Student Lifecycle Management Overview
SLCM_200
Practice Guide

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SLCM_200 Practice Guide Overview

This Practice Guide is intended to accompany the SLCM_200 Student Lifecycle Management Overview Online Training Course. It provides all the procedures necessary to practice the demonstrations shown in the online course in the IRIS Training Sandbox.

This course is intended to give you a high level overall perspective of the Student Lifecycle Management module in the IRIS system and how to use the Display functionality to view a student's academic and master data records. Specific information covering creating and changing student records (including booking courses, releasing Advisor holds, grading), will be provided in the Level 300 courses listed in your training plan.

Please enter your answers to the various questions asked in the exercises in this Practice Guide using the online **SLCM_200 Exercises and Completion** form located at http://myhelp.uky.edu/rwd/HTML/CM/CM_200_Exercise_Notification.html and submit it to the IRIS Training.

If you would like to check each step as you complete it, a checkbox is included next to the step number for your convenience.

The SLCM_200 Campus Management Overview consists of the following components:

♦ SLCM_200 CM Overview Presentation

♦ SLCM_200 CM Overview Practice Guide

♦ SLCM_200 CM Overview Exercise and Completion Notification
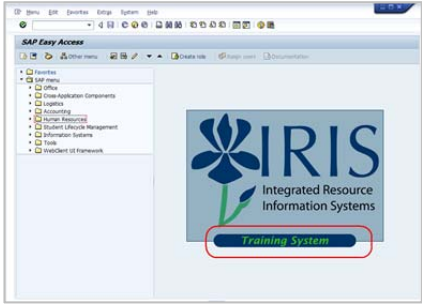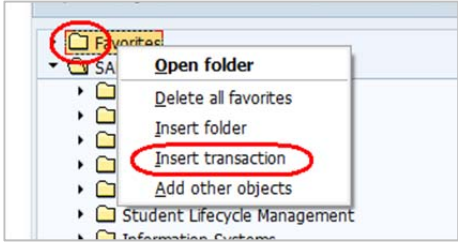
♦ SLCM_200 CM Overview Course Evaluation

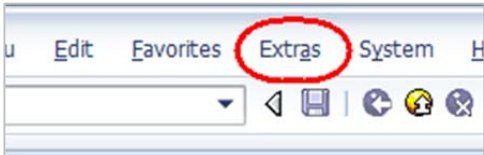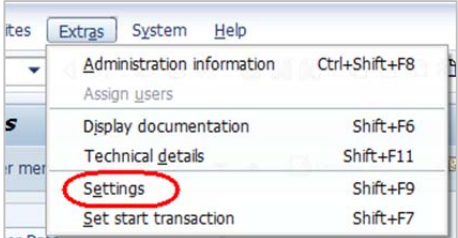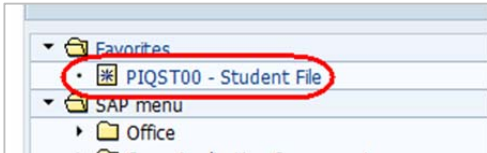The way to get comfortable with the IRIS system is through practice…practice…practice.
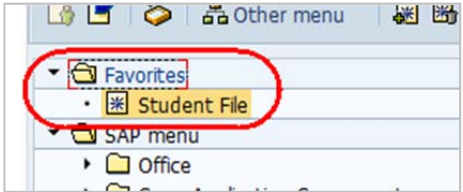
Remember the IRIS Training Sandbox is available 24/7 for you to practice the exercises contained in this practice guide as many times as you like.
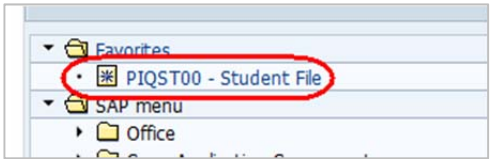
Exercise 1 – Logging into the IRIS Training Sandbox & Accessing PIQST00

Scenario

You wish to prepare to practice in the IRIS Training Sandbox. You will log into the **myUK** web portal and launch the IRIS Training Sandbox. You will then create a favorite for the exercises that follow.

