CAMS® Enterprise

Document Tracking

Unit4 Education Solutions, Inc.
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Abstract

This document will discuss how Document Tracking is used as an integral part of communications management at your institution. Document Tracking is available in all Prospect and Student-related modules of CAMS. Topics covered include Document Tracking setup, use, and reporting.

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Document Tracking

Document Tracking in CAMS Enterprise consists of affixing a single document, or more typically, a set of documents to Prospect and Student records. Each module can generate any number of document groups that include a set of items required in order to meet your institution's standards. Groups of documents are defined in **CAMS Manager >Lookup Table Options >DocTrack Setup**. Once created, these groups of documents can then be assigned to the appropriate Prospect/Student records.

The Document Tracking feature in CAMS consists of these primary functions:

- Creating Groups of Documents Required (by student type, program type, etc.).
- Assigning/applying document requirements to Prospect or Student records (individual documents or group of documents).
- Maintain status of document request (complete, incomplete, not required, etc.).
- Document Image
- Generate reports that display status of documents required (by student or by specific document).

Creating Document Groups

Create Document Tracking Groups in order to define Document Sequences by group. Applying a sequence of documents based on a particular group is beneficial in that you will not need to add each document to the Prospect or Student record individually. Prior to creating the groups, it will be necessary to populate two glossary categories in the CAMS Manager module:

- **Doc Status**: Statuses necessary for processing and maintaining document requirements (incomplete, complete, not required, etc.).
- **DOCUSERDEF**: Values your institution wishes to use for the User Defined Field drop-down available in the Document Tracking detail and Doc Tracking Report criteria.

Note: *You can create as many groupings, or sequences, of documents as your institution requires.*

Step-By-Step: Create Documents

1. From the CAMS Enterprise Home page, click **CAMS Manager >Lookup Table Options >DocTrack Setup**. The Doc Track Setup window opens with the **Basic** tab displayed.

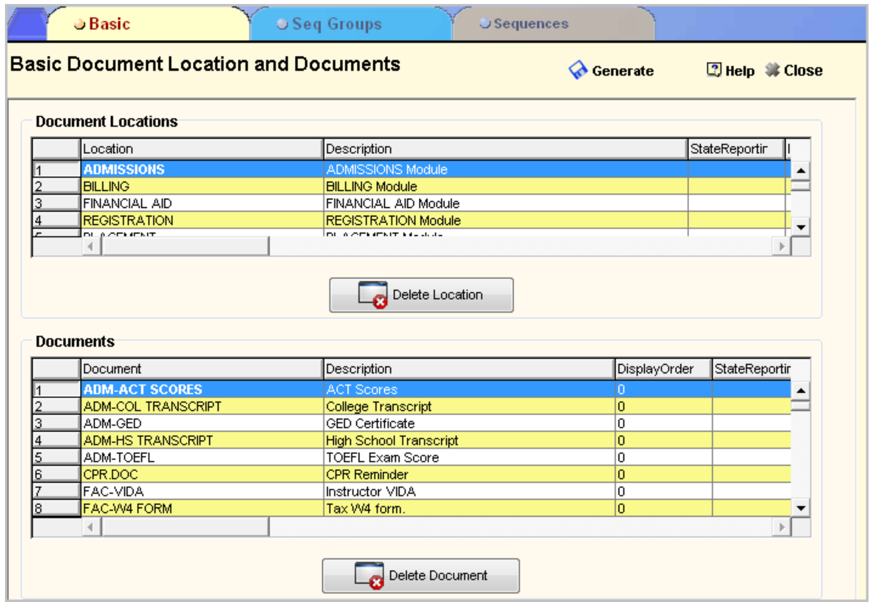

Figure 1: DocTrack Setup – Basic tab

2. **Document Locations** correspond directly to the CAMS Enterprise modules and must be named exactly as the module name in order for documents linked to the Document Location to display in that module. Current CAMS module locations are already defined and cannot be deleted. Creating new locations is not recommended as the business logic required to utilize the location is not automatically added to user-created Document Locations.

3. In the **Documents** grid, double-click an existing document to modify or right-click to add a new document. The document detail window opens.

