Student Services Center

There is a new summary page delivered that can be used as a supplement to the other pages. Some data from different pages is put together on a single page. If additional data is needed that is not in the Student Services Center, then the specific page can still be viewed.

Following this navigation, using the side bar menu, select Student Services Center:
Basic Student Information-Student Services Center

A search window will appear. Type in the ID, Campus ID or name information to find the student of interest.
The **Student Center** tab will appear with information about the student. The Student Center tab is very similar to what the student will see when they sign on to Enroll and Pay. There are several differences in a staff vs. student view of the Student Center tab. Students see links to change enrollment under the Academics area. They will also see the option to “Add a Class” and “Drop a Class.” Many of the options staff see are not active links while they are active for the student. With an active link, the student can drill down and see additional information. One example of this is the Print/View a Bill link under Finances. In addition to the Student Center tab, staff may have access to tabs for General Info, Academics, Finances, Financial Aid and Transfer Credit. The tabs that a staff person will see are based on the training they have attended and the access they have been given. Training on the Finances tab will be offered through student financials training and will not be provided here. Students do not see the additional tabs, only the Student Center tab. The class schedule, account summary, hold and contact information under the various highlighted headers is exactly the same as the student will see.
The **General Info** tab has service indicators (which are holds on the student's account), national id, addresses, email addresses, initiated checklists, personal data, names and phones. Although you can see the student’s university registered email address the student does not see this and does not change this information through Enroll and Pay.

Each area can be reached through these links. The screen shot below only shows part of the page. Scroll down to see all the areas.

- **Service Indicators**
  - Positive
  - Negative

- **Initiated Checklists**
  - No initiated checklists found.

- **Student Groups**
  - No student groups found.

- **Personal Data**
  - Campus ID: 223456
  - Date of Birth: 01/02
  - Gender: Male
  - Marital Status: Single

- **National ID**
  - Country Type
  - National ID

The green arrow will collapse individual areas. Or all areas can be collapsed with the Collapse All button.

The green edit box when selected will go to the page that has detailed information for that area.
The **Academics** tab shows course career/program/plan, level, term and enrollment information.

This shows the students current program and career. If the student has/had multiple careers it will show all of them. Click on the “edit program data” button to see additional programs. If the student has multiple plans (degrees/majors, minors or co-majors) under the program all of them will be displayed. The next three screen shots all make up the academics tab.

Further down the page the term summary will be displayed. This is similar to term history and the “edit term data” button will go to the term activation page. The term highlighted in yellow on the left is the term data that is then shown on the right. Click a different term on the left to change the information on the right. The primary program is show here and the academic level.
Below the Level/Load information are the courses (classes) that the student is enrolled in for that semester. If grades are posted they will be shown here. Below the class enrollments are the hours and gpa information for the student for the term selected and the Cum total through that term (statistics).

The **Transfer Credit** tab shows summary information on transfer credit including course and test credits. Detailed information will need to be found under Records and Enrollment>Transfer Credit Evaluation.
Click on the statistics tab to see the number of hours transferred from the listed source.
Biographical Details

Following this navigation, using the side bar menu, select Add/Update a Person

Basic Student Information → Add/Update a Person

• Person Information:
  - Prefix: will not be used.
  - Name: each piece of the student’s name will be entered into the appropriate field – First, Middle, Last. These fields are case sensitive and can include special characters, such as hyphens, apostrophes and periods. The Oracle name format is: lastname,firstname middlename. The student’s Primary Name type is their official record name. Note: If a middle initial is used a period will follow it. For students that only have one name: only has a Last Name, that data will be in the last name field and a dash in the first name field; only has a First Name, that data will be in the first name field and a dash in the last name field. Sometimes HR enters FNU (first name unknown) in the First Name field, but will be changed in the Enroll &Pay system using a dash, as described above. All students that have the dash in the Last Name field will also have a Campus ID of ‘NOLASTNAME’ and since we are unable to search for last names of ‘-‘, you will need to use the Campus ID field to perform a name search.
  - Suffix: will be used if provided by the student and should never be put in the Last Name field.
  - Date of Birth: will be entered as MMDDYYYY. 1950 and prior years must have the entire four-digit year typed out or the year will default using the 2000 century (ex: 1940 will default in as 2040 if the entire four-digit year is not entered). If the date of birth is unknown this field will be left blank.
  - Birth Information Link: If known, birth location (city), country and state.
  - Campus ID: the student’s previous KUID number from the legacy system. Former numbers will be entered if they exist.
- **Biographical History:** can have multiple effective dated rows by clicking on the + button.
  - **Effective Date:** will default to today's date.
  - **Marital Status:** will default to single for new applicants and will not be changed unless it is information collected on the application by a specific admissions office or by the registrar's office.
  - **As of:** will be left blank unless exact date of the change in status is known.
  - **Gender:** will default to *Unknown.* "F" or "M" will be used to specify the correct gender of the student. If gender is not available, this field will be left as *Unknown.*
- **National ID:** is the student’s social security number. The country will default to USA and the National ID Type will default to Social Security Number. The 9-digit number will automatically be formatted. If the student does not have a SSN this field will be left blank and X’s will default in this field.
  - Multiple ID’s can be entered for a student if they also have a national ID number from another country. If more than one row is entered, the USA row must be checked as **primary.**
  - Multiple row functionality is not being used at this time for the National ID field.

- **Contact Information:**
  - **Phone:** A student can have multiple phone types with different numbers.
    - **Each type** can have only one phone number associated with it at a given time because these fields are not effective dated.
    - **Preferred Checkbox:** one phone number will be checked as Preferred if the student has multiple phone numbers. We will use a hierarchy of JH WK, PERM, HOME, to determine which phone type should be checked as Preferred if more than one phone type exists.
    - **Country Code:** can be entered for international numbers, but is not required.

- **Email:** A student can have multiple email types with different email addresses.
Each type can have only one email address associated with it at a given time because these fields are not effective dated.

Admissions will use the email type of HOME.

Preferred Checkbox: KULC and KUMC email addresses are populated nightly. Entry of these is not needed. This process will use a hierarchy of KUMC, KULC, HOME, to determine which email type should be checked as Preferred if more than one email type exists.

Visa/Permit Data Page

This page is accessed by clicking on the Visa/Permit Data link located at the bottom of the Biographical Details page.

- **Country** will always be USA.
- **Type** is the type of Visa the student was issued to enter the United States.
  - This information will be entered by the International Student and Scholar Services Office for Lawrence students and by the Registrar’s Office for Medical Center students.
  - This data is interfaced to another system and sent to the Federal Government.
- **Status** will default to Applied when originally entered by Admissions.
- The rest of the fields will not be used.
- Click OK to return to the Biographical Details page.

Citizenship Page

This page is accessed by clicking on the Citizenship link located at the bottom of the Biographical Details page.

- The **country** of citizenship will default to USA and the **citizenship status** will default to native.
  - Resident aliens (applicants with Green cards) will be coded Alien Perm with a country code of USA.
  - International students will be entered as Alien Temp. If the status is Alien Temp, the **Country** code will be the student’s county of citizenship.

Multiple countries w/ citizenship status: at this time students can have only one row of information entered. In the future, multiple rows for citizenship statuses in the USA and the country of citizenship will be entered.

- **Passport information**: is not used at this time.
- Click on OK to return to the Biographical Details page.
Addresses:

- **Address Type:**
  - **Home** is defined as the current mailing address of the applicant.
  - **Permanent** is defined as the student’s permanent address.
  - **Other** is the Sponsor’s address for international students.
  - **Hometown** is defined as a way to track the origins of our students by Institutional Research with Admissions usually updating the information, but the Registrar’s Office may update the information upon the request of the student.

  **HOME** and **PERM** address types are required for all applicants.

  Registrar will use three types of address:
  - **Jayhawk/Current** is defined as the student’s current mailing address.
  - **Permanent** is defined as the student’s permanent address – often the parent’s address.
  - **Billing** is defined as the student’s billing address.