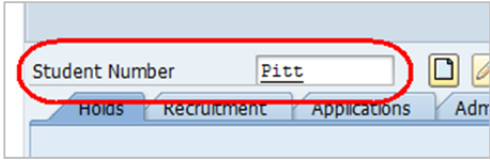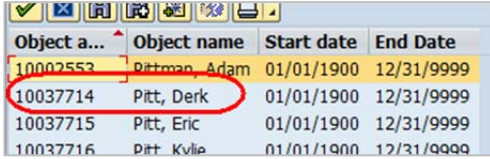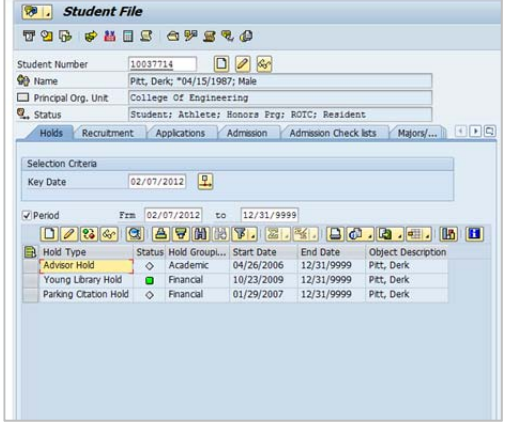| Logging into IRIS and Adding a Favorite		
1. ☐	Click **Launch Pad**	
2. ☐	When the **IRIS Launch Pad** appears, click on the **Training Sandbox** link	
3. ☐	The **IRIS Main Menu** will display **Note:** See **Figure 1: IRIS Main Menu** below **Exercise 1**	
Adding a Transaction to Your Favorites Folder		
4. ☐	To add a transaction to your **Favorites** folder, right-click on the **Favorites** folder and select **Insert Transaction** from the menu	

5. ☐	In the **Transaction Code** field, type **PIQST00**		
6. ☐	Press **Enter**		
7. ☐	Notice the transaction is now available in your **Favorites** folder		

Displaying the Technical Code in the Favorites Folder		
8. ☐	Using the **Menu Bar**, select **Extras**	
9. ☐	Click on **Settings**	
10. ☐	Select the **Display Technical Names** checkbox	
11. ☐	Press **Enter**	
12. ☐	Notice that the transaction code now appears with the name of the transaction	

13. ☐	To open the transaction, double-click on **PIQST00 – Student File**	

Exercise 2 – Searching For a Student – PIQST00

Scenario
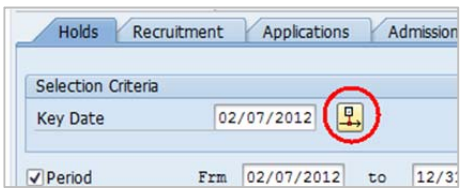
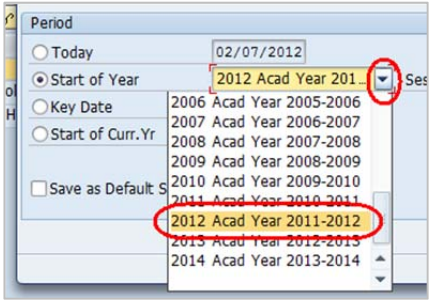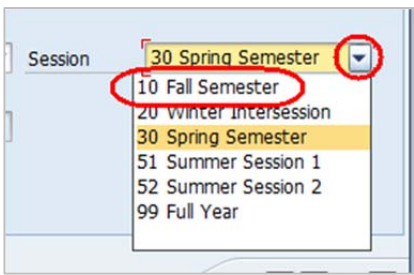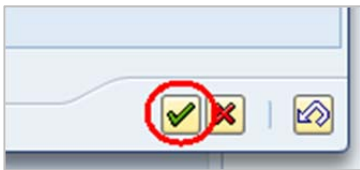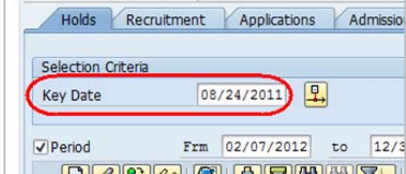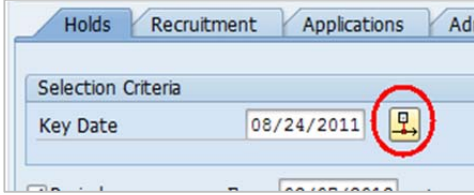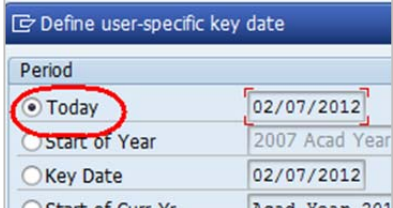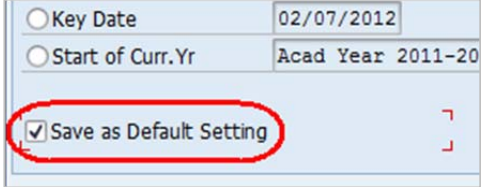You need to search for one of the students in your program of study.
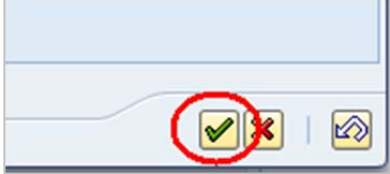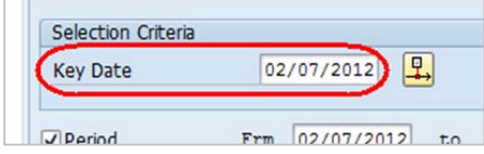
	Enter the Student File Screen	
1. ☐	In the **Student Number** field, enter **Pitt**	
2. ☐	Press **Enter** to search for the student	
3. ☐	When the search list appears, double-click on **10037714 Pitt, Derk**	
4. ☐	This student has placed a privacy flag on his records. To move past the **Data Privacy Warning** message, press **Enter**	
5. ☐	Notice that the student's records are now available	