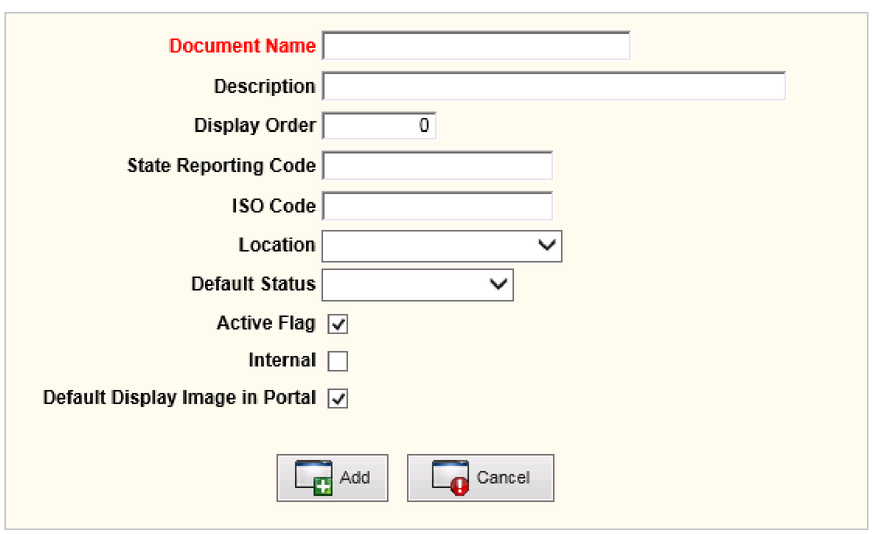

Figure 2: Document detail

4. Enter the **Document Name** (required).
5. The **Description** entered here will automatically display as the Description for the document when it is added to a student's Document Tracking.
6. Use the **Display Order** to determine the order in which the values from 0 to n will appear in the drop-down list.
7. Enter the **State Reporting Code** and **ISO Code** if required.
8. Select a **Location** to restrict a document to that location or module only. Documents with a blank Location will be available in all modules.

Note: *Documents assigned to students from within a Module may only be viewed from that Module's Document Tracking window.*

9. Select the **Default Status** that will display when adding a single document or adding this document from within a sequence.
10. Documents can be marked inactive by removing the check mark in the box next to **Active Flag**. Only active documents will be available to users when adding a Document Tracking item. All documents will be available for reporting criteria.
11. Place a check mark next to **Internal** and if this document is always an internal document or **Default Display Image in Portal** if attached images should display in the portal. This will eliminate an extra step when applying the document to the student record and can be changed when adding the Document Tracking item if necessary.
12. Click **Add** to save the new record or **Cancel** to exit without saving.
13. Repeat these steps for each document you wish to add.
14. To delete a document, highlight the row in the **Documents** grid, then click **Delete Document**. Documents cannot be deleted if it is used in a student record or in a Document Sequence.

Note: *When modifying an existing document entry, CAMS will check to see if the document is used by any document sequences already defined. If so, you will receive a prompt asking if CAMS should update any of the related fields, such as Internal or Active, to match that of the modified document entry. Click* ***Yes*** *to update the documents already defined in a sequence or* ***No*** *to not update existing records. Regardless of whether you opt to update existing sequence documents or not, your changes to the current document entry will be saved.*

Note: *To generate the SSI files, click the* ***Generate*** *hot spot at any time or simply close the window after changes have been made.*

Step-By-Step: Create Document Sequence Groups

Sequence Groups by default are not location specific. Group Names can be any text up to 50 characters and are used as a grouping mechanism to add documents to a Sequence Group. Mapped Sequences are a means to set up only specific document sequence groups by location. If a particular module has no defined Mapped Sequenced, then all Sequence Groups will be available to that module when loading a sequence of documents to a student record.

1. From the CAMS Enterprise Home page, click **CAMS Manager >Lookup Table Options >DocTrack Setup**. The Doc Track Setup window opens with the **Basic** tab displayed. Click the **Seq Groups** tab.

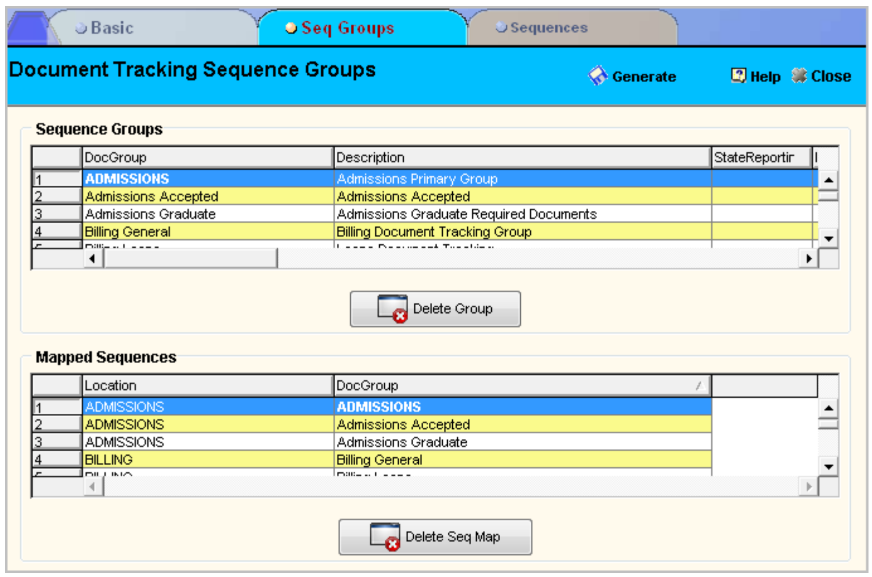

Figure 3: Document Tracking Sequence Groups

2. In the **Sequence Groups** data grid double-click an existing group to modify or right-click to add a new group. The group detail window opens.