The **Campus** address type is updated nightly from housing information. If a student needs to update this address type, then they will need to contact Student Housing. The **Other** address type is defined as any additional addresses a student wants us to know about like a sponsor or a P.O. Box, but will not be used in batch mailings. **Deceased, Transcript Requestor, Commencement, HomeTown City/State and Check** are address types only used in special functionalities/processes and are updated only by individuals with specific duties.

Clicking on the Edit/View Address Detail link to the right of an Address Type, will allow you to see any historical rows of address changes. The Add Address and Add Address Types are areas only used for those that can update addresses, so will be non-functional for ‘view’ access.
- **Regional:**
- **Regulatory Region:** will default to USA.
- **Ethnic Group:** will default to *NSPEC* (Not Specified) and will be used when the student doesn’t list this information. If the student provides multiple ethnicities, all of them will be entered.
  
  📘 If multiple ethnicities are entered, **one** of them will be checked as Primary.

- **History (Military Status):** For applicants, this information is loaded from the application. Any updates to this information should **only** be done by the Veteran Affairs Office.

- **Hispanic or Latino Checkbox:** If the student indicates they are Hispanic, this checkbox will be checked. If this checkbox is checked, the ethnic group of *HISPA* will also be entered regardless of the total number of Ethnic Groups on the student’s record.
Emergency Contacts

The Emergency Contacts page provides information about which individual(s) that a student wishes to have contacted in case of emergency. Students are able to update this information within Self Service.

Following this navigation, select Emergency Contacts:
Basic Student Information>Emergency Contacts

There are several search options available here.

- Enter the student EmplID
  Or
- Enter the Academic Career
  Or
- Enter the National ID (Social Security number)
  Or
- Enter the Campus ID (former system ID or KUID)
  Or
- Enter a Last Name and all or part of a First Name

If the Student EmplID is available, it is the most efficient way to search for a record.

After choosing the search method and entering criteria, press the Search button.

If names are used for the search, you may get a Search Results list.

To select a student, click on any field on the line for the appropriate student.

The Emergency Contacts page will open:
The Emergency Contacts page has two components: Emergency Contact Information and Emergency Contact Other Phones.

On the Emergency Contact Information page, the following fields will have data:

- **Contact Name** (required field—First Name Last Name). Enter the name of the Emergency Contact.
- **Relationship** (required field). Use the drop down menu to choose the relationship of the Emergency Contact to the student.
- **Primary Contact checkbox**. If the student designates the contact being entered as the primary contact (the one to be contacted first in case of emergency), this box should be checked.
- **Same Address as Individual and Same Phone as Individual checkboxes**. Check either of these two boxes if the contact address and phone are the same as the student’s HOME address type and phone type. Checking either of these two boxes will populate the address fields with the student’s HOME address type and phone type.
In the Individual’s Current Address section, the following fields will need to be filled in.

- Country. Type the country code and tab out of the field to activate the Address 1, Address 2, Address 3, City, State, County and Postal Code fields. To look up the country code, use the magnifying glass.
- USA formatting allows for three street address lines. For mailing purposes we will only use line 1 and 2. **Do not enter information on line 3** if you are using standard sized window envelopes or labels. We will also use other formatting guidelines as much as possible for consistency:
  - Address information will not entered on line 2 if the entire address will fit on line 1.
  - Addresses are case sensitive.
  - Admissions and IPC will shorten all street names: St, Ct, Dr, Ave, Terr, Tr, Rd, Ln, etc. No periods will be used.
  - Apartment numbers will be indicated using the # sign.
  - City names beginning with Saint and Fort will be shortened: St, Ft (No periods will be used).
- Individual’s Phone. Enter the phone number (including area code) for the name listed in the Contact Name field.

<table>
<thead>
<tr>
<th>Emergency Contact Information</th>
<th>Emergency Contact Other Phones</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joe Training</td>
<td>1234567</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name:</td>
<td>Dustin Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship:</td>
<td>Father</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Phone Numbers for Emergency Contact</th>
<th>First</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Type</td>
<td>Phone</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cellular</td>
<td>7855556-1111</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In the Emergency Contact Other Phones component, if needed can list:

- One or multiple Phone Types and Phones
Relationships Page

Following this navigation, select Relationships:
Basic Student Information → Relationships

The Relationships tab will be used to record the name(s) and address(es) of a student’s parents and/or guardians. This page does allow for data entry of multiple parents/guardians living at different addresses.

- **Effective Date**: relationship information is effective dated. Today’s date will default in to this field, however, this date in this may reflect future changes.

- **Status**: is used to indicate if a relationship is active or inactive.

- **Related ID**: is the ID of the parent or guardian if they exist in the SAKU database. This field is being used by Financial Aid to create parent records related to loans.

  🧙‍♂️ At NO TIME will the Registrar’s Office enter the ID number of the parent or guardian on a relationship record.

  😶 At NO TIME will the Registrar’s Office update a relationship record where the Related ID field is entered. This specific record belongs to Financial Aid.

- **Relationship**: will not be used, but will default None Indi.

- **Name**: is the name(s) of the parents/guardians. Data entry will use standard PS parsing rules: LastName,FirstName Middle. Depending on the information provided by the student on the application, the following guidelines should be used for entering relationship names:
- Two parents with the same last name, two first names provided, same address: enter last name, father’s first name and mother’s first name and leave prefix field blank.
  
  \textit{Example: Smith, John and Mary}

- Two parents with different last names and same address: enter father’s last name, mother’s first name, mother’s last name and father’s first name, and leave the prefix field blank.
  
  \textit{Example: Smith, Mary Jones and John}

- Two parents with same last name but only the father’s first name is given: enter last name, father’s first name, and choose “Mr. and Mrs.” from the prefix field.
  
  \textit{Example: Smith, John}

- Single parent: enter last name, first name, and choose “Mr.” or “Ms.” from the prefix field.
  
  \textit{Example: Jones, Mary}

- If two parents / guardians with different addresses are given: enter the first name following the above guidelines, then use the ADD procedure to enter the next name using the same naming guidelines.

  \begin{itemize}
  \item If two parents / guardians with different addresses are given: enter each record use the directions given for ADDING a new relationship record (see page 3), and follow the naming conventions above.
  \end{itemize}

- \textbf{Prefix}: will only be used in certain circumstances.

- \textbf{Suffix}: will not be used.

- \textbf{Sex}: will not be used.

- \textbf{Marital Status}: will not be used.

- \textbf{Guardian}: will be used to indicate the relationship of the person named on this page to the student. It will default \textit{Parent}, but valid options are \textit{Parent}, \textit{Guardian} and \textit{Other}.

- \textbf{NID Country, NID Type & National ID}: will not be used.
- **Relationship Address tab**

  ![Relationship Address tab image]

  - **Related ID Name/Address/Email**: the name/address/email for the parent/guardian. Addresses/emails for each effective dated row of existing relationship records can be viewed in this section.
  - **Primary ID Address/Email**: will display the different address types/email types the student has on their record. However, ‘view’ only access will only see the Address Type of Home.
- **Relationship Detail tab**

The Details tab provides phone and about the parent or guardian.

- **Telephone:** we will use the *Day* field.
- **Relation Demographics:** is not used.
- **Relation Residency:** is not used.
- **Country of Citizenship:** is not used.
Enrollment Summary Data with Term Statistics

Access to student enrollment information is provided using menu choices available in PeopleSoft. Users will have different menu choices or different access levels within menus based on their business needs.

To access student enrollment data follow this navigation:
Basic Student Information>Enrollment Summary

There are several search options available here.
- Enter the student ID
- Or
- Enter the Campus ID (former system ID or KUID)
- Or
- Enter the National ID (Social Security number)
- Or
- Enter a Last Name and all or part of a First Name

★ HINT: When using Names for a search, if the search is the Last Name and the first letter of the First Name the resulting list will appear in alphabetical order. This is especially helpful if the Last Name is a common name. If using a portion of the Last Name, only the Last Name is in alphabetic order. It is not advisable to use only Last Name if that name is a common name.

