**Campus Solutions
Training Guide**

Guide to the Advisor Role

**Corporate Applications Training Team
The University of Manchester
email:** training.corpapps@manchester.ac.uk
www.itservices.manchester.ac.uk/trainingcourses/corporateapplications
Version: 1.0

Table of Contents

Introduction

What is Campus Solutions?

Campus Solutions is a Higher Education Administration package, provided by a company called PeopleSoft. **PeopleSoft** are owned by the global company, **Oracle** who provide management information systems to corporate clients. Here at the University of Manchester we have decided to use Campus Solutions as our student administration package.

How can I use Campus Solutions as an Advisor?

If you are linked to a student as a **Personal Tutor**, a **Research Supervisor**, or similar; you will be 'flagged' in Campus Solutions as an **'Advisor'**. The Advisor Role is therefore designed to allow you access (in a **read-only** capacity) to various levels of data regarding the students to which you are linked.

You may find that you have been assigned multiple roles in Campus Solutions, accessed via the same User ID, in which case you may see additional menu paths and areas of accessibility. However currently, the only other additional roles open to academics are the **Instructor** role (which is automatically assigned), and the **Program Director** role (which is manually assigned to Program Directors only). *Note that this training guide does not cover anything with regards to these other roles.*

What is the purpose of this session?

This session will introduce you to the general aspects of the system – particularly with regard to the **basic features** such as navigation, accessing data, and so on. It will also take you through the sections of the system that you are able to access with **your role of 'Advisor' within Campus Solutions**.

Navigation

Main Menu

Upon logging into the system, you will be presented with a **split screen** menu page. This carries a **linear menu down the left-hand side** and a **folder view menu on the right**. Both of these are in effect identical, accessing the same pages within the system. It is up to you to choose which you wish to work with.

Linear Menu

Folder View
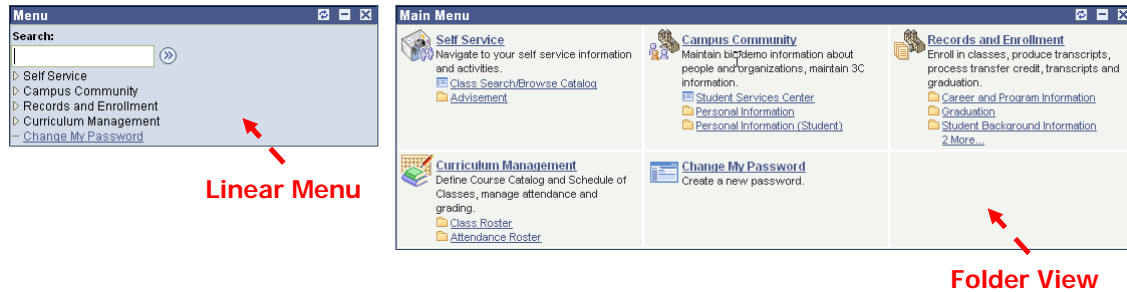
Folders & Sub-Folders

All menu items are in-fact folders, which house further sub-folders within them. If using the **linear menu** on the left, you select the main folder you wish to access, and then the next, and so on.

Here we have navigated to: Records and Enrollment > Career and Program Information. The individual data pages to access and work with in this section are now listed - Student Program/Plan and also Registration Details.

