



# Student Records SLCM\_AD\_310



## Course Instructions



- Click **Attachments** (upper right corner)



- Click **QRC Course Navigation** pdf



- Print the pdf
- Use the pdf to navigate the course and take the Assessments at the end of each unit



## Course Content



This course is intended for end-users in colleges and other departments who update student information. Most transaction will be completed via the *myUK* portal, although some users will have access to the IRIS Production system (SAPGUI). Content includes viewing class rolls, unofficial transcripts, student file and master data, holds, majors/minors, programs of study, progression results, addresses, and emergency contact information.

- Introduction
- Unit 1 – Student Administration Tab
- Unit 2– Student File vs. Student Master Data
- Unit 3 – Student File
- Unit 4– Student Master Data
- Course Summary

## Learning Objectives



- Upon completing this course, you will be able to:
  - ♦ Understand the difference between Student File and Student Master Data
  - ♦ Create/activate/inactivate holds
  - ♦ View progression results
  - ♦ Create/change student addresses
  - ♦ Create/change advisor
  - ♦ Create related person
  - ♦ View student records via myUK Portal



## Prerequisites and Roles



- Prerequisites
  - ♦ UK\_100 IRIS Awareness & Navigation
  - ♦ SLCM\_200 Student Lifecycle Management Overview
- Roles
  - ♦ Student Lifecycle Management End Users
  - ♦ Admission/Registrar Office

## Access



- In order to access student records, the user needs:
  - ♦ To complete the **SLCM\_AD\_310 Student Records** course and pass the assessment
  - ♦ To be designated as a person with the responsibility for managing student records
  - ♦ To sign the Statement of Responsibility (SOR)
    - Instructions available at:  
[http://www.uky.edu/IRIS/train/SOR\\_Information.html](http://www.uky.edu/IRIS/train/SOR_Information.html)
    - If you have signed the SOR in UK\_100, you do not need to sign it a second time



## Access



- The access you receive for this course will be specific for your needs.
- You may not be able to access every transaction described in the course.
- If you do not have all the access you feel you need, please work with your college contact to get this access assigned
  - ♦ The college contact list is located at [http://www.uky.edu/IRIS/CM/cm\\_group.html](http://www.uky.edu/IRIS/CM/cm_group.html)



## Student Records

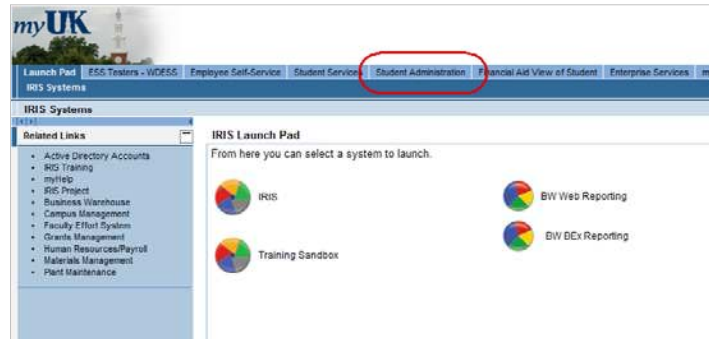


- Student records may be accessed using either the **PIQST00** transaction in **IRIS Production** or **Student Administration** Tab via the *myUK* portal.
- Examples include:

Student Administration Tab	PIQST00
Inactivate Advisor holds only	Activate/inactivate all holds
Change addresses	Create/change addresses
View/print student schedule	Create/change advisors
View/print class rolls	View external transcripts/tests
View/print unofficial transcripts	View/create/change program of study, majors, minors, etc.
Book students	View progression results
Grade students	View requirement catalogs
Override course restrictions	View/create/change status



## Unit 1



## Student Administration Tab

## Unit 1 – Student Administration Tab



- Class Rolls
- Unofficial Transcript
- Student Self-Service Tips



## Student Administration Tab

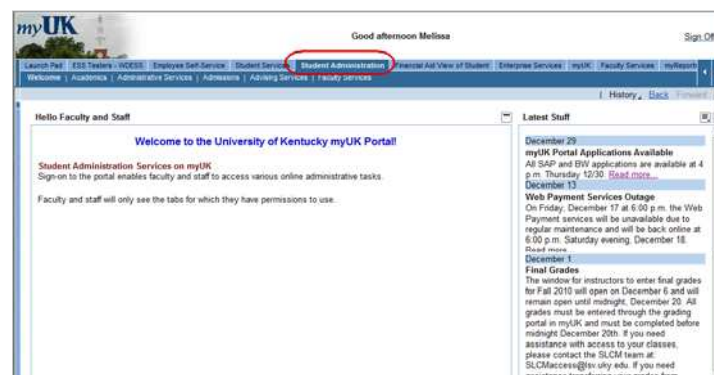


- It is easier to find and display basic student record information in the myUK portal than in the IRIS system.
- However, not everything can be done in the portal.
  - ♦ For example, you can **see** Holds and Stops, but you cannot **create** them in the portal.
  - ♦ Holds can only be **created** in the IRIS system.

## Student Administration Tab



- The **myUK portal** provides different views and information for different users depending on their security access.

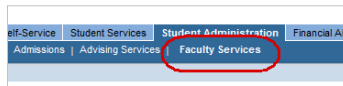




## Class Rolls



- Class rolls can be viewed and printed by authorized faculty and staff from the portal.
  - ♦ They may be viewed and/or printed at various times before and during the semester to have up-to-date information about students who are officially enrolled in a course.
- Use the following steps to view or print class rolls.
  - ♦ Click **Faculty Services**



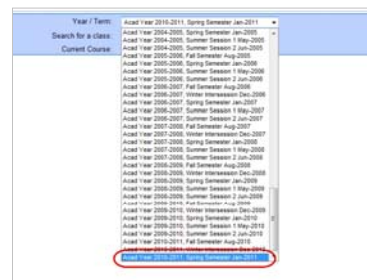
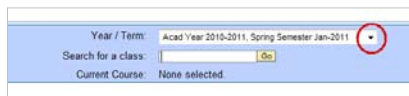
- ♦ Click **Class Rolls**



## Class Rolls



- ♦ To choose the appropriate Academic **Year/Term**, click on the drop-down list icon
- ♦ Double-click on the appropriate year and term





## Class Rolls



- ♦ You can search for the Course Subject and Number in one of the following ways:

- Course Subject & Number, such as ENG 104
- Course Subject, such as ENG
- Part of the course title, such as Writing

## Class Rolls



- ♦ Type in the course subject and number in the **Search for a class** field

- **Note:** Remember when typing a two-digit course subject, you will need to type **TWO** spaces before you type the course number!

- ♦ Click **Go**



## Class Rolls



- ♦ **Note:** A list of all possible class rolls for the course will display.