Exercise 3 – Setting the Key Date – PIQST00

Scenario

You want to change the Key Date, and then set the current date as the default setting.

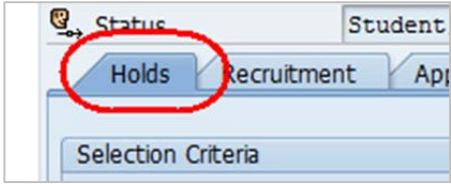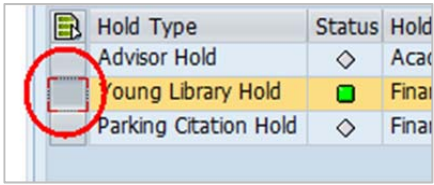| Enter the Student File Screen		
1. ☐	Click on the **Key Date** icon to the right of the **Key Date** field	
2. ☐	Click on the **Start of Year** radio button	
3. ☐	Click on the **Drop-down List** icon in the **Start of Year** field and select **2012 Acad Year 2011-2012**	
4. ☐	Click on the **Drop-down List** icon in the **Session** field and select **10 Fall Semester**	
5. ☐	Click on the **Enter** icon	
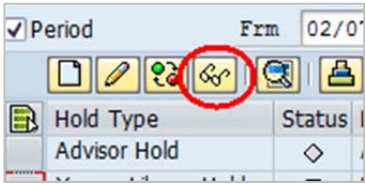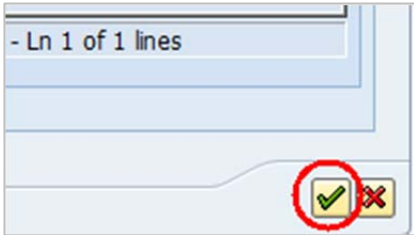
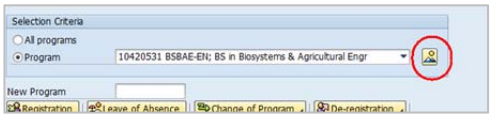|			
6. ☐	Notice that the **Key Date** field now contains the first day of the Fall 12 semester		
7. ☐	To make sure the default setting is the current date, click on the **Key Date** icon		
8. ☐	Verify that the **Today** radio button is selected		
9. ☐	Click in the **Save as Default Setting** checkbox		
10. ☐	Click on the **Enter** icon		
11. ☐	The **Key Date** field should contain the current date		
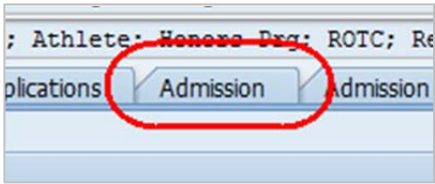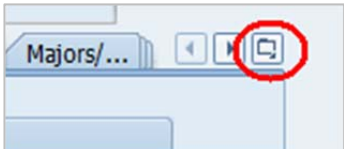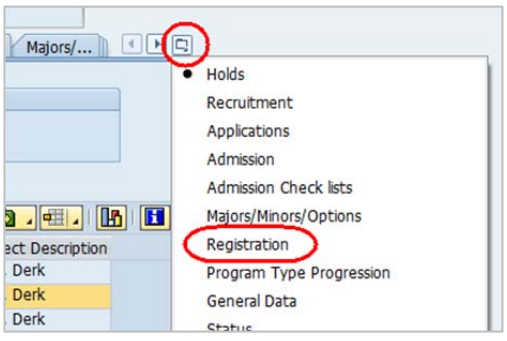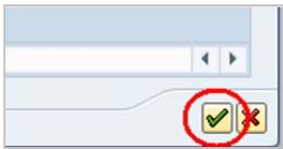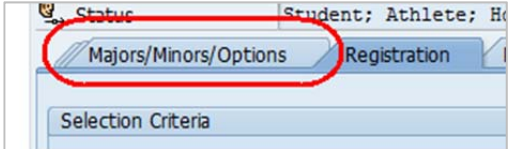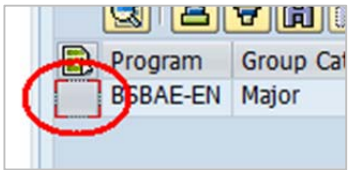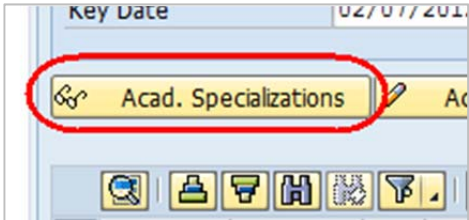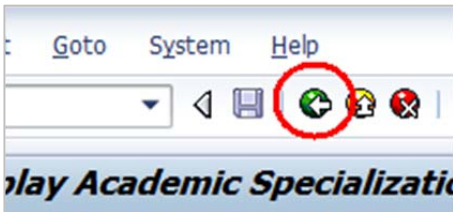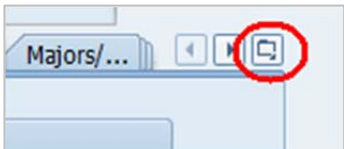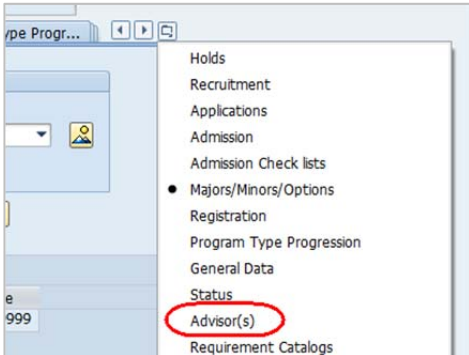
Exercise 4 – Display Student File Data – PIQST00

