



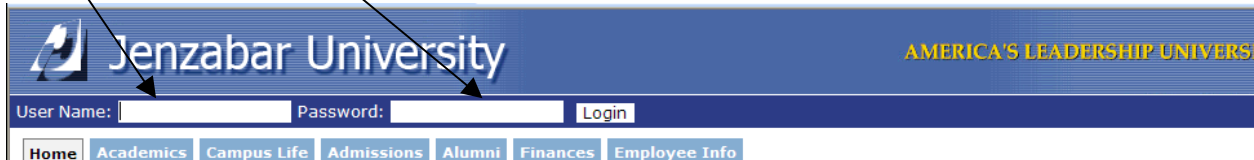
**FACULTY CRM**

**TRAINING MANUAL**

**Nancy Bluse, Senior Business Consultant**

The Faculty CRM (Constituent Relationship Management) in JICS (Jenzabar Integrated Campus Solution) is designed to give faculty and advisors web access to information from the EX database through a web functionality.

To begin, you must first login to your JICS site and then enter your user name and password. Then click the login button.



You will then view your name, as well as any of the tabs in JICS that you have available for viewing.

We are going to review the faculty tab. Click on the faculty tab. This page will contain information on how to navigate the page, faculty course control, and course authorization portlets.

We will first review the Faculty Course Control Portlet. This portlet will allow you to view course details, view and print class lists, enter grades, as well as enter textbook information. To access one of these functions, click the down arrow (select area) on the course and select the appropriate function.

## Faculty

[Printer Friendly](#)

**Faculty Course Control**

**Course List for Linda F Arndt**

**Term:**

**Division:**

[View My Faculty Schedule](#)

2009-10 Spring Semester			
Course	Title	Division	Go Directly To
BUS 0106 01	Financial Math	Undergraduate	Select Area ...
BUS 0200 01	Computer Acctg	Undergraduate	Select Area ...
BUS 0221 01	Macroeconomics	Undergraduate	Select Area ...
BUS 0222 01	College Actg II	Undergraduate	Select Area ...
MTH 0106 01	Financial Math	Undergraduate	Select Area ...

We will first review the course details function. When selecting course details in the select area box, the following will appear:

**Faculty Course Control - Course Details**
🔍 ?

[Faculty Course Control](#) > Course Details

**Course Details**

**Financial Math (BUS 0106 01)**  [Back](#)

Instructor(s): Arndt, Linda F

2009-10 Spring Semester, Undergraduate	3.00 Credit(s)
Dept: BUS	Clock Hours: 0.00
Status: O (17 out of 25 seats)	

This course has other requirements. [Course Requisites](#)

**Note:** No note is available for this course.

**Course Schedules**

Day & Time	Date(s)	Location
MW 9:00 AM-10:25 AM	1/19/2010 - 5/12/2010	LCOOCC Main Campus, Main Bldg-LCOOCC, 409

**Course Description**

No Course Description is available for this course.

[All courses in the BUS Department, Undergraduate Division](#)

**Cross-listed Courses**

Course	Type	Title	Capacity	Enrollment	Waitlisted
BUS 0106 01	Parent	Financial Math	25	8	0
<b>Totals:</b>			<b>25</b>	<b>8</b>	<b>0</b>

This window will display all of the details on the course including course pre- or co-requisites, as well as the course description (if this information has been entered into EX).

One big note that should be remembered is that you CANNOT use the back button on your browser. To go back to the previous page, click the back button in the window, or click back on the breadcrumbs under the faculty course control header ([Faculty Course Control](#) > Course Details)

If you click on the Faculty Course Control, it will bring you back to the previous window.

