

CollegeTracker – Illustrated Tour

**A guide to the basic functionality of a web based College
Administrative application.**

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CollegeTracker – the Illustrated tour

Welcome to CollegeTracker – a simple web-based College Administrative system. This document will guide you through the steps of creating and using the various kinds of “objects” which make up the CollegeTracker system. By the end of this tour, you should have a very good idea of what is and isn't currently included in the system.

First, let me explain how this program came into existence. In 2005, myself and another friend (Matt Aznoe) were approached by the president of a small Bible College (Mark Amunrud). He explained that there really were no affordable administrative applications available to meet the needs of a small college such as his. He gave us a general overview of the functionality he felt was most important for his college and we agreed to begin working in our spare time to develop a solution. As a proof of concept, we developed the Donor portion of the system first (start with the easy parts first). At about this time, my partner in the project decided that, with his growing family, he didn't really have the time to devote to this activity. I then talked to my friend, Brett Tandy who agreed to help complete the project. We have been working nights and weekends for 8 years putting together a system which now meets many of the needs of this college. During this time, the college has become accredited and is using our program and the reports it generates to help with some of the reporting and tracking requirements of the accreditation board. Our program and its capabilities also contributed to a certain degree in the college becoming accredited. Due to this effort, we have developed many generic reports and graphs which are now part of this college's standard reports for the accreditation board. We are continuing to refine and enhance the core of the program and, as time and money are available, will continue to do that. We currently have 3 colleges using this program – all are fairly small bible colleges and each is either accredited, working on getting accreditation, or thinking about going through that process.

This document presents a demonstration of what we currently have from an administrative point of view. We have set up a test environment which can be accessed and used by multiple colleges to see if CollegeTracker works for them. To access the test environment, please point your browser to <https://test.brsolutionsmt.com/CollegeTracker> which will allow you to try out the system. There is a small amount of data present in the system and you can feel free to add more test data if you feel like it. If you become interested in setting up your own college in CollegeTracker, let us know and we can set up an environment just for you in less than a week.

As with any tour, there are many paths we cannot travel in the time and space allotted, however, feel free to deviate from the tour at any time to explore other pieces of the program. Most areas should be fairly self explanatory – others may require you to click on the Help menu item so you can get an idea of what can or should be done on a particular page. The help system is still an ongoing development effort – while present, it may not be as helpful as you (and I) may desire. If you find flagrant holes in documentation or have suggestions, feel free to send us some feedback at (contact@brsolutionsmt.com) and we'll attempt to correct the deficiency as soon as possible.

Technical conventions

As with anything technical, we need to agree on some conventions:

When the document says	You should do
Go to XXX YYY	Find a menu item at the top center of the page

	named XXX and a sub-item of that menu called YYY and select it.
Click the XXX button	Find a button in the main window with a label of XXX and click it. Most buttons are near the top of the page with the exception of Browse buttons and similar unique cases.
Click the XXX tab	Within the main window, you should see tabs, find the one labeled XXX and click on that label.
Click the XXX link	Links are a common convention within a list of data, Clicking on one of these links in this program will take you to a new page to edit this item. Links can also provide an easy way to email a contact – there are some of these present also.

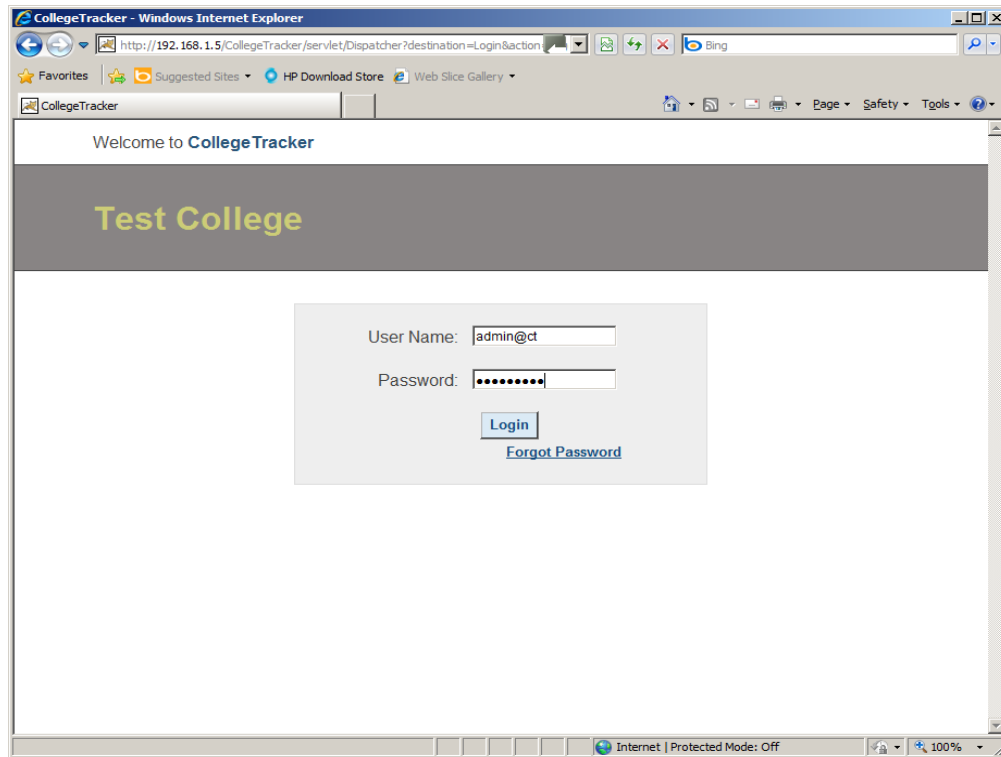
OK, let me explain how to use this tour most effectively. I will present one section of the application at a time and will expect you to do a small amount of typing and clicking to keep up. A picture of the page will be present in the document to show all significant steps in the process. However, I will not display every possible step in the process if I can define the process using the conventions outlined above. The application is optimized to work best on Internet Explorer, Chrome, and Firefox although other browsers should also work. The only browser that has really given us grief is one of the browsers on Apple computers (don't remember which one) and, most of those had to do with not being able to view/print reports or fill in Acrobat Reader forms.

Setup

This demo is presented using a hosted application server so, the setup on your end is non-existent. Just use the URL provided (<https://test.brsolutionsmt.com/CollegeTracker>), the user name “[admin@ct](#)” and password of “cttesting” and you should be good to go. This login is an administrative login – while we can easily reset the password and other things, we'd appreciate it if you didn't change this password as it might prevent some other college from exploring our system. You can create your own users (Administrative, Teacher, or Student) so you can see what the experience will be for these types of users if you would prefer. Anywhere you find a “New” button on a page displaying students, contacts, teachers, or staff, you should be able to add a new user. You will need to immediately change the password since we won't be telling you at this point what the algorithms used for assigning passwords is. Please note, the screen prints, while for the test system, are done from a place that's co-located with the environment and, therefore, I am not using the real URL to get to the environment.

The Tour Begins

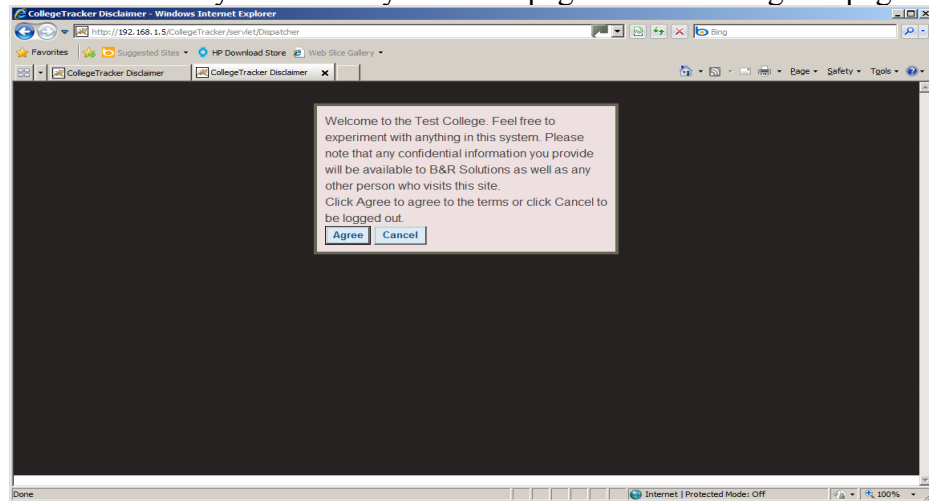
Ok, we are now ready to begin the tour of the program. To start, open a browser windows and, using the URL <https://test.brsolutionsmt.com/CollegeTracker>. You should get a page which will look something like this:



Welcome/Disclaimer

Enter the appropriate credentials, in this case, for user name, enter **admin@ct** and for the password, enter **cttesting** – click the Login button or press the enter key.

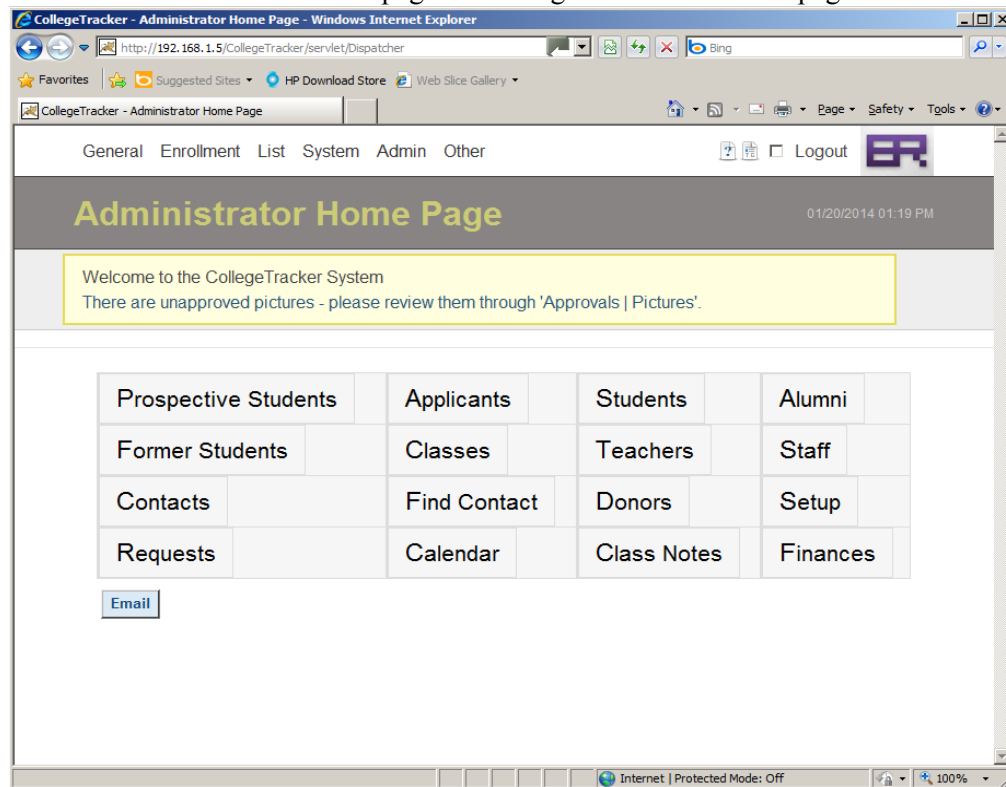
After successfully logging in, the Welcome/Disclaimer page may be displayed, this will be information provided by the System Administrator and can be changed in the School Setup area. If there is no text entered, you will be immediately directed to your home page without seeing this page.



