

# Student Services 2 Training Manual

Revised: February 24, 2006  
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## Keyboard Shortcuts

<b>Function</b>	<b>Menu Option</b>	<b>Keystroke Option</b>
Cancel Query	Query/Cancel	Ctrl + Q
Clear or Delete Record	Record/Clear or Record/Remove	Shift + F6
Enter Query	Query/Enter	F7
Execute Query	Query/Execute	F8
Exit	File/Exit	Ctrl + Q
Insert Record	Record/Insert	F6
Next Block	Block/Next	Ctrl + Page Down
Next Field	Field/Next	Tab
Next Record	Record/Next	Down Arrow
Previous Block	Block/Previous	Ctrl + Page Up
Previous Field	Field/Previous	Shift + Tab
Previous Record	Record/Previous	Up Arrow
Rollback	File/Rollback	Shift + F7
Save	File/Save	F10
Select	File/Select	Shift + F3

## Toolbar Buttons



Save



Rollback



Select



Insert Record



Delete Record



Enter Query



Execute Query



Cancel Query



Previous Record



Next Record



Previous Block



Next Block



Bookshelf (SCT Documentation)



Online Help



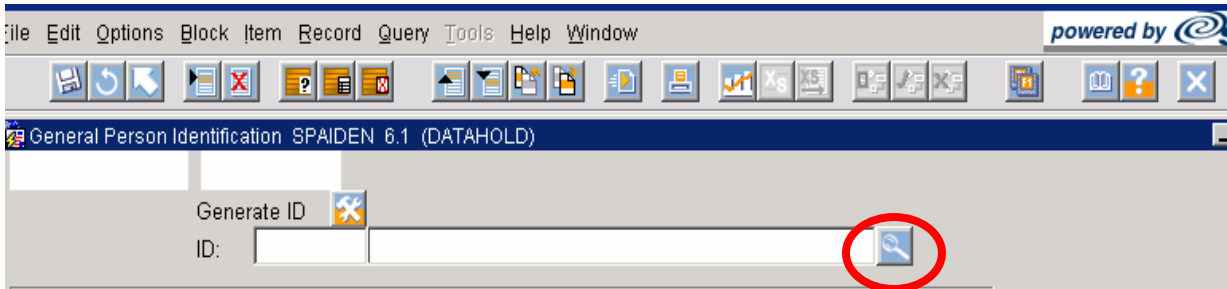
Exit

## Searching for a Student

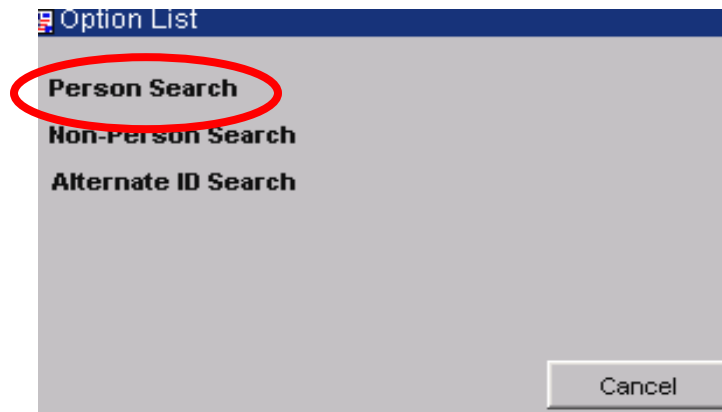
A person search may be performed using any form that has the ID field in the Key Block, such as SPAIDEN, SPAPERS, GOAEMAL, SPAEMRG, SGASTDN, SGAADV, SGASTDQ and SPATELE. The **Search** icon (magnifying glass) on any form will take you to an additional form, which allows you to enter information to perform a search. A search can be performed using a partial name or UNC Charlotte ID.

