CHAPMAN UNIVERSITY

DATATEL

Intro To Datatel Manual

Navigation, Demographics, And Common Screens
Notes:
Table of Contents

NAVIGATION........................................................................................................1
Logging in and out.............................................................................................1
Datatel UI Icons...............................................................................................3
Accessing Screens............................................................................................4
Navigate Through a Screen..............................................................................5
Field Functions..................................................................................................7
LookUp Tables....................................................................................................8
Hide/View Tree Menu.......................................................................................10
Using the Favorites Menu...............................................................................11

DEMOGRAPHICS ..............................................................................................15
Adding a Person – The NAE screen.................................................................15
Address Types and Statuses...........................................................................26
Address Summary Screen (ADSU).................................................................27
Adding an Address..........................................................................................29
Changing an Address......................................................................................34
Adding a Pending Address..............................................................................35
Adding a Temporary Address..........................................................................37
Correcting Demographic Information...............................................................39

COMMON DATATEL SCREENS........................................................................40
Name and Address Entry (NAE)......................................................................40
Address Summary (ADSU).............................................................................41
Person Addresses (ADR).................................................................................42
Applicant Summary (ASUM)..........................................................................43
Student Profile (SPRO)..................................................................................44
AR Account Inquiry by AR Code (ARIQ).........................................................45
Student Academic Credits (STAC)...............................................................46
Print Screens...................................................................................................47
NAVIGATION

PURPOSE: This section will acquaint you with ways to logon and logoff of the system, to access and navigate through a screen, to understand functions of common fields within a screen and to use LookUp tables.

Logging in and out

- To logon, double click on the Datatel icon.

- Type your password in lower case. When you are prompted to change your password, it must be at least 6 characters, 1 of which must be a number and 2 of which must be letters. Click on OK or press ENTER. (NOTE: Datatel will prompt you to change your password every 30 days and you cannot repeat passwords within 10 months.)
• The following message box appears when you select COLLIVE as the database:

![Alert]

********** WARNING **********
YOU ARE NOW ACCESSING THE LIVE ACCOUNT
THIS ACCOUNT IS NOT FOR PRACTICE OR TESTING!

ALL INFORMATION IS CONSIDERED CONFIDENTIAL AND PROTECTED BY FERPA

[OK]

• Press ENTER or click on [OK]. You should then see “Loading Application ST” come up. If this says it’s loading a different application, see the Script Update Message on the next page.

![Loading Application ST]

• Datatel will then open with two columns of folders.

SCRIPTS UPDATE MESSAGE: On occasion, when you log in you may get the following message:

![Alert]

Your scripts are out of date and must be refreshed.

[OK] [Cancel]

Click on OK. Your scripts will then be updated. When this process is complete, you will get another message: “You need to restart the Datatel application now.” Click on OK. Now double click on the Datatel icon to reload. Make sure it is loading ST. If not, after the menu bar appears, click on Apps and select ST.

• To logoff of the system, click on FILE / EXIT.
Datatel UI Icons

When you open a folder on the initial Datatel menu, you may see one or all of the following icons (the left side of the Datatel screen is displayed below):

- The pencil icon indicates maintenance (input) can be done in these screens. If your logon has maintenance access, some/all of the fields will be white. If your logon has viewing access only, the fields will be gray.

- The “i” icon means this screen is for viewing information only. These screens cannot be set up for maintenance (input).

- THE PAGE ICON INDICATES THIS SCREEN IS USED TO RUN REPORTS.

- The arrow icon means this screen runs a process. For example, automatically assigning pin #s to students.

There are also some icons within some of the screens that are explained here:

- When you click on an angled arrow at the end of a particular field, you will detail down to another menu/screen.

- When you click on the down arrow at the end of a particular field, you will see a list of valid codes for this field. Highlight and click on the code you want.

- When you click on the calculator icon at the end of a particular field, a mini calculator will open up. When you are through with your calculations, the end result will appear in the field.

- When you click on a calendar icon at the end of a particular field, a mini calendar will open up. When you double click on the desired date, it is entered into the field.
Accessing Screens

Screens can be accessed in one of four ways (refer to arrows in figure below):

1. Click on FILE / RUN and type in the screen name (a 3 or 4 letter mnemonic). Click on "Go" or press ENTER.

2. Type the mnemonic initials into the "Mnemonic" field and either click on Go or press ENTER.

3. Click on one of the screens listed under FILE (arrow #1). (The system will save the names of the last 10 screens you used.) This also works if you click on the drop down arrow that #3 is pointing to. This is the fastest way to access a screen.

4. Or you can open the folders until you come to the mnemonic you need and double click on it.

For purpose of this manual, only the first option will be used.
Navigate Through a Screen

Most screens first ask you to enter a student’s name.

![Figure 1 Resolution Screen]

In this prompt, you may enter *either* of the following:

- A Social Security Number without dashes
- A Chapman ID number
- "First Initial" [space] "LastName" in upper or lower case
- "LastName" [comma] "First Initial"

A resolution screen like the one below will appear.
• This screen is 4 pages long and you are on page 1 (see circled area) Press ENTER or PAGE DOWN to view more entries.

• To make a selection from this screen, do either of the following:
  - On the bottom of the screen in the white area, type the number that is next to the code of your choice and press ENTER….OR
  - (1) click on the box to the left of the code, then (2) click on the disk at the bottom of the screen (see numbered arrows above)

Navigate through a fields
  - To advance from field to field, press ENTER or TAB.
  - To go back to the previous field, press SHIFT TAB.
  - To go directly to any field, use the mouse.

Exit from a screen
  - Press F10 or click on FILE / SAVE to save data and stay in the same screen. Datatel will prompt for new Look Up.
  - Press F9 or click on FILE / CLOSE to save data and exit.
  - Press Shift + F8 or click on FILE / CANCEL to exit the screen without saving data. Datatel will prompt for a new Look Up.

Using the Toolbar Buttons

You can also press the following buttons on your toolbar.