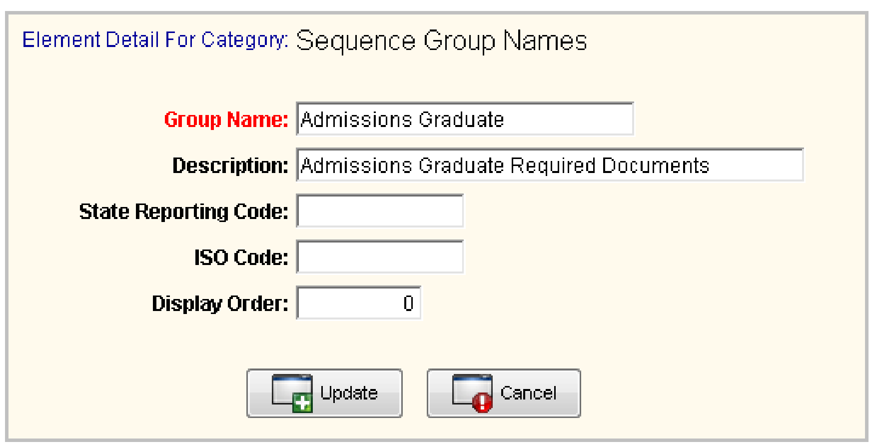

Figure 4: Sequence Group detail

3. Enter the **Group Name** (required) and a **Description**.
4. Enter the **State Reporting Code** and **ISO Code** if required.

5. Use the **Display Order** to determine the order in which the values from 0 to n will appear in the drop-down list.
6. Click **Add** to save the new record or **Cancel** to exit without saving.
7. Repeat these steps for each Sequence Group you wish to add.
8. To delete a Sequence Group, highlight the row in the grid, then click **Delete Group**. Document Groups cannot be deleted if they are linked to a Mapped Sequence or are used in a Document Sequence.
9. To add a Sequence Group to a Mapped Sequence, right-click in the **Mapped Sequence** grid to access the detail entry form.

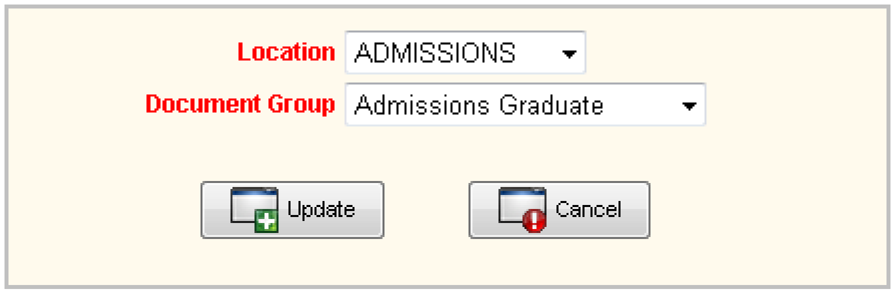

Figure 5: Mapped Sequence Group

10. Select the **Location** and **Document Group** from the drop-downs.
11. Any documents added to this Mapped Sequence will be available only for the Location to which it is mapped.
12. To delete a Mapped Sequence, highlight the row in the **Mapped Sequences** grid, then click **Delete Seq Map**.

Step-By-Step: Create Document Sequences

1. From the CAMS Enterprise Home page, click **CAMS Manager >Lookup Table Options >DocTrack Setup**. The Doc Track Setup window opens with the **Basic** tab displayed. Click the **Sequences** tab.

