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# Student Lifecycle Management Overview SLCM\_200



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## Course Content



This course is intended as an introduction to Student Lifecycle Management for all SLCM Users. Content includes the Student Administration Portal and IRIS SAPGUI (SAP Graphical User Interface), the Student File tabs, the Student Master Data tabs, and information about academic years and sessions.

- Introduction
- Unit 1 – Student Administration
- Unit 2 – Student File
- Unit 3 – Student Master Data
- Course Summary

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## Learning Objectives



- Upon completing this course, you will be able to:
  - Understand the integration of SLCM processes with each other and with other IRIS functions,
  - Understand the Student Administration tab on the myUK portal,
  - Navigate the Student File tabs,
  - Navigate Student Master Data tabs.



**Note:** The student data used in this course is not real University student data. It has been specially created for training.

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## SLCM\_200 Exercises



- After the course, you can practice viewing employee data in the [Training Sandbox](#).
- Click on the button below and print the [SLCM\\_200 Practice Guide](#) pdf
  - **Note:** The Practice Guide will open in a new window.


SLCM\_200 Practice Guide

- Go to the [Training Sandbox](#) and follow the directions in the practice guide




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## SLCM Introduction




- SLCM is the Student Lifecycle Management module within IRIS that includes:
  - Admissions
  - Registration
  - Majors/Minors/Options
  - Academic History
  - Enrollment Information
  - Accounts Management
  - Other Student Services





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## Integration Across IRIS




- SLCM data integrates with other IRIS modules.
  - **Student Number** is integrated with HR **Person ID**.
    - If a student is also an employee the **Student Number** and the employee **Person ID** will be the same.
  - Student Accounts are integrated with the Financial module.




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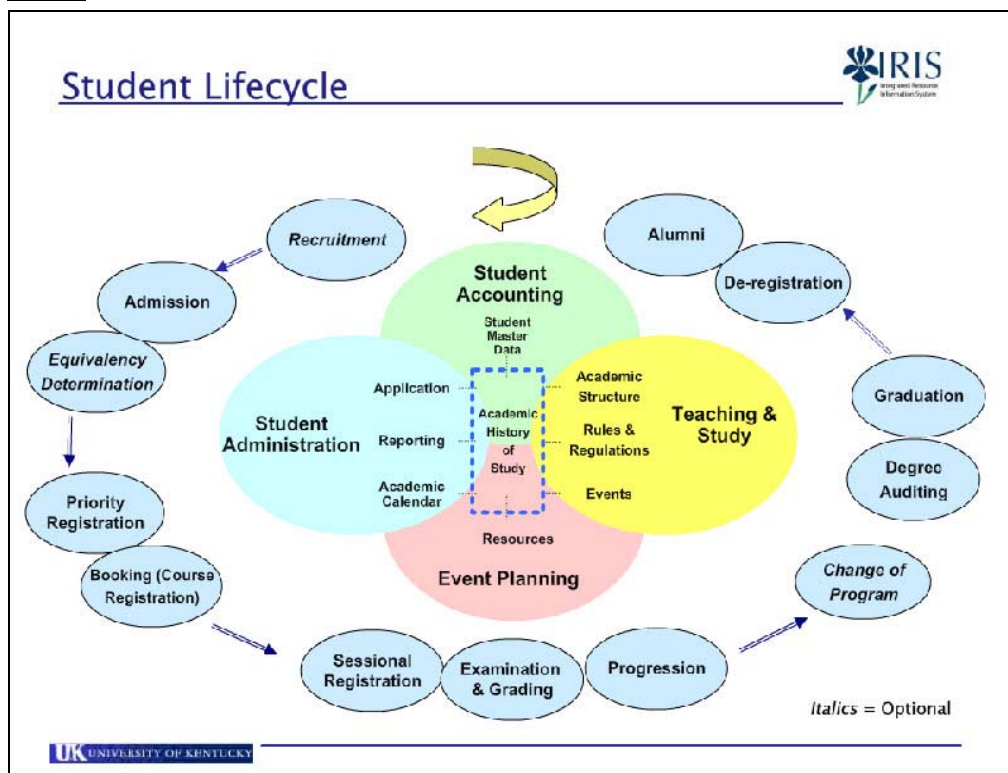
**Student Lifecycle** 

- There are four areas in the SLCM Module:
  - Student Accounting
  - Student Administration
  - Teaching and Study
  - Event Planning
  
- The Student Lifecycle diagram (next screen) shows the progression of the student's records and the relationship with IRIS SLCM module areas throughout the student's association with the University.





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#### SLCM Access and Roles



- In order to access SLCM data, the user needs:
  - To successfully complete this course;
    - Access to certain *Student Administration* subtabs and to the *IRIS* SAPGUI may require completing more than one course.
  - To be designated as a person who displays student records and have a College Contact approved training plan;
  - To sign the *Statement of Responsibility (SOR)*.
    - Instructions are available on the *myHelp* website or in the **UK\_100** course.
    - If you have signed the *SOR* in **UK\_100**, you do not need to sign it a second time.
- If you do not have access, please work with your College Contact to get this access assigned.
  - The College Contact list is located on the *Student Lifecycle Management* Information page on the *IRIS* website.

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#### SLCM Access and Roles



- Your **SLCM\_200** role provides you with access to the *Student Administration* tab on the *myUK* portal.
  - This access is the most common SLCM access given on campus.
  - Access to some of the subtabs may be tied to other roles.



- **Note:** If you find you need more access, check with your College Contact. You may need to take more SLCM courses for greater access within the system.
- **Note:** You will **not** receive access to all the transactions demonstrated in this overview, especially those shown in the *IRIS* system through the transaction **PIQST00**.

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## Academic Calendar



- The Academic Calendar runs from the fall session through the second summer session.
- Example: Academic Year 2013 consists of the following sessions:

Session	Calendar Year	Academic Year Code	Academic Session Code
Fall	2012	2013	10
Winter	2012	2013	20
Spring	2013	2013	30
Summer 1	2013	2013	51
Summer 2	2013	2013	52
Full (CEU)	2012-2013	2013	99

- It can be viewed through the [Student Administration](#) portal or in the [IRIS](#) SAPGUI production system.

