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# International Student and Scholar Management User Guide

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# 1 Introduction

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This chapter includes provides an overview of the International Student and Scholar Management (ISSM) application, a documentation overview, and lists the user responsibilities.

- [“Introduction to International Student and Scholar Management” on page 1-1](#)
- [“User responsibilities” on page 1-3](#)
- [“Looking ahead” on page 1-3](#)

## Introduction to International Student and Scholar Management

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This chapter contains an overview of ISSM and basic details of user responsibilities such as the technical and regulatory knowledge.

### ISSM overview

ISSM is a web-based visa case management application used by international student and scholar advisors. ISSM helps institutions to manage the international student/scholar office more efficiently and effectively. With ISSM, your international office can maintain SEVIS compliance, work more effectively to attract and retain international students and scholars, and increase productivity and service across all areas of responsibility.

ISSM provides a number of key features and functions, including:

- **Record Navigator:** A one-stop data interface for complete access to international enrollment information. You can produce immigration documents and maintain a case-management history for each student and scholar.
- **Task & Appointment Manager:** A task and scheduling utility that integrates with student/scholar records.
- **SEVIS batching functionality:** Intuitive SEVIS reporting tools that allow you to maintain SEVIS compliance without extra data-entry.
- **Report Writer:** A customizable, self-service, report engine that supports full database auditing.
- **Campus-wide data integration:** Import student/scholar data and configuration settings from any system with CSV or XML output.

## Documentation overview

This manual explains the features of ISSM in a task-oriented manner, using step-by-step instructions to help users understand the application. The manual's chapters correspond to the options on ISSM's main menu page.

An [Appendix A, "ISSM Contact Information"](#) at the end of the manual contains customer service contact information.

Read through the manual at least once before using the software so that ISSM's commands and interface will be familiar. Create sample records, reports, and forms to understand the software before using it in a "live" setting. To this end, the ISSM database contains sample records as a starting point for new users. These records can be deleted at a later time without impacting other data.

In addition to the ISSM User Guide, there are two other documents that ISSM users and IT support staff should use. The Advisor Guide contains an overview of the ISSM workflow, as well as suggestions for software implementation and an overview of the SEVIS batching process. The Technical Guide contains installation and configuration instructions for the ISSM application and overviews of relevant server configuration processes. The figure below illustrates the intended readership for all three books:

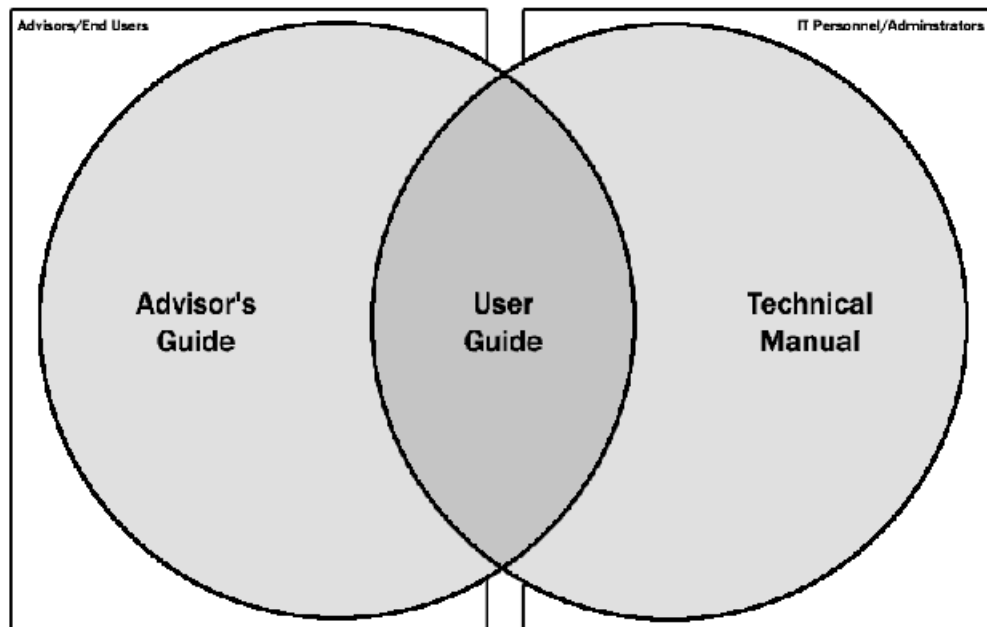


Figure 1: Documentation Overview

## User responsibilities

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Certain assumptions have been made regarding IT personnel and end users (advisors) working with ISSM. They are outlined below.

## Technical and regulatory knowledge

This section discusses the following topics which include Technical, Regulatory and Terminology.

### Technical

ISSM end users should be able to operate a Microsoft Windows workstation. While users are not expected to be system or network administrators, a basic understanding by the user of Microsoft Office and Microsoft Internet Explorer is required. At most schools, an IT staff member will be required to maintain the server and to install upgrades. ISSM Customer Support can provide assistance for technical matters pertaining to the implementation of the ISSM software, but it cannot help with general server/network management or IT questions.

### Regulatory

Users should be familiar with USCIS forms, regulations, and procedures pertinent to foreign student advising. ISSM does not provide interpretations of SEVIS business rules or regulations and its support staff cannot assist users with specific case management questions.

## Terminology

In most cases, student data and scholar data are handled in the same way. As used in this manual, the word “individual” refers to students and scholars collectively. Whenever the procedure for working with a student is different from that of working with a scholar, the differences are noted.

## Looking ahead

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The next chapter explains basic techniques for working with ISSM. Chapter 3 through Chapter 6 contain instructions for using the **Record Navigator**, the **Task and Appointment Manager**, the **Report Writer**, and the **SEVIS Management** console. The final chapter of the book discusses the **Enterprise Manager**, ISSM’s administration tool.

# 2 Getting Started

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This chapter includes information on the ISSM Interface and Application.

- [“Introduction” on page 2-1](#)
- [“Security settings” on page 2-1](#)
- [“Logging in to ISSM” on page 2-2](#)
- [“Logging out of ISSM” on page 2-2](#)
- [“The Main Menu page” on page 2-3](#)
- [“Looking ahead” on page 2-3](#)

## Introduction

---

This chapter contains basic operating instructions for ISSM, an overview of the software’s interface, and an explanation of ISSM features.

## ISSM installation and configuration

For instructions on installing and configuring the ISSM server and application, refer to the *ISSM Technical Guide*.

## Security settings

---

To prevent serious problems, the security of the ISSM application and database must not be compromised under any circumstances whatsoever. Unauthorized users could manipulate the database, gain access to data, delete records, alter user information, import incorrect data, damage the application, send e-mail to students and scholars, or create fraudulent USCIS forms. The ISSM application does not, of itself, provide any additional security to the IIS web server instance, to the ISSM application and/or database server, or the campus network. Consequently, additional security measures should be taken. Observe the security guidelines below and implement intelligent network and security standards to keep the ISSM application secure.

## Logging in to ISSM

---

Use the following instructions to log into ISSM.

1. Open a browser window and go to the ISSM login page. For example: “http://[Servername]/login.asp” where [Servername] is the name of the ISSM application server.

 **Note**

The ISSM login screen may be incorrectly displayed when using Internet Explorer 11. Check to ensure that the *Compatibility View* is turned **off** on the browser. Navigate to **Internet Options>Compatibility View** and de-select the **Display intranet sites in Compatibility View** and **Use Microsoft compatibility lists** options to turn off the compatibility view. ■

2. Enter a user name and password, and click **Login** to log in.

 **Note**

ISSM passwords are case-sensitive. ■

 **Warning**

Disable Internet Explorer’s Auto Complete feature when using ISSM. Having Auto Complete enabled allows any user of the computer to log in to ISSM. Also, be sure that Internet Explorer is set so that it will not remember usernames and passwords. ■

## Logging out of ISSM

---

Use the following instructions to log out of ISSM.

1. Click **LOG OUT** in the upper-right corner of any page in the application. ISSM asks for confirmation.
2. Click **OK** to log out, or click **Cancel** to return to the **Main Menu** of the application.

 **Tip**

Always log out of ISSM after using it. ■

# The Main Menu page

---

The following table lists the main features of the ISSM application:

 **Note**

Users without administrative privileges will not be able to access all of the menu options. [“The Enterprise Manager”](#) explains how to set user permissions. Refer to the *ISSM Technical Guide for Campus DataLink*. ■

Menu Option	Function	Chapter
Record Navigator	Creating, modifying, and deleting records. Generating and approving SEVIS events. Initiating appointments and tasks. Making notes in records. Generating non-SEVIS immigration forms. Searching the database.	<a href="#">“The Record Navigator”</a>
Task and Appointment Manager	Viewing and scheduled appointments and tasks, sorting tasks by type, checking other users’ schedules.	<a href="#">“The Task and Appointment Manager”</a>
Report Writer	Generating pre-formatted and customized reports in Microsoft Excel, Microsoft Word or HTML using data from the ISSM database. Generating Open Doors reports.	<a href="#">“The Report Writer”</a>
SEVIS Manager	Uploading and Downloading SEVIS batches. Printing SEVIS I-20 and DS-2019 forms.	<a href="#">“The SEVIS Management Console”</a>
Enterprise Manager	Formatting forms, menus, and data-entry fields, setting user privileges, maintaining institutional information.	<a href="#">“The Enterprise Manager”</a>

 **Note**

Refer to the *ISSM Technical Guide for Campus DataLink* documentation. ■

## Looking ahead

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At this point, users should have a rough familiarity with the ISSM interface and should now be ready to start using the program. The next chapter, The Record Navigator, explains the procedures for working with student, or scholar, or employee records.

# 3 The Record Navigator

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This chapter includes information on Student and Scholar Records, Forms, Notes, Tasks, and Appointments.

- [“Introduction” on page 3-1](#)
- [“The Record Navigator interface” on page 3-1](#)
- [“General instructions” on page 3-4](#)
- [“Document attachments” on page 3-7](#)
- [“Interactions” on page 3-14](#)
- [“Campus DataLink status” on page 3-20](#)
- [“Archiving, terminating, or deleting records” on page 3-22](#)
- [“Searches” on page 3-23](#)
- [“Performing functions with the record navigator” on page 3-25](#)
- [“Troubleshooting” on page 3-33](#)
- [“Looking ahead” on page 3-35](#)

## Introduction

---

The **Record Navigator** contains student, or scholar, or employee records and forms. It is the primary means of working with database records. Additionally, the Record Navigator is used for creating USCIS forms and for generating SEVIS events. For most end users, the Record Navigator is the portion of ISSM that is used most often.

This chapter contains step-by-step instructions for using the Record Navigator. The *ISSM Advisor Guide* contains an explanation of every field in the Record Navigator, as well as a listing of SEVIS-reportable fields, an index of SEVIS events, and an explanation of **Profile** information.

## The Record Navigator interface

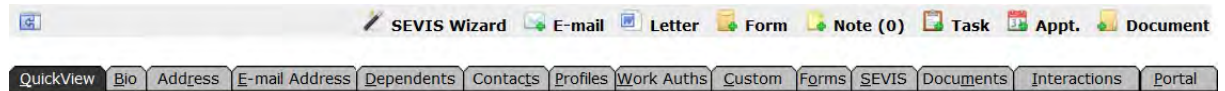
---

The Record Navigator window is divided into two frames. The frame on the left contains a **Quick Search** form and an alphabetized list of individuals in departments that the user has

privileges to view. The right side of the Record Navigator displays the records of students and scholars, and is used to enter information in the ISSM database.

## Record Navigator tabs

The right side of the Record Navigator window contains individuals' records. There are twelve tabs across the top of the frame. They are illustrated in the following image and their functions are explained in the table below.



**Figure 3: Record Navigator header**

Tab Name	Tab Function
Quick View	General information about the individual. Use the other tabs to edit the information contained here.
Bio	The individuals' biographical information: Date of Birth, City of Birth, Country of Birth, Gender, Country of Citizenship, Marital Status, Country of Permanent Residence, Tax ID number, Social Security Number, Driver's License Number, or Driver's License State. There are certain fields in the Bio tab that are only used within ISSM. They are the Campus ID, Admissions ID, Database Status, Department, DataLink Active, and EMail Alerts Suppressed fields. Refer to the <i>ISSM Advisor Guide</i> for a full explanation of Record Navigator fields.
Address	The individual's previous addresses. New addresses can be added and existing ones can be modified. There is no limit to the number of addresses that can be listed.
E-mail Address	The individual's e-mail addresses. New e-mail addresses can be added and existing ones modified. Different e-mail address types can be specified.
Dependents	Information (name, gender, date of birth, relation to individual, country of birth, nation of citizenship, etc.) about any dependents claimed by the individual. New dependents can be added at any time. There is no limit to the number of dependents that can be listed.
Contacts	Contains information about a student's or scholar's faculty and administrative contacts at your institution, as well as emergency contacts in the U.S. and abroad.
Profiles	This tab contains immigration profile information for the individual. New profiles can be added and current ones can be edited at any time.

Tab Name	Tab Function
Work Auths	Work authorization information for the individual.
Custom/Other	Lists custom fields created with the Enterprise Manager. Refer to <a href="#">“The Enterprise Manager”</a> for explanation on the procedure for creating custom fields.
Forms	Information about Immigration forms pertaining to the individual. This information can be changed at any time.
SEVIS	Lists the current individual’s SEVIS events. The contents of this page are taken from the SEVIS Manager. Refer to <a href="#">“The SEVIS Management Console”</a> for instructions on modifying SEVIS events with this tab.
Documents	Lists documents attached to the individual record. The bottom table on the page shows the documents attached to the record with their associated context or source (i.e. Dependents, Profile, Contacts, Portal).
Interactions	Lists all interactions associated with an individual’s record, including notes, tasks, appointments, ad-hoc e-mail, and e-mail blasts and alerts. Interactions are listed in chronological order with the most recent interaction listed first. The notes display the text and characters in a paragraph format.
Portal	This tab lists all the supporting documents that the individual has submitted via the International Student Portal to meet their university requirements. It also lists all the events the individual has signed up for via the International Student Portal. The tab also allows a user to manage the individual’s International Student Portal account. Lastly, this tab allows a user to view Custom fields defined specifically for the International Student Portal.

# General instructions

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The subsections below contain step-by-step instructions for working with frequently-used features in the Record Navigator. For a workflow-based overview of using the Record Navigator, refer to the *ISSM Advisor Guide*.

## Modifying records

Use the following instructions to edit information in individual records.

1. From the Main Menu, click **Record Navigator**.
2. Open the individual's record.
3. Click the tab containing the information being updated.
4. Click **Edit Info** corresponding to the data that is being altered, or click **Add New** to add a new data item.
5. Make changes to the record and click **Save**; click **Cancel** to return to the previous page without saving the changes.
6. Click **Delete** to delete a data item.

### Note

Do not assign a SEVIS ID number to an individual unless the number has been issued by the SEVIS Real-Time Interface (RTI); when an individual's data is first submitted to SEVIS, the BCIS will assign a SEVIS ID. ■

## SEVIS event wizards

The **Create Student** and **Create Exchange Visitor** wizards, explained in the section below, can either be used for the completion of **Create Student** or **Create Exchange Visitor** events or for the input of new records by data-entry personnel.

Use the following instructions to work with an event wizard.

1. From the Main Menu, click **Record Navigator**, then select a student.
2. Click **SEVIS Wizard** at the top of the Record Navigator window.

The **SEVIS Wizard** menu appears and displays a list of all available SEVIS events for the student or scholar. Events that are not available under SEVIS business rules are not selectable (they are “grayed out”). For example, for a SEVIS - Pending student without a SEVIS ID the Update Program Information event is not selectable. This is because this event is only available for students who are already in the SEVIS system.

3. Click the name of the event to open it.
4. Fill in the details of the event, following the SEVIS Wizard instructions for required or missing information.
5. Click **Save**.

This event may be modified from the **SEVIS** tab or from the SEVIS Manager like any other SEVIS event.

## Create student/create exchange visitor wizards

The wizard used when creating new students or scholars differ from the other SEVIS event wizards in that they can have templates applied to them and their interfaces have been designed for users who are more familiar with I-20 or DS-2019 forms than with ISSM **SEVIS Event Modification** screens. It can be accessed when first creating a new record, or alongside the other events in the **SEVIS Wizard Menu**.

The event wizard page contains two sections. The first section, **Prerequisite Information**, contains seven ISSM-only fields: **Profile Type**, **Profile SubType**, **Profile Status**, **Full-Time Status** (for F-1 students), **Campus ID**, **Department**, and **DataLink Active status**. With the exception of the SEVIS-required Profile Type and Full-Time Status fields, all of these fields are only used within ISSM. For a full explanation of these fields, refer to the *ISSM Advisor Guide*.

The second section of the page, **Fill in F/M Student Information (Fill in Exchange Visitor Information** for J-1 exchange visitors) contains the fields normally found in the I-20 form (DS-2019 form for J-1 exchange visitors). Fill in the details of the form and click through to the other pages of the Wizard, which contain options for adding **Address**, **Site of Activity** (if applicable), and **Dependent** information. Information can be left out of the wizard if it is not available.

After the wizard is filled in, ISSM displays a list of any SEVIS events that are generated by the information entered into the wizard. These events can be modified, suppressed, and added to batches just like any other SEVIS events.

## Creating forms

The general procedure for creating a non-SEVIS form are listed below. For instructions on working with SEVIS forms, refer to [“Generating a SEVIS I-20 or DS-2019 form”](#) for more information.

Use the following instructions to create a new form for an individual in the ISSM database.

1. Open the individual's record and click the **Forms** tab.
2. Click **Add New**.
3. Click the **Form Type** list box and select the type of form to create.
4. Click the **Current/Historical** list box:
  - Current: New form.
  - Historical: Copy of an old form that will be used for record keeping purposes.
5. Select the type of form and click **Continue**. The Select Data for New Form page displays, which provides the options to assign templates and pre-set information for the form.
6. Select the appropriate options for the selected form. If all items are left blank or set to their default values, the new opened form contains only information from the individual's record. The following table lists the options that may be available on the page, depending on the form that you have selected.

Option Name	Function
Description	Explains the purpose of the form. Some forms only have one option in this menu.
Select Campus	Selects the school or campus.
Select Signer	Selects the Designated School Official (DSO) creating the form. This individual will also be listed as the signer of the form when it is printed.
Select Employer	Selects the name of the employer for I-129 and I-140 forms. Use the Enterprise Manager to create a list of employers.
Select Form Template	Chooses which user-created templates, if any, will be used in creating the form.

 **Note**

The contents of the drop-down menus listed in previous table can be set using the Enterprise Manager, which is discussed in [“The Enterprise Manager”](#).

7. Click **Continue** to edit the form, or click **Cancel** to return to the individual's record.

8. Fill in the form. It will be pre-populated with information contained in the selected template.
9. Scroll to the bottom of the page and click **Save** when finished.
10. ISSM will open the **PDF Creation Complete** page. From there, users can view the completed form by clicking **View PDF**, or return to the Record Navigator.

## Document attachments

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The document attachment feature enables users to attach various types of files to an individual's record. This feature is located under the **Documents** tab, but documents may also be attached to an individual within the context of the **Profile**, **Work Auths**, **Dependents**, **Contacts**, and **Portal** tabs.

Acceptable file extensions for document attachments are listed below:

Extension	Description
.txt (TXT)	Plain text document
.rtf (RTF)	Rich text document
.xls (XLS)	Microsoft Excel worksheet (1997 - 2003)
.xlsx (XLSX)	Microsoft Excel worksheet
.doc (DOC)	Microsoft Word document (1997 - 2003)
.docx (DOCX)	Microsoft Word document
.ppt (PPT)	Microsoft PowerPoint presentation (2003 and before)
.pptx (PPTX)	Microsoft PowerPoint presentation
.pdf (PDF)	Portable Document Format
.jpeg (JPEG)	Compressed image format
.jpg (JPG)	Compressed image format
.gif (GIF)	Compuserve's Graphic Interchange Format
.bmp (BMP)	Microsoft Windows bitmap image format
.tif (TIF)	Tagged Image File Format

Extension	Description
.tiff (TIFF)	Tagged Image File Format
.png (PNG)	Portable Network Graphics format
.htm (HTM)	Hypertext Markup Language
.html	Hypertext Markup Language
.zip	Compressed file format
.rar	Rar archive file format
.msg (MSG)	Microsoft Outlook message file format

While the Documents tab is the main location to view and manage all documents for an individual, several other tabs in the Record Navigator enable tab specific document management. Each attached document is linked with a “context type” to describe its association with the individual’s record. Those tabs, with their associations and functional steps, are described below.

## Attaching documents to an individual’s record

Users must have a minimum of *Read/Write ISSM* permissions for access to full document management features (including view, edit/update, add, and delete).

### Document attachments via the Documents tab

A context type of General will automatically be associated with documents attached via the **Documents** tab.

Use the following instructions to attach a document to an individual’s record via the Documents tab.

1. Click **Record Navigator** and open the individual’s record.
2. Click **Documents** tab to open the **Manage Documents** page.
3. In the **Select Document** field, click **Select** to browse for and attach the desired document file.
4. Enter a **Document Title** (required). This does not have to be the same as the name of the file selected.
5. Enter a **Keyword** (optional). This can be used to later search for documents using common keywords.

6. Click **Save Document** to complete the attachment process. If you wish to clear all fields and cancel the attachment, click **Reset**.

## Document attachments via the Bio tab

A context type of General will automatically be associated with documents attached via the **Bio** tab. A numeric value in the **Add Document** hyperlink indicates the number of documents current attached within the context of the **Bio** tab.

Use the following instructions to attach a document to an individual's record via the Bio tab.

1. Click **Record Navigator** and open the individual's record.
2. Click **Bio** tab, then click **Add Documents** (hyperlink) to open the **Manage Bio Documents** page.
3. Follow steps 3-6 described in the Document Attachments via the Documents tab section.

## Document attachments via the Dependents tab

A context type of Dependents will automatically be associated with documents attached via the **Dependents** tab. A numeric value in the Add Document hyperlink indicates the number of documents current attached for that particular Dependent. Documents can be added to each individual dependent. The page header includes the Dependent's first name and last name.

Use the following instructions to attach a document to an individual's record via the Dependents tab.

1. Click **Record Navigator** and open the individual's record.
2. Click **Dependents** tab, then click **Add Documents** (hyperlink) within the selected Dependent's summary display to open the **Manage Dependent Documents** page.
3. Follow steps 3-6 described in the Document Attachments via the Documents tab section.

## Document attachments via the Contacts tab

A context type of Contacts will automatically be associated with documents attached via the Contacts tab. A numeric value in the Add Document hyperlink indicates the number of documents current attached for that particular contact. Documents can be added to each individual contact. The page header includes the contact's first name and last name.

Use the following instructions to attach a document to an individual's record via the Contacts tab.

1. Click **Record Navigator** and open the individual's record.
2. Click **Contacts** tab, then click **Add Documents** (hyperlink) within the selected Contact's summary display to open the **Manage Contact Documents** page.
3. Follow steps 3-6 described in the Document Attachments via the Documents tab section.

## Document attachments via the Profiles tab

A context type of Profile will automatically be associated with documents attached via the Profile tab. A numeric value in the Add Document hyperlink indicates the number of documents current attached for that particular profile. Documents can be added to each individual profile. The page header includes Profile Status, Profile Type, Program (primary major), and Profile Start Date.

Use the following instructions to attach a document to an individual's record via the Profiles tab.

1. Click **Record Navigator** and open the individual's record.
2. Click the **Profiles** tab, then click **Add Documents** (hyperlink) within the selected Contact's summary display to open the **Manage Profile Documents** page.
3. Follow steps 3-6 described in the Document Attachments via the Documents tab section.

## Document attachments via the Work Auths tab

A context type of Work Authorization will automatically be associated with documents attached via the **Work Auths** tab. A numeric value in the Add Document hyperlink indicates the number of documents current attached for that particular Work Auths record. Documents can be added to each individual work authorization. The page header includes Work Auth Type, Work Auth Start Date, and Work Auth End Date.

Use the following instructions to attach a document to an individual's record via the Work Auths tab.

1. Click **Record Navigator** and open the individual's record.
2. Click **Work Auths** tab, then click **Add Documents** (hyperlink) within the selected Contact's summary display to open the **Manage Work Auths Documents** page.
3. Follow steps 3-6 described in the Document Attachments via the Documents tab section.

## Document attachments via the Portal tab

A context type of *Portal* will automatically be associated with documents approved by the administrator via the **Portal** tab. Documents that reside on the **Portal** tab with any status other than *Approved*, will not show on **Documents** tab.

## View, edit, delete, search, or sort documents

The **Documents** tab will display a list of all available documents, with all Context Types, for an individual. Based on Context Type and potentially sub-record (i.e. specific dependent, contact, profile, or work auth record), documents are also available for view and management within each of the individual tabs listed earlier in this chapter.

### View document

Enter Document Management page (follow steps 1 - 2, described earlier for each of the relevant tabs). Click **Document Title** to open or view document. Maximize, minimize, and/or close document using normal windows commands.

### Edit document

Enter Document Management page (follow steps 1 - 2, described earlier for each of the relevant tabs). Click **Edit** at end of the row listing the document to be edited. An edit pane

appears under the document to be edited. The available edit options are Document Title, Keyword, and the option to replace the document itself.

 **Note**

The **Select Document** field appears blank because the document has been previously uploaded and saved in the ISSM database (hence, does not display a document path). ■

Click **Cancel** to exit edit mode without saving, or click **Save Changes** to accept the edits and exit edit mode.

## Delete document

Enter Document Management page (follow steps 1 - 2, described earlier for each of the relevant tabs). Click **Delete** at end of row listing the document to be deleted. A pop-up dialog box will require confirmation for this action. Click **Cancel** to exit without deleting, or click **Ok** to continue delete action and return to the Document Management page.

 **Note**

Document deletion is non-reversible. ■

To delete multiple documents, select multiple documents using their corresponding check boxes in each row (to delete all documents, use the select and deselect all options, with master check box in the header row). Click **Delete Selected** (hyperlink) located in the same column, below the lower final check box. A pop-up dialog box will require confirmation for this action. Click **Cancel** to exit without deleting, or click **Ok** to continue delete action and return to the Document Management page.

 **Note**

Document deletion is non-reversible. ■

## Search or sort

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Enter Document Management page (follow steps 1 - 2, described earlier for each of the relevant tabs). By default, the list of available documents appears in descending chronological order of the “Last Updated” document. Click any of the column (hyperlink) headings to sort the list by that column in ascending order. Click the same heading again to reverse the order. Each heading, except Context Type, is accompanied by a search window for customized searches of individual documents or multiple documents sharing similar attributes (such as Keyword, Updated By, or Context Type). While Context Type only accepts selection via dropdown menu, all other columns named here accept data entry for customized searches. Each search window is also accompanied by a Filter icon. Click the Filter icon to display a transparent pop-up menu of filter options to apply using the contents from its associated search window.

 **Note**

Context Type is only active as a Search and Sort column in the Documents tab. All other document attachment related tabs listed in this chapter, by default, only contain documents associated with their own Context Type. ■

Available Search/Sort active columns and headings are listed below:

Column	Sortable	Includes Search Window
Title	Yes	Yes
Field Name	Yes	Yes

Column	Sortable	Includes Search Window
Keyword	Yes	Yes
Last Updated	Yes	Yes
Updated By	Yes	Yes
Context Type	Only on Documents tab	Only on Documents tab

## Interactions

This section provides you with more information about the Interactions tab.

**Interactions Log**

The list below contains the history of all interactions (notes, tasks, appointments, e-mails) with the individual created within ISSM.

Type	Date	Advisor	Status	Category	Summary
Appt.	08/02/2012	Advisor Last Name, Advisor First Name	Active	Education Problem	Change of Major
Blast	08/02/2012	Advisor Last Name, Advisor First Name	E-mail Not Sent	Welcome to Ellucian University!	Welcome to Ellucian University!
E-mail	08/02/2012	Advisor Last Name, Advisor First Name	E-mail Not Sent	Your I-20 is ready to be picked up!	Your I-20 is ready to be picked up!
Note	08/02/2012	Advisor Last Name, Advisor First Name	N/A	Academic Problem	Stefano came into the office to discuss changing his major from Biology to Engineering.
Task	08/02/2012	Advisor Last Name, Advisor First Name	Active	Student Document New	Stefano needs a new I-20 with the updated Major information

Change page: ⏪ ⏩ ⏴ Prev Next ⏵ ⏹ Page 1 of 1, items 1 to 5 of 5.

**Figure 4: Interactions tab**

The **Interactions** tab allows you to view all interactions between the advisor and the student or scholar. There are a number of different types of interactions:

- Notes
- Task
- Appointment
- Ad-Hoc E-mail
- E-mail Blast
- E-mail Alert.

The information on the **Interactions** tab pertaining to notes, tasks, and appointments can be used in conjunction with the Task and Appointment Manager to keep track of changes

to an individual's status, location, and personal information, as well as a way to keep track of important deadlines.

From the **Interactions Log** screen, users with proper permissions can obtain the history of all interaction types with the student or scholar. Users can filter this information by **Type**, **Date**, **Advisor**, **Status**, **Category**, and **Summary**.

## Making notes in records

Follow the instructions below for inserting notes in records and modifying existing notes. Working with notes in ISSM requires that the user has **Advisor Notes Access** permission, which can be assigned to users with the **Enterprise Manager**. Refer to "[Setting user permissions](#)" for instructions on setting user permissions.

### Creating a note

Use the following instructions to add a new note to an individual's record.

1. Click **Record Navigator** and open the individual's record.
2. Click the **Note** icon on the **Record Navigator** tool bar to open the **Advisor Notes System** window. Only users with *Advisor Notes Access* permissions can use this feature.
3. Click **Add New** to create a new note.
4. Enter a category and description for the note, or choose one from the **Category** and **Description** drop-down menus.

