



Admissions Maintenance

Three Rivers Systems, Inc

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Abstract

This document is designed to provide you with information necessary to maintain Admissions information. The following topics are discussed:

- Organizations
- Organizations reports
- Contacts
- Contact reports
- High school lookup tables
- College lookup tables
- Communications Management

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Organization Maintenance

The Organization maintenance window is the central location where information about organizations is stored and maintained. An organization is defined as any non-person entity associated with your institution. This area holds name, address, contact, and chosen activities.



Step-by-Step: Add an Organization

1. From the **CAMS Enterprise Home page**, click **Admissions >Organizations >Add**. The Organization window opens with the **Organization** tab displayed.

Figure 1: Organization window

2. Supply the organization name, address, and communications information.
3. Select a **Category** and **Type** for the organization from the drop down lists.
4. Complete the **Last Contact Person** and **Last Contact Date** fields. Organization information will be saved when you exit the page.



Step-by-Step: Add a Contact to an Organization

1. After adding an organization, click the **Contacts** tab to add contact information for the organization (or click **Admissions >Organizations >Change** to open the Find Organization window, then enter the appropriate criteria to locate the organization for which you wish to add contact information).
2. Right-click on the data grid to access the Contact entry form.

Figure 2: Contacts window

3. Supply contact's name, title and communications information.
4. Click **Add** to save this information, or **Cancel** to exit without saving. This process may be repeated for an unlimited number of contacts.



Step-by-Step: Add a Comment to an Organization

1. From the **CAMS Enterprise Home page**, click **Admissions >Organization >Add**. The Organization window opens with the Organization tab displayed. Click the **Comment** tab.
2. Type comments in the text box. This field does not restrict the amount of text entered. Comments will be saved when you exit the page.



Step-by-Step: Add an Activity to an Organization

1. From the **CAMS Enterprise Home page**, click **Admissions >Organization >Add**. The Organization window opens with the Organization tab displayed. Click the **Activity** tab.
2. Right-click on the data grid to access the Activity entry form.

Figure 3: Organization Activity window

3. Supply activity Due Date, Activity, Document (if applicable), and any notes. When the activity is completed, supply the Completion Date title and communications information.
4. Click **Add** to save this information, or **Cancel** to exit without saving. This process may be repeated for an unlimited number of activities.

Organization BYOR

Generating Organization Reports

If you have reviewed the General documentation which covers BYOR, you already have a good understanding of how this feature in CAMS operates. To begin, BYOR is a location in CAMS where you **Build Your Own Reports**. In the Organization BYOR, specific criteria is selected that will narrow the group of organizations for which you are reporting.



Step-By-Step: Generate BYOR Reports

1. Open the Organization BYOR Criteria Selection window by clicking **Admissions > Organizations > Reports > BYOR**.
2. Select desired criteria. There are two pages of criteria from which to narrow your group of organizations. The first page focuses on basic organization information, while the second pages focuses on selecting students associated with organizations during a specific time frame. The more items selected, generally the narrower the grouping.

The screenshot shows the Admissions BYOR window with the following fields and values:

- Organization ID: [Empty text box]
- Name From: [Empty text box]
- Name To: [Empty text box]
- Category: Church (selected), College (available)
- Type: Baptist (selected), Catholic (available)
- Status: [Empty text box]
- City: [Empty text box]
- State: AK (selected), AL (available)
- ZIP From: [Empty text box]
- ZIP To: [Empty text box]
- County: COOK (selected), Cook (available)
- Country: Canada (selected), England (available)
- User Def Group: [Empty text box]
- Last Contact Date From: [Empty text box]
- Last Contact Date To: [Empty text box]

Figure 4: Admissions BYOR window

3. Click the **Reports** tab, select the desired report format, and then click **Print**. The displayed result varies depending upon the report format chosen.

Contact Maintenance

Track all contacts for your institution as well as student specific contacts. To maintain an overall institutional list, use the Contact Maintenance window accessed through Admissions (**Admissions >Contacts >Add/Change**). If you want to add a contact to a student record, you need to access the Student Contacts entry form through Student Admissions (**Admissions >Student >Change/Add Student >More tab >Contacts**).



Step-by-Step: Add a Contact Through Contact Maintenance

1. From the **CAMS Enterprise Home** page, click **Admissions >Contacts >Add/Change**.
2. If maintaining an existing contact, using the select filters to locate that contact. If this is a new contact, click **Add** to open a new detail entry form.