If you agree to the terms given, press the agree button. The text here serves as a warning that any information you provide will be available to anyone who accesses this copy of the application from the internet (literally, could be used by ANYONE) – so, be careful not to enter sensitive data here.

Home Page

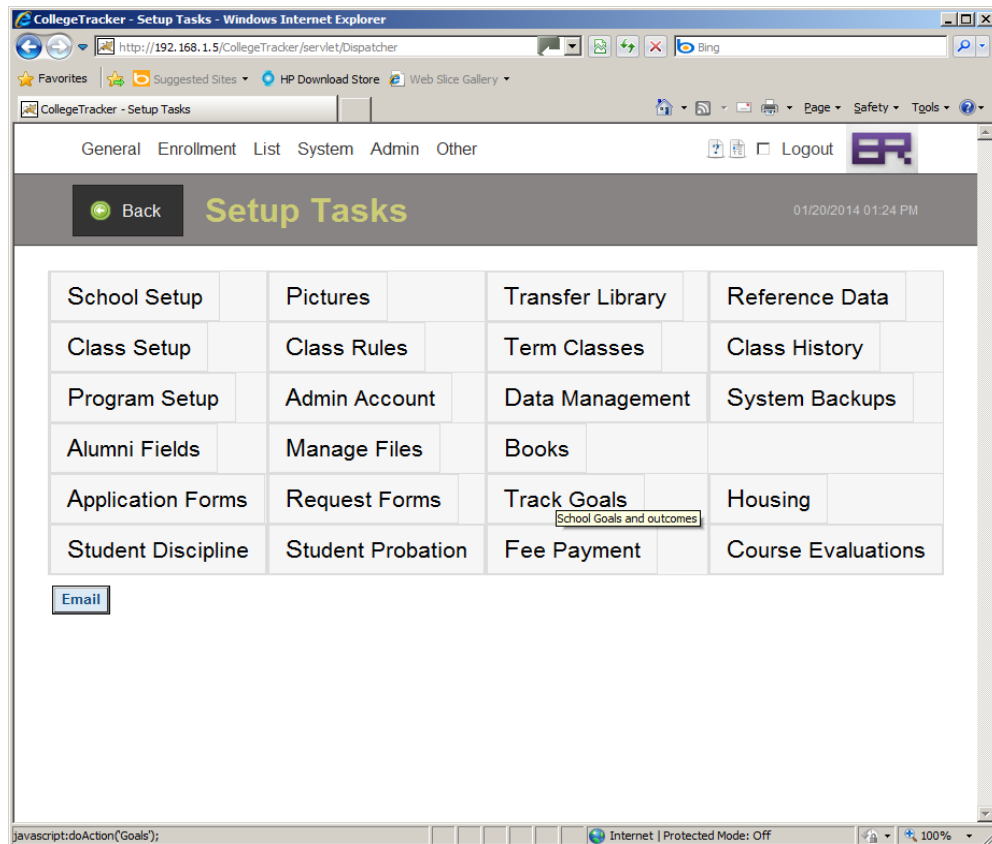
You should now see the administrative home page with categories similar to this page:



Across the top are a row of drop down menus. If you hover over the “General” text, you will see some general purpose functions available in the program. To see the meaning of all the menu options, see [Appendix A](#). Clicking on the top level menu items (such as General) will return you to your home page (in this case, Administrator Home) any time you want.

Setup home page

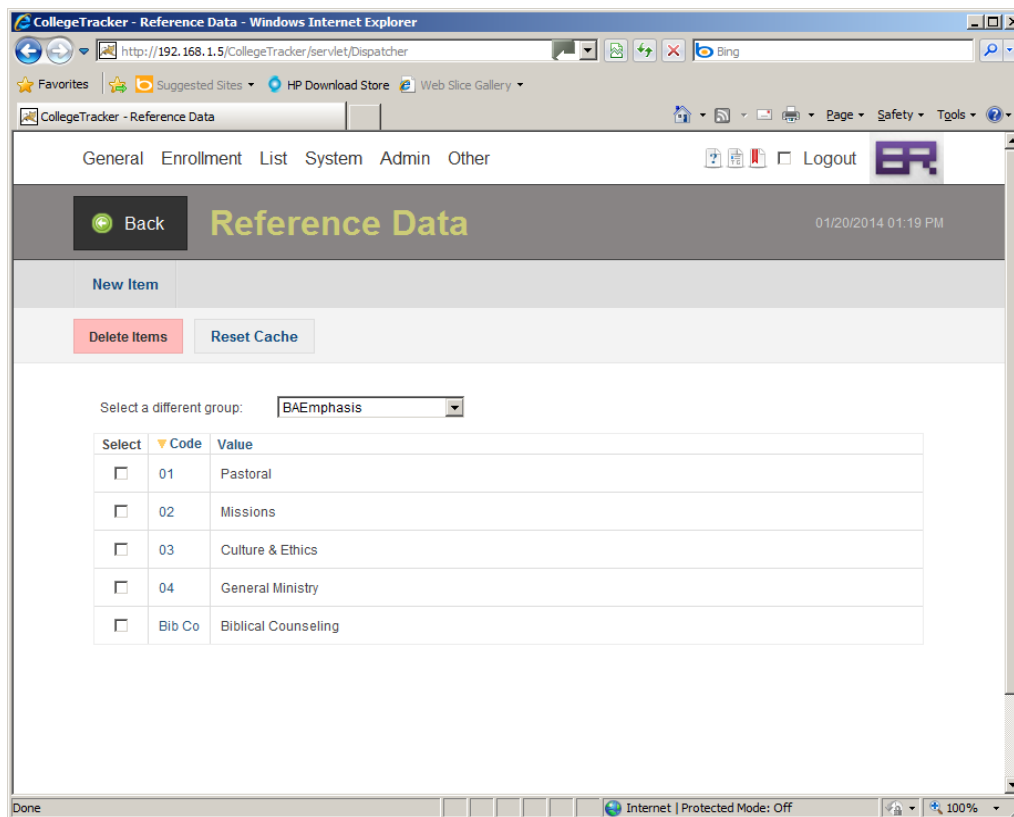
On the Administrator Home page, find and click on the Setup link which will take you to a page that categorizes the various areas of customization that a college has available to them.



You will also notice that there is now a “Back” button in the title area of the page, the Back button will be displayed whenever you have navigated away from your home page and will take you one page up in the “stack” of pages you have visited.

Reference Data

From the Setup home page, click on “Reference Data”:



Look at some of the groups by selecting options within “Select a different group”. After looking around, select “EventTypes” from the list. Click the **New Item** button which will display the following page.

Enter a new code – such as “B01” and a description of “Full Board Meeting” and then click the Save button. The code can be up to six characters although three is frequently enough. You will be returned to the Reference Data page. Add any other types of reference data you would like using this same technique. After entering all data of interest, make sure to click the Reset Cache button (on the Reference Data page) so the changes will take effect in the program.

The screenshot shows a web browser window titled "CollegeTracker - Edit Reference Data Item for EventTypes". The address bar shows the URL "http://192.168.1.5/CollegeTracker/servlet/Dispatcher". The browser's toolbar includes buttons for Back, Forward, Stop, Reload, and a search bar. Below the toolbar, there are links for Favorites, Suggested Sites, HP Download Store, and Web Slice Gallery. The main content area has a navigation bar with links: General, Enrollment, List, System, Admin, Other, and a Logout button. The page title is "Edit Reference Data Item for EventTypes". Below the title, there is a "Back" button and a "Save" button. The form contains two input fields: "Code" and "Description". The "Code" field is currently empty, and the "Description" field is also empty. The page footer shows the date and time "01/20/2014 01:20 PM".

To return to Setup home, click the back button until you are back on that page.

College Setup

Next, let's set up some data specific to your college. Click on School Setup from Admin Home. From this page, you will be able to specify some data which should be very familiar to you. You will also be allowed to modify the school logo displayed (will demonstrate this later). The page will look something like:

CollegeTracker - Standard School Setup Information - Windows Internet Explorer

http://192.168.1.5/CollegeTracker/Servlet/Dispatcher

General Enrollment List System Admin Other

Back Standard School Setup Information 03/01/2014 06:25 PM

Update Logo Update Token

Save

General

School Name Test College

Address 191 New St

City, State, Zip Somewhere MT 59001

Phone (406) 656-9950

School Web Site

Administrative E-mail

Library Web Site

Library Phone

Use Fiscal Year? ☒

Using this page, you could modify the parameters displayed to match what your college would normally use. Note that there are multiple tabs to better organize the information within the page. Clicking on a tab will show you whatever details that tab contains and, in most cases, will allow you to edit this information. The “Contributors” tab is our way of showing the tools that we have used to develop this system. There are at least 3 reasons to mention these open source tools. First, some of them ask to be mentioned within any work based on their framework so, we want to give them their proper recognition. Second, we couldn't have done what we do without these tools. Finally, we want to give anyone that feels like doing some coding some ideas of some good frameworks to use.

Password setup

Within the School Setup, click on the Password Settings tab.