#### **Note**

The contents of the **Category** and **Description** drop-down menu can be set using the Enterprise Manager, which is covered in "[The Enterprise Manager](#)". ■

5. Enter the text of the note in the **Text** field.
6. Click **Save** to return to the **Advisor Notes System**. The new note will appear in the list of existing interactions on the Interactions Log screen.
7. Close the window to return to the Record Navigator.

## Modifying a note

Use the following instructions to edit an existing note in an individual's record.

1. Go to the **Record Navigator** and open the individual's record.
2. Click the **Note** icon on the **Record Navigator** tool bar.
3. Locate the note you want to modify and click the corresponding **Edit Info**.
4. Make changes to the note.
5. Click **Save** to return to the **Advisor Notes System**. The changes to the note will be reflected in the individual's record.
6. Close the window to return to the **Record Navigator**.

### Note

You can also make changes to a Note by clicking the **Note** icon from this list of interactions on the Interactions Log screen associated with the record. ■

## Working with tasks

Follow the directions below to create new tasks, edit existing ones, or deleting tasks that are no longer necessary. When tasks are scheduled with the Record Navigator, they automatically appear in the Task and Appointment Manager.

### Creating a new task

Use the following instructions to schedule a new task.

1. Open the student's record from the **Record Navigator** and click the **Task** icon from the Record Navigator tool bar. The Add New Task page appears.
2. Fill in the appropriate fields. The following table explains the contents of the New Task page. Fields with names written in *italics* only appear when the task is edited, not during the initial task creation.

Field Name	Description
Client Name	The name of the student or scholar for whom the task is being performed.
Department Name	The name of the ISSM department that "owns" the student or scholar record.

Field Name	Description
Status	The status of the task: <i>Active</i> , <i>Complete</i> , or <i>Deleted</i> .
Source	The manner in which the student or scholar contacted the office (E-Mail, Phone, Walk-In, etc.) to request the task. These values can be changed with the Enterprise Manager.
Task Type	The task's type. These values can be changed with the Enterprise Manager.
Note	Staff notes made at the time the task was initiated. Limited to 500 characters.
Send e-mail upon task completion?	When checked, ISSM will send e-mail to the student or scholar when the task's status is changed from <i>Active</i> to <i>Complete</i> .
E-mail type to send Task to	The e-mail address type(s) to which the task is to be sent. This field will have the list of e-mail address types that have been defined. More than one type can be selected and the task will be sent to the e-mail addresses associated with those e-mail address types.
E-mail Message for Client	The text of the e-mail message sent to the student or scholar upon completion of the task.
Intake Advisor	The name of the user who created the task.
Advisor	The name of the user assigned to the task.
Instructions for Processor	Instructions for the personnel processing the task. Limited to 255 characters.
Processor	The surname of the processor assigned to this task.
Pick Up	How the student or scholar will pick up the task (E-Mail, Walk-In, etc.) once it has been completed. These values can be changed with the Enterprise Manager.
Date Started	The date on which the task was created, in mm/dd/yyyy format.
Date Required	The date by which the task must be complete, in mm/dd/yyyy format.
Date Completed	The date on which the task was completed, in mm/dd/yyyy format.

- Click **Save** when finished, or click **Cancel** to return to the previous screen without making any changes. A confirmation screen reviewing the task's details will appear. If desired, the user can print out a copy of the page to give to the student or scholar as a receipt.

4. Click **Record Navigator** to return to the Record Navigator.

## Modifying a task

Use the following instructions to review or edit a task.

1. Open the individual's record and click the **Interactions** tab.
2. Locate the task from the list of interactions on the Interactions Log screen and click the corresponding **Task** icon. A View Tasks page opens in the frame on the left.
3. Make any necessary changes to the task.
4. Click **Save** when finished. The individual's record and the calendar will reflect the changes. Click **Cancel** to return to the previous page without making any changes.

## Completing or deleting a task

Use the following instructions to mark a task as “complete,” or to delete it.

1. Open the individual's record and click the **Interactions** tab.
2. Locate the task in from the **Interactions Log** screen and click the corresponding **Task** icon. This opens a View Task page in the frame on the left.
3. Set the **Status** drop-down menu to *Completed* or *Deleted*.
4. Click **Save** to update the record, or click **Cancel** to return to the previous screen without making any changes. If the option was selected during creation of the event, an e-mail message will be sent to the individual notifying him/her that the task has been completed.

### Note

This procedure only applies to Tasks and Appointments. Notes cannot be deleted. Tasks can also be reviewed, edited, marked as Complete or Deleted using the Task and Appointment Manager, which is explained in [“The Task and Appointment Manager”](#). ■

## Working with appointments

The **Record Navigator** can be used to schedule appointments with individuals. Like notes and tasks, appointments created with the **Record Navigator** appear in, and can be modified with, the Task and Appointment Manager. Appointments associated with an individual record can also be viewed from the **Interactions Log** screen on the **Interactions** tab.

## Creating a new appointment

Use the following instructions to schedule a new appointment.

1. Open a record.
2. Click the **Appt.** icon on the **Record Navigator** screen to open the **Add New Appointment** screen.
3. Use the **Source** drop-down menu to note the way the appointment was made. For example, E-Mail, Mail, Phone, Walk-In, etc.

### **Note**

Choosing *E-Mail* does not send an e-mail reminder to an individual regarding his or her upcoming appointment. ■

4. Note the type of appointment being scheduled either by typing it in to the **Appointment Type** field or by choosing one from the drop-down menu.
5. Make any necessary comments regarding the appointment in the **Appointment Note** field.
6. Choose the name of the person with whom the individual is meeting from the **Meeting with** drop-down menu.
7. Set the date of the appointment by entering it in the **Date Begins** field in the MM/DD/YYYY format.

### **Note**

Clicking **Calendar** next to the **Date Begins** field opens a window displaying the current month. Clicking **Check Advisor's Availability** will display a list of appointments that have been scheduled with the advisor selected with the **Meeting with** drop-down menu. ■

8. Choose the starting and ending times for the appointment with the **Time Begins** and **Time Ends** drop-down menus.
9. Click **Save** to save the information and proceed to the **Appointment Detail** screen or click **Cancel** to return to the previous screen without making any changes.
10. From the Appointment Detail screen, click **Printable Version** to open a new window containing a confirmation of the appointment that can be printed and given to the student or scholar as a reminder. Click **Back to Task Manager** to show the scheduled appointment in the Task and Appointment Manager. Click **Record Manager** to return to the student or scholar's record.

## Modifying and deleting appointments

Use the following instructions to modify or delete an appointment that has been previously scheduled.

1. Open a record.
2. Locate the appointment from the list of interactions on the **Interactions Log** screen and click the corresponding **Appt.** icon. A View Appointments page opens in the frame on the left.
3. Make changes to the appointment and click **Save** when finished. Once the information you entered is saved, you have the option to print a reminder or go back to the student record.
4. To delete an appointment, go to the **Edit Appointment** Window, set the **Status** drop-down menu to *Deleted* and click **Save**. The appointment is removed from the **Interactions** tab.
5. Click **Cancel** to return to the **Record Navigator** without making any changes.

### Note

Appointments can also be modified and deleted with the Task and Appointment Manager. ■

## Campus DataLink status

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When individuals are DataLink Active, their personal data is no longer updated manually with ISSM; it is updated with data from an outside source by the Campus DataLink instead.

Use the following instructions to set the DataLink Active status of a record.

1. Open the record.
2. Go to the **Bio** tab.
3. Click **Edit Info**.
4. Scroll to the **ISSM Settings** section and locate the **DataLink Active** field. If the box is checked, then the record is DataLink Active, meaning that the DataLink Active fields in it can only be updated with the **Campus DataLink**. If the box is unchecked,

then the record can be updated with the Record Navigator. This setting can be toggled back and forth as needed.

 **Note**

The **DataLink Active** field in the header has been modified to a check box where the user can toggle between *Yes* and *No* with a single click to avoid multiple steps, and directly change the DataLink Active state for the student or scholar. ■

5. After setting the DataLink Active status, scroll to the top of the page and click **Save** to update the record.

# Archiving, terminating, or deleting records

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In ISSM, archived, terminated, and deleted records are defined as follows in the table below. This function allows users with permissions to permanently delete all records with a database status of “deleted”. For additional details on the Delete Record function, refer to [“The Enterprise Manager”](#).

Record Type	Description
Archived	The individual has graduated or completed his or her course of study.
Terminated	The individual has left the school for a personal, academic, or disciplinary reason.
Deleted	The individual’s record was entered in error or is a duplicate record, and is therefore no longer needed.

Use the following instructions to archive, terminate, or delete an individual’s record.

1. Open a record.
2. Click the **Bio** tab.
3. Click **Edit Info**.
4. Scroll down to the **ISSM Settings** section and change the individual’s **Database Status** to *Archived*, *Terminated* or *Deleted*.
5. Click **Save** to update the record.

 **Note**

The Quick Search can only search for one Database Status at a time. Archived, Terminated, or Deleted records will not appear unless the user explicitly searches for them. ■

# Searches

This subsection contains instructions for performing searches in the Record Navigator. There are three kinds of searches that can be performed:

Type of Search	Description
Quick Search	Search for a group of students or scholars based on Last Name, First Name, E-mail, Campus ID, SEVIS ID, Date of Birth, Database Status, Profile Type, Profile SubType, and Profile Status.
Advanced Search	Search for a group of students or scholars based on specific values contained in the Record Navigator.
Reports	Outputs the results of a Report Writer report to a list of students or scholars.

## Note

Individuals with exclamation mark (!) icons next to their names in the list of search results have recently been sent e-mail alerts. ■

## Quick search

The **Quick Search** form locates individuals' records based on a limited number of frequently-accessed values. Refer to the following table for a listing of fields in the **Quick Search** form.

Field Name	Field Function
Last Name	Last Name, as entered in the Passport Name section of the Bio tab. Entering a single letter or a series of letters will return a list of individuals whose last names begin with those letters. For example, entering "ka" will return a list of individuals whose last names begin with "ka."
First Name	First Name, as entered in the Passport Name section of the Bio tab. Entering a single letter will return a list of individuals whose first names begin with that letter. For example, entering "sa" will return a list of individuals whose first names begin with "sa."
Date of Birth	Date of Birth in mm/dd/yyyy format.
SEVIS ID	SEVIS ID. Entering a single character or a string of characters will return a list of individuals whose SEVIS ID numbers begin with that string. For example, entering "N123" will return a list of individuals whose SEVIS ID numbers begin with "N123."

Field Name	Field Function
Campus ID	Campus ID number. Entering a complete Campus ID will return a single individual. Entering a string of characters will return a list of individuals whose Campus ID numbers begin with that string. For example, entering “29” in this field will return a list of individuals whose Campus ID number begins with “29.”
Database Status	Searches for active, archived, deleted, or terminated records.
E-mail	E-mail as entered in the E-mail Address tab. Entering a single letter or a series of letters will return a list of individuals who have at least one e-mail address beginning with those letters. For example, entering “abc” will return a list of individuals who have at least one e-mail address beginning with “abc.”
Profile Type	Filters the list of students and scholars by Profile Type.
Profile SubType	Filters the list of individuals by Profile SubType.
Profile Status	Filters the list of individuals by Profile Status.

 **Note**

Using multiple fields will narrow the search. The Quick Search uses an “AND” filter. For example, entering “ka” in the Last Name field and F-1 in the Profile Type field will return a list of F-1 records where the last name begins with “ka.” To perform “OR” searches (i.e. F-1 records where the last name begins with “ka” or “le”), use the Advanced Search instead.

When refining searches, the only accepted “wildcard” character is the percent symbol (%). Use it on its own to return any value in a given field or use it with other characters to represent a single character or a group of characters at the beginning, in the middle, or at the end of a data string. ISSM allows hyphens (-) in individuals’ names and in the First Name and Last Name fields of the Quick Search and Advanced Search windows.

To return a list of all the individuals in the ISSM database, leave all of the fields in the **Quick Search** form blank, click **Search**, and then click **Show All** at the top of the list of records. ■

## Advanced search

ISSM can perform in-depth searches of the database, which can locate information contained in most fields in the Record Navigator.

Use the following instructions to perform an Advanced Search.

1. Open the **Record Navigator** and click **Advanced Search**, which is located near the Quick Search portion of the ISSM screen. The Report Search Parameters page displays.

 **Note**

The Advanced Search interface mirrors that of the Report Writer's Custom Report Generator, which is documented in [“The Report Writer”](#). ■

2. Select the parameters that define the advanced search. For assistance on setting the parameters, refer to [Step , “Step 5: Set search parameters \(filters\) for a new report”](#) in [“The Report Writer”](#).
3. Scroll to the bottom of the page and click **Save**. ISSM returns to the Record Navigator and displays a list of individuals matching the search criteria.

## Report results

If there are any pre-made or custom reports in the Report Writer the Record Navigator can present the results of those reports as search results.

Use the following instructions to output the results of a report to the Record Navigator.

1. Open the **Record Navigator**.
2. In the Quick Search section of the page, click the **Retrieve Report** drop-down list and select the report. ISSM then displays all of the individuals in the selected report.

## Performing functions with the record navigator

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The sections below explain some tasks that users will frequently perform with the Record Navigator. For a complete set of SEVIS event generation instructions, refer to the *ISSM Advisor Guide*.

## Creating new student or scholar records

There are three ways in which records are created in ISSM:

- New records are imported from a campus database system using the **Campus DataLink**. These records could come from the campus system, the ISSM Data Integrator Tool, and International Scholar Dossier.

 **Note**

The ISSM Data Integrator Tool and International Scholar Dossier are separate tools. For information about these tools, please call Ellucian Professional Services at 1-610-578-7605. ■

- Users manually create new records in ISSM with the Record Navigator.

 **Note**

For information about Campus DataLink, refer to the *ISSM Technical Guide*. ■

Use the following instructions to create a new student or scholar record with the Record Navigator.

1. Go to the **Record Navigator**.
2. Locate the **Quick Search** and click **Add Individual**.
3. Fill in the relevant data; any fields left blank can be filled in at a later time.
4. Click **Continue** to return to the Record Navigator page. The new individual's record can now be viewed and modified. Click **Cancel** to return to the previous screen without adding the individual.

 **Note**

If the individual does not have both a first name and a last name, enter his or her name in the **Last Name** field, otherwise the record will not be created. The **Last Name** field is required for all records. ■

## Generating a SEVIS I-20 or DS-2019 form

This subsection contains instructions for uploading events to SEVIS to request I-20/DS-2019 forms. While the step-by-step instructions apply specifically to the **Create Student** and **Create Exchange Visitor** events, the underlying business process applies to all SEVIS batch transmissions in ISSM, and easily transfers from one event to another without any major changes.

### Initial I-20/DS-2019 forms

The following steps assume that the user has a valid SEVIS ID and that he/she has permission to generate SEVIS events and to upload SEVIS batches. Contact the ISSM administrator to acquire this permission level. Further, the assumption has been made that the ISSM server and application have been properly configured for SEVIS batching.

Use the following instructions to acquire an Initial Enrollment SEVIS I-20/DS-2019 form for a student or scholar.

1. Create a student or scholar record in the manner described in [“Creating new student or scholar records”](#).
2. Click the **Profile** tab and set the individual’s Profile Status to *SEVIS - Pending* or *SEVIS - Active*.
3. Enter valid dates for the **Profile Start Date** and **Profile End Date** fields; the Profile Start Date must have a value after tomorrow’s date.
4. Save the information in the **Profile** tab.
5. Go to the **SEVIS** tab. There will be a **Create Student** (F-1 records) or **Create Student** (J-1 records) event waiting in the **Section 1: Pending Event(s)** section of the page.
6. Click the **Edit** link just to the right of the name of the pending event.

The data fields in the event will be populated with information from the student or scholar’s record. The fields with names written in boldface red text are required by SEVIS. They will also have red exclamation mark icons (!) next to them. The event cannot be uploaded without valid data in those fields. Fill in all of the required fields, scroll to the bottom of the page, and click SAVE.

7. ISSM will return to the **SEVIS** tab. If the event has a green circle next to it, it is *complete* and ready for upload. Check the **Approve** and **Request I-20/DS-2019** check boxes to the right of the event and then click **Approve Events** to add it to a batch.

If the event has a red circle next to it, then it is incomplete and not yet ready for upload because of missing information, an ISSM configuration problem, or a bad CIP code.

8. Go back into the event by clicking the **Edit** link; there will be an explanation of the error. Refer to [“Troubleshooting”](#) or go to ActionWeb and search for information.
9. After fixing the error(s) with the event, scroll to the bottom of the page and click **Save** to update the event. If it is complete, add it to a batch. If it is incomplete, repeat the previous step.
10. After the event has been added to a batch, return to the ISSM Main Menu and then go to the **SEVIS Management** console.
11. Click **Upload Manager** in the upper-right corner of the screen.
12. The batches in the upload manager will be listed by number and date. Check the **Upload** check box and click **Upload Events** to upload the batch.

There will be a brief pause during the upload. When the upload is complete, ISSM will issue a status message indicating whether the upload was complete. Once the batch has been uploaded, it will be ready for download within 24 hours. Schools in SEVIS batch testing may find that the batches are available for download as quickly as an hour after upload.

13. To download the I-20 forms requested during the batch upload, go to the **SEVIS Management Console's** Download Manager (**Main Menu > SEVIS Management > Download Manager**). Then, locate the batch, check the **Download** check box, and then click **Download Events**. There will be a pause during the download, followed by a status message indicating whether the batch file was ready for download.
14. Once the batch has been downloaded, look for the batch in the **Downloaded Events** section of the SEVIS Download Manager. Click the **View Details** link to view the contents of the batch.
15. Click **View PDF** link next to each event in the batch to view the downloaded SEVIS I-20/DS-2019 form. From there, the form can be printed out and given to a student or scholar.

 **Note**

The above process does not include all of the ways that the SEVIS batch process can be handled using ISSM. It is merely the quickest way that an advisor can acquire an I-20/DS-2019 form for a student or scholar. For information on working with larger batches, suppressing events, and archiving downloaded SEVIS forms to the student or scholar's record, refer to [“The SEVIS Management Console”](#). ■

## Continuing I-20/DS-2019 forms

In terms of step-by-step instructions, the process for acquiring a continuing I-20/DS-2019 form is essentially the same as the process of acquiring an initial I-20/DS-2019, as outlined in the previous section. When working with continuing students or scholars, the **Create Student** event will not be used. Other events, such as the **Update Personal Information** or **Add New Dependent** (which are two of approximately fifteen batch events), will be generated as the relevant fields are updated in student or scholar records. Refer to the *ISSM Advisor Guide* for a detailed list of how and why each SEVIS event is generated.

 **Note**

Remember to check the **Request I-20/DS-2019** box in the Record Navigator **SEVIS** tab when requesting an I-20 or DS-2019 form. ■

## Entering a dependent into SEVIS

Dependents are entered into SEVIS using the **Add New Dependent (F-1)** and **Dependent - Add (J-1)** events. The information about dependents can be updated using the **Update Dependent Personal Information (F-1)** and **Dependent - End (J-1)** events. The

**Terminate Dependent** (F-1/J-1) events remove dependents from the parent or spouse's SEVIS record.

## Add new dependent or dependent - add

Use the following instructions to generate an Add New Dependent or Dependent - Add event.

1. Set the dependent's Status to *SEVIS - Active* or *SEVIS - Pending*.
2. Set the dependent's **Immigration Status** to F-2 (if the primary record is an F-1) or J-2 (if the primary record is a J-1).

The Add New Dependent or Dependent - Add event will appear. Be sure to request a new I-20/DS-2019 when adding a new dependent to SEVIS by checking the **REQUEST I-20/DS-2019** check box.

### Note

Dependents can also be added as part of the Create Student event. ■

## Transferring RTI student or scholars to ISSM

Since SEVIS does not provide an export utility from the RTI, student or scholar records entered into the RTI must be manually entered into ISSM. When doing this, remember to do the following:

1. Enter the student or scholar's **SEVIS ID** into his/her record. The **SEVIS ID** field is located under the **Bio** tab.
2. Set the student or scholar's **Profile Status** to *SEVIS - Pending* (if the student is still in *initial* status) or *SEVIS - Active*.
3. After the record is made *SEVIS - Pending* or *SEVIS - Active*, a **Create Student** (F-1) or **Create Exchange Visitor** (J-1) event will appear under the **SEVIS** tab. Since this event is no longer necessary, suppress it by clicking the corresponding **Suppress** link.
4. Be sure that the information in ISSM matches the information in the RTI, since Any information uploaded to SEVIS in subsequent batches will overwrite the RTI.
5. Update the student or scholar's record in the usual manner; SEVIS events will be organically generated as the relevant SEVIS-reportable fields are updated. These events can be uploaded to SEVIS.

## Giving students duplicate forms (SEVIS and non-SEVIS)

Whenever a user creates a non-SEVIS form in ISSM, the form is archived under the Record Navigator's Forms tab.

Use the following instructions to print a duplicate copy of a form.

1. Open a record.
2. Go to the **Forms** tab.
3. Locate the form and click the corresponding **Edit Info**. ISSM will open the form.
4. **Save** the form without changing any information.
5. Click **View PDF** on the PDF Creation Complete page to view the form using **Acrobat Reader**. From there, the form can be printed and given to the student or scholar.
6. For non-SEVIS forms: the bottom of the SEVIS tab contains a listing of forms that have been issued to the student or scholar. Clicking on the PDF icon corresponding to a given form will open it in **Acrobat Reader**.

## Sending e-mail and letters to students, or scholars, or employees

There are three ways to send mail to individuals using the Record Navigator.

- Sending mail to single recipients
- Sending e-mail blast announcements
- Sending form letters.

### Sending e-mail to single recipients

Use the following instructions to send an e-mail message to a student or scholar.

1. Go to the **E-Mail Address** tab.
2. Click the address to initiate an e-mail message to the student or scholar.

#### **Note**

When you send an e-mail to a student or scholar from the **E-Mail Address** tab, your default e-mail client, for example Microsoft Outlook, is used to send the mail. History of the sent e-mail is stored by the system

used to send the mail. To send e-mail to a single student or scholar and save a history of that mail in ISSM, use the Ad-Hoc E-mail function as described below. ■

## Sending ad-Hoc e-mail

Use the following instructions to send an ad-hoc e-mail message to a student or scholar.

1. Click the **E-mail** icon on the **Record Navigator** tool bar. The Compose E-mail Message-Ad Hoc E-mail window is displayed. From this window you can compose an e-mail message to the student or scholar.
2. Enter the address the e-mail is being sent from in the **From E-mail Address** field. This is a required field.
3. Select the e-mail address types to which the e-mail is to be sent in the **Send E-mail to:** section. This field will have the list of e-mail address types that have been defined. More than one type can be selected and the e-mail will be sent to the e-mail addresses associated with those e-mail address types.

### Note

If the student or scholar does not have a valid e-mail address for the types selected, an error message will be displayed. ■

4. Enter up to 4 additional e-mail recipients in the **Additional Recipient E-mail** fields.
5. Fill in the **E-mail Subject** and **E-mail Body** fields and attach the appropriate documents by clicking on the Add Attachments link.
6. Click **Send E-mail** to schedule the e-mail to be sent. The e-mail is displayed on the **Interactions** tab. Click **Cancel** to close the screen without saving the data entered.

## Sending e-mail blast announcements

The e-mail blast is sent out as multiple messages directly to each individual, rather than being sent as a single message to many recipients. You can access the E-mail Blast function in two different ways: using the **Retrieve Report** function from Quick Search, or by selecting the Advanced Search value in the **Choose Report Search Parameter(s)** drop-down in Report Writer.

Use the following instructions to send an e-mail blast message to a group of students.

1. Select the group of individuals by using the Retrieve Report function or the Advanced Search.
2. Click the envelope icon to open the **Compose E-mail Message- E-mail Blast** window.

3. Enter the sender's e-mail address in the **From E-mail Address** field. This is a required field.
4. Select the e-mail address types to which the e-mail is to be sent in the **Send E-mail to:** section. This field will have the list of e-mail address types that have been defined. More than one type can be selected and the e-mail will be sent to the e-mail addresses associated with those e-mail address types.
5. Enter up to 4 additional e-mail recipients in the **Additional Recipient E-mail** fields.
6. Fill in the **E-mail Subject** and **E-mail Body** fields and attach appropriate documents by clicking on the Add Attachments link.
7. Click **Send E-mail** to schedule the e-mail to be sent. Click **Cancel** to close the screen without saving the data entered.
8. When you click Send E-mail, a message notifies you that the e-mail blast has been sent successfully. This message indicates the e-mail blast is scheduled to be sent with the next group of e-mail messages. Refer to the *ISSM Technical Guide* for instructions on scheduling e-mail batches and *ISSM Advisor Guide* for information on using the E-mail Blast Manager.

## Sending form letters

Use the following instructions to send a pre-formatted form letter to a group of students or scholars.

1. Select the group of individuals by using the Retrieve Report function or the Advanced Search.
2. Click the letter icon to open the Form Letter window.
3. Choose a form letter template from the **Select Template** drop-down menu at the top of the window, or select **None: Ad-Hoc Letter** and enter a message in the **Letter Text (Only Use With Ad Hoc Letter)** field.
4. Click **Submit**; a Microsoft Word window will open, containing as many copies of the form letter as there are recipients. From there, the letter(s) can be re-formatted as needed before being printed and sent to the selected students or scholars.

### Note

When printed, the form letter(s) will each print out on their own pages, although the Microsoft Word window embedded in Internet Explorer will not display this formatting. Choose **View > Print Layout** from the menu bar at the top of the window to show the letters as they will be printed. ■

# Troubleshooting

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This subsection contains explanations of certain problems that users may frequently encounter when using the Record Navigator. It is not a comprehensive list of problems that users may encounter. For problems not listed here, refer to the technical support Knowledge Base at the ISSM Web site. It is frequently updated with solutions, work-arounds, and, when appropriate, notices about known problems with and updates to the ISSM software.

## Cannot modify fields in student or scholar records

If the contents of a given field are not editable in the Record Navigator, this is due to one of the following issues:

- The student's record is DataLink Active.
- The user does not have permission to modify records in the department that "owns" the record.

To toggle the DataLink status of a student or scholar record, follow the instructions outlined under ["Campus DataLink status"](#). After the student has been set to DataLink Inactive, modify his/her record as needed. Remember to re-set the student or scholar's DataLink status so that the Campus DataLink can update it using information from the campus database.

If the student or scholar is already DataLink inactive, then the current user probably does not have adequate permissions to modify the records of students or scholars in the department that owns the selected record. To rectify this situation, note the departmental owner of the student or scholar record specified in the **Bio** tab's **Department** field (located in the **ISSM Settings**) section and ask the ISSM administrator to increase the user's permission level for this department to *Read/Write* or higher.

## Missing data in SEVIS forms

From time to time, SEVIS will generate I-20 and DS-2019 forms that are missing information. Check the SEVIS Real-Time Interface (RTI) to be sure that the missing information is in the student or scholar record. If the data is in the RTI, then the error comes from within the SEVIS system, which is not putting the information in the form. If the information is not in the RTI, then the information was not uploaded to SEVIS. This could be due either to user error or to a problem with ISSM.

To rule out user error, contact the ISSM administrator for permission to check the batch upload file on the ISSM web server to see if it contains the missing information. If it does not contain the information, check the student or scholar record to be sure that the information is there at all. However, if the batch file does contain the information, then there may be a problem with ISSM that requires technical support.

The table below contains a quick reference of some possible causes to this problem:

Information is in...	But not in...	Probable Cause
ISSM Database, Batch Upload File	I-20/DS-2019, SEVIS RTI	ISSM error, unless the event or batch was rejected on download.
ISSM Database	I-20/DS-2019, SEVIS RTI, Batch Upload File	User Error or ISSM error; the information was probably not included in the SEVIS event/batch.
SEVIS RTI, ISSM Database, Batch Upload File	I-20/DS-2019	SEVIS Processing Error. Contact the SEVIS Help Desk at 800-892-4829 for further assistance.
N/A	I-20/DS-2019, SEVIS RTI, Batch Upload File, ISSM Database	User Error. The information was never entered in the student or scholar record. It's possible that the information was rejected rather than approved after a Campus DataLink import.

## User cannot view certain records

The user does not have permission to see a certain department's records. Contact the ISSM administrator and ask for *View* permission on the department.

## Record Navigator does not contain a given field

ISSM may not contain fields for all data used by a given office. In those cases, custom fields must be created to accommodate the information using the ISSM **Enterprise Manager**. Contact the ISSM administrator and ask for the creation of the needed custom field(s) or, if the user has access to the Enterprise Manager, follow the instructions under ["Maintaining custom fields"](#) to add a custom field.

## Cannot generate forms in some records

The user does not have a high enough permission level to generate forms in records owned by a given department (or departments). Contact the ISSM administrator and ask for *Create Forms* privileges for the department that owns the record in question.

## Cannot generate notes in student or scholar records

The user does not have a high enough permission level to generate notes in student or scholar records. Contact the ISSM administrator and ask for *Advisor Notes Access* permission.

## Looking ahead

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By this point, users should be able to add individuals to and delete them from the database, update records, search the database, create new immigration forms for individuals, set reminders to perform tasks, and schedule and modify appointments. The next chapter, **The Task and Appointment Manager**, will build on information in this chapter, explaining how to use the Task and Appointment Manager to modify tasks and appointments.

# 4 The Task and Appointment Manager

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This chapter includes information on the Scheduled Notes, Tasks & Appointments.

- [“Introduction” on page 4-1](#)
- [“The Task and Appointment manager environment” on page 4-2](#)
- [“Using the task and appointment Manager” on page 4-3](#)
- [“Looking ahead” on page 4-4](#)

## Introduction

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Use the Task and Appointment Manager to view scheduled appointments and tasks, and to view users' schedules.

Before reading this chapter or using the Task and Appointment Manager, users should be familiar with the capabilities and operation of the Record Navigator, as these two features of ISSM work closely together.

# The Task and Appointment manager environment

The Task and Appointment Manager window is divided into two frames. The frame on the left contains a **Calendar** drop-down menu for viewing user schedules, and a sortable list of the current user’s tasks. The pane on the right contains a list of **Appointments and Tasks** scheduled for the date shown on the calendar.