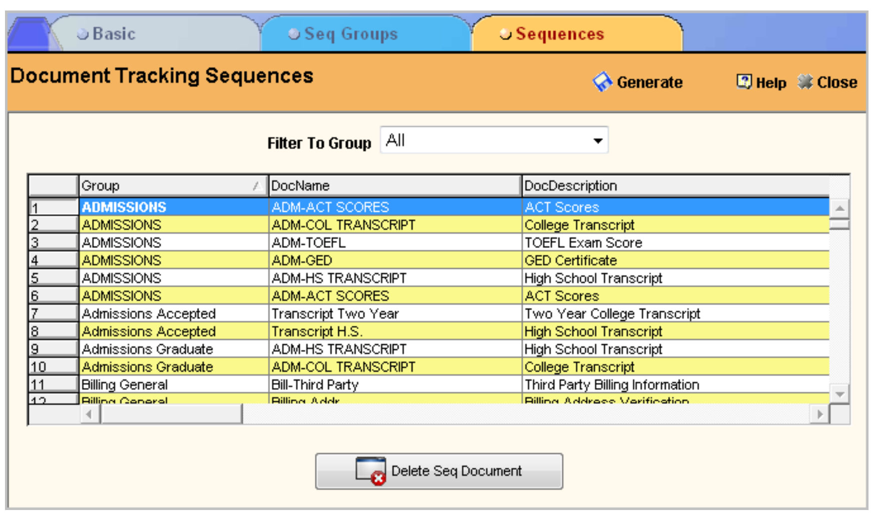

Figure 6: Document Tracking Sequences

2. The Sequences tab contains a single data grid which by default shows all documents in all Sequence Groups. Select a group in the **Filter To Group** drop-down to display only those documents in the selected group. You must select a group prior to adding or modifying a document defined in that group.
3. To modify or add a document to a Sequence group, select the group from the **Filter To Group** drop-down.
4. Double-click an existing document to modify or right-click to add a new document. The document detail window opens.

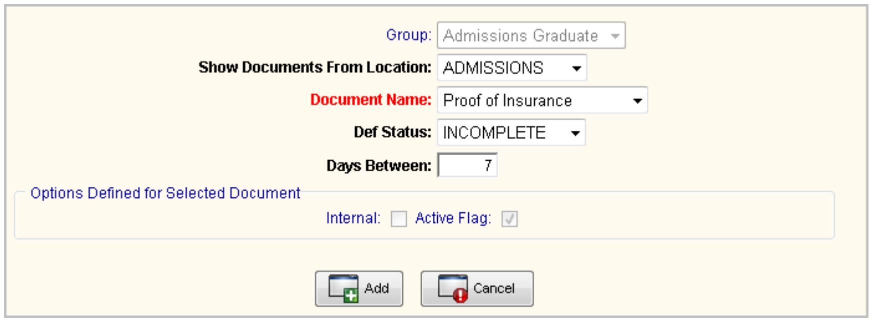

Figure 7: Sequence Group document detail

5. The **Group** field is automatically populated for the group selected.
6. The **Show Documents From Location** drop-down defaults to a blank value allowing you to select from ALL active documents in the **Document Name** drop-down. Select any value in the **Show Documents From Location** to list only active documents defined with that default location and any document names that have no default location defined. Documents from any defined Location may be added to any Sequence Group.
7. Select the default status (Glossary: Doc Status) for the document. For instance, if the document always starts as incomplete, then mark it as such for the default. This will eliminate an extra step when applying the document requirement to the student record.
8. Optionally, enter the number of days from the start date for which time this document is due. The due date will be automatically calculated based on the start date entered at the time of loading a Document Sequence.
9. Click **Add** to save the new record or **Cancel** to exit without saving.
10. Repeat these steps for each document you wish to add to the Sequence group.

Adding Documents to Prospect or Student Records

Document Tracking is available in the Prospect module and all Student-related modules of CAMS. The functionality is identical in each module with the following exceptions:

- Within each module, you may only select documents that have been linked to that **Location** in Document Tracking Setup (see page 4) or documents with a blank **Location**.
- The Admissions module has additional functionality that may be used to link documents to specific GPA Groups that have been applied to the Student Admissions Information.
- Prospect documents will copy forward to the Student record when the Prospect is loaded to Student. Any documents added to the Prospect record after that will also display in the Student record. Documents added to the Student record will NOT copy back to the Prospect record.
- The Financial Aid module allows linking documents to an Academic Year/Financial Aid Year which are populated automatically based on the record highlighted on the Status tab or by selecting the Financial Aid Year in the **Filter to Package** drop-down on the Documents tab. You will be able to select any Academic Year/Financial Aid Year that exists for the student in Financial Aid Maintenance or, if no status records exist for the student, you may choose any current or future Academic Year/Financial Aid Year as defined in Financial Aid Yearly Setup. Once an Academic Year/Financial Aid Year has been linked and saved, it cannot be changed for that document.

Documents may only be viewed from within the module they are added. For example, documents added in Admissions cannot be viewed from within Registration. Only documents with a Location defined for a specific module or documents with a blank Location are available to add to a student record from within that module.

The following instructions pertain to the Admissions module which has additional functionality that may be used to link documents to specific GPA Groups.

Note: *Documents added to a Prospect record will copy to the Student record when the Prospect is loaded to Student. Any documents added to the Prospect record after it has been loaded to Student will also appear in the Student record. Documents added to the Student record after the Prospect has been loaded to Student will NOT appear in the Prospect record.*

Step-By-Step: Add a Single Document

1. From the **CAMS Enterprise Home** page, click **Admissions >Students** (or **Prospects**) **>Document Tracking**. The Document Tracking window opens with the **Documents** tab displayed.

2. In the Admissions module documents are associated with a GPA group. If using Admissions Document Tracking, select an **Admission GPA Group** to view the documents linked to that group or select **No Filter** to view all documents that have been added to the student record in the Admissions module.

