

Faculty & Advisors Tips & Tricks

OBJECTIVE:

This document provides some quick steps on functionality that is commonly needed or used by Faculty and Advisors.

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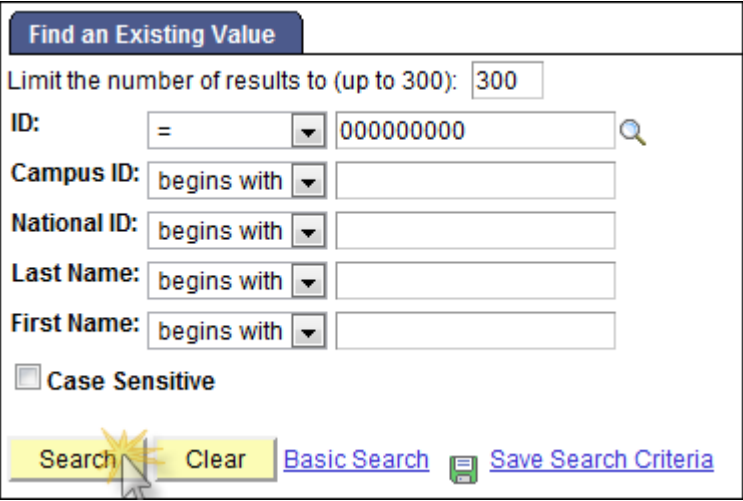
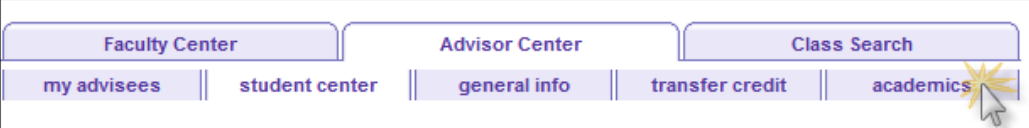
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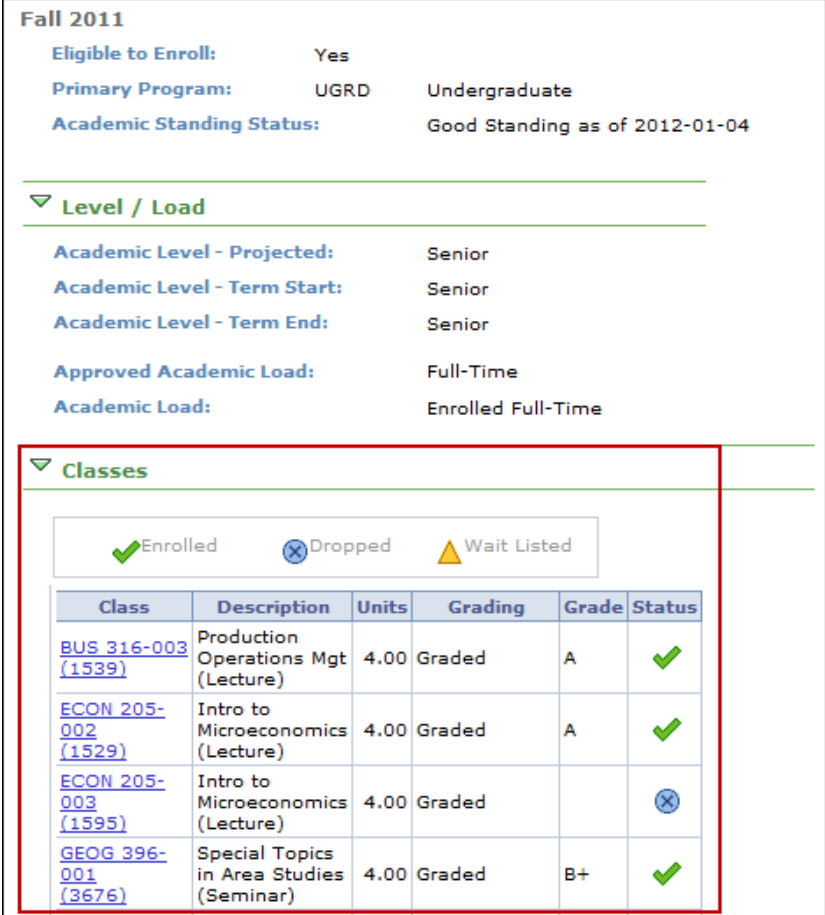
NEED ADDITIONAL INFORMATION?

