

# INTERIM TRAINING RESOURCE

## IMPORTANT TRAINING NOTE:

This interim training resource replaces information previously contained within the *Student Records Maintenance Complete Guide v11.2* and includes updates as part of the Student Experience Project.

This interim training resource is for use between 1<sup>st</sup> May – 14<sup>th</sup> July 2023 **ONLY**.

From Monday 17<sup>th</sup> July 2023 onwards, this training resource will be replaced with a brand-new online Student Records Management training suite.

## Student Records Management

### Viewing a Student Record and Managing Student Personal Data

**Student Records Management**  
**Student Record Data**

**Version: INTERIM 1.0**

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## Viewing a Student's Record

### Viewing Student Status

A student status can be viewed within the **Student Program/Plan** component (the main source for tracking a student's history). Anything that happens to the student throughout their student life **MUST** be recorded here. .

The pages within this component, records; Student Program Information, Student Plan Information, any Student Attributes attached to a student and Nursing & Midwifery information.

**Navigate To:** Menu > Records & Enrolment > Career & Program Information > Student Program/Plan

1. Enter the student **ID** number in the **ID** field and click **Search**.

**TRAINING NOTE:** Select the **Include History** and click **View All** to view a student's full historical record.

The **Student Program/Plan** component will open by default on the **Student Program** page:

Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees | Hesa Plan 1 | Hesa Plan 2 | D

*Student Details Withheld*

Academic Career: Undergraduate | Career Requirement Term | Student Career Nbr: 0

Status: Active in Program | Registration Details

\*Effective Date: 26/08/2010 | Effective Sequence: 1

\*Program Action: MATR | Matriculation | Action Date: 26/08/2010

Action Reason: | Joint Prog Appr: ☐

\*Academic Institution: UMANC | The University of Manchester

\*Academic Program: 00234 | BA(Econ & Soc Studies)(Hons)

\*Admit Term: 1101 | 10/11 Year

Requirement Term: 1101 | 10/11 Year

Expected Grad Term: | \*Campus: MAIN | Main | \*Acad Load: Full-Time

Admissions

☒ From Application

Application Nbr: 00474707

Application Program Nbr: 1

HESA Instance | CAS Details

Save | Return to Search | Notify | Refresh | Add | Update/Display | Include History | Correct History

### Viewing Enrolments

The **Enrollment Summary** component of the Campus Solutions student system, allows staff to view a complete list of an individual student's enrolments.

**Navigate To:** Menu > Records & Enrollment > Enrollment Summaries > Enrollment Summary

### Enrollment Summary

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

Find an Existing Value

Limit the number of results to (up to 300):

ID:

Academic Career:

Academic Institution:

Term:

Campus ID:

National ID:

Last Name:

First Name:

Term Alternate Key:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

1. Enter the student **ID** in the **ID** field and click **Search**.

The **Enrollment Summary** component will open by default on the **Enrollment Summary** page:

Enrollment Summary

Term Statistics

Student Details Withheld



Term: 10/11 Year

Career: UGRD

The University of Manchester

[Print Study List Report Manager](#)

[Find](#) | [View All](#) | [First](#) | 1-3 of 18 | [Last](#)

	Class Nbr	Subject	Catalog	Session	Section	Status	Status/Reason	Acad Prog	Grading Basis	Units Taken
	6278	ECON	10001	1st Sem	CLS4	Enrolled	Enrolled	00234	Non-Graded	
		Further Mathematics		Class						
	6273	ECON	10001	1st Sem	LEC	Enrolled	Enrolled	00234	UGRD	10.00
		Further Mathematics		Lecture						
	4482	ECON	10081	1st Sem	LEC	Enrolled	Enrolled	00234	UGRD	10.00
		The UK Economy -		Lecture						
		Microeconomic								

On this page you can view a student's class enrolments. By default this page will only display the first three rows of data.

Find | View All | First 1-3 of 18 | Last

2. Click **View All** to display a complete list of all enrolments.

## Viewing Grades

The **Student Grades** component allows staff to view a list of classes that an individual student is enrolled in, along with any current grading information.

**Navigate To: Menu > Records & Enrollment > Student Term Information > Student Grades**

1. Enter the student **ID** in the **ID** field and click **Search**.

**Student Grades**

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

[Find an Existing Value](#)

Limit the number of results to (up to 300):

ID:

Academic Career:

Academic Institution:

Term:

Campus ID:

National ID:

Last Name:

First Name:

Term Alternate Key:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

The **Student Grades** component will open by default on the **Student Grade Inquiry** page:

A student's classes will then be displayed, along with any grading information applicable at that time.

**Student Grade Inquiry** **Term Statistics**

*Student Details Withheld* [Print](#) [Report Manager](#)

Term: 07/08 Year Career: UGRD Institution: The University of Manchester

	Class Libr	Subject	Catalog	Component	Section	Grade Input	Official Grade	Grading Basis	Units Taken	Session	Course Name
<a href="#">Detail</a>	3916	CHEM	30211	Lecture	LEC1	65	65	UGRD	10.00	1st Sem	Core Physical Chemistry B
<a href="#">Detail</a>	3928	CHEM	30531	Lecture	LEC1	65	65	UGRD	10.00	1st Sem	Topics in Environmental Chemis
<a href="#">Detail</a>	3930	CHEM	31332	Lecture	LEC1	81	81	UGRD	10.00	2nd Sem	Bioinorganic Chemistry
<a href="#">Detail</a>	3946	CHEM	40212	Lecture	LEC1	65	65	UGRD	10.00	2nd Sem	Advanced Instrumental Methods
<a href="#">Detail</a>	3960	CHEM	41600	Lecture	LEC1	65	65	UGRD	60.00	Full Year	MCChem Yr4 Project
<a href="#">Detail</a>	33838	CHEN	40811	Lecture	LEC1	49	49	UGRD	10.00	1st Sem	Fundamentals of Analyt Chemist
<a href="#">Detail</a>	34099	CHEN	40812	Lecture	LEC1	75	75	UGRD	10.00	2nd Sem	Fundamentals of Analyt Chemist

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

## Viewing Awards

The **Student Degrees** component allows staff to view a student's awarded degrees.