Next, we will select class list. The following will appear:

**Faculty Course Control - Class List**

Set Options

Faculty Course Control > Class List

Course: no photos

**Course Details 2009-10 Spring Semester | Undergraduate | BUS 0106 01 | Financial Math**

Faculty	Meets	Dates	Rooms
Arndt, Linda F	MW 9:00 AM-10:25 AM	1/19/2010 -5/12/2010	MAIN/ MAIN/ 409

[Export to Excel](#)

**Class List 2009-10 Spring Semester | Undergraduate | BUS 0106 01 | Financial Math (8 students)**

FERPA Restrict	Student	Student ID	Status	Email	Advisors	Cross-listed Course	Credits	Major	Class	Division
	Hart, Daniel J	500004090	C - Current	<input type="checkbox"/> <a href="#">✉</a>			3.00	Business Administration - Small Bus Mgt	FR	UG
	Kisch, Lisa	500007992	C - Current	<input type="checkbox"/> <a href="#">✉</a>			3.00	Medical Assistant	SO	UG
	LaPointe, Michael A	500005042	C - Current	<input type="checkbox"/> <a href="#">✉</a>			3.00	Liberal Arts	FR	UG
	Magowan, Laura J	500010029	C - Current	<input type="checkbox"/> <a href="#">✉</a>			3.00	Medical Office Mid-Management	FR	UG
	Morrow, Juliette S	500003183	C - Current	<input type="checkbox"/> <a href="#">✉</a>			3.00	General Studies Degree	SO	UG

This function will allow you to view and print your class list, as well as export this to an excel spreadsheet. You can also use this window to e-mail all or any number of your students by clicking on the e-mail button. This will open outlook and allow you to send the e-mail.

The next option in the faculty course control window is grade entry. Grade entry will be allowed at certain times during the semester and will be set up by the Registrar's Office. Only those grades that are available for your use will appear in the drop-down box.

**Faculty Course Control - Update Student Grades**

Faculty Course Control > Update Student Grades

**BUS 0106 01 Financial Math - Update Student Grades**

Student List for: Undergraduate 2009-10 Spring Semester

Instructors: Linda F Arndt

Cross-listed Courses:

Course Grading Type: Credit Courses Default Grade:

If the grading period is open and you have permission to enter grades, the default grade you select will be applied to students that have no grade and that have a grading type that matches the course grading type. Please note that the midterm grading type is not displayed on this screen, but if it is available, it is compared to the course grading type to determine whether or not to apply the selected default grade.

The Grading Type for students will only be displayed if it is different than the Course Grading Type.

FERPA Restr.	Student	ID	Grad?	Final Grade	Grading Type	Absences	Clock Hrs	Cross-listed Course	Class	Division
	Hart, Daniel J	500004090	N	<input type="text" value="Select..."/>		<input type="text" value="0"/>	<input type="text" value="0.00"/>		FR	UG
	Kisch, Lisa	500007992	N	<input type="text" value="Select..."/>		<input type="text" value="0"/>	<input type="text" value="0.00"/>		SO	UG
	LaPointe, Michael A	500005042	N	<input type="text" value="Select..."/>		<input type="text" value="0"/>	<input type="text" value="0.00"/>		FR	UG

Using the drop-down box, you will select the appropriate grade. Once you have completed entering all grades, click the save button on the bottom of the window. This will submit your grades to the Registrar's Office electronically.

The last function in this window is the textbook entry. This window will allow you to enter and store textbook information on your course.

Click on [Add New Textbook to Assign to Course](#) - the following window will appear;

Enter the book title, author, price (if known), ISBN number, publisher, and if desired, description. This information will then be stored in the EX database and can be used to attach to the same course in future years and semesters. **NOTE: Due to new Federal Regulations, students must have the accessibility to this information. This would be a way that a faculty member could enter this information and a student could then view this on the web. This can also be a way to submit book orders for a course. The table in EX that is populated with this information can then be printed off and submitted to the bookstore.**

The next portlet we will review is the course authorizations portlet. This portlet is designed to allow the faculty member to give permission to a student to register for one of her/his courses even though they do not have the pre-requisite, the class is full or there is a time conflict with another course.

**Course Authorization**

Set Options

Students may be authorized to register for a course even if the course is full or if the student does not meet a requisite or has a schedule conflict. Click on a course to view authorizations or to add authorizations for that course.

