

Config E.R.P. – University (U.E.R.P.)

Config University Overview
Config Business Suite



Helping you carrying on!

About Config University ERP (UERP)

While others may claim their ERPs are completely integrated, Config UERP is the only system truly integrated around a secure, single shared Microsoft SQL database. As the only 100-percent Web-native academic ERP solution built from the ground up for higher education, Config UERP is the smartest choice for institutions seeking to maximize their IT investments. With our flagship product Config UERP, colleges and universities — small, medium, large through XXXL— can communicate, collaborate and better manage the entire student lifecycle from prospects to alumni while cutting their annual IT spending by half or more.

Our unique solution uses 100-percent Web technology to connect prospective students, current students, faculty and alumni through portals to manage admissions, registration, student records, financial aid, fundraising management, alumni relations and more. Built with pure Microsoft technologies, Config UERP Enterprise ensures compatibility, ease of use, user familiarity, and efficient use of resources, scalability and complete automation.

Academic ERP Admissions/Recruiting/CRM

Today's college recruiting practices are characterized by highly sophisticated, data-driven marketing strategies. By segmenting markets, recruiters can gain keen insights into how students make college choices, thus targeting prospects most likely to select their institutions.

At the same time, students have become equally selective and demanding consumers who filter their direct mail, e-mail and banner ads while exploring websites and visiting colleges.

Analytical techniques and market research tools allow institutions to target effectively direct mail, off-campus visits or receptions, telemarketing and financial aid awards.

Technology adds new dimensions to recruitment practices used in marketing your institution and counseling students. Today, students routinely apply online as the Internet plays an ever-increasing role in recruiting students while reducing costs for institutions.

As a Web-native solution, Config UERP manages the entire recruitment process from the prospect stage all the way through admissions. Whether recruiters are on the road or in the office, they have instant access to active student information, and by automating administrative tasks, they can spend more time with prospects, turning them into applicants and admitted students.

Your recruiters can automate outreach activities, targeting specific groups for automated mailings, phone calls, visits and more. They can summarize and analyze recruiting efforts through a variety of readily available reports, quickly identifying activities that are most advantageous. With Config UERP, your recruiters will spend more time recruiting and less time performing administrative tasks.



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Recruiters maximize prospecting by using Config UERP to:

- Store prospect information, including source of lead, specific area of interest, region, and more.
- Create comprehensive letter tickler systems with flexible automated mail merge.
- Customize and track activity assignments.
- Consult on-screen, working to-do lists.
- Generate customized prospect lists that can be merged automatically or on demand.
- Handle telemarketing and contact management.
- Evaluate your recruitment activities through numerous evaluation reports.

With competition for the best students at historic highs, enrollment management teams need the powerful prospect-evaluation and marketing tools of . With its advanced relationship-management tools, recruiters can track detailed prospect records, manage tasks and activities, schedule follow-ups, send e-mails, letters and other documents while they maintain a complete history of communications and notes. With Config UERP the admissions office gets:

- Unlimited address tracking
- Configurable test score tracking
- Demographic data and SEVIS data tracking
- Communications management with complete history
- Unlimited notes and evaluation tools
- Education background and history
- User-defined fields

Once a student is admitted, data can be automatically transferred into a student record, completely eliminating any entry duplication. Config UERP contains a vast array of reporting tools to extract information needed to assess recruiting efforts, analyze current student statistics and evaluate retention data. Through the Config UERP admissions component, administrators can:

- Transfer groups of applicants to admitted status with one click.
- Store complete demographic information.
- Track and restore multiple student addresses and unlimited address histories.
- Transfer previous high school and college information.
- Record and assess ACT, SAT, GED, TOEFL and unlimited other scores.
- Calculate student college level and other parameters automatically.
- Specify enrollment into degree program.
- Utilize full document tracking and contact management capabilities.
- Generate numerous preexisting comprehensive reports and unlimited ad hoc reports

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Academic ERP Registration

The registrar's office is the center of campus, with connections to the most critical areas of the student lifecycle, like admissions, financial aid and billing. As the hub for academic data, the Config UERP Registration solution maintains key information about each institution's classes and student's interaction with them, including course offerings, registrations, transfer credit, grades and transcripts. Because Config UERP uses a single secure, shared database, things like address changes and status updates are immediately available system-wide.