Contact type:	<input type="text"/>	Institution:	<input type="text"/>
Salutation:	<input type="text"/>	Title:	<input type="text"/>
First name:	<input type="text"/>	Middle name:	<input type="text"/>
Last name:	<input type="text"/>	Suffix:	<input type="text"/>
Address:	<input type="text"/>	Line 2:	<input type="text"/>
Line 3:	<input type="text"/>	City:	<input type="text"/>
State:	<input type="text"/>	ZipCode:Prov:	<input type="text"/>
County:	<input type="text"/>	Country:	<input type="text"/>
Phone 1:	<input type="text"/>	Phone 2:	<input type="text"/>
E-Mail 1:	<input type="text"/>	E-Mail 2:	<input type="text"/>
E-Mail 3:	<input type="text"/>	Fax:	<input type="text"/>
Tax ID number:	<input type="text"/>		

In an effort to eliminate the duplication of entries, it is recommended that prior to adding a new record, check the list of existing contacts to make sure it has not already been entered.

Figure 5: Add Contact window

3. Select the appropriate contact type from the drop down list (Contact Type Glossary table).
4. Enter contact data.
5. Click **"X"** to save your record or **Cancel** to exit without saving.

Contact BYOR

Generating Contact Reports

If you have reviewed the General documentation which covers BYOR, you already have a good understanding of how this feature in CAMS operates. To begin, BYOR is a location in CAMS where you **Build Your Own Reports**. In the Contact BYOR, specific criteria is selected that will narrow the group of organizations for which you are reporting.



Step-By-Step: Generate BYOR Reports

1. From the **CAMS Enterprise Home** page, clicking **Admissions >Contacts >Reports >BYOR**. The Organization BYOR Criteria Selection window opens.
2. Select desired criteria. The more items selected, generally the narrower the grouping.

Contact Type:	Company Faculty	Contact Linked To:	Donor Faculty
Institution From:	<input type="text"/>	Institution To:	<input type="text"/>
Last Name From:	<input type="text"/>	Last Name From:	<input type="text"/>
City:	<input type="text"/>	State:	AK AL
ZIP From:	<input type="text"/>	ZIP To:	<input type="text"/>
Country:	Canada England		
Tax ID Number:	<input type="text"/>		

Figure 6: Contacts BYOR window

3. Click the **Reports** tab, select the desired report format, and then click **Print**. The displayed result varies depending upon the report format chosen.

High School Lookup

The High School Lookup Table stores information about pre-college education for prospects, applicants, and students, and is accessible through the Admissions module.



Step-by-Step: Add New Entry Or Maintain An Existing Entry

1. From the **CAMS Enterprise Home** page, click **Admissions >Lookups >Highschool**.
2. Use the search criteria to locate an existing entry for maintenance or to simply confirm that the listing does not already exist.
3. Right-click in the data grid to open a new high school entry form.

Name:	<input type="text"/>	
High School Code:	<input type="text" value="0"/>	
Address:	<input type="text"/>	
City:	<input type="text"/>	State: <input type="text" value=""/>
Zip Code:	<input type="text"/>	
County:	<input type="text"/>	Country: <input type="text"/>

Figure 7: Add High School window

4. Enter school information, including the school name and high school code.
5. Click **Add** to save this information, or **Cancel** to exit without saving.

College Names

The College Lookup window is one of the few reference tables accessible for maintenance through the Admissions module. This table stores college information.



Step-by-Step: Add A New College Entry Or Maintain An Existing Entry

1. From the **CAMS Enterprise Home** page, click **Admissions >Lookups >College Name**.
2. Use the search criteria to locate an existing entry for maintenance or to simply confirm that the listing does not already exist.
3. Right-click in the data grid to open a new college entry form.

Name:	<input type="text"/>	Active: Yes <input type="button" value="v"/>
College Code:	<input type="text" value="0"/>	
Address 1:	<input type="text"/>	
Address 2:	<input type="text"/>	
City:	<input type="text"/>	State: <input type="text" value="v"/>
ZipCode:	<input type="text"/>	
Phone:	<input type="text"/>	Financial Aid Phone: <input type="text"/>
Administration Phone:	<input type="text"/>	

Figure 8: College Lookup window

4. Enter school information, including the college name and code.
5. Select Yes or No to indicate whether the record is active.
6. Click **Add** to save this information, or **Cancel** to exit without saving.