*To initiate a search:*

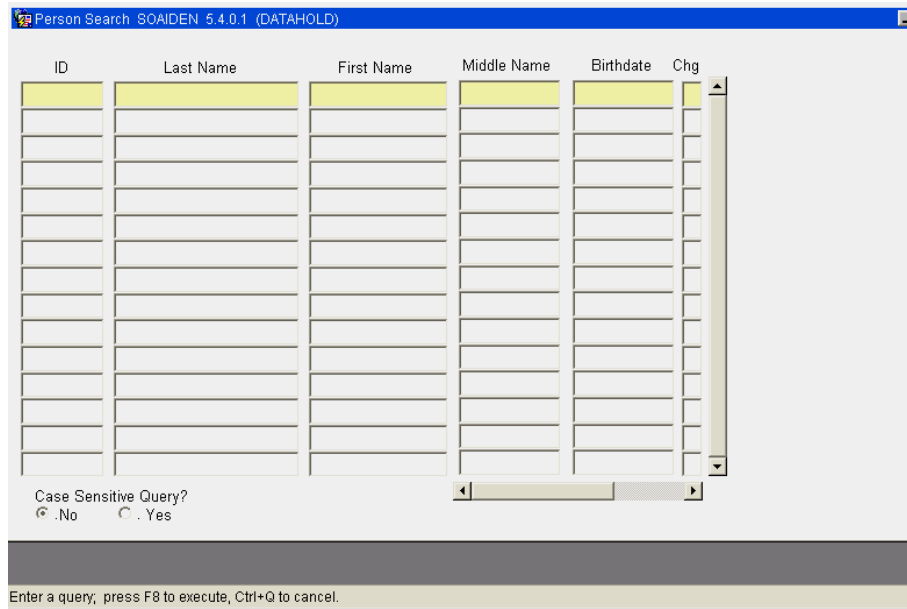
1. Click the **Search** icon (magnifying glass) next to the ID field to access the person search form.



2. Click on **Person Search** from the Options list.



3. This will open the **SOAIDEN** Person Search Form.



## Wildcards

The wildcard “%” can represent any number of characters in the selected position.

- Querying “sm%h” would return Smith, Smooth, and Smertsworth, but not Smythe.

The wildcard “\_” (underscore) represents a *single* character in the selected position.

- Querying “sm\_th” would return Smith but not Smooth.

### *To search using a last name:*

1. In the **Last Name** field on the Person Search Form (**SOAIDEN**), enter the last name of the student.
2. Execute the query by clicking the **Execute Query** icon (or press **F8**).
3. Double click on the student for whom you are searching.
4. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

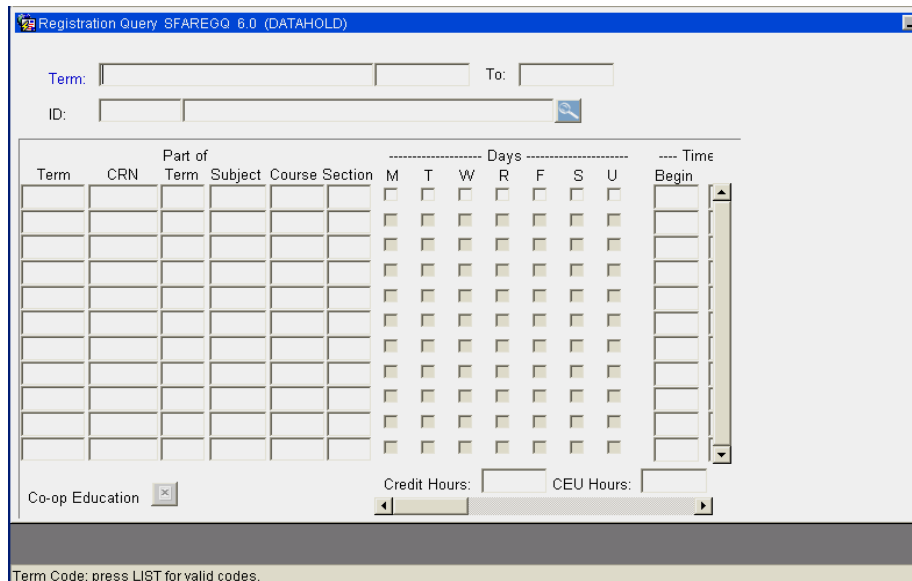
### *To search using a partial last name:*

1. In the **Last Name** field on the Person Search Form (**SOAIDEN**), enter the partial last name of the student.
2. You must use the wildcard “%” to represent the unknown characters.
  - “Cov%” will search for all people with last names that start with Cov.
3. Execute the query by clicking the **Execute Query** icon (or press **F8**).
4. Double click on the student for whom you are searching.
5. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

### *To search using a partial UNC Charlotte ID:*

1. In the ID field on the Person Search Form (**SOAIDEN**), enter the partial UNC Charlotte ID.
2. You must use the wildcard “%” to represent the unknown characters.
  - Use “80021%” to search for all UNC Charlotte IDs that start with 80021.
3. Execute the query by clicking the **Execute Query** icon (or press **F8**).
4. Double click on the student for whom you are searching.
5. This will transfer the UNC Charlotte ID back to the ID field on the form with which you are working.