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## FERPA




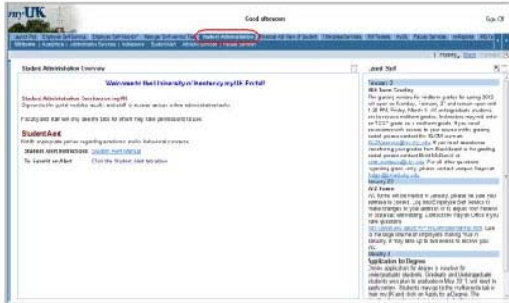
- When you access a student's record, a FERPA (Family Educational Rights and Privacy Act) message may appear.




- **Absolutely no information can be released** on this student unless the student presents a picture ID.

# Unit 1





# Student Administration Tab



## Student Administration Tab




- The **Student Administration** tab is the easiest way for staff and faculty to access basic SLCM information.
  - However, not all activities can be handled using the **Student Administration** tab; some activities can only be completed using **IRIS** production.
- You will **ONLY** see tabs and links for applications for which you have permission.
- The **Student Administration** tab contains subtabs:
  - Academics
  - Administrative Services
  - Admissions
  - Advising Services
  - Faculty Services




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## Student Administration Tab




- The **Student Administration** tab is used to:
  - Display a student profile (directory information),
  - Display student schedule,
  - Display course offerings,
  - Display/print real-time class rolls,
  - Submit midterm and final grades,
  - Display unofficial transcript,
  - Display list of advisees,
  - Lift academic advisor holds,
  - Issue electronic course overrides (permissions),
  - Perform administrative booking (course registration).





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## Student Administration News



- Up to date news items display on the right side of the **Student Administration** screen under **Latest Stuff**.
- News can include
  - Registration windows,
  - Grading windows,
  - System outages,
  - Recent changes





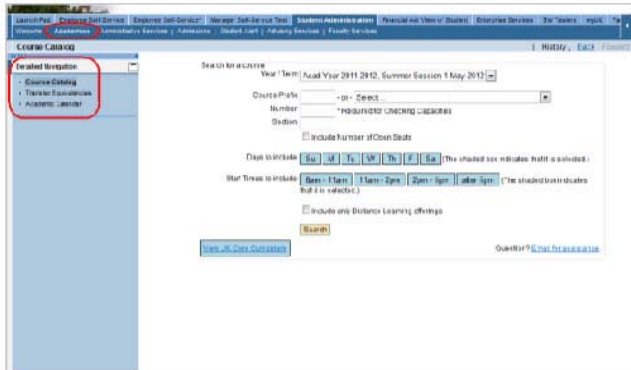


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## Academics Tab



- The **Academics** tab includes:
  - Course Catalog
  - Transfer Equivalencies
  - Academic Calendar



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## Administrative Services Tab




- The **Administrative Services** tab includes:
  - College Reports
    - College Reports
  - Registrar
    - Course Instructor Management
    - Booking Rules
    - Course Capacities
    - Historical Course Changes
    - Override Permissions
    - Course Cache Update
  - Administrators
    - Assign Student Overrides
    - Degree Processing
    - Course Capacities
    - Booking Rules

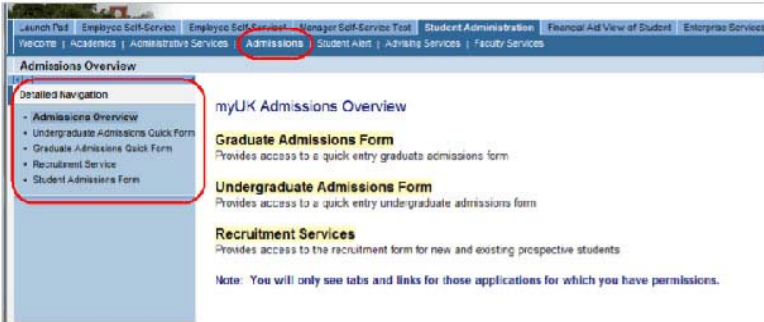


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## Admissions Tab




- The **Admissions** tab includes:
  - Admissions Overview
  - Undergraduate Admissions Quick Form
  - Graduate Admissions Quick Form
  - Recruitment Service
  - Student Admissions Form



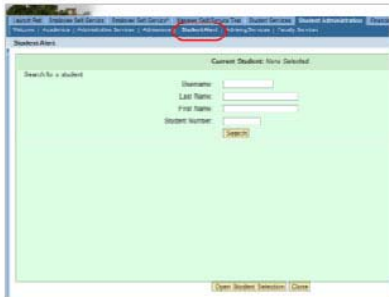
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## Student Alert Tab



- The **Student Alert** tab includes:
  - Ability to identify “at risk” students who may need immediate help
  - Ability to track patterns such as absences, disruptive behavior, etc.
  - Information is shared between faculty, advisors, counselors, and Students of Concern committee members in order to increase the effectiveness of the targeted intervention mechanisms



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## Advising Services Tab



- The **Advising Services** tab includes:
  - Advising Services Overview
  - Advisee Record
  - Historical Course Changes
  - Unofficial Transcript
  - Registration
    - Admin Booking
    - Course Catalog
    - Assign Student Overrides
  - Appointment Manager
  - Appointment Scheduler
  - Degree Planner (APEX)
    - Degree Planner (APEX)
    - Help
    - Tutorials
  - Print Student Schedule
  - Transfer Equivalencies

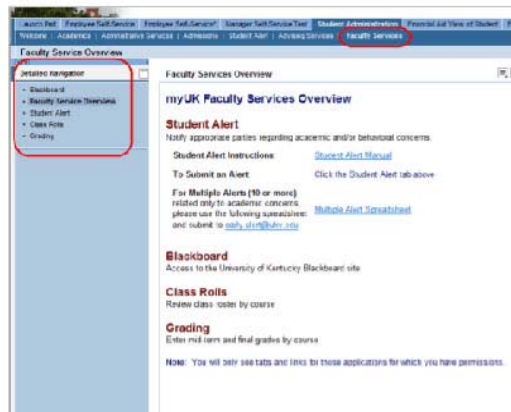


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## Faculty Services Tab




- The **Faculty Services** tab includes
  - Blackboard
  - Faculty Services Overview
  - Student Alert
  - Class Rolls
  - Grading

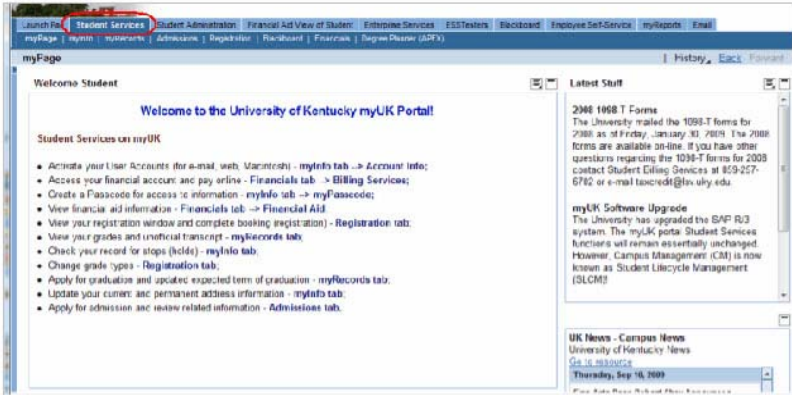



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## Student Services Tab




- Students access their records via the **Student Services** tab.