- ♦ Click on the appropriate course and section link

COURSE	Section	MTWTF 8:00 am- 8:50 am	Whitehall Classroom Bldg Whitehall Classroom Bldg-Rm 201
ENG 104	<a href="#">004</a>	8:50 am	CB James M. Manneil
ENG 104	<a href="#">004</a>	TYRF 8:00 am- 8:50 am	Barker Hall Barker Hall-Rm 301-BH (Hether D. McMyre)
ENG 104	<a href="#">004</a>	W 8:00 am-8:50 am	Whitehall Classroom Bldg Whitehall Classroom Bldg-Rm 306- CB (Phil Allen Swenson)
ENG 104	<a href="#">004</a>	TR 8:00 am-9:15 am	Whitehall Classroom Bldg Whitehall Classroom Bldg-Rm 306- CB (Phil Allen Swenson)
ENG 104	<a href="#">004</a>	TR 12:30 pm- 1:45 pm	F Paul Anderson Tower F Paul Anderson Tower-Rm 207-PPAT (Jenna L. Goldsmith)
ENG 104	<a href="#">004</a>	M 12:00 pm-	Funkehouse Biological Sciences Building Funkehouse Building-

- ♦ **Note:** Section information includes:

- ♦ Meeting times
- ♦ Location (if available)
- ♦ Instructor (if available)

## Class Rolls



- ♦ **Note:** Roster information includes:

- Student name
- Student number
- Username
- Email address
- Degree
- Major/Minor
- Classification
- Hour(s)
- Status

ENG 104 Section 002 (4.0)								
TYRF 8:00 am - 8:50 am								
Barker Hall Barker Hall-Rm 301-BH ( )								
Roster (20 enrolled students) <a href="#">Export to Excel</a> <a href="#">Print</a>								
Name	Student Number	Username	Email	Degree	Major/Minor	Classification	Hour(s)	Status
	10594473	000224	<a href="#">quity.edu</a>	BAEDU-ED	BAEDU	Undergrad - Freshman	4.0	
	10698524	000224	<a href="#">quity.edu</a>	BBA-BE	PFIN-BBA	Undergrad - Freshman	4.0	
	10710845	000223	<a href="#">quity.edu</a>	BACH-US	USUS-BACH	Undergrad - Freshman	4.0	
	10748452	000222	<a href="#">quity.edu</a>	BMIE-FA	MUED-BMIE	Undergrad - Freshman	4.0	
	10721528	0004208	<a href="#">quity.edu</a>	BS-AS	BOL-BIS	Undergrad - Freshman	4.0	
	10451968	000223	<a href="#">quity.edu</a>	BACH-US	USUS-BACH	Undergrad - Freshman	4.0	
	10705382	0004222	<a href="#">quity.edu</a>	BAEDU-ED	BESS-BAEDU	Undergrad - Freshman	4.0	
	10622254	000224	<a href="#">quity.edu</a>	BS-AS	ALAL-BIS	Undergrad - Freshman	4.0	
	10660087	000222	<a href="#">quity.edu</a>	BMIE-FA	MUED-BMIE	Undergrad - Freshman	4.0	
	10801944	000222	<a href="#">quity.edu</a>	BAEDU-ED	DELB-BAEDU	Undergrad - Freshman	4.0	
	10706726	000222	<a href="#">quity.edu</a>	BHS-AH	PCLS-BHS	Undergrad - Freshman	4.0	
	10700522	000223	<a href="#">quity.edu</a>	BBA-BE	PMAR-BBA	Undergrad - Freshman	4.0	



## Class Rolls



- Click **Print** to print the roster

ENG 104 Section 002 (4.0)  
TWRP 8:00 am - 8:50 am  
Barker Hall Barker Hall-Rm.301-BH ( )

Roster (20 enrolled students) [Export to Excel](#) [Print](#)

Name	Student Number	Username	Email
------	----------------	----------	-------

- Click **Export to Excel** to download the roster to an Excel spreadsheet

ENG 104 Section 002 (4.0)  
TWRP 8:00 am - 8:50 am  
Barker Hall Barker Hall-Rm.301-BH ( )

Roster (20 enrolled students) [Export to Excel](#) [Print](#)

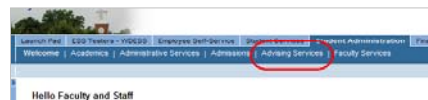
Name	Student Number	Username	Email
------	----------------	----------	-------

## Unofficial Transcript

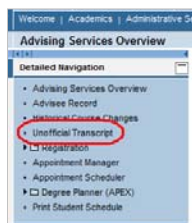


- Use the following steps to view and print a student's **Unofficial Transcript**.

- Click on **Advising Services**



- Under the **Detailed Navigation** menu (on the left side of the screen), click on **Unofficial Transcript**





## Unofficial Transcript



- Use the **Enter Search Criteria** screen to search for the student by:

- User name (AD User ID)
- Last name
- First name
- Student number (IRIS-generated Student ID number)

- Click on the **Search** button

- On the list of possible matches, locate the row of the student whose unofficial transcript you wish to view, then click on the **Transcript PDF** link in that student's row

Student Number	First Name	Middle Name	Last Name	Name at Birth	Date of Birth	
10037714	Derek	Henry	Pitt		1955-03-03	<a href="#">Transcript PDF</a>
10037856	DEREK		PITT		1980-12-15	<a href="#">Transcript PDF</a>

## Unofficial Transcript



- The transcript will be displayed as a PDF document.

- Note:** Click the red **Close** icon in the top-right corner of the screen to close the PDF version of the student unofficial transcript.

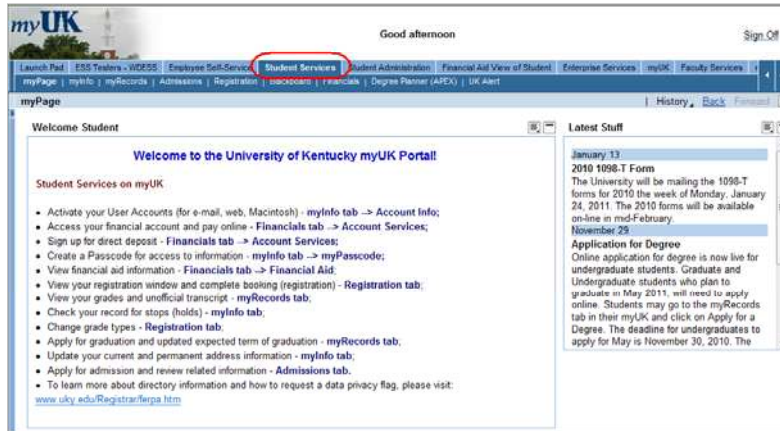




## Student Self-Service Tip



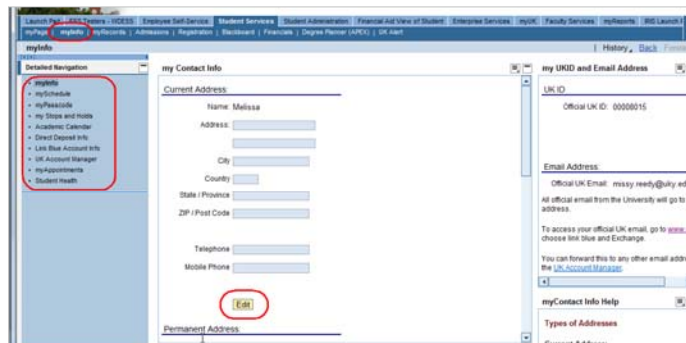
- Students can manage some of their own records by logging into *myUK* and using the **Student Services** tab.