If the Student ID is available, it is the most efficient way to search for a student record.
- Select the Term (optional)
- Press the Search Button

If the Term is specified, the Enrollment Summary will automatically open to the term indicated. The sample Search Results shown below was returned when a term was specified.

The 1st digit of the term code=century (i.e. 4=21st century), the next 2 digits of the term code=the last 2 digits of the year & the last digit of the term code=term code, 2=spring, 6=summer & 9=fall.

<table>
<thead>
<tr>
<th>ID</th>
<th>Academic Career</th>
<th>Academic Institution</th>
<th>Term</th>
<th>Short Description</th>
<th>Name</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Campus ID</th>
<th>National ID</th>
<th>Nations</th>
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</thead>
<tbody>
<tr>
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<td>2014Fall</td>
<td>Training</td>
<td>Joe Javaskrid Male</td>
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<tr>
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<td></td>
</tr>
</tbody>
</table>

After selecting the term from the Search Results list, the Enrollment Summary page opens.

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After selecting the term from the Search Results list, the Enrollment Summary page group opens. There are two page tabs **Enrollment Summary** and **Term Statistics** and a number of buttons and links displayed. The user can move between the two pages by simply clicking the tab for the page desired or by selecting the appropriate page link at the bottom of the screen.

The Enrollment Summary page contains the student’s class enrollment for the Term and Career shown. It includes the student’s class enrollment status which indicates whether they are Enrolled or in a Dropped or Withdrawn status. It also includes basic class information such as the subject, catalog number and title.

<table>
<thead>
<tr>
<th>Class Nbr</th>
<th>Subject</th>
<th>Catalog</th>
<th>Session</th>
<th>Section</th>
<th>Status</th>
<th>Status/Reason</th>
<th>Grading Basis</th>
<th>Units Taken</th>
</tr>
</thead>
<tbody>
<tr>
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<td>JOUR</td>
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<td>Regular</td>
<td>1002</td>
<td>Enrolled</td>
<td>Enrolled</td>
<td>G1</td>
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<td>Lecture</td>
<td>1002</td>
<td>Enrolled</td>
<td>Enrolled</td>
<td>G1</td>
<td>3.00</td>
</tr>
</tbody>
</table>

Just above the student’s enrollment list are navigation buttons to allow the user to see additional rows of class data.

Note the row count. On this record it indicates it is displaying 1-3 rows out of 4 possible rows.

**View All** will open the entire schedule into one long scrollable screen.

**First** returns the user to the first display page (rows 1-3) if the user has moved to another page.

**Last** takes the user to the final display page (row 4) of this record.

The **left** and **right arrow** buttons allow the user to move through multiple pages one page at a time.
The magnifying glass represents a lookup function. Using the magnifying glass beside the Class Nbr will display additional class details, such as the days, times and instructor for the class.
The **Term Statistics** page displays the units for the enrollment and if grading has occurred will also show the term Grade Points and Current gpa.

The Term Statistics page contains numeric data specific to the term shown at the top of the page. A student may have more than one Career record and more than one Term record, so there are two navigational bars that allow movement through the rows of data. The function of the navigation links is the same as described in the Enrollment Summary section of this document.

Some of the key items on this page in the Enrollments section are:
- **Graded Units For GPA** – After any grades are recorded, the total units for classes which count in the gpa will be displayed. Depending on the time of year, the units may reflect only part of the total.
- **Graded Units Not For GPA** – After any grades are recorded, the total units for classes which will not count in the gpa will be displayed.
- **Grade Points** – After any grades are recorded, the grade points earned for this term will be displayed.
- **GPA** – After any grades are recorded, the term GPA will be displayed. Depending on the time of year, the GPA may reflect only part of the grading.
- **In Progress Units** – this value indicates the number of units in which a student is currently enrolled.

The only item on this page in the Transfer Credit section being used is:
- **For Units Only** – Units that are transferred for credits only.

Many of the fields on this page are dynamic and may be incomplete when grading is incomplete, or may change if a new grade is recorded or a grade change occurs.
Student Career

The Student Career page displays the status of a student’s career and information about that career. **NOTE: This page does not show that the student was Term Activated or Enrolled in a specific term. It merely indicates their Career status at a given point in time.**

Following this navigation, select Student Career:

Basic Student Information>Student Career

If ID number is used for the search, the Student Career page should open immediately.

For each level of data, Academic Career, Student Career Nbr. and Academic Program Status, there will be a navigational bar at the top.

In the screen shot above, the student has two Careers on his record so the first navigational bar reflects a choice of 2 of 2 because it’s on the second Career row of two.
The second navigational bar indicates 1 of 3, which means the student has more than one Student Career Nbr. in this particular Career. (Each Career number points to a change in the student’s Academic Program or a new activation in the same Career and Program.

Selecting View All opens all occurrences of Student Career Nbrs. for the student for specific career. Refer to the screen shot below for an example of this.

### Student Career

<table>
<thead>
<tr>
<th>Academic Career:</th>
<th>Undergraduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Career Nbr:</td>
<td>2</td>
</tr>
<tr>
<td>Effective Date Action Date</td>
<td>Academic Program Status</td>
</tr>
<tr>
<td>08/15/1982</td>
<td>Discontinued</td>
</tr>
<tr>
<td>08/27/1990</td>
<td>Active in Program</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Career Nbr:</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date Action Date</td>
<td>Academic Program Status</td>
</tr>
<tr>
<td>08/23/2004</td>
<td>Completed Program</td>
</tr>
<tr>
<td>08/25/2004</td>
<td>Active in Program</td>
</tr>
<tr>
<td>02/21/2005</td>
<td>Active in Program</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Career Nbr:</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date Action Date</td>
<td>Academic Program Status</td>
</tr>
<tr>
<td>12/21/2005</td>
<td>Completed Program</td>
</tr>
<tr>
<td>02/21/2005</td>
<td>Active in Program</td>
</tr>
<tr>
<td>02/21/2005</td>
<td>Active in Program</td>
</tr>
</tbody>
</table>
In the screen shot below, the third navigational bar and continuing navigational bars indicates how many rows for each student career number listed under a specific career.

### Student Career

<table>
<thead>
<tr>
<th>Training, Joe J</th>
<th>Person ID: 1234567</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Career:</strong> Continuing Education</td>
<td></td>
</tr>
<tr>
<td><strong>Effective Date</strong></td>
<td><strong>Academic Program Status</strong></td>
</tr>
<tr>
<td>08/18/2004</td>
<td>Admitted</td>
</tr>
<tr>
<td>02/21/2006</td>
<td></td>
</tr>
</tbody>
</table>

| **Academic Career:** Undergraduate |  |
| **Student Career Nbr:** 2 |  |
| **Effective Date** | **Academic Program Status** | **Program Action** | **Institution** | **Acad Prog** | **Admit Term** |
| 05/16/1962 | Discontinued | Discontinuation | KU | TranU6 | 1960Fall |
| 05/15/1962 |  |  |  |  |  |
| 08/27/1960 | Active in Program | Activate | KU | TranU6 | 1960Fall |
| 08/27/1960 |  |  |  |  |  |
Student Degrees

Following this navigation, select Student Degrees:

Basic Student Information>Student Degrees

You can view the honor on the Degree Honors component on the Student Degrees page (along with the degrees, degree plans, degree sub-plans and degree dates).
Relations With Institution Detail Page

This page lists if a person has a current or former relationship with the University.

Following this navigation, select Relations with Institution:
Basic Student Information>Relations with Institution

Security will dictate who will have the capability to update this page.