The screenshot shows a web browser window titled "CollegeTracker - Standard School Setup Information - Windows Internet Explorer". The address bar shows "http://192.168.1.5/CollegeTracker/jservlet/Dispatcher". The page has a navigation bar with tabs: General, Enrollment, List, System, Admin, and Other. Below this is a "Standard School Setup Information" header with a "Back" button and a timestamp "03/01/2014 06:25 PM". There are buttons for "Update Logo", "Update Token", and "Save". A sidebar on the left lists menu items: General, System Message, Password Settings (selected), Registration, Class Minimums, Welcome/Disclaimer, Application, and Contributors. The main content area shows password configuration fields:

General	Minimum Password Length:	<input type="text" value="8"/>
System Message	Minimum Allowed Lower Case Characters:	<input type="text" value="0"/>
Password Settings	Minimum Allowed Upper Case Characters:	<input type="text" value="0"/>
Registration	Minimum Allowed Numeric Characters:	<input type="text" value="0"/>
Class Minimums	Minimum Allowed Special Characters:	<input type="text" value="0"/>
Welcome/Disclaimer	Maximum password age:	<input type="text" value="-1"/>
Application		
Contributors		

As you can see, you can configure different attributes of the passwords which will be allowed within this system so as to keep your data safe. In this particular case, since this is a test/demo environment, we do not have any safeguards in place at this point in time. In a production environment, we recommend that every school have at least 3 of the top 4 categories set to at least require 1 character of that type... For instance, a password of my last name (passmore) could be broken by somebody that knows me in a matter of seconds but, a password of "Passm1re" would take a little longer... A password of "Pa\$\$m1re" would take slightly longer since most people could guess that somebody might replace an s with a \$... But, a GOOD password wouldn't be based on anything anyone other than myself knows about so, perhaps, my favorite color, my phone number, and some random special characters would probably be a good choice – so "Bl^e92%7" might be fairly effective although, perhaps harder to remember... No, I haven't given you ANY password or clue about a password that I use ANYWHERE. :-)

Welcome/Disclaimer Setup

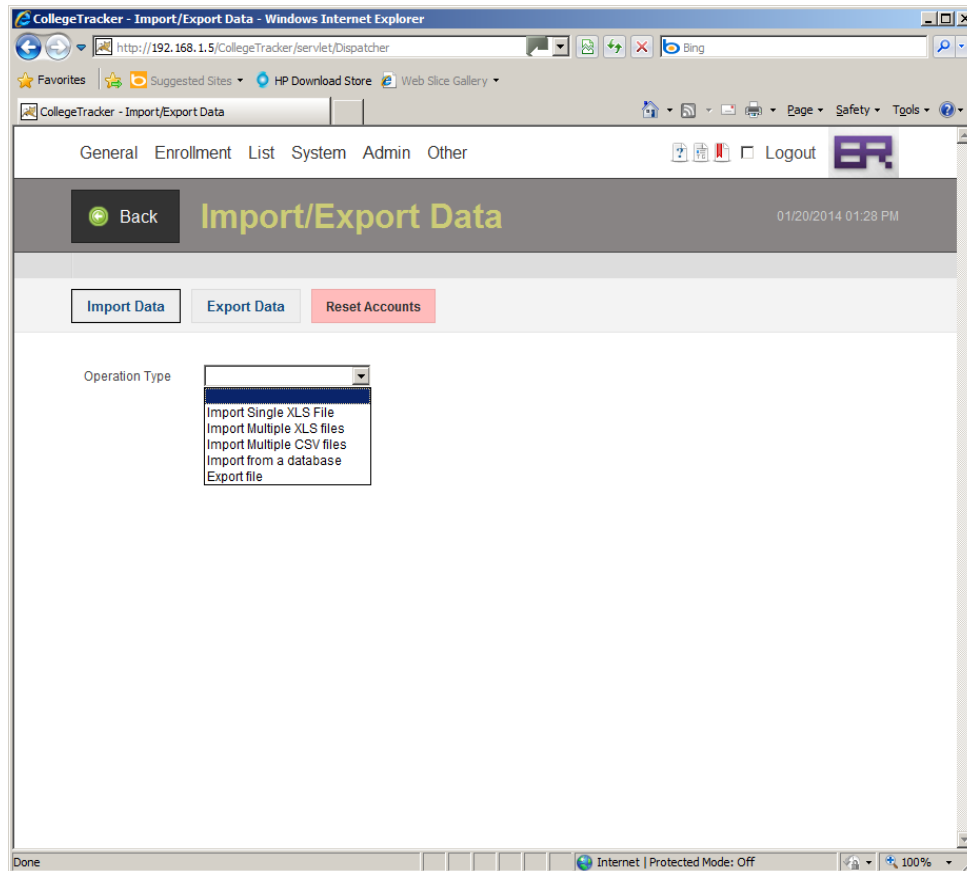
Next, click on the Welcome/Disclaimer tab in School Setup.

The screenshot shows a web browser window titled "CollegeTracker - Standard School Setup Information - Windows Internet Explorer". The address bar shows the URL "http://192.168.1.5/CollegeTracker/servlet/Dispatcher". The browser's Favorites bar includes "CollegeTracker Disclaimer" and "CollegeTracker - Standar...". The page has a navigation menu with tabs: "General", "Enrollment", "List", "System", "Admin", and "Other". A "Logout" button and a logo are also present. The main content area is titled "Standard School Setup Information" and includes a "Back" button, "Update Logo", "Update Token", and a "Save" button. A sidebar on the left lists various setup categories: "General", "System Message", "Password Settings", "Registration", "Class Minimums", "Welcome/Disclaimer" (which is selected), "Application", and "Contributors". The main content area for the "Welcome/Disclaimer" tab contains a text box with the following text: "The welcome message will be displayed after the logon page and will allow a college to give information about the system, welcome new users and give legal notice of any restrictions on use. If this is left blank, then the system will automatically skip this page and go directly to the home page." Below this is a text area for the "Welcome/Disclaimer message:" with the following text: "Welcome to the Test College. Feel free to experiment with anything in this system. Please note that any confidential information you provide will be available to B&R Solutions as well as any other person who visits this site."

This tab allows you to enter a message which will be displayed to every user as they log in. The system will then display this on the Disclaimer page (mentioned above) whenever a user logs into the system. The message should be fairly terse, easy for anyone with basic English skills to be able to read and understand, and, of course, customized for your particular school.

Import Existing Data

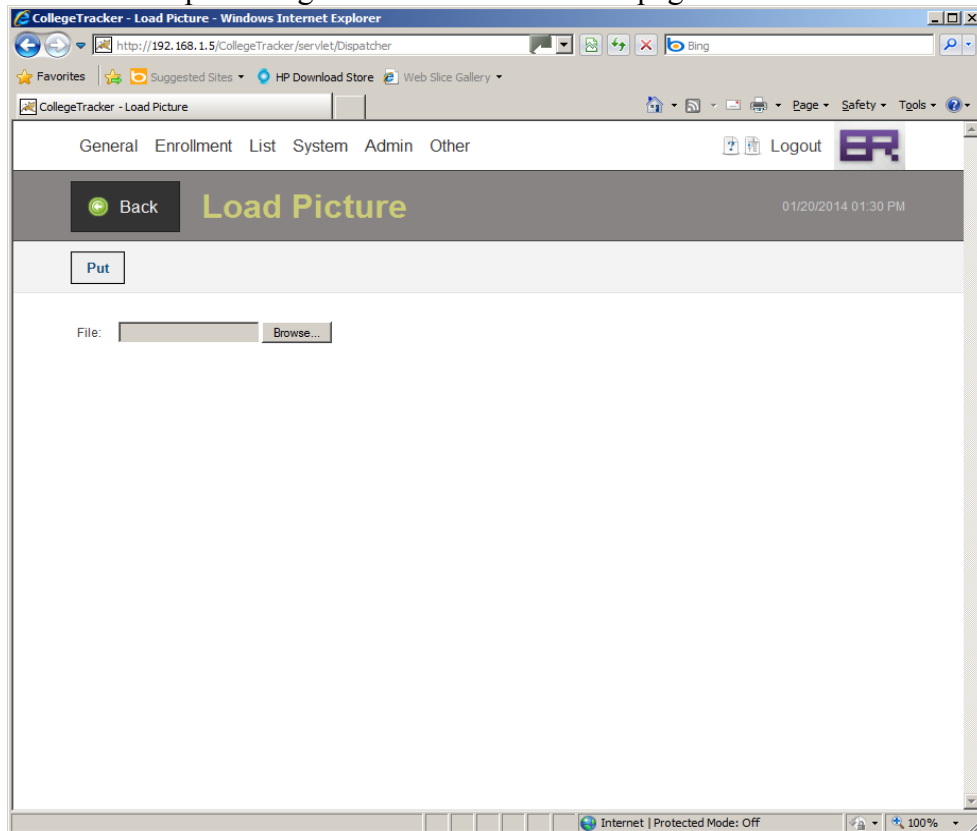
From Setup home, click on Data Management. From this page, you can import data for your student population as well as class history, student history, and faculty information. The page will look like the following:



We have pre-loaded a set of test data into this database so, you don't need to import anything. However, if you wanted to, you could do so. We have the ability to import data from spreadsheets or, using a JDBC connection, we can also import directly for your existing database using mappings you define within a simple spreadsheet. If you want to explore this area, let us know as this requires the use of a special virtual machine that has to be temporarily set up on your site in order to get us access to the data.

