

CollegeTracker Functional Areas

It is important to provide a means of quickly determining if this program will provide what is needed to meet a college's basic needs. This list provides a listing of most of the features present in this system. If you do not see an important item on the list, please contact us and we will either let you know about how that feature works or let you know when to expect the feature to be added if it makes sense for a small to medium sized college.

All Students, Faculty, and Administrative staff

- All users (and each role for a user) have a separate login which allows us to configure profiles for each person more specifically. For instance, a student profile allows the student to access the items that are of interest to them without giving them access to other areas which need greater security.
- Specify answers to challenge questions which will allow a user to reset their own password. Currently, uses 13 questions which are used randomly to determine whether the request is legitimate.

Applicants

- Potential student can fill in an on line college application
- Administrators can monitor and update application status as data is received
- Potential student can view the status of items needed for admission
- Administrators can print out the application information for a review panel.
- When approved, applicant's information can be transferred to the student list.
- Applicant can upload a picture of themselves during the application process.

Calendar

- A basic event calendar.
- No repeating dates provided at this time.
- All day and multi-day events are handled.
- The list can be filtered to only include a particular type of event.
- The view can be changed to encompass a day, month, or year.
- The current view can be displayed as a report which is printable.
- Event types can be color coded to help them stand out

Classes

- Define classes
- Define pre-requisite and co-requisites for a class
- Associate a syllabus with a class for a particular term
- Define multiple sections for a class.
- Define a replacement for a discontinued class
- Define a standard set of credit transfers into this college.
- Rules related to registration can be configured for each college including classes that must be taken in certain situations or to configure registration related items.
- View the classes for a particular term
- View the syllabus for a particular term
- Students can be registered for Independent study classes easily.

E-Mail

- Basic e-mails can be sent from within the program
- Various lists of users can be selected as the “To” list (on-campus students, off-campus students, faculty, staff)
- A list of selected e-mail addresses can be displayed and copied to any e-mail program to allow for more creative e-mail messages to be created.

College

- Define preregistration requirements – for instance, do all students preregister at the same time or, do seniors get to register first.
- Specify when preregistration ends.
- Define how many credits are needed to be in a particular grade level.
- Import current college data defined in CSV (comma separated values) format.
- Specify the complexity of passwords by specifying the minimum length, and number of characters of various types required when changing a password
- Specify how long a password can remain unchanged.

Donors

- Define a donor
- Define accounts (deductible and non-deductible) for use by donors
- Enter donation amounts and split the donation between accounts
- Display and print a Gift report for a donor.
- Display and print an end of year report for a donor.
- Add a picture of the donor.

Financial

- Synchronization is currently in place for communicating with Quickbooks (TM of Intuit). Other interfaces may be possible in the future if/when there is a need.
- New student information automatically synchronized to financial program.
- Student updates (name, e-mail address, address, etc) are synchronized from CollegeTracker into Financial tool.
- Financial data (Invoices) for individual students available even when the office is closed and financial program is off line. Will display information cached within the CollegeTracker system.
- Account information (Items) are imported from the Financial tool into CollegeTracker.
- Billing rules can be configured for each college.
- Additional features may be added if/when they are needed.

Faculty

- Add and view faculty members
- Can add a syllabus for a class they are teaching
- Can enter grades for classes taught
- Advisors can view the list of students and perform program audits
- Can update/add their own picture
- Can specify groupings of assignments and enter assignment scores as well as give a “weight” to each assignment and each group. Once complete, this allows the program to automatically calculate a “raw” weighted final grade for each student.

Goals

- Define a custom goal for anything which can be quantified with a number.
- Set the goal value for a particular year
- Set the actual value of the goal for a year
- Produce graphs for the goals defined (including user created goals)

Help

- Page level help is provided throughout the application
- Defines what a particular page is supposed to do and how the page is supposed to work.
- Defines what each field on a page is there to provide.
- Page can be displayed via a PDF (Acrobat reader) file which pops up in a browser. Or, it can be opened via a popup within the program.

Pictures / Styles

- Faculty, students, applicants, and donors can have pictures associated with them.
- Administrators can approve, reject, and delete any picture uploaded to the system.
- Pictures will not be displayed until approved.
- Multiple pictures can be uploaded and approved for each user and the user can then choose between them.
- The college logo is also a picture and can be updated at any time.
- The style sheet (which defines the background and styles of pages) can be defined which will change the color scheme of the college's copy of the application. A standard setup is already in place.

Programs

- Create definitions of degree programs for the purpose of automated program audits
- Define program rules that can be applied to multiple degree programs
- Run a comparison between classes a student has taken and what is necessary for a particular degree.

Prospects

- Track prospective student contacts
- Record correspondence with the prospective student by date
- Connect prospective students with an application when they have applied (for reporting purposes).

Reference Data

- A predefined set of reference categories have been defined – a college can customize what is displayed in particular drop downs and on forms by adding entries into our Reference Data library.