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## Student Services Tab



- Student access includes:
  - Applying for admission and reviewing related information,
  - Updating their current and permanent address,
  - Activating their user accounts (email, web, etc.),
  - Accessing their financial account and making online payments,
  - Creating a pass code for information access,
  - Displaying financial aid information,
  - Displaying their registration window,
  - Booking courses,
  - Displaying grades,
  - Checking for holds,
  - Applying for graduation and updating expected graduation date,
  - Applying for admission and reviewing related information,
  - Updating their current and permanent address.



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# Unit 1

## Check for Understanding



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# Unit 2




# Student File




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## Student File




- **Student File** records (found in the **PIQST00** transaction) are created when UK receives applications, test scores, transcripts, etc.
- The **Student File** screen contains information about the **student's relationship with UK**, including:
  - Holds
  - Majors/Minors/Options
  - Admission
  - Registration
  - Academic Standing
  - Advisor


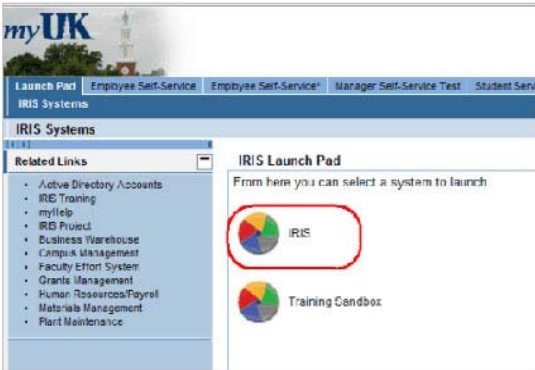


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## SLCM Access and Roles




- **Reminder:** You will **not** receive access in your **SLCM\_200** role to all the transactions demonstrated in the **IRIS R/3** system through the transaction **PIQST00**, such as viewing the **Student File** and **Student Master Data** records.


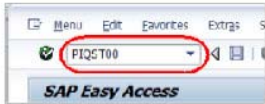


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## PIQST00




- PIQST00 is used to view both **Student File** and **Student Master Data** records.
- Enter **PIQST00** in the command field and press **Enter**
- Add **PIQST00** to your favorites (preferred by most users)



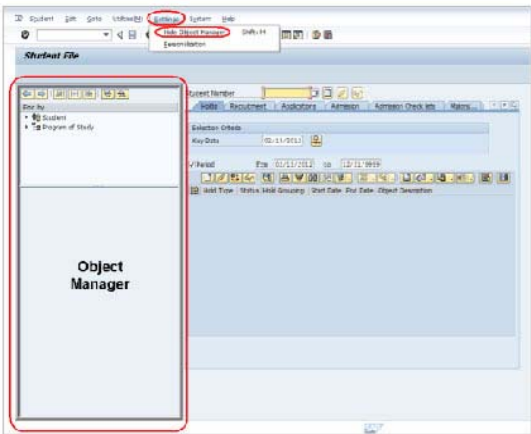
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## PIQST00 Student File



- The **Object Manager** displays on the left side of the screen.
  - Most users do not use this feature.
  - To close, use the menu **Settings** → **Hide Object Manager**.
- The student's academic records display on the right side of the screen.



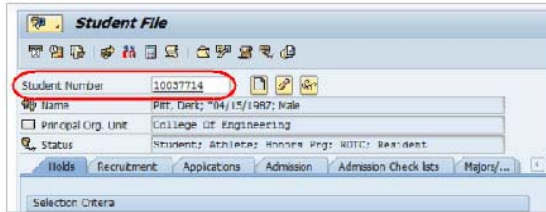
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## Student Number



- The **Student Number** is a **unique** 8-digit ID number assigned to each student by the IRIS system.



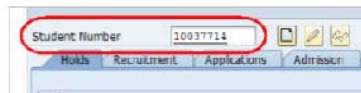
- The **Student Number** is the key to student records and is used instead of the SSN (Social Security Number).
  - UK maintains the SSN, if known, so you will be able to **search** by SSN, if necessary, using the **ID Number** field.

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## Student Search

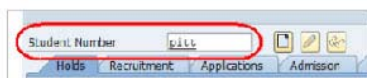


- There are three ways to pull up a student's records.
  - Enter the student's ID in the **Student Number** field



OR

- Enter the student's last name in the **Student Number** field, press **Enter**, and then double-click on the student's name in the search screen



Object e...	Object name	Start date	End Date
10002553	Petman, Adam	01/01/1988	12/31/0000
10037714	PET, Derek	01/01/1988	12/31/0000
10037715	PET, Eric	01/01/1988	12/31/9999
10037716	PET, Kylie	01/01/1988	12/31/0000
10037850	PITT, DEREK	01/01/1988	12/31/9999



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## Student Search



OR

- Click on the **Possible Entries** icon in the **Student Number** field, enter the student's last name, first name, and/or **ID number** (SSN) on the **Personal Data** tab, press **Enter**, and then double-click on the student's name



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## FERPA



- Students may place privacy flags on their records which indicate that the student has restricted directory information under the Family Educational Rights and Privacy Act (FERPA).
- When the records are accessed, the **Data Privacy Warning (FERPA)** window displays.



- Close the window by clicking on the **Continue** icon or pressing **Enter**



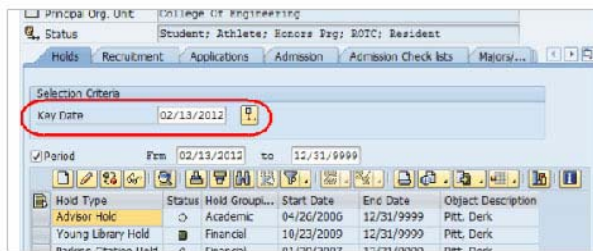
- If this message displays, no information can be released on this student, not even to the student unless the student provides picture ID.