## Student Self-Service Tip



- On the **myInfo** tab, the student can:
  - Change addresses,
  - View/print a schedule of classes, and
  - View stops and holds.

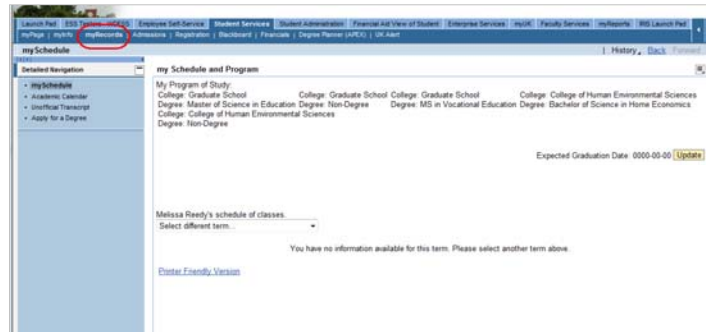




## Student Self-Service Tip



- On the **myRecords** tab, the student can:
  - View/print a schedule of classes,
  - View the Academic Calendar,
  - View/print an Unofficial Transcript, and
  - Update the Expected Graduation Date.



## Student Self-Service Tip



- On the **Admissions** tab, the student can:
  - Access the Graduate Admissions Form,
  - Access the Undergraduate Admissions Form,
  - Access the Academic Calendar, and
  - Access the UK Course Catalog.







## Unit 1 Assessment

### SLCM\_AD\_310 Unit 1

Question 1 of 4

Everything regarding student records can be done in the *myUK* portal.

- ☐ True
- ☐ False

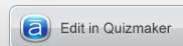
#### PROPERTIES

On passing, 'Finish' button:  
On failing, 'Finish' button:  
Allow user to leave quiz:  
User may view slides after quiz:  
User may attempt quiz:

Goes to Next Slide  
Goes to Previous Slide  
After user has completed quiz  
At any time  
Unlimited Times



Properties...



Edit in Quizmaker



## Summary



- myUK Student Administration Portal
  - ♦ Class Rolls
  - ♦ Unofficial Transcript
  - ♦ Student Self-Service Tips

## Unit 2



# PIQST00 Student File and Master Data



## Unit 2– PIQST00 Student File and Master Data

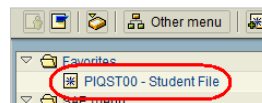
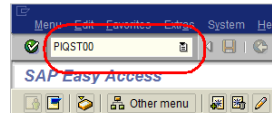


- Accessing PIQST00
- FERPA Warning
- Navigation Between Student File and Student Master Data

## PIQST00



- **SECURITY ACCESS NOTE:** Your access may not include access to the IRIS R/3 SLCM transaction screen PIQST00 or some of the transactions on this screen
  - ♦ Most transactions can be accomplished through the portal, therefore access to this screen may not be needed
  - ♦ Please check with your ASO, if you feel you need access to this screen
- In production, use one of the following methods to access **PIQST00** which contains both **Student File** and **Student Master Data** records
  - ♦ Enter **PIQST00** in the command field and press **Enter**
  - ♦ Add **PIQST00** to your favorites (preferred by most users)

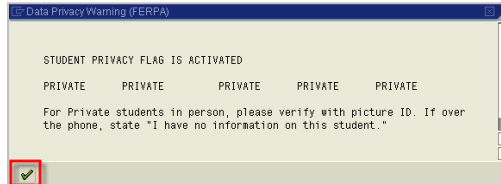




## FERPA Warning



- When you open a student's records, a pop up window containing the FERPA warning will appear if the student has placed a privacy flag on the records.
- To move past the warning, click on the **Continue** icon.

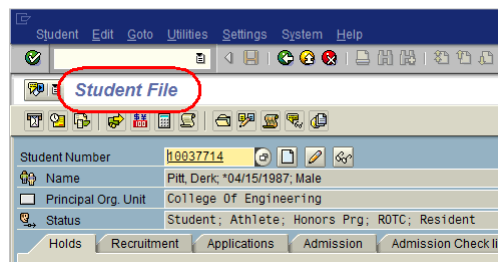


- For more information on FERPA and how it affects student records, refer to your [SLCM\\_200 Student Lifecycle Management Overview](#) course material or check with your Dean's office.

## Student File → Student Master Data



- When you initially open the **PIQST00** transaction, the **Student File** screen will display.



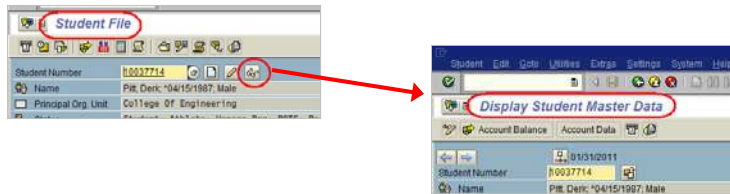
- For basic information regarding these screens, refer to your [SLCM\\_200 Student Lifecycle Management Overview](#) course material.



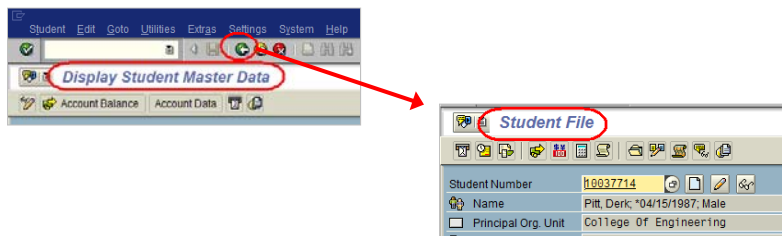
## Student File → Student Master Data



- To go from **Student File** to **Student Master Data**, click on **Display** (the glasses).



- To go from **Student Master Data** to **Student File**, click on **Back**.



## Unit 2 Assessment



**SLCM\_AD\_310 Unit 2**

Question 1 of 2 ▾


To go from the **Student Master Data** screen to the **Student File** screen, click on the **Back** icon.


☐ True

☐ False

**PROPERTIES**  
On passing, 'Finish' button:  
On failing, 'Finish' button:  
Allow user to leave quiz:  
User may view slides after quiz:  
User may attempt quiz:

[Goes to Next Slide](#)  
[Goes to Previous Slide](#)  
[After user has completed quiz](#)  
[At any time](#)  
[Unlimited Times](#)


 Properties...


 Edit in Quizmaker

SLCM\_AD\_310 Student Records 37 of 106

## Summary

- Accessing PIQST00
- FERPA Warning
- Navigation Between Student File and Student Master Data

 IRIS  
Integrated Resource  
Information System

 UNIVERSITY OF KENTUCKY

SLCM\_AD\_310 Student Records 38 of 106





## Student File

- Key Date Field
- Holds
- Majors/Minors/Options Tab
- Registration Tab & Program of Study
- Requirement Catalogs
- Program Type Progression
- Status
- Advisor(s)
- Degree Application Process
- Student Notes



## Key Date Field



The screenshot shows the 'Status' tab of the IRIS Student File window. The 'Key Date' field is highlighted with a red circle. The field contains the date '01/31/2011'. Below the field, there is a 'Period' section with a checked box and a date range from '01/31/2011' to '12/31/2011'.

