

Solutions Data Entry Procedures

These instructions exist to provide consistent methods and standards for entering information in to the Solutions database. The reports we pull out of Solutions are only as good as the data we put in, which is why we must be vigilant about proper data entry.

- Proper spelling is important. If you're unsure, look it up, or ask for help.
- Proper capitalization is not optional. All proper nouns must be capitalized.
- No part of a person's profile should be entered in all caps.
- Extraneous punctuation and/or spaces cause hours of extra work when we pull labels, because Solutions reports exactly what you entered exactly the way you entered it. Any mistakes have to be corrected manually, one by one.

When creating a new user in Solutions:

1. Check to be sure the user is not already in the database.
 - a. Look for alternate names. Users may have been created using nicknames, shortened names, maiden names, or middle names.
 - b. Verify using other profile information. Does the address or email address match what you intend to enter?
 - c. Don't be afraid to ask. "We have someone with your name in our database already. The address is listed as 121 B. Baker Street. Could that have been you?"
 - d. If the user is already in the system, it is critical to continue using the existing entry. Academic and financial records must be maintained with great precision for auditing and accreditation, so duplicate entries for a single person create havoc.
 - e. If the person is in Solutions already, update any profile information and skip to step 4.
2. If the user is not in Solutions, create the user profile.
3. Go to profile
4. Enter as much information as you can in the various Custom Forms.
5. Add the appropriate Attributes.
6. List any notes in Activity Manager. Be sure to give permissions to the correct modules.

When in doubt, ask for help.

Once a user has been created in Solutions, we cannot delete them, so as you enter information, be aware that you are creating a permanent record.

If you think a user needs to be deleted, contact Tina Cooper. Users can only be deleted if they were created in error. Users that we simply wish to terminate contact with must remain in the database.

Adding New Users

Users Administration Module

HelpDesk



Create



Search User



Reports



System Settings



SQL Manager

Create User

Title

Last Name

First Name

Middle Name(s)

Maiden Name

Suffix

Mr., Ms., Mrs., Dr., Rev., etc.

Legal first name, not a nickname or preferred name.

Jr., Sr., III, Ph.D, M.D., D.D.S., etc.

Users Status

- Inquiry
- Applicant
- Applicant Accepted
- Applicant Denied
- Applicant Withdrawn
- Student (Undergraduate)
- Student (Graduate)
- Withdrawn
- Academic Probation
- Academic Dismissal
- Alumni / Graduated
- Friend
- Collections
- Donor
- Staff
- Faculty
- Inactive / Leave of Absence
- First Year/Full Time Student
- Transfer Student
- Deceased
- Behavioral Dismissal

Only one of these categories should be checked for any individual. As a prospective student moves through the steps, their status should be updated accordingly.

Do Not Use:
 Apostrophe '
 Dollar Sign \$
 Percent Sign %
 Number Sign #
 Exclamation Point !
 Ampersand &

Be careful to avoid extra spaces before and/or after entries. Do not enter a space in a field that would otherwise be left blank.

Permanent Mailing Address

Address 1

Address 2

City

Prov/State

Country

Zip/Postal Code

Primary Phone

Use USPS official abbreviations

Use USPS official abbreviations

Use ZIP+4 when possible
 Use 123-456-7890 format.

No parenthesis, dashes only.

Leave blank for United States, use postal abbreviations otherwise

Address While on Campus

Address 1

Address 2

City

Prov/State

Zip/Postal Code

Primary Phone

Use first.last@stscs.org, when available. When adding a user that does not and will not have an SCS email address (like a donor, friend, or other non-student, non-faculty), in the email address section, put first.last, but leave off the @stscs.org part. This will help us distinguish working email addresses from placeholders. **NEVER** put N/A in the email line.