### Relations with Institution

<table>
<thead>
<tr>
<th>Role</th>
<th>Currently Is A(n)</th>
<th>Manual Maintenance</th>
<th>Has Been A(n)</th>
<th>Manual Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni (A)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Applicant (A)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Aid (FA)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prospect (P)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student (S)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Financials (S)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter (R)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advisor (AUS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructor (IST)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friend (FND)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Save] [Return to Search] [Previous in List] [Next in List] [Notify]
Student Term Search

The Student Term Search provides a display of all terms in which a student was active and possibly eligible to enroll. NOTE: This page does not confirm that the student was actually enrolled in classes.

Using this navigation, select Student Term Search:
Basic Student Information>Student Term Search

- Entering the ID of the student is the most efficient search method.
- Alternately, the Campus ID (former system or KUID), the National ID (Social Security Number) or a combination of the Last Name and all or part of the First Name may be used.

After choosing a search method and entering the selection criteria, press the Search button.

This is the Search result:
There is a navigational bar on this page, which, depending on the result returned might be active.

**Student Term Search**

On the sample shown the choices on the bar are active since the data for this student is large enough to fill more than one page. The *First, Last* and arrow links allows the user to move from one page of data to another. The *View All* link opens a longer page with all rows visible. The row count on this student is 1-8 of 16. The student has 16 terms of activation, all of which does not fit on a single display page.

The information displayed on this page is the Academic Career for the term shown, the Academic Institution and the Eligible to Enroll flag. The Eligible to Enroll flag indicates that the student had term activation for the term shown and was eligible to enroll for that term. This page does not indicate the student actually enrolled.
Residency Data

Following this navigation, select Residency Data:

Basic Student Information>Residency Data

The Residency Data page gives you official residency data by career.

<table>
<thead>
<tr>
<th>Residency Official</th>
<th></th>
</tr>
</thead>
</table>

### Residency Data

<table>
<thead>
<tr>
<th>Academic Career:</th>
<th>Undergraduate</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Official Residency Data</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Next</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution:</td>
<td>KS</td>
<td>University of Kansas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Term:</td>
<td>2012</td>
<td>1900 Spring</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residency:</td>
<td>KS</td>
<td>In State</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>District:</td>
<td></td>
<td>Residency Date:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State:</td>
<td></td>
<td>USA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Last Updated: September 2012
Viewing Term Activation

The Term Activation page group provides access to student data that includes historical and current terms. A student must be “term activated” for a given term in order to enroll in Self-Service or be enrolled by the Registrar’s Office. This page does not include specific class enrollment information.

Follow this navigation, select Term Activation:
Basic Student Information > Term Activate a Student

There are several search options available here.
- Enter the student ID
  Or
- Enter the Campus ID (former system ID or KUID)
  Or
- Enter the National ID (Social Security number)
  Or
- Enter a Last Name and all or part of a First Name

If the Student ID is available, it is the most efficient way to search for a record.

If using Name as the search, the result may be a list of students.

<table>
<thead>
<tr>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>Training Jennie</td>
</tr>
<tr>
<td>Training Joe</td>
</tr>
</tbody>
</table>

To select from the list, simply click on any field on the line that is the correct student. If only one student matches the search criteria, the Term Activation page will open.
The following items can be viewed on the Term Activation page:

**Academic Career**  This component displays all of a student’s career term records by academic career.

**Academic Institution**  The system populates an academic institution, taking the value from the User Defaults component. Any valid academic institution can be specified here, but a record may be added only if the student is active in an academic program at that academic institution as of the start date of the specified term.

**Term**  The system displays all active terms for a student.

**Student Career Number**  By default, the system sets the student career number to zero, which is the first academic program from the Student Program/Plan page and identifies the student’s primary academic program. The system uses the student career number to perform various calculations, including the calculation of the student’s academic level and load. The student career number may be overridden, for instance, for students in dual programs. Once the student career number overridden in one term it rolls from term to term.

**Override All Academic Levels**  This check box would be selected to modify all academic level fields on this page. If this check box is cleared, the system uses the academic level defaults established on the Academic Level Table page.

**Override Projected Level**  This check box would be selected to modify the student’s projected academic level. Once checked, the Academic Level - Projected field becomes available to edit. If this check box is cleared, the system uses the academic level defaults established on the Academic Level Table page.

**Academic Level - Projected**  The system displays the student’s projected academic level at the start of the term, which will be the student’s actual academic level, provided that the student passes all in-progress units from previous terms. This field is used for checking enrollment restriction and tuition calculation, among other things. This field may be overridden value if either the Override Projected Level check box or the Override All Academic Levels check box is selected. For example, a student’s
projected level may be overridden when it is known that your academic institution will be receiving the student’s transfer credit, but the credit has not yet been entered into the student's official record.

**Academic Level - Term Start**  By default, the system displays the student’s academic level at the beginning of the term, based on cumulative completed units from previous terms or transfer units. This level may be overridden if the Override All Academic Levels check box is selected.

**Academic Level - Term End**  By default, the system displays the student’s academic level at the end of the term, based on cumulative completed units, including work completed in this term and transfer units. This level may be overridden if the Override All Academic Levels check box is selected.

**Level Determination**  By default, the system displays the level determination value from the Level/Load Rules Table component, based upon the academic career for the student on this page.

**Academic Year**  By default, the system displays the academic year, based upon the term.

**Load Determination**  By default, the system displays the load determination value from the Level/Load Rules Table component, based upon the academic career for the student on this page.

**Form of Study**  The system, by default, sets the student’s form of study to *Enrollment*, but this default value may be overridden. The value of *Enrollment* tells the system that this form of study is unit-based. These translate values may be modified, with the exception of the *Enrollment* value.

**Academic Load**  The system displays the student’s academic load, which is calculated in units enrolled.

**Billing Career**  The system, by default, sets the student’s billing career to the academic career in the student’s career term record. The tuition calculation process uses the student’s billing career to calculate the student’s tuition.

If the student is active in more than one academic career in the same term, tuition calculation and billing might be consolidated under a single academic career. If so, the billing career for all of the student’s career term records is set to the same academic career. For example, a student might be enrolled in a term as both a graduate student and an undergraduate student. To consolidate tuition calculation to just the undergraduate career, the undergraduate career would be set as the billing career for both the student’s undergraduate term record and graduate term record.

**Eligible to Enroll**  The system, by default, selects this check box, which informs the enrollment engine that the student is eligible to enroll in classes for the specified term. The check box is cleared to prevent the student from enrolling in classes for the specified term.

For example, this check box might be cleared when posting transfer credit to a student’s career term record in which the student will not be eligible to enroll until a later date. The transfer credit posting process requires that a student is active in the term to which you are posting transfer credit.
Searching for Classes

Class Search allows viewing of the classes scheduled for a particular term. There are several locations from which a Class Search may originate, including various enrollment functions.

Following this navigation, select Class Search:
Catalog/Schedule of Classes>Class Search

- Select University of Kansas as the Institution (This may pre-populate through the user default setup.)
- Using the drop down, select the Term.
- Enter or select the Course Subject or enter the Class Nbr.
Upon selecting the Additional Search Criteria drop down button, the *Class Search Criteria* screen appears as shown below:

To speed up a search, complete as many of the selection criteria fields as possible. **The user is required to enter at least 2 items.** Because the Schedule of Classes is usually quite large, searches with limited criteria can be very slow.

The first two fields listed above are good choices for initial criteria.
- Course Subject may be selected using the green select subject button. This is a required field.
- Enter the Course Number (if known)

**NOTE:** The Course Attribute and Course Attribute Value fields are helpful fields for departments and advisors during advising.
Completing some of the following fields will help accelerate the search:

- ‘Is Exactly’ match if the search is to find the exact Course Number.
- Select the Course Career.
- Show Open Classes Only – this checkbox eliminates classes that have reached capacity.
- Course Component can be used as criteria if the class is a single component class or if you only want to search for one specific component, for example, Lecture.
- Enter Campus if known.
- Enter Location if known, such as Lawrence Campus or Medical Center Campus.
- Press the Search button that appears at the bottom of the page.