**Navigate To: Menu > Records & Enrollment > Graduation > Student Degrees**

1. Enter the student **ID** in the **ID** field and click **Search**.

**Student Degrees**

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

Find an Existing Value

Limit the number of results to (up to 300): 300

ID: begins with 1234567

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

The **Student Degrees** component will open by default on the **Degree** page. Any awarded degree information will then be displayed for you to view:

Degree Degree Honors Degree Plan Degree Sub-Plan

*Student Details Withheld*

Find | View All First 1 of 1 Last

\*Degree Nbr: 01

\*Degree: MSC Master of Science

\*Institution: UMANC The University of Manchester

Primary Career: PGDT Postgraduate Taught

\*Completion Term: 1081 08/09 Year

\*Confer Date: 01/07/2008

\*Degree Status: Awarded

Degree Status Date: 04/12/2008

Degree GPA:

Honors Prefix Prefix: Suffix: P Pass

Rank/Size Class Rank: Of

**TRAINING NOTE:** If there is more than one degree to view, click **View All** or navigate through individual records using the record navigational buttons.

Find | **View All** First 1 of 2 Last

## Viewing Class Lists

The **Class Roster** component allows staff to quickly view enrolments for a class, as well as students in the dropped or waitlist status.

**Navigate To:** Menu > Curriculum Management > Class Roster > Class Roster

1. Enter the **Term** and **Class Number** appropriate fields and click **Search**.

**Class Roster**

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

Find an Existing Value

Limit the number of results to (up to 300):

Academic Institution: begins with

Term: begins with

Subject Area: begins with

Catalog Nbr: begins with

Class Nbr: =

Class Section: begins with

Session: =

Course ID: begins with

Course Offering Nbr: =

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

The **Class Roster** will open by default. Any enrolment information will be displayed for you to view:

**Class Roster**

BIOL 20982 - LEC1 The Biology of Being Human

Lecture (16365) [Class Detail](#)

2010/11 Academic Year | 2nd Semester | The University of Manchester | Undergraduate

Meeting Information			
Days & Times	Room	Instructor	Meeting Dates
TBA	TBA	Caroline Bowsher	31/01/2011 - 10/06/2011

\*Enrollment Status:

Enrollment Capacity: 999 Enrolled: 40

Enrolled Students					
ID	Name	Grade Basis	Units	Program and Plan	Level
1	Student Details Withheld	UGRD	10.00	BSc(Hons) Biology - BSc(Hons) Biology	Second Year
2	Student Details Withheld	UGRD	10.00	BSc Biol w/ Business & Manage - BSc Biol w/ Business & Manage	Second Year
3	Student Details Withheld	UGRD	10.00	BSc(Hons) Genetics - BSc (Hons) Genetics	Second Year
4	Student Details Withheld	UGRD	10.00	BSc(Hons) Biology - BSc(Hons) Biology	Second Year

**TRAINING NOTE:** You can also use this page to view a list of students who have dropped the class by selecting the **Dropped** value from the **Enrolment Status** optional values. Alternatively by selecting the **All** value to view a list of students, irrespective of their status).

\*Enrollment Status:

**All**

Enrollment Capacity: 999 Enrolled: 40

Enrolled Students [Customize](#) [Find](#) [First](#) [1-40 of 40](#) [Last](#)



2. If a class is part of a combined section, select **Show Combined Class Roster**.

**Class Roster**

AHVS 10331 - SEM1    Works in Focus I: Description

Seminar (10599) [Class Detail](#)

2010/11 Academic Year | 1st Semester | The University of Manchester | Undergraduate

Meeting Information			
Days & Times	Room	Instructor	Meeting Dates
Mo 12:00 - 14:00	4.05, Mansfield Cooper	<i>Details Withheld</i>	01/09/2010 - 30/01/2011

\*Enrollment Status:  [Show Combined Class Roster](#)

Enrollment Capacity: 15    Enrolled: 17

This functionality displays a **class roster** of all students on the combined classes.

## Printing Class Lists

This system functionality allows staff to run a system process to generate a printable class list in PDF format.

**Navigate To: Menu > Curriculum Management > Class Roster > Print Class Roster**

1. Select the **Add a New Value** search page and enter a **Run Control ID (RCI)** to identify your Class List and click **Add**.



Print Class Roster

Find an Existing Value Add a New Value

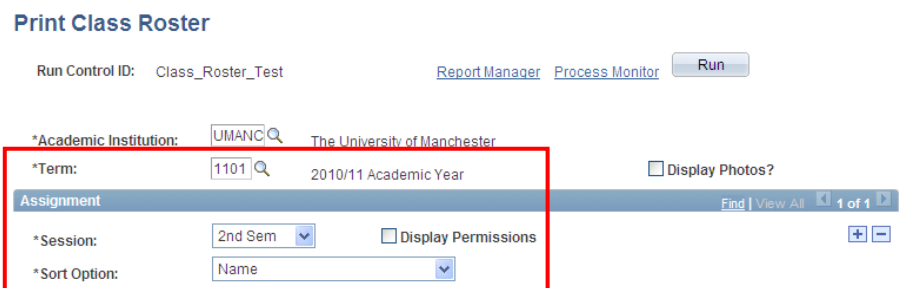
Run Control ID: Class\_List\_Test

Add

The **Print Class Roster** page will open by default.

2. Specify the criteria for the class:

- Enter/Select the required **Term**
- Enter/Select the appropriate **Session** (Semester 1, Semester 2 or Full Year)



Print Class Roster

Run Control ID: Class\_Roster\_Test Report Manager Process Monitor Run

\*Academic Institution: UMANC The University of Manchester

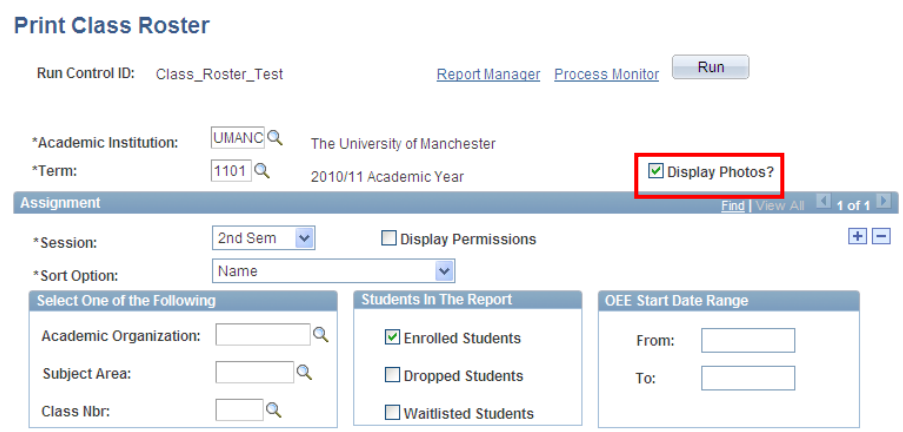
\*Term: 1101 2010/11 Academic Year ☐ Display Photos?