## Viewing a Student's Class Schedule



Registration Query SFAREGQ 6.0 (DATAHOLD)

Term:  To:

ID:

Term	CRN	Part of Term	Subject	Course	Section	Days							Time Begin
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						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>						

# Viewing a Student's Account Summary

Customer Service Inquiry TSICSRV 6.0.0.2 (DATAHOLD)

ID:  Credit Limit

Last Term Registered  Sum by effective date  Holds:

Detail Code	Description	Term	Charge	Payment	Balance	Effective Date

Query Balance  Account Balance  Current Due

Financial Aid

Memo Balance  Auth Aid Balance  Other Memos  NSF

ID Number, press LIST for person, COUNT HITS for non-person, DUPLICATE ITEM for Alternate ID Lookup, CREATE ENTITY to add.

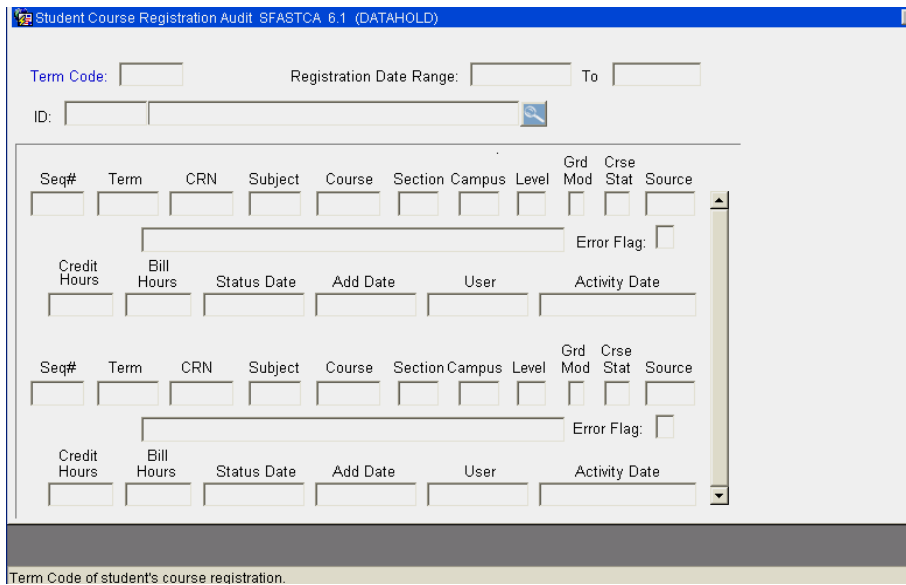
1. Access the Customer Service Inquiry form (**TSICSRV**) from the General Menu.
  - The first time you access **TSICSRV** (after logging in), the **TOADEST** form will appear; you *do not* need to enter anything on this form.
  - Click the **Exit** icon (or **Ctrl-Q**) to exit.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not know the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions).
3. Perform a **Next Block**.
  - The student's account summary will be listed in the Information block.
  - Use the down arrow or scroll bar on the side of the form for additional information.
4. To view another student, click the **Rollback** icon (or **Shift-F7**) and repeat steps 2 and 3.
5. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

## Please Note:

To query on a specific term:

- Enter query by clicking the enter query icon (or **F7**).
- Enter desired term in the **Term** field.
- Execute the query with the execute query icon (or **F8**).

## Viewing a Student's Registration Audit Trail



1. Access the Student Course Registration Audit form (**SFASTCA**) from the General Menu.
2. In the **Term** field, enter the term you want to view.
3. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not know the ID of the student, click the **Search** icon to perform a query. (see pages 5-6 for additional instructions on searching).
4. Perform a **Next Block**.
  - The student's audit trail will be listed in the Information block.
  - In the **Crse Stat** field the following codes may appear. The **first** letter denotes:
    - R – Registered
    - D – Dropped
    - W - Withdrawn
  - Use the down arrow or scroll bar on the side of the form for additional information.
5. To view another student, click the **Rollback** icon (or **Shift-F7**) and repeat steps 2-4.
6. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

### Please Note:

Each registration attempt will have either a TEMP or a BASE code listed in the **Source** field.