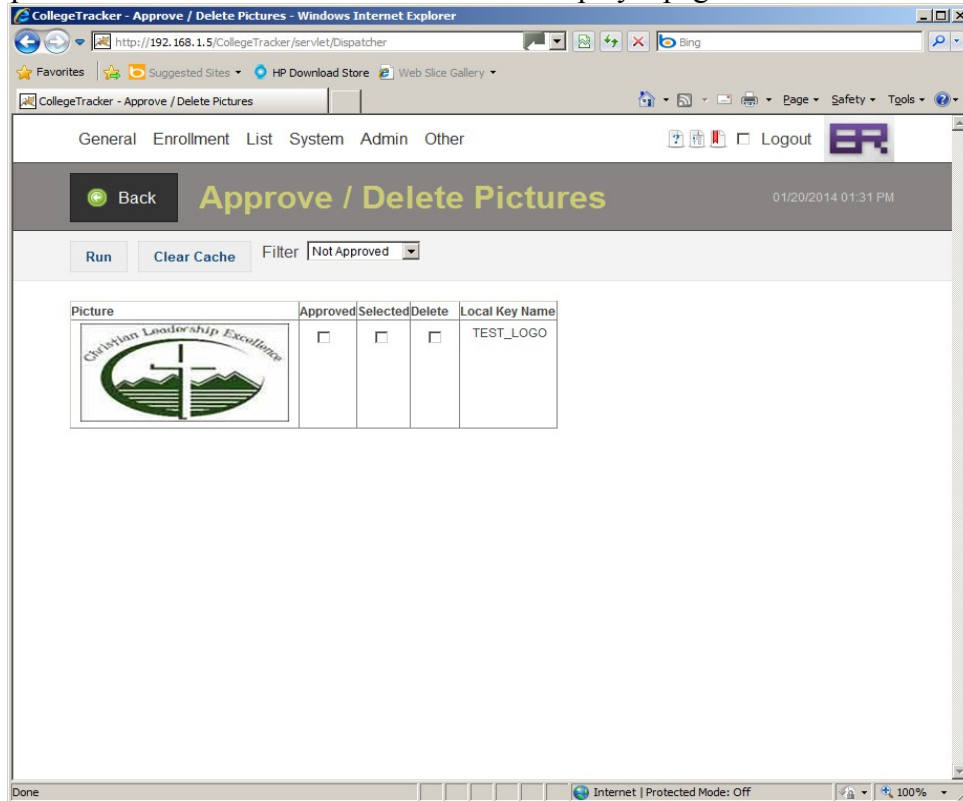
Modify the College Logo

Assuming you have a school logo, try the following. First, locate your school logo and make sure you can get to it using Windows Explorer. Assuming you can, return to Setup Home and click on School Setup and then click the “Update Logo” button. You will see a page which will look like the following:



Click the Browse button and navigate to where your school logo is located and select it. The logo will be scaled to 199 pixels wide and as high as it needs to be – the logo will fit the page best if it is 80 pixels high although some variation will be OK. Once the new logo is selected, click on the Put button. As a security precaution, most pictures are not automatically displayed, instead, an approval process is in place which requires an administrator or other privileged user to approve the change. Because of this, the logo will not immediately take effect because it hasn't yet been approved.

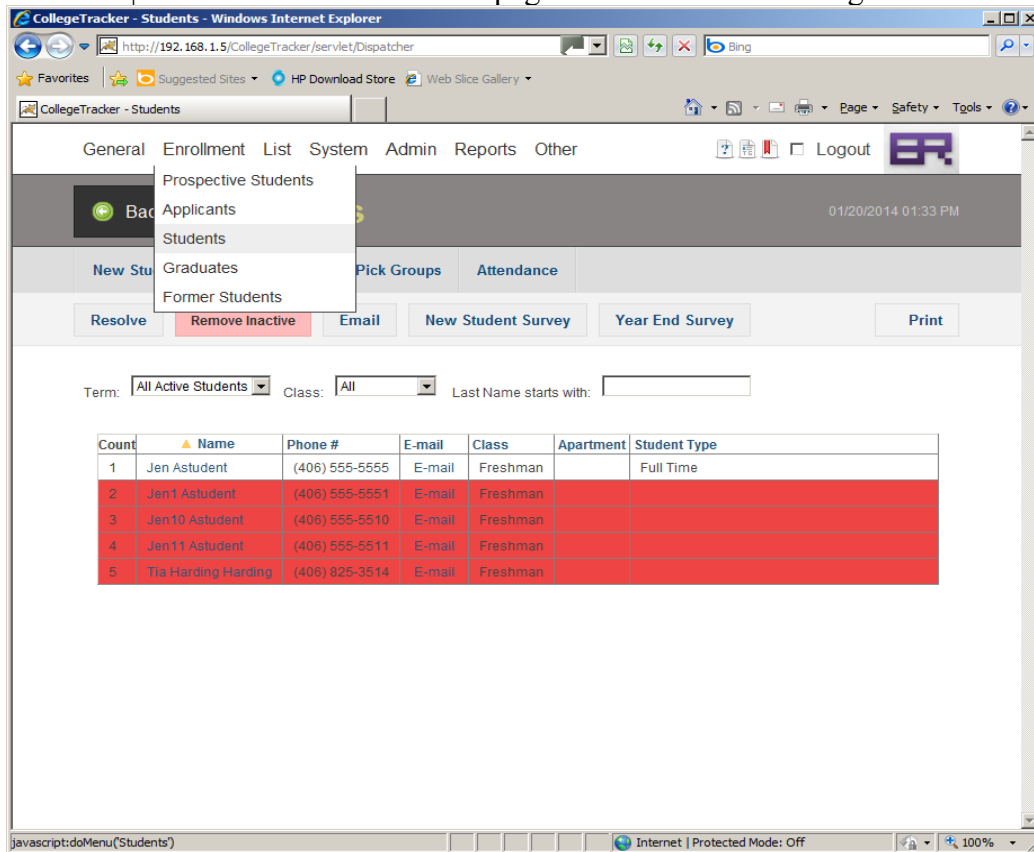
Return to Setup Home and click on Pictures which will display a page similar to the following:



Click on the “Approved” and “Selected” check boxes next to the picture. Then, click the Run button. The page will refresh and there will be no unapproved pictures but the new logo will still not be displayed. Using the Filter, select “Approved”. You will see two pictures with the local key name of TEST_LOGO. Uncheck the Approved box next to the Montana Bible College Logo and click the Run button. Then click the Clear Cache Button. Your college logo should now be displayed instead of the old logo. This Clear Cache button can be used whenever a picture has been updated and approved but isn't being displayed – clicking this button will force the program to rebuild its list of known pictures which it caches to improve performance. Selecting “All” in the filter will display all pictures known to the system. You could use this to remove the MBC logo by selecting the checkbox in the Delete column next to the MBC logo and clicking the Run button. This will permanently remove this picture from your system.

Viewing Student Information

Click on Enrollment | Students. You should see a page similar to the following.



This page displays a list of all students for which the “Active” check box is clicked (next screen print). The students highlighted in red are students which are not registered for classes in the current semester. Click on Jen Astudent and you should see a page like the following:

This page displays information about this particular student – since this data was just imported, very little of the data is filled in. The “Starting Term” is automatically calculated based on when the student took their first class with the college. The student's class is calculated based on the data set up in the School Setup. The buttons on this page allow various activities to be performed for this student such as registering for classes, displaying their transcript, or adding/viewing their transfers. Go ahead and explore this page so you are familiar with it. A student can log in and see this page. During the enrollment period, they can preregister for classes and are also capable of viewing their class schedule. Most of the rest of the buttons are hidden from a student.

Faculty and classes behave in a similar fashion and can also be found in the List menu.

CollegeTracker - Student Information for Jen Astudent - Windows Internet Explorer

http://192.168.1.5/CollegeTracker/servlet/Dispatcher

General Enrollment List System Admin Other

Logout

Student Information for Jen Astudent

01/20/2014 01:34 PM

Pre-Register Register Class Schedule Medical Transfers Program Audit Transcript Holds

Finances

Save Delete Update Picture Assignments

General Information

Emergency Contact

Address

Scholastic

Entrance Information

Program History

Graduation

Exit Interview

Other Institutions

Evaluations

Preferred Name

Name (First, Middle, Last, Sfx) * Jen Astudent

Married? ☐

Former Name / Maiden name

SSN

Student ID

Login ID Jen.Astudent@ABC

Email Address Jen.Astudent@yahoo.co E-mail Don't Email ☐

Birthday 02/06/1987 Gender Female

Ethnicity

Phone Number (406) 555-5555

Add a Calendar Entry

Click on General | Calendar. This will display an event calendar page which will be divided into three sections. We are going to add a new event scheduled for tomorrow. In the upper left side of the page, you should see a monthly calendar, with the current date (according the virtual machine) selected in yellow. No other dates should have any special marking – the page should look similar to this.

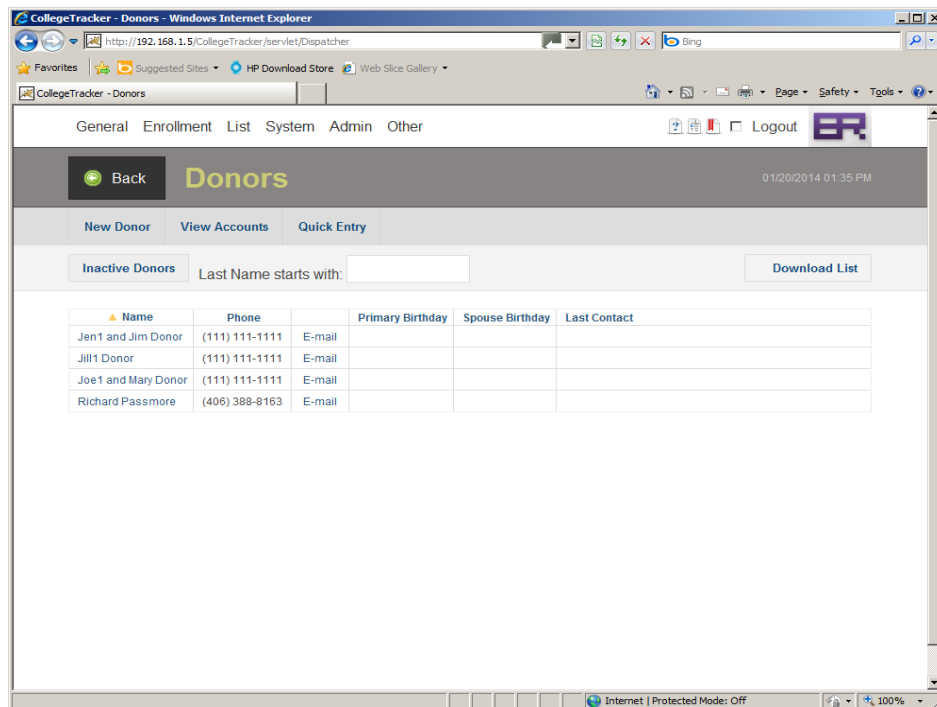
The screenshot shows a web browser window titled "CollegeTracker - Edit Calendar Information - Windows Internet Explorer". The address bar shows the URL: `http://192.168.1.5/CollegeTracker/servlet/Dispatcher?action=Display&destination=Calendar`. The page has a header with the title "Edit Calendar Information" and a timestamp "01/20/2014 01:34 PM". Below the header, there are buttons for "Save", "Delete", "Clear", "Go to:" (with a text input field), "Go", "Spreadsheet Export", and "Printable Form". The main content area has three radio buttons for "Day View", "Month View" (selected), and "Year View". There is a "Filter On:" dropdown menu. Below these, there is a calendar for "January 2014" with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (01 to 31). The date "20" is highlighted in yellow. To the right of the calendar is a text input field labeled "Events for January 2014". Below the calendar, there are several form fields: "Date" (with a date picker showing "01/20/2014" and a "To" field with a date picker and "(optional)" text), "Event Repeats every:" (with a dropdown menu), "Event Type" (with a dropdown menu), "Assigned To:" (with a dropdown menu), "Backup:" (with a dropdown menu), "Display a reminder?" (with a checkbox), "Event Description" (with a text area), "Start Time" (with a time picker), "End Time" (with a time picker), and "Notes" (with a text area). The browser's status bar at the bottom shows "Internet | Protected Mode: Off" and a zoom level of "100%".