Scenario

You need to view the student file data for Derk Pitt, 10037714.

Enter the Student File Screen		
1. ☐	What is the student's **Student Number**?	
2. ☐	Go to the **Holds** tab	
3. ☐	How many Holds records are there?	
4. ☐	Are any of the Holds active? How can you tell?	
5. ☐	Click on the **Select** icon to the left of the **Young Library Hold**	
6. ☐	Click on the **Display** icon	
7. ☐	Who should the student contact to remove this hold? Where did you find the information?	
8. ☐	Click **Continue** to close the **Maintain Holds** window	
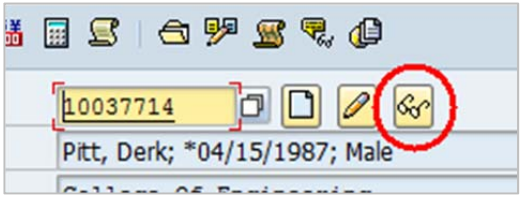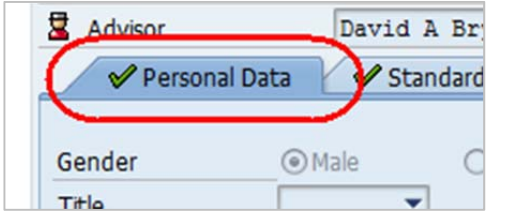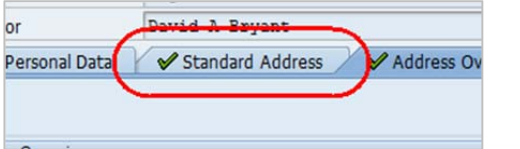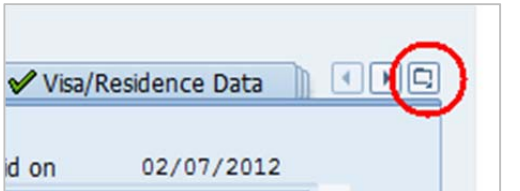
9. ☐	Click on the **Admission** tab		
10. ☐	Notice which **Program** is approved and when it was approved?	
11. ☐	Click on the **Tab List** icon to the right of the tabs	
12. ☐	Select **Registration**	
12. ☐	What is the most recent registration for the **Program of Study**?	
13. ☐	Click on the **Program Overview** icon to the right of the **Program** field	
14. ☐	Notice the various records and the validity dates	
15. ☐	Click on the **Continue** icon	
16. ☐	Click on the **Majors/Minors/Options** tab	
17. ☐	Click on the **Select** icon to the left of the major	
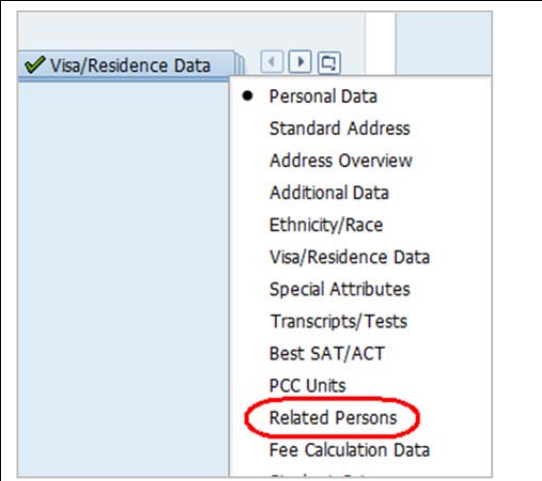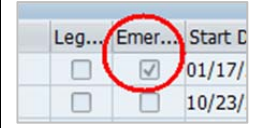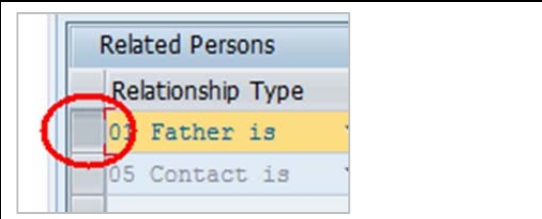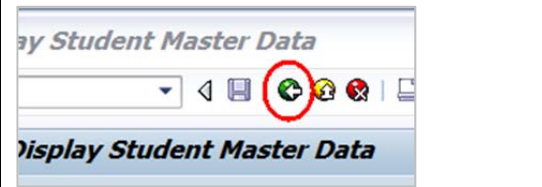
18. ☐	Click on the **Display Academic Specializations** button		
19. ☐	What is the student's major?		
20. ☐	Click on the **Back** icon located in the **Standard Toolbar**		
21. ☐	You will return to the **Student File** screen		
22. ☐	Click on the **Tab List** icon to the right of the tabs		
23. ☐	Select **Advisors**		
24. ☐	Who is the student's advisor?		
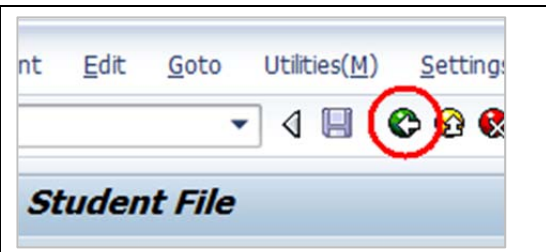
Exercise 5 – Display Student Master Data – PIQST00