- The **Key Date** is the date as of which IRIS displays, processes, or creates student data
  - ♦ The **Key Date** determines what data you see for a student
  - ♦ If you use the **current date**, IRIS will show you what is current for the student
  - ♦ You can enter a date directly into the **Key Date** field
- Refer to [SLCM\\_200 Student Lifecycle Management Overview](#) course material to review how to change the Key Date

## Holds



- The **Holds** tab is the default tab on the **Student File**.
- It allows you to view, activate, or inactivate holds.

The screenshot shows the 'Holds' tab of the IRIS Student File window. The 'Key Date' field is highlighted with a red circle. Below the field, there is a 'Period' section with a checked box and a date range from '01/31/2011' to '12/31/9999'. Below the period section, there is a table of holds.

Hold Type	Status	Hold Grouping	Start Date	End Date	Object Description
Advisor Hold	◇	Academic	04/26/2006	12/31/9999	Plt. Clerk
Young Library Hold	■	Financial	10/23/2009	12/31/9999	Plt. Clerk
Parking Citation Hold	◇	Financial	01/29/2007	12/31/9999	Plt. Clerk

- The **Status** indicator lets you know if the hold is active (green square) or inactive (gray diamond).

Hold Type	Status	Hold Grouping	St
Advisor Hold	◇	Academic	04
Young Library Hold	■	Financial	10
Parking Citation Hold	◇	Financial	07



## Holds



- Students can see information regarding their holds in the **myUK Portal**.
- Use the following steps to display Hold contact information.

- Click on the **Select** icon to the left of the hold

Hold Type	Status	Hold Grouping	Start Date
Advisor Hold	Academic	04/26/20	
Young Library Hold	Financial	10/23/20	
Parking Citation Hold	Financial	01/29/20	

- Click the **Display** icon to open the hold record

Hold Type	Status	Hold Grouping	Start Date
Advisor Hold	Academic	04/26/20	
Young Library Hold	Financial	10/23/20	
Parking Citation Hold	Financial	01/29/20	

## Holds



- The **Maintain Holds** window will appear.
- To see contact information to remove the hold, click on the **Contact Address** button.
- The **Contact Address** window will appear with contact information for the selected hold.
- Click on the **Continue** button to return to the previous screen.

Student: 19937714  
Name: PHE, Darr, 10/15/1987, Male

Hold: 9504 Young Library Hold  
Hold Grouping: Financial  
Status: In-Name: 00  
Valid From: 10/23/2009 to 12/31/9999

Buttons: Contact Address, Change Information

Young Library Hold - Call 257-5500 ext. 2967



## Holds – Create

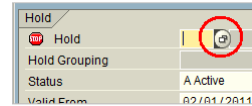


- Use the following steps to place a new hold on a student record.

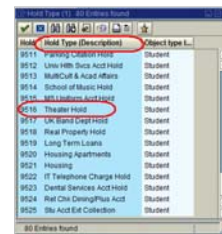
- Click on the **Create** icon located on the **Holds** tab



- When the **Maintain Holds** appears, click on **Possible Entries** in the **Hold** field to view the list of eligible hold types



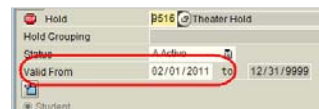
- Double-click on the appropriate hold
  - Note:** You can sort the hold type list by clicking on the **Hold Type (description)** column heading



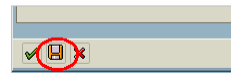
## Holds – Create



- Change the default current date in the **Valid From** field, if needed



- Click on the **Save** icon



- Note:** The hold will be displayed with a green square in the **Status** field.

Hold Type	Status	Hold Grouping	Start Date	End Date
Advisor Hold	◊	Academic	04/26/2006	12/31
Young Library Hold	■	Financial	10/23/2009	12/31
Parking Citation Hold	■	Financial	04/23/2007	12/31
Theater Hold	■	Financial	02/01/2011	12/31



## Holds – Deactivate



- Use the **myUK Portal** to deactivate Advisor Holds
  - ♦ See the SLCM\_WP\_310 Advising course at [http://myhelp.uky.edu/rwd/HTML/SLCM/SLCM\\_WP\\_310.html](http://myhelp.uky.edu/rwd/HTML/SLCM/SLCM_WP_310.html)
- Use the following steps to deactivate other holds:
  - ♦ Click on the **Select** icon to the left of the hold you want to deactivate
  - ♦ Click on the **Active**  $\leftrightarrow$  **Inactive** icon
  - ♦ Change the defaulted current date in the **Valid From** field, if needed
  - ♦ Click on the **Save** icon

Hold Type	Status	Hold Grouping
Advisor Hold		Academic
Young Library Hold		Financial
Parking Citation Hold		Financial
Theater Hold		Financial

Period: 02/01/2011 to

Hold Type: Advisor Hold Status: Academic Hold Grouping:

Hold Grouping: Financial

Status: **Inactive**

Valid From: 02/01/2011 To: 12/31/99

Save

## Majors/Minors/Options



- Majors, Minors, Options, Specialties, and Sub-specialties may be viewed on the **Majors/Minors/Options** tab.

Personal Log Out Settings Off Engineering Student: Activities: History: Prog: N/A: Non-cert

Applications | Admissions | Admission Check | **Majors/Minors/Options** | Reports

Selection Criteria: All programs

Program: 1042031 BSENE EN BSE Bachelor of Science in Engineering

Key Date: 02/02/2011

Acad. Specializations: Acad. Specializations Acad. Specializations

Program Group Cat. Prog. Module Group Description Start date End Date

1042031 Major 1 BSENE & Agricultural Eng 1042031 12/31/99

- The **Key Date** is very important on this tab.
  - ♦ If you know a major exists, but you cannot see it, it may be due to the major having a later date than the one in the **Key Date** field, so you may need to delete the **Key Date** and press **Enter**.

Selection Criteria: All programs

Program: 1042031 BSENE EN BSE Bachelor of Science in Engineering

Key Date: 02/02/2011

Acad. Specializations: Acad. Specializations Acad. Specializations

Program Group Cat. Prog. Module Group Description Start date End Date

1042031 Major 1 BSENE & Agricultural Eng 1042031 12/31/99



## Majors/Minors/Options

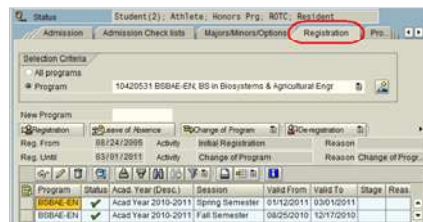


- Each Program of Study must have a major.
- There should only be one Priority 1 major, unless certain circumstances occur, such as in the following situations.
  - ♦ The majors are effective at different time periods (no overlap).
  - ♦ The majors are in different programs of study, even if the time periods overlap.
- To see a history of changes in a student's major **within** a particular program, make sure the program is displaying in the **Program** field.
  - ♦ You may need to change or delete the Key Date.