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## Key Date



- The **Key Date** is the date as of which IRIS displays, processes, or creates student data.
- The **Key Date**
  - Determines what data you can see,
  - Defaults to the current date (recommended default setting),
  - Can be changed by typing a new date into the field.

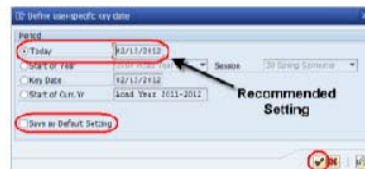
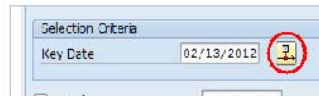


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## Key Date



- To change the **Key Date** field, either enter the date in the field or click on the **Define Key Date** icon.
- Choices include:
  - Today
  - Start of Year – Academic Year and Session
  - Key Date – Defaults to current date
  - Start of Curr. Yr – Start of the current Academic Year
- Click on **Continue** to close the window

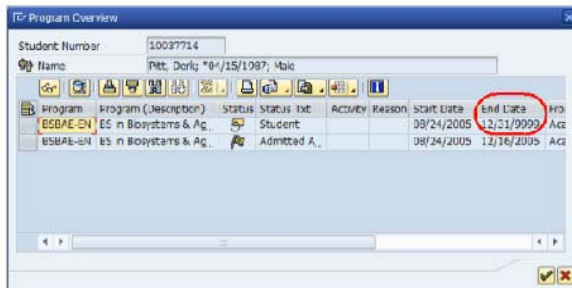


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High Date

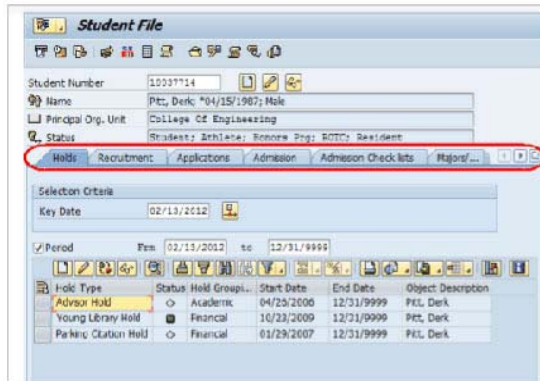


- Another important date is the system **High Date** which is the default validity end date of 12/31/9999.
- This default **End Date** stretches far into the future, to keep the validity of a record or action from being delimited (ended) prematurely.



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Student File



- Numerous tabs display student academic work.
- Your role will determine the information you are able to display and/or change.

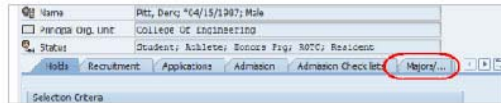
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## Tab Navigation

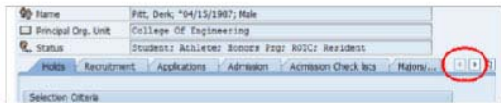


- There are three ways to navigate tabs.

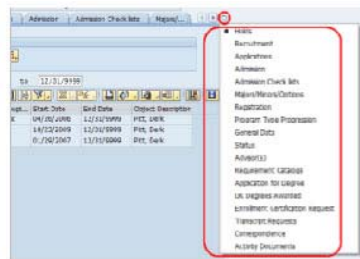
- Click on the tab



- Click on the Next or Previous icons



- Click on the Tab List icon and then the tab name



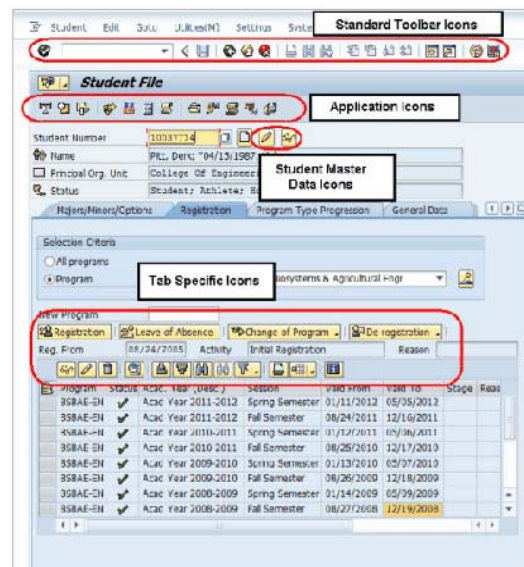
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## PIQST00




- Three types of icons exist on PIQST00 Student File:
  - Application icons,
  - Student Master Data icons,
  - Tab specific icons.

- Access to specific icons also is determined by your role in the system.





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## PIQST00- Application Icons




- End user icons include:
  - Account Balance
    - The **Account Balance** icon displays open (unpaid) student account data.
  - Academic Work Overview
    - The **Academic Work Overview** icon displays student's academic work.
  - Note Overview
    - The **Note Overview** icon displays any notes placed on the student's records, such as advising, admissions, registrar, etc.

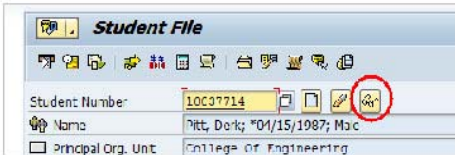




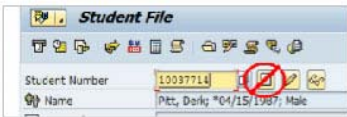
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## PIQST00 - Student Master Data Icons





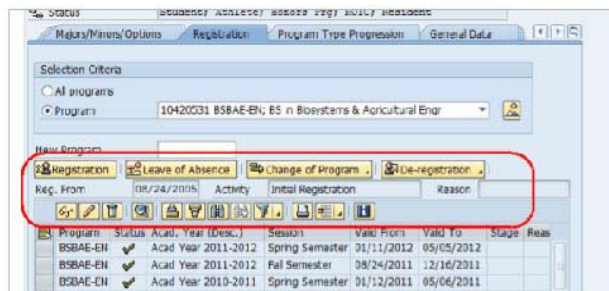
- Use the **Display** icon to navigate to the **Student Master Data** screen.
  - Once on the **Student Master Data** screen, a **Change/Display** toggle will allow you to switch to change mode.
  - **Do not** use the **Create** icon, since it will create a new student in the system.