Communications Management

Communications Management allows you to apply an event or sequence of events to prospects or students. Here, you can record phone calls, letters, meetings, interviews, etc. Record activities as they occur as well as activities that are planned for a future date. Use this data to generate activity reports and on-screen to-do lists. To simplify the instructions on the following pages, prospects and students will be referred to as individuals, and instructions will apply to both prospects and students unless otherwise stated. Prospect Activity records are accessed through Admissions >Prospect >Add or Change Prospect >Activity tab. Prospect Correspondence and Working-To-Do reports are accessed through Admissions >Prospect >Reports >Correspondence or Working-To-Do. Student Activity records are accessed through Admissions >Students >Add or Change Student >Activity tab. Student Correspondence and Working-To-Do reports are accessed through Admissions>Students >Report >Correspondence or Working-To-Do.

Activities can be added to an individual's record singly or as a group (sequence).

- **Activities** can be found on a "To-Do" list, used in email, or exported for use in your choice of media such as a word processing or spreadsheet package (MS Word, Excel, and more). Letters, phone calls, and interviews are examples of possible activities.
- **Groups** are sets of activities to be applied to individuals for a specific purpose. For example, an Admissions office may have a group called Incoming Freshmen that contains activities such as letters pertaining to a student's entrance to the institution.

Staff members within Admissions offices can create new sequence groups, apply activities, insert them in specific records, and generate the activity. The list of activities is defined in the Activity Lookup reference table. The CAMS Manager will add the list of activities to this table which will be used to define all communications management groups.



Step-by-Step: Add a Single Activity

1. In the Activity tab, right-click within the list box to display the activity entry form. Select an activity from the drop-down list (Activity Lookup reference table).

The screenshot shows a web-based form for adding an activity. It features several dropdown menus and radio buttons. The 'Term' dropdown is set to 'FA-03', 'Activity Date' to '8/13/2003', and 'Activity' to 'Confirm Interview'. The 'Completion date' dropdown is empty. The 'Activity Type' section has four radio buttons: 'To-Do' (which is selected), 'Export', 'Email', and 'History'. At the bottom of the form is a large, empty text area labeled 'Notes:'.

Figure 9: Add an Activity window

2. Enter description of the activity, or in the case of recording details of a meeting of phone conversation, enter those notes. If the activity is being added as it is occurring (i.e. phone call), enter the completion date. Otherwise leave the field blank at this time.
3. Select the Activity Type: To-Do, Export, Email, or History.
 - If **Export** is selected for activity type, then select the Document Name from the drop-down list (field only appears after clicking Export).
 - If **Email** is selected, then select the email template from the drop-down list (field only appears after clicking Email). See Correspondence Email Setup for more detail on this topic.
 - If **History** is selected, the activity is already complete and is being recorded for historical purposes only. History is available for student activities only. This option is not available for prospects at this time.
4. Click **Add** to save the entry or **Cancel** to exit the form without saving.

Letter Sequences

As part of the Communications Management functions within CAMS, groups of activities can be created so that multiple activities can be added to a student record simultaneously. The process of setting up letter sequences, or groups of activities, begins by creating groups (as many as needed) and then assigning all activities applicable to that group. Once groups of activities have been established, they can be added to Prospect or Student records.



Step-by-Step: Create a New Group

1. From the **CAMS Enterprise Home** page, click **Admissions >Lookups >Letter Sequences**. The Admission Letter Sequences window opens. Click the **Groups** tab.
2. Right-click in the Letter Sequence Groups data grid to add a new group, or double-click a group name to edit an existing group.

Figure 10: Activity Group window

3. Enter the Group Name. This is the value that will appear in the group selection drop down list when adding a group of activities to a record.
4. Enter Group Description that further identifies this group.
5. Select the Doc Organization Unit (DocOrgUnit Glossary table). If you are creating a group of activities for students, select the Student Doc Organizational Unit. If you are creating a group of activities for prospects, select the Prospect Doc Organizational Unit. Note that the

DocOrgUnit Glossary table values are supplied by Three Rivers Systems and should not be changed or removed.

6. Click **Add** to save the new entry (**Update** to save changes), or **Cancel** to exit without saving.



Step-by-Step: Create Letter Sequences

1. From the **CAMS Enterprise Home** page, click **Admissions >Lookups >Letter Sequences**. The Admission Letter Sequences window opens. (If desired, select Prospect or Student from the Filter drop-down list to display the particular type of groups in the data grid.)
2. Highlight a group to which you want to add a sequence of activities, and then click the Sequence detail tab.
3. If making changes such as adding an activity to an existing sequence, you may select Yes to apply changes to prospect or student records which have already been assigned this sequence, or leave the default set to No and CAMS will apply the changes only to new records assigned this sequence.
4. Right-click in the sequence data grid to access a blank detail entry form.