Reports

- Generate reports related to the start of a semester such as students/class, credits/student, etc.
- Generate reports related to the end of a semester such as report cards
- Generate audit reports showing activities performed by students and faculty members
- Generate graphs for goals, FTE, avg grade/class, plus more
- For a complete list of all reports, please let us know. We have 62 different reports

defined currently and add new ones as the need arises.

Students

- Students can:
 - Preregister for classes.
 - View their grades for all assignments entered into the system.
 - See a list of classes offered in any term as well as the details for those classes.
 - Obtain a syllabus for a class from the system.
 - See an approximation of their semester bills (requires Financial connection)
 - See their current financial position at the college (requires Financial connection)
 - Upload a picture of themselves subject to administrative approvals.
- Administrators can:
 - Drop/add classes and register students for classes.
 - Allow a student to audit a class.
 - generate a transcript for the student.
 - Enter credit transfers for a student.
 - Track disciplinary actions underway and record the resolution of those actions.
- A transfer library is available which can streamline entry of credit transfers.
- Can identify when a student has not achieved a minimum average grade for a term and show them on an academic probation report.
- No automatic process is in place to suspend a student – however, enough history should be present to allow that determination to be made.

Term (semester) setup

- Define when a term (semester) starts and when preregistration should begin.
- Specify what classes will be offered in a particular term using a configurable class rule engine.
- Override class rules or add classes that are offered on a less regular basis.

Users (administrators, students, and faculty)

- All people who can log into the system have the ability to change their own password
- Administrators have the ability to create new administrative users.
- Administrators can reset anyone's password.
- Each user is associated with a profile which defines which pages, prompts, and buttons are visible, hidden, or disabled.
- An administrator can change any user's profile within the bounds of the profile group they are in (students can only have a profile from the student group and so

forth).

Volunteers

- Can track volunteers
- Can record activities a volunteer is willing to perform for the college.
- Can record activities a volunteer has done
- Can enter hours spent in case the college wishes to track this for tax purposes.

In addition to the features listed above, CollegeTracker can be installed in several configurations.

1. “On-site” - in this configuration, the college would have their own server with a database and application server installed on it. This configuration will give you the best network throughput and, also, the most control over your sensitive data but, has the downside of you needing to maintain your own database backups for continuity purposes. The server must be placed where anyone (students, teachers, faculty, applicants) needing to get to the system can access it. Also, server updates will be the responsibility of the college or will require an on site visit from us which, depending on the circumstances, might require you to pay for travel expenses.
2. “Hosted” - in this configuration, B&R Solutions will provide a server configured to meet the needs of the college, there is a small monthly cost for this service. The main advantage is that B&R Solutions will maintain the server and backup the database when necessary. There is slightly more liability in this configuration because B&R Solutions personnel will have access to your data and network traffic has the potential of being “sniffed”. We can minimize the impact of this using HTTPS and other means but, cannot eliminate it completely. The servers we currently have are available 99.9% of the time – there are occasional maintenance outages which are usually late evening.
3. “Hybrid” - In this configuration, we configure a “proxy” server which sits on your network and provide quick access to data. This “proxy” then synchronizes information to a server on our network which is available to anyone with log on access to your application. This is beneficial if you want to put in a server for your administrative people to access but, do not want to open this location up to teachers or students. Usually, the data will be available on our server within 30 minutes.

We have the ability to import information from spreadsheets and databases to a format that CollegeTracker can use. No matter how your data is currently stored, we have various plans for handling Data Conversion:

1. No conversion – if your college is primarily a one year college OR you have classes that are assigned to all students in a given grade (or similar situations), you may be able to just start using CollegeTracker with your next incoming class and not convert any of your existing data. In this situation, configuration/setup will only take a few days
2. Partial conversion – if you want to get your system up and running fairly quickly, the easiest option is to only convert existing students to CollegeTracker. Depending on the size of your college, this technique can take a few days to less than a month to finish
3. Full conversion – in this case, you would want to pull all historical data/students into CollegeTracker. Depending on how your data is currently organized, this will

take an extensive amount of time.

So far, we have done data imports using data in spreadsheets as well as manual entry of data kept in WordPerfect documents and translation of Access Database information (via a conversion of the data to MySQL using an Access to MySQL conversion tool). We have the facility to also do direct migration of data stored in SQL compatible databases providing we can have temporary access to your database, that there is a JDBC driver for your particular database, and that we can figure out from the table structure where we need to import that data. This would be our preferred route but, so far, have not had the opportunity to use it.

If you have any question on anything you have read in this document or have other questions on things not covered, please contact us at 406-388-8163 or by e-mail at richard.passmore@brsolutionsmt.com. If contacting by phone, please be prepared to leave your name, contact information, and a brief message about what you are trying to find and, of course, the best time to contact you. I will respond as quickly as I can.