

# Student Services 2 Training Manual

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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

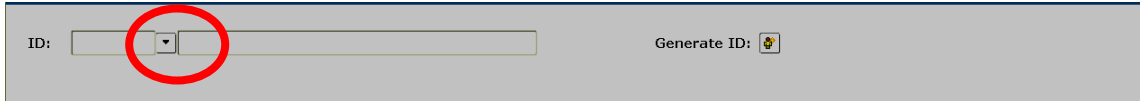
	Save
	Rollback
	Select
	Insert Record
	Delete Record
	Previous Record
	Next Record
	Previous Block
	Next Block
	Enter Query
	Execute Query
	Cancel Query
	Online Help
	Exit

# Searching for a Student

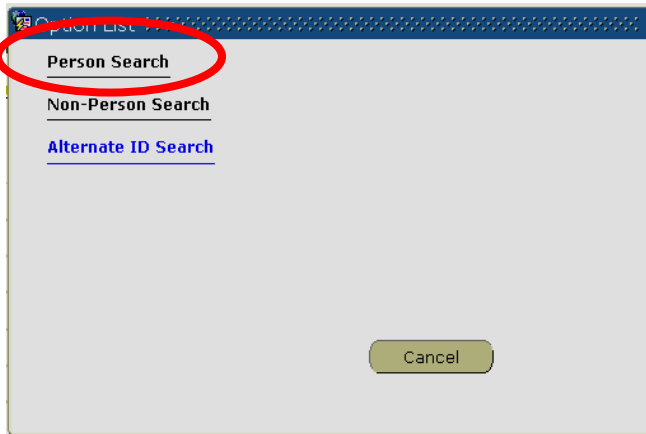
A person search may be performed using any form that has the ID field in the Key Block, such as **SPAIDEN**, **SPAPERS**, **GOAEMAL**, **SPAEMRG**, **SGASTDN**, **SGAADVR**, **SGASTDQ** and **SPATELE**. The **Search** icon (**down arrow**) next to the ID field, will take you to an additional form, which 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:*

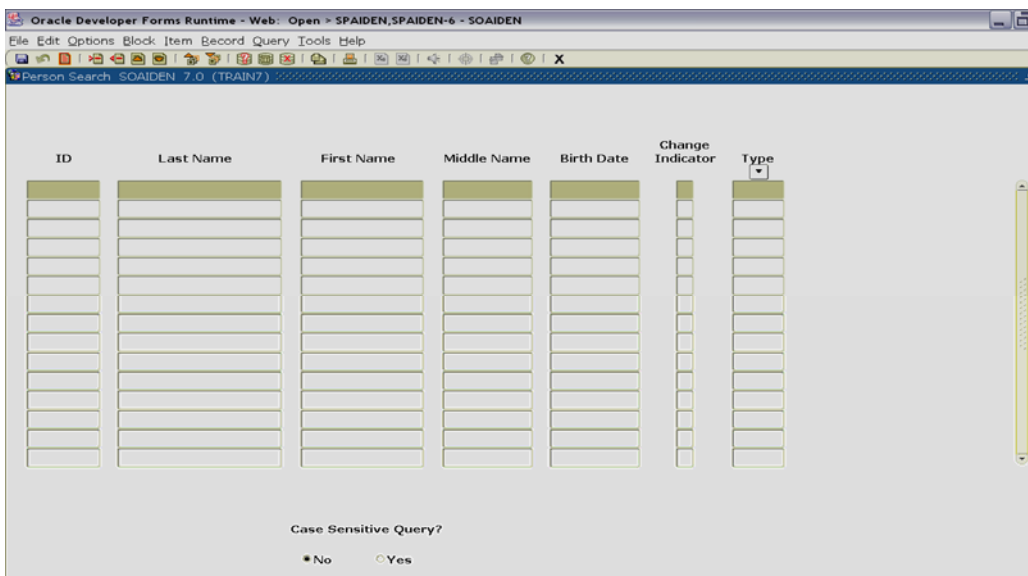
1. Click the **Search** icon (**down arrow**) next to the ID field to access the Person Search Form (**SOAIDEN**).



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



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



## Searching for a Student

### *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

The screenshot shows a software interface for viewing a student's class schedule. At the top, there is a menu bar with options: File, Edit, Options, Block, Item, Record, Query, Tools, Help. Below the menu bar is a toolbar with various icons. The main window title is "Registration Query SFAREGQ 7.2 (BANTEST7)".