Figure 11: Add Activity window

5. Select appropriate activity from the Activity drop-down list (Activity Lookups reference table).
6. Days Between: Enter number of days from the start date that activity is due.
7. Select Activity Type: To-do, Export, or Email.
 - If **Export** is your selected option, you will need to enter the Document Name (Document Ref reference table) for which the exported data is to be used.
 - If **Email** is selected, a drop-down list will appear asking for the appropriate Email Template.
8. Click **Add** to save entry or **Cancel** to exit without saving.

Repeat these steps for each activity that is to be added to the sequence.



Step-by-Step: Verify Letter Sequence Group Activities

1. Highlight the group to verify and then click **Verify**. CAMS confirms that the selected export document names and email templates associated with activities in the group are under the correct Doc Organization Unit (students or prospects). CAMS then displays a message noting whether the group is set up correctly or not.

- If not, a prompt displays indicating missing requirements. You will want to review the export document names and email templates for the selected activities in the group to locate ones that have been incorrectly assigned, and remove or replace them.

Applying Activity Sequences

Track events and activities that have taken place or need to be scheduled for future action (phone calls, letters, interviews, etc.). These activities can be added individually or as a predetermined group as described in the section on Creating Activity Sequences. Once these groups of activities have been created, the next step in this process is to link those activities to prospects or students.



Step-By-Step: Load an Activity Sequence

- For **prospects**, click **Admissions > Prospects > Change Prospect > Activities** tab. (For **students**, click **Admissions > Students > Change Student > Activity** tab.)
- To add a group of activities (as opposed to a single activity), click the **Load Seq** button (labeled **Sequences** for **students**).
- Select a group of predefined activities from the drop-down list in the **Select a Group** field. The individual activities in the selected group display in the activity list in the lower portion of the form.



Note: For students, an additional drop-down list also requires them to **Load Term**.

Select a Group:		Starting Date:			
HS Students		12/3/2004			
	ActivityType	LetterName	EmailDescription	DaysBetween	ActivityID
1	Email		FAFSA Link	0	4
2	To-Do			3	8
3	To-Do			9	11
4	Export	PHSLTR1.DOC		0	12
5	Export	PHSLTR2.DOC		7	13
6	Export	PHSLTR3.DOC		21	14
7	Export	LET6.DOC		28	29
8	Email		FAFSA Link	2	9

Figure 12: Prospect Activity Sequence window

- Select the Starting Date. Keep in mind that the activity due dates will be calculated by adding the number of days in the “Days Between” field to the Starting Date. Thus in this example, the first Email will be due “0” days from the start date, which in this example is 12/3/2004. First To-Do activity is due 3 days from the Start Date, which is 12/6/2004.
- Click **Load** to add this sequence to the individual’s record or **Cancel** to exit without saving. Once a sequence is saved, all activities display in the Activities form.



Note: You are not limited to only one group, or sequence, of activities. Multiple activity sequences can be added to a prospect’s or student’s records as they are required. Likewise, you are not committed to keeping unwanted activities on the record. In some instances there may be a specific activity within a group that does not apply to a particular prospect or student, this activity can simply be removed from the individual’s record or you can assign a completion date and provide a status value of “not required”, or any other appropriate explanation in the Notes area. Keep in mind that a main purpose of using activity sequences is to ease your data entry efforts by adding multiple activities simultaneously.

Mass Add Student Activity

The Mass Add Student Activity function allows you to add a single activity or a sequence of activities to a **group** of students determined by selection criteria. This feature is only available for students at this time.



Step-by-Step: Mass Add Activities

From the **CAMS Enterprise home** page, click **Tools >Processes >Admissions Module >Add Student Activity**. The Add Student Activity window opens with the Criteria Page 1 displayed.

Select criteria to designate a group of students to whom the activity will be added, and then click the Criteria Page 2 tab.

Additional criteria may be selected to define the group of students. When you have selected all the desired criteria from Criteria Page 1 and Criteria Page 2, click **Initiate**. This process creates a list of all students who meet the selected criteria. The list displays on the Students tab.

Mass Add Single Activity

1. Complete steps 1 - 3 from Step-by-Step: Mass Add Student Activity, and then click the **Activity** tab. Next, click **Add Single Activity**.

