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Course Objectives

This course is intended for faculty and staff who serve as an Advisor to students at The University of Akron. This course is intended to illustrate the common tasks an Advisor performs while working with a student in an advising capacity.

In this course, the following topics will be reviewed:

- Advising Self Service
- Add/Update a Student’s Advisor
- Student’s Personal (Biographical) Information
- Service Indicators (Holds)
- Enrollment Summary
- Enrollment Request Inquiry
- Grade Summaries
- Unofficial Transcripts
- Test Results
- Query Viewer
- Operator Defaults
An Advisor may need to perform many other tasks to be effective. Many of these tasks are reviewed in other training materials and/or seminars. Below is a list of other software training that you may want to consider.

✓ **Quick Enroll**: Quick enroll is the process of enrolling a student into classes by using PeopleSoft. For questions related to the Quick Enroll process, contact registrar@uakron.edu. Visit the Software Training Services web page for details on completing this online course. For questions related to training contact psTrain@uakron.edu. Training is required before security is granted.

✓ **Student Program/Plan Changes**: This page is used when you need to change the student's college (program) and/or major (plan) in the PeopleSoft System. Contact information for Program/Plan changes is records@uakron.edu.

✓ **DARS**: (Degree Audit Reporting System) is an automated record reflecting a student's academic progress toward degree completion.
  - **DARS Overview Presentation**: Open to all faculty and staff. Covers how to navigate DARS web, how to run a degree audit, how to read a degree audit, and interpreting the interactive audit. Offered several times each term.
  - **DARS Exception Training**: Access to this training requires department head or dean approval. Offered usually once per term.

  When you have questions about DARS or when you want to find out more about training, email DARS@uakron.edu.

✓ **NOLIJ**: A paperless filing cabinet, NOLIJ allows you to review documents such as applications, transcripts, advising meeting notes, select PeopleSoft data and more. You locate a student through key fields such as student name or ID number. Visit the Software Training Services web page for details on completing this online course.

  For questions about NOLIJ, contact the Support Desk at extension 6888.

**Note**: Security for these processes *may* not be obtained until AFTER the appropriate training.
Lesson 1: Advising Self Service

Discussion

This lesson provides you with the information that you need to navigate and work with the Advising Self Service. There is a great deal of information available to you when using this tool. The student information that you can obtain from the Self Service is as follows:

- Service Indicator Information
- FERPA Data
- Enrollment Dates
- Advisor
- Student Schedule
- Course History
- Exam Schedule
- Grades
- Unofficial Transcripts
- Transfer Credit
- Contact Information
- Demographic Data
- Emergency Contact Information
- Student Groups
- External Course Credits
- Test Credits
- Military Credits
- Program/Plan Data
Introduction to the Advising Self Service

Steps

1. From the menu choose **Self Service > My Advisees**. Your Advisee list will load in alphabetical order.
   
   a. Click the **View Student Details** link to access the Advisee Student Center page (as shown in Step 7).
   
   b. Click the student link to send an email message to the student.

   ![Image of Advising Self Service page]

   **Note**: There may be a slight delay; your Advisee list is loading.

2. If you do not want to work with this list to locate a student record, click on the **VIEW DATA FOR OTHER STUDENTS** button.
Steps

3. A search page displays.

4. Enter the Student’s ID in the **ID** field or use the **Last Name** and **First Name** fields.

5. Click on the **Search** button.

6. If you enter an ID, you will return directly to the **Advisee Student Center** in the Advising Self Service. If you search by name and more than one record met your search criteria, the search results will display.

   If there is a list returned, click on any link for the appropriate student
Steps

7. The Advisee Student Center page displays. On this page, you will see the FERPA indicator, if applicable.
Steps

8. The navigation menu (on the left) allows you to advance to additional pages with information about the student.

Note: If you click on the My Advisees link at any time, you will be returned to the View My Advisee page, you will have lost the data for the student you were previously viewing, and you will need to search for the student again.

9. To return to the search results page to search for a different student, click on the button at the bottom of the page.
**Student Center**

Use the Student Center page, in the Advising Self Service, to obtain the following data:

- Service Indicators
- Enrollment Dates
- Advisor Information
- Student’s Class Schedule
- Student’s Course History
- Student’s Exam Schedule
- Student Grade Report
- Unofficial Transcripts
- Date of Birth
- Social Security Number
- Contact Information (Phone, Email, Address)

---

**Steps**

The Student Center page:

[Image of the Student Center page showing service indicators, enrollments, classes, and contact information]
Steps

1. The **Academics** frame, located at the top left of the page, provides information related to the student’s coursework.

2. Click the **My Class Schedule** link to view the details of the student’s class schedule.
Steps

3. The list of classes the student is enrolled in, including descriptions, displays. The class schedule can be filtered to show enrolled classes, dropped classes and waitlisted classes. Select the filter(s) you wish to apply and then click the filter button.

![](image)

4. To view the textbooks for the courses, click the View/Order Your Textbooks link, located at the bottom of the page.

   If you want to print the schedule, click on the Printer Friendly Page link, located at the bottom of the page.

5. To return to the Student Center page, click on the Cancel button.
6. From the drop down (to the left of This Week’s Schedule), select the option for **Course History** and then click on the **Go** button.
Steps

7. The Course History page displays.
   You can sort the results by using the Sort results by field.

8. Click on the Cancel button to return to the Student Center page.
Steps

9. From the drop down (to the left of This Week’s Schedule), select the option for **Exam Schedule** and then click on the **Go** button.

10. The Exam Schedule page displays.

11. Click on the **Cancel** button to return to the Student Center page.
Steps

12. From the drop down (to the left of This Week’s Schedule), select the option for Grades and then click on the Go button.
13. The grades display for the current semester. To change the term, click the "change term" button.

Josephine Student
2012 Spring | Undergraduate | The University of Akron

IMPORTANT NOTICE REGARDING GRADES:

Interim Grades:
From the end of the third week of the semester through the end of the sixth week, interim grades submitted by instructors are available for viewing for all regular semester (15-week) courses. Interim grades can be updated by instructors throughout this time, allowing you to monitor your progress in your class(es). Interim grades are NOT recorded on your academic record.

Official Grades:
Although grades are available for viewing, they will NOT be posted to your academic transcript until ONE WEEK after final grades are due. When viewing your Cumulative Totals, it is possible that your Cumulative GPA information will change once your grades are posted to your academic transcript and once the Registrar’s Office has finished the end-of-term processing (i.e., adjustments to repeated classes and incomplete grades).

If you have submitted a request for an official transcript, it will be processed after grades have been posted to your academic transcript, ONE WEEK after final grades are due.

### Class Grades - 2012 Spring

<table>
<thead>
<tr>
<th>Class</th>
<th>Description</th>
<th>Units</th>
<th>Grading</th>
<th>Grade</th>
<th>Grade Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>6550 101</td>
<td>Hardware Concepts</td>
<td>3.00</td>
<td>ABC/NC</td>
<td>WD</td>
<td></td>
</tr>
<tr>
<td>7590 101</td>
<td>Intro to Music Theory</td>
<td>2.00</td>
<td>ABC/NC</td>
<td>WD</td>
<td></td>
</tr>
</tbody>
</table>

### Term Statistics - 2012 Spring

- GPA Calculation
- Total Grade Points / Units Taken Toward GPA = GPA

GPA = Total Grade Points / Graded units towards GPA

Printer Friendly Page

Click to obtain Class Details

Term Statistics display.
## Steps

14. Click on the **Cancel** button to return to the Student Center page.

15. From the drop down (to the left of This Week’s Schedule), select the option for **Transcript: View Unofficial** and then click on the **Go** button.
Steps

16. The Unofficial Transcript page displays.
17. In the Academic Institution field, select The University of Akron.
18. In the Report Type field, select the option for Unofficial Academic Record.
19. Click on the View Report button.

Steps

21. Close the window the report displays in.

22. After you close the report window, the Advisee Unofficial Transcript, Previous Requests page displays.

You can view previously run Unofficial Transcripts until they are purged from the system.

23. Click on the **Cancel** button to return to the Transcript page.

24. Click the **Cancel** button to return to the Student Center page.

25. From the drop down (to the left of This Week’s Schedule), select the option for **Transfer Credit: Report** and then click on the **Go** button.
Steps

26. The View Transfer Credit Report page is divided into three areas: Course Credit, Test Credits, and Other Credits.

Course Credits (Provides data from other institutions):

<table>
<thead>
<tr>
<th>Model Nbr</th>
<th>1</th>
<th>Posted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
<td>The University of Akron</td>
<td></td>
</tr>
<tr>
<td>Career</td>
<td>Graduate</td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td>Education Grad nondegree</td>
<td></td>
</tr>
<tr>
<td>Transfer Term</td>
<td>2006 Summer</td>
<td></td>
</tr>
<tr>
<td>Incoming Course</td>
<td>TRANSFER SUMMARY</td>
<td></td>
</tr>
<tr>
<td>Units Taken</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>Grade</td>
<td>T</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Posted</td>
<td></td>
</tr>
<tr>
<td>Equivalent Course</td>
<td>9999 895</td>
<td></td>
</tr>
<tr>
<td>Units</td>
<td>6.00</td>
<td></td>
</tr>
<tr>
<td>Grade</td>
<td>T</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Model Nbr</th>
<th>1</th>
<th>Posted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
<td>The University of Akron</td>
<td></td>
</tr>
<tr>
<td>Career</td>
<td>Undergraduate</td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td>Business Undergraduates</td>
<td></td>
</tr>
<tr>
<td>Plan</td>
<td>Business Administration</td>
<td></td>
</tr>
<tr>
<td>Transfer Term</td>
<td>2006 Spring</td>
<td></td>
</tr>
<tr>
<td>Incoming Course</td>
<td>TRANSFER SUMMARY</td>
<td></td>
</tr>
<tr>
<td>Units Taken</td>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td>Grade</td>
<td>T</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Posted</td>
<td></td>
</tr>
<tr>
<td>Equivalent Course</td>
<td>9999 900</td>
<td></td>
</tr>
<tr>
<td>Units</td>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td>Grade</td>
<td>T</td>
<td></td>
</tr>
</tbody>
</table>

This is where you will find the term-by-term details for processed transfer credit.
Steps

27. **Test Credits** (Provides data such as ACT and CLEP):

This is where you will find the term-by-term test credit and equivalent courses that have been posted to the student's record.