Scenario

You need to view the time data for an employee in your department.

		Enter the Student File Screen
1. ☐	Click on the **Display** icon to the right of the **Student Number** field	10037714 ... Pitt, Derk; *04/15/1987; Male
2. ☐	The default tab is the **Personal Data** tab	Advisor David A Br... Personal Data Standard Gender Male Title
3. ☐	What is the student's **ID number**?	
4. ☐	Click on the **Address Overview** tab	dress Address Overview
5. ☐	How many addresses are listed?	
6. ☐	Click on the **Standard Address** tab	or David A Bryant Personal Data Standard Address Address Ov
7. ☐	What is the student's **Telephone** number?	
8. ☐	Click on the **Tab List** icon to the right of the tabs	Visa/Residence Data ... d on 02/07/2012

9. ☐	Select **Related Persons**	✔ Visa/Residence Data ◄ ▶ 🗐 ● Personal Data Standard Address Address Overview Additional Data Ethnicity/Race Visa/Residence Data Special Attributes Transcripts/Tests Best SAT/ACT PCC Units Related Persons Fee Calculation Data
10. ☐	Who is listed as the student's **Emergency Contact**? Leg… Emer… Start D ☐ ☑ 01/17/ ☐ ☐ 10/23/	
11. ☐	Click on the **Select** icon to the left of the first **Related Persons**	Related Persons Relationship Type 0? Father is 05 Contact is
12. ☐	Click on the **Display Related Person** button	◄ ▶ ⬚ ted person 🗐 ⚙ Display related person ✎ Maintain related
13. ☐	Click on the **Back** icon located in the **Standard Toolbar**	ner Edit Goto Extras E ▼ ◁ 🖫 🌐 ⬆ lay Person: 500063390
14. ☐	To return to the **Student File** screen, click on the **Back** icon located in the **Standard Toolbar**	ay Student Master Data ▼ ◁ 🖫 🌐 ⬆ ⊗ 🖳 Display Student Master Data

15. ☐	To return to the **Easy Access Menu**, click on the **Back** icon located in the **Standard Toolbar**	