SAVE (same as F10)
CANCEL (same as Shift + F8)
SAVE ALL (same as F9)
CANCEL ALL (cancels out of all open screens)

Be very careful when using the cancel function. The system will sometimes delete information from the previous screens you went through to access your current screen, not just the information from the screen you are in.
Field Functions

- The default colors of the fields are as follows:
  - **Red** is the color of the header.
  - **Gray** fields are for viewing. No information can be changed in a gray field.
  - **White** fields are for maintenance. These are the fields where information can be changed.
  - **Blue** fields can house more information that can be seen from the screen you are in. With the cursor in that field, you can click on FILE / DETAIL (or F2) and another screen will pop up which gives you more details about that field. This is called **detailing down**. (Click on FILE / CLOSE or F9 to return to the previous screen.) You can also click on the button next to the field to detail down on the field.

- Notice some fields are multi-valued; they have a 1 in front of them. This indicates that there can be more than 1 entry in that field and that you are ready to input the first entry. After you input your data on line 1 and press ENTER, a 2 will appear and the field will go blank. Type a second entry or press ENTER to advance to the next field. Usually the 2 will revert back to a 1 and the data you just entered will reappear.

- To view a hidden entry in these multi-valued fields, just click on the up/down arrows to the right of the field (see example below). If your cursor is in a multi-valued field, the lower right side of the screen will tell you which entry you are in and how many entries there are (e.g. 1/2).

- **To delete information** from a field, make sure your cursor is in the field you wish to delete and press F4 or click on FILE / FIELD DELETE.

- **To change information** from a field, make sure your cursor is in the field you wish to change and type over the current information.

  If you are unable to type over the information, delete the information first (F4), then type over it.
LookUp Tables

A LookUp Table is a list of valid choices for a particular field. LookUp Tables can be accessed in one of two ways. With your cursor in a field, look at the bottom of the screen.

- If it says LookUp, type “…” and the LookUp Table will appear.

![Figure 2 LookUp table accessed by typing “…”](image)

[Exception: If you are looking up a person or an organization, do not type “…” Instead, type the name of the person or the organization and press ENTER.]
If the bottom of the screen does not say LookUp, then go to the top of the screen and press **F1** and **C(odes)** or click on **HELP / FIELD HELP**. Choose **CODES** * and the LookUp Table will appear. You can also click on the down arrow to the right of the field for the codes.

![LookUp Table Screen](image)

**Figure 3** LookUp table accessed by clicking on HELP / FIELD, then clicking on CODE

Codes from these LookUp tables can also affect other fields. In the above example, by choosing “Mrs” for a Prefix, an “F” will automatically appear in the Gender Field.

* By choosing More under Field Help, you will see a brief explanation of how that particular field works and what kind of information you need to input.
Hide/View Tree Menu

When your Tree Menu is hidden, the folders on the left side of the window disappear so that you can view the entire screen. A screen with the Tree Menu showing is displayed below:

![Figure 4](image)

To hide the Tree Menu, access a screen (i.e., NAE) and select the tree icon from the top tool bar. The folders on the left side of the screen should disappear. To see the Tree Menu (when the folders are hidden), select the tree icon and the folders should appear on the left side of the screen.
Using the Favorites Menu

If you access several of the same screens in Datatel, you can put them under the Favorites Menu for quick access. To enter a screen into your Favorites Menu, select FAVORITES / ADD TO FAVORITES… from the top menu bar.

In this window, you can either enter a mnemonic into the field and click OK, or select CREATE IN… to enter a mnemonic in another folder.
If you select CREATE IN…, another window appears as shown below:

Select the desired folder by highlighting the folder name, then click OK.

If you want to put the mnemonic in a new folder:

- Enter the mnemonic in the empty field.
- Select the existing folder where the new folder will go by highlighting the existing folder’s name.
- Click NEW FOLDER.
- In the Create Folder window, enter the new folder name and click OK.

- Click OK again.
When you access the Favorites Menu, you should see the screen names that you have entered. By selecting FAVORITES / then the screen name, Datatel will take you to the selected screen. Each time you log onto Datatel, you can access these screens through your Favorites Menu.

An example appears below:

![Figure 6](image)

You can also organize your Favorites by selecting FAVORITES / ORGANIZE FAVORITES...

In the following example, an Admissions folder contains the CRAF screen and the general Favorites folder contains the ASUM, TRAN and APFE screens.
To Move Items Into Folders

To move a mnemonic or a folder into another folder select the mnemonic or folder so that it is highlighted, then click MOVE TO FOLDER.

Make sure that you can see all of the folders you created by clicking on the small plus sign next to each folder (+). See the following examples:

Now, select the folder that you want to move the mnemonic or folder into and click OK.

To Rename A Folder

• Select FAVORITES / ORGANIZE FAVORITES…
• Highlight the folder you want to rename
• The name will highlight and a cursor will appear at the end of the folder name. You may now type over the old name, then click anywhere in the white area of the Organize Favorites window.

To Delete A Folder

• Select FAVORITES / ORGANIZE FAVORITES…
• Highlight the mnemonic or folder that you want to delete.
• Click on DELETE.
DEMOCRAPHICS

Adding a Person – The NAE screen

**PURPOSE:** The Name and Address Entry (NAE) screen is used to add a person to the system. Prior to entering any data, it is crucial that you make every attempt to determine whether the person you are adding is already in the system. We are going to be very diligent in keeping our database free of duplicates and we need your help!

- Click FILE / RUN and type **NAE**. Click OK or press ENTER.
- A PERSON LOOKUP screen will appear. There are several ways you can look up a person to see if they are on the system.

1) **BY SOCIAL SECURITY or ID:** type the social security number (no dashes required) or the Datatel or SRN (Reflections) ID. Because a social security number may have been entered in the system incorrectly, be sure to search thoroughly by the other methods.

