"Yes" will allow students to use a PIN number for login verification in addition to the student ID.	☐	No

Table: Tbl_Application_ID

1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for an Application in SARS·TRAK.	☐	No
2	Application_ID	Number, Long Integer	4	The next-available ID number for an Application in SARS·TRAK.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Application_Language_Xref						
1	Application_ID	Number, Long Integer	4	The unique ID number for an Application in SARS·TRAK.	☐	No
2	Language_ID	Number, Long Integer	4	The ID number for a language associated with the Application in SARS·TRAK.	☐	No
Table: Tbl_Appt_Reasons						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for Appointment Reasons.	☐	No
2	History_ID	Number, Long Integer	4	The next-available ID number for a student history record.	☐	No
3	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
4	Reason_Code_ID	Number, Long Integer	4	The next-available ID number for a Reason Code.	☐	No
5	Section_ID	Number, Long Integer	4	The next-available ID number for a Section.	☐	No
6	Required_Course_Section_ID	Number, Long Integer	4	The next-available ID number for a Required Course/Section.	☐	No
Table: Tbl_Arrival_In_Process						
1	Student_ID	Number, Long Integer	4	Obsolete.	☐	No
2	History_ID	Number, Long Integer	4	Obsolete.	☐	No
3	Button_ID	Number, Long Integer	4	Obsolete.	☐	Yes (Duplicates OK)
4	Duration	Number, Integer	2	Obsolete.	☐	No
5	Cutoff_Time	Date/Time	8	Obsolete.	☐	No
6	Sched_Date	Date/Time	8	Obsolete.	☐	No
7	Sched_Time	Date/Time	8	Obsolete.	☐	No
Table: Tbl_Button_Courses						
1	Button_ID	Number, Long Integer	4	The next-available ID number for a Button.	☐	No
2	Application_ID	Number, Long Integer	4	The next-available ID number for an Application associated with the Button.	☐	No
3	Course_ID	Number, Long Integer	4	The next-available ID number for a Course associated with the Button.	☐	No
Table: Tbl_Button_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Button.	☐	No
2	Button_ID	Number, Long Integer	4	The next-available ID number for a Button.	☐	No

Table: Tbl_Button_Msg

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Application_ID	Number, Long Integer	4	The unique ID number of an Application in SARS·TRAK.	☐	No
2	Button_ID	Number, Long Integer	4	The ID number of a Button associated with the Application.	☐	No
3	Language_ID	Number, Long Integer	4	The ID number of a Language associated with the Application.	☐	No
4	Msg_ID	Number, Long Integer	4	The ID number for a Message associated with the Application.	☐	No
5	Message	Text	255	The content of a message.	☐	No
6	Make_Sound	Yes/No	1	"Yes" will produce sound when using Button Messages in SARS·TRAK.	☐	No
7	Flash_Screen	Yes/No	1	"Yes" will create a flash on the screen when a selected message is triggered.	☐	No
8	Flash_Color	Number, Long Integer	4	The number representing the color of the screen flash when a selected message is triggered.	☐	No
9	Sound	Text	255	A description of the alert sound will be made when the selected message is triggered. ????? (Text???)	☐	No
10	Flash_Sound_Reps	Number, Integer	2	The number of times that the sound or flash color will occur before the message is displayed.	☐	No

Table: Tbl_Button_Props

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Button_ID	Number, Long Integer	4	The unique ID number for a button in SARS·TRAK.	☐	No
2	Application_ID	Number, Long Integer	4	The ID number of the Application associated with the button.	☐	No
3	Location_ID	Number, Long Integer	4	The D number of the Locationassociated with the button.	☐	No
4	Group_ID	Number, Long Integer	4	The default group selection.	☐	No
5	Def_Reason_ID	Number, Long Integer	4	The default Reason Code, if none selected by student.	☐	No
6	Def_Sched_ID	Number, Long Integer	4	The default Schedule Code for students who check in without an appointment.	☐	No
7	Option_Index	Number, Long Integer	4	2=Appt;3=check-in/out;4=drop-in'5=Message only	☐	No
8	SameDay	Yes/No	1	"Yes" allows Same Day Appointments to be made in SARS·TRAK.	☐	No
9	Allow_PrintReceipt	Yes/No	1	"Yes" allows students to print their appointment receipts from SARS·TRAK.	☐	No
10	Allow_one_Reason	Yes/No	1	"Yes" requires students to select at least one reason for their visits.	☐	No
11	Allow_Reasons	Yes/No	1	"Yes" allows the use of reasons when checking-in for SARS·TRAK.	☐	No
12	Ignore_Reason	Yes/No	1	"Yes" prevents the default reason code from being used. If checked, this option will disable the Lock Default Reason option.	☐	No
13	Ignore_CheckOut	Yes/No	1	"Yes" allows the system to not require students to check out. Instead, the duration of the selected Reason Code will be applied to the visit.	☐	No
14	Display_Message	Yes/No	1	"Yes"	☐	No
15	Use_Classes	Yes/No	1	"Yes" enables the Classes button, which will display a Course Selection screen showing all classes associated with the selected Location.	☐	No
16	Hide_Criteria	Yes/No	1	"Yes" will not provide search criteria for student selection when searching for an appointment in TRAK.	☐	No
17	Disable_Button	Yes/No	1	"Yes" inactivates the button (and all of its options) without deleting it.	☐	No
18	Max_Appts	Number, Long Integer	4	The maximum number of concurrent appointments for a student allowed by the Application.	☐	No
19	Lock_Default	Yes/No	1	"Yes" prevents students from de-selecting the Default Reason Code. (Enabled only if Allow Multiple Reasons is selected and Ignore Default Reason is not selected.)	☐	No
20	Hide_Default	Yes/No	1	"Yes" conceals the Default Reason on the screen display	☐	No
21	Show_Section	Yes/No	1	"Yes" displays the course section number on class selection buttons. (Enabled only if Use Classes is selected.)	☐	No
22	Appt_Filter	Number, Long Integer	4	The number representing an Additional Information ID for use to block a student from using TRAK to make an appointment.	☐	No
23	Dropin_Filter	Number, Long Integer	4	The number representing an Additional Information ID for use to block a student from using TRAK to make check in for a drop-in appointment.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
24	Checkin_Filter	Number, Long Integer	4	The number representing an Additional Information ID for use to block a student from using TRAK to check-in for a service.	☐	No
25	Max_Checkins	Number, Long Integer	4	The maximum number of times that a student may check into a location each day for any single course (range is 0 = no limit to 9). The default is set at 0.	☐	No
26	Min_Checkout_Time	Number, Long Integer	4	The minimum amount of time that a student must spend in an activity before checking out.	☐	No
27	Use_Checked_Sections	Yes/No	1	"Yes" will display the section number ,along with Subject and Course, on a button in TRAK.	☐	No
28	Require_Required_Courses	Yes/No	1	"Yes" will require that a Required Course be present in order to check in to its associated lab.	☐	No
29	Include_Hours_For_Required_Courses	Yes/No	1	Obsolete	☐	No
30	Allow_Comments	Yes/No	1	"Yes" allows students to enter comments on the Booked Appointment screen in SARS·TRAK, which will be displayed after the appointment is booked.	☐	No
31	Using_Early_Alert	Yes/No	1	"Yes" indicates that SARS·ALRT is integrated with the application.	☐	No
32	Display_Single_Reason	Yes/No	1	"Yes" will display a reason list, even if the list contains only one reason.	☐	No
33	Require_Reason	Yes/No	1	"Yes" requires a student to select at least one reason for an appointment or activity.	☐	No
34	Require_Course	Yes/No	1	"Yes" requires a student to select a Course for an appointment or activity.	☐	No
35	Use_Reasons	Yes/No	1	"Yes" requires that Reasons be used.	☐	No

Table: Tbl_Button_Reasons

1	Application_ID	Number, Long Integer	4	The ID number of an Application in SARS·TRAK.	☐	No
2	Button_ID	Number, Long Integer	4	The ID number of the Button associated with the Application in SARS·TRAK.	☐	No
3	Reason_ID	Number, Long Integer	4	The ID number of the Reason associated with the Application and Button in SARS·TRAK.	☐	No

Table: Tbl_Button_Sched_Codes

1	Application_ID	Number, Long Integer	4	The ID number of an Application in SARS·TRAK.	☐	No
2	Button_ID	Number, Long Integer	4	The ID number of the Button associated with the Application in SARS·TRAK.	☐	No
3	Sched_Code_ID	Number, Long Integer	4	The ID number of the Schedule Code associated with the Application and Button in SARS·TRAK.	☐	No

Table: Tbl_Button_Section_XRef

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Button_ID	Number, Long Integer	4	The ID number of a Button in SARS·TRAK.	☐	No
2	Section_ID	Number, Long Integer	4	The ID number of a Section associated with the Button.	☐	No
3	Default_Cutoff	Number, Long Integer	4	Default Cutoff (Maximum time) for this section	☐	No
4	Default_Duration	Number, Long Integer	4	Default Duration(If student does not check out) for this section	☐	No
5	Lab_Start_Date	Date/Time	8	Date that the lab starts allowing students to check-in	☐	No
6	Lab_Stop_Date	Date/Time	8	Date that the lab stops allowing students to check-in	☐	No
7	Require_Required_Course	Yes/No	1	Course required to attend the lab in addition to the actual course taken	☐	No

Table: Tbl_Change_Log

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Record_Type	Number, Long Integer	4		☐	No
2	Record_ID	Number, Long Integer	4	The ID number of the new record.	☐	No
3	Old_ID	Number, Long Integer	4	The ID number of the old record.	☐	No
4	Old_Value	Text	255	A description of the activity that was changed.	☐	No
5	New_ID	Number, Long Integer	4	The ID number representing the new activity.	☐	No
6	New_Value	Text	255	A description of the new activity that replaced the old one.	☐	No
7	User_Name	Text	50	The name or initials of the user who made the change.	☐	No
8	Change_Date	Date/Time	8	The date on which the change was made.	☐	No
9	Log_Message	Memo	0		☐	No

Table: Tbl_Contact_ID

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Contact.	☐	No
2	Contact_ID	Number, Long Integer	4	The next available ID number for a Contact.	☐	No

Table: Tbl_Contact_Master

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Contact_ID	Number, Integer	2	The unique number for a student contact.	☐	No
2	Location_ID	Number, Long Integer	4	The ID number for the Location associated with the contact.	☐	No
3	Contact_Desc	Text	50	A description of the contact.	☐	No

Table: Tbl_Contacts

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Contact_ID	Number, Long Integer	4	The unique number for this Additional Contact.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID number of the advisor involved in this Additional Contact.	☐	No
3	Sched_Date	Date/Time	8	The date of the Additional Contact.	☐	No
4	Contacts	Number, Long Integer	4	The number of additional contacts for the advisor and date.	☐	No

Table: Tbl_Counselor_Assignments

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
2	Location_ID	Number, Long Integer	4	The ID of the Location associated with the Student ID.	☐	No
3	Counselor_ID	Number, Long Integer	4	The ID of the advisor assigned to the Student ID.	☐	No