28. **Other Credits** ( Provides data such as PE Credit for Military Duty):

This is where you will find a term-by-term summary of any course credits given to the student based on non-course/non-test activities.

29. Click on the Cancel button to return to the Student Center page.
Steps

30. Under the Academics frame, the **Contact Information** displays. This frame includes basic contact information for the student such as Home Address, Home Phone Number, and UANet Email Address.

31. Click on the **Demographic Data** link.
Steps

32. The Demographic page displays. On this page you will see Date Of Birth, Social Security Number and more.

33. Click on the Cancel button to return to the Student Center page.
**Steps**

34. On the right side of the window, in the blue frames, the following information is available:

- **Holds**: Shows ACTIVE holds (negative service indicators)
- **Enrollment Dates**: Shows the dates on which the student is eligible to register.
- **Advisor**: Shows the Advisor on record for the student

![Diagram of PeopleSoft V9 Campus Advising interface](image)

**Table:**

<table>
<thead>
<tr>
<th>Holds</th>
<th>Enrollment Dates</th>
<th>Advisor</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Holds.</td>
<td>Open Enrollment Dates</td>
<td>Program Advisor</td>
</tr>
<tr>
<td>No To Do's.</td>
<td>Susan McKibben</td>
<td></td>
</tr>
<tr>
<td></td>
<td>330-972-6381</td>
<td></td>
</tr>
</tbody>
</table>
General Info

On the Advisee General Info page in the Advising Self Service, you will be able to obtain the following data:

- Service Indicators (can open the Manage Service Indicator page from here)
- Personal Data (DOB, Marital Status, and more)
- Address Information
- Phone Numbers

Steps

1. Select the Advisee General Info link in the left navigation bar.
2. The **General Info** page displays:

![General Info Page](image)

This page displays many areas of information about the student. At the top of the page, are links to the various sections to which you can advance.

You can either click on a link to advance to that section, or use the scroll bar to move down the page.

When you are reviewing this page, you can use the **Go to top** link in any section to return to the top of the General Info page.
Steps

3. The **Service Indicator** section is at the top of the page.

![Service Indicators](image)

To view additional details about a particular service indicator (hold), click on the link in the **Details** column.

Click on the **edit service indicators** button (security permitting) to open the Maintain Service Indicator page where you can make changes to service indicators.

4. If you scroll down, you will see the section for **Student Groups**.

![Student Groups](image)

This section will list any groups to which the student belongs.
Steps

5. The next section is for **Personal Data**.

Click on the **edit personal data** button to go to the Biographical Information pages for additional personal information.

6. If you scroll down, one of the next sections gives **Addresses**.

This section lists all Address Types and Addresses for the student. To edit an address, click on the **edit addresses** button to open the Addresses pages for changes (security permitting).
Steps

7. The next section gives **Phone** information.

This section lists phone numbers for the student, including the student’s cell phone (Mobile), if The University has the number on record. To edit a phone number, click on the **edit phones** button to open the Phone Numbers page for changes (security permitting).

8. The last section provides **Email Addresses**.

To send an email to an address, click on the link in the **Email Address** column to open a new Outlook email message. To edit an email address, click on the **edit email addresses** button to open the Electronic Addresses page for changes (security permitting).
Transfer Credit Tab

The Transfer Credit page in the Advising Self Service provides the following data:

- Data from other institutions attended
- Test Score Data such as ACT and CLEP
- Data such as PE Credit for Military Duty

Steps

1. Select the Advisee Transfer Credit link in the left navigation bar.
2. The **Transfer Credit** page displays:

### Course Credits

<table>
<thead>
<tr>
<th>Model</th>
<th>Source</th>
<th>Career</th>
<th>Institution</th>
<th>Program</th>
<th>Plan</th>
<th>Articulation Term</th>
<th>Model Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detail</td>
<td>Zippy's School of Higher Learning</td>
<td>Graduate</td>
<td>The University of Akron</td>
<td>Education Graduate</td>
<td>Nondegree</td>
<td>2008 Summer</td>
<td>Posted</td>
</tr>
<tr>
<td>Detail</td>
<td>School of Hard Knocks #1</td>
<td>Undergraduate</td>
<td>The University of Akron</td>
<td>Business Undergraduate</td>
<td>Business Administration</td>
<td>2008 Spring</td>
<td>Posted</td>
</tr>
</tbody>
</table>

### Test Credits

<table>
<thead>
<tr>
<th>Model</th>
<th>Source</th>
<th>Career</th>
<th>Institution</th>
<th>Program</th>
<th>Plan</th>
<th>Articulation Term</th>
<th>Model Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detail</td>
<td>Undergrad</td>
<td>The University of Akron</td>
<td>Business Undergraduates</td>
<td>CBA - Restricted</td>
<td>2007 Fall</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Detail</td>
<td>Undergrad</td>
<td>The University of Akron</td>
<td>Business Undergraduates</td>
<td>CBA - Restricted</td>
<td>2008 Spring</td>
<td>Posted</td>
<td></td>
</tr>
<tr>
<td>Detail</td>
<td>Undergrad</td>
<td>The University of Akron</td>
<td>Business Undergraduates</td>
<td>CBA - Restricted</td>
<td>2008 Summer</td>
<td>Posted</td>
<td></td>
</tr>
<tr>
<td>Detail</td>
<td>Undergrad</td>
<td>The University of Akron</td>
<td>Business Undergraduates</td>
<td>Business Administration</td>
<td>2008 Summer</td>
<td>Posted</td>
<td></td>
</tr>
<tr>
<td>Detail</td>
<td>Undergrad</td>
<td>The University of Akron</td>
<td>Education Undergraduate</td>
<td>2008 Summer</td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Other Credits

<table>
<thead>
<tr>
<th>Model</th>
<th>Source</th>
<th>Career</th>
<th>Institution</th>
<th>Program</th>
<th>Plan</th>
<th>Articulation Term</th>
<th>Model Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detail</td>
<td>Graduate</td>
<td>The University of Akron</td>
<td>Education Graduate</td>
<td>2008 Summer</td>
<td>Posted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detail</td>
<td>Undergrad</td>
<td>The University of Akron</td>
<td>Business Undergraduates</td>
<td>Business Administration</td>
<td>2008 Summer</td>
<td>Posted</td>
<td></td>
</tr>
</tbody>
</table>
Steps

3. This page displays three main sections: Course Credits, Test Credits, and Other Credits. Running the Transfer Credit Report on the Student Center tab elicits the same information.

Course Credits provides data from other institutions. This section will display transfer credit detail that has been entered for the student, either Posted or Complete.

For additional information, click on the Statistics tab.

The Statistics tab displays:

This detail shows you the number of Units Transferred.

For additional information, such as equivalent course information, click on the Detail link for the course.

Click on the Model tab to return.
Steps

4. The **Test Credits** section displays next. This section provides data such as ACT and CLEP scores.

For additional information, such as equivalent courses, click on the respective **Detail** link.

Click on the **Statistics** tab for additional information.

The **Statistics** tab displays:

<table>
<thead>
<tr>
<th>Model</th>
<th>Statistics</th>
<th>Detail</th>
<th>Career</th>
<th>Units Transferred</th>
<th>GPA</th>
<th>GPA</th>
<th>GPA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Undergrad</td>
<td>Undergrad</td>
<td>Business Undergraduates</td>
<td>CBA - Restricted</td>
<td>2007 Fall</td>
<td>Complete</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Undergrad</td>
<td>Undergrad</td>
<td>Business Undergraduates</td>
<td>CBA - Restricted</td>
<td>2008 Spring</td>
<td>Posted</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Undergrad</td>
<td>Undergrad</td>
<td>Business Undergraduates</td>
<td>CBA - Restricted</td>
<td>2008 Summer</td>
<td>Posted</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Undergrad</td>
<td>Undergrad</td>
<td>Business Administration</td>
<td>Education Undergraduate</td>
<td>2008 Summer</td>
<td>Complete</td>
</tr>
</tbody>
</table>

Click on the **Detail** link in the Detail column for additional information about the Test Credit.

Click on the **Model** tab to return.
Steps

5. The last section displayed is the **Other Credits** section. This section provides data such as PE Credit for Military Duty.
Academics

The Academics page in the Advising Self Service provides the following data:

- The Student’s Program/Plan Information
- A link to the Program/Plan pages to make changes
- The Student’s Enrollment Eligibility
- The Student’s classes, by term
- Direct navigation to Quick Enroll from the Classes section
- Cumulative and term statistics by term

Steps

1. Select the Advisee Academics link in the left navigation bar.
Steps

2. This page is divided into two main sections Institution/Career/Program and Term Summary.

The Institution/Career/Program section:

This section provides the Student's Program/Plan information.