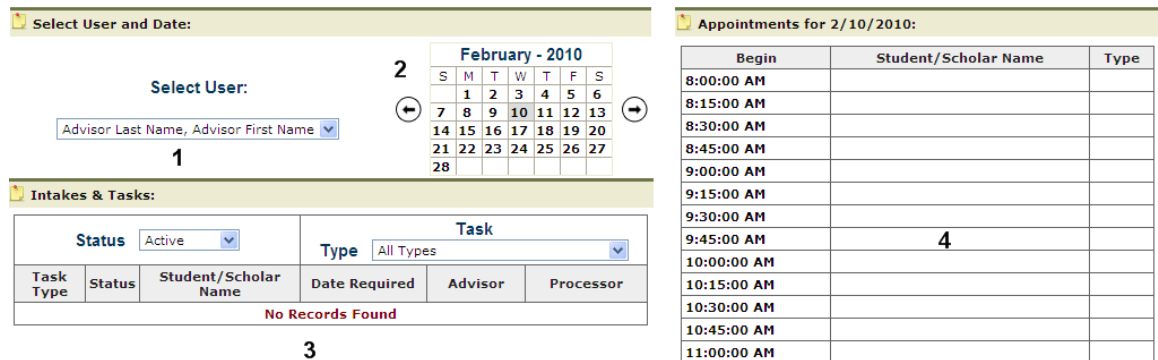


Figure 5: Appointments and Tasks

Number	Name	Function
1	Select User Drop-Down Menu	Chooses the user whose schedule is being viewed.
2	Calendar	Selects the date for which appointments are displayed.
3	Intakes & Tasks	Displays a sortable list of the current user’s tasks.
4	Schedule	Displays the current user’s appointments.

## Select user and date table

Switch between the current user’s schedule and those of other users with the **Select User** drop-down menu.

Click a date on the **Calendar** to show events scheduled for that day. Click the arrow buttons next to the calendar to view a different month.

### Note

All users can modify other users’ appointments and task lists. ■

## Intakes and tasks table

The Intakes & Tasks table, which lists scheduled appointments and tasks, is explained in the following table.

Name	Function
Task Type	The task's type (new immigration form, change of status, other). The drop-down menu sorts the list by the selected value. The contents of the Task Type menu can be modified with the Enterprise Manager. Refer to <a href="#">“The Enterprise Manager”</a> for instructions on setting values for drop-down menus.
Status	The task's status (pending, completed, deleted). The drop-down menu sorts the list by the selected value.
Student or Scholar Name	The name of the individual for whom the task is being performed.
Date Required	The date by which the task must be completed.
Advisor	The user who creates the task.
Processor	The staff member who performs the task.

The drop-down menus are used together to sort the user's task listing. For example, setting the **Status** menu to *Completed* and the **Task Type** menu to *New Form* lists all requests for a new form that have been completed.

## Using the task and appointment Manager

The primary functions of the Task and Appointment Manager are to view, modify, and delete tasks and appointments that have been created for individuals with the **Record Navigator**. The instructions for accomplishing these tasks are listed in the sections below; refer to [“The Record Navigator”](#) for more information about using the Record Navigator.

### Creating tasks and appointments

The user can navigate to [“The Record Navigator”](#) to know how to create appointments and tasks. To modify or delete them once they have been created, follow the instructions below.

 **Note**

Any ISSM user can create appointments and assign them to other users, but users must have *Can be assigned to Tasks and Appointments* permission to have appointments assigned to them. ■

## Modifying tasks and appointments

Use the following instructions to modify an existing task or appointment.

1. Locate the task or appointment:
  - For Tasks: Locate the task with the **Intakes & Tasks** menu and click the entry in the **Task Type** column corresponding to the task being viewed.
  - For Appointments: Locate the appointment with the Calendar.
2. The task or appointment will appear in the window on the left. Update its contents.
3. Click **Save** when finished to update the database and go to the Confirmation Page, or click **Cancel** to return to the previous screen without making any changes.
4. Print a reminder of the appointment, if necessary, from the Confirmation Page or return to the Task and Appointment Manager.

## Deleting tasks and appointments

Use the following instructions to delete an appointment or task.

1. Open the appointment or task.
2. Set the **Status** drop-down menu to *Deleted*.
3. Click **Save**.

## Looking ahead

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After reading this chapter, users should be able to create, view, modify, and remove appointments and tasks, navigate the ISSM calendar, and view other users' schedules. The next chapter discusses the Report Writer, which generates reports based on information in the ISSM database.

# 5 The Report Writer

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This chapter includes information on the Custom, Open Doors, and Pre-Programmed Reports.

- [“Introduction” on page 5-1](#)
- [“Quick steps for creating a new report” on page 5-2](#)
- [“About report views” on page 5-2](#)
- [“Report Writer interface” on page 5-3](#)
- [“Creating a new report” on page 5-7](#)
- [“Running existing reports” on page 5-20](#)
- [“Modifying existing reports” on page 5-21](#)
- [“Deleting a report” on page 5-22](#)
- [“User permissions and report access privileges” on page 5-23](#)
- [“Troubleshooting and Hints” on page 5-25](#)
- [“Looking ahead” on page 5-26](#)

## Introduction

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The Report Writer queries the ISSM database and outputs the results to HTML, Microsoft Word, Microsoft Excel, or a list of records in the Record Navigator. These reports can either be custom reports created by ISSM users or pre-programmed reports that are included with ISSM.

The Report Writer has report “views” to determine which fields are available on which to search data. These views are a subset of the fields in the ISSM database and are grouped together in accordance to business logic. For example, the database view “Record Nav - Bio Tab,” contains fields from the Record Navigator’s Bio tab. Another may be a query of all of the Create Student SEVIS events in the ISSM database.

To create a report, you name it, select field(s) from one or more of these views, customize the output, and create the output. Keep in mind that the reports include only the information that you have permission to view.

The Report Writer will also generate **Open Doors** reports for both students and scholars.

## Quick steps for creating a new report

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Use the following instructions to create a new report.

1. [“Step 1: Name the report”](#).
2. [“Step 2: Choose the fields and column order for a new report”](#).
3. [“Step 3: Choose the visible fields in a new report”](#).
4. [“Step 4: Sort report results in a new report”](#).
5. [“Step 5: Set search parameters \(filters\) for a new report”](#).
6. [“Step 6: Run a new report”](#).

## About report views

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This section provides information on downloading and hiding report views.

### Downloading report views

When new report views are available, they can be automatically downloaded from the ISSM Web site. The frequency of the download is determined by a setting in the ISSM Configuration file. The report views can also be manually downloaded from the Enterprise Manager. For instructions on doing this, refer to [“The Enterprise Manager”](#).

 **Note**

For instructions on modifying the ISSM Configuration file, refer to the *ISSM Technical Guide*. ■

 **Warning**

Do not attempt to write your own Report Writer views. Modifying the ISSM database in any way without prior authorization from Ellucian voids your customer support agreement. If you need new Report Writer views, send a request into customer support. ■

Once the views are downloaded, they are immediately available for use in the Report Writer.

The primary benefits of this structure are that it allows the list of reportable fields in ISSM to be easily modified, with every field in the database--including configuration settings and audit tables--available for reporting.

 **Note**

To request new fields in the Report Writer, contact ISSM Customer Support. ■

## Hiding report views

Certain report views may be needed only at certain times, such as Open Doors reports or a list of pending Registration SEVIS events. As such, they can be hidden from view and recalled at a later time if necessary. An additional benefit of this approach is that schools do not need to see report views that they do not use. For instance, a school that does not have a J-1 Exchange Visitor program, would have no need to search for Site of Activity information or any of the J-1 SEVIS events. ISSM administrators at these schools would want to hide these report views so that their user interface is not cluttered by unnecessary information.

 **Note**

Hiding report views requires *Report Writer Administrator* access privileges. For instructions on granting users this privilege and/or hiding report views, refer to [“The Enterprise Manager”](#). ■

## Report Writer interface

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The Report Writer is built around two screens:

- |  |  |
|--|--|
| <p><a href="#">“The main report writer page”</a></p> | Used for managing the list of reports and for running existing reports. Can also be used to delete existing reports and to begin the process of creating new ones. |
| <p><a href="#">“The Report Writer Console”</a></p>   | Used for creating new reports, and for modifying, creating copies of, or deleting existing ones.   |

# The main report writer page

The Main Report Writer page is used to view, run, and delete existing reports:

The screenshot displays the 'Report Writer' interface. It is divided into three main sections: 'Report Filter', 'Report List', and 'System Reports'.

**Report Filter:** This section allows users to filter reports based on Creator, Last Run Date, Report Name, Report Status, and Paging Size. The current filters are set to 'All' for Creator and Last Run Date, 'Active' for Report Status, and '20' for Paging Size. An 'Add New Report' button is located in the top right corner.

**Report List:** This section displays a table of existing reports. The table has columns for Report Name, Report Creator, Report Status, Date Created, Last Run Date, Last Run By, and a Delete button. The total number of reports found is 12.

Report Name	Report Creator	Report Status	Date Created	Last Run Date	Last Run By	
Appointment Report	User	Active	9/3/2009	10/24/2012	pasang	Delete
Base MEG Report for SEVIS Registration Event	User	Active	6/29/2009			Delete
Base MEG Report for SEVIS Student Verify Event	User	Active	6/29/2009			Delete
Custom Field with various data	pasang	Active	7/11/2012	7/11/2012	pasang	Delete
E-mail Blast	pasang	Active	6/17/2013	6/17/2013	pasang	Delete
Email Blast issue with Interaction tab	pasang	Active	6/17/2013	6/17/2013	pasang	Delete
Email list report	pasang	Active	7/30/2010	11/2/2012	pasang	Delete
I-94 Report	pasang	Active	2/13/2013	9/25/2013	User	Delete
Report with EAD Date	pasang	Active	6/27/2012	8/14/2012	pasang	Delete
Report with Work Auth Date	pasang	Active	7/11/2012	8/14/2012	pasang	Delete
Salil Tests	User	Active	9/27/2013	9/27/2013	User	Delete
Stephanie's SEVIS Registration Report	User	Active	9/20/2012	9/27/2013	User	Delete

**System Reports:** This section lists various system reports that can be run. The reports are organized into two columns. A note at the bottom states: '\*\*Records with Visa Post Code removed per SEVIS 5.7 Report\*\*'. A 'Main Menu' button is located at the bottom of the page.

Figure 6: Main Report Writer page

Feature	Description
Add New Report	Click Add New Report to create a new custom report.
Report Filter	Use the drop-down menus to filter the report by Creator, Last Run Date, Report Name, Report Status (Active/Deleted), or Paging Size (number of reports per page). Multiple filters can be combined for more exacting searches (e.g. deleted reports created by a given user that had been run within the past month)
Custom Report List	Lists reports created by ISSM users. Click on the column headers to order the list of reports by Report Name, Report Creator, Report Status, Date Created, Last Run Date, and Last Run By user.
Delete (hyperlink)	Click Delete to delete the selected report. Deleted reports can be retrieved at a later time, if necessary.
System Report List	Lists system reports that are included with ISSM. This list can be updated by modifying the Report Writer configuration in the ISSM Enterprise Manager.
Main Menu	Click Main Menu to return to the ISSM Main Menu.

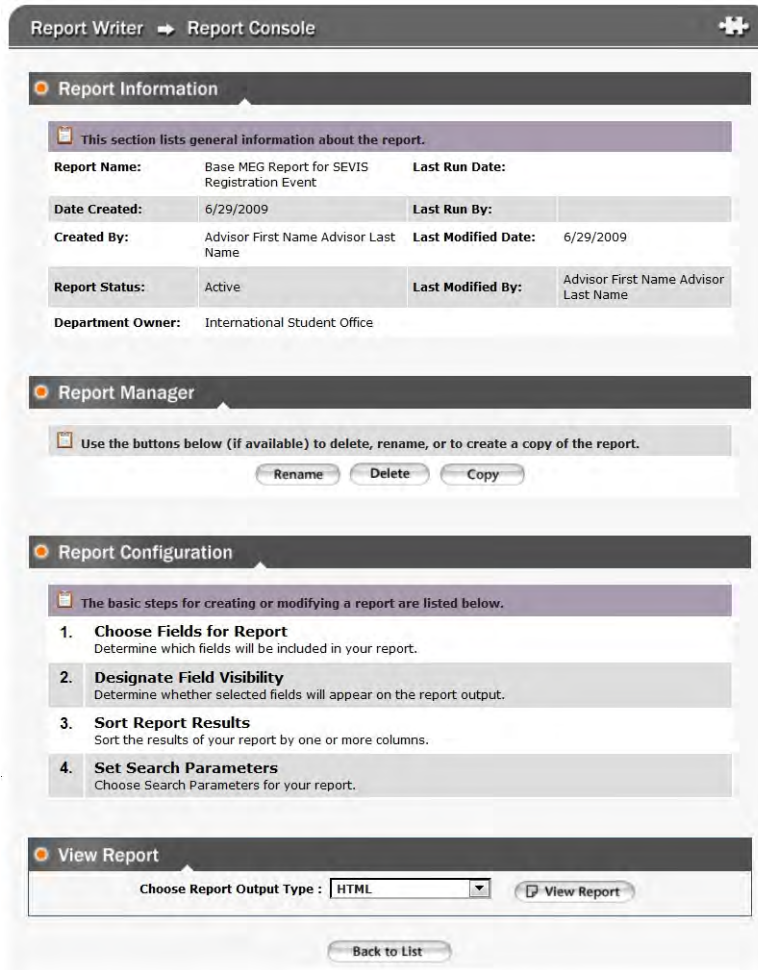
 **Note**

When searching for a report by typing a search string in the **Report Name** field, wildcard characters cannot be used the middle of the search string. You can use wildcards at the end of the search string to search for reports. For example, searching for 'Report%' will return all reports with names beginning with 'Report', but searching for 'Re%t' will not return any results. ■

## The Report Writer Console

The Report Writer Console page is used when viewing or modifying a given report. It can also be used to delete, un-delete, rename, or create copies of existing reports.

The Report Writer Console is illustrated and explained below. Step-by-step instructions for working with it can be found later in this chapter.



**Figure 7: Report Console page**

Feature	Description
Report Information	Shows information about the Report, including Report Name, Last Run Date, Creation Date, “Last Run By” user, “Created By” user, Last Modified Date, Report Status (Active/Deleted), “Last Modified By” user, and the report’s Departmental “Owner.”
Report Manager	Allows you to Delete, Rename, or create a copy of the Report.
Report Configuration	Shows the steps for creating the report. Due to the design of the report building engine, reports cannot be created out of order, and steps that have not yet been completed will be shaded. To complete one of the report’s steps, click on its name.
View Report	Chooses the output format for the report (HTML, Microsoft Excel, Microsoft Word, Microsoft Excel Mail Merge List, or Advanced Search results in the ISSM Record Navigator.
Back To List Button	Click Back To List to return to the Report Writer Main Page.

# Creating a new report

---

When creating a new report, the report writer does not allow you to perform these steps out of order. When modifying an existing report, however, you can modify any portion of the report at any time.

## Step 1. Name the report

1. From the Main Menu, click **Report Writer**.
2. Click **Add New Report**.
3. Enter a name (required) and description (optional) for the report. Since many offices generate dozens of reports that may be similar in many ways, we recommend that you do include the description.
4. Select a departmental owner for the report with the **New Report Department** drop-down menu.

### **Note**

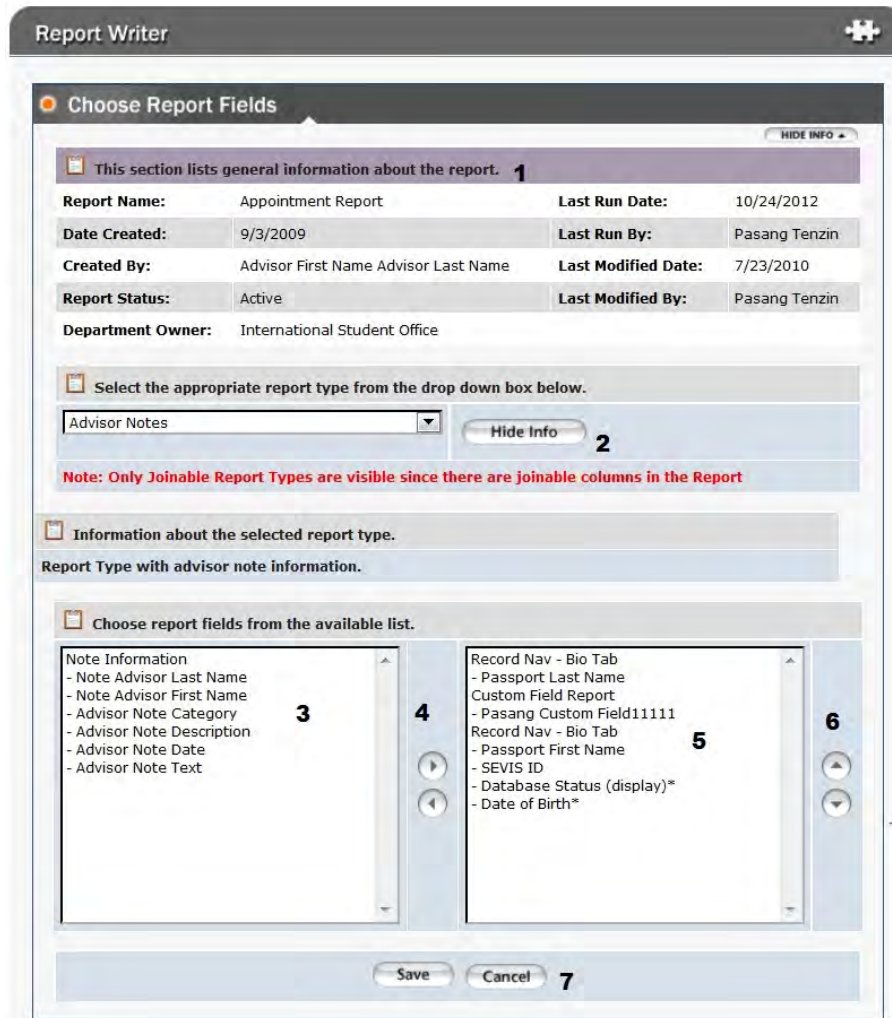
Report descriptions are optional; the report will run without a description. Since many offices generate dozens of reports that may be similar in many ways, all reports should have a description. ■

5. Click **Add New**.

## Step 2: Choose the fields and column order for a new report

The first step in building a Report Writer report is to choose the fields that will be used. At this time, the user should select all fields for the report, not just the ones that are being actively searched. For example, when creating a report that searches for a specific set of Profile information, but includes all related Address data, regardless of content, the user should select both the Profile and Address information at this time. The steps for designating fields as reported fields and for designating them as *included* values will be discussed later in this chapter.

The **Choose Fields for Report** interface is illustrated in the following image and then explained in the table below it. Familiarize yourself with it before creating a new report for the first time.



**Figure 8: Choose Report Fields page**

Number	Feature	Description
1	General Information	Shows general information about the report: Report Name, Report Created Date, “Last Run By” user, Status (Active/Deleted), Departmental “Owner” for the Report, “Last Run” Date, “Last Run By” User, “Last Modified” Date, and “Last Modified By” User.
2	Report Type Drop-down Menu	<p>Selects a database view for the report. Each database view contains a subset of the fields in the ISSM database, such as all the fields in the Record Navigator’s “Bio” tab. If desired, fields from multiple database views can be used in the report. Certain database views cannot be combined, however. For instance, it is not possible to report on student or scholar data and on ISSM configuration settings in the same report.</p> <p>The Report Type drop-down menu can be updated with new database views, and, if desired, unused views can be removed from the list. For more information about this, refer to <a href="#">“About report views”</a>, earlier in this chapter.</p>
3	Report Fields	Selects fields for the report. To add a field, click the name of the field, and then click the Right Arrow button to add the selected field to the report. You can select multiple fields by holding down the ALT or CTRL keys while clicking on one or more fields, just like in other Windows-based applications.
4	Left Arrow and Right Arrow Buttons	Adds and removes fields from a report. Clicking the Right Arrow button will add the selected row(s) to the report. Clicking the Left Arrow button will remove the selected row(s) from the report.
5	Fields in Report	Lists the fields that have been assigned to the Report. Use the Up Arrow and Down Arrow to change the order of the fields, or select one or more fields and click the Left Arrow to remove it or them from the report.

Number	Feature	Description
6	Up Arrow And Down Arrow Buttons	Assign columns to the selected fields. The first field in the list will be the first column on the far left side of the report output; the last field in the list will appear on the far right side of the report; use the buttons to move fields up and down.
7	Save and Cancel Buttons	Click Save to move to the next step in the Report Configuration list.  Click Cancel to return to the previous page without saving your changes.  <b>Note:</b> If you do not click Save, your changes will be lost. This includes clicking the broker's Back button.

Use the following instructions to choose fields for the report.

1. Click **Choose Fields for Report** in the Report Configuration section of the Report Writer Wizard. The Choose Report Fields page is displayed.
2. Use the drop-down menu in the **Choose Report Fields** page to select a group of fields (e.g. Record Navigator's Bio Tab, Address Tab, or Dependents Tab).
3. Click on a field name from the list of fields on the left side of the page (e.g. Passport Last Name, Date of Birth, etc.). To select more than one field at a time, hold down the SHIFT or CTRL keys while clicking.

 **Note**

After you select a field, the following message appears in the section where you select a view: Only Joinable Report Types are visible since there are joinable columns in the Report. This message means that not all views will appear in the drop down list. Instead, the views that have fields that can be joined with the field(s) that you have already selected will appear. For example, if you have already selected a student field, the code table views do not appear (and are not selectable). ■

4. Click the **Right Arrow**. The fields appear in the list on the right side of the page and disappear from the list on the left. To remove a field from the list on the right side of the page, select the field(s) and click the **Left Arrow**.
5. Repeat the previous steps to select fields from other areas of the application.

6. Once the fields have been chosen, select one or more fields and use the **Up Arrow** and **Down Arrow** to choose the order of columns in the report output. The first field in the list will be the initial column in the report's output, the last field will be the final column in the report's output.
7. Click **Save** when finished. ISSM will return to the **Report Writer Wizard**.

### Note on e-mail address fields for reports

As of the 9.0.0 release, e-mail address information has moved from under the **Address** tab of the *Record Navigator* and is stored under a new **E-Mail Address** tab. As a result, a new report type *Record Nav - E-mail Address Tab* has been added with the following report fields: *E-mail Address*, *E-mail Address Type*, and *Notes*. Use these new fields for new reports related to e-mail address information.

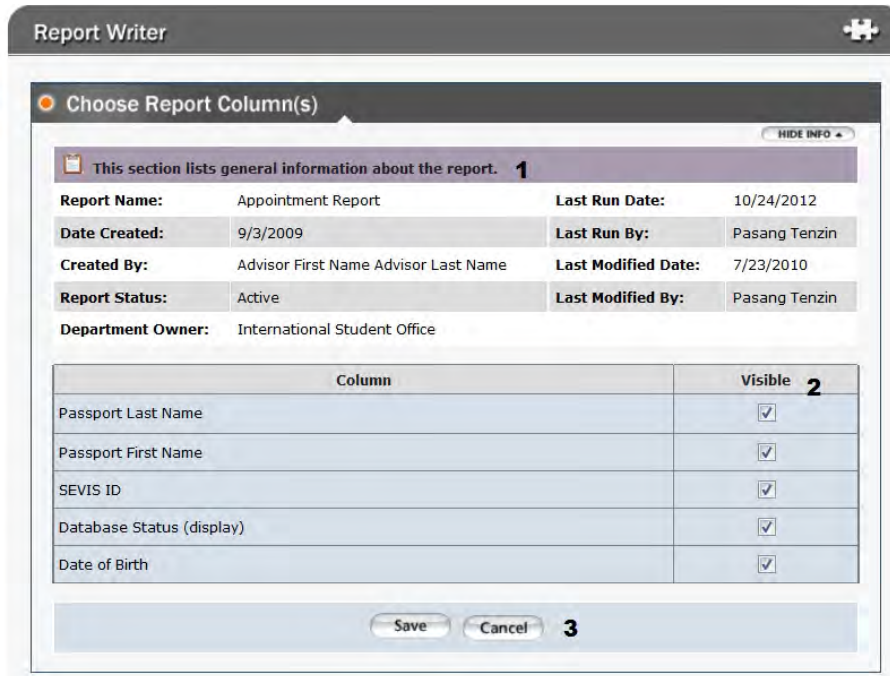
The existing *Email* report field has not been removed from the *Record Nav - Address Tab* report type in order to preserve the data in existing reports that use this field.

## Step 3: Choose the visible fields in a new report

In some cases, a user may wish to exclude fields from appearing in a report, even if the field is used as a search parameter. For instance, if an advisor creates a list of SEVIS-Active, F-1 students, there would be no need to include the Profile Status, Profile Type, or Profile Subtype fields in the report output since all of the records retrieved by the Report Writer would contain the same values in those fields.

By default, all fields used in the report are designated as visible. It is up to the user to determine which fields should be left off of the report's output.

The following is a sample of a Choose Report Column(s) page:



**Figure 9: Choose Report Column(s) page**

Number	Feature	Description
1	General Report Information	Shows general information about the report: Report Name, Report Creation Date, “Last Run By” user, Status (Active/Deleted), Departmental “Owner” for the Report, “Last Run” Date, “Last Run By” User, “Last Modified” Date, and “Last Modified By” User.

Number	Feature	Description
2	List of Fields	<p>Lists the fields that were selected on the “Choose Report Fields” page. When the “Visible” box is checked, the fields will appear in the report output. When unchecked, the field will not be used.</p> <p>This functionality is useful for when a field is needed for the purposes of querying the database, but will not be needed in the final report. For instance, a report consisting entirely of F-1 students will need to include “Profile Type” and “Profile Subtype” as search parameters, but since all of the returned rows will contain the same value in those fields, there is no practical purpose for including them in the final results.</p>
3	Save and Cancel Buttons	<p>Click Save to save your changes and return to the Report Console.</p> <p>Click Cancel to return to the Report Console without saving your changes.</p> <p><b>Note:</b> Unless you click Save, your changes will be lost if you leave this page. This includes using the browser’s Back button.</p>

Use the following instructions to change the visibility of a field.

1. Click **Designate Field Visibility** in the **Report Configuration** section of the **Report Writer Wizard**.
2. The **Choose Report Column(s)** page lists all of the fields that have been chosen for the report. The **Visible** check box will be checked for each report by default. By unchecking the box, the user designates the field as being invisible; it will not appear in the report’s output.
3. Click **Save** when finished. ISSM will return to the Report Writer Wizard.

## Step 4: Sort report results in a new report

The reports generated in ISSM can be sorted by any combination of the rows used in it. If the user doesn’t specify a sort order, the report’s results will be sorted in ascending order according to the first column (e.g. alphabetically by the students’ last names, or in increasing order of Campus ID).

The page used for sorting results is illustrated in the following image and table:

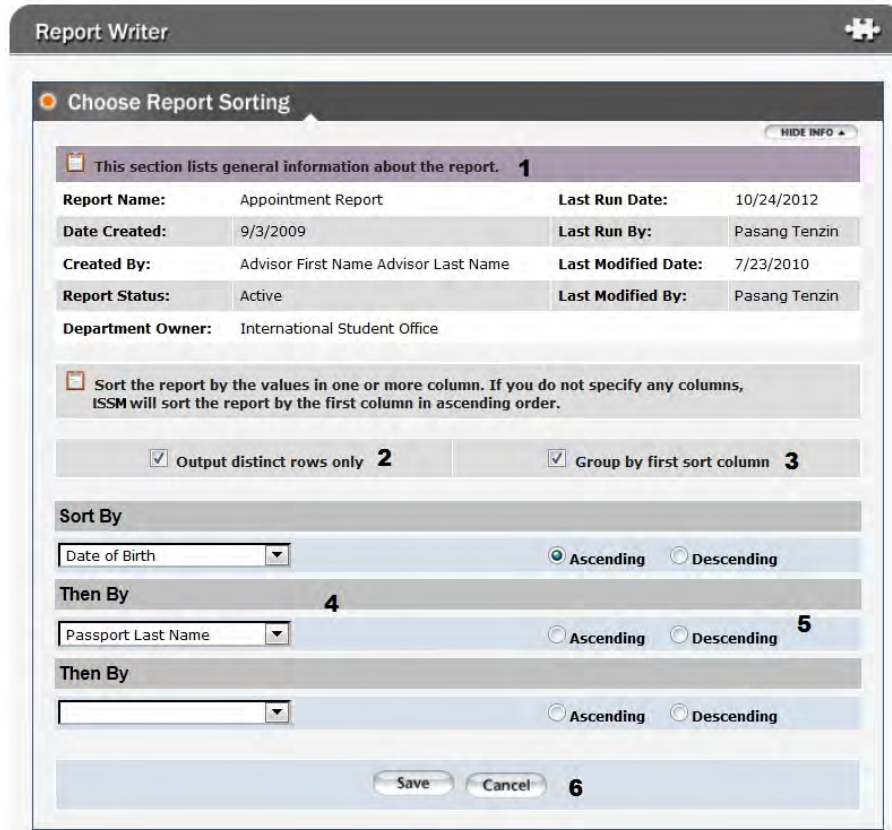


Figure 10: Choose Report Sorting page

Number	Feature	Description
1	General Report Information	Shows general information about the report: Report Name, Report Creation Date, “Last Run By” user, Status (Active/Deleted), Departmental “Owner” for the Report, “Last Run” Date, “Last Run By” User, “Last Modified” Date, and “Last Modified By” User.

2	Output Distinct Rows Only Check box	When this box is checked, ISSM truncates duplicate rows into a single row in the report output only if the rows are perfect duplicates and there are no differences in any of the field’s value among the duplicates. When unchecked, duplicate rows appear in the report output.
---	-------------------------------------	---

One use for this feature is performing a search for addresses. For example, many records may have the same value for the “foreign” and “permanent” addresses. The duplicates can then be truncated into a single instance in the report.