Table: Tbl_Counselor_Dates

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Counselor_ID	Number, Long Integer	4	The ID number of an advisor.	☐	No
2	Location_ID	Number, Long Integer	4	The ID for the Location associated with the advisor.	☐	No
3	Sched_Date	Date/Time	8	The date of an appointment for an advisor.	☐	No

Table: Tbl_Counselor_Detail

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	Number, Long Integer	4	The unique ID for this record.	☐	No
2	Parent_ID	Number, Long Integer	4	The ID number of the cell to which this cell is linked (used for extended codes).	☐	No
3	Last_Child_ID	Number, Long Integer	4	The ID number of the last cell to which this cell is linked (used for extended codes).	☐	No
4	Counselor_ID	Number, Long Integer	4	The ID number for the advisor associated with this record.	☐	No
5	Sched_Time	Date/Time	8	The time of the appointment for this record.	☐	No
6	Sched_Day	Number, Integer	2	The day of the week (integer from 1 to 7).	☐	No
7	Template_ID	Number, Integer	2	The ID number for a Template.	☐	No
8	Location_ID	Number, Long Integer	4	The ID number for the Location for this record.	☐	No
9	Sched_Code_ID	Number, Long Integer	4	The ID number for the Schedule Code for this record.	☐	No
10	Comments	Text	50	Comments written for the cell.	☐	No
11	Misc	Text	50	Miscellaneous comments written for the cell.	☐	No

Table: Tbl_Counselor_Export

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Location_ID	Number, Long Integer	4	The ID of the Location for this Export record.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID of the advisor for this Export record.	☐	No
3	Export_Enabled	Yes/No	1	"Yes" enables the export option.	☐	No
4	Export_Days	Number, Integer	2	The number of days to be exported to Outlook.	☐	No
5	Days_In_Advance	Number, Integer	2	The number of days prior to the first date to start the export process to Outlook.	☐	No
6	Subject_Type	Number, Integer	2	The number representing whether Student Contact, Custom fill-in, or Student Name will be exported.	☐	No
7	Subject_Text	Text	50	If Custom fill-in is selected, the text that will be contained in that field.	☐	No
8	Location_Type	Number, Integer	2	The number representing whether the Location is Room Number, SARS Grid Location, or Custom Location.	☐	No
9	Body_Type	Number, Integer	2	The number representing what data will be exported from SARS to Outlook for an appointment.	☐	No
10	Use_Reminder	Yes/No	1	"Yes" will trigger a reminder in Outlook "x" minutes prior to the appointment.	☐	No
11	Reminder_Minutes	Number, Integer	2	The number of minutes prior to the appointment that will trigger the reminder.	☐	No
12	Export_Option	Number, Integer	2	The number that will determine whether the auto export process will be used.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Counselor_Export_Codes						
1	Location_ID	Number, Long Integer	4	The ID number of a Location for the Export.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID of an advisor associated with the Location for the Export.	☐	No
3	Sched_Code_ID	Number, Long Integer	4	The ID number of the Schedule Code associated with the Export.	☐	No
4	Export	Yes/No	1	"Yes" wil specify that the Schedule Code will be exported to Outlook	☐	No
5	Status	Text	50	The status of the export process.	☐	No
Table: Tbl_Counselor_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for an Advisor/Counselor.	☐	No
2	Counselor_ID	Number, Long Integer	4	The next available ID number for an Advisor/Counselor.	☐	No
Table: Tbl_Counselor_Location_XRef						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for an advisor.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID number of the advisor.	☐	No
3	Location_ID	Number, Long Integer	4	The ID number for the Location associated with the advisor.	☐	No
4	Active	Yes/No	1	"Yes" indicates that the advisor is active in the associated Location.	☐	No
5	Room_No	Text	50	Describes the room number for the advisor.	☐	No
6	Start_Name	Text	255	The alpha character(s) representing the beginning of the name range of students assigned to an advisor.	☐	No
7	End_Name	Text	255	he alpha character(s) representing the end of the name range of students assigned to an advisor.	☐	No
8	Display_Order	Number, Integer	2	The order of placement of the advisor's name on THE GRID.	☐	No
9	Allow_In_eSARS	Yes/No	1	"Yes" indicates that the advisor's name will be included in e·SARS for students to select when making an appointment.	☐	No
Table: Tbl_Counselor_Master						
1	Counselor_ID	Number, Long Integer	4	The unique ID number for the advisor.	☐	No
2	Short_Name	Text	20	The abbreviated assigned Short Name for the advisor (typically 8 characters maximum).	☐	No
3	Long_Name	Text	30	The full name of the advisor.	☐	No
4	Title	Text	15	The title of the advisor.	☐	No
5	Room_No	Text	50	The advisor's room number.	☐	No
6	Inactive	Yes/No	1	"Yes" indicates that the advisor is inactive.	☐	No
7	Alternate_ID	Text	50	The college-assigned ID for the advisor.	☐	No
8	Deleted	Yes/No	1	"Yes" indicates that the advisor has been deleted from the application.	☐	No
9	Email_Address	Text	255	The email address for the advisor.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Counselor_Plan						
1	Term_ID	Number, Long Integer	4	The ID of the term for an advisor's schedule in SARS·PLAN.	☐	No
2	Date	Date/Time	8	The date that contains the Day Code in the advisor's schedule.	☐	No
3	Day_Code	Text	10	The name of the Day Code (e.g., Required, High Priority) for a schedule date in SARS·PLAN.	☐	No
4	Counselor_ID	Number, Long Integer	4	The ID of the advisor associated with the schedule.	☐	No
Table: Tbl_Counselor_Templates						
1	Counselor_ID	Number, Long Integer	4	The ID number for the advisor.	☐	No
2	Template_ID	Number, Integer	2	The ID number for the advisor's master schedule template.	☐	No
3	Location_ID	Number, Long Integer	4	The ID number for the Location Code associated with the master schedule.	☐	No
4	Start_Date	Date/Time	8	The start date of the advisor's master schedule template.	☐	No
5	Stop_Date	Date/Time	8	The stop date of the advisor's master schedule template.	☐	No
6	Auto_Add	Yes/No	1	"Yes" will automatically add the advisor's master schedule to THE GRID.	☐	No
Table: Tbl_Course_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Course ID.	☐	No
2	Course_ID	Number, Long Integer	4	The next available number for Course ID.	☐	No
Table: Tbl_Course_Master						
1	Course_ID	Number, Long Integer	4	The ID number of a Course.	☐	No
2	Subject	Text	50	The name of the Subject for the Course.	☐	No
3	Course	Text	50	The name of the Course.	☐	No
4	Description	Text	50	A description of the Course/Subject.	☐	No
5	Manual	Yes/No	1		☐	No
Table: Tbl_Course_Types						
1	Course_Type_ID	Number, Long Integer	4	The ID number of a Course Type.	☐	No
2	Course_Type	Text	50	The name of the Course Type.	☐	No
3	Description	Text	255	A description of the Course Type.	☐	No
Table: Tbl_DataTel						
1	Location_ID	Number, Long Integer	4	The ID number of the Location.	☐	No
2	Default_TermID	Number, Long Integer	4	The ID of the Term for the export.	☐	No
3	Default_Duration	Number, Long Integer	4	The Default Time for an activity, if no duration has been set.	☐	No
4	Default_Reason	Number, Long Integer	4	The Default Reason for an activity, if no reason has been set.	☐	No
5	Location_Disabled	Yes/No	1	"Yes" indicates that the Location is disabled and will not be exported.	☐	No
6	Use_DateRange_Only	Yes/No	1	"Yes" specifies that only the Date Range will be used for the export (will ignore Term IDs).	☐	No
7	Start_Date	Date/Time	8	The start date for the export to Colleague, if using Date Range only.	☐	No
8	Stop_Date	Date/Time	8	The stop date for the export to Colleague, if using Date Range only.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Dates_Current						
1	Sched_Date	Date/Time	8	Valid Date for this location	☐	No
2	Location_ID	Number, Long Integer	4	The ID number of the Location in SARS·TRAK.	☐	No
Table: Tbl_Default_Msgs						
1	Msg_ID	Number, Long Integer	4	The ID number of a message.	☐	No
2	Message	Text	255	The body of the message.	☐	No
3	Msg_Desc	Text	255	The description of the message.	☐	No
Table: Tbl_eMail						
1	Location_ID	Number, Long Integer	4	The ID number of the Location.	☐	No
2	From_Name	Text	255	The name of the individual or entity (department) sending the email receipt message.	☐	No
3	From_Address	Text	255	The email address of the individual or entity sending the message.	☐	No
4	Reply_Address	Text	255	The email address to which a reply will be sent.	☐	No
5	Send_Method	Number, Integer	2	0 = SARSUTILs Web Service; 1 = SMTP	☐	No
6	SMTP_Server	Text	255	The name of the SMTP Server that will be used to send and receive email messages.	☐	No
7	SMTP_Port	Number, Integer	2	The number of the SMTP Port on which the SMTP server listens for connections. This is typically port 25.	☐	No
8	Login_Required	Yes/No	1	"Yes" requires users to login to the email configuration screen.	☐	No
9	Username	Text	255	The username of the person, if login is required.	☐	No
10	Password	Text	255	The password of the user, if login is quired.	☐	No
11	Subject	Text	255	The text to be included in the Subject Line for the email.	☐	No
12	Body	Memo	0	The text in the body of the email message.	☐	No
13	Reminder_Type	Yes/No	1	Always set to "YES"	☐	No
14	Reminder_HTML	Yes/No	1	"Yes" indicates that the email reminder will be s ent in HTML format rather than plain text.	☐	No
15	Use_SSL	Yes/No	1	"Yes" indicates that SSL will be used for authentication purposes.	☐	No
16	Timeout	Number, Long Integer	4	The maximum time to wait for a response from the SMTP server.	☐	No
17	Reminder_Format	Yes/No	1		☐	No

Table: Tbl_Error_Log

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	AutoNumber, Long Integer, Increment	4	System generated number	☐	No
2	Record_Source_ID	Number, Long Integer	4	Name of Program causing the Error	☐	No
3	Error_Number	Number, Long Integer	4	The error number generated with the error	☐	No
4	Error_Line	Number, Long Integer	4	The line number in the source code associated with the error	☐	No
5	Error_Function	Text	255	Name of the functions where the error occured	☐	No
6	Error_Message	Memo	0	The error message that was generated by the error event	☐	No
7	Computer_Name	Text	255	The identification of the computer on which the error occurred.	☐	No
8	SARS_User_Name	Text	50	Name of the user logged into the SARS application	☐	No
9	Windows_User_Name	Text	50	Name of the windows user associated with the error event	☐	No
10	Time_Stamp	Date/Time	8	The time that the error occurred.	☐	No
11	Database_Version	Text	50	The version of the Database in which the error occurred.	☐	No
12	Application_Version	Text	50	The version of the Application in which the error occurred.	☐	No
13	Application_Name	Text	255	The name of the Application in which the error occurred.	☐	No