← — — — — — **Click on: Records and Enrollment**

← — — — — — **Click on: Career and Program Information**

← — — — — — **Data pages now available to access**
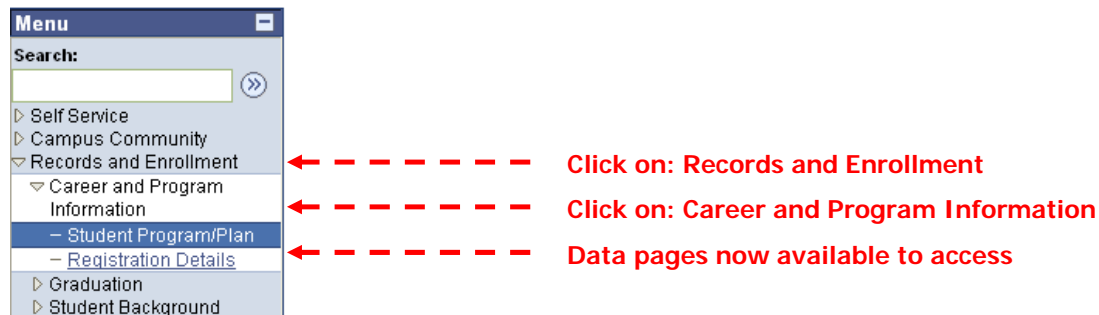
The advantage to the **folder view** is that you can see and access subfolders immediately. You can see what types of items are contained within each section 'at a glance'. This can help you in determining which section you need to access without you having to click into each one.

For example, looking again at the Records and Enrollment menu, if we were using the folder view then we can immediately see the further subfolders within that section.

Working with Data

Searching

Once you access a page within Campus Solutions you will usually be presented with a search page. These will vary, some having more search criteria than others, but they all work in the same way.

Student Program/Plan
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Academic Institution:	begins with		
ID:	begins with		
Academic Career:	=		
Student Career Nbr:	=		
Academic Program:	begins with		
Academic Plan:	begins with		
Campus ID:	begins with		
National ID:	begins with		
Last Name:	begins with		
First Name:	begins with		

☐ Case Sensitive

[Search] [Clear] Basic Search 💾 Save Search Criteria

Each field has a **drop-down menu** associated with it to enable you to enter different levels of search criteria. These will all default to 'begins with', however you are also able to use any of the other operators to assist your search further.

Operator	Example	Results Returned
Begins with	Last Name begins with 'Davidson'	All people in the system with a last name of 'Davidson'.
Contains	First Name contains 'anna'	All people with the letters 'anna' occurring in their first name. Eg: 'anna'; 'anna-marie'; 'hannah'.
=	ID = '7057391'	The person with the ID number equal to '7057391'.
Not =	ID Not = '7057391'	All person IDs in the system except that of '7057391'.
<	ID < '7057391'	All people in the system with an ID lower than '7057391'.
<=	ID <= '7057391'	All people in the system with an ID lower than or equal to '7057391'.
>	ID > '7057391'	All people in the system with an ID greater than '7057391'.
>=	ID >= '7057391'	All people in the system with an ID greater than or equal to '7057391'.
Between	ID between '7050000' and '7060000'	All people in the system with an ID number between the range of '7050000' and '7060000'.
In	First Name in 'Kimberley'	All people in the system with an exact first name of 'Kimberley'.

To perform a search, simply **enter your criteria directly into the search fields** and then click on the **Search** button. Your **Search Results** will then be displayed for you, where you can **click on the relevant record** to select it.

ⓘ   **NOTE**: *Should you ever be taken directly to a data page then this means that there is just the one match in the system for the criteria you have entered, and therefore no need to present you with a selection list.*

Page Set Up

Pages within Campus Solutions are often divided into **Tabbed Sections**. This is so that the page can be divided up easily, as opposed to having all data visible on one big long page. You can move across the tabs simply by clicking on them. You will also usually see **Base Data** relating to the person/entity being viewed (such as name and ID number) across the top of most screens.

Page Tabs – – – ➤

Base Data – – – ➤

| Student Program | Student Plan | Student Degrees |

Unknown Davidson   1234567
Academic Career: Undergraduate   Career Requirement Term   **Student Career Nbr:** 0

Find | View All   First ◄ 1 of 1 ► Last

Status:	Discontinued	**Registration Details**	**Effective Sequence:**	0
Effective Date:	27/03/1998			
Program Action:	DISC	Discontinuation	**Action Date:**	27/03/1998
Action Reason:	PERS	Personal Reasons	**Joint Prog Appr:**	☐
Academic Institution:	UMANC	The University of Manchester		
Academic Program:	03363	BEng(Hons) Electrical and Elec	**Admissions**	
			☐ **From Application**	
Admit Term:	0971	97/98 Year	**Application Nbr:**	
			Application Program Nbr:	0
Requirement Term:	0971	97/98 Year		
Expected Grad Term:		**Campus:** MAIN	Main	**Acad Load:** Full-Time

Records are displayed within the system as if they are **stacked** on top of each other – hence you will usually only be able to view the most recent entry when you first enter a page. The term 'record' is usually referred to as being the entire record – each individual entry against that record is known as a **row**.