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## PIQST00 – Tab Specific Icons



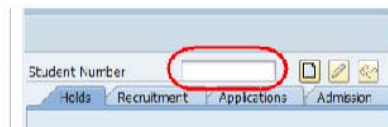
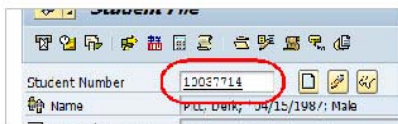
- Each tab contains icons specific to the records on the tab.
- Example:
  - Icons on the **Registration** tab are used to create, display, and change programs of study.

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## Student File – Tips



- Make sure you are in the **correct** student file!
  - After you select or type a new **Student Number**, press **Enter** to populate the **Student File** fields.
  - Check the name and other information that populates the **Student File** screen **before** you begin working with the data.
- Clear the fields **before** entering a student's number in the **Student Number** field by highlighting the number, pressing **Delete**, and then pressing **Enter**.

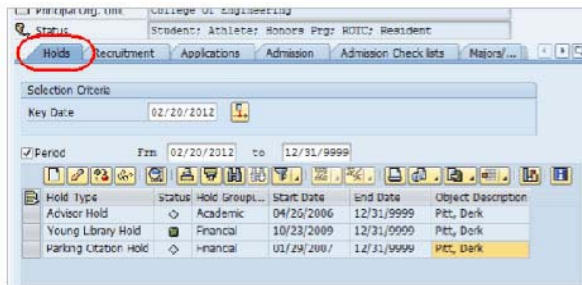


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## Student File – Holds





- Holds can block the processing of certain activities for a student, such as registration, admission, etc.
- The hold information can be viewed in the *myUK* portal.
  - Only Advisor holds can be inactivated using the portal.
- Holds also can be viewed, created, and/or inactivated in the *IRIS* SAPGUI interface (*IRIS* Production system) on the **Holds** tab.

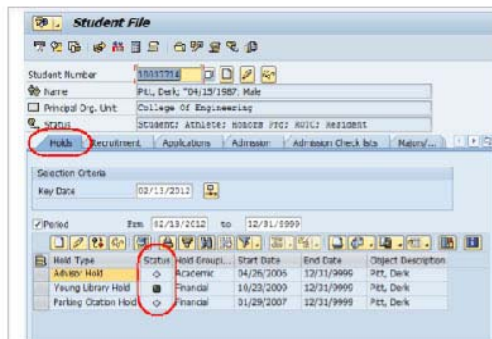


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## Student File – Holds



- The **Status** field displays whether the hold is active or inactive.
  - A green square indicates an active hold. 
  - A gray diamond indicates an inactive hold (a historical record). 

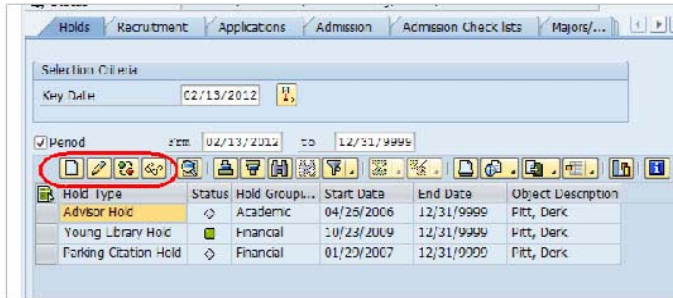


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## Student File – Holds



- Icons on the **Holds** tab are used to:
  - Create a hold,
  - Change a hold,
  - Inactivate a hold,
  - View a hold.

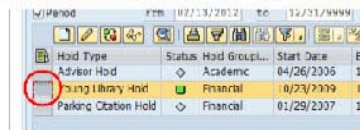


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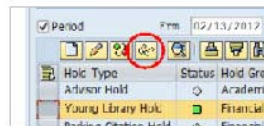
## Student File – Holds



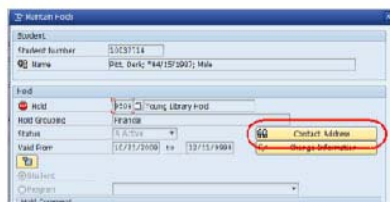
- To display information about a hold, click on the **Select** icon to the left of the hold.



- Click on **Display**




- Click on **Contact Address** to see who to contact to release the hold





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## Student File – Holds



- To close the data windows, click on **Continue** or press **Enter**

Contact Address

Young Library Bldg - Cell 237-0500 ext. 2067

Student Hold

Student Number: 10017714

Name: HIG, DANC "DAVID" (1987) RAB


Hold: 0101 Young Library Hold

Hold Grouping: Freshman

Status: In Active


JOB YEAR: 10/43/2008 to 11/21/2008

Buttons: Contact Address, Change Information

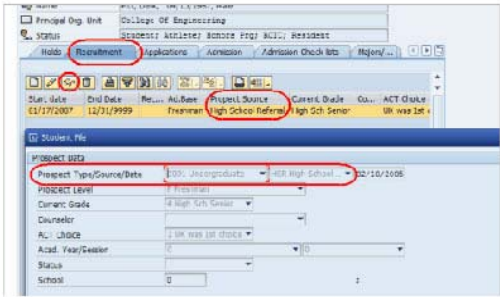



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## Student File – Recruitment



- Recruitment** information may be entered either
  - Manually, such as when a student attends a UK event,
  - Or automatically, such as when UK receives a test score, etc.
- Information contains **Type** (Undergrad, Grad) and **Source** (Application, Alumni Recruitment, etc.).



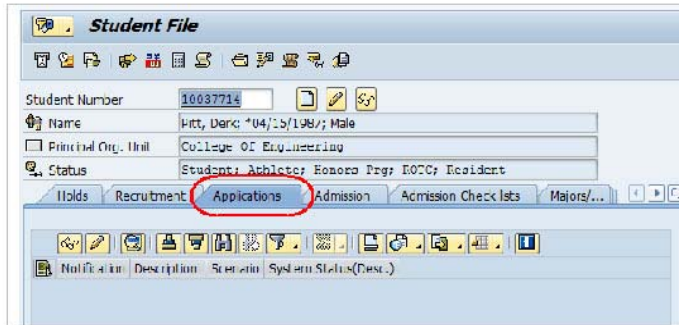


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## Student File – Applications



- The **Applications** tab contains records pertaining to UK admissions applications including:
  - Notification number,
  - Description,
  - System Status.