Term: 2009-10 Spring Semester  
Division: All

**Faculty: Linda F Arndt**

Course	Total Authorizations
<a href="#">BUS 0106 01</a>	0
<a href="#">BUS 0200 01</a>	0
<a href="#">BUS 0221 01</a>	0
<a href="#">BUS 0222 01</a>	0
<a href="#">MTH 0106 01</a>	0

[Course List](#)

To enter a course authorization, click on the appropriate course in the window shown above. The following will appear:

**Course Authorization - Details**

Set Options

[Course Authorization](#) > Details

**Navig Hlthcare**

HTH 0231 01 Undergraduate 1.00 Credits  
Capacity:46 Enrollment:39 Waitlisted:0

**Course Authorization Totals:**

Show  
 All Conditions  
[Add New Authorizations](#)

**Authorizations Granted**

No Course Authorization data was found.

Click the Add New Authorizations button. The following window will appear:

## Course Authorization - Add New Authorizations

Set Options

[Course Authorization](#) > [Details](#) > Add New Authorizations

### Navig Hlthcare

Undergraduate 1.00 Credits

Capacity:46 Enrollment:39 Waitlisted:0

#### Add Authorization

To add an authorization for this course, you must first search for a student by entering their name and/or ID in the fields below.

Last Name:  First Name:  ID:

[Advanced Search](#)

Enter the student's name and click the search button. The following window will appear:

### Navig Hlthcare

Undergraduate 1.00 Credits  
Capacity:46 Enrollment:39 Waitlisted:0

#### Add Authorization

To add an authorization for this course, you must first search for a student by entering their name and/or ID in the fields below.

Last Name:  First Name:  ID:

[Advanced Search](#)

When a student has been retrieved, the window displays the authorization conditions for which you have permission to grant authorization. For authorizations to be saved, the Add box must be checked and a Reason selected from the drop down when you click the Add Authorization(s) button.

**Student: Wade, Breanna M ID: 500008795**

Add	Authorization Condition	Reason
<input type="checkbox"/>	Capacity	<input type="button" value="v"/>
<input type="checkbox"/>	Course Requisite	<input type="button" value="v"/>
<input type="checkbox"/>	Schedule Conflict	<input type="button" value="v"/>

Click the type of authorization (capacity, course requisite or schedule conflict) and the select a reason in the drop-down box. Click the add authorizations button and the student can now register for the course on-line.

We will next review the advising functionality in the faculty window. This page will only be viewable by those individuals who have been given an advisor role in the system.

To access advising, click on the advising link on the left hand side of the page.

**Faculty**

**Default Page**

- [Course Authorization](#)
- [Navigating the Faculty Page](#)
- [Faculty Course Control](#)

**Advising**

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**Quick Links**



- ☰ **My Courses**
- ☰ **My Pages**
-  [Copy Courses](#)

The only portlet on this page is the advisee roster portlet. This is where you will be able to view your advisee information.

There are several options for search in the drop-down box. They include:

- All (View all Advisees Active and Inactive)
- Active Advisees
- Currently Registered
- Inactive Advisees
- Need Advisor Approval (This will only be used if the College has assigned students the advisor approval function for registration. This function allows the student to register for courses, but the advisor must then approve the course before it is officially registered.)
- Need Registration Clearance (This will only be used if the College has assigned students registration clearance. This function does not allow students to register until they have been granted clearance by the advisor.)
- New Students
- Not Yet Registered

Select an option and click the search button.

**Advisee Roster**  

**Search for Advisee(s)**

You must select a year and term if you select one of the following Advisee Status options: 'Currently Registered', 'Need Advisor Approval', 'Need Registration Clearance', 'New Students' and 'Not Yet Registered'. Selecting one of the other Advisee Status options will not allow you to specify a year and term. Additionally, the options where no year and term is available will not display the Registration Clearance column.


**Advisee Status:** All

**ID:**

**Last Name:**



**Division:** All

[Advanced Search](#)

 [Export to Excel](#)      [E-mail All Advisees](#)      [E-mail Selected Student\(s\)](#)

Ba - Sp | St - Zo [Next Page -->](#)

**Advisee Roster for: Carrie F Arrigo (29 advisees)**

FERPA Restrict	<input type="checkbox"/> Email	Name	Student ID	Needs to Register?
<input type="checkbox"/>		<a href="#">Baccam, Kristy L</a>	500008501	Y
<input type="checkbox"/>		<a href="#">Bisonette, Katie R</a>	500007612	Y



In this window, you can export the list to excel, e-mail all advisees or e-mail selected advisees.