You will be able to see how many rows are stacked against each other from the **Page Navigation Bar**. In the example below we have '1 of 1' displayed, which means we have just the 1 row in the stack – however this could just as easily display 1 of 2, 1 of 3, and so on.

| Student Program | Student Plan | Student Degrees |

Unknown Davidson   1234567
Academic Career: Undergraduate   Career Requirement Term   **Student Career Nbr** 0

Find | View All   First ◄ 1 of 1 ► Last

Status:	Discontinued	**Registration Details**	**Effective Sequence:**	0
Effective Date:	27/03/1998			
Program Action:	DISC	Discontinuation	**Action Date:**	27/03/1998
Action Reason:	PERS	Personal Reasons	**Joint Prog Appr:**	☐
Academic Institution:	UMANC	The University of Manchester		
Academic Program:	03363	BEng(Hons) Electrical and Elec	**Admissions**	
			☐ **From Application**	
Admit Term:	0971	97/98 Year	**Application Nbr:**	
			Application Program Nbr:	0
Requirement Term:	0971	97/98 Year		
Expected Grad Term:		**Campus:** MAIN	Main	**Acad Load:** Full-Time

Should you have a number of rows in a stack, you can navigate between these by using the **Video Buttons** (forward and backward arrows). You can also click on the **First** and **Last** buttons to jump directly to the first or last rows in the stack, respectively. (Note that this functionality is only available if you have more than one row in the stack).

Find | View All   First ◄ 1 of 2 ► Last

There will be times when you may wish to **view all of the rows in a stack together**, rather than have to 'page' through them using the video buttons.

Effective Dates

Each row entered within Campus Solutions has what is known as an **Effective Date**. This is, in essence – the date at which that row of data becomes effective. When you add a new row into Campus solutions, the Effective Date will default to be that days date, but this can always be over-written (say, if you wish for the change to be effective from the future, or even from a previous point in time). It is the Effective Dates of rows that enables the system to determine which is currently active.

Effective Dates are extremely important within Campus Solutions and control many things.

If we take a look at some examples, we can see here that the first row became effective from 03/04/2006 and the second (most current) record became effective from 01/06/2006.

This row has an Effective Date of 03/04/2006

Status:	Active in Program	
'Effective Date:	03/04/2006	
'Program Action:	ACTV	Activate
Action Reason:		
'Academic Institution:	UMANC	The University of Manchester
'Academic Program:	00637	BSc(Hons) Anatomical Sciences
'Admit Term:	1061	06/07 Year
Requirement Term:	1061	06/07 Year
Expected Grad Term:		'Campus: MAIN

This row has an Effective Date of 01/06/2006

As this is a later date than 03/04/2006, this is the most recent entry and therefore the current row

Status:	Active in Program	
'Effective Date:	01/06/2006	
'Program Action:	PRGC	Program Change
Action Reason:	RECH	Change Prog after Regn
'Academic Institution:	UMANC	The University of Manchester
'Academic Program:	00634	BSc(Hons) Anat Sci w Ind Exp
'Admit Term:	1061	06/07 Year
Requirement Term:	1061	06/07 Year
Expected Grad Term:		'Campus: MAIN

Changing Passwords

Password changes are very simple. The Change Password page can be **accessed directly from the main menu** (listed towards the bottom).

Navigate To: Change My Password

Change Password

User ID: mpciikd

Description: Kim Davidson

'Current Password: ••••••

'New Password: ••••••

'Confirm Password: ••••••

Change Password

To change your password, enter your current password, along with your new password information into the fields provided and then click on the **Change Password** button.

New Terminology

Finally, here is a list of some new terminology that you will encounter within the system. Don't worry – you do not have to 'memorise' this list. Some of these words you will maybe never get to use, depending on your area of work. Those that you do need to know you will pick-up over time, as you use the system more frequently.