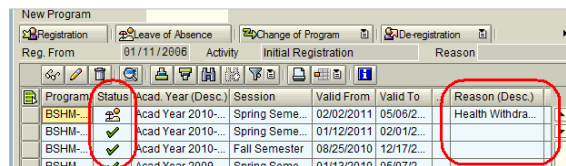
## Registration



- The **Registration** tab will be populated automatically by the admission process, and for each continuous semester in which the student is enrolled



- Registrations may have various statuses





## Registration



- Several registration processes are recorded on this tab.

### Change of Program



- Used to move student from one Program of Study to another when the major belongs to a different degree (i.e., change from BA-AS to a BBA-BE)
- Used to suspend from College and move to another Program of Study

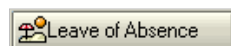
Program	Status	Acad. Year	Session	Valid From	Valid To	Reason (Desc)
BSA-BE	✓	Acad Year 2010...	Spring Seme...	03/02/2011	05/05/2...	
BBAE-EN	✓	Acad Year 2010...	Spring Seme...	01/12/2011	03/01/2...	
BBAE-EN	✓	Acad Year 2010...	Fall Semester	08/29/2010	12/17/2...	
BBAE-EN	✓	Acad Year 2009...	Spring Seme...	01/13/2010	05/07/2...	
BBAE-EN	✓	Acad Year 2009...	Fall Semester	08/26/2009	12/18/2...	
BBAE-EN	✓	Acad Year 2008...	Spring Seme...	01/14/2009	05/09/2...	

- Information regarding changing program and majors is provided in the [SLCM\\_AD\\_340 Program of Study and Majors](#) course.

## Registration



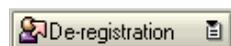
### Leave of Absence – Registrar's Office



- Used when the student withdraws after classes begin (Health, Financial, etc.)

Program	Status	Acad. Year	Session	Valid From	Valid To	Reason (Description)
BSHM-AG	✓	Acad Year 2010...	Spring Seme...	02/0...	05/0...	Health Withdraw 80%
BSHM-AG	✓	Acad Year 2010...	Spring Seme...	01/1...	02/0...	

### De-Registration – Registrar's Office



- Used when the student graduates
- Used when the student doesn't return to UK
- Used when the student cancels registration before semester begins
- Used for a University suspension

Program	Status	Acad. Year	Session	Valid From	Valid To	Reason (Description)
BSHM-AG	✓	Acad Year 2010...	Spring Seme...	02/0...	05/0...	Health Withdraw 80%
BSHM-AG	✓	Acad Year 2010...	Spring Seme...	01/1...	02/0...	

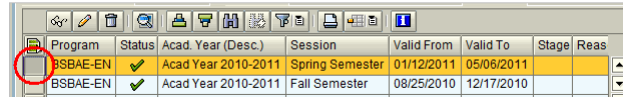


## Registration



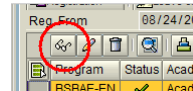
- Use the following steps to view the details of a registration.

- ♦ Click on the **Select** icon to the left of the registration row



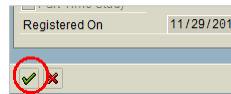
Program	Status	Acad. Year (Desc.)	Session	Valid From	Valid To	Stage	Reas
BSBAE-EN	✓	Acad Year 2010-2011	Spring Semester	01/12/2011	05/06/2011		
BSBAE-EN	✓	Acad Year 2010-2011	Fall Semester	08/25/2010	12/17/2010		

- ♦ Click on the **Display** icon



- ♦ View the registration

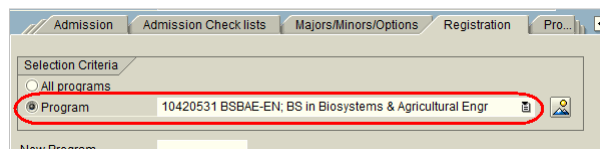
- ♦ Click on the **Continue** icon to close the **Sessional Registration** window



## Program of Study



- If the student is currently enrolled, the current Program of Study should display in the **Program** field on the **Registration** tab.
  - ♦ Choosing the **Program** radio button displays the details for a specific program.



- Choosing the **All Programs** radio button will display all programs in which the student is or has been registered.





## Program of Study



☐ All programs  
☒ Program 10420531 BSBAE-EN; BS in Biosystems & Agricultural Engr

- By clicking on the **Program Overview** icon, all program(s) in which the student is still enrolled, as well as any programs in which the student has de-registered will be displayed.
- The **Valid From** and **End Date** for each program is displayed.

Program Overview

Student Number: 10037714

Name: Pitt, Derk; \*04/15/1987; Male

Program	Program (Description)	Status	Sts Long Text	ic...	Rea	Start Date	End Date
BSBAE-EN	BS in Biosystems & Agricultural...	Student				08/24/2005	12/31/9999
BSBAE-EN	BS in Biosystems & Agricultural...	Admitted App...				08/24/2005	12/16/2005

## Main vs. Additional Program of Study



- When a student has more than one program of study at the same time, only one of the programs shall be the **Main** program.
- All other programs should be designated as **Additional** programs.
- By viewing the details of a session for a program, you can view whether the program is **Main** or **Additional**.

Registration Data

Registration Status: 1 Attending

☒ Main Program
 ☐ Additi program

Registration Type: 01 Regular Student



## Program of Study



- Use the following steps to view the next Program of Study.
  - ♦ Click on the **Drop-down List** icon at the end of the **Program** field
  - ♦ Select the next program to populate the **Program** field

- ♦ **Note:** If multiple Academic Sessions are displayed for this program, highlight the row for the current session, then click on the **Display** icon.

Reg. From	Program	Status	Acad. Year	Activity
	BSHM-AG		Acad Year 2010...	Display
	BSHM-AG		Acad Year 2010...	

## Requirement Catalogs



- The **Requirement Catalogs** tab lists **Audit Types**.

- The following **Audit Types** will automatically be set via an admission workflow process:
  - ♦ College Requirements
  - ♦ Major Requirements
  - ♦ USP Requirements
  - ♦ Graduation Requirements

Main Cat.	Audit Type	Audit Type (Desc.)	Catalog	Catalog	Reqmt Catalog (Ds.)	Version	Vers. (Ds)
9000	University of Kentucky		0001	University Studies Program	822	2006-10	
9000	University of Kentucky		0003	College Requirements	822	2006-10	
9000	University of Kentucky		0004	Major 1	822	2006-10	



## Requirement Catalogs



- The information on this tab lets APEX know from which Bulletin to pull the requirements for the student.
  - A student could be admitted to Fall 06, so his USP and Graduation catalog is Fall 06.
  - However, if the student changes majors in Spring 11, the major will have a different catalog of Spring 11 while the USP requirements are still pulled from Fall 06.