Assignment Find View All 1 of 1

\*Session: 2nd Sem ☐ Display Permissions

\*Sort Option: Name

**TRAINING NOTE:** It is no longer possible to download a class roster including student photos. Selecting the **Display Photo** checkbox will produce a class roster without photos.



Print Class Roster

Run Control ID: Class\_Roster\_Test Report Manager Process Monitor Run

\*Academic Institution: UMANC The University of Manchester

\*Term: 1101 2010/11 Academic Year ☒ Display Photos?

Assignment Find View All 1 of 1

\*Session: 2nd Sem ☐ Display Permissions

\*Sort Option: Name

Select One of the Following

Academic Organization: Subject Area: Class Nbr:

Students In The Report

☒ Enrolled Students ☐ Dropped Students ☐ Waitlisted Students

OEE Start Date Range

From: To:

3. You **MUST** enter **ONE** of the following sets of data to identify the specific class list to print:

- **Academic Organisation** – this will produce a list of all students enrolled on all classes within the specified Faculty/School.
- **Subject Area** – this will produce a list of all students enrolled on all classes within the specified Subject Area.
- **Class Nbr** – this will produce a list of all enrolled students on the specified Class.

#### Print Class Roster

Run Control ID: Class\_Roster\_Test [Report Manager](#) [Process Monitor](#) [Run](#)

\*Academic Institution:  The University of Manchester

\*Term:  2010/11 Academic Year ☐ Display Photos?

Assignment [Find](#) [View All](#) 1 of 1

\*Session:  ☐ Display Permissions [+](#) [-](#)

\*Sort Option:

Select One of the Following

Academic Organization:

Subject Area:

Class Nbr:

Students In The Report

☒ Enrolled Students

☐ Dropped Students

☐ Waitlisted Students

OEE Start Date Range

From:

To:

4. Select the type of student/s to include in the report – you can select one or more of the options.

**TRAINING NOTE:** Ignore the **From** and **To** date fields – this information is calculated automatically by the student system.

5. Once all criteria has been entered, click **Run**.

#### Print Class Roster

Run Control ID: Class\_Roster\_Test [Report Manager](#) [Process Monitor](#) [Run](#)

\*Academic Institution:  The University of Manchester

\*Term:  2010/11 Academic Year ☐ Display Photos?

Assignment [Find](#) [View All](#) 1 of 1

\*Session:  ☐ Display Permissions [+](#) [-](#)

\*Sort Option:

Select One of the Following

Academic Organization:

Subject Area:

Class Nbr:

Students In The Report

☒ Enrolled Students

☐ Dropped Students

☐ Waitlisted Students

OEE Start Date Range

From:

To:

- On the **Process Scheduler Request** page, select **UMANC Class Roster** and then click **OK**.

**Process Scheduler Request**

User ID: *Staff Details Withheld* Run Control ID: Class\_Roster\_Test

Server Name:  Run Date: 05/04/2011

Recurrence:  Run Time: 08:13:16

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	Class Roster	SRCLSRST	SQR Report	Web	PDF	Distribution
<input checked="" type="checkbox"/>	UMANC Class Roster	UMRPT009	Crystal	Web	PDF	Distribution

- This will return you to the previous page, where you now need to click **Process Monitor**.

### Print Class Roster

Run Control ID: Class\_Roster\_Test [Report Manager](#) [Process Monitor](#)

- Within the **Process List** section this job should be listed at the top. Click **Refresh** (or press the space bar) until you have a **Run Status** value of **Success** and a **Distribution Status** value of **Posted**.

**Process List** **Server List**

View Process Request For

User ID: *Staff Details Withheld*  Last  1 Days

Server:  Name:  Instance:  to

Run Status:  Distribution Status:  ☒ Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2936589		Crystal	UMRPT009	<i>Staff Details Withheld</i>	05/04/2011 08:13:16 BST	Success	Posted	Details
<input type="checkbox"/>	2936576		SQR Report	SRCLSRST	<i>Staff Details Withheld</i>	04/04/2011 15:40:06 BST	Success	Posted	Details

- Click **Details**.

**Process List** **Server List**

Customize | Find | View All |  | First | 1-2 of 2 | Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2936589		Crystal	UMRPT009	<i>Staff Details Withheld</i>	5/04/2011 08:13:16 BST	Success	Posted	Details
<input type="checkbox"/>	2936576		SQR Report	SRCLSRST	<i>Staff Details Withheld</i>	4/04/2011 15:40:06 BST	Success	Posted	Details

10. On the **Process Details** page, click **View Log/Trace**.

**Process Detail**

<b>Process</b>	
Instance: 2936589	Type: Crystal
Name: UMRPT009	Description: UMANC Class Roster
Run Status: Success	Distribution Status: Posted
<b>Run</b>	
Run Control ID: Class_Roster_Test	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSNTK2	<input type="radio"/> Cancel Request
Recurrence:	<input checked="" type="radio"/> Delete Request
	<input type="radio"/> Restart Request
<b>Date/Time</b>	
Request Created On: 05/04/2011 08:16:27 BST	<a href="#">Parameters</a>
Run Anytime After: 05/04/2011 08:13:16 BST	<a href="#">Message Log</a>
Began Process At: 05/04/2011 08:18:32 BST	<a href="#">Batch Timing</a>
Ended Process At: 05/04/2011 08:18:43 BST	<a href="#">View Log/Trace</a>

11. A **File List** will be displayed within the **File List** section. Select the **PDF File**.

**View Log/Trace**

**Report**

Report ID: 1841605 Process Instance: 2936589 [Message Log](#)