Campus Solutions Term	Meaning
Academic Career	Career / Study Level
Academic Group	School
Academic Plan	Route / Specialization
Academic Program	Course / Programme
Advisor	Personal Tutor / Mentor
Application Centre	School (to which an application is made)
Application Number	Application Number (system generated)
Award	Degree
Certificate	Diploma
Class	Course Unit / Module Instance
Course	Course Unit / Module
EmplID / ID	Person Number
Facility	Building
Matriculate	Roll Forward from Admissions
Milestone	Assessment Item (PG Research)
Negative Service Indicator	Blockage / Restriction (placed on a student)
Session	Semester (or period within)
Supervisor	Research / Project Supervisor
Term	Academic Year
Term Activate	Prepare for Registration
UCAS Application Number	UCAS / GTTR / NMAS Number
Units	Credits

Self Service

Class Search / Browse Catalog

This allows you to search for and view information on either individual classes or whole courses (such as description, units, enrolment capacity, etc).

Navigate To: Self Service > Class Search/Browse Catalog

- Select **Institution** – The University of Manchester.
- Select **Term** – As required from the drop-down menu.
- Choose to **Search for Classes** or **Browse Catalogue.**
- Click **Go.**

- **Search for Classes**

  o Enter your **class search criteria** using the **drop-down menus & tick-boxes** and then click on the **Search** button.

- o A page will be returned showing **all matching classes**
- o Clicking on the **Section** link will take you to further details about a class

- **Browse Catalog**

  - o View courses of interest using the **alphabetical index**.
  - o Clicking on the **Description** link will take you to further details about a course
  - o You can also use the **View Class Sections** link to take you to the class information page, as shown in the previous section.

Advisement

This allows you to view data relating to any students to which you are linked as an Advisor (usually as a personal tutor; academic tutor; postgraduate supervisor, etc). This is likely to be one of your main areas of use.

Navigate To: Self Service > Advisement > View Advisee's Information

- You will be presented with a **list of all of the students to which you are attached as an Advisor**. From here you can link through to many pages of other data about these students, as well as contact them by email.

You can access all of the following information about any of these students:

- Academic Information *(information on the degree program they are taking)*
- Address* *(view addresses held – *note that this is not currently working)*
- Class Schedule *(view their class timetable)*
- Degree Progress *(run an academic advisement report)*
- Emergency Contacts *(view their emergency contacts)*
- Enrollment Appointments* *(*not currently used)*
- Grades *(current GPA and units taken/in progress)*
- Telephone *(view telephone numbers held)*
- To Do List* *(view a list of tasks the student needs to complete – *admissions only)*
- Transfer Credit Report *(run a report to show details of any transferred credit)*
- Unofficial Transcript *(run a 'quick & simple' transcript)*

- To do this, **click on the drop-down menu** against their name and **select the option of interest**. Then simply click on the **forward arrow** icon to be taken to that page.

ⓘ   **NOTE**: *Most of these pages open immediately to the displayed-data; however those that do not simply require you to select an option (such as a term in order to view a class schedule) or follow steps to run a process (such as to produce a transcript). Either way; in these cases, full on-screen instruction is given as to what to do in order to view the data.*

You can also send an email via the system to all/any of these students.

- To send an email to **all students** (for which you are an Advisee) simply click on the **Notify All Advisees** button.
- This will then open up a **Notification** page with the students email addresses already entered. From here, simply type in your message and click the **Send Notification** button.

- To send an email to **selected students** you need to tick against the students you wish to email and then click on the **Notify Selected Advisees** button.
- This will then open up the **Notification** page (as shown above) with the relevant student email addresses entered. From here, simply type in your message and click the **Send Notification** button.

Training Guide
 Guide to the Advisor Role

Campus Community

Student Services Centre

This is a bit of a 'one-stop-shop' for some of the most commonly referenced student data.

Navigate To: Campus Community > Student Services Center

- Enter some search **criteria** to identify the relevant student.
- Click on **Search.**
- The **Student Services Centre** page will open up.