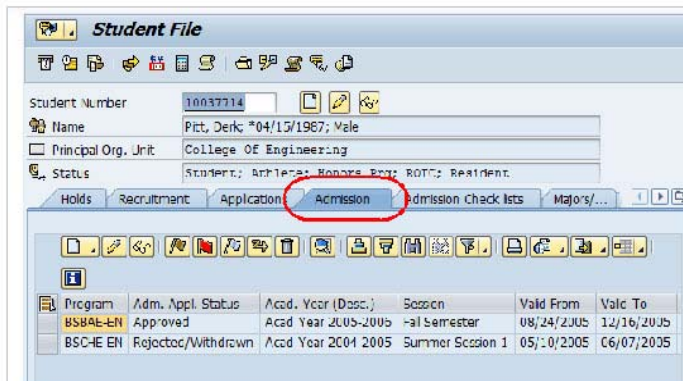


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## Student File – Admission



- The **Admission** tab contains admission information to UK including
  - Program of Study,
  - Application Status,
  - Academic Year, etc.

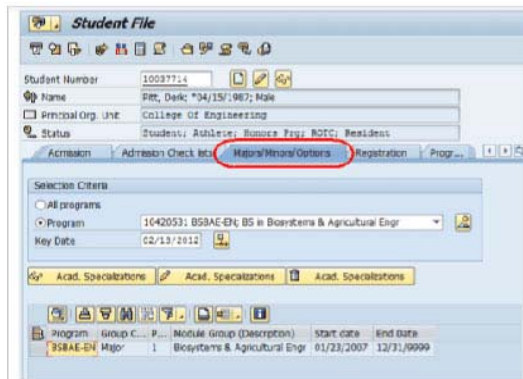


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## Student File – Majors/Minors/Options



- The **Majors/Minors/Options** tab contains the student's
  - Majors,
  - Minors,
  - Options, etc.,
  - Graduate area of study.

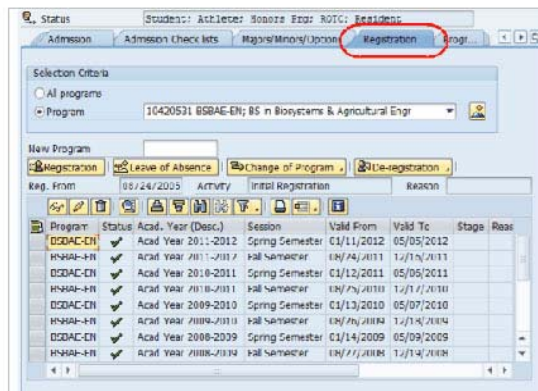


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## Student File – Registration



- The **Registration** tab populates automatically by the admission process and for each semester thereafter of continuous enrollment.
- It is updated by the receiving college if the student changes program of study.

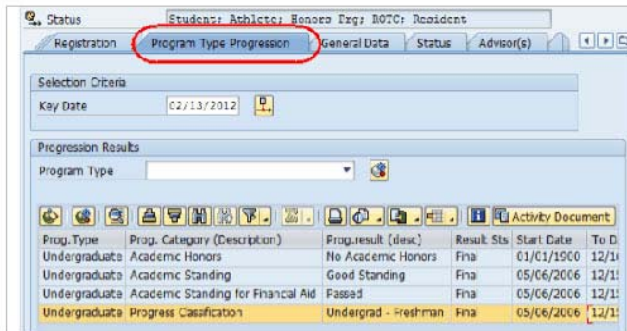


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## Student File – Program Type Progression



- The **Program Type Progression** tab contains progression records of the following:
  - Academic honors (Dean’s list, etc.),
  - Academic standing (good standing, probation, suspension, etc.),
  - Progression classification (freshman, sophomore, etc.).

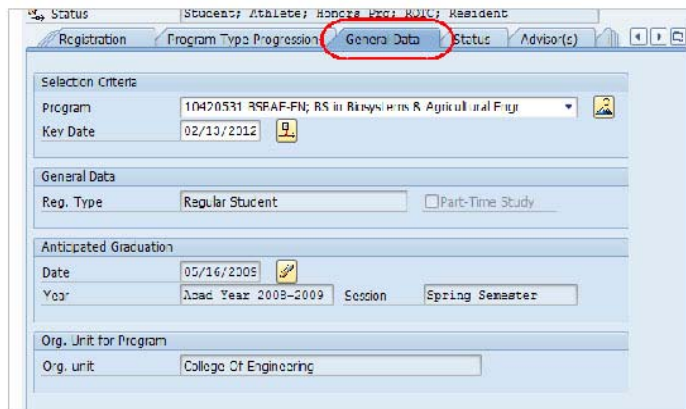


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## Student File – General Data



- The **General Data** tab contains general information including
  - Program of study,
  - Anticipated graduation date,
  - Organizational unit for the program, etc.

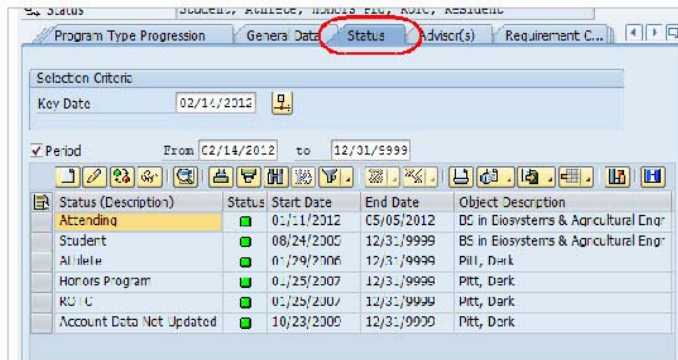


Slide60

## Student File – Status



- The **Status** tab contains student status information including:
  - Status (applicant, attending, etc.),
  - Valid from and to dates.

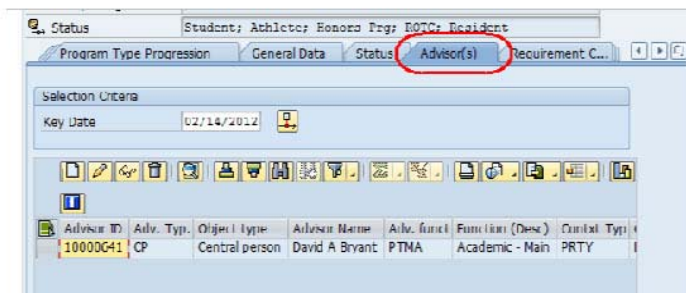


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## Student File – Advisor(s)



- The **Advisor(s)** tab contains student's advisor information including:
  - Advisor name,
  - Advisor function.