Select tomorrow's date from the list (in this example, that'd be January 21st). The only change to the page should be the Date field near the middle of the page and the "Events for..." line near the top. Select the event type you entered in the Reference Data (probably your new reference entry – Full Board Meeting). Enter whatever you'd like for Event Description and Notes. Start and End time can be left blank if the event will last all day, otherwise, enter the time as either standard time (like 09:00 AM) or in military time (13:00) and then click the Save button. The event should now appear in the "Events for..." list. Feel free to add any events you'd like – remember that the types are entered using the Setup Home page and clicking Reference Data link. Clicking on the event in the "Events for..." list will display it in the edit area. Also, you can click on the day, month, and year views to see all events. Colors can also be assigned to event types – view the help system on this page (click on the Help menu item) to see how to do this.

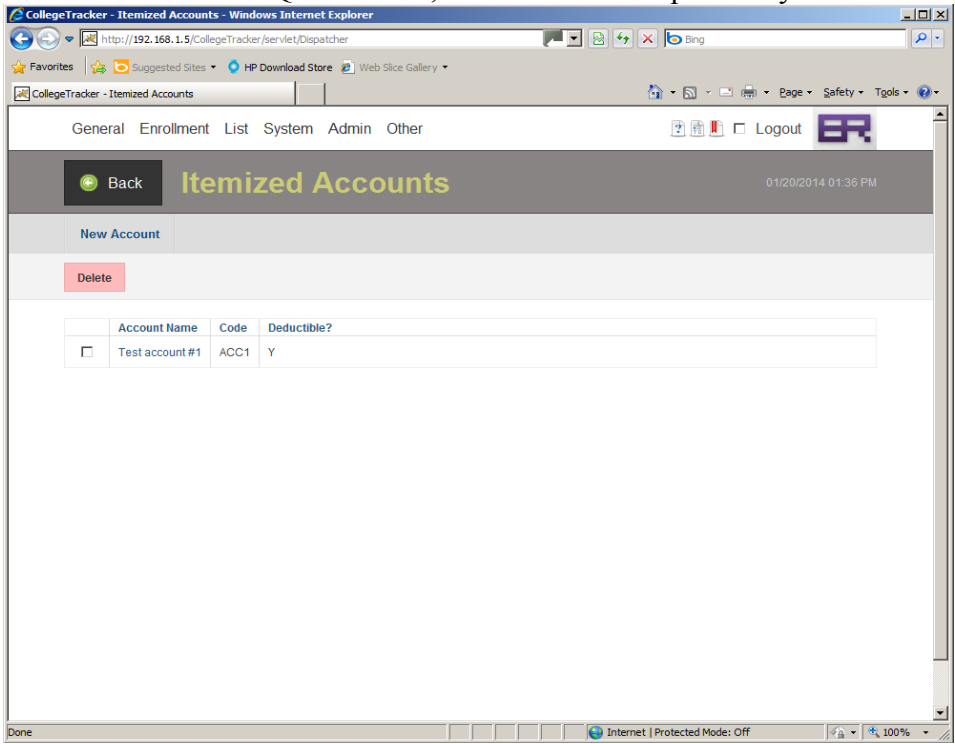
Editing / Adding Donors

Basic donor tracking is included in the package. To begin using these features, click on Other | Donors, you should see a page similar to the following. As mentioned, this is the first area of the program we developed, it is also the least used. :-)

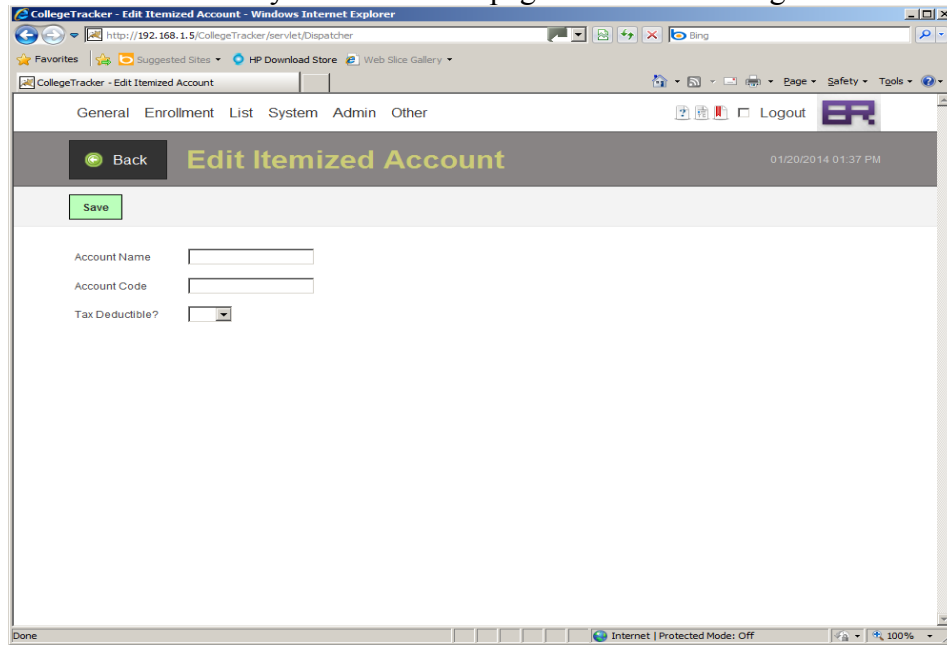
The reason for this is, it's easier to track this information within a program such as QuickBooks than in here. The pages are still part of the system in case you are tracking this information manually today. Eventually, this system will either be fully integrated with QuickBooks (which we can do now) or will be removed.



Click on the View Accounts Button. This will take you to an empty page which would list all accounts to which a donor can contribute. In QuickBooks, these would be replaced by “Items”.



Click the New Account button and you should see a page like the following:



The screenshot shows a web browser window titled "CollegeTracker - Edit Itemized Account - Windows Internet Explorer". The address bar shows the URL "http://192.168.1.5/CollegeTracker/servlet/Dispatcher". The browser's Favorites bar includes "CollegeTracker - Edit Itemized Account". The page has a navigation menu with "General", "Enrollment", "List", "System", "Admin", and "Other". A "Logout" button is visible. The main heading is "Edit Itemized Account" with a timestamp "01/20/2014 01:37 PM". A green "Save" button is at the top left. Below it are three input fields: "Account Name" (text box), "Account Code" (text box), and "Tax Deductible?" (dropdown menu). The status bar at the bottom shows "Done" and "Internet | Protected Mode: Off".

Enter an account name and code as well as whether this account would be considered tax deductible. Pressing save will return you to the list of accounts. Enter as many of these as you'd like. When finished, you can use the "Go Back" icon to return to the Donors page.

Once you return to the Donors page, click on New Donor which will look like the following:

The screenshot shows a web browser window titled "CollegeTracker - Donor Information". The address bar shows the URL "http://192.168.1.5/CollegeTracker/servlet/Dispatcher". The browser's Favorites bar includes "CollegeTracker - Donor Information". The page has a navigation menu with "General", "Enrollment", "List", "System", "Admin", and "Other". A "Logout" link is visible. The main heading is "Donor Information" with a timestamp "01/20/2014 01:37 PM". Below the heading are buttons for "Display Donations", "Update Picture", "Save", "Delete", and "Create Contact". The "General" tab is selected, showing a form for donor information. The "Donor Type" dropdown is set to "Individual". The form includes fields for Name, Birthday, Spouse Name, Spouse Birthday, Company Name, Contact Name, E-Mail, and Inactive Donor? (checkbox). There are also checkboxes for "Deceased?". A sidebar on the left contains links for "Address", "Phones", and "Notes". The status bar at the bottom indicates "Internet | Protected Mode: Off" and "100%".

CollegeTracker - Donor Information - Windows Internet Explorer

http://192.168.1.5/CollegeTracker/servlet/Dispatcher

CollegeTracker - Donor Information

General Enrollment List System Admin Other

Logout

Back Donor Information 01/20/2014 01:37 PM

Display Donations Update Picture

Save Delete Create Contact

General Donor Type Individual

Name Deceased? ☐

Birthday

Spouse Name Deceased? ☐

Spouse Birthday

Company Name

Contact Name

E-Mail

Inactive Donor? ☐

Address Phones Notes

Downloading picture http://192.168.1.5/CollegeTracker/servlet/PictureDispatch?destination=pic

Internet | Protected Mode: Off 100%

Enter whatever information you would like for this donor – make sure to enter at least a name. When finished, press the Save button.