- As you can see, the page is split into **tabbed sections** – simply click across each of them to view the data that you require.

Below is a summary of the data that is available within each of these sections:

- o Academic History
- o Personal Information
- o Admissions Pending
- o Holds *(negative service indicators)*
- o To Do List *(used for admissions only)*

- o Service Indicators
- o Initiated Checklists
- o Student Groups
- o Personal Data
- o National ID
- o Names
- o Addresses
- o Phones
- o Email Addresses

- o Application Details *(Institution/Career/Program/Application Number)*
- o External Education
- o Test Summary

- o Study Details *(Institution/Career/Program)*
- o Term Summary

- o Transferred Credit Details

ⓘ   **NOTE**: Both the **General** and the **Academic** tabs also contain **green 'edit' buttons** *alongside some of the listed data. Although these will take you to the main 'holding' page for the data, note that it is not actually editable.*

Personal Information

This section contains a single page which enables you to access any disability information about a student.

Navigate To: Campus Community > Personal Information > Health Information > Disability Details

- Enter some search **criteria** to identify the relevant student.
- Click on **Search.**
- The **Disability Details** page will open up.

Disability Details
Enter any information you have and click Search. Leave fields blank for a list of all values.
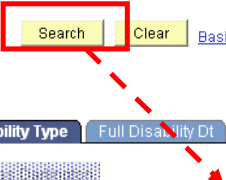
| **Find an Existing Value** |

ID: begins with 5734369
Campus ID: begins with
National ID: begins with
Last Name: begins with
First Name: begins with
☐ Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

| Disability Type | Full Disability Dt | Exam Support | Format Support | Mobility Support | ▶ |

No Disabilities for this Person

- In the example shown here, **no disabilities are actually registered** – however should the student have declared any disability information to the University the details of this would be available on this page.
- You will also see that this page makes use of **tabbed sections**, enabling you to access the following items of information:

  - o Disability Type *(default tab)*
  - o Full Disability Details
  - o Exam Support
  - o Format Support
  - o Mobility Support
  - o Other Support *(via the 'forward arrow' icon, after the 'Mobility Support' tab)*

Personal Information (Student)

This section comprises of a selection of areas/pages which each focus on a different aspect of student personal/biographical data.
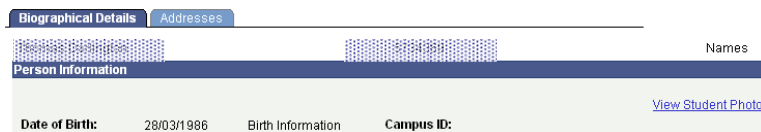
ⓘ   **NOTE**: *Upon accessing any of these pages, you will be prompted to search for a student:*

  ✓ Enter some search **criteria** to identify the relevant student.
  ✓ Click on **Search.**

Add/Update a Person

Navigate To: **Campus Community > Personal Information (Student) > Add/Update a Person**

- Here you are able to view the **full address/biographical details** held for the student (names, addresses, emails, phones, date of birth, etc).
- The page is split into tabbed sections, with the second tab being completely devoted to Addresses (including historical data).
- Contrary to what the name of the page suggests, you will only be able to view this data (and not actually update it) as the 'Advisor' role is set with **read-only** access.

Biographical (Student)

Navigate To: **Campus Community > Personal Information (Student) > Biographical (Student)**

- This folder houses a collection of other folders/pages which hold various levels of biographical data for the student.

  o **Names** – View all student name data.
  o **Emergency Contacts** – View any emergency contact details that have been given.
  o **Addresses/Phones** – This folder contains 3 pages of data, one of each enabling you to view Address, Email and Phone details.
  o **Relationships** – This folder contains a link to a page which allows you to look at a student's relationship to other individuals.
  o **Work Experience** – View details of any work experience carried out by the student.
  o **Employment History** – View details of a student's previous employment.

Identification (Student)

**Navigate To: Campus Community > Personal Information (Student) >
                Identification (Student)**

- This folder contains a link to the **Residency Data** page, which allows you to view information relating to a students determined residency status (home, overseas, under review, etc).