Table: Tbl_eSARS

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Department	Text	255	The name of the Location accessed via the web interface.	☐	No
2	ApptType	Number, Integer	2	The number representing the type of appointment to be made.	☐	No
3	NewStuApptType	Number, Integer	2	Customization Field	☐	No
4	ContStuApptType	Number, Integer	2	Customization Field	☐	No
5	UseEMailNotify	Yes/No	1	"Yes" will initiate email notifications to students.	☐	No
6	EMailFrom	Text	255	The name from whom the email will be sent.	☐	No
7	EMailTo	Text	255	The name of the recipient of the email.	☐	No
8	CancelReasonGroup	Number, Long Integer	4	The number representing the reason for a cancellation.	☐	No
9	ApptReasonGroup	Number, Long Integer	4	The number representing the Reason Group for the appointment.	☐	No
10	ReturnRecords	Number, Integer	2	Number of records returned from a query	☐	No
11	ReturnAppts	Number, Integer	2	The number of possible appointment slots to be displayed to the student for selection.	☐	No
12	DataView	Text	10	Days Available	☐	No
13	DefLocation	Number, Long Integer	4	Location ID that this application will be configured to use	☐	No
14	MaxAppts	Number, Integer	2	The maximum number of concurrent pending appointments that a student may have in the system.	☐	No
15	SARSUserName	Text	20	Future inhancement	☐	No
16	TransLog	Text	20	Obsolete	☐	No
17	IDFormat	Number, Long Integer	4	The student ID format to be used for e·SARS.	☐	No
18	BDateFormat	Text	10	The format for student birth dates to be entered when logging in to the web interface.	☐	No
19	TimeOutLength	Number, Integer	2	The number of minutes after which the system will log out the student if no action is taken.	☐	No
20	CancelReason	Yes/No	1	"Yes"requires the student to select a reason for cancelling an appointment via the web interface.	☐	No
21	SchedCodeGroup	Number, Long Integer	4	The number representing the Schedule Code Group for appointments.	☐	No
22	ReturnHistory	Number, Integer	2	The number of records that will be displayed for a query.	☐	No
23	ConFilter	Yes/No	1	"Yes" displays only those advisors who are currently available for appointments during the specified time period.	☐	No
24	UseConGroups	Yes/No	1	"Yes" allows students to select from a specialty group when making an appointment (e.g., Spanish-speaking advisors).	☐	No
25	ApptReason	Yes/No	1	"Yes" forces the student to enter a reason when booking an appointment. If this option is selected, a Reason Code Group that was created in SARS·GRID must also be selected.	☐	No
26	CanReason	Yes/No	1	"Yes" forces the student to enter a reason when canceling an appointment. If this option is selected, a Reason Code Group that was created in SARS•GRID must also be selected.	☐	No
27	PrintReceipt	Yes/No	1	"Yes" specifies that a confirmation receipt will be printed after the appointment is committed.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
28	PrintServerDir	Text	255	The name of the print server directory that will be used for confirmation receipts.	☐	No
29	ReportPrinter	Text	255	The name and path of the report printer that will be used to print reports.	☐	No
30	LabelPrinter	Text	255	The name and path of the printer that will be used to print labels.	☐	No
31	LabelOrientation	Text	10	The specification as to whether labels will be printed in Portrait or Landscape version.	☐	No
32	LabelPaper	Number, Integer	2	The type of label paper being used to print confirmation receipts.	☐	No
33	LabelSize	Number, Integer	2	The size of the label being used to print confirmation receipts.	☐	No
34	PrintServer	Number, Integer	2	The name and path of the print server	☐	No
35	ReceiptType	Number, Integer	2	Obsolete	☐	No
36	LimitDates	Yes/No	1	"Yes" limits the date range that may be searched when looking for an appointment.	☐	No
37	StartDate	Text	10	The first date in the date range allowed for appointment searches.	☐	No
38	StopDate	Text	10	The last date in the date range allowed for appointment searches.	☐	No
39	Filter_Students	Yes/No	1	"Yes" prohibits selected students (e.g., students on probation) from taking an action using the web interface.	☐	No
40	Filter_ID	Number, Long Integer	4	The number representing the additional information linked to the Filter Students option.	☐	No
41	Allow_Cancel	Yes/No	1	"Yes" permits students to cancel existing appointments.	☐	No
42	Limit_Time	Yes/No	1	"Yes" specifies that will use the limit hours.	☐	No
43	Limit_Hours	Number, Integer	2	The maximum hours in advance of an appointment that students may schedule that appointment.	☐	No
44	Use_Classes	Yes/No	1	"Yes" displays Classes as reasons for an appointment in e·SARS.	☐	No
45	Limit_Program	Yes/No	1	"Yes" prevents certain students from using the web interface for designated programs (e.g. Drop-in).	☐	No
46	Program_ID	Number, Long Integer	4	The ID number of the program that is associated with the Limit Program option.	☐	No
47	Count_All_Appts	Yes/No	1	Looks at all locations to see how many appointments are pending	☐	No
48	eMail_Reminder	Yes/No	1	"Yes" sends email appointment confimations after appointments are committed.	☐	No
49	eMail_Template	Text	10	The language to be displayed in the body of the email template.	☐	No
50	Allow_ID_Toggle	Yes/No	1	"Yes" permits students to toggle between different Student ID formats.	☐	No
51	Require_Phone_Number	Yes/No	1	"Yes" requires students to enter their phone number before booking an appointment.	☐	No
52	Allow_New_Student_Add	Yes/No	1	"Yes" allows new students to be added via the web.	☐	No
53	Show_Sched_Code	Yes/No	1	"Yes" displays e·SARS schedule codes on the query results page.	☐	No
54	Require_Email	Yes/No	1	"Yes" requires students to enter their email address so that an email confirmation may be sent.	☐	No
55	Show_Comments	Yes/No	1	"Yes" displays any comments associated with this appointment on Student History.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
56	Reason_First	Yes/No	1	"Yes" forces students to select a Reason Code before selecting other appointment criteria. (Required if the Link to Short Name option and the Show Appt. Duration on Query Results options are selected.)	☐	No
57	Show_Duration	Yes/No	1	"Yes" displays the length of the appointment on the selection screen.	☐	No
58	Ignore_Weekend	Yes/No	1	"Yes" disregards weekends if the Limit Time or Limit Hours options restrict the search for appointments.	☐	No
59	Ignore_Trak_Hist	Yes/No	1	"Yes" disregards any activities in student history made via SARS·TRAK.	☐	No
60	Reason_Counselor_Link	Yes/No	1	"YES" Specifies that each reason is associated with a short name	☐	No
61	Limit_Cancel	Yes/No	1	"YES" Prevents students from cancelling appointments from Schedule Codes that eSARS is not configured to use.	☐	No
62	Use_ODBC	Yes/No	1	"Yes" enables the option to allow real time access to the college's student database while making appointments.	☐	No
63	ODBC_Config_File	Text	255	The name of the file that contains the information about the database file.	☐	No
64	ODBC_UserName	Text	255	The user identification to gain access to the college's host student database.	☐	No
65	ODBC_Password	Text	255	The password of the user to gain access to the college's host student database.	☐	No
66	Use_Pin_Number	Yes/No	1	"Yes" allows a student to log into the web interface using a PIN in lieu of a birth date.	☐	No
67	Require_Email_Or_Phone	Yes/No	1	"Yes" requires that the user enter his/her email or phone number.	☐	No
68	Reminder_Format	Yes/No	1	"Yes" specifies that email sends in HTML format	☐	No
69	From_Address	Text	255	The name of the person or entity sending the reminder.	☐	No
70	Reply_Address	Text	255	The address of the person or entity sending the reminder.	☐	No
71	From_Name	Text	255	The name of the sender of the reminder.	☐	No
72	Subject	Text	255	The text that is contained on the Subject Line of the reminder.	☐	No
73	Body	Memo	0	The language in the body of the reminder.	☐	No
74	Con_Group_Class_Link	Yes/No	1	"Yes" Specifies that the speciality groups are classes.	☐	No
75	Default_Class_Appt_Duration	Number, Integer	2	The length of the class or appointment.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_eSARS_NoMatch						
1	ID	AutoNumber, Long Integer, Increment	4	System generated Number	☐	No
2	eSARS_Application	Text	255	Name of the eSARS Application	☐	No
3	Student_ID	Number, Long Integer	4	The internal Student Id which identifies the student	☐	No
4	Search_Timestamp	Date/Time	8	Time of the failed search	☐	No
5	Specialty_Group	Number, Long Integer	4	Any associated speciality group	☐	No
6	Reason_Code_ID	Number, Long Integer	4	Reason Code ID of the Reason selected by the Student	☐	No
7	Section_ID	Number, Long Integer	4	If using classes, then the Section Id of the Class selected by the Student	☐	No
8	Schedule_Code_ID	Number, Long Integer	4	The Schedule Code ID of the Schedule Code associated with the Student's request	☐	No
9	Day_Of_Week	Text	255	Day of the week Selected	☐	No
10	Start_Time	Date/Time	8	Start time Selected	☐	No
11	Stop_Time	Date/Time	8	Stop time Selected	☐	No
12	Counselor_ID	Number, Long Integer	4	Counselor_ID of the Short_Name Selected	☐	No
Table: Tbl_Exclude_Dates						
1	Sched_Date	Date/Time	8	The calendar date to be excluded from scheduling (e.g., 12/25).	☐	No
2	Description	Text	50	A description of the calendar date to be excluded (e.g., Christmas).	☐	No
Table: Tbl_ExDate_Location_XRef						
1	Sched_Date	Date/Time	8	The date of an Excluded Date.	☐	No
2	Location_ID	Number, Long Integer	4	The Location associated with the Excluded Date.	☐	No
Table: Tbl_Export_Status						
1	Export_Status_ID	Number, Long Integer	4	1 - rejected; 2-accepted;3 user action required	☐	No
2	Description	Text	255	Text description of the Export Status Id	☐	No
Table: Tbl_Format_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for ID Formats.	☐	No
2	Format_ID	Number, Long Integer	4	The next available ID number for ID Format.	☐	No

Table: Tbl_Grid_Current

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Sched_ID	Number, Long Integer	4	The unique ID number for this record.	☐	No
2	Parent_ID	Number, Long Integer	4	The ID number of the cell to which this cell is linked (used only for extended appointments).	☐	No
3	Last_Child_ID	Number, Long Integer	4	The ID number of the last cell to which this cell is linked (used only for extended appointments).	☐	No
4	Location_ID	Number, Long Integer	4	The unique ID number for the Location Code.	☐	No
5	Counselor_ID	Number, Long Integer	4	The unique ID number for this advisor.	☐	No
6	Sched_Date	Date/Time	8	The date of this appointment.	☐	No
7	Sched_Time	Date/Time	8	The time of this appointment.	☐	No
8	Sched_Code_ID	Number, Long Integer	4	The unique ID number of the Schedule Code for this appointment.	☐	No
9	Orig_Sched_Code_ID	Number, Long Integer	4	The unique ID number of the original Schedule Code for this appointment.	☐	No
10	Current_Sched_Code_ID	Number, Long Integer	4	The unique ID number of the Schedule Code (used for marking appointment when copying or moving it).	☐	No
11	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
12	History_ID	Number, Long Integer	4	The corresponding record in Tbl_Student_History.	☐	No
13	Max_Students	Number, Integer	2	The maximum students allowed for a group appointment.	☐	No
14	Comments	Text	255	Any comments for this cell (from advisor's master schedule and/or appointment screen).	☐	No
15	Misc	Text	255	Any miscellaneous comments for this cell (only from advisor's master schedule).	☐	No
16	Room_Number	Text	50	The room number for this appointment.	☐	No
17	Duration	Number, Integer	2	The length of the activity in this cell.	☐	No
18	Reserve_Comments	Text	255	use to store temporary information about the appointment during the booking process.	☐	No
19	Primary_Appt_ID	Number, Long Integer	4	Obsolete	☐	No