This is a sample of the Search Results:

From within either search, class details may be obtained by pressing the Class Number link or the Section link. That will open another page with additional information about the class including the Description from the Course Catalog.
Class Search Detail:

Class Details:

ACCT 320 - 1000 Financial Accounting II
University of Kansas | 2010 Spring | Lecture

<table>
<thead>
<tr>
<th>Class Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
</tr>
<tr>
<td>Class Number</td>
</tr>
<tr>
<td>Session</td>
</tr>
<tr>
<td>Units</td>
</tr>
<tr>
<td>In Person</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Meeting Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days &amp; Times</td>
</tr>
<tr>
<td>Location</td>
</tr>
<tr>
<td>Instructor</td>
</tr>
<tr>
<td>Dates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enrollment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Total</td>
</tr>
<tr>
<td>Wait List Total</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Class Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Capacity</td>
</tr>
<tr>
<td>Wait List Capacity</td>
</tr>
</tbody>
</table>

Notes:

School of Business
Accounting

Course scheduling information: (888) 854-7500

Undergraduate

Courses coded enrollment restricted are open to School of Business students only. Please refer to the website (www.business.ku.edu) or the staff in 208 Summerville for clarification.

The School of Business strictly enforces prerequisites for all business courses. Students who enroll in a course without completing the appropriate prerequisites may be administratively dropped without notice in the first week of the semester. Petitions for readmission to the course(s) will not be accepted.

Admission to the School of Business is competitive. Application deadlines are September 15 for spring admission and February 15 for summer and fall admission. Contact the School of Business Student Services Center, 208 Summerville Hall, for specific details.

Graduate

Enrollment in all graduate-level courses (BUS 700 and above) requires admission to the Business Division of the Graduate School (155 Summerville) or a special permission number issued by the Director of Rester’s Programs or the Director’s Designee.

All students enrolled in School of Business courses will be charged Business Differential tuition in addition to University tuition and fees. For additional information please go to www.ku.edu.

Description:

A study of generally accepted accounting principles (GAAP) underlying the preparation and interpretation of general purpose financial statements with emphasis on the principles of revenue recognition, matching revenues and related costs, and the determination of proper balance sheet valuations of assets and liabilities. The asset side of the balance sheet is the primary emphasis through the entire financial statements are used in examples throughout the course. Prerequisites: ACCT 201, Prerequisite or Corequisite: ACCT 303.

The View Search Results button either at the top or at the bottom of the page will return the user to the results page and from there, you can either select another section to view or return to the search window by using the Start a New Search button.
Catalog Search

The Catalog Search permits the user to enter a minimum of search criteria to view descriptive details about a course. The Catalog Search is not term specified and thus does not confirm that a particular course is offered in any specific term.

Following this navigation, select Course Catalog Search: Catalog/Schedule of Classes>Course Catalog Search

Course Catalog Search

Search Criteria

Enter institution and subject. Catalog number is optional.

- **Institution**: University of Kansas
- **Subject Area**: ACCT Accounting
- **Catalog No.**: 320 Exact Match

* Required Field

- Select the Institution from the drop down arrow. (This may pre-populate from the user default setup.)
- Either enter the 2-4 character Subject or select the Subject from the magnifying glass.
- Enter the Catalog number if known.
- Press the Search button.
A page will open with course descriptions and additional catalog details. The size of the resulting list is dependent on your Search criteria. The list will show all catalog numbers for the Subject if a catalog number is not specified.

Course Catalog Search

Catalog Search Results

University of Kansas | Accounting

ACCT 320 - Financial Accounting II

Course Detail

Units: 5 units
Grading Basis: AE(H')FI
Course Component: Lecture Required

Enrollment Information

Enrollment Requirement: Student must have completed ACCT 201 (BUS 241) to enroll in this course.

Course Attribute: Prerequisite Indicated

Description

A study of generally accepted accounting principles (GAAP) underlying the preparation and interpretation of general-purpose financial statements, with emphasis on the principles of revenue recognition, matching revenues and related costs, and the determination of proper balance sheet valuations of assets and liabilities. The asset side of the balance sheet is the primary emphasis through the entire financial statements are used in examples throughout the course. Prerequisite: ACCT 201.

To exit the Search Results, click on the Return to Search button at the bottom of the Results page.
Course Catalog Summary

The Course Catalog Summary provides detailed information from the Course Catalog, such as the unit range, details about the course offering and components.

Using the navigation shown, select Course Catalog Summary:
Catalog/Schedule of Classes> KU Crse Catalog Summary

Complete as many of the search fields as possible to make the search process efficient.

Warning: This search will allow you to press the Search button without entering any selection criteria. The Catalog at KU is quite large and this practice is not advisable, indeed doing so could seriously impact the performance of the system.

These fields should always be completed:
- Select the Institution.
- Select the Subject.

Additionally, these fields are recommended:
- Enter the Catalog Nbr.

Optional Fields:
- Enter the Campus.
- Enter the Course ID if known.
- Enter all or part of the description (title) of the course. If using Description, it is advisable to leave the "Case Sensitive" box unmarked. Marking it limits the search to an exact match of the case you use in the Description field. (For example if Earth was typed in and the box marked, then EARTH would not be found.)

After selection criteria have been entered, Press Search.
If the specific catalog number was not used in the search, the result will be a list of courses within the subject area. Below is a sample of the Results list:

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>Subject Area</th>
<th>Catalog No.</th>
<th>Category</th>
<th>Course ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>206</td>
<td>KULC</td>
<td>345122</td>
<td>Undesignated Transfer Credit</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>203</td>
<td>KULC</td>
<td>343193</td>
<td>Financial Accounting I</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>201</td>
<td>KULC</td>
<td>343533</td>
<td>Managerial Accounting I</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>205</td>
<td>KULC</td>
<td>345970</td>
<td>Survey of Accounting</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>306</td>
<td>KULC</td>
<td>345541</td>
<td>Special Topics in Accounting</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>303</td>
<td>KULC</td>
<td>345783</td>
<td>Intro to Accounting Profession</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>311</td>
<td>KULC</td>
<td>344147</td>
<td>Information Systems for Accountants</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>326</td>
<td>KULC</td>
<td>344354</td>
<td>Financial Accounting II</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>321</td>
<td>KULC</td>
<td>344355</td>
<td>Intermediate Accounting Finance</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>325</td>
<td>KULC</td>
<td>342692</td>
<td>Managerial Accounting II</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>336</td>
<td>KULC</td>
<td>343539</td>
<td>Introduction to Taxation</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>335</td>
<td>KULC</td>
<td>344208</td>
<td>Introduction to Income Tax</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>336</td>
<td>KULC</td>
<td>344206</td>
<td>Special Topics in Accounting</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>410</td>
<td>KULC</td>
<td>343606</td>
<td>Financial Accounting III</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>506</td>
<td>KULC</td>
<td>344048</td>
<td>Individual Research Accounting</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>543</td>
<td>KULC</td>
<td>345101</td>
<td>Introduction to Auditing</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>645</td>
<td>KULC</td>
<td>345998</td>
<td>Advanced Taxation</td>
</tr>
<tr>
<td>UKANS</td>
<td>ACCT</td>
<td>599</td>
<td>KULC</td>
<td>345551</td>
<td>Internship in Accounting</td>
</tr>
</tbody>
</table>

- From the list, select the course you wish to view by clicking on any field on the line for that course.
That will open the Course Catalog Summary page:

**Course Catalog Summary**

Course ID: 344364  Financial Acctg II

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Status</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2006</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Equivalent Course Group:

<table>
<thead>
<tr>
<th>Grading Basis</th>
<th>Min Units</th>
<th>Max Units</th>
<th>Progss Unit</th>
<th>Crs Cnctct</th>
<th>Allwd Unt</th>
<th>Allow Comp</th>
</tr>
</thead>
<tbody>
<tr>
<td>011</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>1</td>
</tr>
</tbody>
</table>

Equivalent Course Group

<table>
<thead>
<tr>
<th>Course ID</th>
<th>Effective Date</th>
</tr>
</thead>
</table>

Course Offering

<table>
<thead>
<tr>
<th>Institution</th>
<th>Acad Group</th>
<th>Subject</th>
<th>Catalog</th>
<th>Acad Org</th>
<th>Approved</th>
<th>Career</th>
<th>Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>UKANS</td>
<td>BUS</td>
<td>ACCT</td>
<td>320</td>
<td>ACCT</td>
<td>Approved</td>
<td>Undergrd</td>
<td>KULC</td>
</tr>
</tbody>
</table>

Course Component

<table>
<thead>
<tr>
<th>Component</th>
<th>Instructor Contact Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture</td>
<td>Optional 4.000</td>
</tr>
</tbody>
</table>
Class Sections

The Class Sections page group provides a quick snapshot of Class information for a particular subject, catalog number and section(s) in a given term.