With Config UERP, users in other departments don't have to wait for overnight batch processes to do their jobs; the data is real-time so it is always current, always up-to-date. Additionally, Config UERP automates regular recurring activities so that, for example, when a student registration is entered, bills are instantly updated, the LMS knows a new student has access to the course area, and the waitlist is adjusted, saving your institution time and money. With its many built-in features, Config UERP® allows colleges and universities to reclaim countless administrative hours. The Registration solution also enables users to:

- Track multiple degrees, academic programs, and historical status.
- Plan and evaluate Degree Audits.
- Transfer credits from other academic institutions and specify how to handle GPA and accepted credit hours.
- Process and track transcripts effortlessly.
- Create course offerings for unlimited terms including semester, quarter, monthly or non-traditional courses such as distance/correspondence or seminar.
- Offer multiple lecture, labs, and clinical sections with flexible times and facilities.
- Specify beginning and ending dates per course, per term, giving total flexibility in course scheduling.
- Create unlimited campus course offerings with unlimited departments.
- Offer online registration with electronic bill payment.
- Produce probation/dean's lists, directory, mail merge, graphs, etc.
- Utilize unlimited cost centers, scheduling, and cost setup per course per student.
- Assign unlimited course and registration fees.
- Register or pre-register for unlimited terms.
- Check class capacity automatically.
- Warn of course repeats and pre-requisite/co-requisite deficiencies during registration.
- Check student class schedule against possible conflicts.
- Automatically apply student/hold alert.
- Receive grades electronically via the Faculty Portal.
- Generate comprehensive reports, including IPEDS, NSLC, FTE, faculty load, grade analysis and more.

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Academic ERP Financial

Navigating the complex waters of financial has never been easier than with Config UERP® Financial. Its flexibility and automation makes financial-aid processing quick and efficient.

Config UERP provides complete financial-management, academic progress tracking, automated rule-based packaging as well as importing and reporting capabilities. Config UERP processes financial aid from the recruiting stages to enrolment. It monitors academic progress and handles disbursements and refunds efficiently.

This easy-to-use module allows a college or university to download students' Institutional Student Information Report — ISIRs — automatically, apply document tracking items to the student record, apply multiple cost-of-attendance budgets to all students as appropriate, auto-package student awards, handle direct loan processing with direct loans and grants, automatically or manually make adjustments based on data conditions and transfer monies to billing.

Config UERP institutions monitor and report on their financial-aid operations with built-in reporting as well as ad hoc reports, and conform to federal requirements with ease using a host of pre-defined reports like Crystal Reports. Config UERP Financial keeps you ahead of the curve in student lending practices by simplifying the processing of direct loans and federal grants through Config's integration tools.

With Config UERP Financial you can:

- Easily import student ISIR records, and during this process you may also:
- Automatically load document tracking items associated with specific ISIR values.
- Add any student exceptions (no matching SSN) to a Prospect import batch for earlier recruitment.
- Compare subsequent ISIR transactions to easily see updated fields and determine which record is most beneficial.
- Automatically assign cost of attendance budgets.
- Review student needs- analysis prepared by Config UERP immediately upon budget assignment.
- Mass auto-package student awards in priority order based on federal as well as unique institutional rules.
- Automatically generate personalized award letters upon packaging. Have students view and accept financial aid in real-time through the integrated portals for a more-convenient experience.
- Process direct loan and federal grants through Config's with easy-to-use integration tools.
- Easily import and Master Promissory Note, or MPN, Entrance Counselling and previous loan information from National Student Loan Data System — NSLDS.
- Produce financial transcripts, Government reports, NLDS data and academic progress reports.
- Track required financial-aid documents and report on missing documents.
- Use the powerful BYOR — Build Your Own Report — feature and select from multiple formats.
- Easily manage work-study programs.
- Offer the convenience of Electronic Fund Transfer — EFT — to financial-aid recipients.
- Process check receipts.
- Record loan- log information and conduct exit interviews.



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Academic ERP Fiscal Management

As one university president remarked in a Chronicle of Higher Education feature on funding, "There was a time when we got it without asking. Those days are over."

Clearly, it's a new day bringing new challenges for colleges and universities. Never before has the ability to access up-to-date, accurate, real-time financial information been more essential or important.

Config UERP ® Fiscal Management solution provides tight integration with many off-the-shelf accounting systems, offering choice along with sophisticated integrated features to ensure your institution's fiscal management runs smoothly.

Maintaining financial health today requires a sophisticated, easy-to-use system. Config UERP is tightly integrated with Crystal Reports software based on Microsoft SQL, making advanced integrated features available to our clients.

Config UERP is authentic accounting software designed by accountants to comply fully with the laws and provide the most features anywhere. Considered No. 1 in the industry, Config UERP offers a strong set of accounting modules to ensure your institution's fiscal health.