Table: Tbl_Group_ID

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Group.	☐	No
2	Group_ID	Number, Long Integer	4	The next available ID number for a Group.	☐	No

Table: Tbl_Group_Master

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Group_ID	Number, Long Integer	4	The unique ID number for this Group Code.	☐	No
2	Location_ID	Number, Long Integer	4	The unique ID number for the Location Code.	☐	No
3	Group_Code	Text	10	The name of this Group Code (e.g., "Spanish").	☐	No
4	Group_Desc	Text	50	A description of this Group Code (e.g., "Spanish-speaking advisor").	☐	No
5	Group_Type	Text	2	Designates the code controlled by the Group Code ("C" = Specialty, "S" = Schedule Codes, "R" = Reason Codes).	☐	No
6	Include_In_Group_Totals	Yes/No	1	"Yes" indicates that the advisor's Master Schedule for the selected Schedule Code Group Type should be counted in the totals displayed on the Master Schedule Report.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Group_RCode_XRef						
1	Group_ID	Number, Long Integer	4	The unique ID number for the group to which the Reason Codes are assigned.	☐	No
2	Reason_Code_ID	Number, Long Integer	4	The unique ID number for the Reason Code.	☐	No
Table: Tbl_Group_SCode_XRef						
1	Group_ID	Number, Long Integer	4	The unique ID number for the group to which the Schedule Codes are assigned.	☐	No
2	Sched_Code_ID	Number, Long Integer	4	The unique ID number for the Schedule Code.	☐	No
Table: Tbl_Group_SName_XRef						
1	Group_ID	Number, Long Integer	4	The unique ID number for the group to which the Specialty Codes are assigned.	☐	No
2	Counselor_ID	Number, Long Integer	4	The unique ID number for the Specialty Code.	☐	No
Table: Tbl_History_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for History ID.	☐	No
2	History_ID	Number, Long Integer	4	The next-available number for History ID.	☐	No
Table: Tbl_ID_Formats						
1	Format_ID	Number, Long Integer	4	The unique ID number for this ID Format.	☐	No
2	Mask	Text	50	The type and sequence of characters that make up the ID Format .	☐	No
3	Description	Text	50	A description of the ID Format (e.g., Student ID, Guest ID).	☐	No
4	Zero_Pad	Yes/No	1	"Yes" indicates that the system should insert zeros before any student IDs that have fewer digits than the total required by the ID Format, if it is all-numeric.	☐	No
5	Disable	Yes/No	1	"Yes" indicates that the ID Format will be disabled (but not deleted) and unavailable for use.	☐	No
Table: Tbl_Import_Formats						
1	Import_ID	Number, Long Integer	4	Number associated with this import spec	☐	No
2	Description	Text	255	Description of this import spec	☐	No
3	Enabled	Yes/No	1	"Yes" Enables the AutoImport program to run this Import spec	☐	No
4	Import_Spec	Memo	0	Description to the mapping of the data in the import file to the SARS database	☐	No
5	Schedule	Memo	0	Obsolete	☐	No
6	Call_Import	Yes/No	1	Obsolete	☐	No
7	Call_App_ID	Number, Long Integer	4	Obsolete	☐	No
Table: Tbl_Import_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Import ID.	☐	No
2	Import_ID	Number, Long Integer	4	The next-available number for Import ID.	☐	No
Table: Tbl_Info_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for Student Information.	☐	No
2	Info_ID	Number, Long Integer	4	The next-available ID number for Student Information.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Info_List						
1	ID	Number, Long Integer	4	The unique ID number of an Additional Information list option.	☐	No
2	Info_ID	Number, Integer	2	The unique ID number of an Additional Information question.	☐	No
3	List_Text	Text	255	The text of a list entry.	☐	No
Table: Tbl_Info_List_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for an Additional Information list.	☐	No
2	InfoListID	Number, Long Integer	4	The next-available ID number for an Additional Information list.	☐	No
Table: Tbl_Info_Location_XRef						
1	Info_ID	Number, Long Integer	4	The unique ID number of an Additional Information question.	☐	No
2	Location_ID	Number, Long Integer	4	The Location ID of the Location using the Additional Information question.	☐	No
Table: Tbl_Info_Master						
1	Info_ID	Number, Integer	2	The unique ID number of an Additional Information question.	☐	No
2	Location_ID	Number, Long Integer	4	The unique ID number of the Location.	☐	No
3	InfoDesc	Text	50	A description of a question to be display on the Additional Information screen.	☐	No
4	InfoType	Number, Integer	2	"1" = Text data, "2" = Yes/No, "3" = Date, and "4" = List.	☐	No
5	InfoFlag	Yes/No	1	"Yes" indicates that the question will be displayed on the Additional Information screen.	☐	No
6	Locked	Yes/No	1	"Yes" indicates that users in all Locations will be prevented from changing the answers to the Additional Information question.	☐	No
7	InfoPrivate	Yes/No	1	"Yes" indicates that users in other Locations will not know of the existence of this Additional Information question.	☐	No
8	PublicViewOnly	Yes/No	1	"Yes" indicates that users in other Locations may view the Additional Information, unless PRIVATE is also checked. They will be prevented from changing the answer.	☐	No
Table: Tbl_Instructor_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Instructor ID.	☐	No
2	Instructor_ID	Number, Long Integer	4	The next-available ID number for an Instructor.	☐	No
Table: Tbl_Instructor_Master						
1	Instructor_ID	Number, Long Integer	4	The unique ID for this instructor.	☐	No
2	School_ID	Text	50	The ID for the school.	☐	No
3	First_Name	Text	50	The instructor's first name.	☐	No
4	Middle_Name	Text	50	The instructor's middle name.	☐	No
5	Last_Name	Text	50	The instructor's last name.	☐	No
6	Suffix	Text	50	The suffix of the instructor's name, if any.	☐	No
7	Email_Address	Text	255	The email address of the instructor.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Language_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Language ID.	☐	No
2	Language_ID	Number, Long Integer	4	The next-available ID number for aa Language.	☐	No
Table: Tbl_Languages						
1	Language_ID	Number, Long Integer	4	The unique ID number for this language.	☐	No
2	Language	Text	50	The description of this language (e.g., Spanish).	☐	No
3	Call_Valid	Yes/No	1	"Yes" indicates that this language is valid in SARS·CALL.	☐	No
4	Trak_Valid	Yes/No	1	"Yes" indicates that this language is valid in SARS·TRAK.	☐	No
5	Font	Text	32	The font associated with this language.	☐	No