Use fpassword (first initial, last initial, then the word password)

Primary Email

Alternate Email

SMS Contact

ID Number

Password

Account must first be created

User Permissions

- Users Module
- Annual Report
- Library Module
- Recruitment Module
- Program Management Module
- Registrars Module
- Faculty Module
- Student Module
- Finance Module
- Institutional Assessment
- Financial Aid
- Bookstore Module
- Donations Module
- Circulation Module
- Calendar Module
- Classified Ads Module
- OnLine Surveys
- Business Manager
- School Manager
- Church Manager
- SMS Manager
- Student Life
- Facilities
- Webmasters Module

Give students this module. Director of Technology Services Tina Cooper will assign all other modules.

Always tab between fields. NEVER hit enter.

Adding a New Donor

Development and Fundraising

Help Desk:: news



Post Donation



Pledges



Search User



Tools/Reports



Event Tracker

Create New Donor

Title	<input type="text"/>	Mr., Ms., Mrs., Dr., Rev., etc.
Last Name	<input type="text"/>	
First Name	<input type="text"/>	Legal first name, not a nickname or preferred name
Middle Name(s)	<input type="text"/>	
Mailing Address		
Address 1	<input type="text"/>	Use USPS official abbreviations
Address 2	<input type="text"/>	
City	<input type="text"/>	
State	<input type="text"/>	Use USPS official abbreviations
Zip Code	<input type="text"/>	Use ZIP+4 when possible
Country	<input type="text"/>	Leave blank for United States, use postal abbreviations otherwise
Primary Phone	<input type="text"/>	Use 123-456-7890 format. No parenthesis, dashes only.
Primary Email	<input type="text"/>	
	<input type="submit" value="Submit"/>	

Use first.last@stscs.org, when available.
When adding a user that does not and will not have an SCS email address (like a donor, friend, or other non-student, non-faculty), in the email address section, put first.last, but leave off the @stscs.org part. This will help us distinguish working email addresses from placeholders.
NEVER put N/A in the email line.

Do Not Use:
Apostrophe ‘
Dollar Sign \$
Percent Sign %
Number Sign #
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Do not enter a space in a field that would otherwise be left blank.

Always tab between fields.
NEVER hit enter.

User Profile Notes

Always assign ID.

+ [4238] John Doe Document Manager Help

Profile
 Forums
 Library
 Recruitment
 Registrar
 Finance
 Financial Aid
 Development
 Student Life
 + Virtual Terminal

Profile Title - Last Name Doe First Name John Middle Name - Maiden Name - Suffix - Primary Phone 361.991.9403 Alternate Phone 361.991.8634 Primary Email john.doe@stscs.org (e) Alternate Email - (e) SMS Contact Help -	Always tab between fields. NEVER hit enter.	Program Information Program SCSCERT Advisor: Sandra Elizondo Location Home Campus Title IV Year Freshman (0 cr. earn) (3 cr. enroll) (TCR) Accepted Date -- -- -- Graduation Date -- -- -- Accepted Date (G) -- -- -- Graduation Date (G) -- -- -- Last Log On unknown
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<input checked="" type="checkbox"/> Permanent Mailing Address Ship Here Address 1 7000 Ocean Dr. Address 2 - City Corpus Christi Prov/State TX Zip/Postal Code 78412 Country USA	<input type="checkbox"/> Address While on Campus Address 1 Address 2 City Prov/State Zip/Postal Code
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Be careful to avoid extra spaces before and/or after entries. Do not enter a space in a field that would otherwise be left blank.