- **TEMP** – a temporary file in which registration is held while the system is checking restrictions, pre-requisites, and co-requisites.
- **BASE** – the registration file in which information is stored after all restriction, pre-requisite, and co-requisite checking is complete.

### To query specific information:

- Enter query by clicking the **Enter Query** icon (or **F7**).
- Enter the search criteria (Term, CRN, Subject, etc).
- Execute the query with the **Execute Query** icon (or **F8**).

## Viewing a Student's Holds

The screenshot shows a web application window titled "Hold Information SOAHOLD 6.3 (DATAHOLD)". At the top, there is an "ID:" field with a search icon. Below this is a section titled "Holds" containing a list of hold records. Each record has fields for "Hold Type", "Reason", "From", "To", "Orig", "Rel", and "Amount". A vertical scroll bar is on the right side of the holds list. At the bottom of the window, there is a small text box that reads "ID number, LIST for person, COUNT HITS for non-person search."

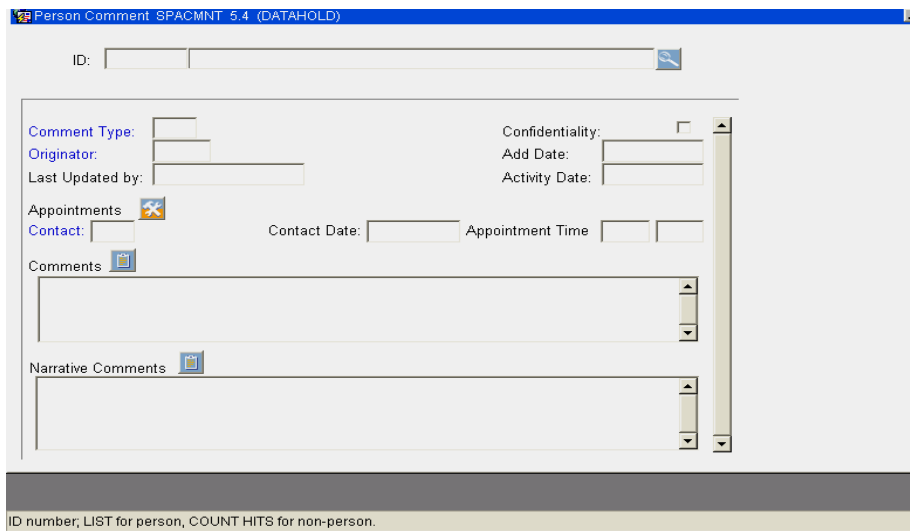
1. Access the Hold Information form (**SOAHOLD**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not know the ID of the student, click the **Search** icon to perform a query, (see pages 5-6 for additional instructions on searching).
3. Perform a **Next Block**.
4. The student's holds will be displayed.
  - The **From** date is the date the hold begins. This date is also usually the date the hold was placed.
  - The **To** date is the end date of the hold. Dec. 31, 2099 represents the end of time.
  - Use the scroll bar to the right of the form or the down arrow key to view additional holds.
5. To view another student, click the **Rollback** icon (or **Shift-F7**) and repeat steps 2 and 3.
6. To return to the General Menu, click **Exit** icon (or **Ctrl-Q**).

### Please Note:

To query a specific hold type:

- Enter query by clicking the **Enter Query** icon (or **F7**).
- Enter the Hold Type to query (double click in the **Hold Type** field for a list of values).
- Execute the query with the **Execute Query** icon (or **F8**).

## Viewing a Student's Comments



1. Access the Person Comment form (**SPACMNT**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not know the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions on searching).
3. Perform a **Next Block**.
  - The comments pertaining to the student will be displayed.
  - Use the scroll bar to the right of the form or the down arrow key to view additional comments.
4. To view another student, click the **Rollback** icon (or **Shift-F7**) and repeat steps 2 and 3.
5. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