2) **BY PARTIAL NAME:** simply type the FirstInitial and LastName. Always search using the **least complete** name so that all possible choices will show on the list. (If you can’t find your person using the first initial, try searching with just the last name.) In the following example, the particular Patricia Smith we’re looking for lives at 510 E Redlands and is in the system as Pat Smith.

<table>
<thead>
<tr>
<th>Search by</th>
<th>You will get:</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>P Smith</td>
<td>Pat Ann Smith</td>
<td>416 N Highland Ave</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Van Nuys, CA 91604</td>
</tr>
<tr>
<td></td>
<td>Pat Mary Smith</td>
<td>510 E Redlands</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Orange, CA 92866</td>
</tr>
<tr>
<td></td>
<td>Patrick Smith</td>
<td>1313 W East St</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Anaheim, CA 92806</td>
</tr>
<tr>
<td></td>
<td>Petula Smith</td>
<td>5151 S Lakewood Dr</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lockport, IL 60441</td>
</tr>
<tr>
<td>Patricia Smith</td>
<td>Patricia Smith</td>
<td>416 N Highland Ave</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Van Nuys, CA 91604</td>
</tr>
</tbody>
</table>

If you search by **P Smith** you will find her on the list. However, if you search by **Patricia Smith** you won’t pull her up. If you mistakenly conclude that she is not in the system and add her, **you will have just created a duplicate entry. BE VERY CAREFUL AND ONLY USE PARTIAL NAMES IN LOOKUPS.**
3) **VIEW MULTIPLE ADDRESSES**: It is important to be aware that there may be more than 1 address in the system. When you use the LookUp table and get a resolution screen, only 1 address will show (the person’s current mailing address). Here is a way to view the other addresses.

In the example we just used, let’s say that the only address you have is Pat’s parent’s address: 444 N Maple Ave, Van Nuys, CA 91604. If you searched by P Smith, you would not see the 444 N Maple address and might mistakenly conclude that your Pat Smith is NOT in the system. However, knowing that there may be more than 1 address for anyone on the list, you decide to view all the addresses. Exit out of the NAE screen then click FILE / RUN and type ADSU. To narrow the search, look up only P Smiths with a zip code of 91604. To do this type **P Smith; z 91604**. Your list will include:

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pat Ann Smith</td>
<td>416 N Highland Ave</td>
</tr>
<tr>
<td></td>
<td>Van Nuys, CA 91604</td>
</tr>
<tr>
<td>Pat Mary Smith</td>
<td>510 E Redlands</td>
</tr>
<tr>
<td></td>
<td>Orange, CA 92866</td>
</tr>
</tbody>
</table>

Any on the list could be your Pat Smith. With your mouse, highlight each box to the left of the Pat Smiths listed. Then choose the left button at the bottom of the resolution screen. You will see the first Pat Smith come up in the ADSU screen. Page Down to view all the addresses. If none of these addresses match the one you are looking for, press F10 (Save) and you will get a message similar to the following:

```
Alert
A list of records is active. Discard entire list, go to previous record, go to next record or jump to a record?
```

If you choose **Next**, the second Pat Smith on the list comes up in ADSU. Again, Page Down to view all the addresses. If none of these addresses match the one you are looking for, press F10, then click on **Next** to view the next Pat Smith. Continue this process until one of the addresses listed for a Pat Smith is the 444 N Maple Ave. If you find the address, then your search is over. Press **Discard** to cancel the process. You have located your Pat Smith and have not created a duplicate entry because you viewed all of the addresses in the ADSU screen for a group of P Smith from a particular zip code.
OTHER DELIMITERS: You can also search by other delimiters. Simply type the person’s FirstInitial and LastName followed by a semi colon. Then add any one of the following delimiters:

<table>
<thead>
<tr>
<th>DELIMITER</th>
<th>ENTRY</th>
<th>DELIMITER</th>
<th>ENTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zip</td>
<td>;Z 92886</td>
<td>Foreign Country</td>
<td>;F CUBA</td>
</tr>
<tr>
<td>City</td>
<td>;C ORANGE</td>
<td>Reunion Year</td>
<td>;Y 88</td>
</tr>
<tr>
<td>State</td>
<td>;ST CA</td>
<td>Source</td>
<td>;S FR</td>
</tr>
</tbody>
</table>

SOUNDEX: use SOUNDEX if you are unsure of the spelling of a person’s name, especially vowels. Is the name spelled Steifel or Stiefel? Is the name spelled Hamburg or Hamberg? This feature will bring up names that sound like the name you are looking for. Simply type a slash before typing the name of the person you are searching for. For example, by typing /LSLL, all LaSalles, LeSails, etc. on the system would appear on the list. As another example, by typing /P SMITH all of the P Smiths, P Smyths and P Smythes will appear on the list. It is a good idea to double check for duplicates using SOUNDEX in case the person’s name was spelled incorrectly when they were first entered on the system.

If you have not found the person you are looking for and their address, press F9 to Exit the ADSU screen. Now do FILE / RUN and go back into the NAE screen and add them to the system as described in the following paragraphs.

TO PREVENT DUPLICATIONS, use all 3 look up approaches before adding a person to the system. If you do find a duplicate, please send the IDs in question, the name of the student and their correct SSN to duplicat@chapman.edu. You will receive a message back stating which ID is the correct one to start using. The sooner the duplicate is dealt with (before classes, financial aid, etc are added), the easier it will be to correct.

- After a list appears, double check the addresses and social security numbers of those on the list and verify that the person you want to add is not already on the system. If the person you are searching for does not appear on any list, using all 3 look up approaches, type A for Add in the white field at the bottom of the screen and press ENTER. (If no list appears, you will get a Box, which states: “record not found- reenter or add.” Click on Add.)
A message box like the one below will appear. (There is another database called Benefactor, where fundraising, etc. is done. You are in the Colleague database. Because these two databases do not interact, you must also search in the Benefactor database to prevent creating a duplicate ID.)

Always press ENTER or click on Y.

You will then be asked:

Type P or click on P.