Name: UMRPT009 Process Type: Crystal

Run Status: Success

UMANC Class Roster

**Distribution Details**

Distribution Node: psreports\_nt Expiration Date: 19/04/2011

**File List**

Name	File Size (bytes)	Datetime Created
CDM_UMRPT009_2936589.pdf	0	05/04/2011 08:18:43.638899 BST
UMRPT009_2936589.PDF	43,575	05/04/2011 08:18:43.638899 BST
psreporttrace.trc	502	05/04/2011 08:18:43.638899 BST

**Distribute To**

Distribution ID Type	*Distribution ID
User	mwsszms

12. The **Class Roster** PDF file will open for you to save/print.

Report ID: CRCLRST PeopleSoft CLASS ROSTER REPORT Page No. 1

Run Date 04/05/2011

Run Time 08:28:06

The University of Manchester

Term/Session: 2010/11 Academic Year - 2nd Semester

Course: BIOL 20982 The Biology of Being Human (Lecture)

Class/Section: 16365 / LEC1

Instructor: Bownher, Caroline Grace; Levin, Daniel

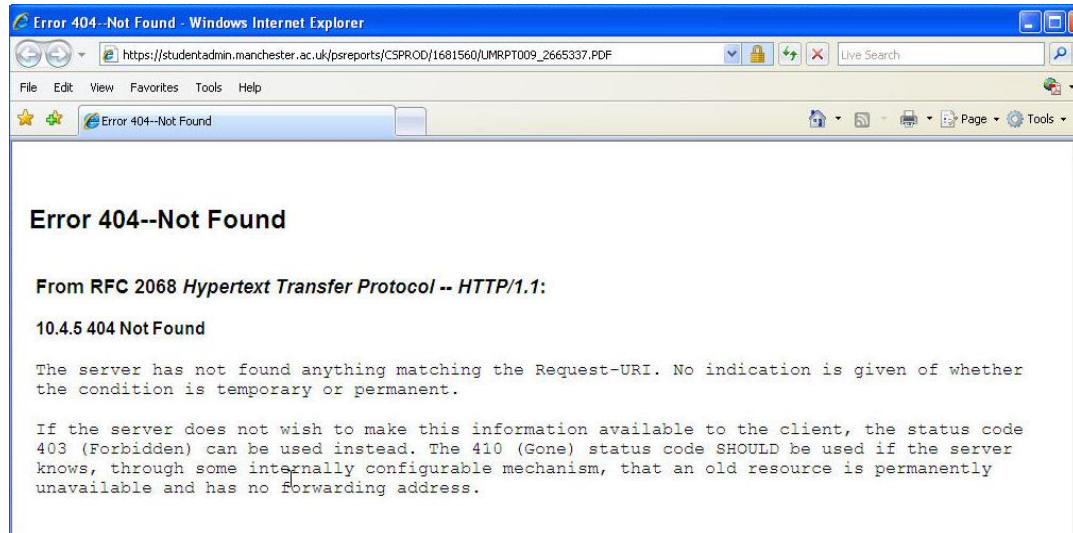
Class Dates: 01/11/2011 - 06/10/2011

**ENROLLED Students**

Student ID	Name	Basic	Units	Primary Academic Program	MAJOR	NOTE
UMK		10.00	BCc(Hons) Biology			
UMK		10.00	BCc Biol w/ Business & Manage			
UMK		10.00	BCc(Hons) Genetics			
UMK		10.00	BCc(Hons) Biology			
UMK		10.00	BCc(Hons) Genetics			
UMK		10.00	BCc(Hons) Developmental Biol			
UMK		10.00	BCc Biology with Sci & Society			
UMK		10.00	BCc(Hons) Biology			
UMK		10.00	BCc Biology with Sci & Society			
UMK		10.00	BCc Biol w/ Business & Manage			
UMK		10.00	BCc Biology with Sci & Society			
UMK		10.00	BCc(Hons) Zoology			
UMK		10.00	BCc(Hons) Biology			
UMK		10.00	BCc(Hons) Biology			
UMK		10.00	BCc(Hons) Zoology			
UMK		10.00	BCc(Hons) Zoology			
UMK		10.00	BCc(Hons) Genetics w Ind Exp			
UMK		10.00	BCc(Hons) Genetics w Ind Exp			
UMK		10.00	BCc(Hons) Biology			
UMK		10.00	BCc(Hons) Neuroscience			
UMK		10.00	BCc(Hons) Zoology w Ind Exp			

Student Details Withheld

**IMPORTANT TRAINING NOTE:** When selecting the PDF file, because it is such a large file the following error message may be displayed:



The 'Error 404' message appears whilst the server is still compiling the file. If this occurs, close the 'Error 404' window and wait for a short period of time until the process completes (approximately 3-5 minutes, dependant on file size).

Check the file again by selecting the PDF file. Once the process is complete, the **Class Roster** will display (as opposed to the 'Error 404' message).

## Producing an Ad-Hoc Transcript

This process allows you to produce an **Unofficial Academic Transcript** for a student.

**Navigate To: Menu > Records and Enrolment > Transcripts > Transcript Request**

1. Select the **Add a New Value** search page.

**Transcript Request**

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

[Find an Existing Value](#) [Add a New Value](#)

Limit the number of results to (up to 300):

Current User ID:

Report Request Nbr:

ID:

Academic Institution:

Transcript Type:

User ID:

Request Date:

Future Release:

Term:

Requested Print Date:

First Name:

Last Name:

☐ Case Sensitive

2. Enter the student **ID** in the **ID** field and click **Search**.

**Transcript Request**

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

[Find an Existing Value](#) [Add a New Value](#)

**Search Criteria**

\*Current User ID

Report Request Nbr

ID

Academic Institution

Transcript Type

User ID

Request Date

Future Release

Term

Requested Print Date

First Name

Last Name

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- The **Transcript Request** component will open by default within the **Requester Header** page, within the **Transcript Type** field, select the value of **UNOFF** (UMANC Unofficial Transcript) and the **Output Destination** field value of **Page**.