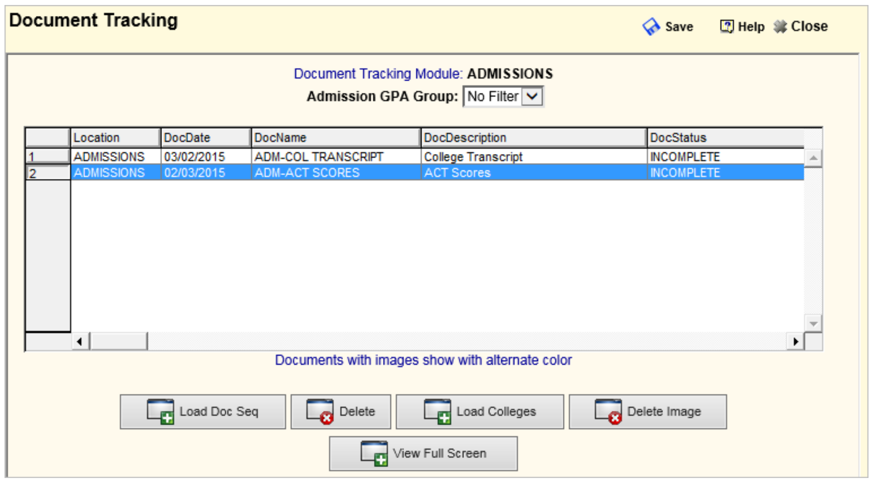

Figure 8: Document Tracking Window

3. Right-click in the data grid to open the document tracking detail entry form.

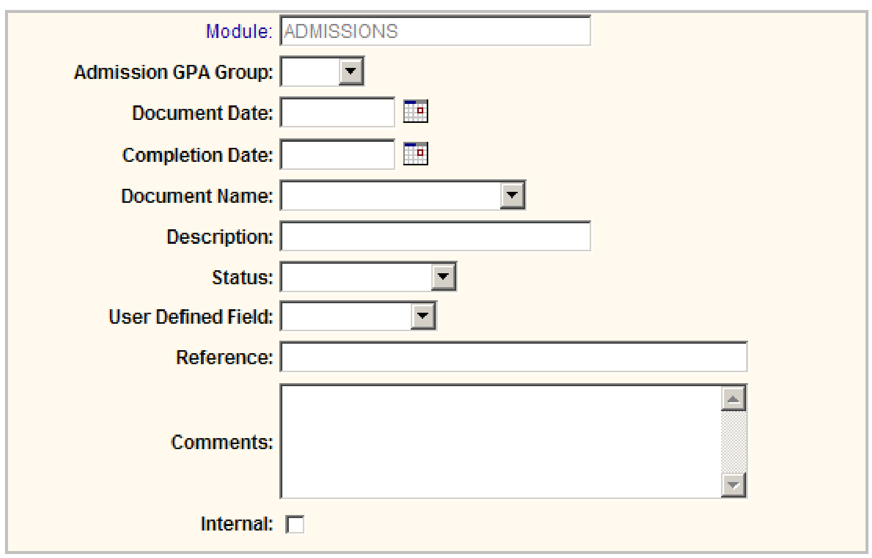

Figure 9: Document Tracking Detail Entry Form

4. Select the **Admission GPA Group** to which you wish to link the document. This will default to the GPA Group that is already selected on the Documents tab or the students active GPA Group if **No Filter** has been selected. Any active or inactive GPA Group assigned to the Student Admissions Information record will display and may be selected.
5. Enter the **Document Date** (or Due Date).
6. Skip the **Completion Date** unless the requirement has been met and you are recording the item and completion date at the same time.
7. Select the **Document Name** from the drop-down list.
8. Type a general description in the **Description** field.
9. Select a **Status** from the drop-down list (Glossary: Doc Status) such as Incomplete, Complete, Not Required, etc.
10. If your institution is utilizing the **User Defined** field (Glossary: DOCUSERDEF), make the appropriate selection.
11. Use the **Reference** field for further defining the document/requirement.
12. Enter **Comments** as desired.
13. Place a checkmark next to **Internal** if the Document Tracking item should not display on the Student Portal.
14. Click **Add** to save new record or **Cancel** to exit without saving.

Note: *The Admission GPA Group may be changed at any time for any document. Student documents may be assigned a blank GPA Group or any GPA Group (active or inactive) that exists on the Student Admissions Information record. Prospect documents may be assigned either a blank GPA Group or the GPA Group associated with the current Entrance Program in the Prospect Maintenance record.*

Step-by-Step: Add a Document Sequence

1. From the Document Tracking form (**Admissions >Students** (or **Prospects**) **>Document Tracking**), select the **Admissions GPA Group** you wish the documents to be linked with. If the **No Filter** is selected documents will be linked with the students default GPA Group.

