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

Student Recruiting > Maintain Prospects > Add/Update Prospects

Student Admissions > Application Maintenance > Maintain Applications

Student Admissions > Application Maintenance > Maintain Applications

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

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

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

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:
will assign an administrative function of PROS to the comment
will assign an administrative function of PROP.
will assign an administrative function of ADMP.
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:

<table>
<thead>
<tr>
<th>Variable Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Career:</td>
</tr>
</tbody>
</table>

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.