Request Header | Request Detail | Report Results | Report Errors

Report Request Nbr: 000000000 Request Date: 27/06/2012 User ID: *Staff Details Withheld*

\*Institution: UMANC The University of Manchester

\*Transcript Type: UNOFF UMANC Unofficial Transcript

☐ Freeze Record

☐ Override Service Indicator

\*Output Destination: Page

Number of Copies: 1

Future Release: Immediate Processing

Academic Career:

Term:

Print Date: 27/06/2012

Request Reason:

☐ Cancel Request

- Within the **Request Detail** page, enter the **ID** number of the student for whom you wish to generate the unofficial transcript for.

Request Header | Request Detail | Report Results | Report Errors

Report Request Nbr: 000000000 On Request

Transcript Type: UNOFF UMANC Unofficial Transcript

Process Request

Print

Report Manager

Find | View All | First | 1 of 1 | Last

\*Seq Nbr \*ID

1 Student Details Withheld

Send

- Click **Process Request** and the unofficial transcript will be displayed.

Request Header | Request Detail | Report Results | Report Errors

Report Request Nbr: 000000000 On Request

Transcript Type: UNOFF UMANC Unofficial Transcript

Process Request

Print

Report Manager

Find | View All | First | 1 of 1 | Last

\*Seq Nbr \*ID

1 Student Details Withheld

Send

Request Header | Request Detail | Report Results | Report Errors

Seq Nbr: 1

ID: Student Details Withheld

Print

Report Manager

UMANC Unofficial Transcript

Student ID: Student

1.1 Surname : Details

1.2 Firstname : Withheld

1.3 Birthdate : 19-01-1993

1.4 HESA ID : 1112041076579

Academic Program History

2.2 Program : BSc(Hons) Mathematics

4.1 Mode of Attendance : Full Time

Active in Program : 30-08-2011



- To create a downloadable version, click **Print**, and click **Report Manager**.

Request Header Request Detail Report Results Report Errors

Find View All 1 of 1

Seq Nbr: 1

ID: Student Details Withheld

Print

Report Manager

- Within the **Report Manager** page, click **Refresh** (or press the space bar) until you see the process (Transcript) displayed with a status value of **Posted**.

Administration

View Reports For

User ID: Staff Details Withheld Type: Last 1 Days Refresh

Status: Folder: Instance: to:

Report List Customize Find View All First 1 of 1 Last

Select	Report ID	Prca Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	2064547	3336133	Transcript - UMANC Version	05/07/2012 13:54:10	Acrobat (*.pdf)	Posted	Details

- Click the **Details** link alongside your Posted Transcript process.
- Within the **Report Detail** page, click the **PDF File** in the **File List** section to view the unofficial transcript in a new window – ready for printing.

Report Detail

Report

Report ID: 2064547 Process Instance: 3336133 Message Log

Name: UMSR777- Process Type: Crystal

Run Status: Success

Transcript - UMANC Version

Distribution Details

Distribution Node: psreports Expiration Date: 19/07/2012

File List

Name	File Size (bytes)	Datetime Created
CRW_UMSR777-3336133.log	0	05/07/2012 13:56:00.140601 BST
UMSR777-3336133.PDF	11,107	05/07/2012 13:56:00.140601 BST
pssqltrace.trc	501	05/07/2012 13:56:00.140601 BST

Distribute To

Distribution ID Type	*Distribution ID
User	Staff Details Withheld



Student ID: Staff Details Withheld

1.1 Surname :  
1.2 Firstname :  
1.3 Birthdate :  
1.4 HESA ID :

Academic Program History

2.2 Program : LLB Law with Criminology

4.1 Mode of Attendance : Full Time

Active in Program : 30-08-2011

End Date : 06-06-2014

Beginning of Undergraduate Record

Module Code	Module Title	Credits (Attempted)	Grade
LAWS 10001	Crime and Society	20.00	
LAWS 10021	Contract Law	20.00	
LAWS 10051	Legal Methods and Systems	20.00	
LAWS 10042	Tort	20.00	
LAWS 10082	Criminal Law (Criminology)	20.00	
LAWS 10432	Psychology, Crime and Criminal Justice	20.00	

## Student Personal Data

### Editing an Address

**Navigate To:** Menu > Campus Community > Personal Information (Student) > Biographical (Student) > Addresses/Phones > Addresses

**i** To view/edit personal data in one place navigate to **Campus Community > Personal Information (Student) > Add/Update a Person** (apart from Emergency Contacts and Disability Details which can only be accessed by navigating to these areas individually).

1. Enter the student **ID** in the **ID** field.

**TRAINING NOTE:** Select the Correct History checkbox if you are going to be making a change to an existing address.

2. Click **Search**.

Addresses

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

Find an Existing Value

Limit the number of results to (up to 300): 300

Empl ID: begins with 1234567

Academic Career: =

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Include History ☒ Correct History ☐ Case Sensitive

**Search** Clear Basic Search Save Search Criteria

The **Addresses** page will open by default.

3. Click the **Edit/View Address Detail** link for the address that you wish to amend.

**i** **IMPORTANT NOTE:** Halls of Residence addresses **MUST not** be changed – these will be maintained by the accommodation office.

Addresses	
Student Details Withheld	
Address Type	Address
Home	Student Details Withheld

Effective Date	Status	Updated By	Updated	Edit/View Address Detail
22/09/2010	Active		22/09/2010 13:17:37	<b>Edit/View Address Detail</b>

4. This will then open up the **Address History** page for that specific address type. Insert a new row of data.

Address History

Effective Date	Country	Status	Address
19/10/2010			Student Details Withheld

Updated By: 19/10/2010 00:00:00

Update Addresses Address Linkage

**Add**

- Within the new row of data, the system by default automatically re-inserts the same address, so that if you are making a minor modification you do not have to re-type the entire address out again. Update the **Effective Date** to record the date the change is effective from.

Effective Date	Country	Status	Address	
05/04/2011			Student Details Withheld	<a href="#">Update Addresses</a>
19/10/2010			Student Details Withheld	<a href="#">Update Addresses</a> <a href="#">Address Linkage</a>

- Click **Update Addresses**. You will then be taken to the **Edit Address** page where any necessary changes can be recorded.

Country: United Kingdom [Change Country](#)

Address 1: 123 Campus Road

Address 2:

Address 3:

Address 4:

Town/City: Manchester County: GTMAN Postcode: M12 3AA [Find Your Postcode](#)

- Once you have made your amendments, click **OK**. You will be taken back to the **Address History** page.