For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/it/cms/contact.html> to locate the **STUDENT RECORDS FUNCTIONAL LEAD.**

Lesson 1: Accessing a Student's Previous Schedule

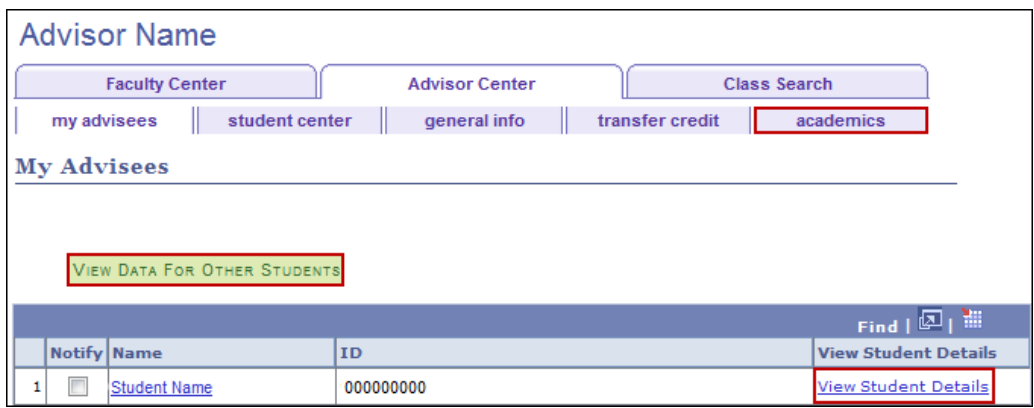
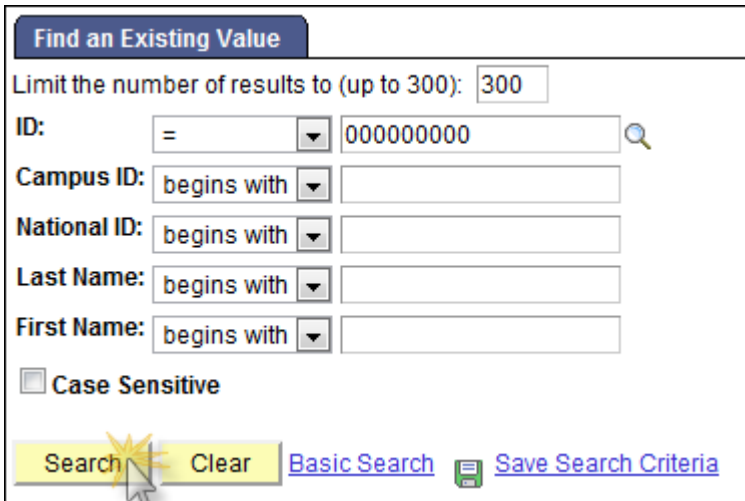
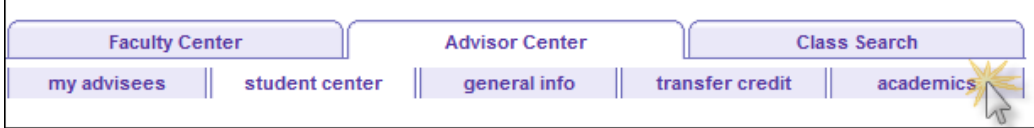
Navigation: Faculty or Advisor Center

Step	Action	Screenshot
1	From the Advisor Center select either Academics Tab, View Data for Other Students button or View Student Details.	
2	<p>IF you chose academics tab OR IF you chose View Data for other Students:</p> <p>Enter the search information for the student and click search. Select the student if necessary.</p> <p>THEN click Academics Tab</p>	
3	<p>IF you chose View Student Details:</p> <p>Click the Academics Tab.</p>	