Participation Data

**Navigate To: Campus Community > Personal Information (Student) >
                Participation Data > Accomplishments**

- In this area you have a choice of 2 data pages:

  o **Honors and Awards** – This will allow you to view any awards/achievements the student may have gained (such as an award form a recognized society).
  o **Publications –** This allows you to view any publications that the student may be accredited with (such as reference books, journals, etc).
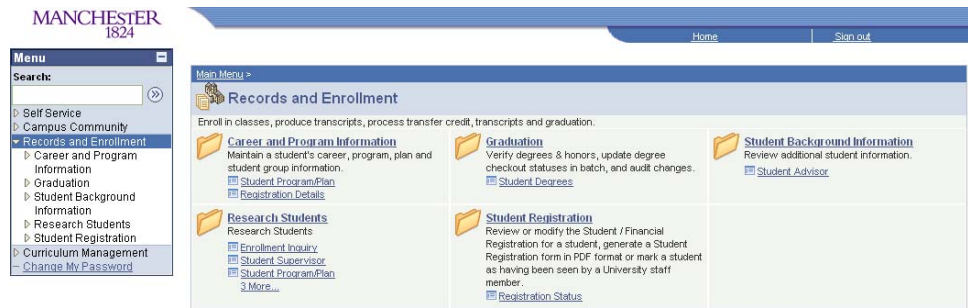

Health Information (Student)

**Navigate To: Campus Community > Personal Information (Student) >
                Health Information (Student)**

- This folder contains a link to the **Disability Details** page. This is covered on **page 16**.

Records and Enrollment

ⓘ   **NOTE**: *Upon accessing any of these pages, you will be prompted to search for a student:*

- ✓ Enter some search **criteria** to identify the relevant student.
- ✓ Click on **Search.**

Career and Program Information

This section contains two pages, which enable you to view a student's career, program, plan and registration information.

Student Program / Plan

Navigate To: **Records and Enrollment > Career and Program Information > Student Program / Plan**

- This page shows you which **Program & Plan** a student is taking, the status they are at (via a combination of the **Program Action/Action Reason**), the academic year (**Admit Term**), their degree information and so forth.
- The page is split into tabbed sections which allow you to switch easily between viewing between **Student Program**, **Student Plan** and **Student Degree** data.
- There is also a link on to take you directly to the **Registration Details** page for the student. *(This is detailed in the next section)*.

Registration Details

**Navigate To: Records and Enrollment > Career and Program Information >
                 Registration Details**

- This page shows you the date at which the student was matriculated (**Effective Date**) and which **Session** a student is registered for; along with the program **Start Date** and **Expected End Date**.
- If a student is in their **Final Year** then this tick-box will be selected and an **Expected Graduation** date will also be visible.

Graduation

This section contains a single page which will allows you to view student degree information.

**Navigate To: Records and Enrollment > Career and Program Information >
                 Graduation > Student Degrees**

- This page shows you the **Degree** awarded, the **Completion Term**, the **Degree Status** and **Date**, along with the **Honors** and **Rank** *(if applicable).*

Student Background Information

This section contains a single page which will allows you to see the advisors linked to the student.

Navigate To: **Records and Enrollment > Career and Program Information >**
Student Background Information > Student Advisor

- This page shows you any staff members that are linked to the student in an **Academic Advisor** capacity, along with their **Advisor Role** (such as 'Personal Tutor' or 'Main Supervisor').

Research Students

This section comprises of a selection of pages which each focus on a different aspect of research student study/assessment.

ⓘ **NOTE**: *When using the search facility upon entering any of these pages, the 'Academic Career' option will automatically default to 'Postgraduate Research'.*

Enrollment Inquiry

Navigate To: **Records and Enrollment > Career and Program Information >**
Research Students > Enrollment Inquiry

- Here you are able to view any classes (course units) that a student is enrolled onto; including details of the **Class Nbr**, **Subject**, **Catalog Nbr**, **Session**, and so on.

Student Supervisor

Navigate To: **Records and Enrollment > Career and Program Information > Research Students > Student Supervisor**

- This is the **same as the Student Advisor section**, as covered on **page 21**.