Follow this navigation, select Update Sections of a Class:
Catalog/Schedule of Classes>Update Sections of a Class

A search page will open. This search is considered the Advanced Search method.

The more criteria that is entered, the better and faster the search will process. The following items will produce an efficient search.

- Select the Academic Institution.
- Select the Term.
- Select the Subject Area.

Warning: It is not advisable to do a search with less than three criteria. The Class table is quite large and a search without at least three criteria may result in an error.

- Select the Catalog number if known.
- Alternately a combination of Institution, Term and Course ID or Description may be used. Description may be used in connection with Institution and Term and may contain all or a portion of the title of the class. If using Description, the Case Sensitive box does have an impact on the results. For example, if Case Sensitive is checked and the entry in Description is "intro", then the title that included INTRO will not be found. However, if the Case Sensitive box is left unmarked, using “intro” will locate the title that includes the word INTRO.

Campus and Course Offering Number may be used to further narrow a search that already has some of the criteria above.

- The Clear button will clear all criteria out of the fields.

Warning: The Basic Search should not be used to access the Class Section pages. There is not enough criteria used in the Basic Search to have a successful result.

- After entering the selection criteria, Press the Search button.
The Class Section page group will open.

There are two pages (tabs) in this page group.

The basic class information appears at the top of the Class Status page. The Course ID, Institution, Term, Subject Area, Catalog Nbr. and the title information are displayed, along with the career.

There is a navigational bar (labeled Class Sections) on which links may be active if the resulting rows of data are more than one screen can display. In the sample above there are only enough rows to fill one screen so the links are disabled. The View All link will open a long screen with all the rows that are available. The First, Last and Left and Right arrow links allow movement from one page of data to another. In the sample shown, the row count shows 1-3 of 3, indicating that all rows will appear on the same page.
The fields shown on the Class Status page are:

**Session** - The type of session (Regular, Summer) in which the class will be offered.
**Sect** – The Class Section number identifies a specific meeting time and day for the class in a specific term.
**Class Nbr** – The Class Nbr that is unique to the Class Section and is used when enrolling. The Class Nbr is similar to the legacy system Line Number.
**Component** – The Component type for the Section, for example Lecture or Discussion.
**Enrollment Status** – The current status of the class, which would be Open or Closed (indicating the class is full or cancelled).
**Class Type** – Indicates whether the class is an Enrollment section (usually the graded component of the class) or Non-Enrollment Section (often the Lab or Discussion component).
**Class Stat** – This indicates whether the class is Active for the term. The possible values are: A=Active, X= Cancelled, S=Stop Enrollment, T=Tentative.
**Assoc** – The Class Association number, also a number that helps identify the section and indicates any ties between sections.
**Auto Enrl 1** – Indicates any related class that will automatically be added to the student’s schedule when enrolling in the primary section. (For example a student may select the Lecture section and a Lab section is automatically placed on the student schedule.)
**Auto Enrl 2** - Indicates a possible related class that will automatically be added to the student’s schedule when enrolling in the primary section.
**Resection** – Indicates the existence of a resection to section rule – if the primary section is closed the student would be placed in an alternate section automatically.
**Add & Drop Consent** - Indicates the class requires permission to enroll or drop.
  N= No consent required
  I= Instructor consent
  D= Department Consent
**Schd Print** - Indicates whether or not this particular class and section will appear in the on-line Schedule of Classes as well in the printed Schedule of Classes.
To view the Class Enrollment Limits page, simply click on the Class Enrollment Limits page (tab).

The Class Enrollments Tab contains the enrollment data for the class as of the time the page is opened. The Session, Section, Class Nbr and Component are repeated on this page for easy identification of the specific section being viewed.

The fields shown on the Class Enrollment Limits page are:

**Enrl Cap** – The enrollment capacity limit defined for each section shown.

**Enrl Tot** – The actual current enrollment in the class at the time of the search. This is real-time data.

**Wait Cap** – The maximum number of waitlist spaces that will be allowed.

**Wait Tot** – The actual current number of students on the waitlist as of the time of the search.

**Min Enrl** – The minimum enrollment that will be allowed for the class to be taught.

**Room Capacity** – The room capacity limit defined by the Fire Marshall for each section shown.

**Facility ID** – The actual room the class will be instructed in. If a room is not yet assigned, 'unassigned' will be listed. If the class meets in multiple rooms, then 'multiple' will be listed.
Grade Roster

The Grade Roster is the list of students enrolled in a class for a specified term and includes any grading that has occurred.

Following this navigation, select Grade Roster:
Catalog/Schedule of Classes>Grade Roster

The more criteria entered, the more efficient the search will be and the more precise the result. The following items are recommended for use in the search.

- Enter or select the Academic Institution. (This may pre-populate from default setup.)
- Enter or select the Term. Then
- Enter or select the Subject Area.
- Enter the Catalog Nbr. if known. Or
- Enter the Class Nbr. if known.

(Be sure to use Term in connection with Class Nbr. Class Numbers are recycled and the same number may exist in more than one term.)

In combination with the Institution and Term, the following items may be helpful in a search:

- The Description can be used for a search. Type all or part of the title of the course. If using Description, it is advisable to leave the “Case Sensitive” box unmarked. Marking it limits the search to an exact match of the case you use in the Description field. (For example if Earth was typed in and the Case Sensitive box marked, then EARTH would not be found.)
- Enter both the Course ID and Course Offering Nbr. if known.
- Enter the Class Section if desired.
- Session and Campus may help narrow down the selection.
- Press the Search button.

Warning: The Basic Search link opens a more limited search. Because only one item of selection criteria may be specified, it is not advisable to use it on this page group. The search may be extremely slow and could result in a list that may include classes from multiple terms.
If there is more than one section of the class for the term specified, the results will be a list of the different sections.

- Select the desired class section by clicking on any field in the row for that section.

The Grade Roster page will open.

The **Grade Roster Type** page (tab) is the first page. The top left side of the page is a display of basic class information: Course ID, the title, subject and catalog number, Offer Nbr., Class Section number and the Class Nbr. At the top right is the Institution, the term and the session. (Use Blind Grading allows the viewing of a Roster with no student names. Instead a Blind Grading code is present. (This feature is not currently used.) Meeting Information displays: Days & Times, Room, Instructor and Meeting Dates.

The default for the Grade Roster Type is Final Grade.

The Approval Status may show:
Not Reviewed – Grading may be occurring or has not begun so Roster is still available for use.
Ready to Review – Grades are entered and the Roster is being reviewed.
Approved – Grades are entered and are ready to post to the student’s records.
No further grading may be done.