Effective Date	Country	Status	Address	
05/04/2011	GBR	Active	123 Peoplesoft Road Manchester M12 3AA Greater Manchester	<a href="#">Update Addresses</a> <a href="#">Address Linkage</a>
19/10/2010			Student Details Withheld	<a href="#">Update Addresses</a> <a href="#">Address Linkage</a>



Note: you cannot have 2 or more addresses of the same type with the same **Effective Date**. These values **MUST** be unique in order for the system to determine the current record.

8. The updated address should display within the **Current Addresses** section. Click **Save**.

Current Addresses

Customize | Flag | View all

Page 1 of 2

Address Type	Address	Effective Date	Status	Updated By	Updated	Edit/View Address Detail
Home	Student Details Withheld				22/09/2010 13:17:37	Edit/View Address Detail
Term Time	123 Peoplesoft Road Manchester M12 3AA Greater Manchester	05/04/2011	Active	Staff Details Withheld		Edit/View Address Detail

Add Address

Effective Date: 05/04/2011 Status: Active

Country: GBR United Kingdom

Address: [Edit Address](#) [Address Linkage](#)

Submit

Reset

Add Address Types

☐ Home

☐ Mailing

☐ Term Time

☐ Placement

☐ Billing

☐ Degree

\* Active address exists  
[Explain](#)

Save

[Return to Search](#)

[Notify](#)

[Refresh](#)

[Update/Display](#)

[Include History](#)

[Correct History](#)

## Adding an Address

**Navigate To: Menu > Campus Community > Personal Information (Student) > Biographical (Student) > Addresses/Phones > Addresses**

1. Enter the student **ID** number in the **ID** field and click **Save**.

**Addresses**

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

[Find an Existing Value](#)

---

Limit the number of results to (up to 300):

Empl ID:

Academic Career:

National ID:

Campus ID:

Last Name:

First Name:

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

The **Addresses** page will open by default:

**Addresses**

*Student Details Withheld*

Address Type	Address	Effective Date	Status	Updated By	Updated	Edit/View Address Detail
Home	4321 Test Road Ripley DE5 8RD Derbyshire	22/09/2010	Active	Staff Details Withheld	05/04/2011 11:42:14	<a href="#">Edit/View Address Detail</a>
Term Time	123 Peoplesoft Road Manchester M12 3AA Greater Manchester	05/04/2011	Active		05/04/2011 11:38:48	<a href="#">Edit/View Address Detail</a>

**Add Address**

Effective Date:   Status:

Country:   United Kingdom

Address: [Edit Address](#) [Address Linkage](#)

**Add Address Types**

☐ \* Home

☐ Mailing

☐ \* Term Time

☐ Placement

☐ Billing

☐ Degree

\* Active address exists  
[Explain](#)

2. In the **Add Address Types** section, select the checkbox of the type of address to be added and click the **Edit Address** link.

**Add Address**

Effective Date:   Status:

Country:   United Kingdom

Address: [Edit Address](#) [Address Linkage](#)

**Add Address Types**

☐ \* Home

☒ Mailing

☐ \* Term Time

☐ Placement

☐ Billing

☐ Degree

\* Active address exists  
[Explain](#)

You will now be presented with a null/blank address entry page for you to enter the details of the new address.

**Edit Address**

Country: United Kingdom [Change Country](#)

Address 1: Flat 123

Address 2: A Street Somewhere

Address 3:

Address 4:

Town/City: Manchester County: GTMAN Postcode: M00 1AB [Find Your Postcode](#)

**OK** Cancel

- Entered the address detail and click **OK**.
- You will then be returned to the main address page where you will see your newly entered address. Click **Submit**.

**Current Addresses** Customize | End | View All | First 1-2 of 2 Last

Address Type	Address	Effective Date	Status	Updated By	Updated	Edit/View Address Detail
Home	4321 Test Road Ripley DE5 8RD Derbyshire	22/09/2010	Active	Staff Details Withheld	05/04/2011 11:42:14	<a href="#">Edit/View Address Detail</a>
Term Time	123 Peoplesoft Road Manchester M12 3AA Greater Manchester	05/04/2011	Active		05/04/2011 11:38:48	<a href="#">Edit/View Address Detail</a>

**Add Address**

Effective Date: 05/04/2011 Status: Active

Country: GBR United Kingdom

Address: [Edit Address](#) [Address Linkage](#)  
Flat 123  
A Street Somewhere  
Manchester  
M00 1AB Greater Manchester

**Submit** Reset

**Add Address Types**

- ☐ Home
- ☒ Mailing
- ☐ Term Time
- ☐ Placement
- ☐ Billing
- ☐ Degree

\* Active address exists [Explain](#)

- You will see that the address now appears in the top section of the screen.

**Current Addresses** Customize | End | View 2 | First 1-3 of 3 Last

Address Type	Address	Effective Date	Status	Updated By	Updated	Edit/View Address Detail
Home	4321 Test Road Ripley DE5 8RD Derbyshire	22/09/2010	Active	Staff Details Withheld	05/04/2011 11:42:14	<a href="#">Edit/View Address Detail</a>
Mailing	Flat 123 A Street Somewhere Manchester M00 1AB Greater Manchester	05/04/2011	Active		05/04/2011 12:08:08	<a href="#">Edit/View Address Detail</a>
Term Time	123 Peoplesoft Road Manchester M12 3AA Greater Manchester	05/04/2011	Active		05/04/2011 11:38:48	<a href="#">Edit/View Address Detail</a>

**Add Address**

Effective Date: 05/04/2011 Status: Active

Country: GBR United Kingdom

Address: [Edit Address](#) [Address Linkage](#)

**Submit** Reset

**Add Address Types**

- ☐ Home
- ☐ Mailing
- ☐ Term Time
- ☐ Placement
- ☐ Billing
- ☐ Degree

\* Active address exists [Explain](#)

- If you wish to add in another address, click **Reset** and repeat steps 2 - 5.
- Click **Save**.

