Student Records
SLCM_AD_310
Practice Guide
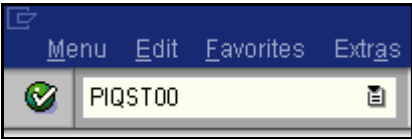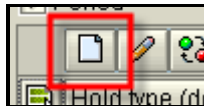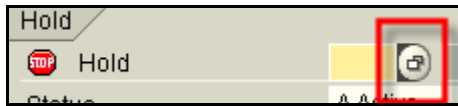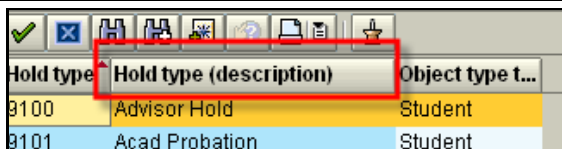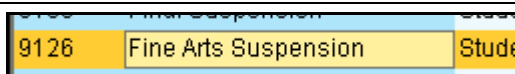
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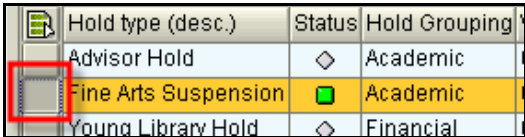
Exercise 2.1 – Create & Inactivate Holds

Scenario

You need to place a hold on the student's student file.

Field	Value
Log into the transaction Menu Edit Favorites Extras PIQST00	PIQST00
Student File	
Student Number	*Use the **Ex. 2.1 Student Name** provided by your trainer*
Holds Tab – Create Hold	
Click on the **Create** icon located on the tab	
Maintain Holds	
Click on the **Possible Entries** icon in the	Hold Hold
To sort the **Hold Type (Description)**, click on the column heading	Hold type Hold type (description) Object type t... 9100 Advisor Hold Student 9101 Acad Probation Student
Double-click on **Fine Arts Suspension**	9126 Fine Arts Suspension Stude
Status	Should default to Active
Start	Should default to today's date

Click on the **Save** icon	
Inactivate Hold	
Notice the Status column for the new hold	
Click on the **Select** icon to the left of the hold you just created	
Click on the **Activate ←> Inactivate** icon	
Start	Should default to today's date
Click on the **Save** icon	
Holds Tab	
Notice that the Status has changed for this hold	

Exercise 2.2 – Create a Note on a Student's File

Scenario
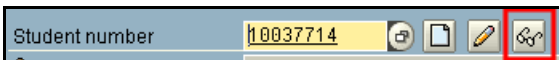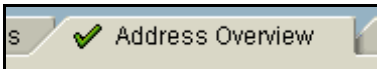
Your student has decided to change programs, so you need to make the changes in the system.
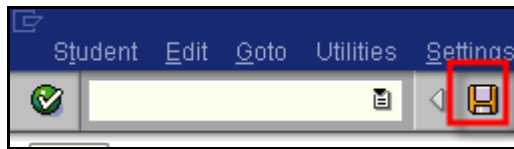
Field	Value
Student File	
Student ID Number	*Use the **Ex. 2.1 Student Name** provided by your trainer*

Exercise 3.1 – Change Student Address

Scenario

You need to view and change a student's address.

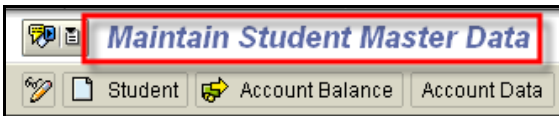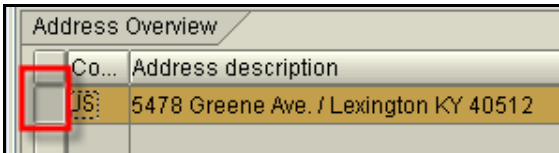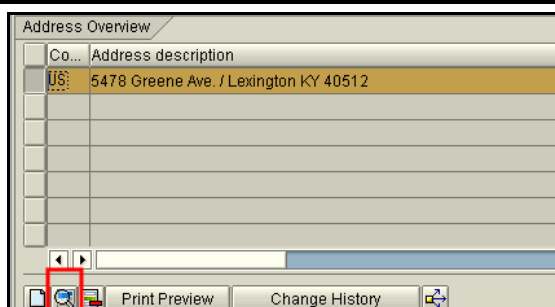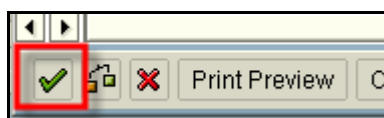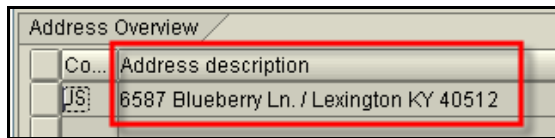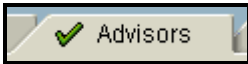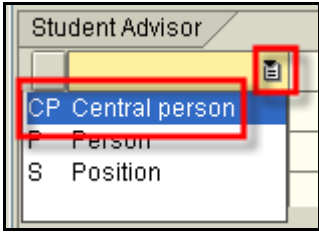| Field	Value
Student File	
Student Number	*Use the **Ex. 2.1 Student Name** provided by your trainer*
To open the **Student Master Data** screen, click on the **Display** icon to the right of the **Student Number** field.	Student number 10037714
Display Student Master Data	
Click on the **Address Overview** tab	s ✔ Address Overview
Maintain Student Master Data mode	
The student record opens in **Display** mode so multiple users can view a student's record at the same time To **EDIT** a student's record, click on the **Display <-> Change** icon **Note:** Only one person can make edits to a student's master data at a time	Display Account Ba
Make sure the screen title says **Maintain Student Master Data**	Maintain Student Master Data Student Account Balance Account Data
Changing an Address	
In the **Address Overview** tab, click on the **Select** button to the left of the address you wish to change to highlight your selection.	Address Overview Co... Address description US 5478 Greene Ave. / Lexington KY 40512
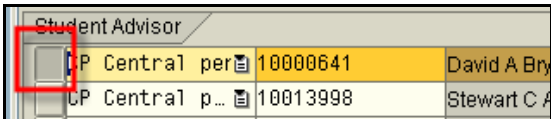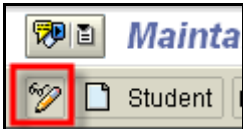
Field	Value
Click on the **Choose** icon	
This will open a pop-up window for editing the student's address Change the **House No./street** for your student *You may change the address to whatever you wish*	
Click on the **Continue** icon at the bottom of the **Student & Contract Partner Change: Address** pop-up box to accept your changes	
Address Overview Tab	
The screen will return to the Address Overview tab. Did the address change in the **Address Usage** section?	
To save your changes, click on the **Save** icon at the top of the screen	
Return to display mode by clicking on the **Display <-> Change** icon **Remember:** Always change back to display mode after you have completed the changes on the student's record.	