The Final Roster Grading Status will display Grade Input Allowed until the Approval Status is changed to Approved at which time it becomes Ready to Post.
The **Grade Roster** page (tab) for the class shown below:

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Roster Grade</th>
<th>Official Grade</th>
<th>Units Taken</th>
<th>Career</th>
<th>Grading Basis</th>
<th>Final Roster Status</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>A</td>
<td>A</td>
<td>4.00</td>
<td>Undergrad</td>
<td>A(100)F1</td>
<td>Posted Detail Note</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>B</td>
<td>B</td>
<td>4.00</td>
<td>Undergrad</td>
<td>A(100)F1</td>
<td>Posted Detail Note</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>B</td>
<td>B</td>
<td>4.00</td>
<td>Undergrad</td>
<td>C0C N C</td>
<td>Posted Detail Note</td>
<td></td>
</tr>
</tbody>
</table>

The Grade Roster page (tab) shows the ID and Name of the students enrolled. The Official Grade, if one exists, is shown. The Units Taken is displayed. The Career is displayed. The Grading Basis used for this student for this class is displayed. The Final Roster Status shows whether the individual grade is Pending or Posted. The Detail link is non-functional in this view. The Notes link is functional in this view. If an instructor assigns a grade of ‘I’ (Incomplete), click on the Note link and then click on the Incomplete Detail link. They will use the Incomplete Detail link to make a comment/note for informational purposes only.
Class Roster

The Class Roster is the list of students enrolled in a class for a specified term. Past, current or future terms may be viewed by using the desired term in the search page. The Roster also allows the user to view students in different enrollment statuses, for example, those students who have Dropped the class.

Following this navigation, select Class Roster:
Catalog/Schedule of Classes>Class Roster

The more criteria entered, the more efficient the search will be and the more precise the result. The following items are recommended for use in the search.

- Enter or select the Academic Institution. (This may pre-populate from the user default setup.)
- Enter or select the Term.
- Enter or select the Subject Area.
- Enter the Catalog Nbr. if known.

Alternately, the following items may also be helpful:

- Enter the Class Nbr. if known.
- Enter the Class Section if known.
- Enter the Session, either Regular or Summer.
- Enter both the Course ID and Course Offering Nbr if known.
- Press the Search button.
If there is more than one section of the class for the term specified, the results will be a list of the sections.

Class Roster

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

Search Results

If there is more than one section of the class for the term specified, the results will be a list of the sections.

Class Roster

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

Search Results
- Select the desired class section by clicking on any field in the row for that section. The Class Roster page will open.

### Class Roster

1009 Fall | Regular Academic Session | University of Kansas | Undergraduate

**MATH 101 - 1009 (15961)**

*Algebra (Lecture)*

<table>
<thead>
<tr>
<th>Section</th>
<th>Days</th>
<th>Start Time</th>
<th>End Time</th>
<th>Instructor</th>
<th>Class Size</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>G11</td>
<td>WD</td>
<td>08:00</td>
<td>09:15</td>
<td>Ingrid Peterson</td>
<td>33</td>
<td>Enrolled</td>
</tr>
</tbody>
</table>

**Enrollment Status:** 24

**Enrollment Capacity:** 24

**Enrolled:** 24

**Dropped:** 4

---

Select the desired class section by clicking on any field in the row for that section. The Class Roster page will open.

**Add/Drop Date:** 07/07/2009

**Preferred Name:**

**Current Class:**

**Primary Program:**

**Level:** Freshman

**Status:** Enrolled

**Units:** 3.00

**Comment:**

---

**Select All**

**Clear All**

**Notify selected students**
The top left side of the page is a display of basic class information: subject, catalog number, class section, description, component, class number, term session, Institution and career as well as the meeting information. The subject/catalog number/class section/class number is a link to the Class Detail.

The default for the Enrollment Status drop down is Enrolled. The drop-down selection can include All, Dropped, Enrolled and Waiting. If the drop-down is changed to Dropped, the screen is refreshed with a new list. The Enrollment Capacity, Enrolled and Dropped counts are listed depending on what is selected in the Enrollment Status.

Below is some of the information you will find on the class roster:

Add/Drop Date—If you have selected the Enrollment Status of ALL—If in the Status column it lists Enrolled, then the date in this column will be the Add Date and there will be hours listed in the Units column. If in the Status column it lists Dropped, then in this column will be the Drop Date and there will not be hours listed in the Units column. If in the Status column it lists Enrolled, but also in the Status Note column it lists Withdrawn, then the date in this column will be the withdrawn date and the hours lists in the Units column will be 0.00
Student Preferred Name—Is an email link to facilitate individual student contact. Level—The level of the student at term start. Select—If the checkbox is checked to the left of a student and the “notify selected students” button at the bottom of the page is pushed, a new send notification screen will pop up. Popups must be allowed for sa.ku.edu Fill in the subject and message of the email, press the send notification button and the email will be sent to the selected students. Make sure all information is correct before hitting the send notification button because the email cannot be retrieved.

<table>
<thead>
<tr>
<th>Class Roster</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Notification</td>
</tr>
<tr>
<td>Type e-mail addresses in the To, CC or BCC fields using a comma as a separator.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Notification from Course Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>From:</td>
</tr>
<tr>
<td>To:</td>
</tr>
<tr>
<td>CC:</td>
</tr>
<tr>
<td>BCC:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subject:</th>
<th>Email from Professor Peterson about Monday's Math 151 Class at 8 a.m.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Text:</td>
<td>Cancelling today's class. Professor Peterson</td>
</tr>
</tbody>
</table>

NOTE: If there is not a checkbox in the Select column, this means the student does not have an email address listed.
Download Class Roster to Excel

To download a roster or any other table to Excel, click the box circled below.

The following screen should pop up if you do not have it blocked. If you do not have it blocked and still nothing happens you may have to change some options in your Internet browser security to allow the download.
To change the security settings on your Browser to allow the file download--

**For Internet Explorer**
- Go to the Tools menu
  - Select Internet Options
  - Then the tab that says Security
  - The button towards the bottom that says Custom Level
Scroll down the settings list for a choice called Downloads. One of the options is Automatic prompting for file downloads. Click the circle below it to say “Enable” then click OK at the bottom.

When it asks if you are sure, click Yes then click OK again below Custom Level. Then Apply the changes and a final OK.
When you try to download a grid using the icon, if nothing happens (the screen flashes but nothing shows up),

Go to Tools → Internet Options

Click on Security Tab → Trusted Sites → Sites
Page to enter trusted site. Add the below listed site for your database, then click on the Add button:

https://sa.ku.edu

For Mozilla Firefox version 3—
Go to the Tools menu and choose Options
Click on the Applications tab
Scroll down to Microsoft Excel Worksheet
Change to: Use Microsoft Office Excel (default)

For Mozilla Firefox version 2—
Go to the Tools menu and choose Options
Click on the Main tab
Under Downloads
Be sure that the ‘Show the Downloads window when downloading a file’ checkbox is checked
Class Permission Numbers

PeopleSoft provides the ability to grant permission to a student to enroll in a class that has been defined as requiring Department or Instructor Consent. This requirement may be placed on the class at the Catalog level or may be applied to one specific section in a term by setting it up in the Schedule of Classes. Or if they want to take a class outside their ‘active’ career or if the class has been given additional spaces.

There are two types of Permissions that may be granted, General or Student Specific.

Following this navigation, select Class Permission Numbers:
Catalog/Schedule of Classes>Class Permission Numbers

The General Permission type allows a department to assign a quantity of Permission Numbers to a class without determining in advance which specific students will be granted permission. For this method, a specific quantity of Permission Numbers is generated. Additional permission numbers may be granted later. A Permission Number is given to the student along with the Permission Number expiration date and the student may enroll in the class via Self-Service as long as they enter the Permission Number and prior to the Permission Number expiration date. The Permission Numbers are randomly system generated numbers. If enrollment is attempted without the Permission Number, the transaction will result in an error with a message that “consent is required”.