Main	Audit	Audit T...	Cat...	Catalog	Reqmt Catalog (Ds.)	Version	CatVersion(Ds.)
<input checked="" type="checkbox"/>	9000	Univer...	0001	University Studies Program	822	2006-10 Fall	
<input type="checkbox"/>	9000	Univer...	0004	Major 1	800	2011-30 Spring	
<input type="checkbox"/>	9000	Univer...	0002	Graduation Requirements	800	2011-30 Spring	
<input type="checkbox"/>	9000	Univer...	0003	College Requirements	800	2011-30 Spring	

- Requirement Catalogs are automatically updated when:
  - A student changes programs and/or majors, or when
  - A student adds an additional major or minor.

## Program Type Progression



- The **Program Type Progression** tab contains
  - Academic Honors (Dean's List, etc.)
  - Academic Standing (Probation, Suspension, etc.)
  - Progression Classification (Freshman, Sophomore, etc.)

Prog.Type	Prog. Category (Desc.)	Prog result (desc)	Result Sts	Start Date	To Date	Valid Fro
Undergraduate	Academic Honors	No Academic Ho...	Final	01/01/1900	12/17/2010	12/18/20
Undergraduate	Academic Standing	Good Standing	Final	01/01/1900	12/17/2010	12/18/20
Undergraduate	Progress Classification	Undergrad - Sop...	Final	08/25/2010	12/17/2010	12/18/20



## Progression Results

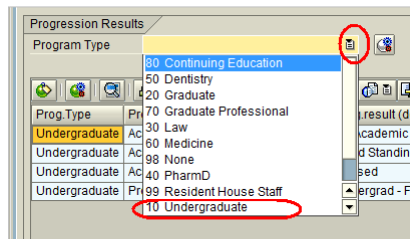


- Dates are very important when interpreting progression results.
  - ♦ **Key Date** – progression results are displayed as of the date displayed in the Key Date field; changing the key date will cause the progression values that are current on the key date selected to be displayed in the progression results area
  - ♦ **Valid From** – displays the date the progression results become valid
  - ♦ **Valid To** – displays the date through which the results are valid; the most recent progression results will show the date 12/31/9999
  - ♦ **Check From Date** – displays the date from which the academic work was checked
  - ♦ **Check To Date** – defines the date up to which academic work was checked

## Progression Results



- Use the following steps to be more specific in what you view for Progression Results.
  - ♦ Choose the appropriate program type by clicking on the drop-down list icon in the **Program Type** field



- The student's progression results will display as specified.



## Status



- Statuses will be created in an active status.
- Date created will default to current date (Note – you may manually change to desired date) and end date of 12/31/9999.
- **NOTE!** If a student changes a status (for example, is no longer an athlete), the status must be ended.
  - ♦ The end date must be changed from 12/31/9999 to the appropriate end date.
  - ♦ If this is not changed, the status will always remain on the student record.

## Status



Status (Description)	Status	Start Date	End Date	Object Description	St
Attending	Green Square	01/12/2011	05/06/2011	BS in Biosystems & Agricultural Engr	BS
Student	Green Square	06/24/2005	12/31/9999	BS in Biosystems & Agricultural Engr	BS
Athlete	Green Square	01/29/2006	12/31/9999	Ph.D. Clerk	CI
Honors Program	Green Square	01/25/2007	12/31/9999	Ph.D. Clerk	CI
ROTC	Green Square	01/25/2007	12/31/9999	Ph.D. Clerk	CI
Account Data Not Updated	Gray Diamond	11/23/2009	12/31/9999	Ph.D. Clerk	BS

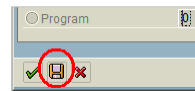
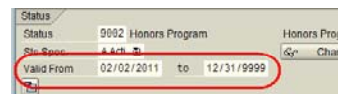
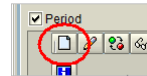
- In the **Status** column,
  - ♦ The green square indicates an active status, and
  - ♦ The gray diamond indicates an inactive status.



## Status – Create



- Use the following steps to create a status.
  - ♦ Click on the **Create** icon
  - ♦ Enter the **Status** code or use the **Possible Entries** to search for the appropriate code
  - ♦ Verify the **Valid From** and **To** dates
  - ♦ Click on **Save**



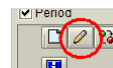
## Status – Change



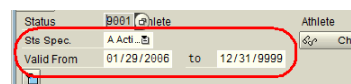
- Use the following steps to view a specific status.
  - ♦ Click on the **Select** icon to the left of the appropriate line

Student	08/24/2005	12/31/9999	BS in Biosystems & Agricultural Engr	Si
Athlete	01/29/2006	12/31/9999	Pitt, Derk	Cl
Honors Program	01/25/2007	12/31/9999	Pitt, Derk	Cl

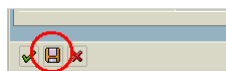
- ♦ Click on the **Change** icon located on the **Status** tab



- ♦ Change the **Status Specifications** (Active/Inactivate) or the validity dates



- ♦ Click on **Save**





## Advisors



- The **Advisor** tab allows one or more advisors to be assigned to a student.

Advisor ID	Adv. Typ.	Object type text	Advisor Name	Adv. funct.	Function (Desc.)	Contrib. Typ.	Con
10000642	CP	Central person	David A Bryant	PTMA	Academic - Main	PRTY	Pro

- Use the following steps to add an Advisor.
  - Click on **Create**

## Advisors – Create



- Click on the drop-down list icon in the **Advisor Type** field and select **Central Person**
- In the **Advisor ID** field, enter the advisor's ID number or search for it by clicking on the **Possible Entries** icon in the field
- Click on the drop-down list icon in the **Advisor Function** field, select **Academic–Main** for the student's primary advisor or **Academic–Additional** for other people who have advisor responsibilities for the student, such as the department's administrative staff



## Advisors – Create



- Click on the **Possible Entries** icon in the **Advising Context** field, select the appropriate program type, such as Undergraduate, Graduate, etc.

- Click on the **Save** icon

- The advisor's information will be displayed.

Advisor ID	Adv. Typ.	Object type text	Advisor Name	Adv. func	Function (Desc)	Contxt Typ
10016042	CP	Central person	Peter P Tarkington	PTMA	Academic - Main	PRTY

## Advisors – Create



- Use this process to change a student's advisor.
- Instructions include deleting the former advisor!
- Note:** Please check with your Dean's Office to confirm that you should delete the former advisor.

- Select the advisor you want to delete

Advisor ID	Adv. Typ.	Object
10016042	CP	Centra

- Click on **Delete**

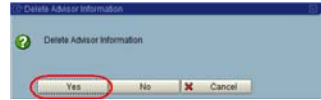
- Click on **Save**



## Advisors – Create



- Click **Yes** when the **Delete Advisor Information** box appears



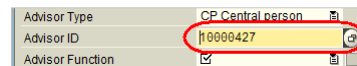
- To add the new advisor, click **Create**



- In **Advisor Type**, select **Central Person**



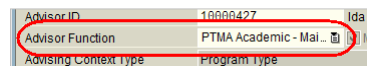
- Enter the **Advisor ID** or use the **Possible Entries** icon to search



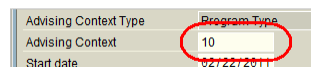
## Advisors – Create



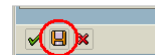
- In **Advisor Function**, click the drop-down list, and select **Additional** or **Main** as appropriate



- In **Advising Context**, click the **Possible Entries** icon to select the appropriate program type



- Click **Save**



- Note:** The update advisor information will be displayed.