Exercise 3.2 – Add Advisor

Scenario

You need to view and change a student's advisor.

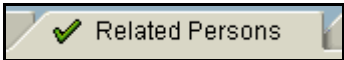| Field	Value
Student Master Data	
Student Number	*Use the **Ex. 2.1 Student Name** provided by your trainer*
Go to the **Advisors** tab	✔ Advisors
Advisors Tab	
Who is the current advisor?	
Change Student Master Data	
To make a change to the current advisor list, you will need to be in Maintain mode. To toggle from Display mode to Maintain mode, click on the **Display ←> Change** icon	Display ✏ Account Ba
Adding an Advisor	
On the first row, click on the **Drop-Down List** icon in the first field and select **CP Central Person**	Student Advisor CP Central person P Person S Position
Click in the second field and type the partial name of the advisor using a wildcard (*) Student Advisor CP Central p… jones*	*Use the **Ex. 3.2 Advisor Name** provided by your trainer*
Press **Enter** to pull up the advisor information	

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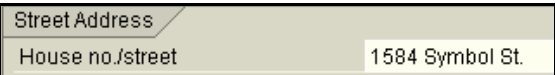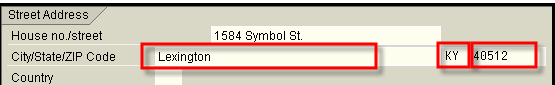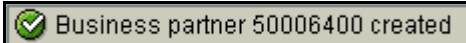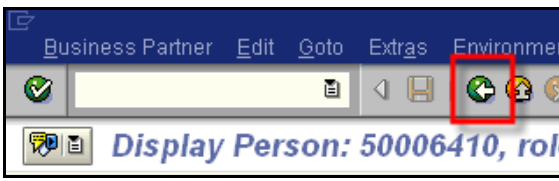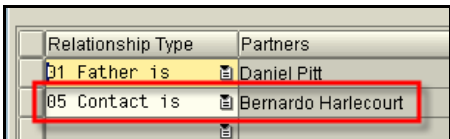
Field	Value
Click on the **Save** icon	
Deleting an Advisor	
Click on the **Select** icon to the left of the first advisor in the list	
Click on the **Delete Advisor** button	
Click on the **Save** icon	
Return to display mode by clicking on the **Display <-> Change** icon **Remember:** Always change back to display mode after you have completed the changes on the student's record.	

Exercise 3.3 – Create Related Person

Scenario

You need to display and create a student's related person.

Field	Value
Student Master Data	
Student Number	*Use the **Ex. 2.1 Student Name** provided by your trainer*
Select the **Related Persons** tab	✔ Related Persons
Create Related Person	
To make a change to the current advisor list, you will need to be in Maintain mode. To toggle from Display mode to Maintain mode, click on the **Display ⟵> Change** icon	Display / Account Ba
Click on the **With New Related Person** button and select **Contact Is**	With new related person Father is Mother is Spouse is Legal Guardian is Contact is
Create Person: Role Related Person	
First Name Name / First Name Bernardo	Enter a first name for the contact person
Last Name Last Name Harlecourt	Enter a last name for the contact person

Field	Value
House No./Street Street Address House no./street 1584 Symbol St.	1584 Symbol St.
City/State/Zip Code (There are 3 fields on this line; the city goes into the first field; state in the second; zip code in the third Street Address House no./street 1584 Symbol St. City/State/ZIP Code Lexington KY 40512 Country	Lexington, KY 40512
Country (Mandatory field) Country US	US
Telephone Number (no dashes!) Telephone 85924569087	8592459087 (note there are no dashes)
Click on the **Save** icon	
A system message will appear in the **Status** line at the bottom of your screen	Business partner 50006400 created
Click on the **Back** icon to return to the Related Persons tab	Business Partner Edit Goto Extras Environmer Display Person: 50006410, rol
Look to see the additional related person you entered has been added	Relationship Type Partners 01 Father is Daniel Pitt 05 Contact is Bernardo Harlecourt
Click on the **Save** icon again to save the listed Related Persons	
Return to display mode by clicking on the **Display <-> Change** icon **Remember:** Always change back to display mode after you have completed the changes on the student's record.	Mainta Student