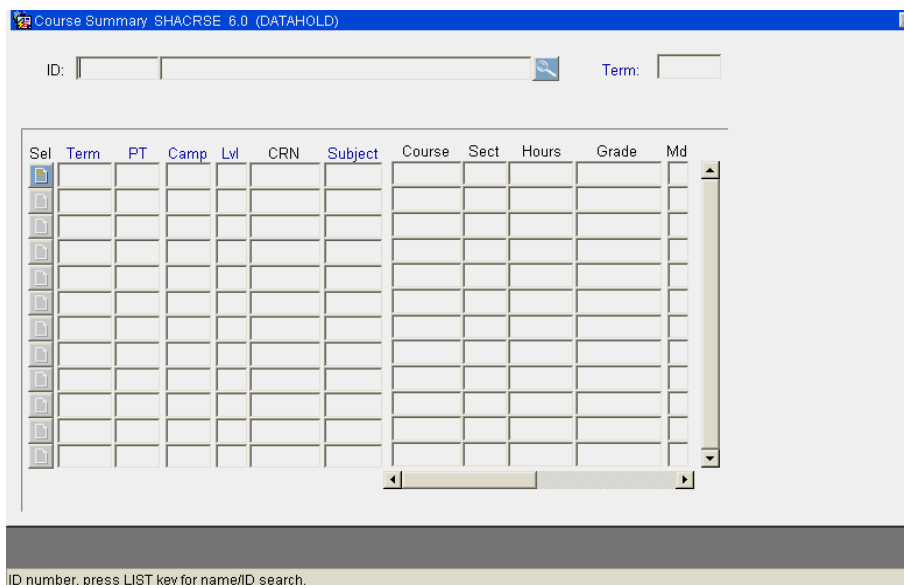
### *To query a specific comment type:*

1. Enter query by clicking the **Enter Query** icon (or **F7**).
2. Enter the Comment Type to query (double click in the **Comment Type** field for a list of values).
3. Execute the query with the **Execute Query** icon (or **F8**).

### *Entering a comment:*

1. Perform steps 1 through 3.
2. Place the cursor in the comment field and type the comment.
3. Click the **Save** icon (or **F10**).

# Viewing a Student's Academic History



Course Summary SHACRSE 6.0 (DATAHOLD)

ID:   Term:

Sel	Term	PT	Camp	Lvl	CRN	Subject	Course	Sect	Hours	Grade	Md
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											
<input type="button" value="Detail"/>											

ID number, press LIST key for name/ID search.

## Course Summary

1. Access the Course Summary form (**SHACRSE**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions on searching).
3. In the **Term** field, enter the term you wish to view.
  - For a list of all courses, leave the **Term** field blank.
4. Perform a **Next Block** to display a course summary for the student.
  - Use the scroll bar at the bottom of the form or the down arrow key to view additional information.
  - In the **MD** (grade mode) field, the following codes may appear:
    - S – Standard
    - P – Pass/ No Credit
    - A - Audit
  - To view detailed information for a specific course, click the **Detail** icon to the left of the course.
  - To return to the **SHACRSE** form, click the **Exit** icon (or **Ctrl-Q**).
5. To view another student, click the **Rollback** icon (or **Shift-F7**) and repeat steps 2-4.
6. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

## Please Note:

To query specific information:

1. Enter query by clicking the **Enter Query** icon (or **F7**).
2. Enter the search criteria (CRN, Subject, etc.).
3. Execute the query with the **Execute Query** icon (or **F8**).

# Viewing a Student's Academic History

Term Sequence Course History SHATERM 6.2 (DATAHOLD)

ID: 800078487 Little, Marko C. Level: UG

Start Term:

Term GPA and Course Detail Information SHATERM 6.2 (DATAHOLD)

Institution or Transfer  I Transfer Number  Attendance Period

Term	Attempted	Passed	Earned	GPA Hours	Quality Points	
200180	15.000	15.000	15.000	15.000	47.00	
					GPA	3.133
Cumulative	102.000	102.000	102.000	56.000	148.00	
					GPA	2.643

Subject	Course	Institutional Courses Title	Grade	Mode	Hours	Re-peat	Campus
FREN	1101	Elem Fren II Proficiency	S	E	.000		
RUSS	1201	Elem Russian	C	S	4.000		
SPED	2100	Intro Studnts Spec Nds	B	S	2.000		
HIST	1161	Us History II(C)	B	S	3.000		
EDUC	2100	Intro To Educ Div In Schl(C)	A	S	3.000		