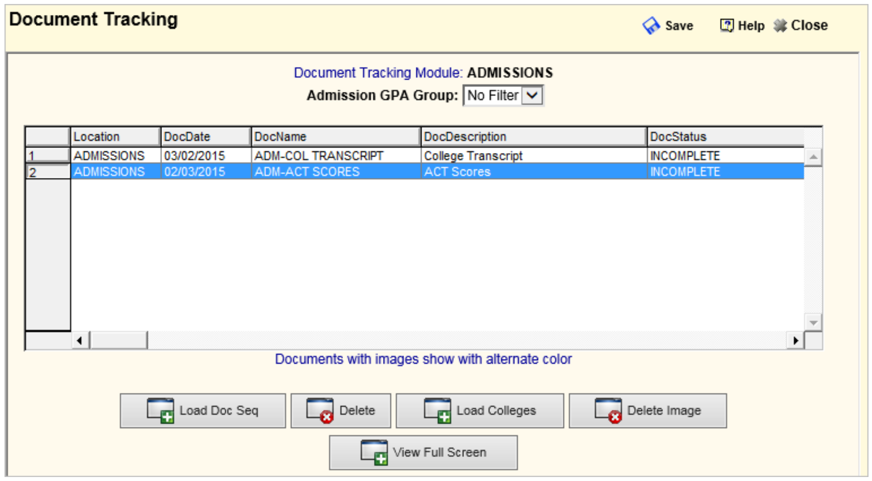

Figure 10: Document Tracking

2. Click the **Load Doc Seq** button.

In certain cases, you may have items that are included for some prospect or student types but not for others. In such cases, you can do one of two things: 1) either delete the unnecessary document from the record, or 2) change the status of that document to a value such as 'not required'.

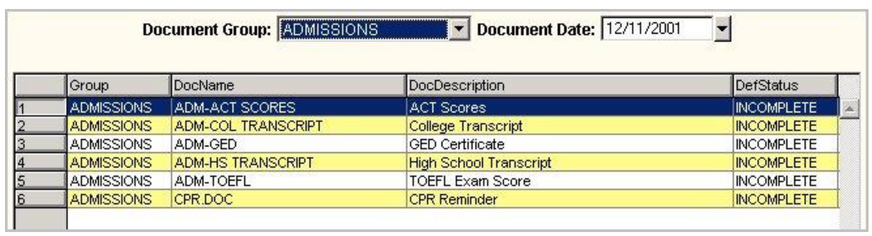

Figure 11: Load Sequence window

3. Select the **Document Group** from the drop-down list. Once selected, all items sharing that group name are listed. Document groupings setup is described in Creating Document Groups on page 4.
4. Enter the **Document Date** (the Start Date for the sequence of documents). The default date is the current date. If any values were placed in the 'Days Between' field of the Document List reference table, this value will be added to this Start Date to calculate the due date of the document(s).
5. Click **OK** to add the group of documents or **Cancel** to exit without saving.

Step-by-Step: Load Colleges

Single documents such as a transcript can be added for each college associated with the prospect or student in one step via the **Load Colleges** function. Colleges are associated with prospects in **Admissions >Prospects >Change Prospect >More tab >Colleges** and with students in **Admissions >Students >Change Student >More tab >Colleges**.

1. Open the document tracking form by clicking **Admissions >Students** (or **Prospects**) **>Document Tracking**.
2. Click the **Load Colleges** button.

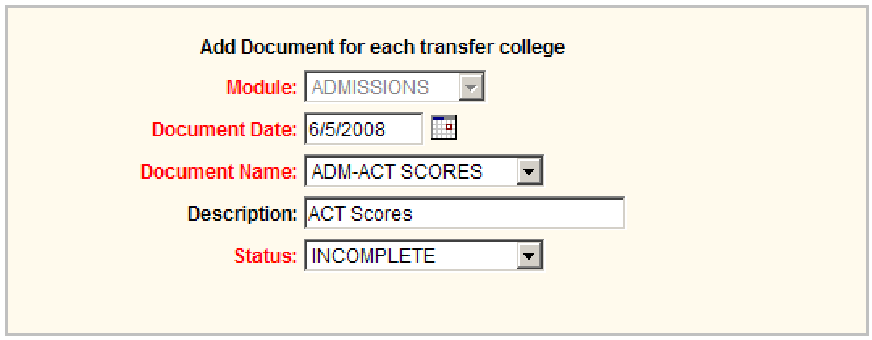

Figure 12: Load Colleges window

3. Enter the **Document Date** (the date the document is due). The default is the current date.
4. Select the default document name from the drop-down. The description will be automatically populated as entered in the DOC NAMES glossary table for that document and may be changed as desired from this window.
5. Select the default status.
6. Click **OK** to add this document to each college linked to the student or **Cancel** to exit without saving. Each college name is placed in the **Reference** field of the document(s) detail.