To make a change to the Student's Program/Plan (security permitting), click on the edit program data button. The Student Program/Plan pages will display.
3. The **Term Summary** section displays at the bottom of the page.

This section displays Term Activation, Academic Standing, Level/Load, Class Enrollments, and Term Units and GPA information.

Click on any term link on the left side. The student’s data for that term appears on the right.

The Classes section contains a list of classes for the term selected. A green checkmark indicates enrolled classes, a blue “x” indicates dropped classes, and yellow triangle indicates wait listed classes. A link for Quick Enrollment appears (security permitting).
Note: Notify Button

The Notify button appears on several pages that you use while advising students. Using this button allows you to send an email message to another PeopleSoft User who may need to see the information you are sending. The User MUST have security access to the page to utilize the link you are sending. When you click on this button, the following page displays:

To use this page, enter information in the Notification Details frame. After you complete the form, click on the OK button to send the message.
The User will get an Outlook Email message with the information from the form. The link in the message will be a link to the same page from which you clicked the Notify button. If the user is already logged into PeopleSoft, the link will go directly to the page. If the user is not logged in to PeopleSoft, he/she will need to log into the system.

The Email message will appear similar to the following:

```
Workflow Notification
Priority:
Date Sent: 2008-11-18
Sent To: wsara
cc:

Please click on the link below to access this transaction:

Message Text:
This is a test.
```
Lesson 2: Assign an Advisor or Advising Committee

Use this procedure to assign a Student Advisor or Advising Committee.

**Note:** You can identify the student’s Advisor in the Advising Self Service on the Student Center tab on the right side of the page.

**Add or Change an Advisor/Advising Committee**

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From the menu choose <strong>Records and Enrollment &gt; Student Background Information &gt; Student Advisor</strong>.</td>
</tr>
<tr>
<td>2. The Student Advisor Search page displays.</td>
</tr>
<tr>
<td>3. Enter the student’s EmplID or Last Name and First Name.</td>
</tr>
<tr>
<td>4. Mark the <strong>Include History</strong> checkbox.</td>
</tr>
<tr>
<td>5. Click on <strong>Search</strong></td>
</tr>
</tbody>
</table>
**Steps**

6. If you enter an ID, you will return directly to the Student Advisor page. If you search by name and more than one record meets your search criteria, search results will display.

   If there is a list returned, click on any link for the appropriate student.

   Review the current row for the student.

**NO ADVISOR ASSIGNED:** The following is an example of a student who does not have an Advisor assigned – note the “1 of 1” in the outer frame (to the right of the Academic Institution) and “1 of 1” in the inner frame with no data specified for the advisor (all fields blank except for the Advisor Role).
Steps

ADVISOR ASSIGNED:

7. The following is an example of a student that **DOES** have an Advisor assigned.

   Note the “1 of 1” in the outer frame and “1 of 1” in the inner frame - with the advisor information **completed**.
Steps

**ADVISOR AND COMMITTEE(S) ASSIGNED:**

8. The following is an example of a student who has had changes made to the Advisor – as indicated by “1 of 4” in the outer frame. For the current effective date, the student has 3 advisors/advising committees assigned as indicated by “1 of 3” in the inner frame.

9. Optional: Click the **View All** link in the inner frame to see the current advisor and/or Advising Committee assignments.

![Image of advisor and committee assignment]

Multiple Advisors and/or Advising Committees can be assigned to a student for an effective date. In the above example, the student is assigned to an Advisor and two Advising Committees.
10. If the student **DOES** currently have an Advisor or Advising Committee assigned, click on the **Add a Row** button in the outer frame (to the right of the Academic Institution field) to add or change the advisor.

If the student does **not** have an advisor assigned, as indicated by all the advising fields being blank, continue on to the Step 15 to add an Advisor (or Advising Committee) to the Student’s record.
Steps

11. The new effective dated row is added, with the current date as the default Effective date. Note that the rows for the previously assigned Advisor(s) and/or Advising Committee are copied to the new effective date.

12. Click on the Add a Row button in the inner frame to add a blank row in which to add a new Advisor.

13. A new, blank row is added. Note the advising fields are all blank.
Steps

14. The process is to:
   a. Enter the new Advisor in the blank row
   b. Delete any rows for Advisors/Advising Committees that are no longer valid.

15. If the Advisor change is not effective until a future term, enter the date of the first day of the effective term.

   In the Academic Career field, use the Lookup button to select Undergraduate, Graduate or Law.

   In the Academic Program field, use the Lookup button to locate the student’s Program.

   In the Academic Plan field, use the Lookup button to locate the student’s Plan.

   In the Academic Advisor field, enter the Advisor’s ID number. If you do not know the ID, use the Lookup button to return a search page where you can search by Last and First Name.

   If advised by a committee, leave the Academic Advisor field blank and select the Advised by Committee checkbox. Then, in the Committee field, use the Lookup button to locate the Advising Committee.
Steps

16. Optional: If there are any additional changes, such as a second Advisor or Advising Committee, click the Add a Row button in the inner frame to add another advisor record for the effective date.

![Image of PeopleSoft V9 Campus Advising interface]

**NOTE:** The Advisor Number is a sequential number assigned by PeopleSoft to each Advisor row. There is no significance to this number for advising purposes. It is not possible to designate a primary advisor.

17. Click the View All link in order to view all the Advisors assigned for the effective date.
Steps

18. Review the Advisors assigned for the Effective Date. If necessary, delete any rows for Advisors/Advising Committee that are no longer valid for the effective date by clicking the Delete button for the row.

NEVER delete any records for a past effective date – doing so will remove the history. Only records copied over to a new effective date should be deleted if they are no longer valid.

19. Click on the Save button. Saved appears in the top right area of the page to indicate that the changes have been saved.
Lesson 3: Code “Student Advisor” Panel for NSO

The following lesson provides details for advisors who need to code the “Student Advisor” panel for New Student Orientation.

**Steps**

1. From the menu choose Records and Enrollment > Student Background Information > Student Advisor.

2. The Student Advisor Search page displays.

3. Enter the student’s EmplID or Last Name and First Name.

4. Mark the Include History and Correct History checkboxes.

5. Click on Search
Steps

6. Verify you are on the “Advisor Number: 1” row.

7. Uncheck the Advised by Committee checkbox, which will also automatically remove the “AAC” in the Committee field.

Greased out to indicate you are in “Correct History” mode
Steps

8. Enter your individual Advisor Code in the **Academic Advisor** field. Press the TAB key and your name will appear to the right of the code.

9. Click the Add a Row button in the inner frame to add another advising record.
**Steps**

10. A new, blank row is added. The row should read “Advisor Number:2”

11. Click the Lookup button next to **Academic Career**, **Academic Program** and **Academic Plan** to assign each of the codes.

12. Check the **Advised by Committee** checkbox and type “AAC” in the **Committee** field. The Academic Advisor field should be left blank. Note: Hit the TAB key after typing “AAC” in the Committee field and the committee name will appear to the right of the code.

13. Click **Save**
**Finished Product**

Once complete, there should be two advisor records for the student:

**Row 1/Advisor Number 1:**

![Image of advisor record number 1]

**Row 2/Advisor Number 2:**

![Image of advisor record number 2]
Lesson 4: Biographical Information

This section provides you with basic personal information about the student. Most of this information can also be found in the Advising Self Service detailed in Lesson 1.

Some of the information found in this location:

- Date of Birth
- Marital Status
- Gender
- Social Security Number
- Address
- Phone Numbers
- E-mail Addresses

Steps

1. From the menu choose Campus Community > Personal Information (Student) > Add/Update a Person

2. The Search page displays.

3. Enter the Student’s ID in the Empl ID field or use the Last Name and First Name fields.

4. Click the Include History checkbox.

![Search Criteria Image]
Steps

5. Click on the **Search** button.

6. If you enter an ID, you will return directly to the Biographical Details page. If you search by name and more than one record met your search criteria, the search results will display.

   If there is a list returned, click on any link for the appropriate student.

7. The **Biographical Details** page displays:

   ![Biographical Details page](image)

   On this page, is information such as Negative and Positive Service Indicators, FERPA indicator, Date of Birth, Marital Status, Gender, Social Security Number, Addresses, Phone Numbers, Email Addresses, and more.
## Steps

8. Click on the **Addresses** tab.

9. Click the **Edit/View Address Detail** links to view history.

### Use the View tools to locate additional rows of data.

On this page, is information such as Current Addresses. This page also allows you to make changes to addresses. See Appendix A for more on Address Changes.

10. To return to the Search page to search for another student, click on the **Return to Search** button.

To move to the next or previous student in the search results, click on the ![prev](#) **Previous in List** ![next](#) **Next in List** buttons respectively.
Lesson 5: Service Indicators

Service Indicators can be assigned to students manually or by batch process. When assigning a Service Indicator, the corresponding positive 🌟 or negative ⚠️ Service Indicator button will display on most pages in the system regarding that individual. Click on the Service Indicator button to view which services or restrictions apply. Only one of each button will show on a page, regardless of how many indicators have been applied to the record.