Table: Tbl_Location_Control

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Location_ID	Number, Long Integer	4	The unique ID number for the Location Code.	☐	No
2	Location_Code	Text	20	The title of the Location Code (e.g., Advising).	☐	No
3	Description	Text	50	The description of the Location Code (e.g., Advising Center).	☐	No
4	Start_Time	Date/Time	8	The Start Time on THE GRID for the Location Code (e.g. 8:00 a.m.).	☐	No
5	Stop_Time	Date/Time	8	The Stop Time on THE GRID for the Location Code (e.g. 8:00 p.m.).	☐	No
6	Start_Date	Date/Time	8	The default Start Date for an advisor's Master Schedule.	☐	No
7	Default_Code	Number, Long Integer	4	The Schedule Code used initially to start building an advisor's Master Schedule (e.g., ////).	☐	No
8	Ex_Dates_Code	Number, Long Integer	4	The Schedule Code used to represent excluded dates.	☐	No
9	LateCutoffCode	Number, Long Integer	4	The code that will be inserted in a cell for which an appointment is cancelled after the cutoff (e.g., DROPIN), if CUTOFF DAYS has been established to require a replacement code.	☐	No
10	Booked_Appt_Code	Number, Long Integer	4	The Schedule Code to be placed in cells for which a student has a booked appointment.	☐	No
11	Booked_Appt_Code_Attended	Number, Long Integer	4	The Schedule Code to be placed in booked appointment cells for which a student's attendance has been marked "Yes."	☐	No
12	Booked_Appt_Code_Not_Attended	Number, Long Integer	4	The Schedule Code to be placed in booked appointment cells for which a student's attendance has been marked "No."	☐	No
13	Appt_Length	Number, Integer	2	The shortest duration of any appointment slot on THE GRID.	☐	No
14	Do_Saturday	Yes/No	1	"Yes" indicates that Saturdays will be included on THE GRID.	☐	No
15	Do_Sunday	Yes/No	1	"Yes" indicates that Sundays will be included on THE GRID.	☐	No
16	Gen_Ex_Dates	Yes/No	1	"Yes" indicates that excluded dates will be displayed on THE GRID.	☐	No
17	History_Days	Number, Integer	2	The number of days to be displayed in History Data View.	☐	No
18	Schedule_Days	Number, Integer	2	The number of days to be displayed in Current Data View.	☐	No
19	Future_Days	Number, Integer	2	The number of days to be displayed in Future Data View.	☐	No
20	Version	Text	10	The version of the database.	☐	No
21	Primary_ID	Number, Long Integer	4	The ID number representing the Primary Student ID Format for the Location.	☐	No
22	NoteSecurity	Yes/No	1	"Yes" indicates that notepad security is activated.	☐	No
23	ODBC_DSN	Text	255	The full path and file name of the configuration file to use for the ODBC connection.	☐	No
24	ODBC_SQL	Memo	0	The SQL Statement to be used for the ODBC query.	☐	No
25	ODBC_UserName	Text	50	The ODBC user name (encrypted).	☐	No
26	ODBC_PassWord	Text	50	The password for the ODBC user (encrypted).	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
27	LateCutoffDays	Number, Integer	2	The number of days prior to an appointment after which it is too late to reschedule the appointment.	☐	No
28	Reg_User	Text	50	The registered user of the system. This is also the first line on the Default Appointment Reminder Slip Heading.	☐	No
29	Reminder2	Text	50	The second line on the Default Appointment Reminder Slip Heading.	☐	No
30	Reminder3	Text	50	The third line on the Default Appointment Reminder Slip Heading.	☐	No
31	Reminder4	Text	50	The fourth line on the Default Appointment Reminder Slip Heading.	☐	No
32	Reminder_Print_Props	Text	255	Stores the print properties for the reminder fields.	☐	No
33	Reminder_Copies	Number, Integer	2	The number of copies on the original receipt reminder.	☐	No
34	Reprint_Copies	Number, Integer	2	The number of copies on the reprint receipt reminder.	☐	No
35	Split_Grid	Yes/No	1	"Yes" indicates that THE GRID may be split into two halves for colleges that have 15 minute increments.	☐	No
36	Keep_DB_Open	Yes/No	1	"Yes" indicates that the database will be kept open (this improves performance).	☐	No
37	Auto_Refresh	Yes/No	1	"Yes" indicates that MYGRID will be refreshed automatically	☐	No
38	Arrival_Notification	Yes/No	1	"Yes" indicates that advisors will be notified of student arrival for their appointments.	☐	No
39	Lookup_Order	Yes/No	1	"Yes" indicates that the SARS database will be queried before an external database for student data.	☐	No
40	Sched_Code_Len	Number, Integer	2	The maximum Schedule Code length allowable.	☐	No
41	History_Lock	Yes/No	1	Obsolete.	☐	No
42	Current_Start	Date/Time	8	The starting date and time for the current data view.	☐	No
43	Auto_Roll	Yes/No	1	"Yes" indicates that today's date will be the starting date on THE GRID upon login.	☐	No
44	Auto_Roll_Day	Number, Integer	2	The number representing the day of the week to roll THE GRID forward (0 = daily).	☐	No
45	Allow_Multi_Reasons	Yes/No	1	"Yes" indicates that more than one reason may be used for a student' s appointment.	☐	No
46	Deleted	Yes/No	1	"Yes" indicates that this Location will be hidden.	☐	No
47	Window_Size_Before	Number, Long Integer	4	The number of minutes in the future to look for an appointment (e.g., 30, 60, 120) in SARS·TRAK.	☐	No
48	Window_Size_After	Number, Long Integer	4	The number of minutes after the start of an appointment to search for an appointment (e.g., 10, 15) in SARS·TRAK.	☐	No
49	ToolTip_Format	Number, Long Integer	4	The unique ID number to represent the format of the booked appointment tooltip.	☐	No
50	Language_ID	Number, Long Integer	4	The default language for the Location in SARS·TRAK.	☐	No
51	Require_Reason	Yes/No	1	"Yes" indicates that users must select a reason when booking an appointment.	☐	No
52	QDCMiscColumn	Yes/No	1	"Yes" indicates that a Miscellaneous Column will be displayed on the Quick Day Change screen.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
53	Use_Classes	Yes/No	1	"Yes" indicates that classes will be displayed for selection as Reason Codes.	☐	No
54	ID_Toggle	Yes/No	1	"Yes" allows users to toggle between ID formats in SARS·GRID.	☐	No
55	Allow_Email_Reminders	Yes/No	1	"Yes" indicates that email appointment reminders will be sent when appointments are booked.	☐	No
56	Counselor_Assignments	Yes/No	1	"Yes" activates the feature that permits students to be assigned automatically to advisors by alphabetical assignment. It will also enable the Short Names Assignments Report on the Table Reports menu.	☐	No
57	Reminder_Time_Range	Yes/No	1	"Yes" indicates that the appointment time range will be printed on reminder receipts.	☐	No
58	Reminder_Reasons	Yes/No	1	"Yes" indicates that the Show Reason option will be displayed on the Receipt Settings screen.	☐	No
59	ODBC_Global	Yes/No	1	For future enhansment	☐	No
60	Print_Student_ID	Yes/No	1	"Yes" prints student ID on appointment confirmations.	☐	No
61	Suppress_Student_Birth_Date	Yes/No	1	"Yes" prevents a student's birthdate from being displayed on the appointment screen.	☐	No
62	Suppress_Student_Phone	Yes/No	1	"Yes" prevents a student's phone number from being displayed on the appointment screen.	☐	No
63	Suppress_Student_Address	Yes/No	1	"Yes" prevents a student's address from being displayed on the appointment screen.	☐	No
64	Require_Student_Birth_Date	Yes/No	1	"Yes" requires a valid birth date for a student before an appointment can be committed.	☐	No
65	Require_Appt_Comments	Yes/No	1	"Yes" requires a comment to be entered before an appointment can be committed.	☐	No
66	Counselor_Desc	Text	50	The label to be used to describe counselors or advisors in the Location.	☐	No
67	Maximum_Appts	Number, Integer	2	The maximum number of appointments that a student may have pending concurrently in the system. "0" = an unlimited number of appointments will be permitted.	☐	No
68	Allow_User_Note_Templates	Yes/No	1	"Yes" permits users to create their own notepad templates.	☐	No

Table: Tbl_Location_ID

1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Location Code.	☐	No
2	Location_ID	Number, Long Integer	4	The next-available ID number for a Location Code.	☐	No

Table: Tbl_Locked

1	Counselor_ID	Number, Long Integer	4	The unique ID of the advisor whose date will be locked.	☐	No
2	Location_ID	Number, Long Integer	4	The unique ID number of the Location Code.	☐	No
3	Sched_Date	Date/Time	8	The date to be locked on THE GRID.	☐	No
4	Date_Locked	Date/Time	8	The date on which the locking occurred.	☐	No
5	User_Name	Text	30	The User Name of the individual who locked the date on THE GRID.	☐	No
6	Sched_ID	Number, Long Integer	4	The unique ID number representing the cell on the GRID.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Mapping						
1	Location_ID	Number, Long Integer	4	The ID number of the Location.	☐	No
2	Reason_Code_ID	Number, Long Integer	4	The ID number of the Reason Code	☐	No
3	New_Reason	Text	50	The replacement Reason Code.	☐	No
4	Disregard	Yes/No	1	"Yes" prevents the Reason Code from being exported.	☐	No
5	Term_ID	Yes/No	1	"Yes" identifies this Reason Code as being a Term ID.	☐	No
Table: Tbl_Master_Plan						
1	Term_ID	Number, Long Integer	4	The ID number of the Term for SARS·PLAN.	☐	No
2	Date	Date/Time	8	The date of the cell on the Master Calendar.	☐	No
3	Day_Code	Text	10	The selected Day Code for that date.	☐	No
Table: Tbl_MultiApts						
1	Sched_ID	Number, Long Integer	4	The ID of a group appointment or activity.	☐	No
2	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
3	History_ID	Number, Long Integer	4	The ID number of the history record associated with the student.	☐	No
4	Reserve	Yes/No	1	Used by eSARS and the reserver remover	☐	No
5	Reserve_Date	Date/Time	8	Used by eSARS and the reserver remover	☐	No
Table: Tbl_Note_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Note.	☐	No
2	Note_ID	Number, Long Integer	4	The next-available ID number for a Note.	☐	No
Table: Tbl_Note_Template_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Note Template.	☐	No
2	Note_Template_ID	Number, Long Integer	4	The next-available ID number for a Note Template.	☐	No
Table: Tbl_Note_Templates						
1	Note_Template_ID	Number, Long Integer	4	The ID number for a Note Template created by an advisor.	☐	No
2	Location_ID	Number, Long Integer	4	The ID number for the Location in which this Note Template will be used.	☐	No
3	Note_Template_Description	Text	50	The description of the note template.	☐	No
4	Note_Template	Memo	0	The text in the body of the note template.	☐	No
5	Counselor_ID	Number, Long Integer	4	The ID number of the advisor who created the Note Template.	☐	No

Table: Tbl_Plan_Audit_Trail

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Term_ID	Number, Long Integer	4	The ID number of a Term in SARS·PLAN.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID number of this advisor.	☐	No
3	Chg_By	Text	8	The username of the person who made the changes.	☐	No
4	User_Name	Text	8	User Name of the administrator making the changes	☐	No
5	Orig_Code	Text	10	The Day Code used prior to the change.	☐	No
6	Plan_Date	Date/Time	8	The date on the plan that contains the change.	☐	No
7	New_Code	Text	10	The replacement Day Code.	☐	No
8	Date	Date/Time	8	The date on which the Day Code was replaced.	☐	No
9	Chg_Date	Date/Time	8	The date at which the changes were make	☐	No

Table: Tbl_Plan_Control

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Plan_Control_ID	Number, Long Integer	4	The unique ID number for a plan in SARS·PLAN.	☐	No
2	Location_ID	Number, Long Integer	4	The ID number of the location associated with the plan.	☐	No
3	Min_Counselors	Number, Integer	2	The minimum number of advisors required for a day on the plan.	☐	No
4	Max_Counselors	Number, Integer	2	The maximum number of advisors needed for a day on the plan.	☐	No
5	Below_Min_Color	Text	50	The color to be used to indicate that the plan does not contain enough advisors for that day.	☐	No
6	Above_Max_Color	Text	50	The color to be used to indicate that the plan contains too many advisors for that day.	☐	No
7	In_Range_Color	Text	50	The color to be used to indicate that the number advisors for that day in within the required range.	☐	No
8	Allow_Pre_Fill	Yes/No	1	"Yes" allow sthe planner to fill all available cells with a planning code.	☐	No
9	Maintain_Audit_Trail	Yes/No	1	"Yes" automatically log all changes to an individual's plan.	☐	No
10	EveningHoursRequired	Yes/No	1	"Yes" indicates that the plan will be tracking evening hours.	☐	No
11	EveningStart	Date/Time	8	The time of the day when the evening hours starts.	☐	No
12	HoursPerWeekRequired	Currency	8	Obsolete.	☐	No
13	ExcludedDateDayCode	Text	10	The Schedule Code that identifies excluded dates (e.g. holidays).	☐	No