Advisor ID	Adv. Typ	Object type text	Adv. Name	Adv. funct	Function (Desc)	Contb Typ	Contb
10000427	CP	Central person	Ida B. Lamb	PTMA	Academic - Main	PRTY	Progra



## Advisors – Delete

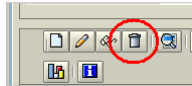


- Use the following steps to delete a student's advisor.
- **Note:** Please check with your Dean's Office to confirm that you should delete the advisor.

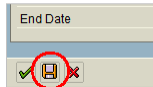
- ♦ Select the advisor you want to delete

Advisor ID	Adv. Typ.	Object type text	Advisor Name
10000427	CP	Central person	Ida B. Lamb
0016042	CP	Central person	Peter P. Tarkin

- ♦ Click on **Delete**



- ♦ Click on **Save**



## Advisors – Delete



- ♦ Click **Yes** when the **Delete Advisor Information** box appears



- ♦ **Note:** The advisor information is no longer displayed on the **Advisor(s)** tab.

Program Type Progression							
General Data							
Status							
Requirement							
Selection Criteria							
Key Date: 02/22/2011							
Advisor ID	Adv. Typ.	Object type text	Adv. Name	Adv. Email	Function (Desc)	Contd Typ	Contd
10000427	CP	Central person	Ida B. Lamb	PTMA	Academic - Main	PRTY	Progrs



## Degree Application Process



- Students apply for a degree through the **myUK Portal**
- A confirmation email is sent to the student and the student's degree application is sent to APEX
- APEX audit will return a result
- Colleges will have access to execute a report which includes students who have applied and the APEX result
- Colleges review list and remove students not eligible for degree
- APEX audits are executed for the final time
- Confer Qualification process posts the degree

## Degree Application Process



- Use the following steps to view the details of a degree application.
  - ♦ Go to the **Application for Degree** tab and double-click on the **Select** icon to the left of the appropriate application
  - ♦ Click on the **Display** icon
  - ♦ Click on **Continue** to close



## Student Notes



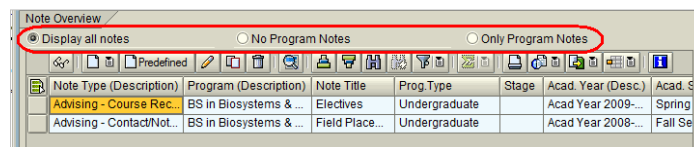
- Notes, such as Advising notes, can be added to the student's records.
- Notes can be placed on a particular Program of Study or on the student's main records.
- Changes, additions, or deletions may be made to the notes.
- Use the following steps to display notes.
  - ♦ Click on the **Notes Overview** icon



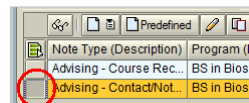
## Student Notes – Display



- ♦ When the **Note Overview** screen displays, three options are available
  - Display All Notes
  - No Program Notes
  - Only Program Notes



- ♦ To display a note, click on **Select**

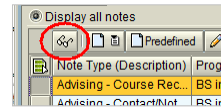




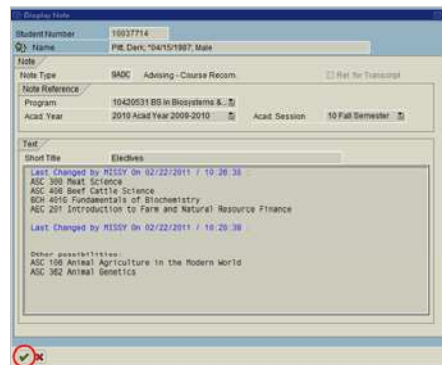
## Student Notes



- Click on the **Display** icon



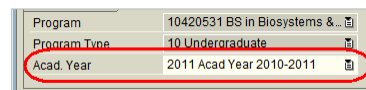
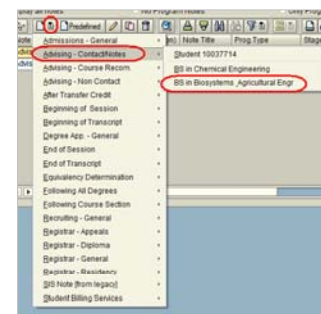
- The date for the original note will be listed at the top of the note
- Any additional changes will be added below the previous note
- Click on the **Continue** icon to close



## Student Notes – Create



- Use the following steps to create a note.
  - Pull up the student's records and click on the **Notes Overview** icon
  - On the **Note Overview** screen, click on the drop down list and select the type of note you want to create and where you want place it
  - Select the appropriate **Academic Year**





## Student Notes



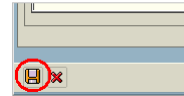
- ♦ Select the appropriate **Academic Session**

- ♦ In **Short Title**, enter a short title for the note

- **Note:** The title should provide a short description of the note's content.

- ♦ In the **Text** field, type your note

- ♦ Click on the **Save** icon



## Unit 3 Assessment



**SLCM\_AD\_310 Unit 3**


Question 1 of 4


The following **Audit Types** will automatically be set on the **Requirements Catalogs** tab:

- ☐ College, Major, Minor, and USP
- ☐ Major, Minor, USP, and Graduation
- ☐ College, Major, USP, and Graduation

**PROPERTIES**  
 On passing, 'Finish' button:  
 On failing, 'Finish' button:  
 Allow user to leave quiz:  
 User may view slides after quiz:  
 User may attempt quiz:

[Goes to Next Slide](#)  
[Goes to Previous Slide](#)  
[After user has completed quiz](#)  
[At any time](#)  
[Unlimited Times](#)


 Properties...


 Edit in Quizmaker

SLCM\_AD\_310 Student Records 83 of 106

## Summary

- Key Date Field
- Holds
- Majors/Minors/Options Tab
- Registration Tab & Program of Study
- Requirement Catalogs
- Program Type Progression
- Status
- Advisor(s)
- Degree Application Process
- Student Notes



 SLCM\_AD\_310 Student Records 84 of 106





## Student Master Data

### Unit 4– Student Master Data

- Addresses
  - ♦ Standard Address
  - ♦ Address Overview
- Related Persons



## Standard Address



- The **Standard Address** tab is used to view or edit a student's...
  - Standard address
  - Telephone number

## Address Overview



- The Address Overview tab is where you will manage or edit the following categories of addresses:
  - Standard
  - Current
  - International
  - Permanent
- Note:** This tab also allows you to designate a current address, a permanent address, and an international address.



## Address Overview



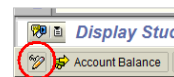
- **Address Overview** lists the various addresses for the students and the validity dates for the addresses.
- **Address Usages** lists how the addresses are categorized, such as permanent, standard, etc.