Document Tracking Maintenance

Once an item has been fulfilled by the Prospect or Student, the status of the document can then be changed from “Incomplete” to “Complete.”

Step-by-Step: Maintaining Document Tracking

1. Open the document tracking form by clicking **Admissions >Students** (or **Prospects**) **>Document Tracking**.
2. Double-click on the document to be updated; the document tracking detail form will open.
3. Select the desired status value from the **Status** drop-down list (Glossary: Doc Status).
4. Enter a **Completion Date** to mark this document as complete in the system.
5. Add any **Comments** as desired.
6. Click **Update** to save changes or **Cancel** to exit without saving.

Document Image

An image of the document can be stored and assigned to a Document Tracking entry for immediate viewing. You can use scanned or original documents. If an image is associated with a document item the item will display in blue in the data grid. Storing document images may use a large amount of disk space. Ensure that there is always enough space to run CAMS Enterprise effectively.

Step-By-Step: Assign a Document Image

1. Highlight the document item in the data grid on the Documents tab.

Document items with associated images

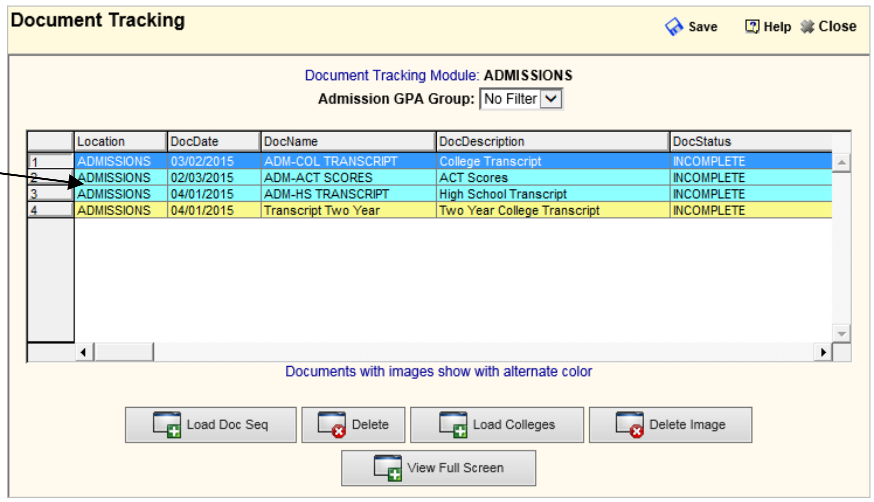

Figure 13: Highlight Document

2. Click the **Image** tab. The **Document Image** window displays.

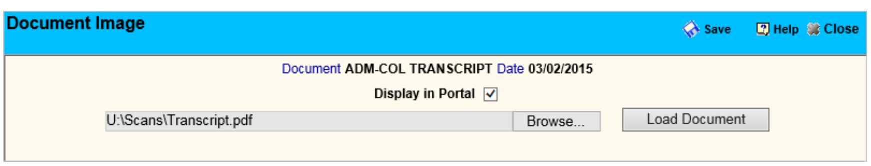

Figure 14: Assign Image to Document

3. Use the **Browse** button to navigate to and select the image document. Any image type document may be assigned if it can be viewed with an associated program, such as, a PDF, JPG, Microsoft Word, etc.
4. Click **Load Document** to upload the document image to CAMS Enterprise.
5. **Display in Portal** allows the student to view the image from the student portal. Deselecting this box will keep the images from displaying in the student portal. Document images will not display on the portal if this is selected and the **Internal** checkbox is checked on the Document Tracking Documents tab.

Note: *To view certain types of images, such as TIFF files, a plug-in for Internet Explorer may have to be installed. A TIFF plug-in can be obtained from http://www.alternatiff.com*

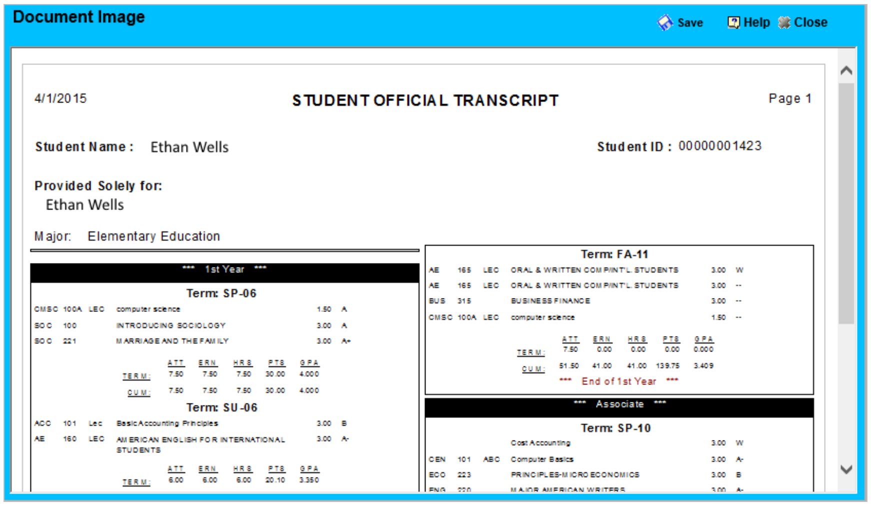

Figure 15: View Assigned Document Image

6. To view the image, highlight the document tracking item and click the **Image** tab. To view the image in a full-screen view click the **View Full Screen** button.
7. To delete the image, but not the document, click the **Delete Image** button.