Table: Tbl_Plan_Counselor_Master

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Term_ID	Number, Long Integer	4	The ID number of the plan's Term.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID number of the advisor.	☐	No
3	Locked_By	Text	20	The username of the person who submitted the plan for approval.	☐	No
4	Locked_Date	Date/Time	8	The submission date of the plan.	☐	No
5	Accepted_Date	Date/Time	8	The date on which the plan was accepted by an administrator.	☐	No
6	Status	Text	1	The current status of the plan (e.g., open, submitted, accepted).	☐	No
7	Orig_Locked_Date	Date/Time	8	The first date on which the plan was submitted.	☐	No
8	Orig_Accepted_Date	Date/Time	8	The first date on which the plan was accepted.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Plan_Day_Codes						
1	Plan_Control_ID	Number, Long Integer	4	The ID number of a Plan in SARS·PLAN.	☐	No
2	Day_Code	Text	10	The name of a Day Code used for planning.	☐	No
3	Day_Code_Desc	Text	50	The description of the Day Code used for planning.	☐	No
4	Day_Colors	Text	50	The color of the Day Code used for planning.	☐	No
5	Day_Value	Number, Long Integer	4	Whether work credit will be available when using the associated day code. “1”= work credit will be given; “0” = work credit will not be given.	☐	No
6	Hour_Value	Currency	8	The amount of work credit that an advisor typically receives in hours when using the Day Code.	☐	No
7	Allow_Sched	Yes/No	1	"Yes"allows planners to override the Day Code with a planning Day Code when creating work plans. If this option is checked, a day with a Day Value of “0” may be changed to a workday,	☐	No
8	PlanningDayCode	Yes/No	1	"Yes" allows the Day Code to be used by advisors for planning purposes. For example, WORKDAY and FLEX may be designated as planning days.	☐	No
Table: Tbl_Plan_Start_Stop_Dates						
1	Term_ID	Number, Long Integer	4	The ID number of the Term to which the plan applies.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID number of the advisor to whom the plan applies.	☐	No
3	Start_Date	Date/Time	8	The Start Date of the advisor's plan, if different from the Term Start Date.	☐	No
4	Stop_Date	Date/Time	8	The Stop Date of the advisor's plan, if different from the Term Stop Date.	☐	No
Table: Tbl_Plan_Term_ID						
1	ID	Number, Long Integer	4	This is a system-generated unique number for a Plan Term.	☐	No
2	Term_ID	Number, Long Integer	4	The next available ID number of a Plan Term.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Plan_Terms						
1	Term_ID	Number, Long Integer	4	The ID number of a Term in SARS·PLAN.	☐	No
2	Term_Desc	Text	20	A description of the Term.	☐	No
3	Plan_Control_ID	Number, Long Integer	4	The unique ID number for a plan.	☐	No
4	Start_Date	Date/Time	8	The Start Date of the Term.	☐	No
5	Stop_Date	Date/Time	8	The Stop Date of the Term.	☐	No
6	Saturday	Yes/No	1	"Yes" makes Saturdays available for inclusion as a workday for advisors.	☐	No
7	Sunday	Yes/No	1	"Yes" makes Sundays available for inclusion as a workday for advisors.	☐	No
8	Days_Required	Number, Long Integer	4	The standard minimum number of days that advisors must work during the term.	☐	No
9	Hours_Required	Number, Long Integer	4	The standard minimum number of hours that advisors must work during the term.	☐	No
10	Released	Yes/No	1	"Yes" indicates that the Master Calendar for the term has been released to advisors for planning.	☐	No
11	Archived	Yes/No	1	"Yes" stores a Term in the archive so that it will no longer be displayed on any screens nor included in any reports.	☐	No
12	Use_Templates	Yes/No	1	"Yes" looks at the advisor's master schedule templates to calculate the number of hours for a day.	☐	No
Table: Tbl_Plan_Time_Exceptions						
1	Term_ID	Number, Long Integer	4	The ID number of the Term.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID number of the advisor associated with the Term Exception.	☐	No
3	Exception_Date	Date/Time	8	The Date of the Term Exception.	☐	No
4	Start_Time	Date/Time	8	The Start Time of the Term Exception.	☐	No
5	Stop_Time	Date/Time	8	The Stop Time of the Term Exception.	☐	No
Table: Tbl_Plan_User_Xref						
1	User_Name	Text	20	The name of the user in SARS·PLAN.	☐	No
2	Plan_Control_ID	Number, Long Integer	4	The unique ID number for a plan.	☐	No
3	Has_Plan	Yes/No	1	"Yes" specifies that the user has a plan.	☐	No
4	Days_Required	Number, Long Integer	4	The number of days that the user is required to fill in his plan.	☐	No
5	Hours_Required	Number, Long Integer	4	The number of hours that the user is required to fill in his plan.	☐	No
Table: Tbl_Print_ID						
1	ID	AutoNumber, Long Integer, Increment	4	Obsolete.	☐	No
2	Print_ID	Number, Long Integer	4	Obsolete.	☐	No
Table: Tbl_Reason_Counselor_XRef						
1	Reason_Code_ID	Number, Long Integer	4	The ID number of the Reason Code.	☐	No
2	Counselor_ID	Number, Long Integer	4	The ID number of the Advisor linked to the Reason Code.	☐	No
Table: Tbl_Reason_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Reason Code.	☐	No
2	Reason_ID	Number, Long Integer	4	The next-available ID number for a Reason Code.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Reasons						
1	ID	Number, Long Integer	4	The ID number for a Reason Code in SARS·TRAK.	☐	No
2	Reason_Code	Text	20	The name of this Reason Code.	☐	No
3	Location_ID	Number, Long Integer	4	The ID number for the Location in which this Reason Code is being used.	☐	No
4	Reason_Desc	Text	50	A description of the Reason Code.	☐	No
5	Default_Duration	Number, Long Integer	4	The default duration in minutes for the classes related to Course Labs.	☐	No
6	Default_Cutoff	Number, Long Integer	4	The maximum duration for all classes related to Course Labs.	☐	No
7	Reason_Message	Text	255	The reason message that will be displayed if an associated reason is selected.	☐	No
8	Course	Yes/No	1	"Yes" indicates that this Reason Code is a course.	☐	No
9	Archived	Yes/No	1	"Yes" indicates that this Reason Code is archived and no longer available for use.	☐	No
Table: Tbl_Record_Sources						
1	Record_Source_ID	Number, Long Integer	4	The ID number of the record source.	☐	No
2	Record_Source	Text	50	The name of the record source (e.g., GRID A).	☐	No
3	Description	Text	255	A description of the record source (e.g., GRID, Web, TRAK, etc.).	☐	No
Table: Tbl_Required_Courses						
1	Button_ID	Number, Long Integer	4	The ID number of the Button.	☐	No
2	Section_ID	Number, Long Integer	4	The ID number of the course Section.	☐	No
3	In_Use	Yes/No	1	"Yes" indicates that this Button is being used.	☐	No
Table: Tbl_SARS_Format_Location_XRef						
1	Location_ID	Number, Long Integer	4	Obsolete.	☐	No
2	Format_ID	Number, Long Integer	4	Obsolete.	☐	No
Table: Tbl_Sched_Code_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for this Schedule Code.	☐	No
2	Sched_Code_ID	Number, Long Integer	4	The next-available ID number for this Schedule Code.	☐	No
Table: Tbl_Sched_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Schedule ID.	☐	No
2	Sched_ID	Number, Long Integer	4	The next-available number for Schedule ID.	☐	No

Table: Tbl_Schedule_Code_Props

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Sched_Code_ID	Number, Long Integer	4	The ID number for the Schedule Code.	☐	No
2	Location_ID	Number, Long Integer	4	The ID number for the Location using the Schedule Code.	☐	No
3	Sched_Code	Text	20	The name of the Schedule Code.	☐	No
4	Description	Text	50	A description of the Schedule Code.	☐	No
5	Allow_Sched	Yes/No	1	"Yes" indicates that the Schedule Code will allow appointments to be made.	☐	No
6	Attendance_Default	Text	1	Whether the initial attendance status will start out as YES (attended), NO (did not attend), or NOT MARKED (attendance not yet recorded).	☐	No
7	Print_Receipt_default	Yes/No	1	"Yes" prints an appointment confirmation receipt by default for this type of appointment.	☐	No
8	Pull_Transcripts_Default	Yes/No	1	"Yes" requires that the Pull Transcripts option will be checked by default for this type of appointment.	☐	No
9	Require_Initials	Yes/No	1	"Yes" requires that users enter their initials when confirming this type of appointment.	☐	No
10	Max_Students	Number, Integer	2	The maximum number of students that may be permitted to enroll in a group appointment.	☐	No
11	Duration	Number, Integer	2	The default duration, in minutes, for this Schedule Code.	☐	No
12	PLAN_AllowUse	Yes/No	1	"Yes" indicates that this Schedule Code may be used for creating schedules in SARS·PLAN.	☐	No
13	PLAN_UseInChart	Yes/No	1	"Yes indicates that the Schedule Code will count toward the total hours calculation in SARS·PLAN.	☐	No
14	BackColor	Number, Long Integer	4	The number representing the background color for the Schedule Code.	☐	No
15	ForeColor	Number, Long Integer	4	The number representing the font color for the Schedule Code.	☐	No
16	FontBold	Yes/No	1	"Yes" indicates that the font for this Schedule Code will be displayed in Bold type.	☐	No
17	FontItalic	Yes/No	1	"Yes" indicates that the font for this Schedule Code will be displayed in Italics.	☐	No
18	FontUnderline	Yes/No	1	"Yes" indicates that the font for this Schedule Code will be underlined.	☐	No
19	Allow_Meeting	Yes/No	1	"Yes" indicates that this Schedule Code may be superceded by a valid meeting code when scheduling a meeting using SARS·MEETING MAKER	☐	No
20	Valid_Meeting_Code	Yes/No	1	"Yes" indicates that the Schedule Code may be used by SARS·MEETING MAKER to designate a scheduled meeting.	☐	No
21	Clear_Reasons	Yes/No	1	"Yes" de-selects all reasons when booking students into a group appointment, each with different reasons.	☐	No
22	Archived	Yes/No	1	"Yes" indicates that this Schedule Code is archived and will be unavailable for use.	☐	No
23	Email_Receipt_Default	Yes/No	1	"Yes" indicates that, by default, appointment confirmation receipts will be sent via email.	☐	No
24	Prevent_Overwrite	Yes/No	1	"Yes" retains any Schedule Code that should never be overwritten when re-adding a Master Schedule within the designated date range.	☐	No

Table: Tbl_SCode_ACode_Chg_XRef

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Schedule_Code_ID	Number, Long Integer	4	The ID number of the Schedule Code.	☐	No
2	Access_Code_ID	Number, Long Integer	4	The ID number of the Access Code associated with the Schedule Code.	☐	No

Table: Tbl_Section_ID

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a course Section.	☐	No
2	Section_ID	Number, Long Integer	4	The next-available ID number for a course Section.	☐	No

Table: Tbl_Section_Instructor_XRef

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Section_ID	Number, Long Integer	4	The ID number of the course Section.	☐	No
2	Instructor_ID	Number, Long Integer	4	The ID number of the instructor for the course Section.	☐	No
3	Active_Date	Date/Time	8	The date the instructor was assigned to the course Section.	☐	No

Table: Tbl_Section_Master

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Section_ID	Number, Long Integer	4	The ID number of a class Section.	☐	No
2	Course_ID	Number, Long Integer	4	The ID number of the Course related to this Section.	☐	No
3	Term_ID	Number, Long Integer	4	The ID number of the term for this Course and Section.	☐	No
4	Section_Name	Text	50	The name of the course Section.	☐	No
5	Description	Text	50	A description of the course Section.	☐	No
6	Lab_Required	Yes/No	1	"Yes" indicates that a lab is required for the course Section.	☐	No
7	Lab_Hours	Currency	8	The number of hours by arrangement.	☐	No
8	Meet_Schedule	Text	255	Days of the week for the course Section.	☐	No
9	Course_Type_ID	Number, Long Integer	4	The ID number for the type of Course.	☐	No
10	Units_Min	Currency	8	The minimum number of units supported by the course Section.	☐	No
11	Units_Max	Currency	8	The maximum number of units supported by the course Section.	☐	No
12	Meeting_Time	Text	12	The time range for the course Section.	☐	No
13	Alt_Section_ID	Text	50	The secondary Section ID.	☐	No
14	Section_Start_Date	Date/Time	8	The start date of the course Section.	☐	No
15	Section_Stop_Date	Date/Time	8	The stop date of the course Section.	☐	No
16	Additional_Hours	Currency	8	The number of hours allowed above the hours by arrangement.	☐	No

Table: Tbl_Staff_Applications

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Staff_ID	Number, Long Integer	4	Obsolete	☐	No
2	Name	Text	50	Obsolete	☐	No
3	Description	Text	50	Obsolete	☐	No
4	Disabled	Yes/No	1	Obsolete	☐	No
5	Show_Percent	Currency	8	Obsolete	☐	No
6	NoShow_Percent	Currency	8	Obsolete	☐	No
7	Notmarked_Percent	Currency	8	Obsolete	☐	No