At the top of the form, there are input fields for "Term:", "Registration From Date:", and "Registration To Date:". Below these are "ID:" and a search icon.

The main body of the form is a table with columns: Term, CRN, Subject, Course, Section, Registration Status, CEU, Cross List, Mon, Tue, Wed, Thu, Fri, Sat, Sun, Begin Time, and End Time. There are three rows of data, each with a "Primary" checkbox.

Below the table, there are fields for "Part of Term:", "Campus:", "Start Date:", "End Date:", "Grading Mode:", "Building:", "Room:", "Instructor:", and "Instructional Method:". At the bottom, there are fields for "Co-op Education:", "Total Credit Hours:", and "Total CEU Hours:".

1. Access the Registration Query form (**SFAREGQ**) 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).
  - You **do not** need to enter any information in the Registration Date Range fields.
4. Perform a **Next Block**.
  - The student's class schedule will be displayed in the Information block.
  - Use the scroll bar to the right of the form for additional information.
  - In the **Registration Status** field, the following codes may appear (the **first** letter denotes):
    - R – Registered
    - D – Dropped
    - W - Withdrawn
5. To view another student or term, 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**).



## Viewing a Student's Registration Audit Trail

Student Course Registration Audit - SFASTCA 7.0 (BANTEST7)

Term Code:  Registration From Date:  Registration To Date:   
ID:

Sequence Number	Term	CRN	Subject	Course	Section	Campus	Level	Grading Mode	Credit Hours	Bill Hours	Source
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Course Status	Status Date	Add Date	Message			User	Activity Date	Error Flag			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>	<input type="text"/>			

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 **Course Status** field the following codes may appear:
    - **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 software window titled "Hold Information SOAHOLD 7.3 (BANTEST7)". At the top, there is an "ID:" label followed by a dropdown menu and a text input field. Below this is a section titled "Hold Details". The form contains several fields: "Hold Type:" with a dropdown, "Amount:" with a text input, "From:" with a date picker icon, "Reason:" with a text input, "To:" with a date picker icon, "Origination Code:" with a dropdown, and "Release Indicator" with a checkbox and a text input. A vertical scrollbar is visible on the right side of the form area.

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 determines the date the hold was placed.
  - The "**To**" date determines when the hold is no longer active.
  - 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 2-3.
6. To return to the General Menu, click **Exit** icon (or **Ctrl-Q**).

*To query a specific hold type:*

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

## Viewing a Student's Comments

The screenshot shows a web application window titled 'Person Comment - SPACMNT / 7.2.1.1 (BANTEST7)'. At the top, there is an 'ID:' field with a search icon. Below this, there are several sections: 'Comment Type' with a dropdown menu, 'Originator' with a dropdown, 'Contact' with a dropdown and a search icon, and 'Contact Date' with a date field. To the right, there is an 'Appointments' section with 'From Time' and 'To Time' fields, and a 'Confidentiality' checkbox. Further right are 'Add Date', 'Activity Date', and 'Last Updated by' fields. The main area contains two large text input fields: 'Comments' and 'Narrative Comments', both with scroll bars on their right sides.

- A. Access the Person Comment form (**SPACMNT**) from the General Menu.
- B. 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).
- C. 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.
- D. To view another student, click the **Rollback** icon (or **Shift-F7**) and repeat steps 2 and 3.
- E. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

### *Entering a comment:*

1. Perform steps B and C.
2. Click the **Insert Record** icon (or **shift F6**).
3. In the **Comment Type** field, enter the comment type (double-click in the **Comment Type** field for a list of values).
4. Place the cursor in the **Comments** field and type the comment.
  - Please include your name at the end of your comment, to ensure accountability.
5. Click the **Save** icon (or **F10**).

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

1. Perform steps B and C.
2. Enter query by clicking the **Enter Query** icon (or **F7**).
3. In the **Comment Type** field, enter the comment type to query (double-click in the **Comment Type** field for a list of values).
4. Execute the query with the **Execute Query** icon (or **F8**).

# Viewing a Student's Academic History

## 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 **Grading 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**).