Number	Feature	Description
3	Group by First Sort Column Check box	When checked, creates subtotals for each item in the first “Sort By” column. For instance, if the first “Sort By” column is “Profile Status,” the Report Writer will return separate totals for each Profile Type (e.g. 160 F-1 records, 103 J-1 records, 92 H-1B records, etc.).
4	Sort By Selection Boxes	Choose the columns by which the results will be sorted. Refer to items “3” and “5” for more information about refining sorts.
5	Ascending and Descending Buttons	Chooses whether the columns are sorted in Ascending order (A to Z) or Descending order (Z to A).
6	Save and Cancel Buttons	Click Save to save your changes and return to the Report Console.  Click Cancel to return to the Report Console without saving your changes.

**Note:** Unless you click Save, your changes will be lost if you leave this page. This includes using the browser’s Back button.

Use the following instructions to choose Sort Columns for a report.

1. Click **Sort Report Results** in the **Report Configuration** section of the **Report Writer Wizard**.
2. Use the **Sort By** drop-down menus to choose a field from the report.
3. Choose whether the column will be sorted in ascending or descending order using the **Ascending** or **Descending** radio buttons next to each drop-down menu.
4. Repeat the previous two steps for each field that will be used as a sort.

 **Note**

The first **sort** column does not necessarily have to be the first column in the report. ■

5. Click **Save** when finished. ISSM will return to the Report Writer Wizard.

## Step 5: Set search parameters (filters) for a new report

Before assigning search parameters, it’s important to understand how the Report Writer builds search queries. The Report Writer is capable of creating much more complex

reports than it could in earlier versions of ISSM, but also requires more specific instructions.

 **Note**

There is no limit on the number of search parameters that you may use in a report.

The Search Parameter page is illustrated and explained below.

Figure 11: Choose Report Search Parameter(s) page

Number	Feature	Description
1	General Report Information	Shows general information about the report: Report Name, Report Creation Date, “Last Run By” user, Status (Active/Deleted), Departmental “Owner” for the Report, “Last Run” Date, “Last Run By” User, “Last Modified” Date, and “Last Modified By” User.
2	Group Modification Tools	Use the check box(es) to activate a search parameter group. Use Add New Group to create a new search parameter button.  Use Delete Group(s) to remove a group from the report altogether.
3	Linked Report Check box	When set to <i>On</i> the Report Writer will perform sub-queries within a specified existing reports. When set to <i>Off</i> , the Report Writer will search the entire ISSM database.
4	Search Parameters	Choose search parameters for the Reports by using the drop-down menus to select a field. ISSM will automatically present a list of search options depending on the data type of the field selected (e.g. text string, date, check box, etc.). For more information about the logic of search parameters and search groups, refer to <a href="#">“Search parameter logic”</a> .
5	Save and Cancel Buttons	Click Save to save your changes and return to the Report Console.  Click Cancel to return to the Report Console without saving your changes.  <b>Note:</b> Unless you click Save, your changes will be lost if you leave this page. This includes using the browser’s Back button.

## Search parameter logic

The Report Writer has two levels of searches: individual search parameters, and search groups, which are composed of multiple parameters. It combines the two together to form complex data queries that allow for “AND” and “OR” searches. Combining individual fields within a group creates an “AND” filter, while the relationship between groups is expressed as an “OR” filter:

(A AND B) OR (C AND D) OR (E AND F)

For example, a search for the records of all F-1 Students, J-1 Scholars, and H-1 Employees from India would require three search groups, each containing separate searches for Profile Type, Profile SubType, and Country of Citizenship:

(F-1 AND STUDENT AND INDIA) OR

(J-1 AND SCHOLAR AND INDIA) OR

(H-1 AND OTHER AND INDIA)

When building search queries, ISSM builds from within groups. So, to build a multi-tiered query like the example above, first create the “AND” search within the first group (Profile Type=F1; Profile SubType=STUDENT; Country of Citizenship=INDIA) before creating the second group (Profile Type=J-1; ProfileSubType=SCHOLAR; Country of Citizenship=INDIA).

### Note

If a search parameter is to be included in more than one group, it must be added to each group; the Report Writer does not assume that a given field should be mass-populated to each group in the query. ■

Even when creating simpler queries, the “AND” and “OR” structure persists. So, to create a simple query such as all records with F-1, J-1 or H-1 Profile Types, three search groups must be created:

(F-1) OR (J-1) OR (H-1)

This query returns the complete list of records that contain an F-1 Profile, a J-1 Profile, or an H-1 Profile.

Failure to adhere to the Report Writer’s logic structure will lead to inaccurate results. Using the example above, the Report Writer would return a drastically different data set if the user were to combine the three search parameters into a single group:

(F-1 AND J-1 AND H-1)

This query returns the complete list of records that contain an F-1 Profile, a J-1 Profile, and an H-1 Profile.

## Search parameter instructions

Use the following instructions to set search parameters to filter the report's output.

1. Click **Set Search Parameters** in the **Report Configuration** section of the Report Writer Wizard.
2. Use the **Choose Report Search Parameters** drop-down menus to pick fields. The Report Writer offers the operators specified in the table below.

Operator	Description	Used with Data Type	Sample Value(s)
Equals	Returns records containing a matching value in the field. Not case-sensitive.	String, Date, Integer, Number	smith; 01/01/2004; 100.25; 100
Begins With	Returns records where the field's contents begin with the value entered.	String	smi
Greater Than	Returns records where the field's contents are greater than the value entered.	Integer, Number	1700; 100.25
Less Than	Returns records where the field's contents are less than the value entered.	Integer, Number	1700; 100.25
Ends With	Returns records where the field's contents end with the value entered.	String	ith
Contains	Returns records where the field contains the value entered, either on its own, or as part of a larger string.	String	mit
Sounds Like	Returns records where the field contains a value that sounds like the value entered.	String	drift
Equals (Case Sensitive)	Returns records containing a matching value in the field. Case-sensitive.	String	Smith
Between X and Y	Returns records containing a date that falls between the two specified dates.	Date	01/01/2004; 12/31/2004
X Days Before/After Today	Returns records containing a date that is a specified number of days before or after the current date.	Date	30; 60; 90
True/False	Returns records where the field is true or false.	Binary (Check box)	N/A

**Note**

Operators will only appear with certain data types. For example, the **True/False** operator will not appear with strings or dates, only when **True/False** check boxes are selected. ■

3. Enter a value for the search parameter.
4. Repeat the previous two steps to add additional fields to the current search group.
5. To create a new search group, click **Add New Group**, and repeat the process of adding search parameters to the new group.

**Note**

There is no limit to the number of search parameters that can be added to a search group, or to the number of search groups that can be created.

To remove a group from a report, select the check box next to its name. ■

## Step 6: Run a new report

Use the following instructions to view the output of a new report.

1. Choose an output format (HTML, Microsoft Excel, Advanced Search Results in the Record Navigator, Microsoft Word, Microsoft Excel for Mail Merge) using the **View Report** drop-down menu.
2. Click **View Report**.

## Running existing reports

---

Use the following instructions to run an existing report.

1. Open the **Report Writer**.
2. Scroll down to the **Report List**.
3. Click on the name of the report.
4. On the Report Writer Wizard page, select an output format from the **View Report** drop-down menu and click **Save**.

## Modifying existing reports

---

Use the following instructions to modify an existing report.

1. Open the **Report Writer**.
2. Scroll down to the **Report List** and click on the name of the report. This will open the Report Writer Wizard, where the report can be modified by following the steps outlined under **Creating a New Report** above.

## Renaming a report

Use the following instructions to rename an existing report.

1. Open the **Report Writer**.
2. Scroll down to the **Report List** and click on the name of the report. This will open the Report Writer Wizard.
3. Scroll down to the **Report Manager** section of the page and click **Rename**. This will open the **Rename Report** page.
4. Enter a new **Report Name** and/or **Report Description** and click **Save**. ISSM will return to the **Report Writer Wizard**, where the report will have a new name and/or description.

### **Note**

Only users with *Edit/Delete Reports* permission can rename a report. ■

## Creating a copy of a report

Use the following instructions to rename an existing report.

1. Open the **Report Writer**.
2. Scroll down to the **Report List** and click on the name of the report. This will open the Report Writer Wizard.
3. Scroll down to the **Report Manager** section of the page and click **Copy**. This will open the **Copy Report** page.

4. Enter a **Report Name** and/or **Report Description** for the copy of the report and click **Save**. ISSM will return to the **Report Writer Wizard**, where the copy of the report will be open.

 **Note**

Only users with *Run/View Reports* permission can copy a report. ■

## Deleting a report

---

ISSM reports can be deleted in one of two ways:

- By toggling the **Report Status** value in the **Report Information** section of the Report Writer Wizard.
- By Clicking **Delete** in the **Report List** section of the **Report Writer**.

 **Note**

Report access is determined by user permissions. You can only delete reports if you have *Edit/Delete Reports* permission. You can always delete reports that you created. ■

## Reactivating (un-deleting) a deleted report

Use the following instructions to un-delete a report that has been previously deleted.

1. Open the **Report Writer**.
2. Use the **Report Filter's Report Status** drop-down menu to select **Deleted** reports. The Report Writer will display a list of all reports with a **Deleted** status.
3. Locate the report in the **Report List**. Click its name. The Report Writer will switch to the Report Writer Console page.
4. Scroll down to the **Report Manager** section of the page.
5. Click **Reactivate**. The page will refresh and the **Report Status** (in the **Report Information** section of the page) will switch from **Deleted** back to **Active**.

The report will now appear in the list of **Active** reports.

# User permissions and report access privileges

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Reports are assigned a departmental owner at the time of their creation. Users who do not have permission to view or modify that department's reports cannot access them.

Permission	Description
None	User cannot view, run, modify, delete or un-delete any reports created by that department.
Run/View Reports	User can view or run copies of reports created by that department, but cannot modify, delete or un-delete them.
Edit/Delete Reports	User can view, run, modify, delete or un-delete any reports created by that department.

## Note

Every user will always have *Edit/Delete Reports* privileges for reports that they create. ■

There is another permission setting for the Report Writer: *Report Writer Administrator*. Users with *Report Writer Administrator* privileges have the ability to update the Report Writer's report definitions. This allows them to modify the list of database views in the **Choose Fields for Report** section of the Report Writer Wizard. For more information about the Report Writer database views, refer to [“About report views”](#).

Refer to [“Setting user permissions”](#) for step-by-step instructions on setting user permissions and additional information on user permissions.

## Setting a user's home department and report writer access permissions

Since a user's Home Department setting will determine the access rights that other users have to their reports, it is important to ensure that each user's Home Department is configured properly.

For more information and instructions regarding user permissions, refer to [“The Enterprise Manager”](#).

## Setting a user's home department

Use the following instructions to set a user's home department.

1. Log into ISSM.
2. Open the **Enterprise Manager**.
3. Click **Configure User Permissions and Roles**.
4. Select the User and click the corresponding **Edit Info** in the **Edit User** column.
5. Locate the **Department** field. It is located in the **Basic User Information** section of the page.
6. Use the **Department** drop-down menu to set the user's home department.
7. Click **Save** when finished. The changes will take effect the next time the user logs into ISSM.

### **Note**

If the Configure User Permissions and Roles option is not visible in the Enterprise Manager, contact the ISSM application administrator and request *Configure User Permissions and Roles* access privileges. ■

## Setting a user's report writer access privileges

Use the following instructions to set a user's report writer access privileges

1. Log into ISSM.
2. Open the **Enterprise Manager**.
3. Click **Configure User Permissions and Roles**.
4. Select the User and click the corresponding **Edit Info** in the **Edit User** column.
5. Locate the **Report Permissions** section of the page.
6. Locate the desired department(s) and toggle the radio buttons to change the user's permission level(s).
7. Click **Save** when finished.

### **Note**

If the Configure User Permissions and Roles option is not visible in the Enterprise Manager, contact the ISSM application administrator and request *Configure User Permissions and Roles* access privileges. ■

# Troubleshooting and Hints

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The following points describe the various troubleshooting and hints for the report writer.

- When searching for Profile information, it is important to specify whether the Report Writer should only search on the current Profile by including `Current Profile = True` as a search parameter. Otherwise, the Report Writer will look in ALL profiles of the selected records.
- When searching for Profile information, it is important to specify whether the Report Writer should only search on the current Profile by including `Current Profile = True` as a search parameter. Otherwise, the Report Writer will look in ALL profiles of the selected records.
- To remove a group from a report, uncheck the check box next to its name. When the Report Writer compiles the output, it will bypass the logic contained in that group.
- If a report appears to have disappeared from the Report Writer, check user permissions to be sure that you have permission to view it.
- If a report is not returning the expected number of records, check your user permission levels. If you don't have *View* or higher access rights for a given department, its records will not appear in your reports. For instructions on setting user permissions, refer to [“The Enterprise Manager”](#).
- If you cannot modify a report, check your user permission level to be sure that you don't have *View* access for the department that owns the report.
- If information appears to be missing from the set of reportable fields, contact the ISSM administrator to make sure that the view is not hidden. This value can be checked using the Enterprise Manager's Configure Report Writer settings.
- Sort the list of reports in the Report Writer by Report Name, Creator, Active/Deleted Status, Date Created, Last Run Date, and the Last Run By user by clicking on any of the column headings in the Report List.
- Use the Report Filter to filter the list of reports by Creator, Last Run Date, First Letter of Report Name (Report Initial), Active/Deleted Report Status, and number of reports per page (Paging Size).
- The pre-formatted system reports and the user-created custom reports are sorted separately for easy reference.
- The Report Configuration steps must be done in order; users cannot choose search parameters before choosing fields for the report. Steps that have not yet been completed will be “grayed out” in the application interface.
- If duplicate rows are appearing in your report, check the Output Distinct Rows Only check box in the Sort Order section of the report. Refer to [“Step 4: Sort report results in a new report”](#) for more information about this feature.

## Looking ahead

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After reading this chapter, users should be able to generate a wide variety of reports using ISSM Report Writer. The next chapter, The **SEVIS Management Console**, discusses using ISSM **SEVIS Management** console feature to keep track of changes to SEVIS-reportable information.

# 6 The SEVIS Management Console

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This chapter includes information on the SEVIS console feature to keep track of changes to SEVIS-reportable information. Uploading and Downloading SEVIS Batches is explained in detail.

- [“Introduction” on page 6-1](#)
- [“SEVIS manager interface” on page 6-2](#)
- [“SEVIS configuration instructions” on page 6-4](#)
- [“SEVIS event generation and completion” on page 6-7](#)
- [“Uploading and downloading batches” on page 6-10](#)
- [“Generating multiple events” on page 6-14](#)
- [“Troubleshooting” on page 6-23](#)
- [“Looking ahead” on page 6-25](#)

## Introduction

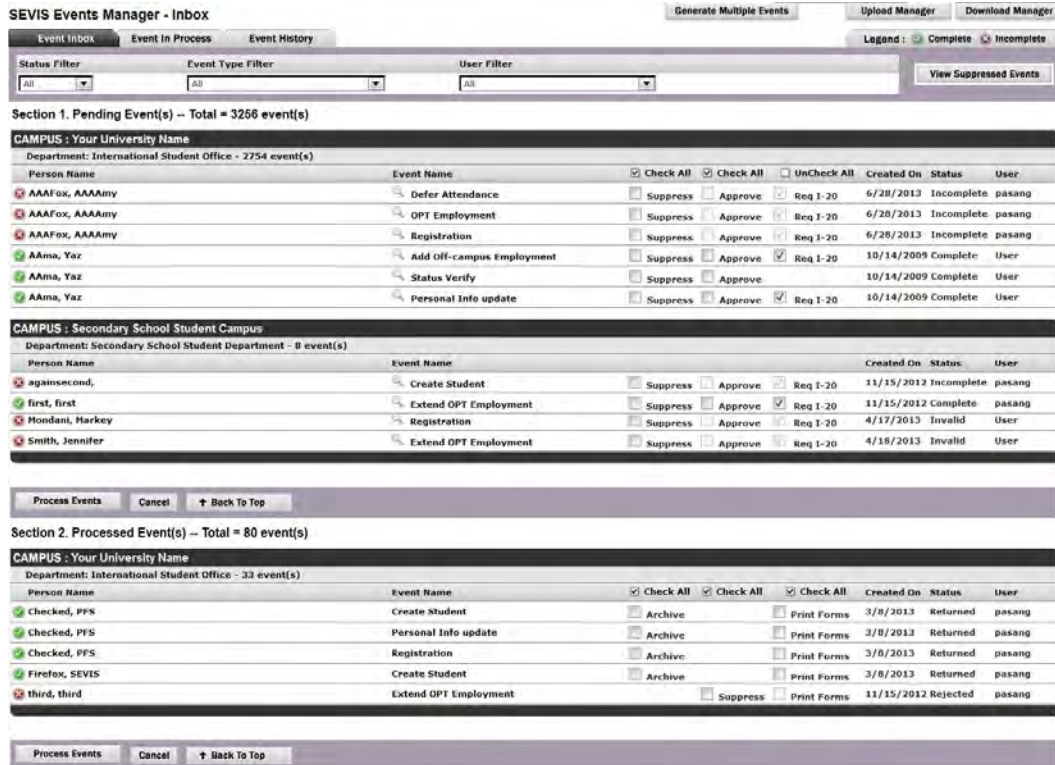
---



The SEVIS Management Console processes SEVIS-reportable events, submits batches to SEVIS, and receives downloads from the SEVIS server.

# SEVIS manager interface

The following image and table explain the SEVIS Management Console interface:



## SEVIS Management Console

Name	Description
Event Inbox	Lists SEVIS events that have not been added to a batch and events that have been processed by the USCIS and downloaded. The list of events can be filtered to include complete, incomplete, invalid, returned, or rejected events. Completes SEVIS events and assigns them to batches.
Events in Process	Lists the following: events that have been added to a batch, but have not been uploaded to the USCIS; events in batches that have been uploaded to the USCIS, but have not yet been downloaded.
Event History	Lists batches that have been downloaded and archived. List of events can be filtered to include events from the previous day, week, month, or year.
Upload Manager	Uploads batches to SEVIS. Requires <i>Upload and Download SEVIS Batches</i> privileges.
Download Manager	Downloads batches from SEVIS. Requires <i>Upload and Download SEVIS Batches</i> privileges.

Name	Description
Event Details	Keeps an itemized count of SEVIS events.
Event Filter	Drop-down menus used to filter event lists by type, status, and user.
Color Coding Key	Explains the color coding of SEVIS events. Red events are incomplete, and are not ready to be added to batches; green events are complete, and can be added to batches.
Pending Event Lists	List of SEVIS events that are either incomplete or have yet to be submitted for batch processing. Sorted by user and department. The contents of these lists can be sorted with the Event Filter.
Returned Event List	List of SEVIS events that have been submitted to the USCIS and have received a response from SEVIS. Indicates whether or not the SEVIS system accepted the information.
Multiple Event Generation	Allows you to generate an event for multiple records. This currently provides options for the student registration and verification events.

## How SEVIS batching works

When schools enter data into SEVIS using the **SEVIS RTI**, users log into the SEVIS RTI Web site, manually enter student or scholar information into the system, and receive I-20/DS-2019 forms upon request.

The batch interface works in a different way. Rather than having users re-enter student or scholar information in a second system, ISSM copies information from SEVIS-reportable student or scholar records and uploads it to the SEVIS system in batches of up to 50 records at a time. Upon receipt of the information from ISSM, SEVIS processes the upload, enters the data into its own database, and generates I-20/DS-2019 forms, as well as a SITE ID for each student/scholar record, which the school then downloads with ISSM. ISSM student or scholar records are then automatically updated with SEVIS IDs and SITE IDs, if applicable.

Throughout this process, the batches are identified using the school's SEVIS School Codes and User IDs, and the data transfers are encrypted with a 128-bit Verisign Digital Certificate, per USCIS regulations.

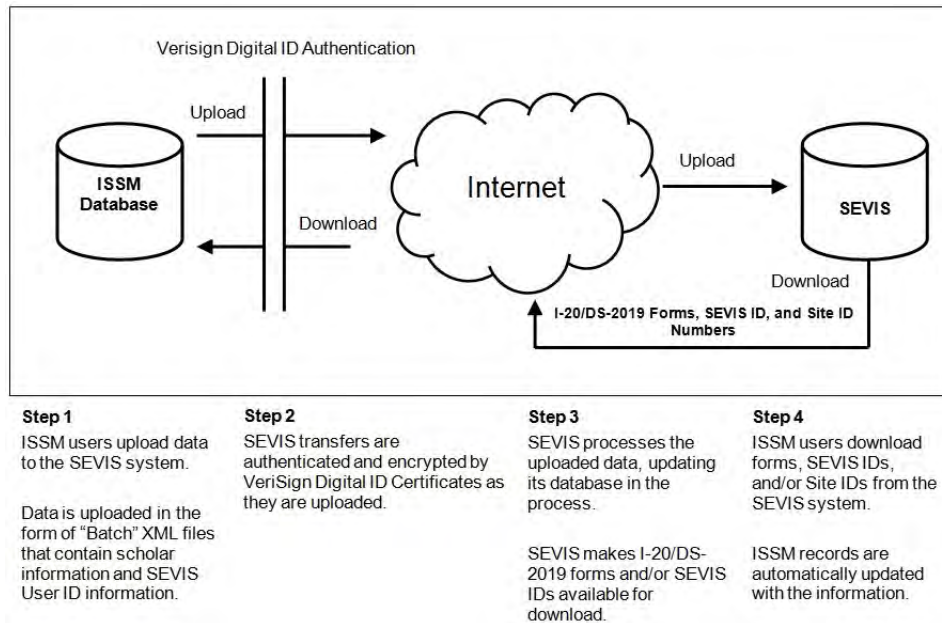
When working with batch applications such as ISSM, the user only has to enter data into one system and can transfer it to SEVIS simply by clicking a button instead of doubling the user's work. The time saved with this approach is compounded by the fact that ISSM will upload dozens of records at a time. In this way, the school's SEVIS-related workload is exponentially reduced. As an offshoot of this, the school can be sure that the data in

ISSM matches the information in the RTI, since it is simply copied from one database to the other. There are no typos or transposed records in the batch process.

 **Note**

SEVIS uploads and downloads are user-triggered processes. At no point does ISSM report data to SEVIS without the user’s permission. ■

The following image provides a visual overview of the SEVIS batch process:



**Figure 12: SEVIS batch process**

## SEVIS configuration instructions

Before ISSM can upload batches to SEVIS, there are a few configuration steps that must be taken. The steps listed here are not the only ones required for successful SEVIS implementation, but are the ones that are most commonly overlooked during the implementation process.

For a full listing of configuration requirements, refer to the Chapter 3, “Installing or Upgrading” in the *ISSM Technical Guide*.

### Certificate installation and upload

The Verisign Digital ID Certificate must be installed on the ISSM server and uploaded to the SEVIS RTI or SEVIS transfers to be successful. Refer to Chapter 5, “SEVIS Certificate Installation” in the *ISSM Technical Guide* for instructions on this process.

## Assigning SEVIS IDs to DSO/PDSO users

Each DSO/PDSO user must have his/her own SEVIS User ID. To acquire additional SEVIS User IDs, log into the SEVIS RTI as the PDSO, and create new users for the school.

Use the following instructions to assign the acquired SEVIS User ID to ISSM.

1. Go to the **Enterprise Manager**.
2. Select **Configure User Permissions and Roles**.
3. Locate the user and click the corresponding **Edit Info**.
4. Locate the **SEVIS User ID for Students (F/M Visas)** field and enter the user's F-type SEVIS ID.
5. If applicable, locate the **SEVIS User ID for Scholars (J Visas)** field and enter the user's J-type SEVIS ID. Even if the J-type and F-type IDs are the same, the SEVIS User ID must be entered in both fields.
6. Click **Save**. The updates will take effect the next time the user logs into ISSM.

## Assigning user permissions

All users who will be working with SEVIS events and/or batches must be given appropriate user permissions within the ISSM application. There are two basic permission levels for SEVIS batching:

Permission	Description
Sign or Approve SEVIS Events	Allows users to generate SEVIS events and to assign them to batches. This level should be assigned to DSO users.
Upload and Download SEVIS Batches	Allows users to do everything in the Sign/Approve SEVIS Events permission level and upload/download batches as well. This permission level should be assigned to PDSO users, although many schools choose to have a second individual within the International Students or Scholars Office with this permission in the event that SEVIS batches need to be uploaded or downloaded when the PDSO is out of the office.

### Note

Refer to the *ISSM Advisor Guide* for more information about assigning user permissions. ■

Use the following instructions to set user permission for a given user.

1. Go to the **Enterprise Manager**.
2. Select **Configure User Permissions and Roles**.
3. Locate the user and click the corresponding **Edit Info** in the **Edit Permissions** column.
4. Select the appropriate permission level and click **Save** to update the user. The changes will take effect the next time the user logs in.

## Campus configuration

For more information regarding proper configuration of the campus or department structure Refer to the *ISSM Advisor Guide*.

Use the following instructions for setting up a campus, after the campus configuration has been decided.

1. Go to the **Enterprise Manager**.
2. Click **Configure Campus/Department Structure**.

Locate the appropriate campus and click the corresponding **Edit Info**.

The fields required for SEVIS batch processing are listed in the following table. The names of the fields used with J-1 batch processing only are written in bold:

Field Name	Function
Campus Name	The name of the campus (ex. <i>Name Of University</i> ).
SEVIS F/M School Code	The Campus' SEVIS School Code for F-1/M-1 students (ex. <i>SEA214F12345678</i> ).
SEVIS J School Program Number	The Campus' Program Number for processing J-1 records. This value functions in the same manner as the SEVIS School Code, except it applies to J-type batch transfers (ex. <i>A-1-12345</i> ).
SEVIS PDSO's User Id (for F/M school)	The SEVIS User ID of the PDSO (e.g. <i>tpdso-1234</i> ).
SEVIS RO's User Id (for J school)	The SEVIS User ID of the RO. This value functions in the same manner as the PDSO's SEVIS User ID, except it applies to J-1 batch transfer (e.g. <i>rtest12345</i> ).
SEVIS Files Upload Directory	When ISSM creates batch upload XML files, they are written to this directory and are eventually uploaded to SEVIS (e.g. <i>C:\fsaATLAS\YourUniversityName\SevisTransfer\Upload</i> ).

Field Name	Function
SEVIS Files Download Directory	When I-20/DS-2019 PDF forms are downloaded from SEVIS, they are stored on this server. The “Virtual Directory Alias Name for SEVIS Documents” virtual directory mentioned below points to this directory, and allows ISSM users to access the PDF files through the web application (e.g. <i>C:\fsaATLAS\YourUniversityName\SevisTransfer\Download</i> ).
SEVIS Files Working Directory	ISSM downloads SEVIS batches as ZIP archive files. Upon initial download, it places them in this directory and then extracts the PDF files to the “SEVIS Files Download” directory (e.g. <i>C:\fsaATLAS\YourUniversityName\SevisTransfer\DownloadTemp</i> ).
Verisign Certificate Location and Filename	ISSM uses a Verisign Digital ID (Certificate) to authenticate and communicate with the SEVIS server. The location of the certificate should be entered in this field (e.g. <i>C:\fsaATLAS\YourUniversityName\SevisTransfer\SEA214F12345678.cer</i> ).
Virtual Directory Alias Name for SEVIS Documents	The Virtual Directory that maps to the “SEVIS Files Download Directory” as mentioned above. Only the name of the virtual directory (not its URL, or the directory to which it points) should be entered in this field (e.g. <i>SEVISPDFDocuments</i> ).

3. Fill in correct values for the fields listed in the above table.
4. Click **Save** to update the campus.
5. Repeat this process for each campus. Each campus requires its own upload and download folders, and virtual directory. While SEVIS will allow a single certificate to be shared across multiple campuses in batch testing, each campus should have its own certificate in the production environment.

## SEVIS event generation and completion

Generally speaking, SEVIS events are generated based on updates to SEVIS-reportable fields in the ISSM database. The updates to these fields can be made either through the **Record Navigator** or with the **Campus DataLink**. Either way, ISSM will generate the appropriate events, so long as the record has a profile status of *SEVIS - Active* or *SEVIS - Pending*.

SEVIS Events can also be generated using the Record Navigator’s **SEVIS Wizard**. Refer to [“The Record Navigator”](#) for more information about using the SEVIS Wizard.

Once a SEVIS event has been generated it must be filled in with all of the information required by SEVIS before it can be added to a batch and uploaded. This process is referred to as completing the event. While all events must be uploaded with the SEVIS Manager, they can be completed using either the Record Navigator or the SEVIS Management

Console, as shown below. From a technical standpoint, it makes no difference which method the user chooses; the decision of which method to use depends primarily upon workflow requirements.

A tool tip is available for the event in the SEVIS Manager to help users identify whether the event was created as a result of a name change versus some other type of change, such as an address change. When the user hovers the mouse over the event name, a window appears displaying *First Name*, *Last Name*, and *SEVIS ID* along with the original value of the field that changed and the corresponding new value. Only fields that have changed are displayed.

## Completing events in the record navigator

If student or scholar records are updated using the Record Navigator rather than the Campus DataLink, most users will find it easier to update student or scholar records in the Record Navigator and then to go to the **SEVIS** tab to update the record than to switch back and forth between the Record Navigator and the SEVIS Management Console. Also, end users who are more familiar with the pre-SEVIS, form-based workflow, will find it easier to work within this environment, since it shields the user from the technical aspects of the SEVIS batch process as much as possible.

For step-by-step instructions on completing an event with the Record Navigator, refer to the sections in [“The Record Navigator”](#) that discuss acquiring SEVIS I-20/DS-2019 forms for students and scholars. Those sections contain instructions for completing events and adding them to batches from the Record Navigator.