Student Program / Plan

Navigate To: **Records and Enrollment > Career and Program Information > Research Students > Student Program / Plan**

- This is the **same Student Program / Plan section**, as covered on **page 19**.

Student Milestones

Navigate To: **Records and Enrollment > Career and Program Information > Research Students > Student Milestones**

- A milestone is simply a target that must be met by a certain deadline (such as a viva or panel meeting) and a set of milestones are attached to each research student in order to monitor their progress.
- This page shows all of the **milestones** attached to a student and enables you to monitor their progress through their research study.
- The page is split into tabbed sections, allowing you to view different sets of data relating to these (such as the **Student Milestones** themselves, the **Advisor / Completion Info** and **Milestone Attempts**)

   (i)   *NOTE: Milestones are a complex area and so if you are not familiar with these, it is recommended that you investigate them further by way of the 'Research Student Management' training guide, available for download from the following webpage:*

http://www.itservices.manchester.ac.uk/trainingcourses/corporateapplications/campus/sturecs/sr%20material/

Thesis Management

Navigate To: **Records and Enrollment > Career and Program Information > Research Students > Thesis Management**

- Here you are able to see details of a research student's thesis, such as the **Thesis Title** and any further **Description**.
- If there has been a **Title Change** or if the **Thesis is Submitted**, the relevant **tick-boxes** will also be completed.

Registration Details

Navigate To: **Records and Enrollment > Career and Program Information > Research Students > Registration Details**

- This is the **same Registration Details section**, as covered on **page 20**.

Student Registration

This section contains a single page which will allows you to see the status of a student's registration.

Registration Status

Navigate To: **Records and Enrollment > Career and Program Information > Student Registration > Registration Status**

- This page shows you the **Career** and **Term** for which the student is due to register and whether or not they have completed **Student Registration** (academic registration) and/or **Financial Registration**.
- The **Student 'Seen' Status** will be automatically ticked once a student has been issued with a University Swipe/Library card.

Curriculum Management

Class Roster

This section contains a single page which will allows you to view a list of student enrolled on a particular class. You are also able to view a list of student that may have dropped from the class or are on the waiting list.

Navigate To: Curriculum Management > Class Roster > Class Roster

- Enter some **search criteria to identify your required class** (for example: Institution, Term, Subject Area, Catalog Nbr, Class Nbr).
- Click **Search**.

- A list of students that are **Enrolled** onto the class will be presented to you.
- You can view students that have **Dropped** from the class or are on the **Waiting List** by selecting these options from the **Enrollment Status** drop-down menu.

Attendance Roster

This section contains 2 pages which allow you to access a students attendance/absence records.

ⓘ   **NOTE**: *Upon accessing any of these pages, you will be prompted to search for a student:*

- ✓ Enter some search **criteria** to identify the relevant student.
- ✓ Click on **Search.**

Student Absence

Navigate To: Curriculum Management > Attendance Roster > Student Absence

- This page shows you the **Dates** of which a student has been absent from their study, along with the **Reason**.
- Note that this **data will only be present if it has actually been recorded**. This does not happen automatically and attendance/absence monitoring is not in place for all classes – it is up to the individual school as to whether they wish to record this or not.

Attendance Statistics

Navigate To: Curriculum Management > Attendance Roster > Attendance Statistics

- Here you can view a student's absence in a **summary** format.
- The page is split into tabbed sections, allowing you to view **Absence History**, **Absence Summary by Term**, **Cumulative Absence** and **Attendance by Term** *(via the 'forward arrow' icon, after the 'Cumulative Absence' tab).*

Further Help & Guidance

Training

If you have any queries regarding training on Campus Solutions, please contact the training team at:

Email: training.corpapps@manchester.ac.uk
Web: http://www.itservices.manchester.ac.uk/trainingcourses/corporateapplications/campus/

Support

If you require any help or support using Campus Solutions, please contact the Operational Support Helpdesk:

Email: cs.records@manchester.ac.uk
Web: http://www.campus.manchester.ac.uk/planningsupportoffice/SSO/OpHelpDesk/
Tel: 65444 *(internal)*