+ Show Church Membership

+ Show Calendar Events

+ Show Forms

<ul style="list-style-type: none"> Additional User Info Church Information Education Background Inquiry Form Mailing List SCS User Info 	Mailing List Information for pulling address labels.	<p>Enter the preferred mailing name. For example, "Dr. John Donor"</p> <p>Enter the preferred couple mailing name. For example, "Dr. and Mrs. John Donor"</p> <p>Enter the casual greeting. For example, "John"</p> <p>Enter the casual couple greeting. For example, "John and Jane"</p> <p>Enter the Formal greeting. For example, "Dr. Donor"</p> <p>Enter the formal couple greeting. For example, "Dr. and Mrs. Donor"</p>
<p>These fields will be used to create mailing labels.</p> <p>These fields will be used to create form letters.</p>	Print Name As for Mailing Labels <input type="text" value="Please Enter A Response"/> Print Names As When Addressing to Husband and Wife for Mailing Labels <input type="text" value="Please Enter A Response"/> Casual Greeting (ex. Ron instead of Ronald) <input type="text" value="Please Enter A Response"/> Casual Greeting for Couple (ex. Frank and Alice rather than Mr. and Mrs Longbottom) <input type="text" value="Please Enter A Response"/> Formal Greeting (ex. Mr. Potter rather than Harry) <input type="text" value="Please Enter A Response"/> Formal Greeting for Couple (ex. Mr. and Mrs. Weasley rather than Arthur and Molly) <input type="text" value="Please Enter A Response"/>	

+ Show Attributes

Assigned Attributes + assign attribute + attribute list

Do Not Use:
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 Exclamation Point !
 Ampersand &

When entering a new user, be sure to add any appropriate attribute, especially where mailing list items (like NEWS for newsletter) are concerned.

USPS Official Abbreviations

From: <https://www.usps.com/ship/official-abbreviations>

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Be careful to avoid extra spaces
 before and/or after entries.
 Do not enter a space in a field that
 would otherwise be left blank.

Item	Abbreviation
Suffix	
Boulevard	Blvd
Center	Ctr
Circle	Cir
Court	Ct
Drive	Dr
Lane	Ln
Place	Pl
Road	Rd
Square	Sq
Street	St
Terrace	Ter
Trail	Trl
Unit Designator	
Apartment	Apt
Floor	Fl
Room	Rm
Suite	Ste

State/Possession		State/Possession	
ALABAMA	AL	MONTANA	MT
ALASKA	AK	NEBRASKA	NE
AMERICAN SAMOA	AS	NEVADA	NV
ARIZONA	AZ	NEW HAMPSHIRE	NH
ARKANSAS	AR	NEW JERSEY	NJ
CALIFORNIA	CA	NEW MEXICO	NM
COLORADO	CO	NEW YORK	NY
CONNECTICUT	CT	NORTH CAROLINA	NC
DELAWARE	DE	NORTH DAKOTA	ND
DISTRICT OF COLUMBIA	DC	OHIO	OH
FLORIDA	FL	OKLAHOMA	OK
GEORGIA	GA	OREGON	OR
GUAM GU	GU	PALAU	PW
HAWAII	HI	PENNSYLVANIA	PA
IDAHO	ID	PUERTO RICO	PR
ILLINOIS	IL	RHODE ISLAND	RI
INDIANA	IN	SOUTH CAROLINA	SC
IOWA	IA	SOUTH DAKOTA	SD
KANSAS	KS	TENNESSEE	TN
KENTUCKY	KY	TEXAS	TX
LOUISIANA	LA	UTAH	UT
MAINE	ME	VERMONT	VT
MARSHALL ISLANDS	MH	VIRGIN ISLANDS	VI
MARYLAND	MD	VIRGINIA	VA
MASSACHUSETTS	MA	WASHINGTON	WA
MICHIGAN	MI	WEST VIRGINIA	WV
MINNESOTA	MN	WISCONSIN	WI
MISSISSIPPI	MS	WYOMING	WY
MISSOURI	MO		