## Completing events in the SEVIS management console

In cases where the primary mode of entry is through the Campus DataLink, or if there are a large number of SEVIS events being generated at a given time, it may make more sense for users to deal with the events as a group, rather than on an as-noticed basis. For instance, if the school has only one I-20/DS-2019 signer, there may also be data-entry personnel that populate student or scholar records. However, when the time comes to complete SEVIS events and upload them, the PDSO/RO may like to have all of the events in one place so that he/she can deal with them as a group.

Use the following instructions for completing an event in the SEVIS Management Console.

1. Go to the **SEVIS Manager**.
2. Locate the **Section 1: Pending Events** section of the **Event Inbox** tab. The events are sorted by campus, department, and by the name of the user who created them.

- If the Event is Incomplete (Red):
  - 2.1. Locate the event being completed and click the **Edit** link to the right of the event's name to open the event.
  - 2.2. Fill in any required fields in the event that are not listed. Required fields have a red exclamation mark next to them.
  - 2.3. Scroll to the bottom of the page and click **Save** to update the event and return to the event manager.

If the Event is Still Incomplete (Red): Edit the event again. There will be an error message at the top of the page indicating what problem is preventing the event from being completed. If there is no error message, then there may be information missing from one or more required fields.

- If the Event is complete (Green):
  - 2.1. Check or uncheck the **Request I-20/DS-2019** check box as desired.
  - 2.2. Check the **Approve** check box and click **Submit Events**. This will add the event to a batch.

## Suppressing events

There may be cases when an event should not be submitted to SEVIS. Examples include instances where an event was manually generated by accident, or the automatic creation of a Create Student event when the record of a student or scholar who is already in the SEVIS RTI is made SEVIS - Active for the first time in ISSM. In these situations, the event should be submitted.

Use the following instructions to suppress an event.

1. Locate the event in the **Event Inbox**.
2. Check the corresponding **Suppress** check box.
3. Click **Submit Events**.

### Note

While Suppressed events can be retrieved at a later time, ISSM recommends against doing this unless the event was suppressed by accident. Instead, users should regenerate the event using the Record Navigator's SEVIS Wizard. ■

## Viewing Suppressed Events

Suppressed events can be accessed using the **View Suppressed Events** button on the SEVIS Manager. There are two filters on the *Review Suppressed Events* page to filter

events by type or by the user. You can filter the list of suppressed events by making selections from the drop-down lists for the **Event Type Filter** and the **User Filter**.

## Uploading and downloading batches

---

This section discusses about uploading and downloading the batches.

### Adding an event to a batch

Before an event can be uploaded to the SEVIS system, it must be added to a batch, as described.

Use the following instructions to add an event to a batch.

1. Open the **SEVIS Manager's Event Inbox** tab.
2. ISSM sorts the list of SEVIS events by campus, department and user. Locate the event(s) being added to the batch and check the **Approve** check box.

 **Note**

Click **Check All** to submit the entire list of completed events to the batch. ■

3. Click **Submit Events** to add the events to the batch.

 **Note**

ISSM automatically routes J and F/M events to separate batches. Similarly, batches from different campuses are uploaded separately. The general rule for this is that events are routed to batches by the SEVIS School Code of the campus that owns the student or scholar's department. ■

### Removing an event from a batch

If necessary, events can be removed from batches prior to upload. Use the following instructions to remove an event from a batch.

Use the following instructions to remove an event from a batch.

1. Open the **SEVIS Manager** and go to the **Upload Manager**.
2. Locate the batch containing the event and click the corresponding View Events link.
3. Locate the event, and check the **Remove From Batch** box. Repeat this step for any events being removed.

4. Click **Remove Event(s)**. The event will immediately disappear from the batch.

## Uploading batches

Use the following instructions to upload a batch to the SEVIS system.

1. Open the **SEVIS Manager** and go to the **Upload Manager**.
2. Review the contents of the SEVIS batch; this is the last chance that the PDSO will have to review the information before submitting it to SEVIS.
3. Check the **Upload** check box corresponding to each batch being uploaded.
4. Click **Upload Events** to upload the selected batch(es). There will be a pause as the batches are being uploaded; this process may take up to one minute to complete.

If the batch transfer was successful, the **SEVIS Batch Upload Status** page should resemble the following image:

The screenshot displays the 'SEVIS Batch Upload Status' page. At the top, a blue banner reads 'Important Note : DO NOT use the browser BACK button on this screen.' Below this, the page title is 'SEVIS Batch Upload Status'. A sub-header indicates 'Batch# : 10000000000225 for campus 1'. A section titled 'Important information regarding your upload batch :' contains the following details:

Batch ID	: 10000000000225
Campus ID	: 1
Batch File Name	: Batch_10000000000225.xml
Successful	: True
Success Message	: The upload of batch #: 10000000000225 was successful.
Error Code:	:
Error Message	:
Error Explanation	:

At the bottom of the screenshot, there is a button labeled 'Upload Manager'.

**Figure 13: SEVIS Batch Upload Status page**

If the transfer was unsuccessful, an error message on the page explaining why the transfer failed. If the batch transfer was unsuccessful, review and correct the batch's problems before attempting to upload it again.

### **Warning**

Do not click *Back* on the browser on the SEVIS Batch Upload Status page; it will cause ISSM to re-submit the batch, which may lead to duplicate records being created in SEVIS. ■

## Downloading batches

SEVIS batches are not immediately processed after upload. If batches are being submitted in a test environment, the USCIS will return the batch within an hour. When SEVIS batches are submitted in a live setting, the USCIS will return the batches by 6:00 AM (Eastern Time) the following morning. In cases where a response is needed more quickly than these guidelines will allow, the SEVIS RTI should be used instead.

Use the following instructions to download a batch from the SEVIS system.

1. Open the **SEVIS Manager** and go to the **Download Manager**.
2. Locate the batch in the list and check the **Download (or Retry)** check box.
3. Click **Download Events** to download the selected batch(es). There will be a pause while the batches are downloading. Depending on the number of batches being downloaded and the network connection, the download may take over a minute to complete.

After attempting the download, the **SEVIS Batch Download Status** page will appear, indicating whether the download(s) was/were successful. If the download was unsuccessful an error message will explain the problem. Most download failures stem from connectivity issues between ISSM and the SEVIS servers.

### Note

Downloaded events will reappear in the **Event Inbox**. ■

## Printing forms

After downloading a batch, the forms must be printed and issued to students or scholars.

Use the following instructions to print a single form.

1. Go to the **SEVIS Manager**.  
  
The events are sorted by campus, department, and user. The list of events can be filtered by user, event type, and status using the drop-down menus at the top of the page.
2. Locate the desired event(s) and check the **Print Forms** check box(es).
3. Scroll to the bottom of the section and click **Process Events**. The form will appear in **Acrobat Reader**. From there, it can be printed and given to the student or scholar.

To print a group of forms as a single print job, follow the instructions above, but check the **Print Forms** box for multiple events. When the events are processed, they will

appear as a single, continuous document in **Acrobat Reader**. After they are printed, it will be the user's responsibility to collate the forms.

 **Note**

When printing several forms at once, do not print two-sided copies of the forms; they will not print correctly. SEVIS does not accommodate duplex print jobs for I-20/DS-2019 PDF files. In situations where two-sided forms are necessary, they must be printed one-at-a-time. ■

## Archiving events and forms

After a batch has been downloaded and the forms have been printed and issued to students or scholars, the PDSO should archive the events contained in it so that they will be listed in the student or scholar records for reference at a later time. Archiving events will also help with “housekeeping” in the sense that it will help the user keep the SEVIS Management Console organized and free of extraneous, outdated information and will help the school keep all of a given student or scholar's information in his/her record.

Use the following instructions to archive an event.

**1. Open the SEVIS Manager.**

The events are sorted by campus, department, and user. The list of events can be filtered by user, event type, and status using the drop-down menus at the top of the page.

**2. Locate the desired event and check the **Archive** check box. Repeat this step for every event that is being archived.**

**3. Scroll to the bottom of the section and click the **Process Events**. The event immediately disappears from the SEVIS Manager. To view the archived event, open the student or scholar's record with the **Record Navigator** and go to the **SEVIS** tab. The archived events and forms can be accessed or printed from the **Section 3: History/Archived** section of the page.**

When a SEVIS event is created using RTI Access, a corresponding event is also created in ISSM. As the event is created for Historical tracking purpose, it is automatically archived. The created event name can be sorted based on the Event Name. A new column **Updated Via** has been added to the **Section 3: History/Archived Event(s)** to distinguish where the event was created. The **Updated Via** column will have the values as *RTI* or *Batch* and the column cannot be sorted.

 **Note**

When a SEVIS event is archived via the SEVIS Manager, the **Updated Via** column displays the value as *Batch*. ■

## Generating multiple events

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The Generate Multiple Events feature allows you to generate a single event for multiple records. If you have to perform the same task for many students or scholars, this feature can save your department a lot of time.

There are four events that are currently supported through this feature:

- Registration
- Program Info Update
- Status Verify
- Update Subject/Field Code (EV)

Using a report designed specifically for one of these events, a list of students or scholars is generated based on the selected fields and optional search parameters. Then using the list obtained from this report, you determine the individuals for whom this event should be triggered, enter the appropriate information for the event (if necessary), and start the process. Batch details and history are available for checking the progress and history of the record processing.

## Modifying the MEG check DataLink active flag

When configuring ISSM, there is a setting in the Campus DataLink tab of the Server Configuration Utility called Check DataLink Active During MEG Validation. By default, this setting is not checked, which means that the DataLink Active setting of a record is not considered when validating its eligibility for the selected event.

If you bypass the Campus DataLink Active checking of a record, the multiple event generator will update the fields associated with the events. However, keep in mind that if these event fields are also Campus DataLink active, then any changes you make in the events may be overwritten when new information comes through the campus system. You may want to evaluate how these fields are updated.

For more information, see *Campus data link configuration* section in Chapter 14, “Manage Configuration Settings” in the *ISSM Technical Guide* to use this setting.

## Using reports

This feature utilizes reports that generate lists of students or scholars for which to trigger the selected event. You should keep in mind that this will generate a list of records to which you have access (permissions).

### Note

If you are not familiar with using reports, please review [“The Report Writer”](#).

Default reports exist in ISSM for the multiple event generation feature:

- Registration event: Base MEG Report for SEVIS Registration Event
- Status Verify event: Base MEG Report for SEVIS Student Status Verify Event

 **Note**

If these reports do not appear in the Report Writer, confirm that the SQL script has been run to create these reports. Refer to *Chapter 3 Installing or Upgrading ISSM in the Technical Guide* for more information about this script.

If the script has been run, then confirm that you have permissions to the security department to view these reports (for example, International Student Office).

If you are in a different department, then a user with the appropriate permissions can copy the report and assign your department as owner. ■

These reports should be sufficient for creating a basic list of students or scholars that are valid for the selected event. However, it is advisable to copy this report and add additional fields and search parameters to further customize the list of students or scholars generated by the report.

## Report fields

The following is a list of the required fields that are in the Base MEG Reports.

### Base MEG Report for SEVIS Registration event

```
Record Nav - Bio Tab
- Passport Last Name
- Passport First Name
- SEVIS ID
- Campus Id
- Date of Birth
- DataLink Active
Record Nav - Profile Tab (Student Fields)
- Profile Status
- Profile Type (value)*
- Profile SubType
- Current Profile*
```

All fields listed above are required in the report for the Registration event except Campus ID and Current Profile.

#### Note

The above mentioned fields should also be included in any reports used for generating the Program Info Update and Update Subject/Field Code events. ■

The following is a list of the required fields for the SEVIS Student Verify event that is in the Base MEG Report.

### Base MEG Report for SEVIS Student Status Verify Event

```
Record Nav - Bio Tab
- Passport Last Name
- Passport First Name
- SEVIS ID
- Campus Id
- Date of Birth
- DataLink Active
Record Nav - Profile Tab (Student Fields)
- Profile Status
- Profile Type (value)
- Profile SubType
- Current Profile
SEVIS Student Verify Report
- Need Verify
```

All fields listed above are required in the report for the Status Verify event except Campus ID and Current Profile.

The report should include the above fields, which is dependent on the event that you have chosen. The only fields that are not required for the above events are **Campus ID** and the

**Current Profile.** If any of the other event fields are not included in the report, you will receive an error message and will need to select a different report.

## Customize the default reports

You may customize the default reports to further define your search for valid students or scholars. Before customizing these reports however, you should create a copy of the base report and edit this copy.

Customize your reports by adding additional fields and search parameters. For example, a recommended set of optional fields for the Registration event include:

- **Full-Time Status** with the search parameter for this field set to *Full-Time* or *Part-Time (Approved)*
- **Database status** with the search parameter for this field set to *Active*

If you include any address field in the **Report Writer** fields, then you must also include the **Current Address** field and set the search parameter for this field to *True*.

Keep in mind the following when setting up the fields and for the records to be eligible for the event:

- Profile Type - must be either *F-1* or *M-1*
- Profile SubType - must be *Student* or *Other*
- Profile Status - must be *SEVIS - Active* or *SEVIS - Pending*
- DataLink Active - your institution should determine if DataLink Active records can be updated through the multiple generation events. ISSM has a setting in the Server Configuration Utility that determines whether the DataLink Active setting will be considered during the check for a record's eligibility. Refer to Chapter 3, "Installing or Upgrading ISSM" in the *ISSM Technical Guide* for more information about this setting in the **Campus DataLink** tab.

## Generating the Events

Generate the mass events using the predefined Base MEG Event report or a report that you have created.

Use the following instructions to generate the events.

1. From the **SEVIS Manager**, click **Generate Multiple Events**. The Multiple Event Generation page appears.

### Note

The MEG Batch Processing Results History is discussed in "[Viewing the batch history](#)".

2. Click the event you wish to run. The available events are
  - Registration
  - Status Verify
  - Program Info Update
  - Update Subject/Field Code (EV)
3. See [“Viewing the batch history”](#) for information about viewing the history of batches using the MEG Batch Processing Results History.
4. Select the report from the **Choose a report** drop down list. This list shows all non-system reports.
5. Click **Continue**. The list of students is displayed for which the selected event will be generated.
6. In Step [3](#), fill in the fields for this event. The fields vary, depending on the event:

Registration Event	Status Verify Event	Program Info Update Event	Update Subject/Field Code Event
<ul style="list-style-type: none"> <li>• Current Session End Date (required)</li> <li>• Next Session Start Date</li> <li>• Last Session</li> </ul>	No fields	<ul style="list-style-type: none"> <li>• Primary Major</li> <li>• Secondary Major</li> <li>• Minor</li> <li>• Remarks</li> </ul>	<ul style="list-style-type: none"> <li>• Subject/Field (required)</li> <li>• Subject/Field Description</li> <li>• Remarks</li> </ul>

 **Note**

Each drop down field for the **Program Info Update** event and **Update Subject/Field Code** event includes a new option called “Use existing value”. Using this option, the system will pick up the existing value and use it when creating the event.

For example, if the current Major is Accounting, when the event is created through Multiple Event Generation, it will set the Major to Accounting. ■

In Step [4](#) the student or scholar records appear and those that meet the search criteria are automatically selected (checked) for this event. You may uncheck any records for which you do not want the event to be generated. Any records that appear in this list that are not valid for the selected event cannot be checked and appear with a red background. This includes records that contain any of the following settings:

#### Records Not Valid for Registration Event and Program Info Update Event

- SEVIS ID is blank
- Record is Campus DataLink Active (if this field is checked)
- Profile Type is not *F-1* or *M-1*
- Profile SubType is not *Student* or *Other*
- Profile Status is not *SEVIS - Active* or *SEVIS - Pending*

#### Records Not Valid for Status Verify Event

- SEVIS ID is blank
- Record is Campus DataLink Active (if this field is checked)
- Profile Type is not *F-1* or *M-1*
- Profile SubType is not *Student* or *Other*
- Profile Status is not *SEVIS - Active* or *SEVIS - Pending*
- Records that have had a successful event within the last six months and do need a Student Verify event issued

#### Records Not Valid for Update Subject/Field Code Event

- SEVIS ID is blank
- Record is Campus DataLink Active (if this field is checked)
- Profile Type is not *J-1*
- Profile Status is not *SEVIS - Active* or *SEVIS - Pending*

#### 7. Click **Continue** to generate the events now.

The batch is created, the Batch Detail page displays, and the event processing begins. The page is explained in the next section.

Once the processing of this batch is complete, you should navigate to the SEVIS Management Console to process (approve or upload) these events.

## Supported scenarios for Subject/Field Description field in the Update Subject/Field Code event

Scenario #	Scenario Description	Generated Event
1	Subject/Field Code = "Use Existing Value"  Subject/Field Description = "blank" (no value)	Subject/Field Code will be set to the EV's current subject/field code found in the Profile tab.  Subject/Field Description will be set to the EV's current subject/field description found in the Profile tab.
2	Subject/Field Code = "Use Existing Value"  Subject/Field Description = "custom description"	Subject/Field Code will be set to the EV's current subject/field code in the Profile tab.  Subject/Field Description will be set to the custom description entered in the text box.
3	Subject/Field Code = "Drop-down value other than Use Existing Value"  Subject/Field Description = "blank" (no value)	Subject/Field Code will be set to the Subject/Field Code chosen.  Subject/Field Description will be set to blank.
4	Subject/Field Code = "Drop-down value other than Use Existing Value"  Subject/Field Description = "custom description"	Subject/Field Code will be set to the Subject/Field Code chosen.  Subject/Field Description will be set to the custom description entered in the text box.

## Understanding the batch detail page

The Batch Detail page appears after you have started a Multiple Event Generation batch. This page also displays when viewing the history of a selected batch.



**Figure 14: Batch Processing Detail page**

The first time this page displays for a batch, the batch status is *Processing*. Click **Refresh** near the top of the page to refresh the status of the batch, the information in the **Updated Data** section, and the **Processed Records**.

The following table describes the details about this page:

Field	Description
<b>General Batch Information</b>	
Batch Event Type	Type of multiple event generation that occurred. Two possible options are Registration and Status Verify.
Created On	Date and time batch was created
Created By	The username of the user
Batch Status	Complete Processing (If processing, click Refresh to for the status to update.)  If the batch status never changes from Processing to Complete and/or you never see any events generated for the records, confirm with your institution's IT personnel that the MEG Processing Service is running.

**Updated Data**

Field	Description
Field Name	Names of the fields that can be updated through the selected event
New Value	Values entered for the fields that can be updated through the selected event

### Processed Records

Records that have not been processed yet do not appear on this page. Click Refresh at the top of the page to update the information on this page. If records have been processed, they will then appear in this section.

Filter	<p>Filter the results of the students. You have options to filter the processed records, as well as the status of the students' records. Only those records on which an event is generated will appear with "Yes" in the Processed column.</p> <p>The status of the students can be any of the following:</p> <ul style="list-style-type: none"> <li>• Event generated: Student record has been processed and event has been generated</li> <li>• Not selected: Unchecked on the list of eligible students</li> <li>• Not eligible: Does not match the criteria necessary for the selected event</li> </ul>
--------	---

## Viewing the batch history

On the Multiple Event Generation page, a link is provided called MEG Batch Processing Results History. Click this link to open the Batch Information page.

Multiple Event Generation

**Batch Processing Result History**

Cancel

Batch filters

Batch Event Type: All

Batch Status: All

Batch Creation Date	Created By	Type	Status
12/13/2009 10:01:59 AM	User	Registration	Complete
12/13/2009 9:01:59 AM	User	Registration	Complete

Cancel

Figure 15: Batch Processing Result History page

Item	Description
Batch Creation Date	Date and time that the batch was created
Created By	Username of the user that initiated the batch
Type	Type of event that was generated with the batch: Registration or Status Verify
Status	Status of the batch that will either be Complete (finished) or Incomplete (still processing or stopped)

Click **Batch Creation Date** to view a detailed page for the selected batch. (See previous section on viewing the batch detail.)

## Troubleshooting

The subsections below list some common problems that users encounter when attempting to process SEVIS events and/or batches. If there are errors that are not listed here, contact ISSM Technical Support for further assistance.

### User cannot see the upload manager and download manager buttons

Only users with permission to upload and download batches can access the upload and download capabilities in the SEVIS Manager. If these buttons are not visible, contact the ISSM administrator and ask for batch upload or download permission.

### User cannot see their department's events

Users can only see SEVIS events for departments to which they have access. If the records in a given department are not visible, contact the ISSM administrator to ask for access to the department.

### Certificate does not match school code error

This error, encountered on SEVIS Upload, usually indicates that the Verisign Certificate's PFX file (private key) has not been uploaded to the SEVIS RTI. Users often encounter this problem when they attempt to upload a J-type batch or a production batch for the first time. The PFX must be uploaded for F-type and J-type batches, in both the test and production environments. Another cause for this problem could be a typo in the **SEVIS F/M School Code** or **SEVIS J School Program Number**.

## File not found error on SEVIS download

When ISSM returns an error on a SEVIS download indicating that the file could not be found, this generally means that the event has not yet been processed by SEVIS, and is therefore not available for download. SEVIS batches take an hour to process in the test environment, and are available for download by 6:00 AM Eastern the next business day in the production environment. If the download is still within this timeframe, please wait to try the download again. If it has been more than 24-36 hours, and the download is still not available, there may be a technical problem with the SEVIS system.

## Timeout errors

If ISSM returns an error indicating that the connection to the SEVIS server expired in X number of seconds (60 seconds, 120 seconds, etc.), but the error message appeared almost immediately, the error is generally due to a problem with your certificate configuration. Review the processes outlined in Chapter 5, “SEVIS Certificate Installation” of the *ISSM Technical Guide* to make sure that the certificate has been properly installed and configured.

## Can not complete event

There are several factors that could cause a SEVIS event to not be complete. Most often, the error is due to missing or improperly formatted data, or a configuration problem. Common configuration errors include bad or missing SEVIS School Codes, PDSO SEVIS User IDs (on the Campus Configuration page), or DSO User IDs. Another common problem stems from bad or missing CIP codes with certain fields, such as majors and countries of birth/residence.

## Error message in event

If there is an error message associated with the event, fix the problem specified in the error message. If the cause of the error is unclear, contact ISSM Customer Support for assistance.

## No error message in event (everything appears normal)

If there is no error message associated with the “red” event, first check to be sure that all of the required fields contain data. If they have all been properly filled in, scroll to the bottom of the page and check to see if there are any Dependents and/or Sites of Activity listed in the event. If so, it is possible that there is bad or missing information in either of the two. To update Dependent information, go to the Record Navigator’s **Dependents** tab. To update Site of Activity information, go to the Record Navigator’s **Profile** tab.

## Enumeration constraint failed error

The **Enumeration Constraint Failed** errors are caused by bad or missing CIP codes with majors, subject field codes, education levels, countries of birth, citizenship and permanent residence, name suffixes, or any other field that is reported to SEVIS using mapped code table data. The error message will include the name of the field. To check the SEVIS codes for the field, go to the **Enterprise Manager > Maintain Select Box Values** and examine the specified field. If there appears to be no problem with the CIP Code(s), check to be sure that there are no trailing spaces after the CIP code.

## Invalid PDSO/RO user ID error

If ISSM is returning errors because of problems with the SEVIS School Code or PDSO/RO user ID. It means that one or more of those values is missing or incorrectly formatted. To resolve this, go to the Enterprise Manager and check the formatting of the following:

- SEVIS F/M School Code
- SEVIS J School Program Number
- Current User's **SEVIS User ID for Students (F/M Visas)**
- Current User's **SEVIS User ID for Scholars (J Visas)**
- **SEVIS PDSO's User Id (for F/M school)** (on the Campus Configuration page)
- **SEVIS RO's User Id (for J school)** (on the Campus Configuration page)

If none of these appear to have any problems, check for trailing spaces after the code or ID number. If all else fails, log into the SEVIS RTI to be sure that the information in ISSM has been correctly entered.

## Looking ahead

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After reading this chapter, users should be able to process SEVIS events, assign them to batches, upload information to the SEVIS system, and download batches from the USCIS. The next chapter, **The Enterprise Manager**, contains instructions on configuring the ISSM application.

# 7 The Enterprise Manager

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This chapter includes information on Maintenance and Administration of ISSM.

- [“Introduction” on page 7-1](#)
- [“Manage user permissions and roles” on page 7-3](#)
- [“Managing form templates” on page 7-10](#)
- [“Managing E-mail alerts” on page 7-12](#)
- [“Managing e-mail blasts” on page 7-15](#)
- [“Managing form letters” on page 7-17](#)
- [“Delete records” on page 7-24](#)
- [“Maintaining custom fields” on page 7-28](#)
- [“Campus DataLink configuration” on page 7-30](#)
- [“Configuring campuses and departments” on page 7-30](#)
- [“Configuring employers” on page 7-33](#)
- [“Configuring the report writer” on page 7-36](#)
- [“Configuring PFS Settings” on page 7-38](#)
- [“Configure application settings” on page 7-39](#)
- [“Portal Configuration options” on page 7-48](#)
- [“Looking ahead” on page 7-57](#)

## Introduction

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The Enterprise Manager configures the ISSM menus, adds and removes users, controls user permissions, creates form templates, and sets institutional information. It functions as the ISSM control panel.

The Enterprise Manager’s menu page contains ISSM Tools options, ISSM Configuration options, and ISSM Portal Configuration options. They are explained in the table below in the order that they appear on the Enterprise Manager screen as shown in the screen shot below.



**Figure 16: Enterprise Manager page**

Menu Item	Function
<b>ISSM Tools</b>	
Manager User Permissions and Roles	Create, manage, and delete users and their permission levels.
Manage Form Templates	Create templates for immigration forms.
Manage E-Mail Alerts	Configure the alert messages sent to individuals regarding date-sensitive information.
Manage E-mail Blasts	Manage and view the history of all e-mail blasts.
Manage Form Letters	Create templates for form letters used in the Record Navigator.
Manage Water Marks	Create, manage, and view water marks.
Delete Record	Permanently delete records from the system.
<b>ISSM Configuration</b>	
Maintain Select Box Values	Customize drop -down menus. Add, modify, and remove current menu items.
Maintain Custom Fields	Add, modify, or remove custom data fields; assign fields to tabs in the Record Navigator.
Configure Campus DataLink	Sets the “DataLink Active” status of data fields; configure the Code Table used by the Campus DataLink to parse the XML data file.
Configure Campus/ Department Structure	Sets the names of schools and/or campuses, and assign departments to them.
Configure Employers	Lists employers for I-129 and I-140 form templates.

Menu Item	Function
Configure Academic Departments	Configures academic departments that host visiting scholars. Used for configuring the International Scholar Dossier System.
Configure Report Writer	Determine which fields are available for reporting; downloads new report definitions from the ISSM Web site.
Configure PFS Settings	Customize PFS settings by choosing the configuration for each field in the corresponding SEVIS event.
Configure Application Settings	Manage application configuration settings used throughout the application.
<b>Portal Configuration</b>	
Configure Registration Requirements	Manage the list of requirements that students will need to meet before they can register for classes. The list of requirements will be displayed on the Student Portal.
Configure Certificate of Understanding	Add or edit text for the certificate of understanding that governs the use of the Student Portal. Portal users will see the certificate of understanding and will need to acknowledge that they agree to the terms.
Manage Portal Fields	Maintain all the fields that are displayed on the Student Portal. Change the display names, hide or display fields.
Configure Portal Events	Add or edit upcoming events to the portal. Portal users will see these events and can sign up for them.
Manage Portal Accounts	Create, activate, or disable login accounts and access to the portal for users.

## ISSM Tools options

## Manage user permissions and roles

Access to all of the essential functions of ISSM (form generation, access to database records, SEVIS batching, Campus DataLink, application configuration) is determined by user permissions and/or user information. Improper user permissions could lead to users experiencing unexpected difficulties. As such, ISSM administrators should consult with end users and advising staff to determine which areas of the application each user will need to use. Additionally, the *ISSM Advisor Guide* contains extensive information about user permissions. The subsections below contain step-by-step directions for creating, modifying, and deleting users as well as for assigning user permissions.

## Creating users

Use the following instructions to add a new user.

1. From the Main Menu, click **Enterprise Manager**, then click **Manage User Permissions & Roles**.
2. Click **Add New**.
3. Fill in the **Add New User** page. The fields are listed in the table below.

Field	Description
User Name	The user's ISSM login name. ISSM login names can contain letters and/or numbers. Spaces are allowed, but special characters (% , & , \$ , # , etc.) are not.
Set New Password?	Check this box to re-set the user's password. When creating a new user, this box must be checked.
Password	The user's password. ISSM passwords must be at least four characters long. ISSM passwords can contain letters and/or numbers. Special characters (% , & , \$ , # , etc.) and spaces are not allowed.
Confirm Password	When setting a password, the password must be re-entered here.
Last Name	The user's last name.
First Name	The user's first name, as it appears on immigration documents.
Department	The ISSM department with which the user works.
SEVIS User ID for Students (F/M Visas)	The user's SEVIS ID for F/M batch processing (e.g. jsmith1234 or tpdso-1234).
SEVIS User ID for Scholars (J Visas)	The user's SEVIS ID for J batch processing (e.g. jsmith1234 or rtest12345).
Form Information (I-129, I-538, I-140, I-907, I-9)	The information used in these fields will be used for signer and school information in immigration forms. Signer and School information for SEVIS I-20 and DS-2019 forms does not come from ISSM; it comes from SEVIS.

4. After filling in the user's information, scroll to the bottom of the page and click **Save** to create the user. The user will appear in the list of users.