## 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 GPA and Course Detail Information SHATERM 7.3 (BANTEST7)

**Term GPA**

Institution or Transfer:  Transfer Number:  Attendance Period:

Term:	Attempted Hours	Passed Hours	Earned Hours	GPA Hours	Quality Points	GPA
200480	6.000	6.000	6.000	6.000	21.00	3.500
<b>Cumulative:</b>	6.000	6.000	6.000	6.000	21.00	3.500

**Institutional Courses**

Subject	Course	Title	Grade	Mode	Hours	Repeat	Campus
MBAD	6121	Business Info Systems	A	S	3.000	<input type="checkbox"/>	<input type="checkbox"/>
ITIS	6200	Prin Of Info Sec & Priv	B	S	3.000	<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"/>

### 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 **Course Level Codes by Person** 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 listed first, followed by transfer credit.
  - 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:	ITCS					
	Attempted Hours	Passed Hours	Earned Hours	GPA Hours	Quality Points	GPA
Institution:	3.000	3.000	3.000	3.000	12.00	4.000
Transfer:	.000	.000	.000	.000	.00	.000
Total:	3.000	3.000	3.000	3.000	12.00	4.000

Institutional Courses								
Term	Subject	Course	Title	Grade	Mode	Hours	Repeat	Campus
200610	ITCS	6010	Intelligent Tutoring Systems	A	S	3.000	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>

Transfer Courses								
Term	Subject	Course	Title	Grade	Mode	Hours	Count in GPA	Repeat
							<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>

### 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 another **Next Block** to navigate back to the **SHASUBJ** 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

Term:  CRN:

**Section Details**

Subject:  CEU Indicator:

Course Number:  Title:  Credit Hours:

Section:  Billing Hours:

Cross List:  Contact Hours:

Campus:  Lecture:

Status:  Lab:

Schedule Type:  Other:

Instructional Method:  Link Identifier:

Integration Partner:  Attendance Method:

Grade Mode:  Weekly Contact Hours:

Session:  Daily Contact Hours:

Special Approval:

Duration:

Part of Term:

Registration Dates:

Start Dates:

Maximum Extensions:

Long Title  Comments  Syllabus

Print  Voice Response and Self-Service Available

Gradable  CAPP Areas for Prerequisites

Tuition and Fee Waiver

1. Access the Schedule form (**SSASECT**) from the General Menu.
2. In the **Term** field, enter the term code you wish to view and then press the **tab** key.
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 **Next 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 to view additional information.
- Perform a **Previous Block (Ctrl-Page Up)** 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 (Ctrl-Pg Up) two times** to return to the Schedule Form.

5. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).

## Searching for a Section

The screenshot shows the 'Schedule Section Query Form SSASECQ 7.0 (BANTEST7)'. The form is organized into two identical panels. The top panel has a yellow header bar. Each panel contains the following fields and controls:

- Top Row:** Term (dropdown), Part of Term (dropdown), Registration From (calendar), Registration To (calendar), CRN (text), Block Schedule (checkbox), Subject (dropdown), Course (text), Section (text), Section Status (dropdown), Campus (dropdown).
- Second Row:** Course/Section Title (text), Schedule Type (dropdown), Instructional Method (dropdown), Duration (text), Unit (dropdown).
- Bottom Row:** Link (checkbox), Cross List (checkbox), Reserved Seats (checkbox), Long (checkbox), Syllabus (checkbox), Comments (checkbox), Enrollment: Maximum (text) - Actual (text) = (text), Waitlist: Maximum (text) - Actual (text) = (text).

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

## Viewing a Class List for a Section

Class Roster SFASLST 7.3 (BANTEST7)

Term:  CRN:   Roll Degree Award Status:

Sequence	ID	Name	Status	Status Date	Midterm Grade	Final Grade	Grade Mode	Rolled	Hours
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Grade Comment: <input type="text"/>									
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Grade Comment: <input type="text"/>									
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Grade Comment: <input type="text"/>									
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Grade Comment: <input type="text"/>									
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Grade Comment: <input type="text"/>									

1. Access the Class Roster form (**SFASLST**) from the General Menu.
2. In the **Term** field, enter the term code.
3. Enter the **CRN** (Course Reference Number) of the section in the **CRN** field.
  - a. If you do not know the **CRN** of the section, click the **Search** icon in the **Course Reference Number** and choose **Section Query** from the pop-up box.
  - 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, and the CRN will be entered on the **SFASLST** form.
4. Perform a **Next Block** to display the class list for that section.
  - Use the scroll bar at the bottom of the form or the down arrow key to view additional information.
  - This form also displays midterm and final grades (if any have been entered).
5. To return to the General Menu, click the **Exit** icon (or **Ctrl-Q**).