Service Indicators become effective for the term noted and remain in effect for that term and all subsequent terms until the service indicator is removed. You can manually remove a Service Indicator from an individual’s record when it no longer applies; however, it is not common practice to remove service indicators that you did not apply.

Some of the Service Indicators that you may see, as an Advisor, are:

- **Advising Holds** – if a student has moved from Summit to UC or the student is under an academic contract
- **Transfer to Degree-Granting College*** – applied by UC Dean’s Office
- **Gen Ed Requirement Not Met*** – applied by UC Dean’s Office
- **Pending Final Transcript** – applied by Admissions – do not touch
- **Undergraduate Provisional** – applied by Admissions and used by Summit College
- **University College Learning Community** – applied by UC Dean’s Office – can be moved to allow for enrollment, but cannot be removed

*Generally, Advisors move these holds to allow students to enroll in classes after discussing progress to degree with the student. Advisors should remove both holds when the student has met the Gen Ed Requirements and/or been transferred to the degree granting college.
Service Indicator Inquiry

The Negative Service Indicator, Positive Service Indicator and FERPA buttons appear in the same location on most pages in PeopleSoft. At The University of Akron, Service Indicators sometimes are referred to as HOLDS. These buttons display only if they are applicable to the open record.

| Negative Service Indicator | A negative service indicator displays when services are being restricted. Only one icon will display, regardless of how many restrictions have been placed on the record. An example of a negative service indicator would be a student cannot register for courses. Click on the button for more information. |
| Positive Service Indicator | A positive service indicator displays when there are special privileges available for a student. Only one icon will display, regardless of how many privileges are applicable. An example of a positive service indicator would be that a student can register early. Click on the button for more information. |

You can also navigate to the Manage Service Indicators page to view all Indicators on a record.

Steps

1. From the menu choose, Campus Community > Service Indicators (Student) > Manage Service Indicators.
2. The Search page displays.
3. Enter the Student’s ID in the Empl ID field or use the Last Name and First Name fields.
Steps

4. Click on the **Search** button.

5. If you entered an ID, you will return directly to the Manage Service Indicators page. If you search by name and more than one record met your search criteria, the search results display.

6. If there is a list returned, click on any link for the appropriate student.

7. The **Manage Service Indicators** page displays. In this example, one service indicator exists for the student.

8. Click the link in the **Code** column for additional details regarding the service indicator.
Steps

9. Additional details display, such as the person placing the hold and services impacted.

10. Click the **OK** button to return to the previous screen.
Assigning Service Indicators

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From the menu choose, Campus Community &gt; Service Indicators (Student) &gt; Manage Service Indicators</td>
</tr>
<tr>
<td>2. The Search page displays.</td>
</tr>
<tr>
<td>3. Enter the Student’s ID in the <strong>Empl ID</strong> field or use the <strong>Last Name</strong> and <strong>First Name</strong> fields.</td>
</tr>
<tr>
<td>4. Click on the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>5. If you enter an ID, you will return directly to the Manage Service Indicators page. If you search by name and more than one record met your search criteria, the search results display. If there is a list returned, click on any link for the appropriate student.</td>
</tr>
</tbody>
</table>
### Steps

6. The **Manage Service Indicators** page displays. In this example, no service indicators exist for the student.

7. Click on either of the [Add Service Indicator](#) links or the Add Service Indicator tool to add a new Service Indicator.

![Manage Service Indicators](image)
Steps

11. A new service indicator is created. By default, your EmplID and name will be entered in the **Placed Person ID** and **Placed by** fields.

![Image of a service indicator form]

- (**Institution:** The University of Akron)
- (**Service Indicator Code:** )
- (**Service Ind Reason Code:** )
- (**Description:** )

**Effect:**
- (**Effective Period:**
  - **Start Term:***
  - **Start Date:**
  - **End Term:***
  - **End Date:**

**Assignment Details**
- (**Department:** )
- (**Reference:** )
- (**Amount:** 0.00)
- (**Currency:** USD)

**Contact Information**
- (**Contact ID:** )
- (**Contact Person:** )
- (**Placed Person ID:** 13944)
- (**Placed By:** McKibben, Susan M)

**Comments**

**Services Impacted**
- (**Service Indicator Date Time:** 01/21/2015 9:41:04AM)
- (**User ID:** AC624SF)
- (**McKibben, Susan M**}

[OK] [Cancel] [Apply]
### Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Select the <strong>Service Indicator Code</strong>. Enter the Service Indicator Code. To select a Service Indicator Code from the Lookup List, click 🖼 to the right of the field. You will see the codes that you have security access to choose.</td>
</tr>
<tr>
<td>13.</td>
<td>Select <strong>Service Ind Reason Code</strong>. Enter the Reason Code. To select a Service Indicator Reason Code from the Lookup List, click 🖼 to the right of the field.</td>
</tr>
<tr>
<td>14.</td>
<td>Select <strong>Start Term</strong>. To select a Term from the Lookup List, click 🖼 to the right of the field. A list of values for the terms is displayed. <strong>Note:</strong> If enrollment should be blocked for a future term, enter that Term code.</td>
</tr>
<tr>
<td>15.</td>
<td>Select <strong>Start Date</strong>. This is the date the Service Indicator becomes active. To select a Start Date, click 🖼 to the right of the field. Select a date from the calendar. <strong>Note:</strong> <strong>Start Term</strong> and <strong>Start Date</strong> are minimum requirements.</td>
</tr>
<tr>
<td>16.</td>
<td><strong>Comments.</strong> Enter any additional notes about the Service Indicator in the Comments field. <strong>Note:</strong> This information is available to all who view Service Indicators.</td>
</tr>
<tr>
<td>17.</td>
<td><strong>OPTIONAL:</strong> Select an <strong>End Term</strong> and <strong>End Date</strong>. To select an End Term from the Lookup List, click 🖼 to the right of the field. On the Lookup Term page, click 🖼. A list of values for the terms is displayed. To select an End Date, click 🖼 to the right of the field. Select a date from the calendar.</td>
</tr>
</tbody>
</table>
Steps

18. Click on the **Apply** button to remain on this page. (OK returns to the list of Service Indicators on the Manage Service Indicators page.)

*Saved* appears temporarily in the top right area of the page.

19. Click on the **OK** button to return to the list of service indicators.
Removing Service Indicators

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From the menu choose Campus Community &gt; Service Indicators (Student) &gt; Manage Service Indicators</td>
</tr>
<tr>
<td>2. The Search page displays.</td>
</tr>
<tr>
<td>3. Enter the Student’s ID in the Empl ID field or use the Last Name and First Name fields.</td>
</tr>
<tr>
<td>4. Click on the Search button.</td>
</tr>
<tr>
<td>5. If you enter an ID, you will return directly to the Manage Service Indicators page. If you search by name and more than one record met your search criteria, the search results will display.</td>
</tr>
<tr>
<td>6. If there is a list returned, click on any link for the appropriate student.</td>
</tr>
</tbody>
</table>
Steps

7. The Manager Service Indicators page displays. Select the link in the Code column for the Service Indicator that you need to delete.
8. The Service Indicator details display. Click the **Release** button to remove the service indicator.

The Release button only appears if you have security to remove.
### Steps

9. Select the **OK** button to Release and Save.

   -OR-

   Select **Cancel** to go back *without* Releasing the Service Indicator.
Audit Service Indicators

There may be occasions when you need to view the Service Indicator history. For example, once a service indicator is removed, the only way to view the details of that service indicator is to navigate to the Service Indicator Audit page.

Steps

1. From the menu choose Campus Community > Service Indicators (Student) > Audit Service Indicators

2. The Search page displays.

3. Enter the Student’s ID in the ID field.

4. Click on the Search button.
Steps

5. The search results will display.

6. Review the **Action Code** column to determine the type of action. The **Action Code** values are:
   - **A** = Add
   - **C** = Change
   - **D** = Delete

7. Click on any field in a row to view the details for the Service Indicator.
Steps

8. The Service Indicator details display. In this example, you can view the **User ID** and **Name** of the individual who removed the Advising hold service indicator, along with other details regarding the hold.

![Service Indicator Audit](image)

9. Click the **Cancel** button to return to the previous page.
Lesson 6: Enrollment Summary (Student Schedule)

The Enrollment Summary page displays the courses a student is enrolled in for a given term. The Enrollment Summary page also allows the student’s schedule to be printed in a report format with a more formal appearance.

Steps

1. Navigate using the following path:
   Records and Enrollment> Enrollment Summaries> Enrollment Summary

2. The Search page displays.

3. Enter the student’s ID.

4. In the Academic Career field, use the drop down to select the option for Undergraduate or whatever career fits your needs.
Steps

5. The Term field can be used to narrow your search. You can use the **Lookup Term** button to return a list of valid values.

The Term is composed of four digits:

**First Digit**: Century; for “2000’s” this will be “4”; “1900’s” would be “3”

**Second and Third Digit**: Last two digits of year

**Fourth Digit**: Term. Fall= 7, Spring= 1, and Summer= 3

Example:

4087 2008 Fall  2008 Fall

**Note**: You will see the **Lookup** button next to several fields in PeopleSoft. Click on this button to open a page that allows you to search for predefined values that you can select for the field.
Steps

6. Click on the **Search** button.

7. Review the search results to locate the desired term, if the term was not specified. Click on any link for the row you wish to view.
Steps

8. The courses for the term are listed. In this example, courses 1 through 3 of a total of 8 courses are displayed, as indicated by “1-3 or 8”.