## Term Course History

1. Access the Term Sequence Course History form (**SHATERM**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to perform a query, (see pages 5-6 for additional instructions).
3. In the **Level** field, enter the level of the courses you want to view.
4. In the **Start Term** field, enter the term you wish to view.
  - To view summary information for all terms, leave the **Term** field blank.
5. Perform a **Next Block** to display a term summary for the student.
6. Perform another **Next Block** to display the **Term GPA and Course Detail Information** window.
  - Both Institution and Transfer credit are displayed on this form.
    - Institution credit is noted with an “I” in the **Institution or Transfer** field.
    - Transfer credit is noted with a “T” in the **Institution or Transfer** field.
  - Use the scroll bar to the right of the form or the down arrow key to scroll through the term information.
7. Perform an additional **Next Block** to navigate to the **Course Detail** section.
  - Use the scroll bar to the right of the form or the down arrow key to scroll through the Course Detail section.
8. Perform a **Next Block** to navigate back to the **SHATERM** form.
  - To view another student, click the **Rollback** icon (or **Shift-F7**) and repeat steps 2 through 8.
9. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

## Viewing a Student's Academic History

Subject Sequence History SHASUBJ 6.0 (DATAHOLD)

ID: 800078487 Little, Marko C. Level: UG

Subject GPA and Course Detail Information SHASUBJ 6.0 (DATAHOLD)

Subject:	Attempted	Passed	Earned	GPA Hours	Quality Points
Institution:	.000	.000	.000	.000	.00
Transfer:	18.000	18.000	18.000	9.000	21.00
<b>Total:</b>	<b>18.000</b>	<b>18.000</b>	<b>18.000</b>	<b>9.000</b>	<b>21.00</b>
GPA					2.333

Institutional Courses

Term	Subj	Course	Title	Grade	Mode	Hours	Rpt	Camp

Transfer Courses

Term	Subj	Course	Title	Grade	Mode	Hours	Count in GPA
200180	ENGL	2104	Maj Am Writers(L)		TB	T	3.000 <input checked="" type="checkbox"/>
200180	ENGL	1101	ENGL COMPOSITION		C	T	3.000 <input checked="" type="checkbox"/>

Press NEXT RECORD for next subject area display.

### Subject History

1. Access the Subject Sequence History form (**SHASUBJ**) from the General Menu.
2. In the **ID** field, enter the UNC Charlotte ID of the student.
  - If you do not have the ID of the student, click the **Search** icon to perform a query (see pages 5-6 for additional instructions).
3. In the **Level** field, enter the level of the courses you want to view.
4. In the **Start with Subject** field, enter the subject code you want to view.
  - To view course information for all subjects, leave the **Start with Subject** field blank.
5. Perform a **Next Block** to display a term summary for the student.
6. Perform another **Next Block** to display the Subject GPA and Course Detail information.
  - Subject codes are listed in alphabetical order.
  - If a subject code was entered in the **Start with Subject** field, the summary will begin with that subject; otherwise the summary will begin with the *first* subject code.
  - Use the scroll bar to the right of the form or the down arrow key to scroll through the Subject GPA information.
7. Perform another **Next Block** to navigate to the Institutional Course Detail section.
  - Use the scroll bar to the right of the form or the down arrow key to scroll through the Institutional Course Detail section.
8. Perform another **Next Block** to navigate to the Transfer Course Detail section.
  - Use the scroll bar to the right of the form or the down arrow key to scroll through the Transfer Course Detail section.
9. Perform an additional **Next Block** to navigate back to the **SHATERM** form.
  - To view another student, click the **Rollback** icon (or **Shift F7**) and repeat steps 2-8.
10. To return to the General Menu, click the **Exit** icon (or **Ctrl Q**).

# Viewing Section Information

The screenshot shows a software window titled "Schedule SSASECT 6.2.0.1 (DATAHOLD)". At the top, there are input fields for "Term:" and "Course Ref. Number:". Below this is a section titled "Section Information" containing various fields:

- Subject: [ ]
- Section: [ ]
- Campus: [ ]
- Status: [ ]
- Schd Type: [ ]
- Instruct Meth: [ ]
- Grade Mode: [ ]
- Session: [ ]
- Appr: [ ]
- Duration: [ ]
- Part/Term: [ ]
- Reg Dates: [ ]
- Start Dates: [ ]
- Extn Max: [ ]
- Crse Number: [ ]
- Cross List: [ ]
- Credit/CEU Ind: [ ]
- Billing: [ ]
- Contact: [ ]
- Link Ident: [ ]
- Attendance Method: [ ]

At the bottom of the form, there are checkboxes for "Long Title", "Comments", and "Syllabus". To the right of these are several checked and unchecked options: "Print" (checked), "Gradable" (checked), "Tuit/Fee Waiver" (unchecked), "VR/Web Avail" (unchecked), and "CAPP Areas for Pre-requisites" (unchecked). A status bar at the very bottom reads: "CRN; type 'ADD' to add new section; 'ADD' and NEXTITEM to default; CQH existing."