Step	Action	Screenshot																														
4	<p>Scroll down on the Academics Tab page until you see</p> <p>Term Summary</p> <p>Select the term of interest.</p>																															
5	<p>The student's class schedule will display on the right.</p>	 <p>Fall 2011</p> <p>Eligible to Enroll: Yes</p> <p>Primary Program: UGRD Undergraduate</p> <p>Academic Standing Status: Good Standing as of 2012-01-04</p> <hr/> <p>▼ Level / Load</p> <p>Academic Level - Projected: Senior</p> <p>Academic Level - Term Start: Senior</p> <p>Academic Level - Term End: Senior</p> <p>Approved Academic Load: Full-Time</p> <p>Academic Load: Enrolled Full-Time</p> <hr/> <p>▼ Classes</p> <p> <input checked="" type="checkbox"/> Enrolled <input type="checkbox"/> Dropped <input type="checkbox"/> Wait Listed </p> <table border="1"> <thead> <tr> <th>Class</th> <th>Description</th> <th>Units</th> <th>Grading</th> <th>Grade</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>BUS 316-003 (1539)</td> <td>Production Operations Mgt (Lecture)</td> <td>4.00</td> <td>Graded</td> <td>A</td> <td>✓</td> </tr> <tr> <td>ECON 205-002 (1529)</td> <td>Intro to Microeconomics (Lecture)</td> <td>4.00</td> <td>Graded</td> <td>A</td> <td>✓</td> </tr> <tr> <td>ECON 205-003 (1595)</td> <td>Intro to Microeconomics (Lecture)</td> <td>4.00</td> <td>Graded</td> <td></td> <td>✗</td> </tr> <tr> <td>GEOG 396-001 (3676)</td> <td>Special Topics in Area Studies (Seminar)</td> <td>4.00</td> <td>Graded</td> <td>B+</td> <td>✓</td> </tr> </tbody> </table>	Class	Description	Units	Grading	Grade	Status	BUS 316-003 (1539)	Production Operations Mgt (Lecture)	4.00	Graded	A	✓	ECON 205-002 (1529)	Intro to Microeconomics (Lecture)	4.00	Graded	A	✓	ECON 205-003 (1595)	Intro to Microeconomics (Lecture)	4.00	Graded		✗	GEOG 396-001 (3676)	Special Topics in Area Studies (Seminar)	4.00	Graded	B+	✓
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Lesson 2: Accessing a Student's Academic Information

Navigation: Faculty or Advisor Center

Step	Action	Screenshot
1	<p>From the Advisor Center select either Academics Tab, View Data for Other Students button or View Student Details.</p>	
2	<p>IF you chose academics tab OR IF you chose View Data for other Students:</p> <p>Enter the search information for the student and click search. Select the student if necessary.</p> <p>THEN click Academics Tab</p>	
3	<p>IF you chose View Student Details:</p> <p>Click the Academics Tab.</p>	