Forms of Address

Situation	Options/Notes
Addressing a Woman	
Maiden name	Ms. Jane Johnson or Miss Jane Johnson* *usually 'Miss' is for girls under 18
Married, keeping maiden name	Ms. Jane Johnson
Married, uses husband's name socially	Mrs. John Kelly or Mrs. Jane Kelly* or Ms. Jane Kelly *Nowadays this is acceptable
Separated, not divorced	Mrs. John Kelly or Mrs. Jane Kelly or Ms. Jane Kelly
Divorced	Mrs. Jane Kelly or Ms. Jane Kelly or Ms. Jane Johnson (maiden name)
Widowed	Mrs. John Kelly* or Mrs. Jane Kelly or Ms. Jane Kelly *If you don't know the widow's preference, this is the traditional and preferred form
Addressing a Couple	
Married, she uses her husband's name socially	Mr. and Mrs. John Kelly
NOTE: Traditionally, a man's name preceded a woman's on an envelope address, and his first and surname were not separated (Jane and John Kelly). Nowadays, the order of the names—whether his name or hers comes first—does not matter and either way is acceptable. The exception is when one member of the couple 'outranks' the other—the one with the higher rank is always listed first.	
Married, she prefers Ms.	Mr. John Kelly and Ms. Jane Kelly or Ms. Jane Kelly and Mr. John Kelly *Do not link Ms. to the husband's name: Mr. and Ms. John Kelly is incorrect
Married, informal address	Jane and John Kelly or John and Jane Kelly
Married, she uses maiden name	Mr. John Kelly and Ms. Jane Johnson Ms. Jane Johnson and Mr. John Kelly If you can't fit the names on one line: Mr. John Kelly and Ms. Jane Johnson *Note the indent, either name may be used first
Unmarried, living together	Mr. John Kelly & Ms. Jane Johnson Note: Use one line
A woman who outranks her husband: elected office, military rank	The Honorable Jane Kelly and Mr. John Kelly If you can't fit both names on one line (note indent): The Honorable Jane Kelly and Mr. John Kelly
A woman who outranks her husband: professional or educational degree	Dr. Jane Kelly and Mr. John Kelly
Both are doctors (PhD or medical) and use the same last name	The Doctors Kelly (omit first names) Drs. Jane and John Kelly / Drs. John and Jane Kelly Dr. John Kelly and Dr. Jane Kelly / Dr. Jane Kelly and Dr. John Kelly
Both are doctors (PhD or medical), she uses her maiden name	Dr. Jane Johnson and Dr. John Kelly Dr. John Kelly and Dr. Jane Johnson
Business	
Woman	Ms. is the default form of address, unless you know positively that a woman wishes to be addressed as Mrs.
Professional designations—use only for business	Jane Kelly, CPA
Note: Do not use Ms. or Mr. if using a professional designation. Socially, drop the professional designation and use Mr., Ms., or Mrs.: Ms. Jane Kelly	
Esquire: Attorneys and some court officials	Jane Kelly, Esquire
Note: If using Esquire, do not use Ms. or Mr. In conversation or socially, 'Esquire' is not used; use Mr. or Ms.: Ms. Jane Kelly	
Attorney at Law	Ms. Jane Kelly Attorney at Law

This is an alternative to 'Esquire' for attorneys. Use Mr. or Ms. and use two lines with no indent

From: <http://www.emilypost.com/forms-of-address/titles/96-guide-to-addressing-correspondence>

Official Forms of Address

Person	Letter Address
Protestant Clergy	The Reverend Full Name Name of church Address
Protestant Clergy, with doctorate	The Reverend Full Name, D.D. Name of church Address
Attorney	Full Name, Esq. (or J.D., if held) or Mr. / Mrs. / Ms. Full Name Address
University Professor	Professor Full Name or Mr. / Mrs. / Ms. Full Name (or Dr., if held) Address
Physician	Full Name, M.D. or Dr. Full Name Address
Dentist	Full Name, D.D.S. or Dr. Full Name Address
State Legislator	The Honorable Full Name Address
Mayor	The Honorable Full Name Mayor of City Address
Federal Judge	The Honorable Full Name U.S. Court of _____ Address
Senator	The Honorable Full Name United States Senate Washington, DC or district office address
Representative	The Honorable Full Name United States House of Representatives Washington, DC or district office address