Features include flexible chart of accounts, easy reporting and drill down capabilities to identify problems. Throughout the years, Config UERP has made life easier for business-office personnel and auditors by providing full integration with accounting packages like Config UERP.

See below for a brief description of each module along with the list of features. Other accounting software is also available — we give you the choice.

General Ledger

Config UERP General Ledger serves as the heart of your accounting activities — controlling the flow of account information on the front end and reports construction on the back end.

It builds upon a flexible system of transaction entries. General Ledger is easily tailored to your institutional requirements and allows you to:

- Define your own flexible account structure up to 20 characters long and up to six segments of up to six digits in length. Another 20 characters for a total of 40 characters can be added with an option pack.
- Define up to 54 fiscal periods a year and maintain two open years at a time (You are not forced to close periods or years).
- Create an unlimited number of financial accounts to track current budget and historical balances.
- Establish and track statistical accounts for non-financial data, such as allocation by department of rent/square foot.
- Track unlimited budgets and unlimited years of history.
- Drill down to find originating entries that make up account balances or view an invoice for verification.
- Create a visual audit trail.
- See on-line notes, accounting procedures and account instructions.
- Support different account structures for multiple institutions' batch or individual posting.
- Post dates by transaction date or batch date.
- See online inquiries on account period summary information for current, history and net change balances.
- Create user-definable work environments.
- Perform and create online "to-do" lists.



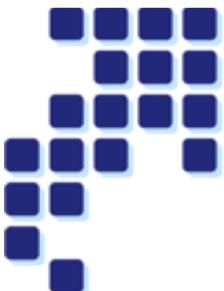
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Receivables Management

Config UERP Student Billing is our billing and accounts receivable solution.

Config UERP provides additional functionality with optional, separate, non-student receivables. For example, some institutions may have a print shop that sells to the public. The ability to control receivables is at the heart of your institution's economic stability with these types of features:

- An unlimited number of addresses for "bill to" and "statement" addresses for each customer.
- Quick entry of new customer records by "class" association.
- Globally change all customers in a class by changing "class" data.
- Online notes for customer and transaction record
- Automatic calculation of average days to pay.
- Ability to designate posting accounts per customer gives with flexibility to post to G/L.
- History options customized per customer: calendar period, fiscal period, transaction and distribution history.
- Group customers in statement cycles.
- Place accounts on "hold."
- Establish individual credit limits.
- At time of cash receipts, quickly match payment to invoice.
- Automatic calculation of sales tax.
- Record, track and charge checks returned for non-sufficient funds.
- Easily void invoices while maintaining audit trail.
- Choose from predefined statements, modify or design your own.
- Automatically calculate discounts.
- Support account aging and finance-charge assessment.



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Payables Management

From creating vouchers to cutting checks and reporting on vendor performance, Config UERP Payables Management module works for your institution.

- Detailed information on vendors, credit summaries and transactions can be accessed quickly and reliably. Consider these specifics. You can:
- Assign each vendor can have an unlimited number of addresses, which can be added or deleted anytime.
- Track vendors, manage vouchers, process payments and analyze vendor performance.
- Quickly enter new vendor records by "class" association.
- Globally change all vendors in a class simply by changing "class" data.
- Enjoy true customization of each vendor record thanks to user-defined fields.
- Attach notes to vendor and transaction records.
- Automatically calculate number of days to pay a particular vendor, giving you valuable information for negotiating terms.
- Ability to designate posting accounts per vendor gives you flexibility to post to G/L as you wish.
- Place holds on vendor accounts and payments.
- View history options that include calendar period, fiscal information, and distribution history.
- Create and track temporary vendors.
- Create one-time and recurring transactions.
- Save time by easily applying credit memos and returns to other documents at time of entry.
- Print checks at the time you enter a voucher for immediate payment.
- Calculate taxes automatically.
- Record manually written checks.
- Customize check runs.
- Void payments automatically while creating correcting entries for posting to G/L.
- Access quick inquiry windows for vendor summary, credit summary, fiscal and calendar periods, transaction information and payable status summary.
- Sort reports by calendar year or fiscal year and vendor totals.
- Print aged trial balances and historical aged trial balances.
- Customize reports by specifying date range on trial balances.
- Analyze current and future cash flow needs.



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Payroll

Fast, accurate and efficient processing of payroll helps your institution operate efficiently and securely.