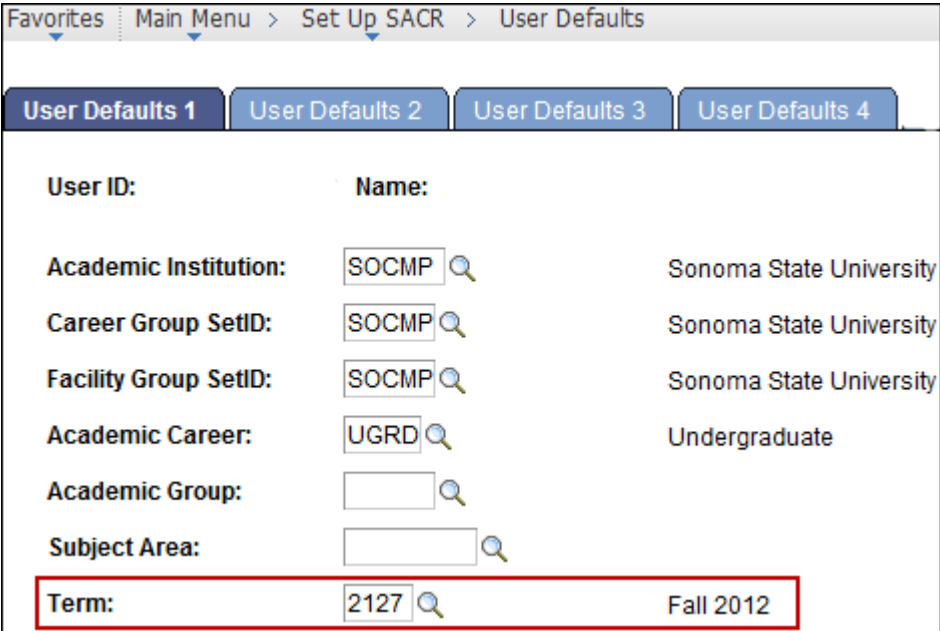
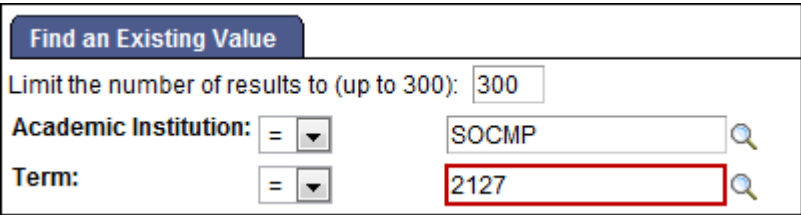
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4	<p>Scroll down on the Academics Tab page until you see</p> <p>Institution / Career / Program</p> <p>This is the student's current academic information including Major, Minor, Catalog Year, Admit Term, and more.</p>	 <p>The screenshot displays the 'Institution / Career / Program' page. On the left, a breadcrumb trail shows: SOCMP - Sonoma State University > UGRD - Undergraduate > UGRD - Undergraduate. On the right, a table lists student details:</p> <table border="1"> <tr> <td>Program:</td> <td>UGRD</td> <td>Undergraduate</td> </tr> <tr> <td>Student Career Nbr:</td> <td>0</td> <td></td> </tr> <tr> <td>Status:</td> <td>Active</td> <td>as of 02/22/2012</td> </tr> <tr> <td>Admit Term:</td> <td>2113</td> <td>Spring 2011</td> </tr> <tr> <td>Expected Graduation:</td> <td>2125</td> <td>Summer 2012</td> </tr> <tr> <td>Approved Load:</td> <td colspan="2">Full-Time</td> </tr> <tr> <td>Load Determination:</td> <td colspan="2">Base On Units</td> </tr> <tr> <td>Level Determination:</td> <td colspan="2">Base On Units</td> </tr> <tr> <td>Plan:</td> <td>BUS-BS</td> <td>Business Administration (BS)</td> </tr> <tr> <td>Requirement Term:</td> <td>2113</td> <td>Spring 2011</td> </tr> <tr> <td>Sub-Plan:</td> <td>BUS SPEC</td> <td>Special Concentration</td> </tr> <tr> <td>Requirement Term:</td> <td>2113</td> <td>Spring 2011</td> </tr> </table>	Program:	UGRD	Undergraduate	Student Career Nbr:	0		Status:	Active	as of 02/22/2012	Admit Term:	2113	Spring 2011	Expected Graduation:	2125	Summer 2012	Approved Load:	Full-Time		Load Determination:	Base On Units		Level Determination:	Base On Units		Plan:	BUS-BS	Business Administration (BS)	Requirement Term:	2113	Spring 2011	Sub-Plan:	BUS SPEC	Special Concentration	Requirement Term:	2113	Spring 2011
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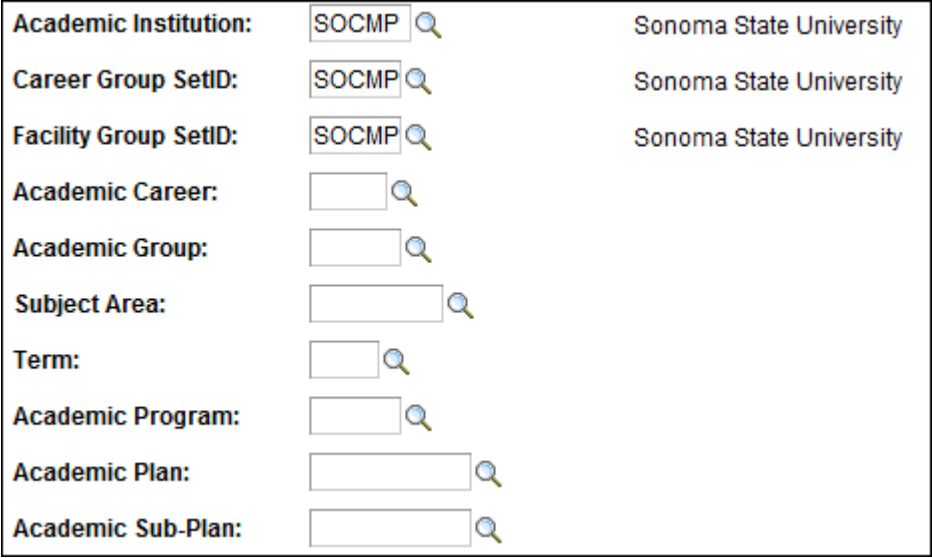
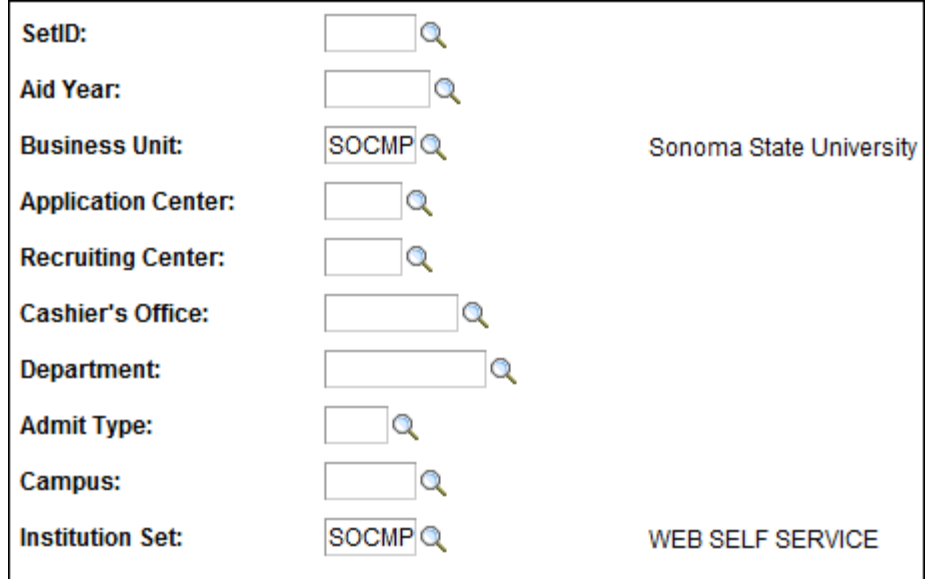
Lesson 3: User Defaults