## Setting user permissions

There are two types of permissions that can be set for each ISSM user:

- Global Permissions
- Departmental Permissions

## Global permissions

There are several permissions in ISSM that are not department-specific; they apply to all records in the ISSM application, regardless of which department “owns” the user (or the record he or she is accessing). These permissions are listed below:

Permission	Description
Configure User Permissions & Roles	Allows the user to modify user information and user permissions.
Configure Campus Data Link	Allows the user to configure Campus DataLink Active Fields and Campus DataLink Code Table Mapping.
Configure Campus/Department Structure	Allows the user to modify the campus/department configuration.
Configure Employers	Allows the user to modify the list of employers in the Enterprise Manager.
Configure Academic Departments	Allows the user to configure International Scholar Dossier Academic Departments.
Maintain Select Box Values	Allows the user to configure ISSM drop-down menus.
Maintain Custom Fields	Allows the user to configure ISSM custom fields.
DataLink Operator	Allows the user to run Campus Datalink batches.
Configure PFS Settings	Allows the user to configure the Privacy Field Suppression (PFS) settings.
Configure Application Settings	Allows the user to configure and manage application configuration settings.
Manage Form Letters	Allows the user to create templates for form letters.
Manage Form Templates	Allows the user to create templates for immigration forms.
Manage E-mail Alerts	Allows the user to configure e-mail alerts.

Permission	Description
Advisor Notes Access	Users with this level of permission can read and modify notes about students or scholars. Counseling/advising notes for students or scholars can contain confidential information that advisors may not want to share with other staff in the office, such as non-advising or support personnel. This permission cannot be set at the department level. Users cannot simultaneously have access to notes for one department's records and not be given access to notes for those of other departments; either the advisor has access to records or does not. There are potential privacy concerns associated with this permission, so do not assign it to any user that should not have access to information typically stored in these notes. Recommended for Advisors.
Can be assigned to Tasks and Appointments	This allows the user to be listed under the Select User drop-down menu in the Task and Appointment Manager. Note that this level only restricts whether a task or appointment can be entered for the user, not whether a user has access to the Task and Appointment Manager screen. All ISSM users can schedule an appointment. For example, reception and administrative staff may schedule appointments with advisors, even though students do not schedule appointments with him/her. In this case, the advisors should be given <i>Can be assigned to Tasks and Appointments</i> access, and the front desk staff should not. Recommended for: Advisors, Document-producing staff members, possibly IT personnel.
Report Writer Administrator	Allows the user to modify the list of Report Writer database "views."
Manage E-mail Blasts	Allows the user to manage e-mail blasts.
Delete Record	Allows the user to permanently delete records from the system.
Enable RTI Access	Allows the user to launch RTI Access in a new window. (e.g. Internet Explorer).
Configure Registration Requirements	Allows the user to add or edit university requirements on the Student Portal.
Configure Certificate of Understanding	Allows the user to edit and display the certificate of understanding text on the Student Portal.

Permission	Description
Manage Portal Fields	Allows the user to specify the fields that are displayed on the Student Portal and to edit those fields.
Configure Portal Events	Allows the user to add or remove notifications of upcoming events on the Student Portal.
Manage Portal Accounts	Allows the user to create or activate portal accounts and to manage accounts in batches.

## Departmental permissions

A user can be granted or denied access to records on a per-department basis. For example, a user can have full access to records owned by Department A, partial access to Department B's records, and no access to records owned by Department C. User permissions can be applied to any department and across campus lines. Depending on the campus or department configuration at the school, departmental permissions could vary from one user to another.

The permission levels are cumulative; if, for example, a user has Edit/Review/Approve SEVIS Events permissions for a given department, he/she will also be able to create and modify that department's forms and records.

The department-based permission levels are listed in the table below:

Permission Level	Description	Typical Usage
Upload and Download SEVIS Batches	Users with this permission level can submit batches of data to SEVIS. Only users with <i>Upload and Download SEVIS Batches</i> and <i>Sign/Approve SEVIS Events</i> permissions can view the SEVIS Management Console from the ISSM Main Menu.	Ordinarily, only the PDSO would be given this access level. SEVIS regulations stipulate that the only the PDSO can submit batches to SEVIS (the PDSO's username is included in every batch that gets submitted to the USCIS). For some schools, it is restrictive to only allow the PDSO to submit SEVIS batches. Consequently, this permission level can be assigned to non-PDSOs, and they will be able to submit batches on the PDSO's behalf. Carefully consider the potential ramifications of granting this permission to non-PDSO users: the PDSO will be legally responsible a batch, regardless of who uploaded it.
Sign/Approve SEVIS Events	Allows the user to review, modify, approve, or remove pending SEVIS events for individuals owned by the selected department.	Typically, this permission is granted to DSO users. In most implementation models, the DSO will trigger SEVIS events and add them to batches, which the PDSO will then approve or deny, and subsequently upload to the USCIS.
Create Forms	Allows the user to create, view, modify, or delete forms and records. Although <i>Create Forms</i> users can enter data into forms, they will not be able to access SEVIS events.	This permission most closely corresponds to the now-defunct ADSO position. This level of access permission should be given to staff who are authorized to generate new documents, or to issue replacements.
Read/Write	Allows the user to view, modify, or delete forms and records owned by the selected department. <i>Read/Write</i> users can create new records.	This permission should be assigned to personnel who work in the client intake process, or who enter data to update existing records.
View	Allows the user to view forms and records owned by the selected department.	Front-desk personnel who do not need to work directly with student records.

Permission Level	Description	Typical Usage
None	Denies the user access to all forms and records for the selected department.	IT Personnel maintaining the ISSM server or configuring the application. Anyone who wouldn't normally be allowed to view the student or scholar records.
Edit/Delete Reports (Report Writer)	Allows the user to create, run, modify, delete and un-delete Report Writer reports for the department.	PDSO/RO users or advisors working in a supervisory role. Application administrators who have access to student or scholar records. For more information about Report Writer settings, refer to <a href="#">“The Report Writer”</a> .
Run/View Reports (Report Writer)	Allows the user to create and run Report Writer reports for the department, but does not allow them to delete or un-delete them.	Advisors who will create their own reports, and may periodically need to run other users' reports. For more information about Report Writer settings, refer to <a href="#">“The Report Writer”</a> .
None (Report Writer)	Does not allow the user any access to Report Writer reports for the department.	Users that would normally receive <i>None</i> permissions for the department's records. For more information about Report Writer settings, refer to <a href="#">“The Report Writer”</a> .

## Modifying existing users

Use the following instructions to modify an existing user.

1. Go to the **Manager User Permissions & Roles** page.

2. Locate the user in the list.

3. Click **Edit Info**:

To modify user information:

- Click **Edit Info** under **Edit User**.
- Click **Edit Info** under **Edit Permissions**.

4. Make changes and click **Save**. Changes to user information and permissions will take effect the next time the user logs in.

## Deleting a user

Use the following instructions to remove an user from the system.

1. Open the Enterprise Manager and click **Manager User Permissions & Roles**.
2. Locate the user and click **Delete**. ISSM asks for confirmation. Once deleted, the user is immediately removed from the system.



### Warning

Once deleted, the usernames cannot be reused. Only delete a user if there is no doubt that he or she will not need to access the ISSM database in the future. ■

## Managing form templates

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Users with **Create Forms** privileges can create templates for immigration forms. When working with information common to several individuals or across, it saves time to have a series of forms populated with pre-set information instead of manually entering the same information for each form.

The Form Template Manager creates new templates, edits existing ones, and deletes templates that are no longer used. The sections below explain these functions.

### Creating a form template

Use the following instructions to create a new form template.

1. Go to the Enterprise Manager menu page and click **Manage Form Templates**.
2. Click **Add New**, then click **Edit Info** corresponding to the form.
3. Enter a name for the form template in the data field at the bottom of the page.
4. Click **Add New**. Certain forms will have a **Description** drop-down menu. Choose the template's function from that menu.
5. Select the name of the school that will use the form from the **Select Campus** drop-down menu.
6. Select the name of the Designated School Official (DSO) from the **Select Signer** drop-down menu.
7. If the template contains information from another template, select it from the **Select Form Template** drop-down menu. Otherwise, choose **No Template**.

8. Click **Save** to open the form.

 **Note**

If all of the drop-down menus are set to their default values, the Template Creation Page opens a blank form. ■

9. Fill in the form, scroll down to the bottom of the page, and click **Save** when finished or click **Cancel** to return to the previous screen without making any changes.
10. Click **Save**. The PDF Creation Complete page appears. From here, you can view the template in PDF format or return to the **Manage Form Templates** page.

## Modifying an existing form template

Use the following instructions to modify a form template.

1. Go to the Enterprise Manager menu page and click **Manage Form Templates**.
2. Choose a form type from the menu.
3. Locate the template and click the corresponding **Edit Info**.
4. Make changes to the template, scroll down to the bottom of the page, and click **Save** when finished or click **Cancel** to return to the previous page without making any changes.
5. Click **Save**. The PDF Creation Complete page appears. From there, users can view the template in PDF Format or return to the **Template Manager**.

## Deleting a form template

Use the following instructions to delete a form template.

1. Go to the Enterprise Manager menu page and click **Manage Form Templates**.
2. Locate the type of form (I-140, etc.) and click the corresponding **Edit Info**.
3. Find the template and click **Delete**. The template will immediately disappear from the list.

 **Warning**

Once deleted, Form Templates cannot be recovered. Do not delete one without being sure that it will not be needed in the future. ■

## Managing E-mail alerts

E-mail alerts are sent to individuals with time-sensitive information pertaining to their visa status and profile. E-mail alerts can be configured to send information to different groups of individuals, and can be scheduled to be sent out in batches to large numbers of students. From Enterprise Manager you can select the E-mail Alert Manager option to create a new alert, edit and copy existing alert, and view a list of current alerts including alert history.

### Note

For more information about configuring and using E-mail Alerts, refer to Chapter 19, “Using E-mail Alerts, E-mail Blasts, and Form Letters” of the *ISSM Advisor Guide*.

## Creating an E-mail alert

Use the following instructions to create a new e-mail alert message.

1. Open the **Enterprise Manager** and click **Manage E-Mail Alerts**. The **E-mail Alert Manager** screen displays all current e-mail alerts.
2. To create a new e-mail alert click **Add New**. The **E-mail Alert Configuration** screen is displayed. This screen contains several fields used to create a new e-mail alerts. These fields are described in the following table:

Name	Function
Name	The name of the E-mail Alert. Each alert must have a unique name.
Alert Is Active (E-mail Will be Sent)	When checked, indicates that the alert is “Active” and that e-mails will be sent.
Alert Type	The type of alert such as Profile End Date or Passport Expiration Date.
Number of Days	Indicates how many days before or after the Alert Type event the e-mail alert will be sent. Alert messages can also be sent on the day of the event.
Send E-mail To Student/Scholar at the following E-mail Addresses	Multi-select field that allows the user to specify all the e-mail addresses to which the alert has to be sent.
Send E-mail To Academic Department Admin	When checked, sends a copy of the e-mail alert to the user designated as the administrator for the department sending the alert.
Send E-mail To Additional Address	When checked, sends the e-mail alert to the addresses in the Send E-mail To Additional Address section. There are spaces for each department in ISSM.

Name	Function
Configuration Parameters	Indicates which individuals will receive the e-mail alert. Can send messages based on department, database status, profile status, profile type, profile subtype, DataLink Active, J-Visitor category, and total months allowed in program.
E-mail From Address	The address to which replies to the alert can be sent. Alert content can be set with the tags listed in the View Content Tag Guide pop-up window. <i>This field must contain a valid e-mail address or the alert will not be sent.</i>
E-mail Subject Line	The subject line for the e-mail alert message. Alert content can be set with the tags listed in the View Content Tag Guide pop-up window.
E-mail text	The text of the e-mail alert message. Alert content can be set with the tags listed in the View Content Tag Guide pop-up window.

- Once you have filled in the fields on this screen with the appropriate values, click **Save** to save the information you entered. The list of e-mail alerts will be immediately updated to include new alert information. If you don't want to save the information, click **Cancel**.

## Modifying e-mail alerts

Use the following instructions to modify a previously created e-mail alert.

- Click **Enterprise Manager**, followed by **Manage E-Mail Alerts**. On the **E-mail Alert Manager** screen the current list of e-mail alerts is displayed. You can sort the e-mail alerts based on **Name**, **Alert Type**, **Configuration**, **Status**, and **Number of Days**.
- Locate the name of the alert you want to modify from the list and click the corresponding **Edit Info**.
- The **Edit E-mail Alert Configuration** screen displays. From this screen, you can edit information associated with the alert. For example, you can designate the e-mail alert to be sent to an additional address or change the day on which the alert is sent.
- Modify the information as appropriate and click **Save** to update the alert.

## Copying e-mail alerts

Use the following instructions to copy a previously created e-mail alert.

1. Click **Enterprise Manager**, followed by **Manage E-Mail Alerts**. On the **E-mail Alert Manager** screen, the current list of e-mail alerts is displayed.
2. Locate the name of the alert you want to copy from the list and click the corresponding **Edit Info**.
3. The **Edit E-mail Alert Configuration** screen displays. Click **Copy** to copy the alert.
4. You will see a confirmation message, “You are now ready to copy this alert.” click **OK** to continue.
5. Enter a new alert name and modify any additional information as appropriate and click **Save** to save the new alert.

## Viewing alert histories (previously sent alerts)

Use the following instructions to view a list of previously sent e-mail alerts.

1. Click **Enterprise Manager**, followed by **Manage E-Mail Alerts**. On the **E-mail Alert Manager** screen the current list of e-mail alerts is displayed. You can sort the e-mail alerts based on **Name**, **Alert Type**, **Configuration**, **Status**, and **Number of Days**.
2. Locate the name of the alert you want to view from the list and click the corresponding **View Alert History**.
3. Enter a range of dates in the **Send Date** field and click **Submit**.

### Note

Users will not be able to see the detailed e-mail alert and record-level information for records that the user does not have at least Read Only permission. The links and checkboxes will be disabled for those records. ■

4. When finished viewing alert history, click **Return to Alert Manager** to return to the previous screen.

### Note

The list of alerts can be sorted by **Name**, **Subject**, **Send Date Status**, **Dismissed**, by clicking on the column headers at the top of the page. You can also select the **Check All** option. ■

## Scheduling e-mail batches

ISSM sends e-mail batches to students and scholars using a Windows batch file on the ISSM application server. This file can be scheduled to run daily, weekly, monthly, or at a single time. ISSM recommends that the batch file be scheduled to run once daily, at a time outside of normal business hours, so that server performance is not effected.

When sent, the e-mail alert messages will be sent as a series of messages sent to each individual on the list, not as a single message that is copied to multiple people.

Use the following instructions to schedule e-mail batches.

1. Open the **Windows Control Panel** by clicking **Start > Settings > Control Panel**.
2. Double-click **Scheduled Tasks**, then double-click **Add Scheduled Task**.
3. Follow the Scheduled Task Wizard's instructions to schedule the *fsaATLAS\VBScript\SendEMail.bat* file. ISSM recommends that the batch file be scheduled to run once daily, at a time outside of normal business hours, so that e-mail messages are sent regularly and that data access will not be interrupted.
4. After scheduling the file, right-click the **SENDEMAIL** scheduled task and select **Properties**.
5. Select the **Schedule** tab and click **Advanced**.
6. Check the **Repeat Task** box and enter a values in the **Duration** fields. ISSM recommends that the batch file be allowed to run for 1 to 2 hours (depending on server and network performance) so that it can process the entire message queue. For example, the batch may be scheduled to run for two hours per day, starting at 9:30 PM.
7. Click **OK** to commit the changes and dismiss the **Advanced Schedule Options** dialog box.
8. Click **OK** to commit the changes and dismiss the **Send EMail Properties** dialog box.

### **Note**

Scheduling e-mail batches requires Administrator access to the ISSM application server; contact IT personnel for access to the server if you do not have the necessary user permissions. ■

## Managing e-mail blasts

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The Manage E-mails Blasts option on Enterprise Manager allows users with assigned permissions to manage e-mail records generated using E-mail Blast including the ability to

view e-mail history and content. Permission to use this function is assigned by the system administrator via the Configure User Permissions and Roles menu.

Use the following instructions to manage e-mail blast.

1. From **Enterprise Manager**, click **Manage E-mail Blasts**.
2. From the **E-mail Blast Manager** screen, you can view a list of the history of all e-mail blasts created within ISSM. You can sort and filter the list based on the **Generated On, Generated By, Subject, and # of Recipients** columns. The default sort order is descending on the **Generated On** column.
3. To view details of a specific e-mail blast, click the **View Details** link. The **E-mail Blast Details** screen displays.
4. From the E-mail Blast Details screen, you can obtain general information pertaining to the e-mail blast including the date and time the e-mail was generated, who generated it, and the subject of the e-mail.

 **Note**

Users will not be able to see the detailed e-mail alert and record-level information for records that the user does not have at least Read Only permission. The links and checkboxes will be disabled for those records. ■

5. Also displayed, is a list of e-mails generated by the corresponding e-mail blast. You can sort and filter this information using the **Process On, Status, Recipient Name, and Recipient E-mail** columns.
6. To view details of an e-mail sent to a specific student, click the **Recipient Name** to open the selected student's record in **Record Navigator**.
7. To update the e-mail status to canceled:
  - For an individual e-mail - select the individual e-mail(s) that you would like to cancel by clicking the corresponding checkbox under the **Cancel E-mail** column.

OR

  - For all e-mails in the blast - click the checkbox in the Cancel E-mail column header to select all e-mails.

Then, click **Cancel Checked E-mails**. A message displays asking: "All selected e-mails will be cancelled and will not be sent to the recipients. Are you sure?" Click **OK** to cancel the selected e-mails, or click **Cancel** to exit the screen without changing the e-mail status to cancelled.

# Managing form letters

Watermarks and form letters are two components available in the Enterprise Manager for creating letters in a standardized format that may be sent to individuals or to a large number of recipients. Using the form letter feature, you can add text to a form letter and customize with the student or scholar data with the available Content Tag Guide. You may also add a watermark (text that appears beneath the body of the document) to further customize the form letter. For example, you may create a letter that you want a copy to go to the student, department, and the international office. Use a different watermark for each of these copies.

## Note

You must have the *Manage Form Letters* permission to Create Form Letters to access the Manage Form Letters and Manage Watermarks features.

The **Record Navigator** can generate form letters to send to students, scholars, or any other individuals in the ISSM database. These form letters can be created on an ad-hoc basis as they are needed, or can be based upon templates created with the Enterprise Manager's **Manage Form Letters** option. The subsections below explain how to create, modify, and delete form letter templates.

## Viewing a list of form letters

You can view a list of the existing form letters on the **Manage Form Letters** page in the Enterprise Manager. From this page you can add new form letters or edit existing form letters.

Letter Name	Private?	Watermark Used?	Created By	Created On	Delete
Student Orientation	No	No	Advisor First Name Advisor Last Name	7/25/2012	Delete
Welcome to Ellucian Univ	No	No	Advisor First Name Advisor Last Name	7/25/2012	Delete

Figure 17: Manage Form Letters page

The fields on this page are explained in the table below:

Field	Function
Letter Name	The name of the form letter. Default sort order is based on this text. Click this name to edit the details of the watermark.
Private?	Indicates whether or not the form letter is private (Yes) or public (No).
Watermark Used?	Indicates whether or not the form letter has one or more watermarks attached to it (Yes or No).
Created By	Name of the user who created the form letter.
Created On	Date that the form letter was first created.
Delete	Click to remove the form letter. A popup appears to confirm the removal of this form letter.  <b>Note:</b> Once a form letter template has been deleted, it cannot be recovered. Do not delete a form letter template without being sure that it is no longer needed

## Creating or editing a form letter

Use the following instructions to create or edit a form letter template.

1. Click **Add Form Letter** or click the name of an existing form letter. The Add/Edit Form Letter page appears:

Figure 18: Add or Edit Form Letter page

2. Fill in the contents of the **Add/Edit Form Letter** page. The fields on the page are explained in the table below.

Field	Function
Form Letter Name	The name of the form letter. All form letters must have unique names.
Private?	When checked, indicates that the form letter template will only be available for the user who created it. Other users will not be able to see the template when creating their own form letters.
Output Type	By default this is set to Microsoft Word and cannot be changed.
Letter Template	<p>Select a document template that will be used with the form letter. This template may contain your institution’s logo, standard text, and other components. The supported file formats are Microsoft .DOC and Microsoft .DOT.</p> <ul style="list-style-type: none"> <li>To locate a template, click <b>Browse...</b>, navigate to the template, then click <b>Open</b>.</li> <li>To un-attach a template already assigned to this form letter, click <b>Remove Template</b> to remove it. The template is immediately removed from the form letter.</li> </ul> <p><b>Note:</b> If you will be attaching a watermark, be sure that the text in your template does not have a colored background. This would prevent the watermark from being visible.</p> <p>When you attach the Microsoft Word template and save the form letter, a copy of the template is saved in a directory (...<i>FormLetter\DocTemplates</i>) on the server.</p> <p>When you remove a template from a form letter, the template file is permanently removed from the server (...<i>FormLetter\DocTemplates</i>).</p>
Use Watermark?	When checked, indicates that the form letter uses a watermark.
Pick Your Watermark	When the “Use Watermark?” option is checked, a list of the existing watermarks in ISSM appears. To create, edit, or delete watermarks refer to the <a href="#">“Managing watermarks”</a> section.
Form Letter Content	Contains the contents of the form letter.

Field	Function
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Content Editor: Use this to enter and format text.

**Note:** If you format a tag (Refer to Chapter 16, “The Content Tag Guide” of the *ISSM Advisor Guide*.), be sure to highlight the entire tag (\$tag\$) or the format will not take effect.

If you also have a Microsoft Word template attached to this form letter, and the template contains information in the body of the document, then any content you add here to the form letter will begin one line below the text already in the template.

The following is a brief description of the available buttons in this editor:

Main Toolbar Options		Insert Options	
	Print Letter Content		Insert Table
	Find and Replace		Insert Symbol
	Cut		Remove the formats
	Copy	<b>Tools Options</b>	
	Paste		Left Justification
<b>B</b>	Bold Text		Center Justification
<i>I</i>	Italic Text		Right Justification
<u>U</u>	Underline Text		Remove Justification
<b>Formatting Options</b>			Indent
	Text Color		Outdent
	Background Color		Ordered (numbered) List
			Unordered (bulleted) List

Content Tag Guide: Use this to insert student or scholar-specific information, such as names, dates of birth, etc. into the letter. Refer to Chapter 16, “The Content Tag Guide” of the *ISSM Advisor Guide*.

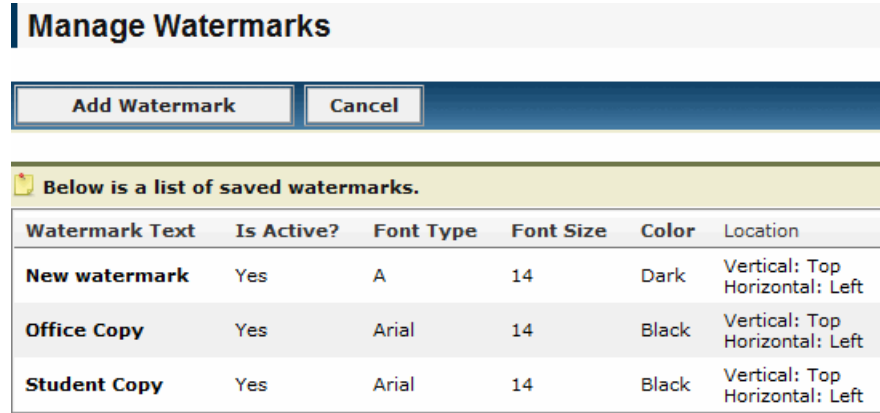
After creating the template, click **Save**. The template will immediately appear in the list of form letter templates.

## Managing watermarks

You can create watermarks in ISSM that can be added to a form letter template.

## Viewing a list of watermarks

You can find a list of the existing watermarks on the **Manage Watermarks** page in the Enterprise Manager. From this page you can add a new watermark or edit an existing watermark.



**Figure 19: Manage Watermarks page**

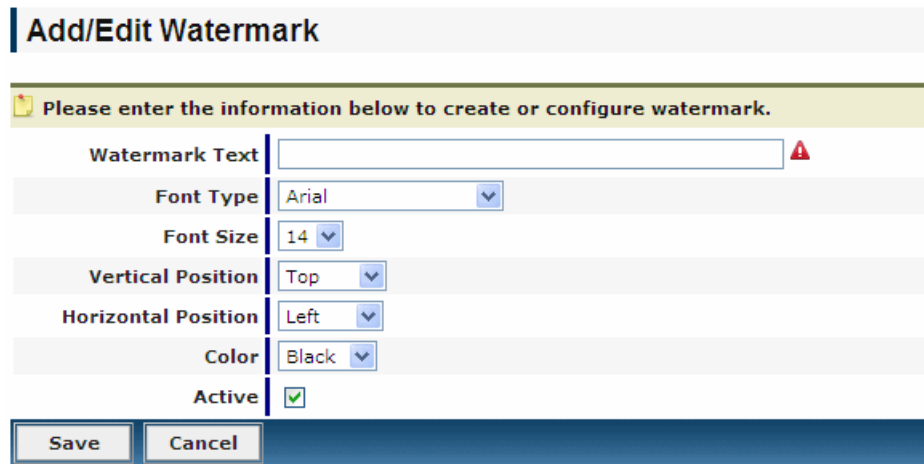
The fields on the page are explained in the table below.

Field	Function
Watermark Text	The name of the watermark. Default sort order is based on this text. Click this name to edit the details of the watermark.
Is Active?	Determines whether or not a watermark will be available for attaching to a template or will appear in the template if inactive after it is attached. When checked, the watermark is available and visible when attached to a form letter.
Font Type	The font used by the watermark.
Font Size	The size of the font used in the watermark.
Color	The color of the font used in the watermark.
Location	The horizontal and vertical position of the watermark. Vertical: Top, Center, or Bottom Horizontal: Left, Center, or Right

## Creating or editing a watermark

Use the following instructions to create or edit a watermark.

1. Go to the Enterprise Manager and select **Manage Watermarks**.
2. Click **Add Watermark** to create a new watermark or click a watermark name/text to edit it. The **Add/Edit Watermark** page appears.



The screenshot shows the 'Add/Edit Watermark' form. At the top, there is a title bar 'Add/Edit Watermark'. Below it is a yellow banner with a folder icon and the text 'Please enter the information below to create or configure watermark.' The form contains several fields: 'Watermark Text' (a text input field with a red warning icon), 'Font Type' (a dropdown menu showing 'Arial'), 'Font Size' (a dropdown menu showing '14'), 'Vertical Position' (a dropdown menu showing 'Top'), 'Horizontal Position' (a dropdown menu showing 'Left'), 'Color' (a dropdown menu showing 'Black'), and 'Active' (a checked checkbox). At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 20: Add or Edit Watermark page

3. Enter the information for the watermark. The fields on the page are explained in the table below.

Field	Function
Watermark Text	The name of the watermark. Default sort order is based on this text. This is a required field.  Click this name to edit the details of the watermark.
Font Type	The font used by the watermark.  The available fonts and their order are determined by the ISSM Enterprise Manager's "Maintain Select Box Values" option. If you have permissions to "Maintain Select Box Values," you may add new or edit available sizes in the "Watermark Font Types" option.

Field	Function
Font Size	<p>The size of the font used in the watermark.</p> <p>The available sizes and their order are determined by the ISSM Enterprise Manager’s “Maintain Select Box Values” option. If you have permissions to “Maintain Select Box Values,” you may add new or edit available sizes in the “Watermark Font Sizes” option.</p>
Vertical Position	Select the vertical position of the watermark: Top, Center, or Bottom.
Horizontal Position	Select the horizontal position of the watermark: Left, Center, or Right.
Color	<p>The color of the font used in the watermark.</p> <p>The available colors and their order are determined by the ISSM Enterprise Manager’s “Maintain Select Box Values” option. If you have permissions to “Maintain Select Box Values,” you may add new or edit available sizes in the “Watermark Font Colors” option.</p> <p><b>Note:</b> When you enter a color name, be sure that it is a name that the browser can recognize (for example, “lime”). There are many available Web sites to help you with the acceptable names.</p>
Is Active?	Check this to make the watermark available for attachment to form letters and remain visible when attached to a form letter.

- When finished with the watermark, click **Save**. The watermark immediately appears in the list of watermarks.

## Deleting a watermark

You cannot permanently delete a watermark. However, you may make an existing watermark inactive so it can not be attached to a template or inactivate a watermark already attached to a template so that it does not appear when the template is used.

To inactivate a watermark, edit a watermark and uncheck the **Is Active?** check box.

## Delete records

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The **Delete Record** option on **Enterprise Manager** allows users with assigned permissions to permanently delete a record from the ISSM database. Permission to use this feature is assigned by the system administrator via the Configure User Permissions and Roles menu. Only records which belong to the department that the user has at least *Read/Write* permission to, are listed and eligible to be deleted.

Use the following instructions to delete a record(s).

1. From **Enterprise Manager**, select **Delete Records**.
2. From the **Delete Record** screen, enter filter criteria to search for the record (s) you want to delete. You can filter on the **Campus ID, SEVIS ID, Last Name, First Name, Date of Birth, and Security Department** fields.
3. Select the record (s) you want to delete, and click the **Delete** link. A message will display: “Are you sure you want to delete the selected record? This will cause the record to be permanently deleted from ISSM and the process is irreversible. Click **OK** to continue or **Cancel** to return to the previous screen.”
4. To proceed with the deletion, click **OK**. To cancel the deletion process and return back to the **Enterprise Manager** screen, click **Cancel**.

## ISSM Configuration options

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### Maintaining select box values (drop-down menus)

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Use the **Maintain Select Box Values** option to configure drop-down menus. Not all of the lists in ISSM can be modified by end users. New lists cannot be created, and unused lists can not be removed. To add a menu for content that is not normally found in ISSM, create a custom field for the information.

 **Note**

The Academic Department list located under **Enterprise Manager > Configure Academic Departments** also appears in the “Appointment Data” section of the Profile tab in J-1 records. If schools use those fields, they are configured from that location.

The Academic Department list located under **Enterprise Manager > Maintain Select Box Values** appear in the Academic Information section

of the **Profile** tab. If schools use those fields, they are configured from here. ■

When modifying a drop-down menu, the user has several options, as outlined in the table below.