The following message box will appear:

Move the message box out of the way by clicking anywhere in the blue section on the top of the box and drag it towards the bottom of the screen. Then you can view the list in Benefactor to see if the person you are adding to the system already exists in the Benefactor database. You can press ENTER to scroll down the list. If you found the person in the Benefactor database, in the blue box simply type the sequence number that is to the left of their name and press ENTER. This will bring information from the Benefactor database into your NAE screen. Complete any fields that are blank.

If you cannot find the person you are searching for in the Benefactor database, type A(dd) in the blue box and press ENTER.

A blank NAE screen will appear. Once completed, it will look like the one on the next page.
• Notice the ID assigned to your person at the top right of the screen (see arrow above).

• Complete each NAE field as shown on the next few pages.

• Please note that these fields MUST be filled in for ANYONE that is entered into Datatel (whether it is a student or employee).
Remember to access your LookUp tables, if needed. Codes can be entered in upper or lower case.

Asterisk * indicated critical information:

<table>
<thead>
<tr>
<th>NAE Field</th>
<th>Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td>Type Mr, Mrs, Ms, etc. (periods not required).</td>
</tr>
<tr>
<td>* Name LFM</td>
<td>The last name and first initial will automatically fill in from your inquiry window. Type over the first initial and add the first name. Press ENTER and add the full middle name if available. You can also type over any part of the name that was misspelled. Because the system converts every letter of a name to lower case except the first letter, some names need to be entered using a special tool. For example, if the person’s last name is spelled DeLaRosa, the system will automatically convert it to Delarosa. To retain the correct capitalization, simply type = before the person’s name. For example, type =DeLaRosa</td>
</tr>
<tr>
<td>Suffix</td>
<td>Type Jr, III, etc.</td>
</tr>
</tbody>
</table>
**NAE Field** | **Choices**
---|---
*Address* | Type in the street address and press ENTER. The field will go blank and a 2 will appear before the address field. Type in the second line of the address if needed or simply press ENTER to advance to the next field.

The address should be kept up to date at all times. To change an address, go to ADSU on page 20.

Chapman University limits the address field to TWO lines. The first line should be used for the street address; the second line could be used for an apartment or suite numbers, for example Apt 101 (no period after Apt) or Ste B (no period after Ste or B).

North, South, East and West are abbreviated with their initial, i.e. N, S, E and W.

Please abbreviate ONLY THE LAST WORD of the street address using the following Postal Service Standard Abbreviations:

- Ave, Avenue
- Bch, Beach
- Blvd, Boulevard
- Cyn, Canyon
- Ctr, Center
- Cir, Circle
- Ct, Court
- Dr, Drive
- Expy, Expressway
- Hbr, Harbor
- Hts, Heights
- Hwy, Highway
- Hi, Hill
- Jtc, Junction
- Ln, Lane
- Msn, Mission
- Mt, Mount
- Pkwy, Parkway
- Pl, Place
- Rd, Road
- Rte, Route
- St, Street
- Ter, Terrace
- Trl, Trail
- Vly, Valley
- Vlg, Village

Post Office is abbreviated PO (no periods). Enter street numbers without apostrophes or quotes, e.g. 1 Kenwood Place.

<table>
<thead>
<tr>
<th>Type your address as:</th>
<th>NOT</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Box 5123</td>
<td>P.O. Box 5123</td>
</tr>
<tr>
<td>410 N Hwy B</td>
<td>410 North Highway “B”</td>
</tr>
<tr>
<td>163 S Kenwood Ave</td>
<td>163 South Kenwood Avenue</td>
</tr>
<tr>
<td>Ste R-1</td>
<td>Suite “R-1”</td>
</tr>
<tr>
<td>NAE Field</td>
<td>Choices</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| * Cty / St / Zp   | The zip code can by typed in the Cty field. The system should automatically fill in the city and state, and move the zip code to the Zp field.  
If the city comes up incorrectly, you can edit the field.  
If the city and state fields are left blank, type in the  
correct city and state and press ENTER. The next time  
you use this zip code, the city and state created with that  
zip code will automatically appear.  
Doing a "..." on the state field will show you a list of  
states and provinces. |
| Cnty              | The system should automatically fill in the county. If not, use the LookUp table for the appropriate abbreviations.                     |
| Res Cnty / State  | Leave blank.                                                                                                                           |
| Country           | Leave blank unless the person is from a foreign country. Then select the appropriate abbreviation from the  
LookUp Table by doing a "...".                                                         |
<table>
<thead>
<tr>
<th>NAE Field</th>
<th>Choices</th>
</tr>
</thead>
</table>
| **Phone / Ext / Type** | Type in the phone number (no dashes needed). Press ENTER. Type an extension, if applicable. Press ENTER. Add a phone type from the following hierarchy list:  
| P               | Primary                                                                  |
| I               | Billing (send info to the Business Office to process)                        |
| R               | Parent                                                                   |
| O               | Other                                                                    |
| B               | Business                                                                 |
| C               | Cell                                                                     |
| F               | Fax                                                                      |
| G               | Pager                                                                    |
| L               | Last Known                                                               |
| M               | Message Service                                                          |
| V               | Voice Mail                                                               |

You can have only 1 Primary phone type. If more than 1 category applies, use the phone type that is higher on this list. For example, if the student is living with his parents, use Primary instead of Parent because Primary is higher on the list.

Enter additional phone numbers and codes, if needed.