To access information on your advisee, click on the advisee's name. This will bring up the following window:

The screenshot shows a web interface titled "Advisee Roster - Advisee Details". At the top, there is a breadcrumb trail: "Advisee Roster > Advisee Details". Below this, the name "Kristy L Baccam" is displayed with an email icon. The main content area is divided into two columns of information:

<b>Classification:</b> Sophomore	<b>Academic Status:</b> Full-time
<b>Planned Grad:</b> 5/11/2011	<b>Degree:</b> Associate of Science
<b>Max Credits:</b> 18.00	<b>Major:</b> Pre-Nursing

Below this information is a section titled "Tools and Information" with several sub-sections:

- Academic Records**
  - [Academic History](#)
  - [Course History](#)
  - [GPA Projection](#)
  - [Grade Report](#)
  - [Unofficial Transcript](#)
- Registration**
  - [Add/Drop Courses](#)
  - [Student Schedule](#)
  - [Advanced Course Search](#)
- Address**

8124 N Black Bear Lane  
Hayward, Wisconsin 54843  
715-634-9198
- Advising**
  - [Advisee Meetings](#)
  - [Course Needs](#)
  - [Degree Audit](#)
  - [Major Exploration](#)

In this window, you will have the ability to view the following: (Because this is FERPA restricted information, there will be no screen shots of this information included in this document.)

#### Academic History:

- Academic History – Lists the student's prior high school(s) and college(s), as well as any placement test scores that are on file.
- Course History – Shows the student's entire course history including any current work in progress.
- GPA Projection – Allows you to enter what a student anticipates receiving for grades in the current term to make a prediction of their GPA.
- Grade Report – Allows you to view and/or print a grade report.
- Unofficial Transcript – Allows you to view and/or print an unofficial transcript.  
NOTE: I would highly recommend that you do not print any transcripts. The student also has the ability on the web and I would direct them to do this themselves.

#### Advising:

- Advisee Meetings – Allows you to add a meeting and meeting notes for one of your advisees (This function is reviewed below).

- Course Needs – Allows you to view a student’s current progress in their degree or certificate program. You can also produce an advising worksheet with the students completed coursework, as well as the courses still left to complete.
- Degree Audit - Does much of the same functions as the course needs, except you are able to view all of the student’s coursework as it pertains to their degree or certificate.
- Major Exploration and What If Scenario – Allows you to work with a student to determine if they change their major, how will their coursework fit into the new major.

Registration:

- Add/Drop Courses – Allows you to assist student in making schedule changes.
- Student Schedule – Allows you to view and print a student’s schedule
- Advanced Course Search – Allows you to search the entire schedule for courses offered during a specified year and term.


The advisee meeting’s portlet shown below allows you to enter in a meeting date and time, and then add meeting notes.


**Advisee Roster** 🔍 ?

[Advisee Roster](#) > [Advisee Details](#) > Advisor Meetings List

**Advisor Meetings For: Baccam, Kristy L**



You may enter a start and/or end date for meetings to display. To display all meetings, do not enter any dates. Click the "Display Meetings" button.

**Start Date:**  

**End Date:**  

There are no scheduled meetings matching the entered criteria

Click the add button to add a meeting. The following window will appear:

**Advisee Roster - Meeting Details**  

[Advisee Roster](#) > [Advisee Details](#) > [Advisor Meetings List](#) > Meeting Details

**Advisor Meetings For: Carrie F Arrigo**

**Name: \***

**Date/Time: \***   :

**Description:**

**Status:**

**Purpose:**

**Notes:**

A maximum of 4000 characters is accepted in the Notes field. Data which exceeds the maximum length will be truncated.

[Send Meeting Notification To Advisee](#)

Select an advisee in the drop-down box. Enter the date and time of the meeting. You can enter the purpose, as well as notes from the meeting. This is a good way to document the meetings with your advisees. These meeting notes are then viewable by the student on the web.