Figure 13: Add Single Activity window

2. Enter or select from the calendar the **Activity Due Date**.
3. Enter the appropriate **Term**.
4. Select the activity from the **Activity** drop-down list (Activity reference table).

5. Use the **Notes** text box to place additional information about the activity (optional).
6. The **Completion Date** will typically be left blank, unless you are adding the activity as a historical record.
7. Select the **Activity Type**: To-Do, Export, Email, or History.
 - If **Export** is selected for activity type, then select the Document Name from the drop-down list (field only appears after clicking Export).
 - If **Email** is selected, then select the email template from the drop-down list (field only appears after clicking Email). See Correspondence Email Setup for more detail on this topic.
 - If **History** is selected, the activity is already complete and is being recorded for historical purposes only.
8. Click **Process** to add the activity to the selected students' records. The following confirmation message displays, "Activity successfully added to selected students." You may view and update the activity in the Student Admissions Information window, Activity tab.

Sequence of Activities

1. Complete steps 1 - 3 from Step-by-Step: Mass Add Student Activity, and then click the Activity tab. Next, click **Add Activity Sequence**.

Figure 14: Add Sequences window

2. Select the appropriate **Sequence** from the drop-down list.
3. Enter the appropriate **Term**.
4. Enter or select from the calendar the **Activity Start Date**.
5. Use the **Notes** text box to place additional information about the activity (optional). Information recorded here will be attached to each activity in the sequence.

6. The **Completion Date** will typically be left blank when adding a new activity sequence, but if you do enter a completion date, it will apply to each activity in the sequence.
7. Click **Process** to add the sequence of activities to the selected students' records. The following confirmation message displays, "Activity successfully added to selected students." You may view and update the activity in the Student Admissions Information window, Activity tab.

Updating Activities

As phone calls are made or activities performed, you will wish to enter a completion date and comments as applicable. The entry of these dates plays a key role in producing accurate to-do lists and various reports. This applies to both prospects and students.



Step-By-Step: Update an Activity

1. Access the Activity tab of the individual's record.
2. Double-click the activity you wish to change. The Activity detail form displays.

Figure 15: Update Activity window

3. Edit appropriate information—Notes as desired and Completion Date.
4. Click **Update** to save changes or **Cancel** to exit without saving.

Activity Reports

While CAMS provides standard reporting options with ready to print reports already built in, it also contains an interactive feature in its on-screen Working To-Do list. This particular function provides you with the opportunity to view your to-do list for a particular individual and 'check' it off your list as you complete the given task. This section will cover both correspondence reporting as well as the Working To-Do list.

Generating Correspondence Reports

The Student Correspondence reports are used in conjunction with Student Activities and typically complete the contact management process for an activity. When assigning activities to students, they are defined as one of three types:

- **To-Do** – Simply, any physical activity that will be reviewed online or in a to-do list.
- **Export** – This option will produce a tab delimited ASCII file in the user's defined merge/export directory. Works with Export activity type.
- **Email** –Correspondence Emails are made possible by the creation of Email Templates. Once in place, they are linked to the activity through the creation of Letter Sequences or when adding an activity directly to the prospect record. Works with Email activity type.



Step-By-Step: Print a To-Do List

1. Access the Correspondence Report window. (From the **CAMS Enterprise Home** page, click either: **Admissions > Prospects > Reports > Correspondence** or **Admissions > Students > Reports > Correspondence**.)
2. Select appropriate criteria to be used in the selection of individuals to be included in the report. The selection date should account for weekends and holidays as to not exclude any activities.



Note: that the Counselor (Recruiters reference table) field allows you to run to-do lists by counselor (counselor field must be complete in the individual's Maintenance window), thus counselors can run only their lists if given access.

3. Click the **Reports** tab.
4. Select the desired report format: To-Do by Activity or by Counselor/Student.
5. Click **Print**.



Note: To-Do Lists will be displayed on the screen using Crystal Reports viewer, from which you will be able to send the report to a printer. These reports will not display Export and Email activities unless you select **Show All Activities**.



Step-By-Step: Export Correspondence

1. Access the Correspondence Report window. (From the **CAMS Enterprise Home** page, click either: **Admissions > Prospects > Reports > Correspondence** or **Admissions > Students > Reports > Correspondence**.)
2. Select appropriate criteria to be used in the selection of individuals to be included in the report. The selection date should account for weekends and holidays as to not exclude any activities.



