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

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
  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  Portland OR 97219
Northeast = NE
Southeast = SE

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 | 1550 N Cedar Drive |
| South = S | 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 |
| Street   | = St  |
| Highway  | = Hwy |
| Drive    | = Dr  |
| Place    | = Pl  |
| Loop     | = Lp  |
| Circle   | = Cir |
| Court    | = Ct  |
| Parkway  | = Pkwy|
| Pi       |       |

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 187th 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
   CITY: Nankai University
   STATE: Beijing
   ZIP:
   COUNTRY: CH (Republic of China)

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

<table>
<thead>
<tr>
<th>US Possessions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>American Samoa</td>
<td>AS</td>
</tr>
<tr>
<td>Federated States of Micronesia</td>
<td>FM</td>
</tr>
<tr>
<td>Guam</td>
<td>GU</td>
</tr>
<tr>
<td>Marshall Islands</td>
<td>MH</td>
</tr>
<tr>
<td>Northern Mariana Islands</td>
<td>MP</td>
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<tr>
<td>Palau</td>
<td>PW</td>
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<tr>
<td>Puerto Rico</td>
<td>PR</td>
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<tr>
<td>Virgin Islands</td>
<td>VI</td>
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