Co.	Address Description	Valid From	Valid To	Move
US	5478 Greene Ave. / Lexington KY 40512	01/01/0001	12/31/9999	
US	2158 Salsaleto Ct. / Lexington KY 40515	01/01/0001	12/31/9999	

## Address – Create



- To add a new address, you want to be in **Maintain** mode which makes the fields white and editable.
- Use the following steps to enter **Maintain** mode and create an address.
  - ♦ Click on the **Display <-> Change** icon
  - ♦ On the **Address Overview** tab, click **Create**
  - ♦ Enter the **Street**, **City/State/ZIP Code**, and **Country** into the appropriate fields
    - **Country** is a required field and must be completed



Street	2264 Hamodaburg Rd.		
City/State/ZIP Code	Lexington	KY	40503
Country	US		
Time zone			



## Address – Create



- Enter the **Telephone** number including area code, if provided

Telephone	8595551212	Extension	
Mobile Phone		Extension	
Fax		Extension	

- Click on **Continue**

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Print Preview	Contract accounts	Creditworthiness
-------------------------------------	--------------------------	--------------------------	---------------	-------------------	------------------

- Valid From** and **Valid To** dates entered automatically as of the date the address is entered into the system

Address Overview				
Co..	Address Description	Valid From	Valid To	Move
US	5478 Greene Ave. / Lexington KY 40512	01/01/0001	12/31/9999	
US	<del>2158 Salisbury Ct. / Lexington KY 40515</del>	<del>01/01/0001</del>	<del>12/31/9999</del>	
US	2284 Harrodsburg Rd. / Lexington KY 40503	02/22/2011	12/31/9999	

## Address – Move



- Use the following steps to record an address move.
  - First enter the new address into the system
  - Next, click on the **Select** button to the left of the “old” address and click on **Move**

Address Overview				
Co..	Address Description	Valid From	Valid To	Move
US	5478 Greene Ave. / Lexington KY 40512	01/01/0001	12/31/9999	
US	2158 Salisbury Ct. / Lexington KY 40515	01/01/0001	12/31/9999	
US	2284 Harrodsburg Rd. / Lexington KY 40503	02/22/2011	12/31/9999	

- Enter the moving date in the **Date of Move** field

Removal Data	
Address Description	5478 Greene Ave. / Lex
Date of Move	02/22/2011
Move Target Address	



## Address – Move



- To choose the new address, click **Select** to the left of it and click **Choose**

Co.	Address Description	Valid From	Valid To	Move
US	2158 Salsaleto Ct / Lexington KY 40515	01/01/0001	12/31/9999	
US	2264 Harrodsburg Rd / Lexington KY 40503	02/22/2011	12/31/9999	

- When the new address displays in the **Move Target Address** field, click **Continue**

## Address – Move



- The date changes display in the **Address Overview** section

- Click on **Save**

- To return to **Display** mode, click on the **Change/Display** toggle



## Related Persons



- The **Related Persons** tab contains emergency person contact information provided by the student, as well as other related person contact information.
- Note:** The undergraduate application asks for an Emergency Contact person, the relationship to the student, telephone number, and email address.

Relationship Type	Partners	Lega.	Emer.	Start Date	End Date	Address/Description
01 Father is	Daniel Pitt		<input checked="" type="checkbox"/>	01/17/2007	12/31/9999	/
05 Contact is	Art GioDordino		<input type="checkbox"/>	10/23/2009	12/31/9999	/

## Related Persons – Create



- Use the following steps to add a new related person.
- Make sure you are in **Maintain** mode
- Click on **Create With New Related Person**
- Choose the relationship



## Related Persons – Create



- Enter the Contact Information:

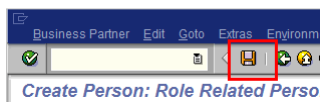
- First Name
- Last Name
- Address
- Country
- Phone Number

- Use the scroll bar on the right side of the screen to view all the fields

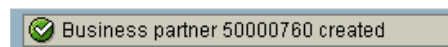
## Related Persons – Create



- When the data has been entered, click on **Save**



- A system message will display



- Click on the **Back** icon



- You will see the new entry on the **Related Persons** tab

Related Persons						
Relationship Type	Partners	Legal	Emer.	Start Date	End Date	Address Description
Contact is	Pitt Daniel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	01/01/2000	12/31/9999	
Contact is	Annabelle Pitt	<input type="checkbox"/>	<input type="checkbox"/>	11/10/2008	12/31/9999	





## Unit 4 Assessment

### SLCM\_AD\_310 Unit 4

Question 1 of 2

To view or edit a student's standard address, use the **Standard Address** tab.

- ☐ True
- ☐ False

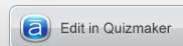
#### PROPERTIES

On passing, 'Finish' button:  
On failing, 'Finish' button:  
Allow user to leave quiz:  
User may view slides after quiz:  
User may attempt quiz:

[Goes to Next Slide](#)  
[Goes to Previous Slide](#)  
[After user has completed quiz](#)  
[At any time](#)  
[Unlimited Times](#)



Properties...



Edit in Quizmaker



## Summary



- Addresses
  - ♦ Standard Address
  - ♦ Address Overview
- Related Persons

## Reminders



- **SECURITY ACCESS NOTE:** Your access may not include access to the IRIS R/3 SLCM transaction screen PIQST00 or some of the transactions on this screen.
  - ♦ Most transactions can be accomplished through the portal, therefore access to this screen may not be needed.
  - ♦ Please check with your ASO, if you feel you need access to this screen.





## Help Websites



- myHelp website:
  - ♦ <http://myHelp.uky.edu/rwd/HTML/index.html>
  - ♦ Contains Quick Reference Cards (QRCs), updated course manuals, and other job aids
- IRIS website
  - ♦ <http://www.uky.edu/IRIS/>
  - ♦ Contains Information Directory, Forms, and other references

## Course Summary



- Understand the difference between Student File and Student Master Data
- Create/activate/inactivate holds
- View progression results
- Create/change student addresses
- Create/change advisor
- Create related person
- View student records via myUK Portal

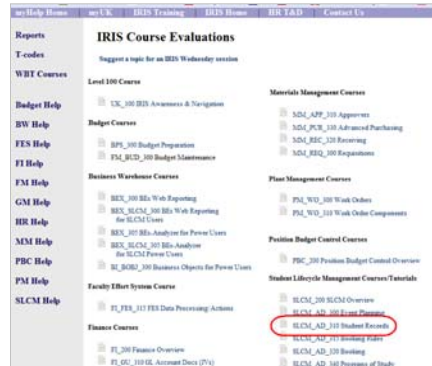




## Course Evaluation



- You can provide IRIS Training with feedback on this course by completing the SLCM\_AD\_310 Student Records course evaluation.
- The evaluation is located at:  
[http://myhelp.uky.edu/rwd/HTML/SLCM/SLCM\\_AD\\_310\\_Evaluation.html](http://myhelp.uky.edu/rwd/HTML/SLCM/SLCM_AD_310_Evaluation.html)



## Course Completion Instructions



- To complete the course, click **Attachments** (upper right corner)
- Click **QRC Course Completion** and print the QRC
  - Note:** The QRC will open in another window.
- Click **OK** to close the **Attachments** window
- Follow the steps in the QRC to complete the course