Note: that the Counselor (Recruiters reference table) field allows you to run to-do lists by counselor (counselor field must be complete in the individual's Maintenance window), thus counselors can run only their lists if given access.

3. Click the **Reports** tab.
4. Select Export/Merge Correspondence.
5. Click **Print**.
6. The merge export will display in a list form. It will give notice in the status bar to verify that the data has been outputted and then click Update to mark these items as completed.
7. Click **Update**. You will be prompted with the following options:
 - Click **Yes** to mark these activities as Completed.
 - Click **No** to remain on the list form with no action being taken (Recommended if you have not yet verified data output. This option allows you to keep the form open while you check the data files.
 - Click **Cancel** to return to the criteria page without marking the activities as completed.



Step-By-Step: Email Correspondence

1. Access the Correspondence Report window. (From the **CAMS Enterprise Home** page, click either: **Admissions > Prospects > Reports > Correspondence** or **Admissions > Students > Reports > Correspondence**.)
2. Select appropriate criteria to be used in the selection of individuals to be included in the report. The selection date should account for weekends and holidays as to not exclude any activities.



Note: that the Counselor (Recruiters reference table) field allows you to run to-do lists by counselor (counselor field must be complete in the individual's Maintenance window), thus counselors can run only their lists if given access.

3. Click the **Reports** tab.
4. Select Email Correspondence.
5. Click **Print**. After clicking Print, a confirmation list will display all email messages that have been sent. All of these items will be marked as completed in the Activities form.

Either close the window in the usual method to leave the Correspondence Report window, or return to the Criteria page or Reports page by clicking the appropriate tab.

Mass Add Prospect Activity

Use the Mass Add Prospect Activity function to add a single activity or a sequence of activities to a group of prospects determined by selection criteria. Prior to adding activities, they must first be set up in **CAMS Manager >Lookup Table Options >Table Maintenance >Activity LookUp** Reference table. Activity sequences can then be set up through **Admissions >Lookups >Letter Sequences**.



Step-By-Step: Mass Add Activities

1. From the **CAMS Enterprise Home** page, click **Tools >Processes >Admissions Module >Add Prospect Activity**. The **Add Prospect Activity** window opens with the **Criteria 1** page displayed.
2. Select criteria to designate a group of prospects to whom the activity will be added, and then click the **Criteria 2** tab.
3. Additional criteria may be selected to define the group of prospects. When you have selected all the desired criteria from **Criteria 1** page and **Criteria 2** page, click **Initiate**. This process gathers a list of all prospects who meet the selected criteria. The list displays on the **Prospects** tab.

Single Activity

1. Click the **Activity** tab, and then click **Add Single Activity**.
2. Enter or select from the calendar the **Activity Due Date**.
3. Select the activity from the **Activity** drop-down list (Activity reference table).
4. Use the **Notes** text box to place additional information about the activity (optional).
5. The **Completion Date** will typically be left blank, unless you are adding the activity as a historical record.
6. Select the **Activity Type**: To-Do, Export, Email, History.
7. If **Export** is selected for activity type, then enter the Document Name (field only appears after clicking **Export**).
If **Email** is selected, then select the email template from the drop-down list (field only appears after clicking **Email**). See Correspondence Email Setup for more detail on this topic.
8. Click **Process** to add the activity to the selected prospects' records. You may view and update the activity in **Admissions >Prospect >Change Prospect**.

Sequence of Activities

1. Complete steps 1 - 3 under Mass Add Activities, and then click the **Activity** tab.
2. Click **Add Activity Sequence**.
3. Select the appropriate **Sequence** from the drop-down list.
4. Enter the appropriate **Term**.
5. Enter or Select the **Activity Start Date**.

6. Use the **Notes** text box to place additional information about the activity (optional). Information recorded here will be attached to each activity in the sequence.
7. The **Completion Date** will typically be left blank when adding a new activity sequence, but if you do enter a completion date, it will apply to each activity in the sequence.
8. Click **Process** to add the sequence of activities to the selected prospects' records. You may view and update activities in **Admissions >Prospect >Change Prospect**.

Document Tracking

Another component of communications management is Document Tracking, which consists of affixing a single, or more typically, a set of documents to applicant and student records. Each module can generate any number of document groups that include a set of items required in order to meet your institution's standards. The groups of documents are defined in the CAMS Manager module in the Document List reference table. Once created, these groups of documents can then be assigned to the appropriate applicant/student records. See the Document Tracking document for detailed information about this topic.

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