Table: Tbl_Staff_Category_ID

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	AutoNumber, Long Integer, Increment	4	Obsolete	☐	No
2	Category_ID	Number, Long Integer	4	Obsolete	☐	No

Table: Tbl_Staff_Category_Master

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Category_ID	Number, Long Integer	4	Obsolete	☐	No
2	Name	Text	50	Obsolete	☐	No
3	Description	Text	50	Obsolete	☐	No
4	Disabled	Yes/No	1	Obsolete	☐	No
5	Staff_Id	Number, Long Integer	4	Obsolete	☐	No
6	Hourly_Rate	Currency	8	Obsolete	☐	No
7	Column_Order	Text	1	Obsolete	☐	No
8	PrimaryAssoc	Number, Long Integer	4	Obsolete	☐	No
9	Associate1	Number, Long Integer	4	Obsolete	☐	No
10	Associate2	Number, Long Integer	4	Obsolete	☐	No
11	Primary_percent	Currency	8	Obsolete	☐	No
12	Associate1_Percent	Currency	8	Obsolete	☐	No
13	Associate2_percent	Currency	8	Obsolete	☐	No
14	Budget_Amount	Currency	8	Obsolete	☐	No

Table: Tbl_Staff_Category_Reason_Xref

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Category_ID	Number, Long Integer	4	Obsolete	☐	No
2	Reason_Code_ID	Number, Long Integer	4	Obsolete	☐	No
3	Location_ID	Number, Long Integer	4	Obsolete	☐	No

Table: Tbl_Staff_Category_Sched_Code_Xref

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Category_ID	Number, Long Integer	4	Obsolete	☐	No
2	Sched_Code_ID	Number, Long Integer	4	Obsolete	☐	No
3	Location_ID	Number, Long Integer	4	Obsolete	☐	No

Table: Tbl_Staff_Location_Xref

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Staff_ID	Number, Long Integer	4	Obsolete	☐	No
2	Location_Id	Number, Long Integer	4	Obsolete	☐	No

Table: Tbl_Staff_Members

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Counselor_ID	Number, Long Integer	4	Obsolete	☐	No
2	Mbr_ID	Text	20	Obsolete	☐	No
3	Mbr_Name	Text	50	Obsolete	☐	No
4	Addr1	Text	30	Obsolete	☐	No
5	Addr2	Text	30	Obsolete	☐	No
6	City	Text	20	Obsolete	☐	No
7	State	Text	2	Obsolete	☐	No
8	Zip	Text	10	Obsolete	☐	No
9	e_mail	Text	255	Obsolete	☐	No
10	Contact_Phone	Text	14	Obsolete	☐	No
11	Alt_Phone	Text	14	Obsolete	☐	No
12	Active	Yes/No	1	Obsolete	☐	No
13	Comments	Text	255	Obsolete	☐	No
14	Hourly_Rate	Currency	8	Obsolete	☐	No

Table: Tbl_Staff_Reports

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Location_ID	Number, Long Integer	4	Obsolete	☐	No
2	Location_Code	Text	20	Obsolete	☐	No
3	Sched_Date	Date/Time	8	Obsolete	☐	No
4	Counselor_ID	Number, Long Integer	4	Obsolete	☐	No
5	Counselor_Name	Text	30	Obsolete	☐	No
6	Start_Time	Date/Time	8	Obsolete	☐	No
7	Stop_Time	Date/Time	8	Obsolete	☐	No
8	Pay_Rate	Currency	8	Obsolete	☐	No
9	Duration	Number, Integer	2	Obsolete	☐	No
10	Report_Position	Number, Integer	2	Obsolete	☐	No
11	Source	Number, Integer	2	Obsolete	☐	No
12	Sort_Name	Text	30	Obsolete	☐	No
13	Student_ID	Number, Long Integer	4	Obsolete	☐	No
14	SSN	Text	20	Obsolete	☐	No
15	Full_Name	Text	50	Obsolete	☐	No
16	Attend_Flag	Text	1	Obsolete	☐	No
17	Sched_Code_ID	Number, Long Integer	4	Obsolete	☐	No
18	Reason_Code_ID	Number, Long Integer	4	Obsolete	☐	No
19	Category_ID	Number, Long Integer	4	Obsolete	☐	No
20	Activity	Text	50	Obsolete	☐	No
21	Staff_ID	Number, Long Integer	4	Obsolete	☐	No
22	Reason_Code	Text	20	Obsolete	☐	No

Table: Tbl_Staff_Security

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Staff_ID	Number, Long Integer	4	Obsolete	☐	No
2	User_Name	Text	20	Obsolete	☐	No

Table: Tbl_Student_Alerts

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	Number, Long Integer	4	The unique ID number for an Alert.	☐	No
2	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
3	Location_ID	Number, Long Integer	4	The ID number for the Location Code.	☐	No
4	Alert_Desc	Memo	0	A description of the Alert.	☐	No
5	Early_Alert	Yes/No	1	"Yes" indicates that this is an Early Alert.	☐	No
6	Early_Alert_ID	Number, Long Integer	4	The ID number of this Early Alert.	☐	No
7	Early_Alert_Complete	Yes/No	1	"Yes" indicates that the Early Alert conditions were satisfied.	☐	No
8	Create_Date	Date/Time	8	The date and time the Alert was created.	☐	No
9	Early_Alert_Course	Text	255	The name of the course about which the Early Alert pertains.	☐	No
10	Alert_Type_ID	Number, Long Integer	4	The number of the alert type (e.g., Global, Primary, Standard. or Student).	☐	No
11	User_Name	Text	20	The user name or initials of the person who created the Alert.	☐	No
12	Modify_Date	Date/Time	8	The date and time that the Alert was modified.	☐	No

Table: Tbl_Student_Courses

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
2	Course_ID	Number, Long Integer	4	The ID number of the Course.	☐	No
3	Section_ID	Number, Long Integer	4	The ID number of the Section for the Course.	☐	No
4	Alt_Section_ID	Text	50	The alternate ID number of the Section for the Course.	☐	No
5	Do_Not_Delete	Yes/No	1	"Yes" specifies that the auto import process will not drop this record.	☐	No
6	Units_Actual	Currency	8	The number of units for a Course.	☐	No
7	Processing	Yes/No	1	"Yes" indicates that the import process is currently running.	☐	No
8	Dropped	Yes/No	1	"Yes" indicates that a course was dropped.	☐	No
9	Dropped_Date	Date/Time	8	The date that the course was dropped.	☐	No
10	Manual	Yes/No	1	Enter Manually from SARS·TRAK - One Day Pass	☐	No
11	Enroll_Date	Date/Time	8	Date that the student enrolled in the course.	☐	No

Table: Tbl_Student_History

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	History_ID	Number, Long Integer	4	The unique number for this history record.	☐	No
2	Student_ID	Number, Long Integer	4	SARS·GRID student ID number.	☐	No
3	Sched_ID	Number, Long Integer	4	The ID number of the cell on THE GRID.	☐	No
4	Counselor_ID	Number, Long Integer	4	The ID number of the advisor for this history record.	☐	No
5	Sched_Date	Date/Time	8	The date of this appointment or activity for this history record.	☐	No
6	Sched_Time	Date/Time	8	The time of this appointment or activity for this history record.	☐	No
7	Location_ID	Number, Long Integer	4	The unique ID number of the Location.	☐	No
8	Comments	Text	255	Comments written about the appointment or activity.	☐	No
9	Attend_Flag	Text	1	Indicates whether the student attended the appointment.	☐	No
10	Activity	Text	1	Indicates whether the activity is an appointment, an appointment that has been moved, or an appointment that has been cancelled. appointment, an appointment which has been moved, or an appointment which has been canceled	☐	No
11	Activity_Date_Time	Date/Time	8	The date and time the appointment was made.	☐	No
12	User_Name	Text	20	The name or initials of the user who made, moved or cancelled the appointment.	☐	No
13	Cancelled_Flag	Yes/No	1	Indicates whether the appointment or activity was cancelled.	☐	No
14	Pull_Transcripts	Yes/No	1	"Yes" specifies that a student's transcripts should be pulled for the appointment.	☐	No
15	Start_Time	Date/Time	8	The start date and time for an appointment or activity.	☐	No
16	Stop_Time	Date/Time	8	The stop date and time for an appointment or activity.	☐	No
17	Sched_Code_ID	Number, Long Integer	4	The ID number of the Schedule Code.	☐	No
18	Trak_Button_ID	Number, Long Integer	4	The ID number of this button in SARS·TRAK.	☐	No
19	Trak_CheckIN	Yes/No	1	"Yes" specifies that the student is still checked-in.	☐	No
20	Export_Status_ID	Number, Long Integer	4	0 = not exported; 2 = exported.	☐	No
21	Export_Date	Date/Time	8	Date of the export.	☐	No
22	Early_Alert_ID	Number, Long Integer	4	The ID number of an Early Alert.	☐	No
23	Record_Source_ID	Number, Long Integer	4	The source of the appointment or activity.	☐	No
24	Waitlist_Status_ID	Number, Long Integer	4	Used by the Waiting List program to manager a students status in the wait list.	☐	No
25	Checkin_Time	Date/Time	8	The checkin date and time.	☐	No
26	Checkout_Time	Date/Time	8	The checkout date and time.	☐	No

Table: Tbl_Student_ID

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Student ID.	☐	No
2	Student_ID	Number, Long Integer	4	The next available number for Student ID.	☐	No

Table: Tbl_Student_ID_XRef

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
2	Alt_ID	Text	50	The college'supplied Student ID.	☐	No
3	Format_ID	Number, Long Integer	4	The format of the student ID number.	☐	No

Table: Tbl_Student_Info

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number associated with an Additional Information question.	☐	No
2	Info_ID	Number, Integer	2	The ID number of an Additional Information question.	☐	No
3	InfoText	Text	255	The text that is displayed on Additional Information for the student.	☐	No
4	Add_Date	Date/Time	8	The date that additional information was added for the student.	☐	No
5	Add_Source	Number, Integer	2	How the additional information question was added to the system.	☐	No
6	Added_By	Text	20	The name or initials of the user who added additional information for the student.	☐	No
7	Modify_Date	Date/Time	8	The date that additional information was modified for the student.	☐	No
8	Modify_Source	Number, Integer	2	How the changed information was added to the system.	☐	No
9	Modified_By	Text	20	The name of the user who modified the information.	☐	No