Complete as many of the fields as possible for the most efficient search.
- Enter or select Academic Institution. (This may be pre-populated from user defaults.)
- Enter or select Term.
- Enter or Select the Subject Area.
- Enter or Select the Catalog Nbr. if known.
- Academic Career and Campus are optional. These items may help narrow the search.
- Description may be used in connection with Institution and Term and may contain all or a portion of the title of the class. If using Description, the Case Sensitive box does have an impact on the result. For example, if Case Sensitive is checked and the entry in Description is “intro”, then the title which included INTROD will not be found. However, if the Case Sensitive box is left unmarked, using “intro” will locate the title that includes the word INTROD.
- Using Course ID and Course Offering Nbr (if known) in connection with Institution and Term is an alternative to Subject Area and Catalog Nbr.
- Once Search criteria have been completed, press the Search button.

The Basic Search link on this page should not be used. The Basic Search only requires 1 item of selection criteria and because this particular search requires Institution as key criteria, selecting any other field will result in an error. Searching on Institution alone is not advisable as the result could be extremely large.
The Class Permission Numbers page is shown below. The first example is for **General Permission Number**. Once the permission number has been used, the name of the student and the use date will appear.

The Course ID shown is a random ID created when the course is created in the catalog. It is unique to the catalog, not specific to a term.

The Class No. is a unique number for a specific class and section for the term shown.

The Expiration Date shown on this page is the Default Expiration date. When using General Permissions, it is possible to change the Expiration Date, but the change will only go in effect for new permission numbers generated after the change has been made.

The Enrollment Total shown on this page is the total enrollment for the specified section (real time data).

The Meeting Pattern--Facility ID, Start/End and Room Capacity are also shown on this page along with the Instructor's name for the specified section.

There is a navigational bar on this screen that allows the user to view more than one section of the class if multiple sections exist.
The View All link will open the page up to display any and all sections that exist. In this example, the row count 2 of 3 indicates there are three sections available for viewing. The First, Last and Left and Right arrow links allow movement through the pages (sections).

Defaults--
Expiration Date: This is the date the permission number(s) expires. The value in this field in the Defaults area will be added to each permission number generated.
Permission Valid For: Closed Class and Consent Required (Instructor and Department Consent) checkboxes under the Defaults area will default to be overridden as well as the Permission Time Period (which KU does not use) checkbox. These are the recommended settings and may be changed using the checkboxes under the Defaults, but should be used with extreme caution. The Requisites Not Met and/or the Career Restriction checkboxes may also be used under Defaults but should be used with extreme caution.

Assign More Permissions: Where the number of permission numbers needed is entered. When assigning numbers one cannot go beyond the room capacity by looking at the Enrollment Total and any permission numbers with a Status of ‘Not Used’ that have not expired. So, in the screen shot above since the Enrollment Total is blank and the Room Capacity is 48, but the one permission number that has already been generated has a Status of ‘Not Used’ and has not expired, on would need to account for this permission number in the Enrollment Total. So, for this class, there will now be 47 spots available.

On the General Info tab--
Seq #: A system generated number that is assigned based upon the order in which the permission numbers are created.
Number: The randomly system generated number the student enters to enroll in the class. These can be from 3-6 digits.
ID: Identification number of the student. This displays once the permission number has been used as well as their name just to the right of the ID.
Issued/Issued By/Issued Date: If the Issued checkbox is checked, these fields will populate when you save the page. These would then display the user ID and the date when the Issued checkbox is checked. This should be checked any time a permission number is given out.
Set All Permissions to Issued: If you select this checkbox, all the unselected Issued checkboxes in the Class Permission Data area are selected. The Issued By and Issued Date fields will populate when this page is saved.
Status: Displays as Not Used until the permission number is entered by the student when enrolling. The status then changes to Used. This can also be dropped or withdrew.
**Permission Use Date:** Use Date. Displays the date the permission number was used, dropped or withdrew.

**Expiration Date:** Required field. Populates by default from the Expiration Date in the Defaults area and can either be left with what date defaults or changed. Or can be changed after assigning the permission numbers.

**On the Permission tab**—
These will fill in from the defaults area, but may be changed per permission number. These checkboxes decide what the permission number overrides for the student. Therefore will only be changed with an understanding of what will be allowed.

**On the Comments tab**—
May be used to track the student’s ID number and name of the student was given the permission number to or reasons for giving the permission number.

**Permission to Drop tab**—currently not be used.
**Student Specific Permission**: First the class must be defined as Student Specific Permission on the Schedule of Classes setup. With Student Specific Permission, the Class Permission Number page looks slightly different from the General Permission Number.

![Image of class permission setup](image)

**Student Specific Permission** requires the entry of a student ID on the Class Permission Number page. No permission number is assigned. Because the permission has been assigned directly to the student, the student may simply enroll in the class and does not need a special number to do so, but does still need to be given the Expiration date.

Once the student has enrolled, the status of the Permission Number will change to Used and a Permission Use Date will be populated.

The Expiration Date shown on this page is the Expiration date. When using Student Specific Permissions, it is possible to change the Expiration Date. Changing the Expiration Date will change the Expiration Date for new rows that are created or the Expiration Date may be changed on an individual row (individual student) and may be a different date than the Expiration Date.
Instructor Schedule

The Instructor Schedule page group displays details about any classes that are assigned to an instructor in the term specified.

Following this navigation select Instructor Schedule:

Catalog/Schedule of Classes>Instructor Schedule

- Enter or use the lookup button to select the Term.
- Enter the ID for the instructor or use the lookup button to locate the instructor ID.
- Press the Search Button.

⚠️ Warning: The Basic Search does not work for this page group.

The Class Instructor Page group will open.

### Instructor Schedule

<table>
<thead>
<tr>
<th>Course</th>
<th>Subject</th>
<th>Catalog</th>
<th>Section</th>
<th>Component</th>
<th>Class Title</th>
<th>Start Time</th>
<th>End Time</th>
<th>Mode</th>
<th>Room</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIST</td>
<td>320</td>
<td>1000</td>
<td>LEC</td>
<td>Readings in Hist</td>
<td>10:30 AM - 11:30 AM MWF</td>
<td>Rot-11</td>
<td>2061</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HIST</td>
<td>492</td>
<td>1032</td>
<td>IND</td>
<td>Readings in Hist</td>
<td>10:30 AM - 11:30 AM MWF</td>
<td>Rot-11</td>
<td>303A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HIST</td>
<td>204</td>
<td>1005</td>
<td>LEC</td>
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<td>2:00 PM - 3:00 PM MWF</td>
<td>Rot-11</td>
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<td>1070</td>
<td>DIS</td>
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<td>11:00 AM - 12:00 PM Th</td>
<td>Rot-11</td>
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<td></td>
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<td>2061</td>
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</table>

The first page (tab) is the Instructor Schedule, which displays a list of classes for the specific instructor for the term specified. This panel displays the basic class information, the Class Number, Subject, Catalog number and Section. It also displays the Component type, Class Title, meeting pattern and location.

To maneuver between pages, simply click on the tab for the desired page.

The second page (tab) is the Instructor Schedule 2.

### Instructor Schedule

<table>
<thead>
<tr>
<th>Course</th>
<th>Subject</th>
<th>Catalog</th>
<th>Section</th>
<th>Component</th>
<th>Class Title</th>
<th>Start Date</th>
<th>End Date</th>
<th>Session</th>
<th>Institution</th>
<th>Priorities</th>
<th>Ad-Hoc Course</th>
<th>Contact Minutes</th>
</tr>
</thead>
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<tr>
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<td>1009</td>
<td>LEC</td>
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<td>08/21/2003 - 12/15/2003</td>
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<td>CLAS</td>
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<td>1032</td>
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<td>CLAS</td>
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</tbody>
</table>

This page also displays the class identification columns and shows the Start and End dates of the class, the Session, the Institution and the Academic Group to which the class belongs. The Contact Minutes are not currently used.