9. Click the View All link to view all the courses for the term on one page.
Steps

10. All 8 of the courses are now displayed on the page.

11. To process the report, click the **Print Study List** link.

12. You may notice the word “Saved” appears in the upper right of the screen to indicate the report process has been initiated.

13. Click the **Report Manager** link to view the report.

![Enrollment Summary](image)
Steps

14. The **Administration** tab displays.

15. This page does not refresh automatically. To view and print the report, the report status must be **Posted**.

16. Click the **Refresh** button to update the status. It may be necessary to click the **Refresh** button more than one time.

17. When the status is **Posted**, click the link for the report in the **Description** column ("Individual Student Study Rpt") to view the report.


19. Close the report window when you are finished with the Enrollment Summary Report.
Lesson 7: Enrollment Request

The Enrollment Request Inquiry will allow you to view enrollment actions, overrides, changes in grading basis and other information pertaining to classes a student has taken.

**Steps**

1. Navigate using the following path:
   
   Records and Enrollment > Enroll Students > Enrollment Request Search

2. The Enrollment Request – Find an Existing Value page displays.

3. Select AKRON as the Academic Institution.

4. Click Search.
Steps

5. The Enrollment Request Search page displays. Select the **Academic Career** from the drop-down.

6. Either enter the **Term** or use the lookup button to select the term.

7. Enter the **Empl ID** of the student.

8. Enter data in any of the fields on the page to narrow the results. The more data entered, the narrower the search will become. The following fields are most helpful in your search: Term, User ID, Empl ID (student’s) and Class Nbr.

9. Note: Leave User ID blank to get all enrollment actions for a student.

10. Click **Search**.
Steps

11. The Enrollment List frame at the bottom of the page is populated based on your search criteria.

12. Click the **Fields** folder tabs to view additional information about each enrollment request action.

13. Click the **Expand** icon to view all the fields on one page.

14. Use the View tools to view additional rows of data.
Lesson 8: Student Grades (By Term)

The Student Grade Inquiry page displays the grades a student earned for a specific term. The Student Grade Inquiry page allows the student schedule to be printed in a report format and a more formal appearance. You can also access the student’s Term Statistics from this navigation.

Steps

1. Navigate using the following path:
   Records and Enrollment> Student Term Information> Student Grades

2. The Search page displays.

3. Enter the student’s ID.

4. In the Academic Career field, use the drop down to select the option for Undergraduate or whatever Career fits your needs.
### Steps

5. The Term field can be used to narrow down the search. You can use the **Lookup Term** button to return a list of valid values.

<table>
<thead>
<tr>
<th>Term Description</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008 Fall</td>
<td>2008 Fall</td>
</tr>
<tr>
<td>2008 Summer</td>
<td>2008 Summer</td>
</tr>
<tr>
<td>2008 Spring</td>
<td>2008 Spring</td>
</tr>
<tr>
<td>2009 Fall</td>
<td>2009 Fall</td>
</tr>
<tr>
<td>2009 Summer</td>
<td>2009 Summer</td>
</tr>
<tr>
<td>2009 Spring</td>
<td>2009 Spring</td>
</tr>
<tr>
<td>2010 Fall</td>
<td>2010 Fall</td>
</tr>
<tr>
<td>2010 Summer</td>
<td>2010 Summer</td>
</tr>
<tr>
<td>2010 Spring</td>
<td>2010 Spring</td>
</tr>
</tbody>
</table>

The Term is composed of four digits:
- **First Digit**: Century; for “2000’s” this will be “4”, “1900’s” would be “3”
- **Second and Third Digit**: Last two digits of year
- **Fourth Digit**: Term. Fall= 7, Spring= 1, and Summer= 3

**Example:**

| 4087 2008 Fall | 2008 Fall |

6. Click on the **Search** button.

7. If you did not enter an ID and term the search results will display. Select the link for the appropriate student and term.
Steps

8. The grades for the term display.

9. Use the **Next in List** and **Previous in List** buttons to move throughout the search results.

10. Click the **Term Statistics** tab or link to get To-Date statistics for the student.
Steps

11. The Term Statistics page displays.

12. Click either the **Student Grade Inquiry** tab or link to return to the previous page.
Steps

13. The Student Grade Inquiry page displays. Click the **Print** button to submit the grades report.

14. Click the **Report Manager** link to view the report.
Steps

15. The **Administration** tab displays.

16. This page does not refresh automatically. To view and print the report, the report status must be **Posted**.

17. Click the **Refresh** button to update the status. It may be necessary to click the **Refresh** button more than one time.

18. When the status is **Posted**, click the link for the report in the **Description** column (“Grade Report”) to view the report.
Steps

Lesson 9: Unofficial Transcripts

Use this procedure to view and print Unofficial (UNOFF) transcripts.

When accessing the Transcript Request component, click the Add a New Value link to create a new request. If you search for the transcript using the Transcript Request – Find an Existing Value page, you will be viewing a dated transcript.

You also have access to Unofficial Transcripts via the Advising Self Service.

View a Transcript

Steps

1. Navigate using the following path: Records and Enrollment > Transcripts > Transcript Request

2. The Transcript Request – Find an Existing Value page is displayed. Enter criteria to access a previously run transcript for a student. To run an up-to-date transcript, continue to step 3.

3. Click on the Add a New Value link or the Add a New Value tab.
Steps

4. The Request Header page appears.

5. For **Institution**, select or type **AKRON**

6. Click the down arrow at **Transcript Type** and select **UNOFF**.

7. Select **Output Destination**: Select Page or Printer.

   **Note:** Selecting **Printer** will produce the copies within Adobe Acrobat.
### Steps

8. Click on the **Request Detail** folder tab. The Request Detail page is displayed.

9. Enter the Student’s EmplID in the ID field or click the Lookup icon and search for the student by Last Name and First Name.

10. **Optional:** To run more than one transcript at a time, click the **Add a Row button** and repeat step 9.  

   **Note:** If you continue to use the **+** on the last row added, the transcripts will be printed in alphabetical order from the Request Detail page.

   To delete a row, place the cursor in that row and click on that row’s Delete a Row button **−**. At the prompt, confirm the deletion by clicking on **OK**.

20. Click the **Save** button.

11. Click on the **Process Request** button.

   The system processes the transcript request, and after a few minutes, moves you to the **Report Results** page where you can view the transcript(s).
Steps

12. The **Report Results** page is for **viewing** the transcript. The Print button on this page does **NOT** print the transcript.

13. To print the transcript, click the **Request Detail** tab.
Steps

14. The Request Detail page displays. Click the **Print** button to print the transcript. This submits the report for printing.

15. Click the **Report Manager** link.
16. The Administration page of the Report Manager is displayed. The report is titled “Transcript Print All”.

17. This page does not refresh automatically. To view and print the report, the report status must be Posted.

18. Click the Refresh button to update the status. It may be necessary to click the Refresh button more than one time.

19. When the status is Posted, click the link for the report in the Description column (“Transcript Print All”) to view the report.
Steps

21. In the Transcript Request window, click the **Go Back to Transcript Request** link to return to the Transcript Request page.
Lesson 10: Program/Plan Changes

Update a Student’s Plan

When a change is made to a student’s plan, the student’s Program/Plan page is updated in PeopleSoft. Use the following procedure to change a student’s Program/Plan.

Steps

1. Choose from the menu Records and Enrollment > Career and Program Information > Student Program/Plan.

2. The Search page displays.

3. Enter the Student’s ID in the ID field or use the Last Name and First Name fields.

4. Check the Include History checkbox. NOTE: The Include History box MUST be checked in order to obtain the history of the student’s Program/Plan.

5. Click on the Search button.

6. If you enter an ID, you will return directly to the Student Program page. If you search by name and more than one record met your search criteria, the search results will display.

   If there is a list returned, click on any link for the appropriate student.
Steps

7. The Student Program page displays. Check the student’s Academic Career and Academic Program to ensure you are on the correct record.

8. Check the Program Action to ensure you are able to make changes to this record.

Note: Do NOT make any changes if the current Program Action row has an action of:
- Completion
- Discontinuation
- Dismissal
- Leave of Absence
- Suspension
- Administrative Withdrawal
- Data Change (Applied for Graduation, Reinstated for Graduation, or Hold-Over for Graduation)

9. Click on the Student Plan tab or use the hyperlink at the bottom of the page.
Steps

10. The **Student Plan** page displays. Check the **Academic Plan** to ensure a change is required.

11. Return to the **Student Program** page by clicking on the **Student Program** tab or use the hyperlink at the bottom of the page.
Steps

12. The **Student Program** page is displayed.

13. Click the Add a Row button.
Steps

14. A new row is added with today’s date in the **Effective Date** field.

15. Either type the *Program Action* of PLNC (Plan Change) or use the Lookup icon and select PLNC.

16. Select an **Action Reason**:
   - **MAJ** (Change of Major): Used to identify changes i.e., from Biology to English
   - **ADV** (Advising Plan Change): Used to identify changes such as track changes i.e., from CJ-Corrections to CJ-Law Enforcement

17. If necessary, enter the term that this change is to go into effect in the **Admit Term**.
   
   **NOTE:** *This step is a degree-granting college step.*

18. Either click the **Student Plan** tab or use the hyperlink at the bottom of the page.
Steps

19. The **Student Plan** page displays. The plan information is copied from the previous row.

20. Select the **Academic Plan** number that currently displays and delete the existing number. Then, either enter the student’s new **Academic Plan** code or use the Lookup icon to search and select the Academic Plan number.