Next, click on the Display Donations button, you will see a new page which will look like this:

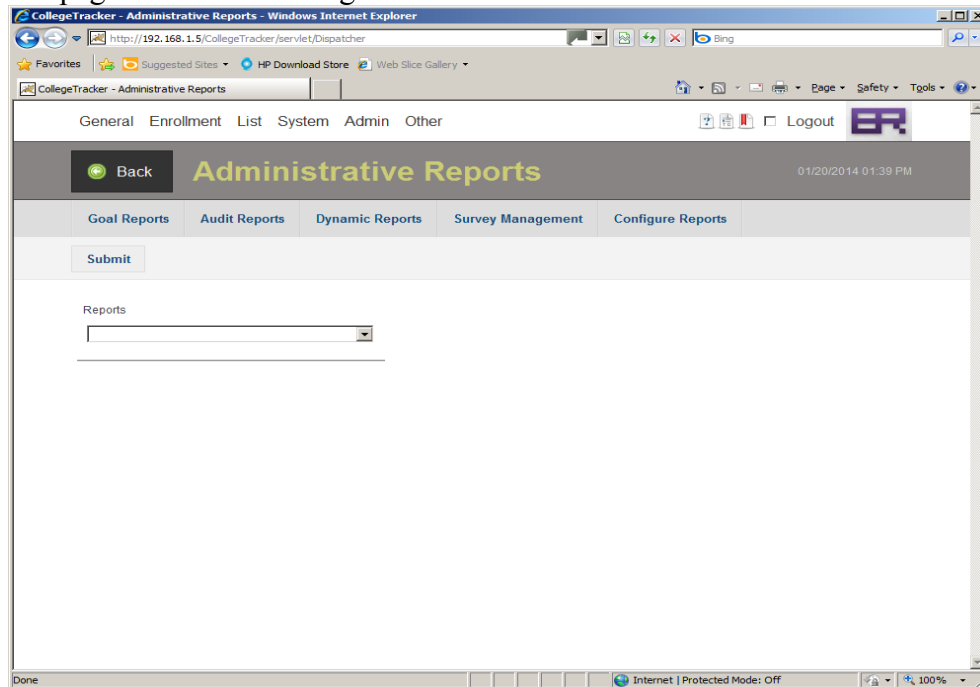
The screenshot shows a web browser window titled "CollegeTracker - Donations for Jen1 Donor". The address bar shows the URL "http://192.168.1.5/CollegeTracker/servlet/Dispatcher". The browser's Favorites bar includes "CollegeTracker - Donations for Jen1 Donor". The page has a navigation menu with "General", "Enrollment", "List", "System", "Admin", and "Other". A "Logout" button and a logo are in the top right. The main header area contains a "Back" button, the title "Donations for Jen1 Donor", and a timestamp "01/20/2014 01:38 PM". Below the header, there are "Add" and "Clear" buttons on the left, and a "Printable Receipt" button on the right. The main content area contains a form with the following fields: "Contrib Date" (text input), "Amount" (text input), "Contribution Type" (dropdown menu), "Number" (text input), "Item Description" (text input), and "Value" (text input). At the bottom, there is a table with two columns: "Account" and "Amount". The table has one row with the text "Test account #1" in the "Account" column and an empty "Amount" column.

Account	Amount
Test account #1	

This page displays a list of past donations (empty in this case). It also allows you to enter a new contribution and split that contribution between the accounts added in the Itemized accounts page. Enter whatever you would like here and press the Add button. One limitation worth noting – only one contribution per Donor per day is currently allowed. Other than during a demo or test environment, this is probably adequate. There are also buttons which allow a printable receipt or year end receipt to be printed. There are a few different printable forms built into the system including the ability to define your own using a language called XSL-FO. To display a receipt, select a contribution and then click the Printable Receipt button.

Printing Reports

The program provides over 60 reports to help a college track their progress on goals or to find out how many credits students are taking, etc. To access the list of reports and graphs, click on Admin | Reports. You should see a page like the following:



Click on the drop-down to see the available reports. When a report or graph is selected, options specific to that report or graph are displayed.

The screenshot shows a web browser window titled "CollegeTracker - Administrative Reports - Windows Internet Explorer". The address bar shows the URL "http://192.168.1.5/CollegeTracker/servlet/Dispatcher". The browser's toolbar includes buttons for Back, Forward, Stop, and Reload, along with a search bar and a "Bing" search engine link. Below the browser window, the web application interface is visible. At the top, there is a navigation bar with links for "General", "Enrollment", "List", "System", "Admin", and "Other". A "Logout" button and a logo are also present. The main content area has a header with a "Back" button and the title "Administrative Reports" in large yellow text. Below this, there is a horizontal menu with tabs for "Goal Reports", "Audit Reports", "Dynamic Reports", "Survey Management", and "Configure Reports". A "Submit" button is located below the menu. The main content area is titled "Reports" and features a drop-down menu currently showing "Student Class List". Below the drop-down, there is a "Reporting period" section with a "Report Year" text input field and a "Term" drop-down menu currently set to "Current". The browser's status bar at the bottom indicates "Internet | Protected Mode: Off" and a zoom level of "100%".

The only requirement to use the reporting feature is having the Acrobat Reader Plugin installed on your computer's browser or be able to download the report to your computer. More reports are regularly added so, feel free to ask us about any reports that you don't see that would be needed by your College – it's possible we have them but named them differently than you expect or, that we don't have them currently. In this case, we can usually put a report together in a week or so providing CollegeTracker currently collects the information needed for the report.

From the Administrative Reports page, click on the Configure Reports button. This page allows you to customize the reports used at your college to fit your needs. Many of the reports have variants for you to choose between. We can also add more variants if the ones available do not meet your needs.

CollegeTracker - Configure Reporting Options - Windows Internet Explorer

http://192.168.1.5/CollegeTracker/servlet/Dispatcher

CollegeTracker - Configure Reporting Options

General Enrollment List System Admin Other

Back **Configure Reporting Options** 01/20/2014 01:41 PM

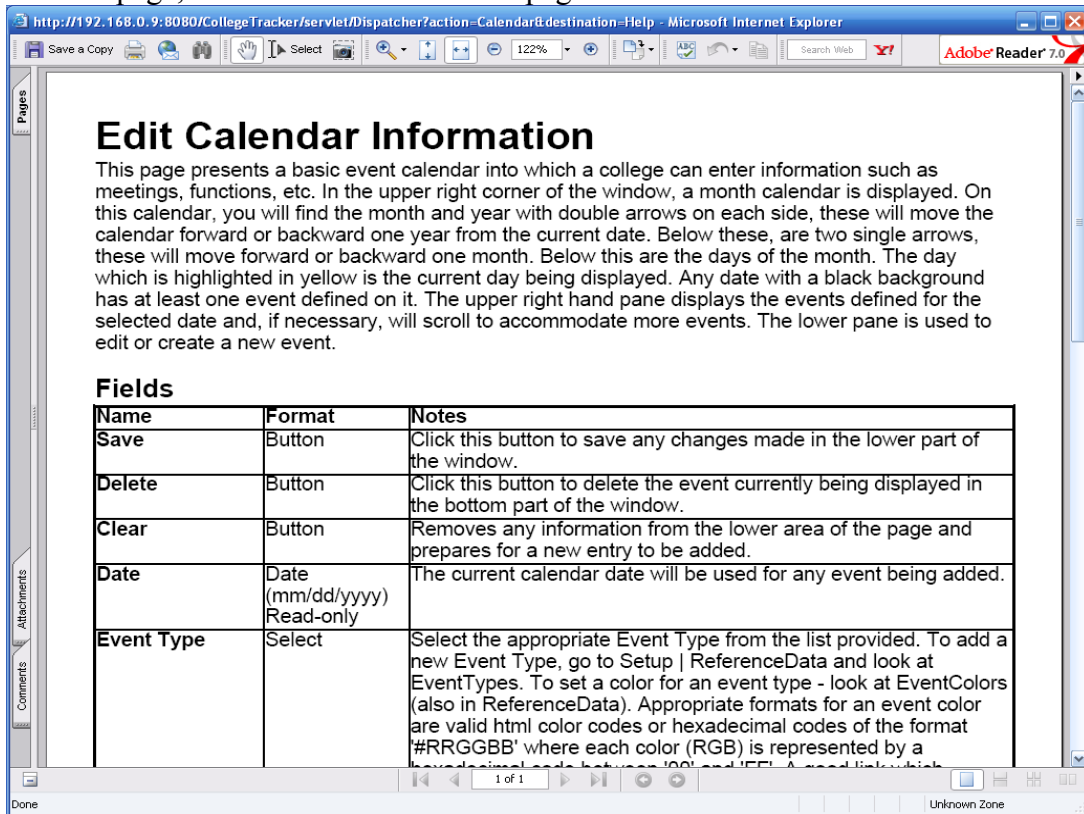
Save

Report Name	Start	End	Report Option
Academic Probation Report	No	Yes	Default
Academic Problem Letters	No	No	Default
All Student Assignments Report	No	No	Default
All Student Transcripts	No	No	Default
Alumni Directory Report	No	No	Default
Applicant Accreditation	No	Yes	Default
Application for Admission	No	No	Pretty Application Form
Assignment List Report	No	Yes	Default
Attendance Report	No	No	Default
Birthday Report	No	Yes	Default
Blank Attendance Report	No	No	Default
Book Supplier Report	No	No	Default

Done Internet | Protected Mode: Off 100%

Help System

By clicking on the Help menu item from any page, you will see a new window pop up which will contain help for that page. Each help page contains a title with the same name as the page, a general description of the page, and a list of fields on that page as well as what each field does.



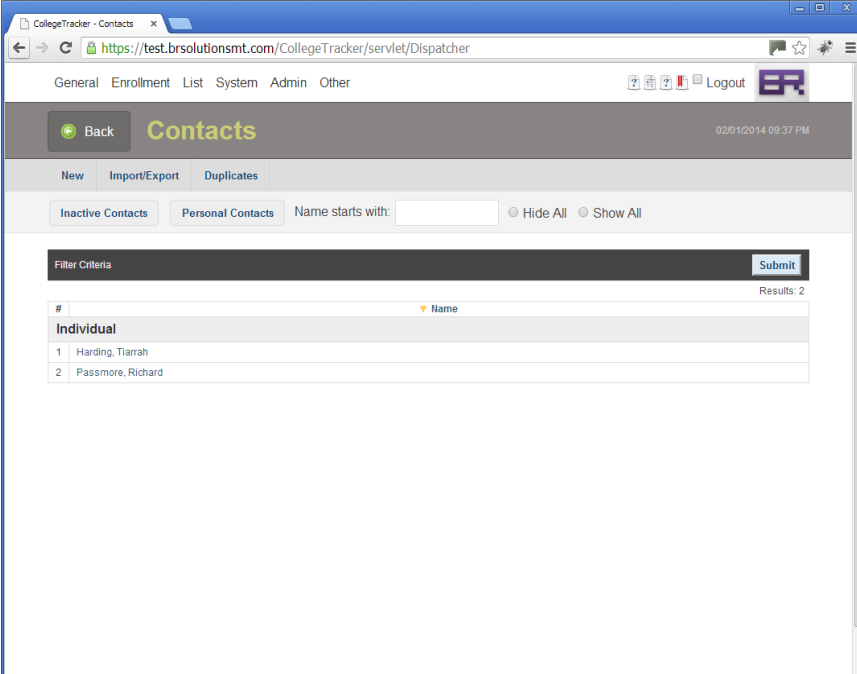
The screenshot shows a Microsoft Internet Explorer window with the address bar displaying `http://192.168.0.9:8080/CollegeTracker/servlet/Dispatcher?action=Calendar&destination=Help`. The page title is "Edit Calendar Information". The main content area contains a paragraph describing the calendar functionality and a table titled "Fields". The table has three columns: "Name", "Format", and "Notes". The "Fields" table lists the following fields:

Name	Format	Notes
Save	Button	Click this button to save any changes made in the lower part of the window.
Delete	Button	Click this button to delete the event currently being displayed in the bottom part of the window.
Clear	Button	Removes any information from the lower area of the page and prepares for a new entry to be added.
Date	Date (mm/dd/yyyy) Read-only	The current calendar date will be used for any event being added.
Event Type	Select	Select the appropriate Event Type from the list provided. To add a new Event Type, go to Setup ReferenceData and look at EventTypes. To set a color for an event type - look at EventColors (also in ReferenceData). Appropriate formats for an event color are valid html color codes or hexadecimal codes of the format '#RRGGBB' where each color (RGB) is represented by a hexadecimal code between '00' and 'FF'. A good link to visit is http://www.w3schools.com/html/html_color_codes.asp .

