

General Instructions for using Colleague/Benefactor

To search for a person in Colleague, use the **first two letters** of the last name, the **first two letters** of the first name. This is the most general way to search and will help eliminate duplicates in the system. (For example: search on BE,TO for Tom Belnap). Also check for possible similar names (Elizabeth/Beth/Liz, Jim/James, Tom/Thomas).

Use the following function keys as you enter information:

- F7** (field jump) move between fields
- shift F8** (field back) go back up to a previous field. This will take you back up one field at a time.
- F9** (detail) detail into another screen
- shift F9** (cancel) get out of a record and cancel what has been entered

To exit a screen:

- F10** (direct access) saves and leaves you in record and prompts you for a screen
- F11** (finish/end) saves and takes you back a screen
- F12** (update) saves and leaves you in screen and prompts you for next record; *** best for data entry
- Shift F11** (exit) saves and takes you back to menu

To correct mistakes within a field use the **Delete** key. If you need to enter a new code, clear the field first and then enter the new code. The system has internal capitalization rules and will automatically insert the dashes for phone numbers and social security numbers. In order to override the capitalization rules, type an equal sign (=) before typing your entry. This maintains your entry exactly as typed. For example: type =**LaGrande**, with the equal sign, otherwise it would appear as **Lagrande**.

Colleague/Benefactor Data Entry Standards

Lewis & Clark College

All entries are in upper and lower case as indicated.

NAMES

Enter a name as completely as possible to avoid making changes later as the person moves through the system.

Do not enter punctuation.

Several examples are listed below:

James Robert Monroe	LAST:	Monroe
	FIRST:	James
	MIDDLE:	Robert
James Robert Monroe Jr	LAST:	Monroe
Dr James Robert Monroe III	FIRST:	James
	MIDDLE:	Robert
	PREFIX:	Dr
	SUFFIX:	Jr or III
James Robert Monroe-Taylor	LAST:	Monroe-Taylor
	FIRST:	James
	MIDDLE:	Robert
M Jane Smith	LAST:	Smith
	FIRST:	M
	MIDDLE:	Jane
Thomas Don Van der Veer	LAST:	=Van der Veer
	FIRST:	Thomas
	MIDDLE:	Don
Jose de La Cruz	LAST:	=de La Cruz
	FIRST:	Jose
	MIDDLE:	
Patrick John O'Brien	LAST:	=O'Brien
	FIRST:	Patrick
	MIDDLE:	John

ADDRESSES

Guidelines

- 1) Enter the complete address in long form as space allows, but Northwest, Northeast, etc. should **always** be abbreviated. The following example is an acceptable entry:

Northwest = NW

1680 SW Wellington Avenue

Southwest = SW
Northeast = NE
Southeast = SE

Portland OR 97219

i) Exception:

- (1) Never leave off any directional indications like N, S, SW, NE etc. that may be at the end of the line (i.e. Seattle and Salem addresses).

If there is still not enough room, use the following guidelines *in this order* to shorten addresses:

b) Abbreviate North, South, East or West:

North = N
South = S

1550 N Cedar Drive
Portland OR 97219

i) Exceptions:

- (1) Always spell out addresses where the direction is the main street name (i.e. 123 South, or 762 West).

c) Use the following abbreviations **only when necessary**:

Avenue	=	Ave	Loop	=	Lp
Street	=	St	Circle	=	Cir
Highway	=	Hwy	Court	=	Ct
Drive	=	Dr	Parkway	=	Pkwy
Place	=	Pl			

Example: 13328 SW Harrington Ave
Portland OR 97213

Avenue, Street or Drive may be left off if you run out of room. NEVER leave off Place, Court, Circle, Loop

d) Abbreviate the following:

Rural Route	=	RR
Rural Delivery	=	RD
Star Route	=	SR
Highway Contract	=	HC

Example: RR 1 Box 293
HC 5 Box 9824

NUMBERED STREETS

1) Numbers from 1 to 10 should be written out:

First Street
Second Avenue

2) Above 10, the streets should be written numerically:

11417 SE 88th Street
1616 South 92nd Place

3) Post Office Boxes:

- PO Box 367
- 4) Apartments:

Apt 367
#367

CITIES

- 1) Always use full names. Nearly all city names in the US will fit in the space allowed.
 - a) Typically, you will not have to enter the city. when you enter the zip code in the city field, the city and state defaults in.
- 2) APO, FPO. Add these in front of the City.

APO New York NY
FPO San Francisco CA

- 3) AA, AE, AP should be typed in the state field:

APO AE 31129

FOREIGN ADDRESSES

CANADA:

- 1) Enter the province in the STATE/PROVINCE field. The postal code in the ZIP field, and CA in the COUNTRY field.

ADDRESS:	11417 SE 187 th Avenue
CITY:	Victoria
STATE:	BC
ZIP:	V0X 1A3 (typical format NXN NXN, where N = number, X = letter)
COUNTRY:	CA (Canada)

OTHER FOREIGN COUNTRIES:

For other foreign addresses, the most important thing to remember is that the STATE field must be left blank. The CITY field may contain both the name of the city and a province or county if space permits. When the STATE field is left blank, the ZIP field can be used for up to 9 characters, alphabetic or numeric. The COUNTRY field must be filled with the appropriate code. It will print out on labels/letters but will not show on the screen.

ADDRESS:	Guest House Nankai University
CITY:	Beijing
STATE:	
ZIP:	
COUNTRY:	CH (Republic of China)

US POSSESSIONS:

Enter the possession in the STATE field; possessions have US zip codes.

US Possessions:

American Samoa	=	AS
Federated States of Micronesia	=	FM
Guam	=	GU
Marshall Islands	=	MH
Northern Mariana Islands	=	MP
Palau	=	PW
Puerto Rico	=	PR
Virgin Islands	=	VI