

3C's – Comments, Checklists, Communications

Adding Personal Comments

Description

You can enter and track comments about individuals and organizations. You can review all comments about an individual or organization or all comments entered by a specific individual. Because personal comments are subjective and often confidential, carefully analyze your university's needs and requirements for entering and tracking comments. You should also be familiar with administrative functions and 3C group security before setting up or creating comments in your system.

In most cases it will be easier, with the appropriate security access, to click the Create Comments button while on a page in a functional area about that individual or organization to attach or review comments to an individual's or an organization's record

NOTE: 3C comments are permanent and cannot be deleted from a person's record without divine intervention. Be careful.

Process Steps

Navigation:

Method A - attaching a comment while on prospect and applicant pages:

Student Recruiting > Maintain Prospects > Add/Update Prospects

Prospect Career Data > 

Student Recruiting > Maintain Prospects > Add/Update Prospects


Prospect Program Data > 

Student Admissions > Application Maintenance > Maintain Applications

Application Program Data > 

Student Admissions > Application Maintenance > Maintain Applications

Application Data > 

Note: Clicking the  (Enter a New Comment) icon opens a new browser "popup" window. If you have some type of popup blocking software activated, you may not see the new windows. Either disable the popup blocker, or allow all popup from this site.






Alternate Method B:


Campus Community, Comments, Comments - Person, Person Comment Entry

Step 1A: Prospect Career or Program Data; Application Program Data (recommended)

First, locate the prospect or applicant on the database, although you have probably just entered or changed some information for the individual. Determine which administrative function is appropriate for the comment. For prospects (as in this example), follow the “Recruit Prospects” Navigation. For applicants, follow The “Process Applications” navigation.

1.1 Shortcut to Comment Entry

Biographical Details	Addresses	Regional	Prospect Career Data	Prospect Program Data	Prospect School/Recruiting
Kate Mulgrew		0137473			
Academic Career: Undergraduate		Institution: UMS05		  	
Admit Term:		0710 	2006 Fall	<input type="checkbox"/> Applied	
Admit Type:		FYR 	First-Year Student		

1A.1.1 Click the  icon on the appropriate page. Go to **Step 2**.

Step 1B: The Personal Comment Entry Search Page (alternate method)

Follow the “Alternate Method B” navigation above to bring up a Search Page for entering Personal Comments. Enter information required to locate the student in the database.

This page behaves a little differently from other search pages in that you are actually searching for an existing comment or getting ready to add a new one.

1.1 Entering Search Criteria

Person Comment Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

ID:	begins with	<input type="text" value="v"/>	<input type="text" value="0137473"/>	
Sequence Number:	=	<input type="text"/>	<input type="text"/>	
Administrative Function:	begins with	<input type="text"/>	<input type="text"/>	
Comment Category:	begins with	<input type="text"/>	<input type="text"/>	
Academic Institution:	begins with	<input type="text"/>	<input type="text"/>	
Comment Date:	=	<input type="text"/>	<input type="text"/>	
National ID:	begins with	<input type="text"/>	<input type="text"/>	
Campus ID:	begins with	<input type="text"/>	<input type="text"/>	
Last Name:	begins with	<input type="text"/>	<input type="text"/>	
First Name:	begins with	<input type="text"/>	<input type="text"/>	

Case Sensitive

Search
Clear
[Basic Search](#)
 [Save Search Criteria](#)

No matching values were found.

[Find an Existing Value](#) | [Add a New Value](#)

- 1.1.1 **ID:** If you know the student's EMPLID, enter it here. This is the most efficient way to search for a student.
- 1.1.2 **Campus ID:** The University of Maine System is not currently using the Campus ID.
- 1.1.3 **National ID:** If you know the student's National ID number (Social Security Number for USA, Social Insurance Number for Canada), enter it here.
- 1.1.4 **Last Name:** You can enter a portion of the last name as search criteria.
- 1.1.5 **First Name:** You can enter a portion of the first name as search criteria.
- 1.1.6 Click Search to continue or Clear to have the system clear all of the text boxes so you can start again.
- 1.1.7 If the person has comments already, a list of them will be returned and you may select one to append or click on [Add a New Value](#) or Add a New Value to add a new comment.
- 1.1.8 If the person does not have any comments, you will see a "no matching values found" message. Click on [Add a New Value](#) even if you are not seeing the name of the person to whom you want to add the comment.

Person Comment Entry

Find an Existing Value | Add a New Value

ID:

[Find an Existing Value](#) | [Add a New Value](#)

1.1.9 If necessary, enter the person's ID then click .

Step 2: Personal Comment Entry

When you have found the correct person, click Add and the Personal Comment Entry page appears. If you have clicked the icon from another page, a new browser window will open the Personal Comment Entry page.

2.1 Personal Comment Entry

Person Comment Entry

Kate Mulgrew ID: 0137473

Comment DateTime: 02/01/2006 5:37:42PM

*Administrative Function: Prospect

*Academic Institution:

*Comment Category: Prospect PROS General Comment

Comment Data	
*Comment ID:	<input type="text" value="0030003"/> Patterson, Gregory J
Department:	<input type="text"/>
Comment Date:	<input type="text" value="02/01/2006"/>
Comments	<input type="text" value="Kate has strong leadership skills."/>
Append Comments:	<input type="text"/>

2.1.1 **Comment Date Time** is a date/time stamp reflecting the machine time at which you enter the comment.

2.1.2 **Administrative Function** will default to the function appropriate for the page on which you clicked , although the administrative function may be changed to one more appropriate for the comment you are about to add:

Prospect Career Data will assign an administrative function of PROS to the comment

Prospect Program Data will assign an administrative function of PROP.

Application Program Data will assign an administrative function of ADMP.

Application Data will assign an administrative function of ADMA.

2.1.3 **Academic Institution** is should be populated from your operator defaults.

2.1.4 **Comment Category** can be selected from the lookup list, which is limited by security.

2.1.5 The **Variable Data** button displays **required fields** associated with each administrative function. Click to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function. If you transferred to this page directly from a functional area, the variable data transferred from there. If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred from the functional area. In this case, only Academic Career is necessary:

2.1.6 **Comment ID:** Enter the EMPLID of the person making the comment. The person's name should appear when you tab-out. This will usually default to the operator.



2.1.7 Select the commenter's **Department** from the lookup list.

2.1.8 The **Comment Date** will default to today's date, but may be changed as appropriate.

2.1.9 Enter the comment in **Comments** as free-form text.

2.1.10 If you are adding to an existing comment, enter your additional comments in **Append Comments** and "sign it" with your initials and date.

2.1.11 Click  Save to assign this comment to this person.

If you have accessed this page by clicking the  (Add a New Comment) icon and opening a new window, then it is recommended that you close this browser window with either **File – Close** or .

Source Documents

Security Roles

Maintained by:

Do not restrict access. Data access is controlled by 3C Group Security.

Viewable by:

APPROVED and TESTED by Admissions and Campus Community Team on February 21, 2006.