21. The **Requirement Term** is carried over from the previous row. Verify the term is correct, and change as needed.

   **NOTE:** The **Requirement Term** is attached to the student’s catalog term. If a change is necessary, enter the correct term in the field or use the Lookup icon to search for and select the **Requirement Term**.

22. Click the **Save** button.
Lesson 11: Intercollege Transfers (ICT) in Progress

When a student has applied for an ICT, there is a short period of time where the student’s file is in-between colleges before the receiving college approves the ICT and the student’s program/plan is updated. To assist in identifying these students, a new process has been developed where the student’s program/plan is updated to reflect that an ICT is in progress.

Part 1: Add an “ICT in Progress” row

The student’s home (original) college will add the ICT row.

Steps

1. Choose from the menu Records and Enrollment > Career and Program Information > Student Program/Plan.

2. The Search page displays.

3. Enter the Student’s ID in the ID field or use the Last Name and First Name fields.

4. Check the Include History checkbox. **NOTE:** The Include History box MUST be checked in order to obtain the history of the student’s Program/Plan.

5. Click on the Search button.

6. If you enter an ID, you will return directly to the Student Program page. If you search by name and more than one record met your search criteria, the search results will display.
Steps

If there is a list returned, click on any link for the appropriate student.

7. The **Student Program** page displays. The **Status must** be “Active in Program”.

8. Click the Add a Row button.
Steps

9. A new row is added with today’s date as the **Effective Date**.

10. Enter the **Program Action** of **DATA** (Data Change).

11. Enter the **Action Reason** of **ICT** (ICT In progress).

12. The completed row should look as follows:

![Image of completed row](image)

13. Either click the **Student Plan** tab or click the link at the bottom of the page.
Steps

14. The **Student Plan** page displays.

15. Enter the **Academic Plan** or select the Academic Plan from the Lookup list.

**NOTE:** It is ok for there to be a mismatch of the student’s program and plan for an ICT in progress. This allows for someone reviewing the record to know that the student is still in one college but hopes to ICT to another college as indicated by the plan number entered.

16. Click the **Save** button.
Step 2: If ICT was approved by the receiving college – Add the ICT row

The receiving (accepting) college will add the ICT row.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Choose from the menu Records and Enrollment &gt; Career and Program Information &gt; Student Program/Plan.</td>
</tr>
<tr>
<td>2. The Search page displays.</td>
</tr>
<tr>
<td>3. Enter the Student’s ID in the ID field or use the Last Name and First Name fields.</td>
</tr>
<tr>
<td>4. Check the Include History checkbox. NOTE: The Include History box MUST be checked in order to obtain the history of the student’s Program/Plan.</td>
</tr>
<tr>
<td>5. Click on the Search button.</td>
</tr>
<tr>
<td>6. If you enter an ID, you will return directly to the Student Program page. If you search by name and more than one record met your search criteria, the search results will display.</td>
</tr>
</tbody>
</table>

   If there is a list returned, click on any link for the appropriate student.
Steps

7. The **Student Program** page displays. The **Status** *must* be “Active in Program”.

8. Click the Add a Row [+] button.
**Steps**

9. A new row is added with today’s date as the **Effective Date**.

10. Enter the **Program Action** of PRGC (Program Change).

11. Enter the **Action Reason** of ICT (Intercollege Transfer).

12. Enter the **Academic Program** (college) to which the student is transferring.

13. Select the **Admit Term**.

14. Select the **Requirement Term**.

15. The completed row should look as follows:

![Image of completed row]

16. Either click the **Student Plan** tab or click the link at the bottom of the page.
Steps

17. The Student Plan page displays.

18. Enter the Academic Plan or select the Academic Plan from the Lookup list.

19. Select the Requirement Term, if needed.

20. Click the Save button.
Part 3: If ICT was denied – Add ICT row

When the receiving (accepting) college denies the ICT, they should contact the student’s home (original) college. The student’s home (original) college will add the Rescind ICT In Progress row.

Steps

1. Choose from the menu Records and Enrollment > Career and Program Information > Student Program/Plan.

2. The Search page displays.

3. Enter the Student’s ID in the ID field or use the Last Name and First Name fields.

4. Check the Include History checkbox. NOTE: The Include History box MUST be checked in order to obtain the history of the student’s Program/Plan.

5. Click on the Search button.

6. If you enter an ID, you will return directly to the Student Program page. If you search by name and more than one record met your search criteria, the search results will display.

   If there is a list returned, click on any link for the appropriate student.
**Steps**

7. The **Student Program** page displays. Verify you are on the “ICT in Progress” row.

8. Click the Add a Row button.
Steps

9. A new row is added with today’s date as the **Effective Date**.

10. Enter the **Program Action** of **DATA** (Data Change).

11. Enter the **Action Reason** of **RICT** (Rescind ICT in progress).

12. The **Academic Program** (college) will remain the same.

13. The **Admit Term** can remain the same (since the student has never left the college).

14. The completed row should look as follows:

15. Either click the **Student Plan** tab or click the link at the bottom of the page.
Steps

16. The **Student Plan** page displays.

17. Verify the **Academic Plan** to be sure the plan number does not need to be updated. If the plan does need updated, enter the Academic Plan Code or select the Academic Plan from the lookup list.

18. Click the **Save** button.
Lesson 12: Minors and Second Majors

Add a Minor and/or a Second Major

When a student has declared that they wish to pursue a minor and/or second major, the student’s Program/Plan page is updated in PeopleSoft.

If the student has already applied for graduation, DO NOT make any changes to the student’s Program/Plan. Please e-mail the information to the Office of the University Registrar at commencement@uakron.edu.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Choose from the menu Records and Enrollment &gt; Career and Program Information &gt; Student Program/Plan.</td>
</tr>
<tr>
<td>2. The Search page displays.</td>
</tr>
<tr>
<td>3. Enter the Student’s ID in the ID field or use the Last Name and First Name fields.</td>
</tr>
<tr>
<td>4. Check the Include History checkbox. NOTE: The Include History box MUST be checked in order to obtain the history of the student’s Program/Plan.</td>
</tr>
<tr>
<td>5. Click on the Search button.</td>
</tr>
<tr>
<td>6. If you enter an ID, you will return directly to the Student Program page. If you search by name and more than one record met your search criteria, the search results will display.</td>
</tr>
</tbody>
</table>
Steps

If there is a list returned, click on any link for the appropriate student.

23. The **Student Program** page displays. Check the student’s **Academic Career** and **Academic Program** to ensure you are on the correct record.

24. Check the **Program Action** to ensure you are able to make changes to this record.

Note: Do **NOT** make any changes if the current Program Action row has an action of:
- Completion
- Discontinuation
- Dismissal
- Leave of Absence
- Suspension
- Administrative Withdrawal
- Data Change (Applied for Graduation, Reinstated for Graduation, or Hold-Over for Graduation)

7. Either click the **Student Plan** tab or click the link at the bottom of the page.
Steps

8. Review the Academic Plan to ensure the Minor and/or second Major does not already exist.
   - If a minor and/or second major already exists, multiple rows will appear.
   - If multiple rows appear, click the View All link to see all rows.

9. Return to the Student Program page by either clicking the Student Program tab or click the link at the bottom of the page.
Steps

10. The **Student Program** page displays.

11. Click the Add a Row button.
Steps

12. A new row is displayed with today’s date in the **Effective Date** field.

13. Enter the **Program Action** of **PLNC** (Plan Change).

14. Enter the **Action Reason** of **M2M** (Minor or Major change).

15. Either click the **Student Plan** tab or click the link at the bottom of the page.
16. The **Student Plan** page displays. In the inner frame (under the second blue bar), click the **Add a Row** button.
Steps

17. A new row is displayed with a blank Academic Plan.

18. Either type the student’s minor or second major in the Academic Plan field or use the lookup icon to search for and select the Academic Plan.

   NOTE: Minor plan numbers end with “M”. Second major plan numbers do not have any letters at the end.

19. Enter the Requirement Term in the field or use the lookup icon to search for and select the Requirement Term.

20. Optional: If the student wishes to pursue more than one minor or second major, repeat steps #16 – #19.

21. Click the Save button.
Remove a Minor and/or a Second Major

When a student has declared that they no longer wish to pursue a minor and/or second major, the student’s Program/Plan page is updated in PeopleSoft.

If the student has already applied for graduation, DO NOT make any changes to the student’s Program/Plan. Please e-mail the information to the Office of the University Registrar at commencement@uakron.edu.

Use the following procedure to remove a minor and/or second major to a student’s Program/Plan.

**Steps**

1. **Choose from the menu** Records and Enrollment > Career and Program Information > Student Program/Plan.

2. **The Search page displays.**

3. **Enter the Student’s ID in the ID field or use the Last Name and First Name fields.**

4. **Check the Include History checkbox. NOTE: The Include History box MUST be checked in order to obtain the history of the student’s Program/Plan.**

5. **Click on the Search button.**

6. **If you enter an ID, you will return directly to the Student Program page. If you search by name and more than one record met your search criteria, the search results will display.**
Steps

If there is a list returned, click on any link for the appropriate student.

7. The **Student Program** page displays. Check the student’s **Academic Career** and **Academic Program** to ensure you are on the correct record.