## Adding or Editing an Email Address

**Navigate To: Menu > Campus Community > Personal Information (Student) > Biographical (Student) > Addresses/Phones > Electronic Addresses**

1. Enter the student **ID** number in the **ID** field and click **Search**.

**Electronic Addresses**

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

Find an Existing Value \_\_\_\_\_

Limit the number of results to (up to 300): 300

Empl ID: begins with 1234567

Academic Career: =

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Case Sensitive

**Search** Clear Basic Search Save Search Criteria

The **Electronic Addresses** page will open by default.

2. To edit an email address, simply overwrite the existing information.

**Electronic Addresses**

*Student Details Withheld*

Email Information		
Email Type	Email Address	Preferred
University	cs.test@manchester.ac.uk	<input checked="" type="checkbox"/>
Home	cs.test@manchester.ac.uk	<input type="checkbox"/>

Add

3. To insert a new email address click **Add** to insert a new row of data.
4. Select the type of email address you wish to add from the **Email Type** field options and then enter the email address in the **email address** field.

**Electronic Addresses**

Zivai Muyengwa 7910201

Email Information		
Email Type	Email Address	Preferred
University	cs.test@manchester.ac.uk	<input checked="" type="checkbox"/>
Home	cs.test@manchester.ac.uk	<input type="checkbox"/>
Other	another@hotmail.com	<input type="checkbox"/>

Add

**i** Note that the University email address will always default as the 'Preferred' address, and so this should not be changed.

5. Click **Save**.

## Adding or Editing a Phone Number

**Navigate To: Menu > Campus Community > Personal Information (Student) > Biographical (Student) > Addresses/Phones > Phones**

1. Enter the student **ID** number in the **ID** field and click **Search**.

### Phones

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

Find an Existing Value

Limit the number of results to (up to 300): 300

Empl ID: begins with 1234567

Academic Career: =

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Case Sensitive

**Search** Clear Basic Search Save Search Criteria

The **Phone Numbers** page will open by default.

2. To edit a phone number, simply overtype the existing information.

### Phone Numbers

Student Details Withheld

Phone Detail	Phone Type	Phone Number	Extension	Country Code	Preferred	
	Home	Student Details Withheld		044	<input checked="" type="checkbox"/>	-
	Mobile	Student Details Withheld		044	<input type="checkbox"/>	-

**Add**

3. To insert a new phone number, click **Add** to insert a new row of data to work with.
4. Select the type of phone number you wish to add from the **Phone Type** options and enter the phone number in the field provided.

### Phone Numbers

Student Details Withheld

Phone Detail	Phone Type	Phone Number	Extension	Country Code	Preferred	
	Home	Student Details Withheld		044	<input checked="" type="checkbox"/>	-
	Mobile	Student Details Withheld		044	<input type="checkbox"/>	-
	<b>Term</b>				<input type="checkbox"/>	-

**Add**

**IMPORTANT NOTE:** One phone number **MUST** be selected as the 'Preferred' number, change this if required.

5. Click **Save**.



## Adding or Editing a Name

Note that you should not change the primary name in the system before seeing proof (such as marriage certificate; deed poll certificate; etc).

Any changes to a student's primary name must also be confirmed with the IT Data Quality Team; if this step is not completed, then the name will revert to the previous row overnight.

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

1. Enter the student **ID** number in the **ID** field and click Search.

**IMPORTANT NOTE:** *if you are going to be making a change to an existing name, select the **Correct History** checkbox.*

**Names**

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

Find an Existing Value

Limit the number of results to (up to 300): 300

Empl ID: begins with 1234567

Academic Career: =

National ID: begins with

Campus ID: begins with

Last Name: begins with

First Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

**Search** Clear Basic Search Save Search Criteria

The Names page will open by default, where you will see any current names for the individual listed.

**Names**

*Student Details Withheld*

Status	Updated By	Updated	Name History
Active		22/09/2010 13:17:37	<a href="#">Name History</a>

Add/change a name

Type of Name:

Effective Date: 05/04/2011

\*Format Using: English [Change Format](#)

Status: Active

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Display Name:

Formal Name:

Name:

**Submit** **Reset**

2. From the **Type of Name** options, select the name type that you wish to insert/amend (to amend an existing name, select the existing name type). The **Effective Date** will default to today's date – this can be updated as required.

Add/change a name

Type of Name: Preferred

Effective Date: 05/04/2011

3. Enter the name information, as required – you will see that you can enter a **Prefix**, **First**, **Middle** and **Last Name**, along with a name **Suffix**.

Prefix: Ms  
 First Name: Student Details Withheld  
 Last Name:   
 Middle Name:   
 Suffix:   
 Display Name:   
 Formal Name:   
 Name:   
 Submit Reset

4. Once you have entered the necessary fields, click **Submit**.

Current Names						
Name Type	Name	Effective Date	Status	Updated By	Updated	Name History
Primary	Student Details Withheld	22/09/2010	Active		22/09/2010 13:17:37	<a href="#">Name History</a>
Preferred		05/04/2011	Active			<a href="#">Name History</a>

5. The inserted name will appear at the top of the **Current Names** section. (If you have amended an existing name, you should just see that this has now been altered, along with the new effective date – you will NOT see an additional data row).
6. Click **Save**.

Save Return to Search Notify

#### TRAINING NOTE:

Preferred names can be recorded in Campus Solutions but will not show in most other systems. The Primary name cannot be overwritten with a preferred name that is not on documentation – the Primary name must reflect the student's Legal Name.

7. Email [data.quality@manchester.ac.uk](mailto:data.quality@manchester.ac.uk) with confirmation of the Student ID number and the new name, so that this can be updated in the CRM SPOT system.

## Recording a Single Name

In the majority of countries a person will have a name followed by a family name. There are a number of countries where a person can legitimately have one single name.

For students who have a single name and have proof of this i.e. passport etc, this is the process for updating Campus Solutions (CS) to display the single name:

### Recording Single Names in Campus Solutions

The CS Student System requires both the first name and surname fields to be populated which poses a problem when recording students with a single name.

To ensure that all search facilities within Campus Solutions are available and to support integration with other internal and external systems the following protocol must be adopted when recording single names:

First Name Field: '-' recorded

Surname Field: single name recorded

The screenshot shows a form with the following fields: Prefix (dropdown), First Name (text), Middle Name (text), Last Name (text), Suffix (dropdown), Display Name (text with a refresh icon), Formal Name (text), and Name (text). Two red arrows point from the '!' annotation to the First Name and Last Name fields. A blue annotation '!' is placed next to the First Name field. A blue annotation '!' is placed next to the Last Name field. A blue annotation '!' is placed next to the Display Name field.