<table>
<thead>
<tr>
<th>Origin / Date</th>
<th>Used only by Admissions (see Admissions section of manual).</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>* Soc. Sec</th>
<th>Type in the social security number (no dashes needed).</th>
</tr>
</thead>
</table>

<p>| * Birth Date  | Type in the birth date using month, day and the full year (e.g. 10131947). Dashes are not needed. |</p>
<table>
<thead>
<tr>
<th>NAE Field</th>
<th>Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Ethnic</td>
<td>Choose from the following ethnic codes:</td>
</tr>
<tr>
<td></td>
<td>\begin{itemize}</td>
</tr>
<tr>
<td></td>
<td>\item 10 International (non-resident)</td>
</tr>
<tr>
<td></td>
<td>\item 20 African American</td>
</tr>
<tr>
<td></td>
<td>\item 30 Native American/Alaskan</td>
</tr>
<tr>
<td></td>
<td>\item 40 Asian/Pacific Islander</td>
</tr>
<tr>
<td></td>
<td>\item 50 Other Hispanic</td>
</tr>
<tr>
<td></td>
<td>\item 51 Mexican American (law school only)</td>
</tr>
<tr>
<td></td>
<td>\item 52 Puerto Rican (law school only)</td>
</tr>
<tr>
<td></td>
<td>\item 60 Caucasian</td>
</tr>
<tr>
<td></td>
<td>\item 70 Race/Ethnicity Unknown</td>
</tr>
<tr>
<td></td>
<td>\item 71 Multi-cultural</td>
</tr>
<tr>
<td>Gender</td>
<td>The gender will default from the Prefix field for gender-specific prefixes. Otherwise you will need to type \textbf{M} or \textbf{F}.</td>
</tr>
<tr>
<td>Mail Codes</td>
<td>Mail rules are used to denote whether the individual wants to have phone contact or not. Use the following Mail Codes if requested:</td>
</tr>
<tr>
<td></td>
<td>\begin{itemize}</td>
</tr>
<tr>
<td></td>
<td>\item DC \textbf{Don’t Call}</td>
</tr>
<tr>
<td></td>
<td>\item NW \textbf{No Work Calls}</td>
</tr>
<tr>
<td>E-Mail Adr</td>
<td>Type \textbf{U(nknown)}, \textbf{C(hapman)}, \textbf{B(usiness)} or \textbf{P(ersonal)}. Press ENTER. Then type in the complete e-mail address.</td>
</tr>
<tr>
<td>Pref Name</td>
<td>Accept the default.</td>
</tr>
<tr>
<td>Mail Name</td>
<td>Accept the default.</td>
</tr>
<tr>
<td>NAE Field</td>
<td>Choices</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Other LFM</td>
<td>This field is for former names or maiden names. Complete Last, First and Middle name fields.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Current</strong> name will show up in the LookUp table when you are searching for the <strong>Other</strong> name. For example, if Patricia Smith’s maiden name were Patricia Thompson, and you entered her maiden name in this field, Patricia Smith’s name would appear as an entry on the LookUp table when you look up Patricia Thompson.</td>
</tr>
<tr>
<td></td>
<td>If a student might identify themselves by their Nickname, you may want to enter the Nickname in this field (Last/Nickname) to add it to the LookUp Tables.</td>
</tr>
<tr>
<td>Source</td>
<td>Leave blank.</td>
</tr>
<tr>
<td>Address Change Source</td>
<td>Leave blank. Only used for address changes.</td>
</tr>
</tbody>
</table>

- Press **F9** or click on FILE / CLOSE to save this information and exit (or press **F10** or click on FILE / SAVE to save and stay in this screen).
Address Types and Statuses

Addresses are stored in the Colleague system with a specific address type and a specific status. They are classified either as a Preferred Mailing Address or not a Preferred Mailing Address.

- There are six address types:
  - **AD** is for permanent ADdress. This is the default code of the first address that is entered in the system in the Name and Address (NAE) screen and will be the code for every permanent address.
  - **TP** is for Temporar y address. This can be a summer address or it can be the address for a fall/spring term. Every Temporar y address must have an end date.
  - **CH** is for Chapman-arranged Housing, including dorm and off-campus housing arranged by the Residence Life staff.
  - **AR** is for Billing address. ALWAYS SEND BILLING ADDRESS REQUESTS TO THE BUSINESS OFFICE FOR PROCESSING, if different from the AD ADdress.
  - **DP** is for Diploma address, if different from the AD ADdress. This is the address to which the diploma will be mailed.
  - **BS** is for BuSiness address.

- The status can be
  - **C** for Current
  - **F** for Former
  - **P** for Pending

- The preferred mailing address (there can only be 1 preferred mailing address) is specified as
  - **Yes**, if it is the Preferred Mailing Address (only used for Permanent ADdress and BuSiness address types)
  - **No**, for all other address types
Address Summary Screen (ADSU)

PURPOSE: When changing or adding an address to the system, it is very important to first find out which addresses are in the system and what are their address types and status codes. To do this, you need to bring up the Address Summary (ADSU) screen.

- Click FILE / RUN and type ADSU. Click OK or press ENTER.
- A PERSON LOOKUP screen will appear. Type the names of the person whose address you wish to view and select it from the LookUp table (see Navigation section.)
- The following Address Summary (ADSU) screen will appear:

![Address Summary Screen](image)

Figure 8 Address Summary screen

- This screen shows that there are 3 current addresses (see arrow). The address type is shown in the right column (see rectangle). In this example, the first address has a Billing address type, the second has a Diploma address type and the third has an Address type. You cannot tell by looking at this screen which address is the preferred mailing address. To find out that information, detail down by placing your cursor to the left of the address you are interested in viewing and press F2 or click on FILE / DETAIL.
The first value in the circled area in Figure 5 on the previous page shows which address your cursor is on (Address 2). The second value shows the total number of addresses in this student’s record (4).

If you press ENTER, a continuation of the Address Summary screen will appear as shown below:

![Figure 9 Second page of the Address Summary screen](image)

This screen shows 1 former address, which has a billing address type.

The following sections will describe:

- how to ADD an address to the system
- how to CHANGE address information in an existing address field
- how to add a PENDING address
- how to add a TEMPORARY address
- how to change OTHER INFORMATION
Adding an Address

**PURPOSE:** This section will show you how to add an address to the system. A new address should only be added if you can’t find that address on the Address Summary (ADSU) screen. If you want to add or change an address type or other address information, refer to the next section (Change Address Information).

