



"Customizing Connect for Beginners: Graduate School Edition" **Tips & Tricks**

1. Ask the following questions before "The Customization"
 - a. Who Will Be Using Connect?
 - i. It's not just admissions!
 - ii. Financial aid, deans, program advisors, graduate assistants...
 - b. What information is important to whom and how should it be presented?
 - i. Create custom views for various functions
 - ii. "If I don't need it, don't let me see it."
 - iii. Your constituents don't have the same data needs!
 - c. What types of data attributes are needed?
 - i. Use everything available to you: dates, freeform text, check-boxes, menus, radio lists
 - ii. Remember that accuracy in data ensures accuracy on communications – Use attributes that are clear, concise, and appropriate for the data you need.
 - d. What is necessary to satisfy communications needs?
 - i. Identify which types of data you want on your reports.
 - ii. Know how your data will "drive" communications
 1. Dates drive the "when"

2. Free-form text can identify student-specific information (Contact info, waivers, program information, etc).
3. Menus allow for a customizable option that is unique to the student, but also ensure accuracy in the number and types of options.

2. Create the views you need

a. Separate roles and needs

- i. Admissions Processing
- ii. Financial Aid
- iii. Inquiry View for *basic* data entry
- iv. "Follow-up" view
- v. Any others...

b. Be aware of the number of views

- i. Too many is cumbersome
- ii. Too little can miss some of the most pertinent data management needs

3. Streamline your work flow

a. Organize attributes in the order applications are processed

- i. Your support staff will thank you!
- ii. If an application decision requires a status update, a term of entry check, a conditional status update, an accepted date, test scores, etc... Organize those attributes, in that order, from top to bottom in one column on your view screen.

b. Keep "like" attributes together

- i. Group attributes to prevent "bouncing around" the view when entering data

- ii. **Suggested groups:**
 - 1. **Biographical information**
 - 2. **Previous school information**
 - 3. **Admissions data (Status, term, decision dates, etc.)**
 - 4. **Test Scores**
 - 5. **International status information (Visa status, I-20 information, etc.)**

4. Don't be afraid to call it a "Work in Progress"

- a. **Customization in Connect is the key – Don't just "Set it and forget it." Make the data and the program work for you.**
- b. **Consult your key players. Find out the best and worst of what you're doing with Connect and adapt the views to accommodate the best for your users.**
- c. **Train, train, train. Don't shy away from recurrent training. Use a frequent roundtable meeting format to discuss issues and needs for Connect, and provide insights on new updates to your views.**

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