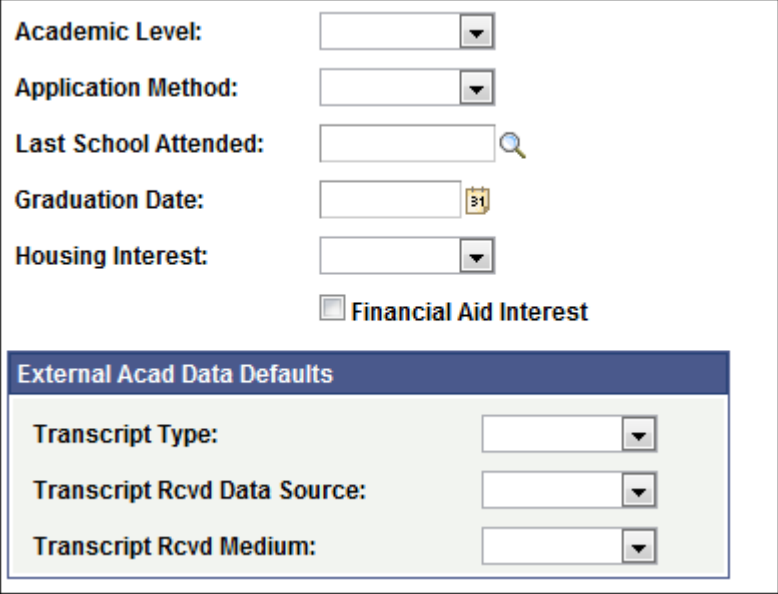
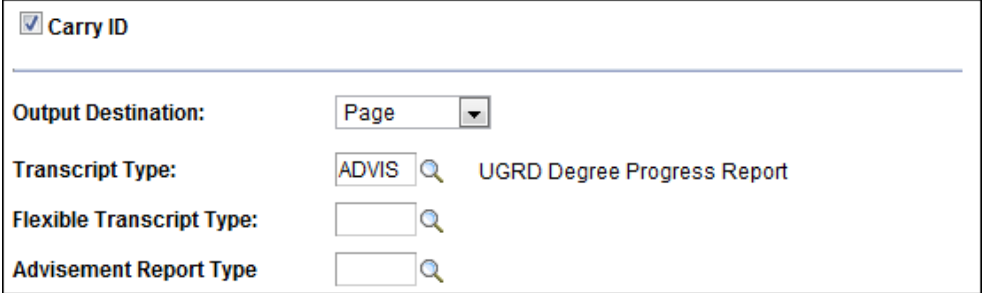
Navigation: Main Menu > Set Up SACR > User Defaults