- Click FILE / RUN and type **ADSU**. Click OK or press ENTER.
- A PERSON LOOKUP screen will appear. Type the names of the person whose address you wish to view and select it from the LookUp table (see Navigation section.)
- The Address Summary (ADSU) screen will appear (see Figure 5).
- With your cursor to the left of a blank address, press **F2** or click on FILE / DETAIL.
- You will be asked to select Person Addresses (ADR) or Employment Information. Press ENTER to accept the Person Addresses default or click on **OK**.
- An Address Resolution screen will appear. Type **A** to add a new address.
- The Person Addresses (ADR) screen like Figure 7 on the following page will appear.

Notice that all phone numbers, e-mails and Mail Codes (same as “Person Mail” in this screen) which were entered in the Name and Address (NAE) screen will appear in the blank Person Address (ADR) screen. That is because phone numbers, e-mail and Mail Codes belong to the person and will appear in every address screen. This information can also be changed from any address.
Complete each ADR field as shown below.

Remember to access your LookUp tables, if needed. Codes can be entered in upper or lower case.

<table>
<thead>
<tr>
<th>ADR Field</th>
<th>Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>Same as the Name and Address (NAE) screen.</td>
</tr>
<tr>
<td>Cty / St / Zp / Cnty Res Cnty / State Country County</td>
<td></td>
</tr>
</tbody>
</table>
### ADR Field | Choices

**Type**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AD</td>
<td>Permanent Address</td>
</tr>
<tr>
<td>TP</td>
<td>Temporary Address</td>
</tr>
<tr>
<td>DP</td>
<td>Diploma Address</td>
</tr>
<tr>
<td>BS</td>
<td>Business Address</td>
</tr>
<tr>
<td>CH</td>
<td>Chapman-arranged Housing (used only by Residence Life)</td>
</tr>
<tr>
<td>AR</td>
<td>Billing address (SEND TO THE BUSINESS OFFICE FOR PROCESSING)</td>
</tr>
<tr>
<td>CO</td>
<td>Correction (only use this address type if you want to delete the entire address)</td>
</tr>
</tbody>
</table>

Usually there is only 1 address type in this field. However, if someone wants to have his or her diploma sent to an existing address, for example, simply go to a blank line in this field and add the DP code.

**Mail Pref**

Only a permanent Address or a Business address should be flagged as the preferred mailing address with a Yes.

For all other address types, accept the No default.

There can be only 1 preferred mailing address. By choosing Yes for this address, the last preferred mailing address will automatically change to No.

**Pref Res**

Make this field match the Mail Pref field above. (Type Yes or No.)

**Phone/Ext/Type**

Populates from the Name and Address (NAE) screen. New phone numbers can also be entered here.
<table>
<thead>
<tr>
<th>ADR Field</th>
<th>Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Person Mail</strong></td>
<td>Populates from the Name and Address (NAE) screen. &quot;Mail Codes&quot; in NAE. New phone restrictions to the person can be entered here (Don't Call or No Work calls).</td>
</tr>
</tbody>
</table>
| **Address Mail** | Restrictions to this address can be entered using one of the following codes:  
NC  No Mail per Chapman (preferred address only)  
NI  No Mail per Individual (preferred address only)  
UN  Undeliverable |
<p>| <strong>Seasonal Dates</strong> | Leave blank. |
| <strong>Modifier</strong> | Leave blank. |
| <strong>E-Mail Address</strong> | Populates from the Name and Address (NAE) screen. New e-mail addresses can also be entered here. However, DO NOT CHANGE the email address. We will keep and use only the Chapman University e-mail address given to the student (<a href="mailto:...@chapman.edu">...@chapman.edu</a>). If the student does not wish to use their CU e-mail address direct them to the Chapman website where they can forward their CU e-mail to a personal address. |
| <strong>Start Date</strong> | This will automatically default to the current date. |
| <strong>End Date</strong> | The End Date (i.e. 090301) field is only used for Temporary Addresses (see Temporary Address section). |
| <strong>Status</strong> | This will automatically default to Current. Only use a Pending status for a Pending Address. |</p>
<table>
<thead>
<tr>
<th>ADR Field</th>
<th>Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route Code</td>
<td>Leave blank.</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Accept default.</td>
</tr>
<tr>
<td>Chapter(s)</td>
<td>Accept defaults.</td>
</tr>
<tr>
<td>Source</td>
<td>Use this field only when you change an address (see Change of Address section).</td>
</tr>
</tbody>
</table>

- Press **F9** or click on FILE / CLOSE to save this information and exit (or press **F10** or click on FILE / SAVE to save and stay in this screen).
### Changing an Address

**PURPOSE:** To update or change address information, go to the Address Summary (ADSU) screen. Choose the address you wish to change, detail down to the Person Addresses (ADR) screen and make your changes.

- **Click** FILE / RUN and type ** ADSU.** Click OK or press ENTER.
- A PERSON LOOKUP screen will appear. Type the name of the person whose address you wish to view and select it from the LookUp table (see Navigation section.)
- The Address Summary (ADSU) screen will appear (see Figure 2.2).
- Place your cursor in the blue field to the left of the address you wish to change, press **F2** or click on FILE / DETAIL.
- You will be asked to select Person Addresses (ADR) or Employment Information. Press ENTER to accept the Person Addresses default or click on **OK.** You will now be in the Person Addresses (ADR) screen.
- Enter any address change by **typing over** the information in the field(s) you are changing. Your old address information will be saved in history as a former address if you answer “yes” to “saving-the-address-in-history” question when you exit this screen.
- If the old phone number will no longer be used, type the new phone number and phone type over the old information. (However, old phone numbers are **NOT** saved in history. Only type over an old phone number if it is obsolete. Otherwise, add a phone number and phone type by going to a blank line. Make sure there is only 1 **P**rimary phone type; change the code on the existing phone number if necessary.)
- In the **CHANGE SOURCE** field enter one of the following codes:
  - **F** for **Change Form** (i.e. Change of Address Form)
  - **R** for **Return Mail** (i.e. returned by post office with no forwarding addr.)
  - **E** for **Email/Fax** (i.e. faxed authorization)
  - **D** for **Data Correction** (i.e. data entry error, not saving old address in history)
- Press **F9** or click on FILE / CLOSE to save this information and exit (or press **F10** or click on FILE / SAVE to save and stay in this screen).
- If you change an address, you will be asked: “Do you want to keep address history?”
  - Only type or click on **No** if the first information was entered in error. Type or click on **Yes** in every other situation.
Adding a Pending Address

**PURPOSE:** If you are given notice of a future address and a start date, you can add it to the system as a Pending Address. Go to the Address Summary (ADSU) screen. Choose the address, which will be replaced by the pending address. Detail down to the Person Addresses (ADR) screen and type in the new address.