8. Check the **Program Action** to ensure you are able to make changes to this record.

   Note: Do **NOT** make any changes if the current Program Action row has an action of:
   - Completion
   - Discontinuation
   - Dismissal
   - Leave of Absence
   - Suspension
   - Administrative Withdrawal
   - Data Change (Applied for Graduation, Reinstated for Graduation, or Hold-Over for Graduation)

9. Either click the **Student Plan** tab or click the link at the bottom of the page.
Steps

10. The Student Plan page displays. Review the **Academic Plan** to ensure the Minor and/or second Major exists.

- If a minor and/or second major already exists, multiple rows will appear.
- If multiple rows appear, click the **View All** link to see all rows.

11. Return to the Student Program page by either clicking the **Student Program** tab or click the link at the bottom of the page.
12. The **Student Program** page displays.

13. Click the **Add a Row** button.
14. A new row is displayed with today’s date in the **Effective Date** field.

15. Enter the **Program Action** of PLNC (Plan Change).

16. Enter the **Action Reason** of M2M (Minor or Major change).

17. Either click the **Student Plan** tab or click the link at the bottom of the page.
18. The **Student Plan** page displays. Verify you are on the correct Academic Plan to delete. In the inner frame (under the second blue bar), click the **Delete a Row** button.

19. The row is deleted.

20. Optional: If the student wishes to no longer pursue more than one minor or second major, repeat step #16.

21. Click the **Save** button.
Lesson 13: Test Results

The Test Results page displays the student’s test scores, such as ACT, SAT, GRE, etc.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Choose from the menu Records and Enrollment &gt; Transfer Credit Evaluation &gt; Test Results.</td>
</tr>
<tr>
<td>2. The Search page displays.</td>
</tr>
<tr>
<td>3. Enter the Student’s ID in the ID field or use the Last Name and First Name fields.</td>
</tr>
<tr>
<td>4. Click on the Search button.</td>
</tr>
<tr>
<td>5. If you enter an ID, you will return directly to the Test Results page. If you search by name and more than one record met your search criteria, the search results will display. If there is a list returned, click on any link for the appropriate student.</td>
</tr>
</tbody>
</table>
Steps

6. The Test Results page displays.

![Test Results Page]

**Note**: Don’t forget to check the view tools (circled above) to determine if there are additional rows of data. There may be rows with additional test results.

7. To return to the Test Results Search Page, click on the **Return to Search** button.
Lesson 14: Query Viewer

The Query Viewer is a "read-only" version of Query Manager. The Query Viewer allows read-only access for users who need only to view or print queries.

The Query Viewer allows you to:
- Search for a query using a basic or advanced search
- Run a query
- Download the results of a query into a Microsoft Excel Spreadsheet
- Print a query

As an Advisor, you may need to run a query to get a list of your currently enrolled students. The query name is: **UA_UNIV_ADV_MY_OWN_LIST**

### Steps

1. Navigate using the following path:
   **Reporting Tools > Query > Query Viewer**

2. The Query Viewer Basic Search page displays:

   ![Query Viewer Basic Search Page](image)

3. If the beginning characters of the Query Name or Description **are known**, remain on the **Basic Search** page.
   a. Search by Query Name or Description by selecting at the down arrow.
   b. In the edit box of the Search by row, enter the beginning characters.

   **If the beginning characters of the Query Name or Description **are not known**, proceed to the next step to do an Advanced Search.**
Steps

4. To perform an Advanced Search, click on the **Advanced Search** link

![Advanced Search](image)

5. The **Advanced Search** page displays:

![Advanced Search Page](image)

6. Select the criteria to locate the query you need. The following selections are one example:
   a. Search by **Query Name**.
   b. Select a logical operator from the list at the down arrow.
   c. In the edit box of the Query Name row, type the text that is a part of the query’s name.

7. Click the **Search** button.
Steps

8. The results display. Locate the query and select the link for HTML (to open the query in the web browser) or Excel (to run the query directly to a Microsoft Excel spreadsheet).

9. Some queries contain prompts; in this example the following prompt returns:

Enter data in the prompts and click on the View Results button.
Steps

10. The results will display in an Internet Explorer window.

11. From the results window, you can review the query results, download the results in an Excel Spreadsheet or download the results in a CSV Text file.

   Select Excel Spreadsheet for data that has been formatted for a report appearance.

   Select CSV Text File for data that has little formatting. This file may be opened in Excel or a database program, such as Access. Use the CSV format if the data will be used for a Word mail merge.

12. When you are finished with the data, close the Internet Explorer Window with the query results to return to the original PeopleSoft window with the Query Viewer.
Lesson 15: Operator Defaults

Setting User Defaults

Users need to set default values for certain types of data that are entered in PeopleSoft on a frequent basis. Setting these default values makes the repetitive data entry process and search process more efficient. User Defaults apply only to the user who is signed on to PeopleSoft. These defaults may be changed as necessary.

Steps

1. From the Menu, select **Setup SACR > User Defaults**.

2. The User Defaults page displays.

3. In the **Academic Institution** field, enter AKRON.

Some other defaults that you may want to set are:

- **Academic Career**: If you usually enter data for a particular career (UGRD, GRAD, or LAW), you may set this field to default.

- **Academic Group**: If you usually enter data for a particular college, you may set this field to default.
Steps

- **Term**: You can set the term to the current term, but remember to change this field at the start of each term.

4. Click on the folder tab for **User Defaults 4**.

5. **Carry ID** should be checked by default. This feature will populate the search pages with the ID number of the student as you navigate from one page to another. The ID will keep moving forward until you delete it.

6. Use the **Lookup** button in the **Transcript Type** field to select the option for UNOFF. You can also type the letters. This is for users who will be running the Unofficial Transcript report.

7. Click on the **Save** button.
Appendix A: Address Changes

A student may have multiple Address Types (Home, Mailing, Work, etc.) and multiple effective-dated Addresses within each Address Type. The current address is the address with the Effective Date closest to today’s date without going beyond today.

It is critical to understand what you are adding and to use the appropriate procedure:

- A new Address Type and corresponding Address (Part A: Adding a New Address Type and Address) OR
- A new Address to an already existing Address Type (Part B: Updating Addresses) OR
- Copy an existing Address to a new Address Type (Part C)

Note: Students should be encouraged to change their own addresses via the Student Self Service.

Steps

1. Choose from the menu Campus Community > Personal Information (Student) > Add/Update a Person.

2. The Search page displays.

3. Enter the Student’s ID in the Empl ID field or use the Last Name and First Name fields.

4. Click the Include History checkbox.
Steps

5. Click on the **Search** button.

6. If you enter an ID, you will return directly to the Biographical Details page. If you search by name and more than one record met your search criteria, the search results will display.

   If there is a list returned, click on any link for the appropriate student.

7. The **Biographical Details** page displays. Click on the **Addresses** tab.
8. The **Addresses** page displays:

9. Proceed to:
   - Part A of this chapter to **add a new** Address Type and address.
   - Part B of this chapter to **update** an address for an existing Address Type.
   - Part C of this chapter to **copy** an existing address to a new Address Type.
Part A: Adding a New Address Type and Address

Steps

1. Click to mark the Address Type.

   If an asterisk already appears by an address type this indicates that the address type exists. If there is an asterisk, use the instructions in Part B: Updating Addresses.

2. Select Effective Date. The Effective Date defaults to the current date.

   Change the Effective Date as necessary.

   Warning: You should enter only present and future effective dates for addresses. Do not enter backdated effective dates.

3. Select Country. Enter the Country code or click on the Lookup tool to select from the list.

4. Click on the Edit Address link.
Steps

5. Enter the Address information. The following fields are required at The University of Akron.
   - **Address 1**
   - **City**
   - **State**
   - **Postal**
   - **County** (If State = OH, then County is a required field.)

   ![Edit Address Form](image)

6. Click **OK**.
Steps

10. The Addresses page displays with the new data.

11. If the Address Type to update was not marked in a previous step, click to mark it now.

12. Click on the **Submit** button.

13. Click on the **Save** button.
Part B: Updating Addresses

Steps

1. Click on the **Edit/View Address Detail** link for the Address Type to update.

2. The existing address for the student displays. Click on the Add a new row tool **+**.
Steps

3. A new row is added. The existing address is copied to the new row.

4. The Effective Date defaults to the current date. If necessary, change the **Effective Date**.

   **Warning:** You should enter present and future effective dates only for addresses. Do not enter backdated effective dates.

5. Select **Country**. Enter the Country code or click on the Lookup tool to select from the list.
Steps

6. Click on the Update Addresses link.

7. Enter the new address by typing over and changing the existing information. The following fields are required at The University of Akron.
   - Address 1
   - City
   - State
   - Postal
   - County (If State = OH, then County is a required field.)

Address information should be entered using appropriate upper and lower case.
Steps

8. Click on the OK button.

9. The Address History page displays with the updated address. Click on the OK button.

10. The new address is displayed.
<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Scroll to the bottom of the page and click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>12. To view History, click on the <strong>Edit/View Address Detail</strong> link for the appropriate Address Type.</td>
</tr>
</tbody>
</table>
Part C: Copy an Existing Address to a New Address Type

Steps

1. In the **Address Type** column, click to select the link for the **Address Type** to copy.

   Use the **View All** link to see the list of existing Address Types.