The browser window also shows a sidebar with "Pages", "Attachments", and "Comments" tabs. The status bar at the bottom indicates "Done" and "Unknown Zone".

Working with Contacts

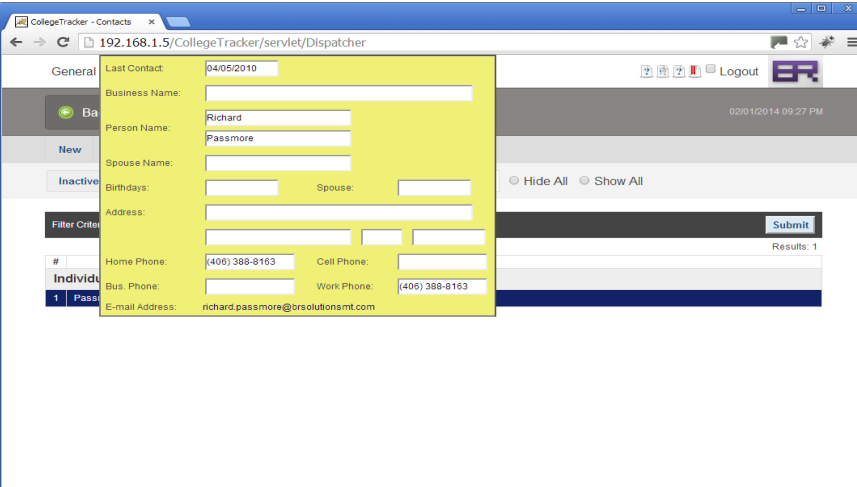
College Tracker also has a contact management system built into it. There are two ways to access contacts from the Administrative Home page, the first is to click on the Contacts button which will take you directly to the Contacts list page



The screenshot shows the 'CollegeTracker - Contacts' web application. The browser address bar displays 'https://test.brsolutionsmt.com/CollegeTracker/servlet/Dispatcher'. The navigation menu includes 'General', 'Enrollment', 'List', 'System', 'Admin', and 'Other'. The main header features a 'Back' button, the title 'Contacts', and a timestamp '02/01/2014 09:37 PM'. Below the header, there are tabs for 'New', 'Import/Export', and 'Duplicates'. A filter section includes 'Inactive Contacts', 'Personal Contacts', a 'Name starts with:' input field, and radio buttons for 'Hide All' and 'Show All'. A 'Filter Criteria' box with a 'Submit' button is also present. The results table shows 2 results:

#	Name
1	Harding, Tiarrah
2	Passmore, Richard

From this page, you can click on a row (not the name of the person), and you will get an instant look at the primary contact data for the individual or business.



The screenshot shows the 'CollegeTracker - Contacts' web application with the contact details for Richard Passmore displayed. The browser address bar displays '192.168.1.5/CollegeTracker/servlet/Dispatcher'. The navigation menu includes 'General', 'Enrollment', 'List', 'System', 'Admin', and 'Other'. The main header features a 'Back' button, the title 'Contacts', and a timestamp '02/01/2014 09:27 PM'. Below the header, there are tabs for 'New', 'Import/Export', and 'Duplicates'. A filter section includes 'Inactive Contacts', 'Personal Contacts', a 'Name starts with:' input field, and radio buttons for 'Hide All' and 'Show All'. A 'Filter Criteria' box with a 'Submit' button is also present. The results table shows 1 result:

#	Name
1	Passmore, Richard

The contact details for Richard Passmore are displayed in a yellow box:

- Last Contact: 04/05/2010
- Business Name: [Empty]
- Person Name: Richard
- Spouse Name: [Empty]
- Birthdays: [Empty] Spouse: [Empty]
- Address: [Empty]
- Home Phone: (406) 388-8163 Cell Phone: [Empty]
- Bus. Phone: [Empty] Work Phone: (406) 388-8163
- E-mail Address: richard.passmore@brsolutionsmt.com

You can also click on the name and be taken to a page which will have all information about the contact.

The contact information has been divided across 6 tabs to make finding the information of interest a little easier. The top 3 tabs divide up the most commonly used contact information, the next two are specific to CollegeTracker so I'll describe what they do..

The screenshot shows a web browser window titled "CollegeTracker - Edit Contact". The address bar shows the URL "192.168.1.5/CollegeTracker/servlet/Dispatcher". The page has a navigation bar with tabs: "General", "Enrollment", "List", "System", "Admin", and "Other". A "Logout" link and a logo are also present. Below the navigation bar, there's a header section with a "Back" button, the title "Edit Contact Information: Richard Passmore", and a timestamp "02/01/2014 09:28 PM".

Below the header, there are buttons for "Reset", "Update Picture", "Save", "Delete Contact", "Add", and "Delete".

The main content area is titled "Change Contact" and includes a search bar for "Last Name / Company" with a "Go" button. Below this, there's a "Contact Information" section with a sidebar containing tabs: "Contact Information", "Address", "Phone Numbers", "Connections", "Relationships", and "Notes".

The "Contact Information" tab is active, showing the following fields:

- Contact Type:** Individual (dropdown)
- Name:** Mr (dropdown), Richard (text), Passmore (text), and a "Deceased?" checkbox.
- Birthdate:** (text field)
- Spouse Name:** (dropdown), (text), (dropdown), (text), and a "Deceased?" checkbox.
- Spouse Birthdate:** (text field)
- E-Mail:** richard.passmore@brsolutionsmt.com (text field) and an "E-mail" label.
- Home #:** (406) 388-8163 (text field)
- Cell #:** (text field)
- Work #:** (406) 388-8163 (text field)
- Fax #:** (text field)
- Record out of date?:** (checkbox)
- Web Site:** (text field)

On the left side of the "Contact Information" section, there is a photo of a man with glasses and a green shirt.

The Connections tab defines the ways this particular person or entity is tied to other records within CollegeTracker, for instance, if this person were a student, you would be able to get to their student record from the Connections tab. Also, if this particular person belongs to particular groups like “Receives newsletter”, you can select those on this page as well. These can then be used to filter the information so you can send e-mails or generate a mail merge list using only those interested in receiving the information. One thing that may be of interest to a user of this system is that the Contact, Student, Donor, Volunteer, and Admin records automatically synchronize with one another... As long as the records are tied together on the Connections tab, a change to name, address, or phone number on one will be reflected within a few seconds in all the rest. So, for instance, changing this student's Address here will automatically be transferred to their student record or vice versa. Also on the Edit Contact page are an Add and Delete button (after Delete Contact), these allow you to add/remove the individual or organization into/from your personal contact list which then allows you to get to them faster in the future.

CollegeTracker - Edit Contact X

192.168.1.5/CollegeTracker/servlet/Dispatcher

General Enrollment List System Admin Other Logout

Back **Edit Contact Information: Tiarrah Harding** 02/01/2014 08:56 PM

Reset Update Picture

Save Delete Contact Add Delete

Change Contact Last Name / Company Go

Contact Information

Put a checkbox next to each group to which this contact "belongs".

☐ Board of Directors ☐ Do not send newsletter ☐ Donor

☐ E-mail Newsletter ☐ Interest Card Returned ☐ Newsletter returned

☐ Receives Newsletter ☐ YBC Alumni

Connections

Connections to records within the rest of the system.

Volunteer Record

Donor Record

Student Record

Admin Record

The Relationships tab describes how the current individual is connected with other contacts within the system. So, for instance, if you have a contact for a parent as well as their children who are (or were) students at the college, you could specify those relationships here. This will then allow immediate access from one to the other. This makes it so you have an additional way of tracking emergency contact information if you wish to use it. Currently, no relationships have been defined within this test database but, feel free to add contacts and then connect them by clicking the add button on this page.

CollegeTracker - Edit Contact: x

192.168.1.5/CollegeTracker/servlet/Dispatcher

General Enrollment List System Admin Other

Logout

Back Edit Contact Information: Tiarrah Harding 02/01/2014 09:05 PM

Reset Update Picture

Save Delete Contact Add Delete

Change Contact Last Name / Company Go

Contact Information

Address

Phone Numbers

Connections

Relationships

Notes

Relationships define "associated with" relationships with other contacts. These are either defined directly for this contact or indirectly by another contact. The indirect relationships will be shown in the list without a checkbox. To delete the association, follow the link.

Add Delete

Select Name Relationship

☐ Richard Passmore

Child
Employs
Owner
Parent
Pastor
Sibling

By the way, the relationships can be added or removed any time you wish via reference data. Normally, once you start using a relationship type, you shouldn't remove it.

CollegeTracker - Reference: x

192.168.1.5/CollegeTracker/servlet/Dispatcher

General Enrollment List System Admin Other

Logout

Back Reference Data 02/01/2014 09:05 PM

New Item

Delete Items Reset Cache

Select a different group: Contact Relationships

Select	Code	Value
<input type="checkbox"/>	child	Child
<input type="checkbox"/>	employ	Employs
<input type="checkbox"/>	owns	Owner
<input type="checkbox"/>	parent	Parent
<input type="checkbox"/>	pastor	Pastor
<input type="checkbox"/>	sibilin	Sibling

The other way to access contact information is from the “Find Contact” selection on the Administrative home page, clicking this will bring up a blank “Edit Contact Information” page. You simply start typing the last name of the contact you want to find and then choose the right name from the list once the list is small enough. Once the name is chosen, clicking the “Go” button will pull up that contact's information.