Config UERP Payroll Module calculates salary, pension and EIC amounts effortlessly, using shared data from other areas of the accounting program when available. With Payroll Module you can:

- Keep financial statements up-to-date by posting payroll transaction information to G/L.
- Have unlimited pay codes, deductions, benefits and local taxes.
- Quickly enter new employee records by "class" association such as job type.
- Enter a change once to modify information for an entire class. If desired, the change can be rolled down to all employees in the class.
- Attach notes to employee and transaction records.
- Set up pay, deduction, benefit and local tax codes for an entire company.
- Record information specific to your business in employee records via user-defined fields.
- Assign individual employees multiple pay records per pay type.
- Have unlimited defined pay codes to allow editing of monthly, quarterly and yearly financial information for reports and W-2 statements.
- Automatically record, track and subtract advance pay from employee's next check.
- Record accountable and non-accountable business expenses to be included on W-2 statements if desired.
- Enjoy complete flexibility when sheltering deductions from taxes so deductions such as 401(k) plans are calculated properly.
- Show accrued vacation and sick time automatically either as flat number of hours each period or as a calculation based on number of hours worked.

Bank Reconciliation

Efficient bank reconciliation saves you time and money. Config UERP Bank Reconciliation provides unsurpassed access to vital information, making your data a powerful tool. You'll be perfectly positioned for rapid growth. Consider the following, which are just a few of the features this module delivers:

Consider the following, which are just a few of the features this module delivers:

- Transaction Sorting - Sort transactions by type or date, which allows you to match your bank statement layout for quick reconciliation.
- Reconcile - When the reconciliation totals match, simply press the reconcile button and the program does the rest for you. All files are updated and posted to the G/L, and your reports will contain the latest information.
- Drill down in greater detail - Get detailed information about deposits, checks and more, all without interrupting your reconciliation process.
- Flexibility to deal with exceptions on the fly - Handle cleared amount adjustments quickly and easily without having to make a separate transaction.
- Seamless integration - Bank-related information flows from module to module, so you have to enter information only once.
- Bank reconciliation inquiries - Get instant answers to bank related questions while viewing reconciled and un-reconciled transactions immediately.
- Reporting - Create a suite of reports that present the information you need in the best format for your business.



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Purchase Orders

From a simple, one-time order to complex, multi-item, multi-site purchases, Config UERP Purchase Order module automates all processes. You tailor purchase and receipt numbers to fit your institution; related information flows from all other parts of the accounting system.

Tracking and "drill down" capabilities make answers to your most important purchasing questions automatic. You can:

- Drop ship orders — Items can be shipped directly to customer by the vendor.
- Change saved purchase orders — Purchase orders can be easily adjusted allowing for preliminary orders.
- Place multi-site orders.
- Track status of purchase orders.
- Automated purchase order generation can create purchase orders in response to quantity shortages.
- Track bill of lading.
- Assign pre-approved purchase levels.

Inventory

Gain full and accurate control over inventory from a public address system in the athletic department to individual stock at the bookstore. Items are easy to enter, value and track. Effective tools for inventory control minimize shortages and overrides. As with all accounting modules, you have powerful report capabilities that print inventory checklists helping you evaluate turnover and stock sizes.

Here are just a few of the several options this module offers:

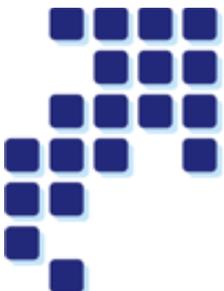
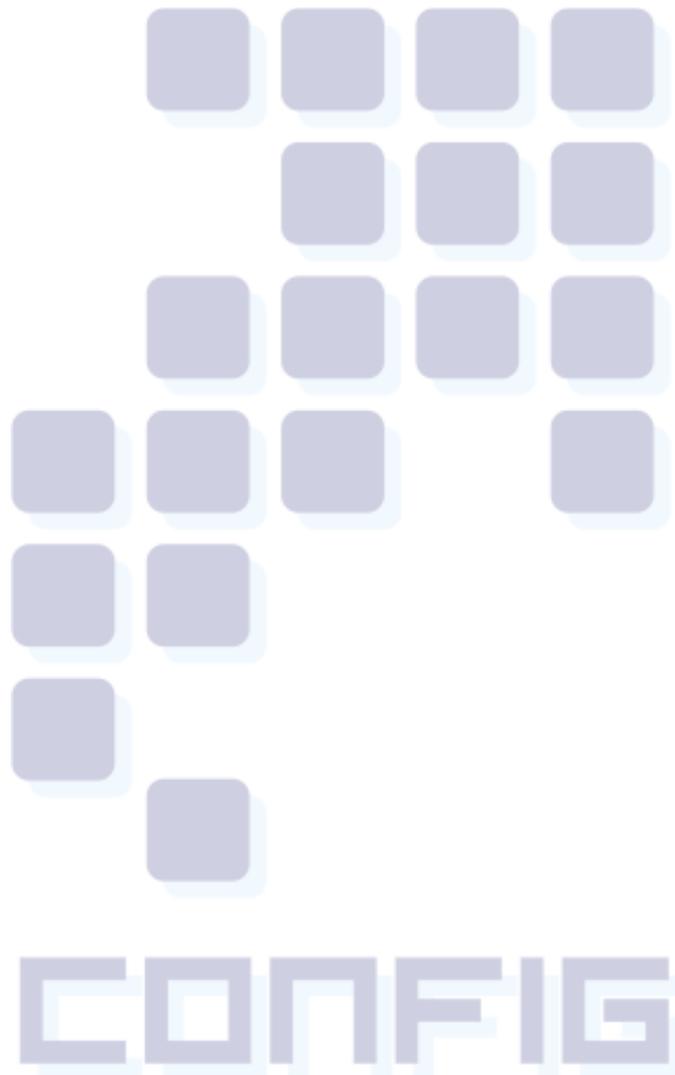
- Item classes used to create template records make entering items fast and easy.
- User-defined categories allow you to track and analyze information unique to you.
- Item numbers are flexible and allow you to keep the tracking system already in place or define a brand new system.
- Serial and lot numbers allow you to keep meticulous control of your inventory and help you improve customer service.
- Item vendors help you track all the pertinent information for each item ordered from every vendor.
- Quantity types allow you to obtain status on items at any time.



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Academic ERP Document Tracking

Embedded within the Config UERP ® modules is a powerful tool for eliminating paper from your campus operations and automating the distribution, storage and retrieval of required documents or groups of documents. Document Tracking has been integrated into the Config UERP ® system to provide an easy way to manage documents without the need for paper-based files. Config UERP Document Tracking capabilities enable easy distribution of image files and standard student forms. With just a click, staff members can attach documents to student records, eliminating wasteful mailings and pushing required documents through the Portals for student completion and return. You can automate the collection of standard information and save paper, printing and mailing expenses with Config UERP built-in document tracking.



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Academic ERP Student Portal

It's a Web world, after all. And for today's generation of students, if you're not online you don't exist.

Students today conduct a large part of their social interaction online using the Web, social media, e-mail or text. They are so attuned to digital media that they expect and take for granted that your student portal will be as Internet savvy as they are.

With the Config UERP ® Student Portal, you easily exceed student expectations with a powerful, easy-to-use platform offering 24/7 access to the information and services students depend on. Students can register online, check their grades, accept financial aid, pay bills, and handle all their institutional business from anywhere, anytime.

Special highlights of the Config UERP Student Portal include:

- Full integration - As an integrated part of the Config UERP ERP solution, portals share the data and programming of the overall system for complete consistency and efficient operations.
- Student information updates - Students can update their own basic information-- each institution has the full decision-making power in determining which, if any, address can be changed (such as local, home, and others).
- Student directories - View a student directory online with e-mail links readily available. Because the portals share the data and code with the system, you can be sure that only those students who have provided the appropriate release information will appear in the directory.
- Built-in Course Management - Config UERP ERP solution provides a complete Course Management system as an integrated part of the portals with online testing, online grading and complete tools for communications and collaboration. Course Management makes it easy to move your classes online.
- Campus news - Students can view news announcements specific to your institution.
- Online Course Evaluations - Never scan another bubble sheet. Config UERP online course evaluation tool ties directly into the grading system allowing your institution to require evaluation before releasing grades.
- Calendaring - Students can access a personalized calendar that tracks everything from institution-wide events to specific student tests.
- Accessibility - The Config UERP Student Portal is designed to follow accessibility standards like Section 508, so students with assistive devices can easily navigate and access services and information.
- Unlimited customization - Because Config Systems provides the portal code with the application, your institution has the ability to make changes to the appearance of the portal — colours, arrangement of page items, functions and more.



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Academic ERP Course Management/Learning Management System

Imagine the power of your institution's course management system working seamlessly as part of a totally integrated academic ERP built around a secure, single shared database.

Imagine providing unlimited Web access to students, faculty and staff to extend the capabilities of course management delivery while making all aspects of student administration — including flawless, easy online course delivery — fully accessible in real-time from any Web-browser.