   Click on the link for the Address Type to copy.
Steps

2. The copied address is displayed below the Edit Address link on the page.

3. Click to mark the **Address Type** to be created with this same address.

   If an asterisk appears before the Address Type, an active address already exists for that Address Type.

4. Click on the **Submit** button.

5. Scroll to the bottom of the page and click on the **Save** button.

6. Click on the **View All** link to see all the Address Types.
Steps

7. All of the Address Types display:

![Address Types Display](image)

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Address</th>
<th>Effective Date</th>
<th>Status</th>
<th>Updated By</th>
<th>Updated</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>125 North Main St Youngstown, OH 44515-2807 Mahoning</td>
<td>01/23/2015</td>
<td>Active</td>
<td>Susan McKibben</td>
<td>01/23/2015 3:04:56PM</td>
<td>Edit/View Address Detail</td>
</tr>
<tr>
<td>Mailing</td>
<td>Office of the University Registrar Simmon Hall Akron, OH 44325-6208 Summit</td>
<td>08/10/2008</td>
<td>Active</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td>1800 Pennsylvania Avenue Akron, OH 44325 Summit</td>
<td>01/23/2015</td>
<td>Active</td>
<td>Susan McKibben</td>
<td>01/23/2015 2:23:45PM</td>
<td>Edit/View Address Detail</td>
</tr>
<tr>
<td>Legal</td>
<td>1234 Split Test Blvd Akron, OH 44325 Summit</td>
<td>11/28/2014</td>
<td>Active</td>
<td></td>
<td>11/28/2014 3:30:05PM</td>
<td>Edit/View Address Detail</td>
</tr>
<tr>
<td>Student</td>
<td>This is a test address for Joe Q Student Akron, OH 44325 Summit</td>
<td>10/12/2011</td>
<td>Active</td>
<td></td>
<td>11/28/2014 3:26:34PM</td>
<td>Edit/View Address Detail</td>
</tr>
<tr>
<td>Other</td>
<td>Office of the University Registrar Simmon Hall Akron, OH 44325-6208 Summit</td>
<td>01/23/2015</td>
<td>Active</td>
<td>Susan McKibben</td>
<td>01/23/2015 3:14:13PM</td>
<td>Edit/View Address Detail</td>
</tr>
<tr>
<td>Advancement</td>
<td>Office of the University Registrar The University of Akron Akron, OH 44325-6208 Summit</td>
<td>12/15/2011</td>
<td>Active</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix B: Athletic Participation

This lesson demonstrates how to determine if a student is an athlete at The University of Akron.

**Steps**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the menu choose <strong>Campus Community &gt; Personal Information (Student) &gt; Participation Data (Student) &gt; Athletic Participation.</strong></td>
</tr>
<tr>
<td>2.</td>
<td>The Search page displays.</td>
</tr>
<tr>
<td>3.</td>
<td>Enter the Student’s ID in the <strong>EmpID</strong> field or use the <strong>Last Name</strong> and <strong>First Name</strong> fields.</td>
</tr>
<tr>
<td>4.</td>
<td>Click on the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>5.</td>
<td>If you entered an ID, you will return directly to the Athletic Participation page. If you searched by name and more than one record met your search criteria, the search results will display.</td>
</tr>
</tbody>
</table>

If there was a list returned, click on any link for the appropriate student.
Steps

6. The **Athletic Participation** page displays. Review the information displayed to determine if the student is an athlete.

![Athletic Participation Page](image)

7. To return to the Athletic Participation Search Page, click on the **Return to Search** button.
Appendix C: Prior Education (High School & College)

This lesson demonstrates how to locate information about a student’s previous education such as college and/or high school attended.

Steps

1. From the menu choose **Student Admissions > Applicant Summaries > Education Summary**.

2. The Search page displays.

3. Enter the Student’s ID in the **ID** field or use the **Last Name** and **First Name** fields.

4. Click on the **Search** button.

5. If you entered an ID, you will return directly to the External Academic Summary page. If you searched by name and more than one record met your search criteria, the search results will display.

   If there was a list returned, click on any link for the appropriate student.
Steps

6. The **External Academic Summary** page displays. Click the **Search** button in the "Select Academic Data By" frame.

7. The page will now list any high school or colleges the student previously attended.

8. Click the **Transcript Data** link to review basic transcript data.
Steps

9. The Transcript data displays.

10. Click the **Return** button to go back to the External Academic Summary page.

11. Click on the **Academic Data Detail** link.
12. The **Academic Data Detail** page displays.

13. Click the **Return** button to return to the External Academic Summary page.

14. Click on the **External Subject Summary** tab.

15. The **External Subject Summary** data displays. Click the **Search** button.
16. The External Subject Summary data displays. Click on the **Transcript Data** and the **Academic Subject Detail** links for more specific data.

17. Click on the **External Degree Summary** tab.

If a completed degree has been recorded for the student, the summary will show here.
Steps

18. Click on the **External Course Summary** tab.

If any course level detail has been recorded, a summary will appear here. More detail can be obtained by clicking on the **Transcript Data** and **Course Detail** data links.
Appendix D: Visa Permit Data

The Visa Permit Data can also be found in the Advising Self Service on the Student Center tab, under Personal Information.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Choose from the menu <strong>Campus Community &gt; Personal Information (Student) &gt; Identification (Student) &gt; Visa Permit Data.</strong></td>
</tr>
<tr>
<td>2. The Search page displays.</td>
</tr>
<tr>
<td>3. Enter the Student’s ID in the <strong>Empl ID</strong> field or use the <strong>Last Name</strong> and <strong>First Name</strong> fields.</td>
</tr>
<tr>
<td>4. Click on the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>5. If you entered an ID, you will return directly to the Port of Entry Data page. If you searched by name and more than one record met your search criteria, the search results will display. If there was a list returned, click on any link for the appropriate student.</td>
</tr>
</tbody>
</table>
Steps

6. The **Port of Entry Data** displays. Review the page as necessary.

7. To return to the Visa Permit Data Search Page, click on the **Return to Search** button.
## Appendix E: Advising Navigation Paths

<table>
<thead>
<tr>
<th>What</th>
<th>Where</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Interest</td>
<td>Student Admissions &gt; Application Entry &gt; Academic Information &gt;</td>
</tr>
<tr>
<td></td>
<td>Academic Interests</td>
</tr>
<tr>
<td>Address (changes)</td>
<td>Campus Community &gt; Personal Information (Student) &gt; Add/Update a Person</td>
</tr>
<tr>
<td>Athletic Participation</td>
<td>Campus Community &gt; Personal Information (Student) &gt; Participation Data (Student) &gt; Athletic Participation</td>
</tr>
<tr>
<td>Comments</td>
<td>Inquire: Campus Community &gt; Comments- Person &gt; Person Comment Summary</td>
</tr>
<tr>
<td></td>
<td>Add: Campus Community &gt; Comments- Person &gt; Person Comment Entry</td>
</tr>
<tr>
<td>Communications</td>
<td>Records and Enrollment &gt; 3 C’s Summaries &gt; Communication Summary</td>
</tr>
<tr>
<td>Enrollment Summary</td>
<td>Records and Enrollment &gt; Enrollment Summaries &gt; Enrollment Summary</td>
</tr>
<tr>
<td>External Information</td>
<td>Student Admissions &gt; Application Entry &gt; Academic Information &gt;</td>
</tr>
<tr>
<td></td>
<td>Education</td>
</tr>
<tr>
<td>FERPA</td>
<td>Campus Community &gt; Personal Information &gt; Biographical &gt; Person FERPA &gt; FERPA</td>
</tr>
<tr>
<td>Operator Defaults</td>
<td>Setup SACR&gt; User Defaults</td>
</tr>
<tr>
<td>Personal Information</td>
<td>Campus Community &gt; Personal Information &gt; Add/Update a Person</td>
</tr>
<tr>
<td>Program/Plan</td>
<td>Records and Enrollment &gt; Career and Program Information &gt;</td>
</tr>
<tr>
<td></td>
<td>Student Program Plan</td>
</tr>
<tr>
<td>Query Viewer</td>
<td>Reporting Tools &gt; Query &gt; Query Viewer</td>
</tr>
<tr>
<td>Self Service</td>
<td>Self Service &gt; View My Advisees</td>
</tr>
<tr>
<td>Service Indicators</td>
<td>Campus Community &gt; Service Indicators (Student) &gt; Manage Service Indicators</td>
</tr>
<tr>
<td>What</td>
<td>Where</td>
</tr>
<tr>
<td>------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Student Advisor</strong></td>
<td>Records and Enrollment &gt; Student Background Information &gt; Student Advisor</td>
</tr>
<tr>
<td><strong>Student Groups</strong></td>
<td>Records and Enrollment &gt; Career and Program Information &gt; Student Groups</td>
</tr>
<tr>
<td><strong>Student’s Grade Report</strong></td>
<td>Self Service &gt; View My Advisees OR Records and Enrollment &gt; Student Term Information &gt; Student Grades</td>
</tr>
<tr>
<td><strong>Test Results</strong></td>
<td>Records and Enrollment &gt; Transfer Credit Evaluation &gt; Test Results</td>
</tr>
<tr>
<td><strong>Unofficial Transcript</strong></td>
<td>Self Service &gt; View My Advisees</td>
</tr>
<tr>
<td><strong>Visa/Permit Data</strong></td>
<td>Campus Community &gt; Personal Information (Student) &gt; Identification (Student) &gt; Visa Permit Data</td>
</tr>
</tbody>
</table>