CollegeTracker - Edit Contact x

192.168.1.5/CollegeTracker/servlet/Dispatcher

General Enrollment List System Admin Other

Logout

02/01/2014 09:11 PM

Back

Edit Contact Information:

All Contacts

Save

Change Contact Last Name / Company P Go

Contact Information

Address

Phone Numbers

Connections

Contact

Passmore, Richard,

Home #

Cell #

Fax #:

Record out of date? ☐

Web Site

Another feature of the Contacts area is the ability to filter the results for mailing lists or whatever other purposes you can think of. To do this, go back to the Contacts page. Click on the “Filter Criteria” bar and choose your filter conditions. For instance, here, I am going to filter for only people with a Last Name of “Passmore”. On the second print screen, you can see the groups that I pointed out before. You can select the groups you want to see. These can be used in conjunction with Individual Filter requirements or Organization Filter requirements to give you just the right combination of people/organizations. Once your filter has been set, click the Submit button on the Filter Criteria bar to apply these filter settings.

CollegeTracker - Contacts x
192.168.1.5/CollegeTracker/servlet/Dispatcher

Back **Contacts** 02/01/2014 09:30 PM

New Import/Export Duplicates

Inactive Contacts Personal Contacts Name starts with: Hide All Show All

Filter Criteria Submit

Only display "out of date" entries? ☐

☒ Set Individual filter requirements?

Personal information - what personal information needs to be present?

Title: First Name: Last Name: Passmore City: State: Zip:

☐ Set Organization filter requirements?

☐ Set group filter requirements?

☐ Set Advanced filter information?

Results: 1

#	Name
Individual	
1	Passmore, Richard

CollegeTracker - Contacts x
192.168.1.5/CollegeTracker/servlet/Dispatcher

General Enrollment List System Admin Other Logout

Back **Contacts** 02/01/2014 09:14 PM

New Import/Export Duplicates

Inactive Contacts Personal Contacts Name starts with: Hide All Show All

Filter Criteria Submit

Only display "out of date" entries? ☐

☐ Set Individual filter requirements?

☐ Set Organization filter requirements?

☒ Set group filter requirements?

Group Memberships - what group memberships do these contacts need to have?

☐ Board of Directors ☐ Do not send newsletter ☐ Donor ☐ E-mail Newsletter

☐ Interest Card Returned ☐ Newsletter returned ☐ Receives Newsletter ☐ YBC Alumni

☐ Set Advanced filter information?

Results: 2

#	Name
Individual	
1	Passmore, Richard
2	Harding, Tiarrah

Once the filter is applied, it remains in effect for your entire session (until you change it). This means, you can now access the Send Mail page within the application and either send mail to the selected contacts or grab the e-mail addresses which will allow you to do more sophisticated e-mailing. To do this, click the “Contacts” checkbox and then click the display e-mail addresses check box. This is very useful because some e-mail points of presence do not allow e-mail to more than 30 people at a time.

CollegeTracker - Send Corre: x

192.168.1.5/CollegeTracker/servlet/Dispatcher

[Send](#) [Back to top](#)

On Campus ☐

Off Campus ☐

Faculty ☐ ☐

Staff ☐ ☐

Former Students ☐ All

Prospective Students ☐ All

Applicants ☐

Contacts ☒

Student Groups

Group Name	E-mail	Pagers
Test Group	<input type="checkbox"/>	<input type="checkbox"/>

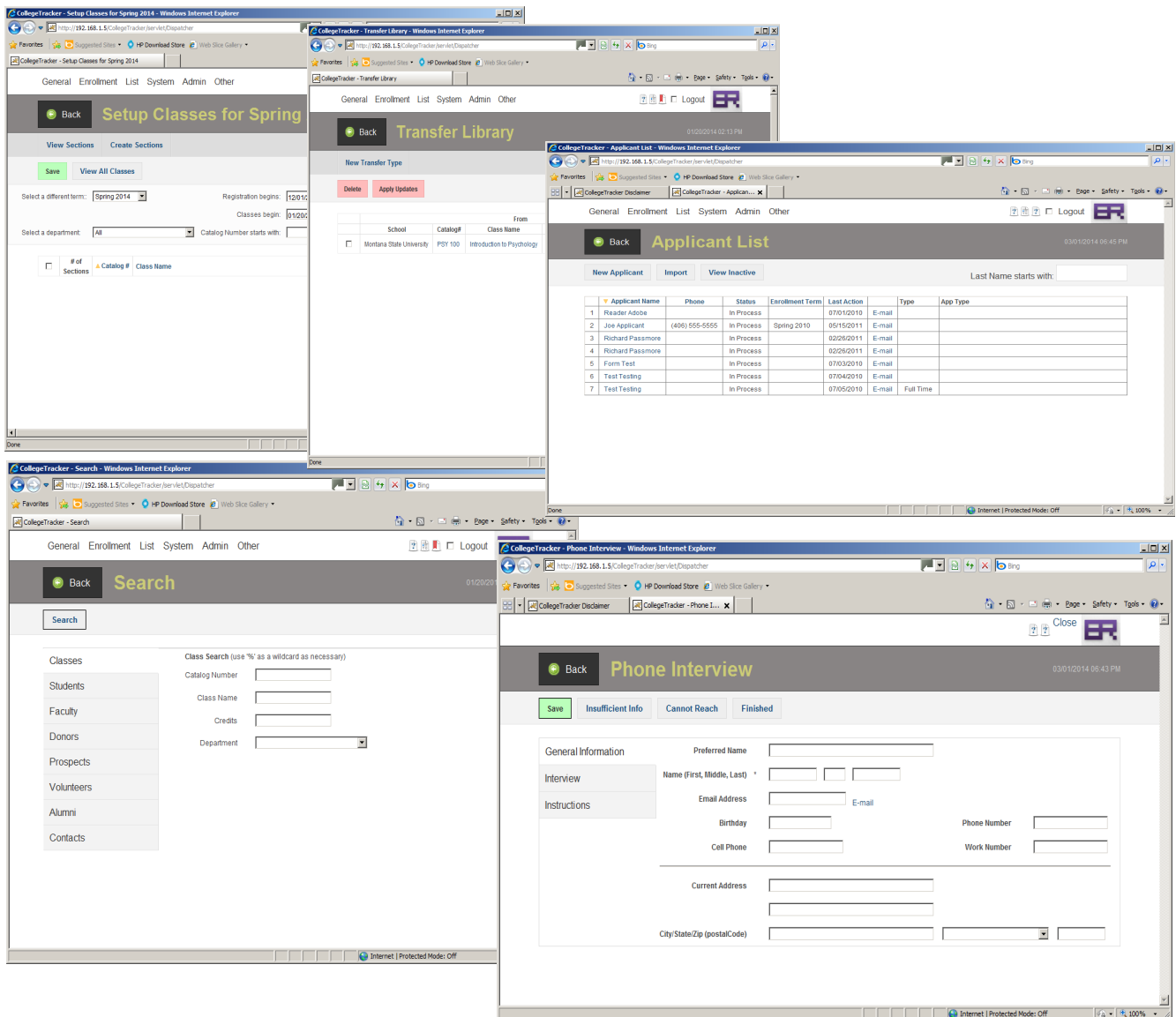
☒ Display Email Addresses

NOTE: When sending e-mail to the list of addresses provided here, you may be limited on the number of e-mail address you can include on any one e-mail. Depending on your ISP, the limit may be as few as 25 addresses or less. If this happens, I would suggest sending multiple e-mails using 25 or fewer of these addresses per e-mail.

Addresses:

A lot more to explore

Thank you for walking through this Step by Step guide. There are many other pages which could be explored but, this gives you an idea of the system. Other areas worth exploring include our Transfer Library, Term Setup, Goals, and Search. If you have any questions about these areas or anything else you find (or don't find) in the application, please contact us by e-mail (contact@brsolutionsmt.com) or by phone (406-388-8163). If you choose to call, be aware that there are times when I have other matters to attend to and leave a message letting me know who you are, where you are calling from, and how I can best contact you and you will hear back from me as soon as I can manage it.



Appendix A – Menu Items

Here is a hierarchy of the menus and what the options present are for:

Main Menu Item	Sub Menu Item	Purpose
General		Clicking on this link will return you to the home page.
General	Search	Allows searches over the major categories of people and classes.
General	Calendar	Allows an event calendar to be created and maintained.
General	Documentation	Lets the user access online documentation specific to CollegeTracker
General	Send Mail	Allows e-mails to be sent to individuals or groups known to CollegeTracker – such as a filtered set of contacts, all students, or all teachers.
Enrollment	Prospective Students	Displays a list of people that are interested in attending your college
Enrollment	Applicants	Displays a list of applicants and allows the application process to be monitored.
Enrollment	Students	Displays a list of the students at the school. The default list shows all “active” students but, you can also view students for a particular term/semester.
Enrollment	Graduates	Displays a list of all students who are not currently students that have received a degree or certificate from your college.
Enrollment	Former Students	Displays students that are no longer active that have taken some classes at your college but did not receive a degree/certificate.
List	Faculty	Displays all the teachers at the college. Not all teachers are necessarily teaching at any particular point in time.
List	Classes	Displays the list of classes for a particular term/semester. The user can switch to a different semester by changing the select at the top of the page.
List	Staff	Displays a list of all staff positions (other than teachers)
System	Challenges	Allows the user to enter answers to a series of questions which will be used if they forget their password (or need to reset their password).
Admin	Reports	Allows the user to display or configure the reporting capabilities of the system.
Admin	Report Defect	Used to report a problem to the CollegeTracker maintenance team.
Admin	Users	Displays all users and allows editing things such as resetting their password, deactivating them, and changing their log on name.
Admin	Password	Allows the current user to change their password.
Other	Volunteers	Display a list of volunteers at the college and record their role and the time they have spent
Other	Donors	Display a list of donors to the college and enter any contributions they have made. This is mostly useful if the college isn't tracking donations through some accounting program.
Other	Contacts	Shows the contacts known to the college, allows new contacts to be added, also allows filtering to make it so you only see the businesses/individuals/churches of interest to you.
Other	Phone Interview	The Phone Interview area uses an XML based interview form and allows for people to call a list of former students to gather information about what has happened to them since college.