Now you can stop imagining and start implementing.

Config UERP Course Management's unmatched power breaks new ground in higher education administration. Our learning management system is fully integrated with the Config UERP student information system to make the administration of online courses quick and easy while providing students immediate access to course registration. This isn't just another overnight batch process, this is a 100-percent real-time integration that shares the same information as the rest of the system.

Students and instructors have full, immediate access to online course management for all classes in which they are enrolled or scheduled. They easily share course information and content, including documents, video lectures, online testing, grades, announcements, real-time rosters, forums, chat rooms automatic course evaluations and much more.

Here are some of the many benefits of Config UERP Course Management:

- Completely built into the portals and Config UERP .
- No data export, import, complicated setup or duplicate data entry.
- Date/time-sensitive course announcements made easy.
- Intuitive tools for e-mailing students.
- Ability to push instructional events to student's calendars.
- Online documents and assignments for courses.
- Collaborative tools for interaction.
- Online testing and automated grading.
- Online course evaluations.
- Student assignment uploads.
- Online grade book with automatic calculations.
- Electronic grade submission to registrar's office.
- Faculty Course Management/LMS

Config UERP offers faculty advanced features including:

- Post course information.
- Track student activity (usage, hits).
- Post course announcements.
- Receive document and files from students.
- Share documents and files.
- Manage grade books and record grades.
- Post items to student calendars.
- Submit calculated grades.
- Share hyperlinks.
- Track student attendance.
- Manage own contact information.
- Manage online testing.
- Provide textbook information.
- Automatically update class rosters in real-time.
- Manage forums and chat rooms.
- Copy content and archive files.
- E-mail or text students and advisees.



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Student Course Management/LMS

Today's students want Web-bases immediacy and ease of use. We get it, so they get it. With Config UERP students can:

- Participate in forums and chat rooms.
- View course announcements.
- Upload documents and files to instructors.
- See online calendar key deadlines and dates.
- Download files from instructors.
- Access links to related Web sites.
- View progress reports (grade book view).
- View instructor contact information.
- View grades.
- Send e-mail directly to instructor.
- Online testing.
- Access textbook information.
- View course information.
- Check own portal usage, hits.

Academic ERP Room Scheduling

With unpredictable economic conditions continuing to impact higher education, efficiently managing campus real estate and other assets has never been more important. With Config UERP ® Room Scheduling feature, you can manage reservations for all classrooms, meeting rooms and special school equipment such as audiovisual gear and campus vehicles. Config UERP allows for requests and approvals on multiple levels with e-mail notifications built in. Classroom scheduling is also included in searches. With Config UERP you can:

- Track all rooms and their assignments.
- Assign both recurring and non-recurring reservations.
- Automatically check the course offering schedule for meeting time conflicts.
- Specify the required room capacity, equipment needed and any other special arrangements.
- Handle multiple campuses.
- Track inventory of equipment in each room.
- View status of each request on demand.



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Academic ERP Housing and Meals

My playlist, my favourite this, my favourite that...in a social media world, students today take personalization for granted. Now you can, too. Config UERP ® Student Housing and Meals solution handles many aspects of residence hall management by automating and personalizing housing assignments, billing, housing preferences, meal contracts, pricing and occupancy reports.

Our flexible architecture lets you match students based on compatibility, perform billing tasks that integrate fully with the Student Billing solution, and apply meal contracts separately or in conjunction with room assignments.

- Other features let you:
 - Manage an unlimited number of campuses and buildings with infinite space inventories.
 - Assign rooms automatically or manually.
 - Track room key issue and return dates.
 - Input student room preferences based on roommate criteria (e.g. whether they tolerate noise, want visitors, wake up early, desire clean room and such).
 - Perform room transfers as needed.
 - Set up prices and refund dates per term.
 - Transfer room assignments automatically from one term to the next.
 - Set up prices and refund dates per term.
 - Transfer room assignments automatically from one term to the next.
 - Generate comprehensive reports such as occupancy, vacancy and student analysis.
 - Handle room scheduling.

You can also record, track and report on disciplinary actions for students, staff, faculty and other campus visitors using the included Campus Incident functionality – helping you maintain a complete record of security incidents and infractions for your campus. With Config UERP you can:

- Maintain a history of infractions.
- Track incidents using your preferred terminology.
- Records can be searched by incident type or person.
- Secure access to incidents based on roles-based permissions.
- Manage a campus disciplinary action point system.
- Easily generate reports and statistics for incidents.