Option	Sub-Option	Function
Add an Item	Display Text	The way the list item appears in the ISSM application.
	Value (If Different than Display Text)	The way the list item appears in the database; if left blank, the item will match the <i>Display Text</i> value.
Modify or Remove an Item	Display Text	The way the list item appears in the ISSM application.
	Value (If Different than Display Text)	The way the list item appears in the database; if left blank, the item will match the <i>Display Text</i> value.
	INS Code (for SEVIS Use)	The CIP code for the item, if applicable.
	<i>Open Doors</i> Value	The Open Doors code for the item, if applicable.
	STEM Eligible	Identifies whether the major is STEM eligible for the purpose of approving a 17-month STEM extension of optional practical training.
Set as Default	Current Default	The default value of the drop-down list.
		Replaces the <i>Current Default</i> item as the list's default value.

## Adding items to lists

Use the following instructions to add a new item to a drop-down menu.

1. Open the menu (**Main Menu > Enterprise Manager > Maintain Select Box Values > [Name of Menu]**).
2. Locate the **Add an Item** section.
3. Enter the name of the item in the **Display Text** field.

4. If necessary, enter a value in the **Value (If Different than Display Text)** field or any other field(s).
5. Click **Save**. The changes will be immediately reflected in the drop-down menu.

 **Note**

Changing the contents of a drop-down menu will not change the records that use the drop-down menu. For instance, changing the Major of “Computer Science” to “CS” will only change the menu. The records of Computer Science majors will read “Computer Science (legacy)” after the change. ■

## Adding CIP codes

When ISSM uploads certain information to SEVIS, such as majors and subject field codes, it uses CIP codes to format the information. In most cases, ISSM already contains the CIP codes. In some cases, the user must add or modify a CIP code.

Use the following instructions to add CIP code.

1. Open the menu (**Main Menu > Enterprise Manager > Maintain Select Box Values > [Name of Menu]**).
2. Select the list item from the drop-down menu.
3. Locate the **Modify or Remove an Item** section.
4. Enter the CIP code in the **INS Code (for SEVIS Use)** field.
5. Click **Save**. The changes will be immediately reflected in the drop-down menu.

## Updating STEM eligibility

When identifying whether a student can apply for a STEM extension of optional practical training, the advisor can use the STEM eligible field located within the optional practical training work authorization record. Majors that are STEM eligible must be updated in ISSM by the user before this field will be updated in the work authorization record. If the major is not STEM eligible, this field can be left blank, and will be displayed in the work authorization record as *No*. For additional information on which majors are STEM eligible, please visit the following Web site: <http://www.ice.gov/sevis/stemlist.htm>

Use the following instructions to update STEM eligibility.

1. Open the menu (**Main Menu > Enterprise Manager > Maintain Select Box Values > Majors**).
2. Select the list item from the drop-down menu.

3. Locate the **Modify or Remove an Item** section.
4. Update the dropdown value to 'Yes' in the STEM Eligible field.
5. Click **Save**. The changes will be immediately reflected in the drop-down menu.

### **Deleting a menu item**

Use the following instructions to delete a menu item.

1. Open the menu (**Main Menu > Enterprise Manager > Maintain Select Box Values > [Name of Menu]**).
2. Select the list item from the drop-down menu.
3. Locate the **Modify or Remove an Item** section.
4. Click **Delete**. ISSM will ask for confirmation; click **Yes** to delete the menu item, click **No** to leave it on the list.

### **Modifying an existing menu item**

Use the following instructions to modify an existing menu item.

1. Open the menu (**Main Menu > Enterprise Manager > Maintain Select Box Values > [Name of Menu]**).
2. Select the list item from the drop-down menu.
3. Locate the **Modify or Remove an Item** section.
4. Make any desired changes to the item and click **Save** to update the list.

### **Setting default values for menus**

Use the following instructions to set default values for menus.

1. Open the menu (**Main Menu > Enterprise Manager > Maintain Select Box Values > [Name of Menu]**).
2. Select the list item from the drop-down menu; it will appear in the **Set as Default** section.
3. Click **Save** to assign the new default item; click **Delete** to leave the list's default value blank.

## Ordering menus

By default, drop-down menus are sorted in alphabetical order.

Use the following instructions to order menus.

1. Open the menu (**Main Menu > Enterprise Manager > Maintain Select Box Values > [Name of Menu]**).
2. Scroll to the bottom of the page and click **Adjust Priority**.

### Note

There are data fields to the right of each list entry; their default value is zero. To place a menu item at the top of the list, type 1 in the box. The number typed in the box corresponds to the item's position in the list (an item with a 2 goes second in the list, one with a 3 goes third, etc.). The remaining items will be listed alphabetically after the user-sorted items. For example, if a menu contains "Engineering," "Architecture," "Chemistry," "Biology," and "Dentistry," the default order would be: Architecture, Biology, Chemistry, Dentistry, Engineering. If the value of "Engineering" is set to 1, the value of "Dentistry" is set to 2, and the other values are left at 0, the new order will be: Engineering, Dentistry, Architecture, Biology, Chemistry. ■

## Maintaining custom fields

The Enterprise Manager can create new data-entry fields and programmable drop-down menus to store information that is not normally held in the ISSM database.

### Creating custom fields

Use the following instructions to create a custom field.

1. Go to the **Enterprise Manager** and click **Maintain Custom Fields**.
2. Click **Add New** and format the custom field with the options described in the below table:

Option Name	Type	Function
Name	Data-Entry Field	The name of the custom field
System Name	Data-Entry Field	The name ISSM uses to identify the field. It can only contain alphanumeric characters, and cannot contain spaces.
Data Type	Drop-down Menu	Makes the custom field a date, a number, an integer, or a text string.

Option Name	Type	Function
Tab Location	Drop-down Menu	Assigns the field to a Record Navigator tab.
Select Type	Drop-Down Menu	Determines whether the new item will appear as a data-entry field (None), a drop-down menu (Mandatory), or a drop-down menu with an option for manually entering data (Optional)

3. Click **Save** to update the database or click **Cancel** to return to the previous screen without making any changes.
4. If the custom field has a Select Type of **Mandatory** or **Optional**, enter values for the custom field drop-down and click **Add**.
5. To Delete the select value, click the **Delete** button next to the value you wish to delete.

## Modifying custom fields

Use the following instructions to modify an existing custom field.

1. Go to the **Enterprise Manager** and click **Maintain Custom Fields**.
2. Locate the field and click on the field **Name** to edit.
3. Make changes to the field and click **Save**.

## Deleting custom fields

Custom Fields cannot be removed from the database. However, they can be deactivated by the following process:

1. Go to the **Enterprise Manager** and click **Maintain Custom Fields**.
2. Locate the field and click on the field **Name** to edit.
3. Set the **Tab Location** field to *None/Deleted*. Once the menu has been deactivated, it will not be visible in the Record Navigator. Deactivated menus can be reactivated at a later time.

# Campus DataLink configuration

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There are two Campus DataLink configuration settings in the Enterprise Manager: **DataLink Active Fields** and **Code Table Mapping**. The subsections below contain brief overviews of how these configuration settings work in the overall context of the Campus DataLink process. For an in-depth explanation of the Campus DataLink as well as step-by-step instructions about configuring and using it, please refer to the Campus DataLink documentation in the *ISSM Technical Guide*.

## DataLink active fields

The Campus DataLink will only update fields that are **DataLink Active**. Use the **Configure Campus DataLink Active Fields** option for setting the **DataLink Active** status of fields. For more specific information about this process, refer to Chapter 9, “Campus DataLink Instructions” in the *ISSM Technical Guide*.

## Code table mapping

The values extracted from the campus database must be mapped to the ISSM values. For instance, the school may store the value for the Computer Science major as “CS.” The user must set up the **Campus DataLink Code Table Mapping** section of the Enterprise Manager, so that ISSM knows how to translate “CS” to “Computer Science” in ISSM. For more specific information about this process, refer to Chapter 9, “Campus DataLink Instructions” in the *ISSM Technical Guide*.

# Configuring campuses and departments

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The **Configure Campus/Department Structure** option sets institutional information used for record ownership and SEVIS batching. ISSM records are owned by departments, which are then owned by campuses. User permissions are determined along departmental lines, and SEVIS batches are sorted by campus.

The campus structure should be set up to suit the foreign student office’s workflow practices, and does not necessarily need to be a mirror of the school’s institutional structure. For more information about strategies regarding campus setups, refer to the *ISSM Advisor Guide*.

## Creating campuses

Use the following instructions to create a Campus.

1. Go to the Enterprise Manager menu and open the **Configure Campus/Department Structure** page.
2. Fill in the data-entry fields, as outlined in the table below.

Field Name	Function
Campus Name	The name of the campus (ex. <i>Name Of University</i> ).
SEVIS F/M School Code	The Campus' SEVIS School Code for F-1/M-1 students (e.g. <i>SEA214F12345678</i> ).
SEVIS J School Program Number	The Campus' Program Number for processing J-1 records. This value functions in the same manner as the SEVIS School Code, except it applies to J-type batch transfers (e.g. <i>A-1-12345</i> ).
SEVIS PDSO's User Id (for F/M school)	The SEVIS User ID of the PDSO (e.g. <i>tpdso-1234</i> ).
SEVIS RO's User Id (for J school)	The SEVIS User ID of the RO. This value functions in the same manner as the PDSO's SEVIS User ID, except it applies to J-1 batch transfer (e.g. <i>rtest12345</i> ).
SEVIS Files Upload Directory	When ISSM creates batch upload XML files, they are written to this directory and are eventually uploaded to SEVIS (e.g. <i>C:\fsaATLAS\YourUniversityName\SevisTransfer\Upload</i> ).
SEVIS Files Download Directory	When I-20/DS-2019 PDF forms are downloaded from SEVIS, they are stored on this server. The "Virtual Directory Alias Name for SEVIS Documents" virtual directory mentioned below points to this directory, and allows ISSM users to access the PDF files through the web application (e.g. <i>C:\fsaATLAS\YourUniversityName\SevisTransfer\Download</i> ).
SEVIS Files Working Directory	ISSM downloads SEVIS batches as ZIP archive files. Upon initial download, it places them in this directory and then extracts the PDF files to the "SEVIS Files Download" directory (e.g. <i>C:\fsaATLAS\YourUniversityName\SevisTransfer\DownloadTemp</i> ).
Verisign Certificate Location and Filename	ISSM uses a Verisign Digital ID (Certificate) to authenticate and communicate with the SEVIS server. The location of the certificate should be entered in this field (e.g. <i>C:\fsaATLAS\YourUniversityName\SevisTransfer\SEA214F12345678.cer</i> ).
Virtual Directory Alias Name for SEVIS Documents	The Virtual Directory that maps to the "SEVIS Files Download Directory" as mentioned above. Only the name of the virtual directory (not its URL, or the directory to which it points) should be entered in this field (e.g. <i>SEVISPDFDocuments</i> ).

3. Click **Save** when finished or click **Cancel** to return to the previous screen without making any changes. The new campus immediately appears in the list of campuses.

## Modifying campuses

Use the following instructions to modify properties of existing campuses.

1. Go to the Enterprise Manager.
2. Click **Configure Campus/Department Structure**.
3. Locate the campus and click the corresponding **Edit Info**.
4. Make changes to the campus' information and click **Save** when finished. The changes will immediately take effect. Click **Cancel** to return to the previous screen without making any changes.

## Creating departments

Use the following instructions to add a new department.

1. Go to the Enterprise Manager.
2. Click **Configure Campus/Department Structure**.
3. Click **Add New** on the **Edit Departments** menu. This will open the **Edit Departments** page.
4. Enter a name for the new department in the **Name** field and choose a campus from the **Campus** drop-down menu.
5. Click **Save** when finished. The new department will appear in the **Active Departments** list and in drop-down menus containing department information. Click **Cancel** to return to the previous page without making any changes.

## Modifying departments

Use the following instructions to edit the name of a department or to re-assign it to a different school.

1. Go to the Enterprise Manager.
2. Click **Configure Campus/Department Structure**.
3. Find the department and click the corresponding **Edit Info**. This will open the **Edit Departments** page.
4. Make changes to the department's information and click **Save** when finished. The changes will immediately take effect.

# Configuring employers

The **Configure Employers** section of the Enterprise Manager modifies employer information for I-129 and I-140 form templates. Create an employer list to save time and avoid errors when generating forms.

## Creating an employer

Use the following instructions to add a new employer.

1. From the Main Menu, click **Enterprise Manager**, then click **Configure Employers**.
2. Click **Add New**. The following list explains the data fields on the Edit Employer Information page:

Field Name	Field Type	Function
Employer Name	Data Field	The Employer's name.
Type of Business	Data Field	The Employer's industry.
NAICS Code	Data Field	The Employer's NAICS code.
Date Established	Data Field	The date (MM/DD/YYYY) when the Employer's company was founded.
Number of Employees	Data Field	The number of people who work for the Employer.
Gross Income	Data Field	The Employer's gross annual income.
Net Income	Data Field	The Employer's net annual income.
If Individual, Occupation	Data Field	The job the individual will be performing, if the employer will only be using a single student or scholar.
Annual Income	Data Field	The individual's salary.
IRS Tax Number	Data Field	The Employer's Internal Revenue Service (IRS) Tax ID number.
Petitioner US Citizen	Check Box	Indicates whether or not the Employer is a US Citizen
Petitioner Org	Check Box	Used with the I-129 form.
Petitioner Other	Check Box	Used with the I-129 form.

### Note

Only the **Employer Name** field is required; the other fields can be left blank if the information is unavailable.

3. Enter all available information and click **Save** to add the employer to the list. The Employer's name will appear in the Employer drop-down menus used with I-129 or I-140 form templates.
4. Click **Cancel** to return to the previous screen without making any changes.

## Editing an existing employer

Use the following instructions to change an employer's information:

1. From the Main Menu, click Enterprise Manager, then click **Configure Employers**.
2. Locate the employer and click the corresponding **Edit Info**.
3. Make any necessary changes and click **Save** when finished.

## Deleting an employer

Although deleting the Employer will not effect any forms or records, deleted Employers cannot be recovered. Also, Employer names cannot be recycled.

Use the following instructions to delete an employer.

1. From the Main Menu, click the **Enterprise Manager**.
2. Click **Configure Employers**.
3. Locate the employer and click **Delete**. The employer immediately disappears.

## Academic department configuration

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The Academic Department list, which can be accessed from the Configure Academic Departments option, creates departments that are used with International Scholar Dossier. Refer to Configuring Academic Departments for instructions on creating Academic Departments.

### Note

The Academic Department list located under **Enterprise Manager > Configure Academic Departments** also appears in the Appointment Data section of the **Profile** tab in J-1 records. If schools use those fields, they are configured from here.

The Academic Department list located under **Enterprise Manager > Maintain Select Box Values** appears in the Academic Information

section of the **Profile** tab. If schools use those fields, they are configured from that location. ■

## Configuring academic departments

Not every department at the school should be considered an “Academic Department” within the context of International Scholar Dossier: there is no need to create an Academic Department for departments that do not process scholars with International Scholar Dossier.

### Note

The international office should perform the tasks outlined in this section. ■

Use the following instructions to create an academic department.

1. Go to **Enterprise Manager** and click **Configure Academic Departments**.
2. Click **Add New**.
3. Fill in the fields and click **Save** when finished. When properly filled in, the screen should resemble the following image.

**Figure 21: Edit Academic Department page**

4. Repeat this process to add additional departments.

Field Name	Description	Sample Values
Name	Name of the Academic Department	Physics Department
Password	Login password for the administration department	N/A; The password should contain a mix of letters and numbers so that it is difficult to guess.
Confirm Password	Password confirmation	N/A

Field Name	Description	Sample Values
Administrator Name	Name of the Department Administrator	John Doe
Administrator E-mail	Department Administrator's E-mail address	jdoe@university.edu
Department Head Name	Name of the Department Head/Dean	Jane Smith
Security Department	The ISSM Administrative Department that will review records submitted by this academic department.	International Students/Scholars Office

## Configuring the report writer

The Report Writer uses database “views,” which are subsets of the ISSM database, to determine which fields are available for reporting. For instance, the Report Writer includes views that list all of the fields in the Record Navigator’s Profile Tab, or all of an archive of all suppressed “Create Student” SEVIS events.

This structure may lead to situations where the application includes Report Writer views that certain schools do not need. For instance, a school without a J-1 program would have no need for a report view that lists all “Create EV” events. In these cases, the ISSM administrator can hide the unused reports so that they do not clutter user interfaces.

The Configure Report Writer section of the Enterprise Manager allows authorized users to download any available new database views on demand from the ISSM Web site, and to delete (and un-delete) any Report Writer views that aren’t being used.

### Note

For more information about the Report Writer’s design or use, refer to [“The Report Writer”](#).

## Deleting and un-deleting report writer views

At the abstract level, deleting and un-deleting Report Writer views determines which fields are available for Reporting.

Use the following instructions to remove a Report Writer view.

1. From the Main Menu, click the **Enterprise Manager**.
2. Click **Configure Report Writer**.
3. Click **Delete Report Type Definitions**.
4. Locate the report view(s) being deleted and check the **Delete** check box(es).
5. Click **Submit**.

 **Note**

Only report views that aren't being used in any active reports can be deleted. If ISSM shows a message that says "This Report Type is Used in an Active Report" next to a view, you must first delete all reports that use that view before the view itself can be deleted. ■

Use the following instructions to un-delete a Report Writer view.

1. From the Main Menu, click the **Enterprise Manager**.
2. Click **Configure Report Writer**.
3. Click **Delete Report Type Definitions**.
4. Locate the report view(s) being deleted and un-check the **Delete** check box(es).
5. Click **Submit**.

## Downloading the latest report writer views

Even though the application automatically downloads new Report Writer views periodically, you can still manually check to see if new ones are available.

Use the following instructions to manually download the latest Report Writer views.

1. From the Main Menu, click the **Enterprise Manager**.
2. Click **Configure Report Writer**.
3. Click **Manually Update Report Type Definitions**. ISSM displays the date and time of the last successful download attempt.

4. Click **Save**. ISSM downloads the new database views (if they are available) and will update the timestamp.

 **Note**

The Last Successful Download Attempt timestamp does not indicate that there were any new Report Writer views. It just indicates that your ISSM server was successfully able to communicate with the ISSM Web site and download the latest views. To view the list of Report Writer views, either use the Report Writer or go to the **Delete Report Type Definitions** section of the Enterprise Manager. ■

## Configuring PFS Settings

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The **Configure PFS Settings** (Privacy Fields Suppression) option on **Enterprise Manager** allows schools to configure the PFS setting on the field level, in addition to the existing global PFS mode. This provides greater flexibility with setting configurations to facilitate to the adherence to the regulatory reporting requirements.

Permissions to the function are assigned via the **Manager User Permissions & Roles** option on **Enterprise Manager**. The user permission is called Configure PFS Settings.

Use the following instructions to configure PFS Settings.

1. From the Main Menu, click **Enterprise Manager followed by Configure PFS Setting**. The Configure PFS Setting screen displays. Data is grouped first by the Event Name, in ascending order. You can sort the data in the **Event Name** and **Field Name** columns and can also filter on each row.
2. From this screen, select the SEVIS event name associated with the PFS field from the **Event Name** drop-down menu.
3. Select the **Field Name** which indicates the optional SEVIS field that is part of the PFS list.
4. Select **Send to SEVIS?** if you want the system to send the information of the associated field to SEVIS as part of the event. For example, if you check the **Country of Citizenship** field for the Add Dependent event, ISSM will send the Country of Citizenship data to SEVIS as part of the Add Dependent event, moving forward.
5. Click **Save** to save the information you entered.

 **Note**

The borders of some tables listing the configuration settings may not be displayed when using Internet Explorer 11. Check to ensure that the *Compatibility View* is turned **off** on the browser. Navigate to **Internet Options>Compatibility View** and de-select the **Display intranet sites**

in **Compatibility View** and **Use Microsoft compatibility lists** options to turn off the compatibility view. ■

## Configure application settings

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The **Configure Application Settings** option on **Enterprise Manager** allows users with assigned permissions to configure application setting information. Administrators and users with appropriate permissions can access the Configuration Application Settings screen from the Enterprise Manager screen to easily make changes to the application settings. The tables below provide details on the various application configuration settings.

 **Note**

The borders of some tables listing the configuration settings may not be displayed when using Internet Explorer 11. Check to ensure that the *Compatibility View* is turned **off** on the browser. Navigate to **Internet Options>Compatibility View** and de-select the **Display intranet sites in Compatibility View** and **Use Microsoft compatibility lists** options to turn off the compatibility view. ■

## Application Log & Trace Configuration

The table below lists the settings for Application Log & Trace Configuration:

Application Log & Trace Configuration Fields	Description
Application Log File Path	The directory where Campus DataLink log files from versions 6.1 and earlier are stored. As of ISSM 6.2, the application no longer generates Campus DataLink log files. If unsure of how this should be set, leave it set to its default value. If upgrading from a previous version, there is no need to change the value in this field.
Application Logging Level	Leave this option set to its default value unless instructed to change it by ISSM Customer Support. ISSM does not ordinarily generate log files. If upgrading from a previous version, there is no need to change the value in this field.
Application Trace File Path	The file path for the ISSM application trace file. The default value is C:\fsaATLAS\Log\trace.log

Application Log & Trace Configuration Fields		Description
Application Trace Level	The value represents the different trace level available for the ISSM application. The values are None, Errors, Warnings, Info, and Debug. The default value for this setting is None. Please refrain from changing this value without consulting ISSM technical support as it will seriously impact application performance.	
Maximum Log File Size	Leave this option set to its default value unless instructed to change it by ISSM Customer Support. ISSM does not ordinarily generate log files. If upgrading from a previous version, there is no need to change the value in this field.	

## Campus DataLink Configuration

The table below lists the settings for Campus DataLink Configuration.

Campus DataLink Configuration Fields	Value
Check DataLink Active During MEG Validation	<p>Indicates whether a field's DataLink Active setting is considered when processing a mass event generation. When checked, the DataLink Active setting is considered and a record that is DataLink Active is ineligible for a mass event generation. When not checked, the DataLink Active setting is not considered therefore this field does not affect a record's eligibility for a mass event generation.</p> <p>If a record is updated through DataLink Active, but this validation setting is not checked, then any changes you make through the mass registration event could be overwritten due to updates from the Campus DataLink.</p>
DataLink Batch Process User Id	The User ID associated with any SEVIS events that are generated when Campus DataLink imports are performed at the command line. If installing ISSM for the first time, enter user here. If upgrading to ISSM 7.5.0 from a previous version, enter either the ISSM application administrator or PDSO's username. Whatever username is entered here, it should have a valid SEVIS ID, otherwise events generated during command-line Campus DataLink processes are not valid.
DataLink Paging Size	Setting to define default value for the number of records displayed in the Campus DataLink Manager screen for new user settings. The default value is 200.

Campus DataLink Configuration Fields	Value
DataLink Schema and Extract File Path	The directory where Campus DataLink XML files are placed. If unsure of how this should be set, leave it set to its default value. If upgrading to ISSM 7.5.0 from a previous version, there is no need to change the value in this field.
Default Profile Status	Determines the default profile status for an incoming record in which the status has not already been defined. The default setting is “Pending.” Valid options include (spelling must be exact): “Active/Enrolled,” “Complete,” “No-Show,” “Pending,” “SEVIS - Active”, “SEVIS - Pending”, “Student Cancelled/EV Invalid”, “Terminated.”
Enable DataLink Case Sensitivity Check?	Indicates whether the DataLink processes incoming data using case sensitivity. When checked, the DataLink treats “value” and “Value” as different strings. When unchecked, it treats them as being identical. The default value for this field is checked
Enable DataLink Line Errors Suppression?	When checked, suppresses error reporting on non-DataLink Active Fields. Refer to <a href="#">“Campus DataLink configuration”</a> for further information about the Campus DataLink. If unsure of how this should be set, leave the box unchecked.
Map to Local Address Type	Determines the new e-mail address type that is mapped to the existing <i>Local</i> e-mail address type.
Map to Permanent Address Type	Determines the new e-mail address type that is mapped to the existing <i>Permanent</i> e-mail address type.
Map to Mailing Address Type	Determines the new e-mail address type that is mapped to the existing <i>Mailing</i> e-mail address type.

## Miscellaneous Configuration

The table below lists the settings for Miscellaneous Configuration.

Miscellaneous Configuration Fields	Description
Enable Field Auto Complete?	Check box indicating whether auto complete should be enabled for text boxes within the application. When the setting is unchecked the auto complete feature for all the text boxes will be disabled, while if the setting is checked the auto complete feature will be enabled for all the text boxes.
Header Text	Allows setting of text that will appear in the header of the application in large yellow block letters. Useful for specifying which machine a user is working on, etc.
Proxy Sever Address	The Report Writer periodically downloads a configuration file from the ISSM website. If the ISSM server is behind a proxy server, the proxy's IP address or URL must be entered here for the Report Writer to function properly. The default value of this field is blank, which indicates that no proxy server is used. If unsure how this field should be set, leave it blank.
Proxy Server Port	The port used by the ISSM server on the proxy server, as explained above. If unsure how this value should be set, leave it blank to indicate that the server does not use a proxy server. The default value is 8080.

## PDF Configuration

The table below lists the settings for PDF Configuration.

PDF Configuration Fields	Description
PDF E-mail Address Type	<p>The default e-mail address type that will be used to populate e-mail addresses in PDF forms.</p> <p>Valid e-mail addresses for this address type must exist if they are to be populated in forms.</p> <p>By default, the address type for this setting will be set to the same e-mail address type as in the <i>SEVIS E-mail - Address Type</i> setting under the <i>SEVIS Configuration</i> options. You can change the default setting.</p>
PDF Output Physical Path (Non SEVIS)	<p>By default, forms generated by ISSM will be written to this directory. Manually enter its location or click BROWSE to locate the directory (e.g. C:\fsaATLAS\PDF).</p>
PDF Output Virtual Path (Non SEVIS)	<p>The name of the virtual directory that IIS uses to host non-SEVIS PDF forms generated by ISSM. Generally, this is named PDF. This field can be left blank if the application is running in Stream PDF mode. If the application is not running in Stream PDF mode, you must enter a value in this field or the application will not function properly.</p>
PDF Template Path (Non SEVIS)	<p>The directory on the local machine in which templates for PDF files will be stored. Manually enter its location or click <b>Browse</b> to locate the directory (e.g. C:\fsaATLAS\PDF). If unsure of how to set this value, leave it set to its default.</p>
Stream PDF	<p>StreamPDF - Check box indicating weather or not to PDF paths are shown to the client. If unchecked, PDF viewing is done by virtual directory path. If checked, the virtual path directory is not used. If you leave this box unchecked, you must enter a value for the PDF Virtual Output Path (Non-SEVIS) field under the Web Server Information tab of the Server Configuration Utility, or the application will not function properly.</p>

## Portal Configuration

The table below lists the settings for Portal Configuration:

Portal Configuration Fields	Description
Default E-mail Address Type for Portal Account Creation	The e-mail address type that will be used to create the portal account for the student record and will be used to log in to the portal account. Select the e-mail address type from the drop-down list.
ISSO/Admin E-mail Address	The e-mail address for the International Student Office or the Student Portal Administrator.
ISSO/Admin Phone Number	The contact phone number for the International Student Office or the Student Portal Administrator.
Portal URL	The URL for the Student Portal.
Submit for Approval Recipient E-mail Address	The e-mail address of the advisor to whom documents uploaded on the portal will be sent for approval.

## Report Writer Configuration

The table below lists the settings for Report Writer Configuration.

Report Writer Configuration Fields	Description
Report Type Download Time Out (milliseconds)	The time limit (in milliseconds) that determines when ISSM will stop trying to download new Report Writer database views after IIS is restarted on the ISSM server. The default value is 10000, or 10 seconds.
Report Type Local File Path	The directory on the local machine where ISSM stores the downloaded XML file used to manage the Report Writer database views and reports. The value shouldn't be changed from its default setting without consulting ISSM Support. Note that back slashes (\) are used instead of forward (/) slashes. The default value for this field is C:\fsaATLAS\RptXMLFile\
Report Type Update Interval (minutes)	The interval (in minutes) that determines how often ISSM will download new Report Writer database views from the ISSM web site. ISSM will also download new Report Writer database views every time IIS is restarted. The default value is 1440 or 24 hours.

## SEVIS Configuration

The table below lists the settings for SEVIS Configuration.