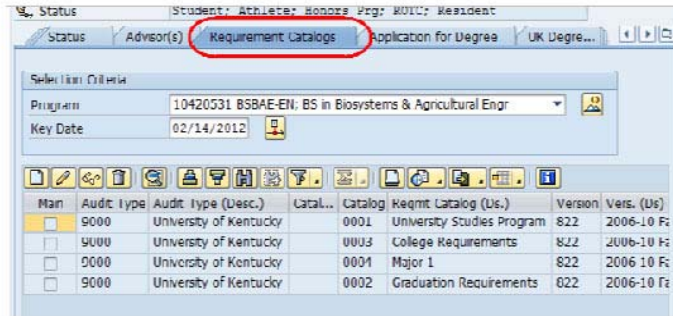


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## Student File – Requirement Catalogs



- The **Requirement Catalogs** tab contains information including
  - Audit Type,
  - Catalog,
  - Requirement Catalog,
  - Version, etc.

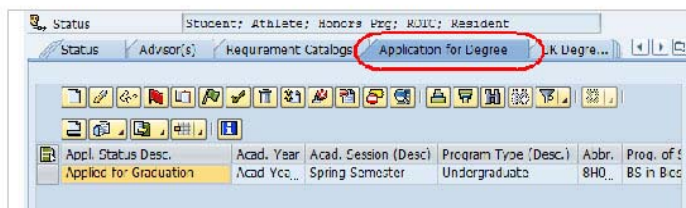


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## Student File – Application for Degree



- The **Application for Degree** tab contains records pertaining to applications for degrees including
  - Academic year,
  - Academic session,
  - Application status,
  - Program ID.

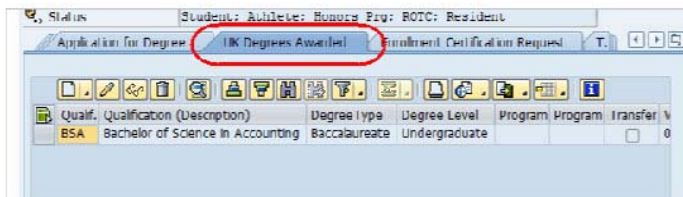


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## Student File – UK Degrees Awarded



- The **UK Degrees Awarded** tab contains UK degree information including:
  - Qualification (degree, certification, etc.),
  - Degree type,
  - Degree level,
  - Etc.

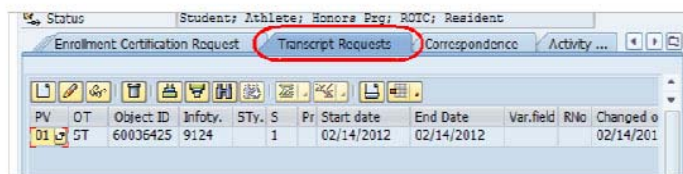


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## Student File – Transcript Requests



- The **Transcript Requests** tab contains information regarding requests for student transcripts, such as
  - Hold Until End of Semester,
  - Hold for Post Degree,
  - Hold for Processing of Repeat Option,
  - Etc.



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## Student File – Activity Documents



- The **Activity Documents** tab contains system records audit trail for student activities including:
  - Module Booking,
  - Change of Program,
  - Sessional Registration.

Activity (Desc.)	Reason	Program	Program (Description)	Cre
Confer Qualification				02/
Program Type Progression				02/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	01/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	08/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	11/
Sessional Registration		DSBAE-EN	ES in Biosystems & Agricultural Engr	05/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	10/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	02/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	04/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	04/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	04/
Sessional Registration		BSBAE-EN	ES in Biosystems & Agricultural Engr	04/
Module Booking				02/

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## Unit 2 Check for Understanding



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Unit 3




# Student Master Data

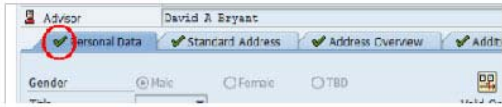
UK UNIVERSITY OF KENTUCKY

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Student Master Data



- The **Student Master Data** screen contains student's biographic and demographic information.
- Your authorization in the system will determine **which data you can access**.
- **Tip:** A green checkmark on the tab indicates it contains student information.



- **Reminder:** Unless you are making a change to a student's master data, remain in **Display** mode!
  - If you enter the **Student Master Data** screen in **Maintain** mode, you will lock that student's information and other users cannot change that student's data.

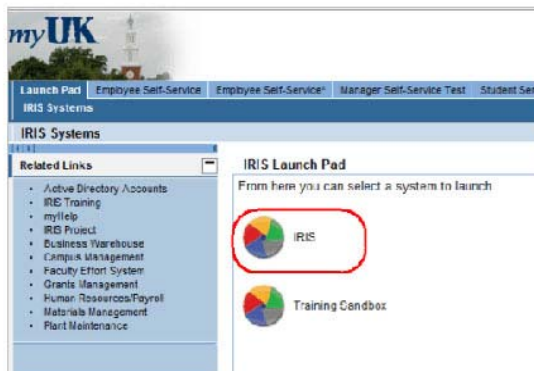
UK UNIVERSITY OF KENTUCKY

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## SLCM Access and Roles



- **Reminder:** You will **not** receive access in your **SLCM\_200** role to all the transactions demonstrated in the **IRIS** SAPGUI through the transaction **PIQST00**, such as viewing the **Student File** and **Student Master Data** records.



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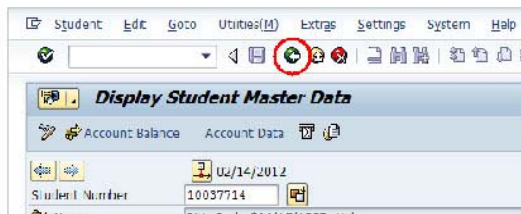
## Student Master Data



- To access the **Student Master Data** screen, go to **PIQST00**, then click on the **Display** icon to the right of **Student Number** field.



- To return to **Student File**, click on the **Back** icon.