1. Access the Schedule form (**SSASECT**) from the General Menu.
2. In the **Term** field, enter the term code you wish to view.
3. In the **CRN** field, enter the Course Reference Number of the section you wish to view.
  - a. If you do not know the CRN of the section, double click in the **Course Reference Number** field to perform a query.
  - b. Enter section search criteria (subject, course number, section number, etc.).
  - c. Click the **Execute Query** icon (or press **F8**) to search for sections that match your criteria.
  - d. Select the section you want by double clicking on the **CRN** field; the CRN will be entered on the **SSASECT** form.
4. Perform a **Next Block** to view section information.

## *Maximum Enrollment*

- From the main schedule form, click on the **Options** menu at the top of the form.
- Select **Section Enrollment Info**; this will display the Enrollment Data window.
- Perform a **Previous Block** to return to the main Schedule Form.

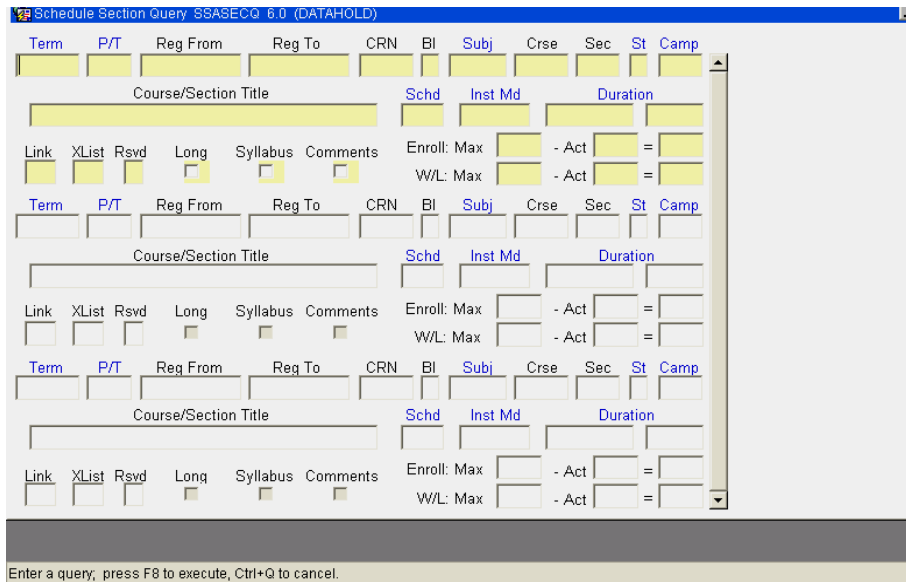
## *Meeting Days/Times, Building/Room Information*

- From the main schedule form, click on the **Options** menu at the top of the form.
- Select **Scheduled Meeting Times**; this will display the Meeting Time window.
- Use the scroll bar at the bottom of the form or the right arrow key to view additional information.
- Perform a **Previous Block** to return to the main Schedule Form.

## *Instructor*

- From the main Schedule Form, click on the **Options** menu at the top of the form.
  - Select **Assigned Instructors**, this will display the Instructor window.
  - Perform a **Previous Block** twice to return to the main Schedule Form.
5. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

## Searching for a Section



Enter a query; press F8 to execute, Ctrl+Q to cancel.

1. Access the Schedule Query form (**SSASECQ**) from the General Menu.
2. Double click in the **Course Reference** field to enter a search criteria.
3. Enter section search criteria (term, subject, course number, section number, etc.).
4. Click the **Execute Query** icon (or **F8**) to search for sections that match your criteria.
5. Select the section you want by double clicking on the **CRN**, and the **CRN** will be entered on the **SSASECT** form.