- Click FILE / RUN and type ADSU. Click OK or press ENTER.

- A PERSON LOOKUP screen will appear. Type the name of the person whose address you wish to view and select it from the LookUp table (see Navigation section.)

- The Address Summary (ADSU) screen will appear (see Figure 2.2).

- Place your cursor in the blue field to the left of the address which will be replaced by the Pending Address, press F2 or click on FILE / DETAIL.

- You will be asked to select Person Addresses (ADR) or Employment Information. Press ENTER to accept the Person Addresses default or click on OK. You will now be in the Person Addresses (ADR) screen.

- Enter the pending address by typing over the current address, city, state and zip code. Your old address information will be saved in history if you answer “yes” to “saving-the-address-in-history” question when you exit this screen.

- If the old phone number will no longer be used and you know the new phone number, type over the existing phone number and phone type. (However, old phone numbers are NOT saved in history. Only type over an old phone number if it is obsolete. Otherwise, add a phone number and phone type by going to a blank line. Make sure there is only 1 Primary phone type; change the code on the existing phone number if necessary.)

- In the Preferred Mail and Preferred Residence fields, always type N. When this address becomes active, it will automatically assume the preferred statuses from the address it replaces. It will also assume the Address Type of the address it replaces.

- Enter a day before the Start Date for the pending address. (The system needs a day to adjust.) The system will automatically change the status of the address it replaces to Former on this date.

- Enter P for Pending in the Status field.
In the CHANGE SOURCE field enter one of the following codes:

- **F** for Change **Form** (i.e. Change of Address Form)
- **E** for Email/Fax (i.e. faxed authorization)

- Press **F9** or click on FILE / CLOSE to save this information and exit (or press **F10** or click on FILE / SAVE to save and stay in this screen).

- You will be asked: “Do you want to keep address history?” Type or click on **Yes**.
Adding a Temporary Address

**PURPOSE:** This section will show you how to add a Temporary mailing address to the system. A Temporary Address is different from a Pending Address in that a Temporary Address has a Start Date and an End Date. The Temporary Address will not replace another address. It will stand on its own during the specified time period and then it will become a former address when the time period expires.

Temporary addresses are not limited to short time periods like summer vacations. They can be used for any period of time, as long as the address has an end date.

For example, a student may live off campus in his own apartment for the fall and spring terms, then he returns to his parent’s address during the summer. His off-campus address could be entered as a Temporary address with the end date of the last day of the spring term. After that time, all mail will be sent to his parent’s address, which is his permanent address in the system. If he returns to the same address next fall, the student would have to complete a Change of Address Form. The old address can be revived by changing the status code to Current. The start and end dates should then be changed to next year’s dates. This address can be used over and over again during the student’s four years at Chapman.

If the student prefers to rely on the post office to forward mail through the summer, then the apartment address would be coded as a permanent address.

- Click FILE / RUN and type ADSU. Click OK or press ENTER.
- A PERSON LOOKUP screen will appear. Type the names of the person whose address you wish to view and select it from the LookUp table (see Navigation section.)
- The Address Summary (ADSU) screen will appear (see Figure 2.2).
- With your cursor to the left of a blank address, press F2 or click on FILE / DETAIL.
- You will be asked to select Person Addresses (ADR) or Employment Information. Press ENTER to accept the Person Addresses default or click on OK.
- An Address Resolution screen will appear. Type A to add a new address.
- The Person Addresses (ADR) screen (see Figure 2.4) will appear.
- Enter the temporary address, city, state and zip code.
For address type, enter **TP** for Temporary.

Leave the preferred mail and preferred residence flags set to **No**. (When the Temporary Address kicks in, the Temporary address type will be more important than the preferred address status and mail will be sent to the Temporary Address until the time expires.)

If the student gives you a new phone number, ENTER until you are at a blank line in the phone field. Then type the phone number and phone type. If you are adding a Primary phone number, be sure to change the code of the other primary phone number to Parent or Other, since there should be only 1 primary phone number.

Enter a day before the Start Date of the Temporary address. (The system needs a day to adjust.)

Enter a day before the End Date of the Temporary address. (The system needs a day to adjust.)

Type **P** in the status field.

Press **F9** or click on FILE /CLOSE to save this information and exit (or press **F10** or click on FILE /SAVE to save and stay in this screen).

- **IF YOU ARE CHANGING AN ADDRESS, DETAIL DOWN ON AN EXISTING ADDRESS AND TYPE OVER THE EXISTING INFORMATION.**

- **IF YOU ARE ADDING AN ADDRESS, DETAIL DOWN ON A BLANK BOX IN ADDRESS SUMMARY, ENTER AND TYPE ADD TO CREATE A NEW ADDRESS SCREEN.**
Correcting Demographic Information

**PURPOSE:** Phone numbers, E-mail information, etc. can be added or changed in the Person Addresses (ADR) screen or the Name and Address (NAE) screen.

- Click FILE / RUN and type ADR (or NAE).
- Click on the field to be changed. (If the social security number needs to be changed, you must obtain a copy of the social security card to remain in the student’s file.)
- If you are replacing information, type the correct information over the existing information. If you are adding new information, go to the next blank line in the phone field, for example, and enter the new phone number. If you are adding a Primary phone number, be sure to change the code of the other primary phone number to Parent or Other, since there should be only 1 primary phone number.