Prefix:

First Name:  Middle Name:

Last Name:

Suffix:

Display Name:  single name recorded in SURNAME field only

Formal Name:

Name:

*This process has been agreed by all affected areas and approved by the SAMG Student Records Group (October 2012).*

## Emergency Contacts

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

1. Enter the student **ID** number in **ID** field and click **Search**.

The screenshot shows the 'Emergency Contacts' search interface. At the top, it says 'Find an Existing Value'. Below this, there's a search criteria section with fields for 'Empl ID:', 'Academic Career:', 'National ID:', 'Campus ID:', 'Last Name:', and 'First Name:'. Each field has a dropdown menu with 'begins with' selected. The 'Empl ID' field contains the value '1234567'. There is a 'Search' button at the bottom left, which is highlighted with a red box. Other buttons include 'Clear', 'Basic Search', and 'Save Search Criteria'.

The **Emergency Contacts** page will open by default, where any existing contact information will be displayed.

The screenshot shows the 'Emergency Contact' form. It has two tabs: 'Emergency Contact Information' and 'Emergency Contact Other Phones'. The 'Emergency Contact Information' tab is active. The form displays a single contact with the name 'Student Details Withheld'. The 'Relationship' is set to 'Sibling'. There are checkboxes for 'Primary Contact', 'Same Address as Individual', and 'Same Phone as Individual'. The 'Contact Address' section shows 'Country: GBR' and 'United Kingdom'. The 'Contact Phone' section shows 'Phone: Student Details Withheld'. The 'Find' button at the top right is highlighted with a red box.

2. Insert a new row of data to add a new contact.

The screenshot shows the 'Emergency Contact' form with two contacts. The first contact is 'Student Details Withheld' with a 'Parent' relationship. The second contact is 'Joe Bloggs' with a 'Cohabitee' relationship. The 'Find' button at the top right is highlighted with a red box.

3. In the **Contact Name** field, insert the contact name and select the correct **Relationship** value to the student from the available system options.

The screenshot shows the 'Emergency Contact' form with the 'Contact Name' field containing 'Joe Bloggs' and the 'Relationship' dropdown menu set to 'Cohabitee'. The 'Find' button at the top right is highlighted with a red box.

- If the contact resides at the same address as the student, and/or has the same telephone number, then you can tick the **Same Address** and **Same Phone Number** check-boxes and choose the relevant **address** and **phone** types from the selection list, enabling this information to default in for you.

The screenshot shows the 'Emergency Contact' form for 'Joe Bloggs'. The relationship is 'Cohabitee'. The 'Primary Contact' checkbox is unchecked. The 'Same Address as Individual' and 'Same Phone as Individual' checkboxes are both checked. The 'Address Type' is set to 'HOME' and the 'Phone Type' is set to 'HOME'. Below this, the 'Individual's Current Address' is displayed: Country: GBR United Kingdom, Address: 4321 Test Road, Ripley, DE5 8RD Derbyshire. The 'Individual's Phone' section shows 'Telephone: Student Details Withheld'.

- If you are adding a new address for the contact, then in the **Contact Address** section, enter the relevant **Country**, and click **Edit Address**.

The screenshot shows the 'Contact Address' section. The 'Country' is set to 'GBR' with a search icon and 'United Kingdom'. The 'Address' field is empty. The 'Edit Address' button is highlighted with a red box.

- This will then open up the **Edit Address** page where you **MUST** enter the address and click **OK**.

The screenshot shows the 'Edit Address' page. The 'Country' is set to 'United Kingdom' with a 'Change Country' link. The 'Address 1' field is empty, and 'Address 2', 'Address 3', and 'Address 4' are also empty. The 'Town/City' is set to 'London', 'County' is empty, and 'Postcode' is set to 'Student Details Withheld'. There is a 'Find Your Postcode' link. The 'OK' button is highlighted with a red box, and the 'Cancel' button is also visible.

- You will be returned to the **Emergency Contacts** page, with the address displayed. You can now enter a **Phone** number in the **Phone** field, specifying an **Extension** (where necessary).

The screenshot shows the 'Contact Phone' section. The 'Phone' field is empty, and the 'Extension' field is also empty.

8. To insert additional phone number/s for the contact, select the **Emergency Contacts Other Phones** page.

Emergency Contact Information | **Emergency Contact Other Phones**

*Student Details Withheld*

Description Find | View All First 1 of 1 Last

Contact Name: *Student Details Withheld* + -

Relationship: Sibling ☒ Primary Contact

Other Phone Numbers for Emergency Contact Find | View All First 1 of 1 Last

*Phone Type	Phone	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>

9. Enter/Select the **Phone Type** from the system options, insert the phone number in the **Phone** field and records an **Extension** where necessary. Click **Save**.

**Save** Return to Search Notify

## Disability Details



Disability information will **ONLY** display in this component if student has given consent for details of the disability to be released.

**IMPORTANT NOTE:** This information is **ONLY** available in **VIEW ONLY** format. You will not be able to amend any information within this component, as this is managed by the central Disability Support Office.

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

1. Enter the student **ID** number in the **ID** field and click **Search**.

### Disability Details

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

Find an Existing Value

Limit the number of results to (up to 300):

ID:

Campus ID:

National ID:

Last Name:

First Name:

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

2. The **Disability Details** component will open by default.

## Impairment Regional

Student Details Withheld

☒ Existence of Disability

☒ Request Support

Support Services Request

### Details

Type of Impairment

Where disability information is available for a student, the **Existence of Disability** checkbox displayed will be selected. If support has been requested by the student, the **Request Support** checkbox displayed will also be selected, and the **Support Services Request** field will display the appropriate value for the student.

In the **Details** section of the page, the **Type of Impairment** field displays the student's impairment/s.

In the example above, the student has a disability and has requested support, the **Support Services Request** field displays that the student is **in receipt of DSA (Disability Support Allowance)** and the Type of Impairment field displays the value of **Other disability (not listed)**.