Information

User defaults help to speed up accessing student records and data by pre-populating certain values that you choose. There are many options you can choose to auto-populate for you, below are just a few examples on how this can be helpful. Not all available defaults are helpful or necessary, identify any you use on a regular basis and update **only** those values. These can be changed at any time.

Step	Action	Screenshot
1	<p>TERM</p> <p>Set User Defaults 1 Term to the current term: 2127 (Fall 2012)</p>	
2	<p>When accessing a search page that has a Term prompt, 2127 will default for you.</p>	

Step	Action	Screenshot
3	<p>Displayed at the right are the default values accessible on the tab:</p> <p>User Defaults 1</p>	 <p>The screenshot shows the following fields and their values:</p> <ul style="list-style-type: none"> Academic Institution: SOCMP (Sonoma State University) Career Group SetID: SOCMP (Sonoma State University) Facility Group SetID: SOCMP (Sonoma State University) Academic Career: (empty) Academic Group: (empty) Subject Area: (empty) Term: (empty) Academic Program: (empty) Academic Plan: (empty) Academic Sub-Plan: (empty)
4	<p>Displayed at the right are the default values accessible on the tab:</p> <p>User Defaults 2</p>	 <p>The screenshot shows the following fields and their values:</p> <ul style="list-style-type: none"> SetID: (empty) Aid Year: (empty) Business Unit: SOCMP (Sonoma State University) Application Center: (empty) Recruiting Center: (empty) Cashier's Office: (empty) Department: (empty) Admit Type: (empty) Campus: (empty) Institution Set: SOCMP (WEB SELF SERVICE)

Step	Action	Screenshot
5	<p>Displayed at the right are the default values accessible on the tab:</p> <p>User Defaults 3</p>	 <p>The screenshot shows the 'User Defaults 3' tab with the following fields and values:</p> <ul style="list-style-type: none"> Academic Level: [Dropdown] Application Method: [Dropdown] Last School Attended: [Text] Graduation Date: [Text] Housing Interest: [Dropdown] <input type="checkbox"/> Financial Aid Interest External Acad Data Defaults (Section Header) Transcript Type: [Dropdown] Transcript Rcvd Data Source: [Dropdown] Transcript Rcvd Medium: [Dropdown]
6	<p>Displayed at the right are the default values accessible on the tab:</p> <p>User Defaults 4</p>	 <p>The screenshot shows the 'User Defaults 4' tab with the following fields and values:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Carry ID Output Destination: [Page] Transcript Type: [ADVIS] UGRD Degree Progress Report Flexible Transcript Type: [Text] Advisement Report Type: [Text]