Table: Tbl_Student_Master

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
2	Full_Name	Text	50	The full name of the student.	☐	No
3	Birth_Date	Text	10	The birth date of the student.	☐	No
4	Perm_Phone	Text	14	The student's permanent phone number.	☐	No
5	Perm_Ext	Text	6	The extension for the permanent phone number.	☐	No
6	Contact_Phone	Text	14	The student's contact phone number.	☐	No
7	Contact_Ext	Text	6	The extension for the contact phone number.	☐	No
8	Addr1	Text	50	First address line for the student.	☐	No
9	Addr2	Text	50	Additional address line for the student.	☐	No
10	City	Text	20	City of student's address.	☐	No
11	State	Text	20	State of student's address.	☐	No
12	Zip	Text	10	Zip code of student's address.	☐	No
13	e_Mail	Text	255	Student's email address.	☐	No
14	Call_Student	Yes/No	1	"Yes" enables the system to call the student for appointment reminders.	☐	No
15	eMail_Student	Yes/No	1	"Yes" enables the system to email the student for appointment reminders.	☐	No
16	Update_Date	Date/Time	8	Date of the last update to the student record.	☐	No
17	Last_Import_Date	Date/Time	8	The most recent date that the student's data was imported into the SARS·GRID database.	☐	No
18	Deleted	Yes/No	1	"Yes" indicates that the student was deleted from the system (this will "hide" the student).	☐	No
19	Language_ID	Number, Long Integer	4	Language preference of the student.	☐	No
20	Add_Source	Number, Integer	2	How the record added to the database (e.g., import, manual, etc.).	☐	No
21	Update_Source	Number, Integer	2	How the record updated or changed.	☐	No
22	Date_Added	Date/Time	8	The date the record was added to the system.	☐	No
23	Pin_Number	Text	50	The secondary piece of information for login security.	☐	No
24	First_Name	Text	50	The student's first name.	☐	No
25	Middle_Name	Text	50	The student's middle name.	☐	No
26	Last_Name	Text	50	The student's last name.	☐	No
27	Suffix	Text	50	The suffix of the student's name (e.g., Jr, III).	☐	No
28	e_Mail2	Text	255	A second email address for the student.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_Student_Notes						
1	Note_ID	Number, Long Integer	4	The ID number for a Note.	☐	No
2	Location_ID	Number, Long Integer	4	The number of the Location in which the Note is written.	☐	No
3	Student_ID	Number, Long Integer	4	The SARS·GRID student ID number about whom a Note is written.	☐	No
4	Counselor_ID	Number, Long Integer	4	The ID number of the advisor who is the author of a Note.	☐	No
5	Sched_Date	Date/Time	8	Obsolete.	☐	No
6	Sched_Notes	Memo	0	The body of the Note.	☐	No
7	Note_Desc	Text	50	Summary of the contents of the Note.	☐	No
8	Note_Security	Yes/No	1	"Yes" allows only the author of a Note to view it.	☐	No
9	User_Name	Text	50	The SARS username of the author of the Note.	☐	No
10	Create_Date	Date/Time	8	The date and time that a Note was created.	☐	No
Table: Tbl_System_Control						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for System Control.	☐	No
2	DB_Version	Text	50	The version of the SARS database.	☐	No
3	Lic_User	Text	255	The user license.	☐	No
4	Default_Password	Text	20	The Default Password.	☐	No
5	Lic_Key	Text	50	The license key.	☐	No
6	Min_TRAK_Ver	Text	50	The oldest version of SARS·TRAK with which this database is compatible.	☐	No
7	Min_GRID_Ver	Text	50	The oldest version of SARS·GRID with which this database is compatible.	☐	No
8	Phone_Number_Format	Text	50	The format used for phone numbers.	☐	No
9	Birth_Date_Format	Text	50	The format used for birth dates.	☐	No
Table: Tbl_Template_Detail_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Template Detail.	☐	No
2	Detail_ID	Number, Long Integer	4	The next-available ID number for a Template Detail.	☐	No
Table: Tbl_Template_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for an Advisor Template.	☐	No
2	Template_ID	Number, Long Integer	4	The next-available ID number for an Advisor Template.	☐	No
Table: Tbl_Term_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Term ID.	☐	No
2	Term_ID	Number, Long Integer	4	The next-available number for Term ID.	☐	No
Table: Tbl_Term_Master						
1	Term_ID	Number, Long Integer	4	The ID number of a Term.	☐	No
2	Description	Text	255	A description of the Term (e.g., Fall 2012).	☐	No
3	Start_Date	Date/Time	8	The Start Date of the term.	☐	No
4	Stop_Date	Date/Time	8	The Stop Date of the term.	☐	No
5	Active	Yes/No	1	"Yes" indicates that the term is active.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_TermIDs						
1	Location_ID	Number, Long Integer	4	Obsolete.	☐	No
2	Term_ID	Text	20	Obsolete.	☐	No
3	Reason_Code_ID	Number, Long Integer	4	Obsolete.	☐	No
4	Start_Date	Date/Time	8	Obsolete.	☐	No
5	End_date	Date/Time	8	Obsolete.	☐	No
Table: Tbl_Trak_Access_Codes						
1	Access_ID	Number, Long Integer	4	Obsolete.	☐	No
2	TrakAccess	Yes/No	1	Obsolete.	☐	No
3	TrakManualEntry	Yes/No	1	Obsolete.	☐	No
4	TrakAdmin	Yes/No	1	Obsolete.	☐	No
5	TrakSecurity	Yes/No	1	Obsolete.	☐	No
6	TrakReports	Yes/No	1	Obsolete.	☐	No
Table: Tbl_TRAK_Format_Application_XRef						
1	Application_ID	Number, Long Integer	4	Application ID of the Application	☐	No
2	Format_ID	Number, Long Integer	4	Format ID for this Application	☐	No
Table: Tbl_Trak_hrID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for Lab Hours in SARS·TRAK.	☐	No
2	LabHours_ID	Number, Long Integer	4	The next-available ID number for Lab Hours.	☐	No
Table: Tbl_Trak_OpenLabHrs						
1	Application_ID	Number, Long Integer	4	The ID number of the SARS·TRAK application.	☐	No
2	Export_ID	Text	50	ID associated with this lab for export purposes.	☐	No
3	Lab_Start	Date/Time	8	The Start Time for the Lab.	☐	No
4	Lab_Stop	Date/Time	8	The Stop Time for the Lab.	☐	No
5	LabHours_ID	Number, Long Integer	4	The ID number tied to the Lab Hours record.	☐	No
6	DOW	Number, Long Integer	4	The Day of the Week (1 = Sunday, etc.).	☐	No
Table: Tbl_Trak_Response						
1	Student_ID	Number, Long Integer	4	The SARS·GRID Student ID number.	☐	No
2	Msg_ID	Number, Long Integer	4	The ID number of this message.	☐	No
3	Response_Date	Date/Time	8	The date of the response to this message.	☐	No
4	Response	Yes/No	1	"Yes" indicates that a response was given for this message.	☐	No
5	Course_ID	Number, Long Integer	4	The ID number of the course related to this message.	☐	No
6	Application_ID	Number, Long Integer	4	The ID number of the application related to this message.	☐	No
Table: Tbl_Trak_User_App_XRef						
1	Application_ID	Number, Long Integer	4	SARS·TRAK Application ID number.	☐	No
2	Access_ID	Number, Long Integer	4	The ID number of the Access Code for the SARS·TRAK user.	☐	No
3	User_Name	Text	50	The name of the SARS·TRAK user.	☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: Tbl_User_Location_XRef						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for User Location ID.	☐	No
2	User_Name	Text	50	The User Name.	☐	No
3	Location_ID	Number, Long Integer	4	The ID number for the Location Codes to which the user has access.	☐	No
4	Access_ID	Number, Long Integer	4	The ID number of the Access Code for the Location Code to which the user has access.	☐	No
Table: Tbl_Users						
1	User_Name	Text	20	The log on User Name.	☐	No
2	Password	Text	20	The log on Password.	☐	No
3	Full_Name	Text	50	The Full Name of the user.	☐	No
4	Access_ID	Number, Long Integer	4	The ID number of the user's Access Code.	☐	No
5	Location_ID	Number, Long Integer	4	The primary (default) Location to which the user is assigned	☐	No
6	Counselor_ID	Number, Long Integer	4	The ID number of the advisor (1 = ALL and 0 = NONE).	☐	No
7	Super_User	Yes/No	1	"Yes" allows the user complete access to all features of the application.	☐	No
8	Expiration_Date	Date/Time	8	Date after which the user will no longer have access to THE GRID.	☐	No
9	Use_Expiration_Date	Yes/No	1	"Yes" allows an Expiration Date to be used.	☐	No
Table: Tbl_Walkin_ID						
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique ID number for a Walkin student.	☐	No
2	Walkin_ID	Number, Long Integer	4	The next-available ID number for a Walkin student.	☐	No
Table: Tbl_Walkin_Reasons						
1	Walkin_ID	Number, Long Integer	4	The ID number of the Walkin visit.	☐	No
2	Reason_Code_ID	Number, Long Integer	4	The ID number of the Reason for the Walkin visit.	☐	No
3	Section_ID	Number, Long Integer	4	The ID number of the course Section, if classes are used as reasons, related to the Walkin visit.	☐	No

Table: Tbl_WalkIns

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Walkin_ID	Number, Long Integer	4	The ID number for the walkin visit.	☐	No
2	Location_ID	Number, Long Integer	4	The ID number for the Location Code associated with the walkin visit.	☐	No
3	Sched_Date	Date/Time	8	The date of the Walkin visit.	☐	No
4	Student_ID	Number, Long Integer	4	The SARS·GRID student ID number.	☐	No
5	Arrival_Time	Date/Time	8	The time the student checked in.	☐	No
6	Serviced_Time	Date/Time	8	The time the student was seen by an advisor.	☐	No
7	Counselor_ID	Number, Long Integer	4	The ID number of the advisor selected for this visit (0 = ANY).	☐	No
8	Comments	Text	255	The text of any special comments for the visit.	☐	No
9	Walkin_Status	Text	10	Status of this walkin (e.g., Waiting, Seen, Cancelled).	☐	No
10	Completed	Yes/No	1	"Yes" indicates that the visit was completed or deleted.	☐	No
11	History_ID	Number, Long Integer	4	The ID number for this walkin record in student history.	☐	No
12	Auto_Post	Yes/No	1	Obsolete.	☐	No
13	Early_Alert_ID	Number, Long Integer	4	The ID number for the Early Alert, if that is the reason for the walkin visit.	☐	No
14	Checkout_Time	Date/Time	8	The time that the student completed the walkin visit.	☐	No

Table: Tbl_Web_Errors

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	ID	AutoNumber, Long Integer, Increment	4	This is a system-generated unique number for Web Errors ID.	☐	No
2	Err_Date	Date/Time	8	The date and time of the web error.	☐	No
3	Err_File	Text	255	Name of Code Module that contains the function where error occured	☐	No
4	Err_Function	Text	255	Function Name	☐	No
5	Err_Line	Text	255	Line Number	☐	No
6	Err_Build	Text	255	Build Number	☐	No
7	Err_Message	Text	255	Error Message	☐	No

Table: Tbl_Web_Settings

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
1	Location_ID	Number, Long Integer	4	The ID number of the Location.	☐	No
2	Student_ID	Yes/No	1	"Yes" displays the SARS·GRID Student ID number in the web interface.	☐	No
3	Student_Name	Yes/No	1	"Yes" displays the student's name.	☐	No
4	Student_Phone	Yes/No	1	"Yes" displays the student's phone number.	☐	No
5	Appointment_Comments	Yes/No	1	"Yes" includes appointment comments on the display.	☐	No
6	Reasons	Yes/No	1	"Yes" includes appointment reasons on the display.	☐	No

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