Note: *Depending on the file type, a dialog box asking to Open, Save, or Cancel the document may display when uploading or viewing the document image. Click* ***Open*** *to view the document image or Cancel to not view the image. Clicking* ***Cancel*** *will not prevent the image from associating with the document item when uploading.*

Document Image Setup Issues

Document Image files that are larger than 200Kb may only display a red X.

Data is stored in SQL table DocImage. DocImage table will reside on the INDEXES file (see database files in enterprise manager). If you plan on storing a large number of student documents then check the size of the hard drive where the cams database resides. Make sure you have lots of free space. Cams will store images,PDF's, word docs, etc.

Note: *Windows 2003 server customers may have trouble uploading large documents. This applies to any file that is uploaded not only related to document images. It has to do with an IIS setting. First, stop IIS. Open your metabase.XML which is located in c:\Windows\System32\Inetsrv find the line "AspMaxRequestEntityAllowed" and change it to "1073741824". This is 1GB - of course you can enter another value to suit your needs. Save changes and then start IIS.*

Also IIS 6.0 under windows 2003 limits the download size of a file in its meta base. IIS 6.0 has a file named ***metabase.xml*** *which resides in the folder C:\Windows\system32\inetsrv. By default, this file has this entry:*

```
AspBufferingLimit = "4194304"
```

This limits download size to 4,194,304 bytes (4 MB), and larger files will be silently truncated with no message from IIS. You can change that to a large value (such as 2000000000 for 2 gigabytes) to allow your Windows 2003 server to send large downloads.

You may need to stop the IIS service before you can save the metabase.xml file and have the change take effect.

Buffering

You will also need to turn on Buffering for the CAMS Enterprise website.

Step-By-Step: Turn on Web Site Buffering

1. Open the IIS MMC and right click on the CAMS Enterprise website and select **Properties**.
2. Click the **Home Directory** tab and then click the **Configuration** button.
3. Click the **Options** tab and check the **Enable buffering** option.
4. Click **OK** all the way out of the Web Site Properties window.

Document Tracking Reports

The Document Tracking report functions like the standard BYOR reports within CAMS. Simply identify the reporting criteria and select the report format.

Step-by-Step: Prospect Document Tracking Reports

1. From the **CAMS Enterprise Home** page, click **Admissions >Prospects >Reports >Document Tracking Reports**. The Prospect Document Tracking Reports window opens.
2. Select any document-related criteria on the **Documents** tab. By default, the **Location** has the blank location as well as the location identified by the module preselected.

Note: *The blank and Admissions locations must be selected in order to report on any Document Tracking item applied to a prospect record.*
Academic Year criteria should not be used for the Prospect Document Tracking Reports.

3. Click the **Prospects** tab and select any prospect-related criteria necessary.
4. Choose the criteria on which you will base your report. For example, select “Incomplete” status to generate a report that will display outstanding document requirements.
5. Click the **Reports** tab.
6. Select the desired report for the **Report Format** drop-down list.
7. Click **Print**. CAMS displays the report results in the Crystal Report Viewer.

Step-by-Step: Student Document Tracking Reports

1. From the **CAMS Enterprise Home** page, click **Admissions >Students >Report >Document Tracking Reports**. The Student Document Tracking Reports window opens.
2. Select any document-related criteria on the **Documents** tab. By default, the **Location** has the blank location as well as the location identified by the module preselected.

Note: *The blank location should be selected in order to report on any Document Tracking item applied to a student record that does not have a Location set in DocTracking Setup.*

3. Selecting an **Academic Year** will automatically populate the **Fin Aid Year** field with any Financial Aid Years defined for that Academic Year and preselected. **Left-click** a single Financial Aid Year or use **Ctrl + Left-click** to select multiple Financial Aid Years. Only one Academic Year may be selected at one time.
4. Click the **Students** tab and select any student-related criteria necessary.
5. Choose the criteria on which you will base your report. For example, select “Incomplete” status to generate a report that will display outstanding document requirements or choose a **Status Term** and **Student Registered** = **Yes** to display only registered students for that term.
6. Click the **Reports** tab.
7. Select the desired report for the **Report Format** drop-down list.
8. Click **Print**. CAMS displays the report results in the Crystal Report Viewer.

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