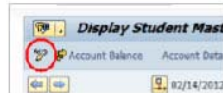


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## Student Master Data



- **Display/Change** toggle allows you to change from **Display** mode to **Maintain** mode.



- In **Display** mode, fields are gray and cannot be modified.

Street Address			
Street	5478 Greene Ave.		
City/State/ZIP Code	Lexington	KY	40512
Country	US	United States	Kentucky
Time zone	EST		

- In **Maintain** mode, modifiable fields are white.

Street Address			
Street	5478 Greene Ave.		
City/State/ZIP Code	Lexington	KY	40512
Country	US	United States	Kentucky
Time zone	EST		

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## Master Data – Personal Data



- The **Personal Data** tab contains information including
  - Gender,
  - Name,
  - ID Number (Social Security Number), if known,
  - Birth Date.

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## Master Data – Standard Address



- The **Standard Address** tab contains information including
  - House number and street,
  - City, state, and ZIP code,
  - Phone number,
  - Email address.

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## Master Data – Address Overview



- The **Address Overview** tab contains information is an overview which contains multiple addresses for the student including
  - Standard address,
  - Current address,
  - International address,
  - Permanent address.

Ch...	Address Description	Valid from	Valid To	Move
00	5478 Greense Ave. / Lexington KY 40512	01/01/0001	12/31/9999	
00	2158 Salabatto Ct. / Lexington KY 40515	01/01/0001	12/31/9999	

Address Hierarchy:

- Standard Address
  - 12/31/0001-12/31/9999 5478 Greense Ave. / Lexington KY 40512
- Current
  - 12/31/0001-12/31/0000 5478 Greense Ave. / Lexington KY 40512
- Permanent
  - 12/31/0001-12/31/0000 2158 Salabatto Ct. / Lexington KY 40515
- University Housing
- International

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## Master Data – Additional Data



- The **Additional Data** tab contains information including
  - Data privacy warning (FERPA),
  - Ethnic origin.

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## Master Data – Visa/Residence Data



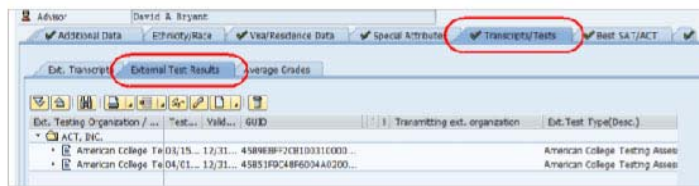
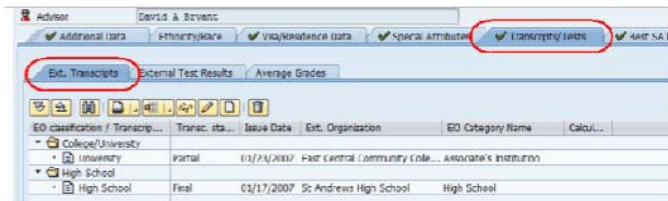
- The **Visa/Residence Data** tab contains information including
  - Resident status and country,
  - Passport number,
  - Visa type, number, country of issue, etc.

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## Master Data – Transcripts/Tests



- The **Transcripts/Tests** tab contains information including
  - Transcripts from external organizations (high school and/or college),
  - Tests from external sources.

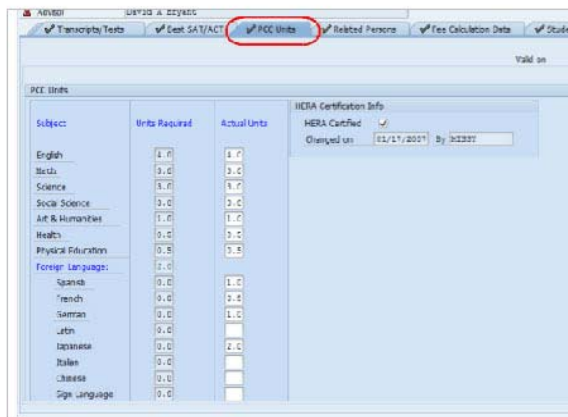


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## Master Data – PCC Units



- The **PCC Units** tab displays Pre-College Curriculum (PCC) credits (high school curriculum credits used for undergraduate admission).

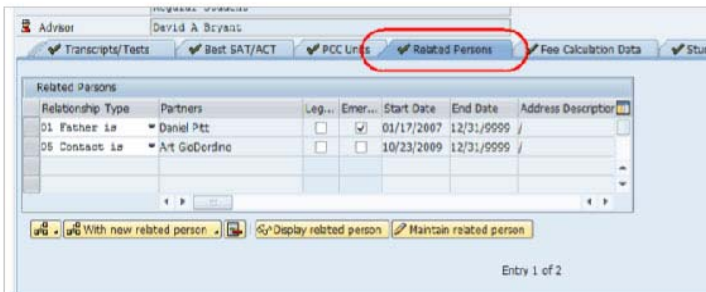


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## Master Data – Related Persons

- The **Related Persons** tab contains emergency contact(s) and other related person information including
  - Name,
  - Address,
  - Contact information.

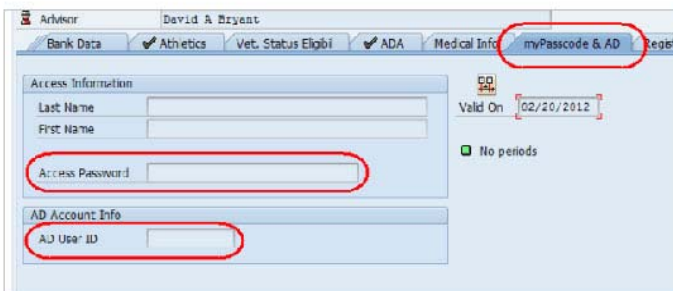


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## Master Data – myPasscode\_AD

- The **myPasscode\_AD** tab contains information including
  - Access Password,
  - AD user ID.



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## Unit 3

# Check for Understanding

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## Help Websites

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





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Course Summary




You are now able to:

- Understand the integration of SLCM processes with each other and with other IRIS functions
- Understand the Student Administration tab on the myUK portal
- Navigate the Student File tabs
- Navigate Student Master Data tabs



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Course Completion Instructions



- You can provide IRIS Training with feedback on this course by completing the [SLCM\\_200 Student Lifecycle Management Overview](#) course evaluation.
- Click on the button below to open the evaluation in a new window.

[SLCM\\_200 Course Evaluation](#)

Click the **Log Off** button to close the course and confirm your participation