SEVIS Configuration Fields	Description
# of SEVIS Events in a Batch Limit	Determines the maximum number of events that can be placed in a SEVIS batch. When the maximum number of events has been reached, ISSM creates an additional batch and writes events to it with no interruption. The SEVIS regulations allow up to 250 events per batch, but testing has shown that the SEVIS system can only reliably handle 50 events. Consequently, ISSM Knowledge Base recommends against changing this value. If upgrading from a previous version, there is no need to change the value in this field.
Enable Blank Tags for SEVIS	<p>Tells the application whether or not to send blank tags for SEVIS 5.x events (e.g. &lt;FirstName&gt;&lt;/FirstName&gt; vs &lt;FirstName&gt;Laura&lt;/FirstName&gt;).</p> <p>Unchecked = <i>No</i> = Do not send blank tags (default) Checked = <i>Yes</i> = Send blank tags</p>
Enable Privacy Field Suppression (PFS) Mode	<p>PFS Mode is an alternate operating mode that will only report SEVIS-required information to the US Citizenship and Immigration Services. By default, PFS Mode is enabled. When PFS Mode has been disabled, ISSM will report any available information to the BCIS that is contained in SEVIS-optional fields. If unsure of how this box should be set, disable PFS Mode by leaving it unchecked. If upgrading from a previous version, do not modify this value, since the International Office probably prefers that PFS-sensitive information be handled in a specific manner.</p>
Enable SEVIS Active/Initial Events	<p>Determines if both active and initial records are uploaded simultaneously to SEVIS for the same student. This field is important for any students that have a Change Educational Level event. Refer to Chapter 15, “SEVIS Batching” in the <i>ISSM Advisor Guide</i> for information about this event.</p> <p>By default, this option is not checked. You must check this option in order for the Change Educational Level event to be available in the SEVIS Wizard.</p>

SEVIS Configuration Fields	Description
Enable SEVIS Transfer	<p>Determines whether the ISSM application can upload/download SEVIS batches (Checked = <i>Yes</i>; Unchecked = <i>No</i>). If unsure of how to set this value, check the box. If upgrading from a previous version, there is no need to change the value in this field.</p>
Generate SEVIS Event XML file?	<p>Determines whether the SEVENT XML files are written to the SEVIS Files Upload Directory (Checked = <i>Yes</i>) or stored in memory (Unchecked = <i>No</i>).</p> <p>Outputting the files to disk: When writing XML files to disk, the application does not run as quickly, but troubleshooting is simpler. ISSM Knowledge Base recommends writing XML to disk until advising staff is comfortable with the SEVIS batching process.</p> <p>Using memory to create the output: When events are written to memory, the application runs faster and conserves disk space on the server by not generating SEVENT files. The drawback to this is that troubleshooting incomplete events becomes more difficult.</p> <p>If unsure of how to set this value, check the box.</p>
SEVIS Batch-Exchange Visitor Schema URL	<p>The location of the XML Schema ISSM uses to validate the data in EV SEVIS events. By default, it is set to <a href="http://www.ice.gov/xmlschema/sevisbatch/Create-UpdateExchangeVisitor.xsd">http://www.ice.gov/xmlschema/sevisbatch/Create-UpdateExchangeVisitor.xsd</a></p> <p>Do not alter this field's contents without consulting ISSM Customer Support. If upgrading from a previous version, there is no need to change the value in this field.</p>
SEVIS Batch-Student Schema URL	<p>The location of the XML Schema ISSM uses to validate the data in SEVIS events. By default, it is set to <a href="http://www.ice.gov/xmlschema/sevisbatch/Create-UpdateStudent.xsd">http://www.ice.gov/xmlschema/sevisbatch/Create-UpdateStudent.xsd</a></p> <p>Do not alter this field's contents without consulting ISSM Customer Support. If upgrading from a previous version, there is no need to change the value in this field.</p>

SEVIS Configuration Fields	Description
SEVIS Batch Download URL	<p>SEVIS batches are downloaded from this URL. By default, the value is set to the SEVIS test batch URL, SEVIS Download URL = <a href="https://egov.ice.gov/sbtsevisbatch/action/batchDownload">https://egov.ice.gov/sbtsevisbatch/action/batchDownload</a></p> <p>Contact the SEVIS Help Desk at 800-892-4829 for the production download URL. If upgrading from a previous version, there is no need to change the value in this field.</p>
SEVIS Batch Schema Version	<p>The value represents the active SEVIS Batch Schema Version for the ISSM application. The default value is set to 5 and this value should not be changed.</p>
SEVIS Batch Upload URL	<p>SEVIS batches are uploaded to this URL. By default, the value is set to the SEVIS test batch URL, <a href="https://egov.ice.gov/sbtsevisbatch/action/batchUpload">https://egov.ice.gov/sbtsevisbatch/action/batchUpload</a>.</p> <p>Contact the SEVIS Help Desk at 800-892-4829 for the production upload URL. If upgrading from a previous version, there is no need to change the value in this field.</p>
SEVIS Debug Level	<p>Determines whether the SEVISTransferService logging in the system event log is terse or verbose (<i>0</i> = No logging, <i>1</i> = terse, <i>2</i> = verbose). ISSM recommends against changing this value. If upgrading from a previous version, there is no need to change the value in this field.</p>
SEVIS E-mail - Address Type	<p>Determines the E-mail Address Types that allow the user to identify the e-mail address to be sent to SEVIS.</p> <p><b>Note:</b> If the value in the SEVIS E-mail - Address Type field is changed to another value, for all the pending Create Student or Personal Update Info events, then users must navigate to the student E-Mail Address record and click Save. Then, the processing of Pending records will include the proper e-mail value (as determined by the new SEVIS Configuration Setting value).</p>
SEVIS Transfer Loopback Port	<p>Do not alter this value from its default value of <i>14567</i>.</p>
SEVIS Transfer Page Timeout (seconds)	<p>Determines the timeout limit (in seconds) for connections to the SEVIS servers. Do not change this value unless told to do so by ISSM Customer Support. If upgrading from a previous version, there is no need to change the value in this field.</p>

## SMTP Server Configuration

The table below lists the settings for SMTP Server Configuration:

SMTP Server Configuration Fields	Value
Enable Secure SMTP?	Check box that indicates whether or not Secure SMTP should or should not be enabled.
Secure SMTP-Password	If the Secure SMTP check box is selected, the password identified in this field will be used in conjunction with the user name to establish a connection to the secure SMTP server.
Secure SMTP- User Name	If the Secure SMTP check box is selected, the user name identified in this field will be used in conjunction with the password to establish a connection to the secure SMTP server.
SMTP Sever Port	Port used to connect to the SMTP server.
SMTP Server Address	Setting that stores client SMTP server host name or IP address for purposes of sending e-mail communications from ISSM.

## Portal Configuration options

### Configuring Registration Requirements

Registration requirements are the set of requirements that students will need to meet before they can register for classes. For example, a student may need to submit a list of financial documents to the registrar's office. Use the **Configure Registration Requirements** option of the Enterprise Manager to maintain the list of registration requirements that will be displayed to students. Students can upload supporting documents and submit them for approval to complete each requirement.

When you click **Configure Registration Requirements**, the list of existing requirements is displayed. Those requirements that are visible on the Student Portal are indicated by the **Active** check box.

## Adding a Requirement

Complete the following steps to add a requirement.

1. In the *Enterprise Manager*, click **Configure Registration Requirements** under the *Portal Configuration* options.  
The *Registration Requirements Manager* page is displayed with the list of existing requirements.
2. Click **Add New**.
3. Enter data in the required fields on the **Add Requirement** page. The fields are listed in the following table.

Field	Description
Requirement Name	The title of the requirement. The requirement will be displayed on the list with this name.
Profile Type	The student profile or student visa type the requirements apply to.
Requirement Type	<p>The kind of requirement this is. There are three requirement types: <i>Data</i>, <i>Document</i>, or <i>Other</i>.</p> <p>The <i>Data</i> requirement type can be included to notify students that they need to update some information related to their record. For example, students may need to update their local contact information.</p> <p>The <i>Document</i> requirement type can be included for students to upload specific documents.</p> <p>The <i>Other</i> requirement type can be included for any other requirement that is not covered by the data or document requirement types.</p>
Document Type	<p>Select the check boxes for those document types to be displayed on the portal.</p> <p><b>Note:</b> This field will be displayed only if the <i>Document</i> requirement type is selected.</p> <p>You can manage the list of document types using the <i>Maintain Select Box Values&gt;Document Type</i> option of the <i>Enterprise Manager</i>.</p>

Field	Description
Active	Select this check box if you want the requirement to be displayed on the portal. Leave this box unchecked if you want to only create the requirement now and display it at a later date.
Submit for Approval Recipient E-mail Address	<p>The e-mail ID to which requirements will be sent for approval. For example, when a student uploads a document and sends it for approval, the document will be sent to the e-mail address specified in this field.</p> <p>If this field is left blank, the system will send the notification to the e-mail address entered in the <b>Submit for Approval Recipient E-mail Address</b> field in <i>Configure Application Settings</i> under the <b>Enterprise Manager</b>.</p>
Description	<p>A longer description of the requirement. This description will be displayed when a portal user hovers over the requirement name in the portal.</p> <p>Type in the description in the space provided. Standard formatting options are available in the text box. You can also switch to a HTML view and format the description using standard HTML tags.</p>

- Once you have completed all the fields, click **Save**.


## Editing a Requirement

Click on the requirement name in the list of requirements on the *Registration Requirements Manager* page to edit the requirement fields.

### Note

If there are student records linked to a requirement, for example, if a student has uploaded a document for a particular requirement, then editing that requirement will have limitations. ■

## Deleting a Requirement

Click the  icon for the requirement you want to remove in the list of requirements on the *Registration Requirements Manager* page to delete the requirement.

### Note

If there are student records linked to a requirement, for example, if a student has uploaded a document for a particular requirement, then you will not be able to delete that requirement. ■

# Configuring the Certificate of Understanding

The Certificate of Understanding details the terms and conditions that apply when using the Student Portal. Students who log in to the portal for the first time will see the certificate of understanding. They must read and indicate that they accept the terms outlined in the text. Complete the following steps to add a certificate of understanding for the portal.

1. In the *Enterprise Manager*, click **Configure Certificate of Understanding** under the *Portal Configuration* options.
2. Enter data in the fields listed in the following table.

Field	Description
Title of Certificate	The title of the certificate. This title is used only to save the certificate text, it will not be displayed on the portal.
Profile Type	The student profile or student visa type to which the terms of this certificate apply to.
Signature Required	Indicates if portal users will need to sign this certificate of understanding by clicking a button.
Active	Select this check box if you want the certificate to be displayed on the portal. Leave this box unchecked if you want to only create the certificate now and display it at a later date.
Text of Certificate	The terms and text of the certificate of understanding that portal users will read.  Type in the certificate text in the space provided. Standard formatting options are available in the text box. You can also switch to a HTML view and format the description using standard HTML tags.

3. Once you have completed all the fields, click **Save**.

## Managing Portal Fields

You can change the fields that are displayed on the portal using the **Manage Portal Fields** option under the *Portal Configuration* options of the *Enterprise Manager*. You can hide fields, edit field names or make them read-only, as required.

When you click **Manage Portal Fields**, the list of existing student portal fields is displayed in a table. You can view specific fields by selecting the criteria from the **Filter by category** drop-down list. To sort the fields in the list, click on one of the column headings in the table.

To edit a field, click the **Edit** link alongside a field in the table. You can change the name under which the field is shown on the portal in the **Display Name**. To hide the field on the portal, make sure that the **Visible** check box is unchecked or not selected. If you select the **Read Only** check box, portal users will not be able to edit the field on the portal. To make a field mandatory, select the **Data Required** check box.

 **Note**

The **Read Only** and **Data-Required** check-boxes are mutually exclusive. ■

## Configuring Portal Events

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You can notify portal users of upcoming events at your institute through the portal.

When you click **Configure Portal Events**, the list of existing events is displayed. Those events that are visible on the Student Portal are indicated by the **Active** check box.

You can search for specific events, for events of a particular category, or for events created within a date range by using the search options on the top of the page.

### Adding an event

Complete the following steps to add an event.

1. In the *Enterprise Manager*, click **Configure Portal Events** under the *Portal Configuration* options.  
The *Portal Events Manager* page is displayed with the list of existing events.
2. Click **Add New**.
3. Enter data in the required fields on the **Add Event** page. The fields are listed in the following table.

Field	Description
Event Name	The title of the event. The event will be displayed on the portal with this name.
Event Organizer Name	The name of the person who is conducting or organizing the event.
Event Date	The date for which the event is scheduled. Click the calendar icon to select the date.
Event Location	Where the event will be held.  <b>Note:</b> The locations in the drop-down list can be maintained using the <i>Maintain Select Box Values&gt;Event Location</i> option of the <i>Enterprise Manager</i> .
Event Start Time	The time when the event is scheduled to begin. Click the clock icon to select the time.
Event End Time	The time when the event is scheduled to end. Click the clock icon to select the time.
Sign Up Deadline	The date by which portal users must sign up for the event. Click the calendar icon to select this date.
Description	The description of the event. Type in the description in the space provided.
Event Organizer E-mail	The e-mail address of the event organizer.
Total Seats	The total capacity for the event; the number of participants who can sign up for the event.
Available Seats	This is a read-only field. It will be blank for a new event and for an existing event, it will display the number of seats left, based on the number of people who have already signed up for the event using the portal.
Active	Select this check box if you want the event to be displayed on the portal. Leave this box unchecked if you want to only create the event now and display it at a later date.


- Once you have completed all the fields, click **Save**.

## Editing an event

Click on the event name in the list of portal events on the *Portal Events Manager* page to edit the event fields.

If there are students who have already signed up for this event, the list will be displayed below the event fields. To confirm that the student has attended the event, check the **Has Attended** box alongside the student's name.

## Deleting an event

Click the  icon for the event you want to remove in the list of events on the *Portal Events Manager* page to delete the event.

## Managing Portal Accounts

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The links under the **Manage Portal Accounts** section of the Enterprise Manager allow you to create, activate, or deactivate portal accounts for students in batches. Since the batch account creation process is run as soon as you initiate it, it is recommended that you create accounts in batches during non-peak network usage hours. It is also recommended that the batch size be limited to a maximum of 500 records at a time, when creating multiple accounts. You can also review the status of batch account processes that you initiated.

### Note

The SMTP e-mail service must be configured in order for e-mail communications with students to work and for batch account creation to be possible. The **SMTP Server Configuration** settings are under the **Enterprise Manager>ISSM Configuration>Configure Application Settings** options. ■

## Creating Portal Accounts

You can create Student Portal accounts for multiple student records at a time.

Complete the following steps to create accounts.

1. In the *Enterprise Manager*, click **Manage Portal Accounts** under the *Portal Configuration* options.  
The *Manage Portal Accounts* page is displayed.
2. Click **Create Portal Accounts**.  
A search page is displayed where you can search for student records that do not have portal accounts.

As the student portal is accessible only to student records with a *F-I Profile Type*, that profile type is preselected in the search criteria.

3. To see all the records that do not have a portal account, click **Search**.  
To narrow down the number of records, or to search for a specific student record, specify the search criteria in the **Personal Information** and **Profile Information** fields and then click **Search**.
4. Select the record or records for which you want to create student portal accounts by clicking on the **Select** check box alongside that record in the search results list.
5. At the bottom of the search results page, select one of the e-mail address types for the record in the **Create active accounts using E-mail Address Type** drop down list.

 **Note**

Since this e-mail address will be used to log in to the portal account, ensure that there is a valid e-mail address for that e-mail address type for the student record. This e-mail address type must also correspond to the value in the **Default E-mail Address Type for Portal Account Creation** setting under the *Enterprise Manager>ISSM Configuration>Configure Application Settings* options.

Ensure that the **Campus ID**, **Date of Birth**, and **Country of Citizenship** fields under the **Bio** tab for the student record are filled in. The student will not be able to log in to the portal without these fields being completed. ■

6. Click **Create accounts for selected records**, to create the Student Portal accounts.
7. To create accounts for all the records in the search results list, click **Create accounts for all records**.

## Activating or Deactivating Portal Accounts

You can activate or deactivate Student Portal accounts for multiple student records at a time.

Complete the following steps to manage account activation.

1. In the *Enterprise Manager*, click **Manage Portal Accounts** under the *Portal Configuration* options.  
The *Manage Portal Accounts* page is displayed.
2. Click **Activate/Deactivate Portal Accounts**.  
A search page is displayed where you can search for student records.  
As the student portal is accessible only to student records with a *F-I Profile Type*, that profile type is preselected in the search criteria.

3. If you want to activate portal accounts, select **Inactive** in the **Account** status drop down list to search for inactive accounts that need to be activated.

If you are looking to deactivate existing portal accounts, select **Active** in the **Account** status drop down list to search for active accounts that need to be deactivated.

4. To narrow down the number of records, or to search for a specific student record, specify the search criteria in the **Personal Information** and **Profile Information** fields and then click **Search**.
5. Select the records you want to process by clicking on the **Select** check box alongside that record in the search results list.
6. At the bottom of the search results page, click **Activate accounts for selected records** or **Deactivate accounts for selected records**, to process the records.

## Reviewing Portal Account Batches

The review section lists all the batch processes that were initiated through the *Enterprise Manager* for portal accounts. For example, if you initiated a batch process to activate 50 student portal records and need to check if all records were created successfully, you can search for all 'activate account' processes to verify that all 50 accounts were activated.

You can review the details of each individual batch process. The batch process details show the number of student records that were processed successfully and the overall status of the batch process.

1. In the *Enterprise Manager*, click **Manage Portal Accounts** under the *Portal Configuration* options.  
The *Manage Portal Accounts* page is displayed.
2. Click **Review Portal Account Batches**.  
The *Batch Process Result History Page* is displayed with the list of all portal account batch processes that were initiated through the *Enterprise Manager*.
3. You can search for specific batch processes by selecting the type of process from the **Batch Process** drop down list.  
For example, to see all the batch processes that were run to create accounts, select **Create Portal Account** from the **Batch Process** drop down list.
4. You can narrow the search results further by selecting the status of the process from the **Batch Status** drop down list.  
For example, if you know that a batch process to create multiple accounts did not create accounts for some of the records, select **Partial Success** from the **Batch Status** list.

5. You can sort the search results by clicking on any of the column headers in the table of search results.  
The search results show the date on which the batch process was initiated, the name of the user who ran the process, the total number of records for which the batch process was run, the number of records for which the process ran successfully and finally, the overall status of the entire process.
6. To see the details of a batch process at the individual record level, click on the **Batch Creation Date** for that process in the search results list.  
The list of records involved in that process is displayed along with the details of whether or not that record was processed successfully.
7. You can narrow this list further by making a selection from the **Outcome** drop down list.  
For example, to identify the records for which the batch process did not run successfully, select **Failed** from the **Outcome** drop down list.

## Looking ahead

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After reading this chapter, users should be familiar with ISSM administration procedures, and should be able to use them in conjunction with the Record Navigator, the Task and Appointment Manager, and the Report Writer to set up a campus-wide international student case management application.

 **Note**

Refer to the *ISSM Technical Guide* for Campus DataLink instructions. ■

# 8 RTI Access

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This chapter includes information on RTI Access overview, its features, the supported events, and transferring in the students.

- [“Introduction” on page 8-1](#)
- [“RTI Access workflow” on page 8-1](#)
- [“Supported events in RTI Access” on page 8-3](#)
- [“Verifying student or exchange visitor records in ISSM” on page 8-3](#)
- [“General actions in RTI Access” on page 8-6](#)
- [“Transfer” on page 8-7](#)
- [“Updating personal information” on page 8-8](#)

## Introduction

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RTI Access allows an advisor to access the SEVIS RTI application, track and record certain tasks performed within the application back to ISSM.

SEVIS RTI can be used to create and update international student and exchange visitor records and receive the associated documentation in “real-time”. Users can also use SEVIS RTI to generate events that are not supported using batch. A secured web-based application is used to update the individual records in SEVIS database. Once the information is completed, SEVIS validates this information and provides the output in PDF format (I-20 or DS-2019 documents). Various reports are also provided by SEVIS RTI.

The passwords and user names cannot be shared as the data entry is limited to the Designated School Officials (DSOs) or Alternate Responsible Officers (AROs) by the government regulations. Only the authorized users can then use RTI to enter and update individual student and exchange visitor data using an assigned SEVIS user ID and password.

## RTI Access workflow

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The RTI Access feature allows an advisor to access the SEVIS RTI application from ISSM. When the advisor clicks RTI Access link in ISSM, the SEVIS RTI browser opens in a new window. Once the advisor is logged in, the advisor can search for student or

exchange visitor records. Once the student or exchange visitor record is selected, the application will search the ISSM database for existing records. The system first searches the records based on SEVIS Id, and then searches for a match based on certain key fields. The key fields for the record search are First Name, Last Name, Middle Name, Country of Birth, Country of Citizenship, Date of Birth, and Gender. If there is an exact match of the student or exchange visitor information in ISSM, a green circular indicator is displayed in the Record Search Indicator section on the top of the screen along with the SEVIS ID, First Name and Last Name of the student or exchange visitor. If partial match is found then the Record Search Indicator will display a yellow indicator and if no records are found then it will display a red indicator.

Upon selecting a particular event on the left navigation pane, the respective page opens and the advisor can update the student information by entering the information manually, or populating the fields with the information from ISSM by selecting the Populate from ISSM button at the top. The user can then submit the information and select the Print I-20 button to view the PDF. The events are tracked in ISSM in the Section 3: History/Archived Event(s) in the SEVIS tab, and the data is stored in the ISSM database.

 **Note**

Refer to [“Verifying student or exchange visitor records in ISSM”](#) for additional information on when the data is not saved for certain scenarios. ■

## Supported events in RTI Access

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The currently supported events in RTI Access for this release are:

- Transfer-In: See [“Transfer”](#)
- Update Personal Information: See [“Updating personal information”](#)

## Verifying student or exchange visitor records in ISSM

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The existence of the student or exchange visitor information in ISSM can be verified by the SEVIS ID and certain key fields in SEVIS RTI.

Use the following instructions to verify student or exchange visitor information in ISSM.

1. Login to ISSM with a valid user name and password. See [“Logging in to ISSM”](#).
2. Select the **RTI Access** link in ISSM.

The SEVIS RTI window opens in a new browser.

### Note

Wait as the ISSM - RTI Access page downloads the application information. Do not close this window as this will stop the download. The user will see this download page only for the first time, and when there are subsequent updates to the RTI Access functionality.

If the RTI Access browser is already open, a message box is displayed with the message ‘The RTI Access feature is already opened, please use the existing browser window.’

3. Enter a valid user name and password on the SEVIS RTI login window, and click **Login**.
4. Click **Student Lists/EV Lists**, or Search to find a student or exchange visitor to work with.
5. Click the student or exchange visitor last name in the **Family Name** column to verify the information in ISSM. See [“RTI Access workflow”](#) for more information on the record search process.

Based on the record search result, the user will be able to access 2 different views.

- Compare View - For more information on Compare View, see [“Compare view”](#).
- Grid View - For more information on Grid View, see [“Grid view”](#).

The table below lists the view type and the indicator color for various scenarios. Double-clicking on the indicator opens the Compare View or the Grid View.

Scenario #	Scenarios	Indicator Color	View Type
1	SEVIS ID matches single record and Exact Key Fields match.	Green	Compare View
2	SEVIS ID matches single record, and No exact Key Fields match.	Yellow	Compare View
3	SEVIS ID matches multiple records, and Key Fields match multiple records.	Red	Grid View
4	SEVIS ID matches multiple records, and No exact Key Fields match.	Red	Grid View
5	No SEVIS ID matches, and Key Fields match single record.	Yellow	Compare View
6	No SEVIS ID matches, and Key Fields match multiple records.	Red	Grid View
7	No SEVIS ID matches, and No exact Key Fields match. (No Records Found)	Red	No View

 **Note**

The views are not displayed when no records are found. ■

## Compare view

The Compare view is displayed when a single record is found during the record search process. The view displays the data comparison between the RTI and ISSM information for the Key Fields like SEVIS ID, Family Name, First Name, Country of Birth, Date of Birth, Country of Citizenship and Gender, as well as some additional fields that are important. The tables below list the fields that are displayed on the compare view:

### Sample F/M Compare View

	SEVIS RTI	ISSM
Identification Information		
SEVIS ID	N00000097827	N00000097827
Campus ID	N/A	D9828348
Personal Information		
Family Name	BROWN	BROWN
First Name	Allison	Allison
Country of Birth	AUSTRALIA	AUSTRALIA
Date of Birth	11/11/1978	11/11/1978
Country of Citizenship	AUSTRALIA	AUSTRALIA
Gender	FEMALE	FEMALE
Database Status	N/A	Active
Program Information		
Visa Type	F-1	F-1
Student Status	Initial	SEVIS - Pending
Program Start Date	9/1/2010	9/1/2010
Program End Date	8/31/2014	8/31/2014
Major	52.0301 - Accounting	52.0301 - Accounting
Education Level	Bachelor	Bachelor

### Sample J Compare View

	SEVIS RTI	ISSM
Identification Information		
SEVIS ID	N00000097827	N00000097827
Campus ID	N/A	D9828348
Personal Information		
Family Name	BROWN	BROWN
First Name	Allison	Allison
Country of Birth	AUSTRALIA	AUSTRALIA
Date of Birth	11/11/1978	11/11/1978
Country of Citizenship	AUSTRALIA	AUSTRALIA
Gender	FEMALE	FEMALE
Database Status	N/A	Active
Program Information		
Visa Type	J-1	J-1

	SEVIS RTI	ISSM
EV Status	Initial	SEVIS - Pending
Program Begin Date	9/1/2010	9/1/2010
Program End Date	8/31/2014	8/31/2014
Category	STUDENT MASTERS	Student - Masters
Subject Field	Agribusiness/Agricultural Business Operations	Agribusiness/Agricultural Business Operations
Position	214 - UNIVERSITY GRADUATE STUDENTS	214 - University Grad

## Grid view

The Grid view is displayed when multiple ISSM records are found during the record search process. All the records will be listed in the grid style view.

### Sample Grid View

SEVIS ID	Campus ID	Family Name	First Name	Country of Birth	Date of Birth	Country of Citizenship	Gender
----------	-----------	-------------	------------	------------------	---------------	------------------------	--------

## General actions in RTI Access

This section discusses the different actions that can be performed using the RTI Access functionality. During the SEVIS event creation in RTI Access, the user id is passed from ISSM to RTI Access. The user id is recorded in the event as the user who created the event.

### Populate from ISSM

The **Populate from ISSM** button gets enabled when there is an exact or partial match during the record verification process. When the **Populate from ISSM** button is clicked, the RTI Access automatically populates the fields on the event page with the data that exists in the ISSM database.

### Submit

When the advisor populates all the fields on the event page, by entering the information into the fields directly, or by clicking on the Populate from ISSM button, and clicks on

**Update**, the application updates or submits the information and saves it to the ISSM database. On successful update the data is saved in the ISSM, and a “Update Successful” message is displayed. The user will momentarily see the progress bar and the Populate from ISSM button will disappear.

## Print I-20

When the information for the student or exchange visitor is successfully updated on the page, the “Update Successful” message is displayed. The user can print the I-20 form by clicking **Print I-20** which will display the I-20 PDF in the RTI Access window, or click **Return to Record** to view the record. This generated PDF is downloaded and attached to the SEVIS event and can be viewed by the user in **Section 3: History/Archived Event(s)** in ISSM. The user is also presented with a pop-up box that indicates when the PDF has been saved to the database. The PDF will only be saved when the user clicks on the **Print I-20** button.

## Transfer

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This section discusses the SEVIS RTI - Transfer In procedure.

### SEVIS RTI - Transfer in

The student record to be Transferred In must exist in the ISSM database with the SEVIS ID value for the record search process. This is the case because the student will need to apply to the target school, which means that the record will exist in the Admissions system of the target school. Depending upon current business process, the prospective record will be imported into ISSM if SIS integration is in place. If there is no integration in place, the record will need to be entered in to ISSM manually. Users can create a “skeleton” record in ISSM by entering in the SEVIS ID and some of the key fields like Name, Date of Birth, Gender, Country of Citizenship, Country of Birth, such that an exact or partial match is found.

Use the following instructions to Transfer In a student to a school.

1. Click **Students Transferring In** student list in RTI, or find the student transferring in.
2. Click the last name under the **Family Name** field. The Student Information page is displayed.

#### **Note**

The fields in the **Personal Information** section are back filled from the previous record in the transfer-out school. The fields in the **Financial Information** section are blank and must be filled for the new program in the destination school. ■

3. Click **Create I-20** in the left navigation pane.

The Create I-20 for Transfer window is displayed, and the **Populate from ISSM** button is enabled.

4. Click **Populate from ISSM** to fill the form fields with ISSM data of the particular student.

 **Note**

The advisor is also able to modify the data in the fields within the form, and save in ISSM. Advisors do not have to use the Populate from ISSM button. ■

5. Click **Next** on the page 2 of Create I-20 for Transfer window to fill the other fields of the form. Click **Populate from ISSM** again to fill the form fields with the ISSM data of the particular student.

6. Click **Submit** to save the changes.

The Submit Successful message is displayed.

Submitting the form saves the modifications in ISSM, and SEVIS “Transfer-In” and “Create Student” events transaction history are created in **Section 3: Historical/Archived Event(s)** of the **SEVIS** tab and the status of the event will be set to *Archived* status.

 **Note**

If an existing Create Student event exists in the Pending Event(s) section, the event will be updated and archived immediately.

If no Create Student event exists in Pending Event(s) section, the event will be created and archived immediately. ■

7. Click **Print I-20**. For more information on printing I-20 forms, see [“Print I-20”](#).

The advisor is redirected to the Student Information window.

## Updating personal information

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When the student record in SEVIS matches with the student record in ISSM, the user can update the personal information for the student.

Use the following instructions to update the personal information for the student.

1. On the left pane, click **Personal Information**. The Update Personal Information window is displayed.
2. Select **Populate from ISSM**. See [“Populate from ISSM”](#) for more information.

A progress bar is displayed in RTI Access when a request is in process. When the progress bar is displayed, the mouse pointer turns into an hour glass to prevent the user from performing any action on the window.

3. Edit the required fields.
4. Select **Update Information** to update the modified fields in SEVIS.
5. On clicking **Update Information** within the event page, the application automatically updates the record in ISSM with the changes. Active SEVIS events are not generated when the record is updated. The *Personal Info Update* event is created and archived in ISSM, and a SEVIS event history appears in **Section 3: History/Archived Event(s)** of the **SEVIS** tab.

 **Note**

The *Personal Info Update* event does not appear in the SEVIS Manager - Inbox nor In Process. Clicking on the event name opens the Detail Event page and the information on this page cannot be edited. ■

# A ISSM Contact Information

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This chapter includes information on ISSM customer service contact information.

## ISSM knowledge base contact information

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Ellucian

4375 Fair Lakes Court

Fairfax, Virginia 22033

United States of America

Customer Support Web site	<a href="http://www.ellucian.com/Solutions/Ellucian-Client-Support/">http://www.ellucian.com/Solutions/Ellucian-Client-Support/</a>
Customer Support toll-free number	1-800-522-4827
ISSM customer support e-mail address	<a href="mailto:actionline@ellucian.com">actionline@ellucian.com</a>
Company Web site	<a href="http://www.ellucian.com">http://www.ellucian.com</a>

 **Note**

The Ellucian Support Center website contains many resources for users including software and documentation updates, a list of frequently asked questions, and a searchable technical support knowledge base. ■