**If you are unable to type over the information,** click on FILE / FIELD DELETE or press F4, then enter the correct information.

- Press F9 or click on FILE / CLOSE to save this information and exit (or press F10 or click on FILE / SAVE to save and stay in this screen).

- **IF YOU ARE CHANGING INFORMATION IN THE SYSTEM, TYPE OVER THE EXISTING INFORMATION.**
- **IF YOU ARE ADDING INFORMATION, GO TO A BLANK FIELD AND ADD THE NEW INFORMATION.**
COMMON DATATEL SCREENS

This section of the manual will familiarize you with common screens you should have access to in Datatel.

Name and Address Entry (NAE)

The NAE screen can be used to view general demographic information for a student, staff or faculty member. The screen displays their full name, preferred address, phone numbers, SSN (if known), Date of Birth (if known), e-mail address and former names. This is the first screen completed when a person is added to the Datatel system. You can also identify the person’s Chapman ID number in this screen.
Address Summary (ADSU)

The ADSU screen can be used to view a person’s different address types such as: billing address, business address, diploma address, former address, temporary address, and pending address. The preferred mailing and residence address is what appears in the NAE screen. Other addresses the person has on file can be found in this screen. To view more specific information on an address, detail in on the address line and select ADR from the menu.
Person Addresses (ADR)

From the ADR screen, you can view more specific information about a person’s address. You may also view the person’s phone and e-mail information.
Applicant Summary (ASUM)

The ASUM screen can be used to view an applicant's information. The top portion of the screen shows the Academic Program of an applicant and/or prospect, the Start Term, Academic Level, Current Application Status with Status Date and the Application Fee Balance. You can also detail down on several other areas of that person's record.
Student Profile (SPRO)

The SPRO screen can be used to view student information. The screen displays a student’s Academic Programs and their Program Status, Student Type, Home Location, and Student Advisor Information. From the SPRO screen, you can also detail into other Datatel screens. (These screens can also be accessed by typing in the mnemonic directly in the mnemonic field in the main Datatel screen.)
AR Account Inquiry by AR Code (ARIQ)

The ARIQ screen is used to view an individual's account information. Transactions are displayed in reverse chronological order by invoice and AR type. Enter the name or ID number in the AR Accountholder LookUp. If a student has multiple AR types, you will need to select one in the AR Type LookUp.

AR Types:
STAR – Student Accounts Receivable
AFAR – Admissions Application Fee Accounts Receivable
EXED – Extended Education
TXAR – Transcripts Accounts Receivable

At the Term LookUp prompt, you may enter a specific term, or press ENTER to look at account information for all terms.
Student Academic Credits (STAC)

The STAC screen is used to view a student’s coursework and transfer credits. You can view the Course name, Course title, status of the Course, the number of credits, the Term and the Grade.
Print Screens

All reports go through several print screens before the report prints. You have your initial screens where you select your criteria. Then you may also get a screen to choose the sorting criteria (normally left as is). Finally you will see the print screens. These are described in the following pages.

<table>
<thead>
<tr>
<th>Print Screen #1 fields</th>
<th>Choices</th>
</tr>
</thead>
</table>
| Output Device          | P = Printer (network printer)  
                          | A = Aux (local printer)  
                          | H = Hold/Browse (screen) |

| Printer                 | The printer will default to your location’s laser printer, or you can LOOKUP another location’s printer and print to their printer. You can lookup your location’s printer name by typing “AC##…” Where the ## is your two digit location number (i.e. “AC37…” will show all the printer’s for Sacramento). |
Accept all other defaults by pressing **F10**, or the single disk button.

![Print Screen #2](image)

**Figure 2  Print Screen #2**

<table>
<thead>
<tr>
<th><strong>Print Screen #2 fields</strong></th>
<th><strong>Choices</strong></th>
</tr>
</thead>
</table>
| Execute in Phantom Mode?                      | **N** = Print  
Will display Figure 3 on monitor.                                     |
|                                               | **Y** = You’ll be prompted for Phantom or Batch and doesn't display Figure 3 on monitor. |
| Phantom / Batch Queue                         | **P** = Phantom Process  
You want the report to print right away, but you do not want to watch the report execute on your monitor. |
|                                               | **B** = Default Batch Queue  
You want to schedule your job for later.                                   |
| Batch Start Time                              | If you chose Batch mode, you’ll need to enter the time you want the report to print. |
Accept all other defaults by pressing **F10**, or the single disk button.

You then get the following Progress Screen.

![Progress Screen](image)

**Figure 3  Progress Screen**

- On the right side of the screen, you can monitor the progress of the report you selected. As the report is compiled, a black bar on the right side of the screen will rise as it fills in the percentages. After the bar reaches 100%, a message will appear “RETURN to continue...” (see arrow above). Press ENTER and the above screen will disappear.

- If you chose to print the report in Figure 1, it should start printing to your default Datatel printer.

- If you chose to view the report in Figure 1, Datatel will say “Now browse the Hold files” and your report will appear in the Report Browser on your monitor like the following page.
At the top of the screen you will see some icons:

- The **Open Door** icon will exit the Report Browser and return to the Datatel menu. You can also press **F9** to exit.

- The **Monitor** icon will import the file to your PC. You will be asked where to save the file on your PC.

- The **Up Arrow Paper** icon means to page up.

- The **Down Arrow Paper** icon means to page down.

- Tells you what page you are on and how many total there are (i.e. “1/2” means you are on page 1 of 2 pages).

- The **F Paper** icon means to go to the first page.

- The **L Paper** icon means to go to the last page.

- The **Print Local** (first) printer icon means Datatel will try to print to the printer that is attached directly to your PC. You can change the selected printer if you choose to. **Normally this icon is not used.**

- The Print Remote (second) printer icon means Datatel will print to the Datatel printer. Once you select this icon, Datatel will bring up the Print Screen similar to Figure 1 above. Just press **F10** through Figures 1 & 2 to get your printout.