

SIS Training Manual

NC State University

Basic Navigation

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1 SIS Navigation Basics Introduction

Welcome to SIS – the new Student Information System! This course covers basic concepts, terminology, and navigation techniques for SIS applications using a browser-based interface to view and update data. You may already be familiar with some of the information in this user guide since in some cases it is about accessing web pages in general.

1.1 Objectives

After completing this training, you will know how to:

- Sign into SIS through the MyPack web portal
- Use the navigation header, main menu, navigation folders, and page links
- Execute a search
- Move between pages using folder tabs and hyperlinks
- Use page elements
- Move from field to field
- Use toolbar buttons
- Use update pages for entering data
- Use scroll areas
- Insert rows of data
- Open a new window
- Set your favorites in the MyLinks dropdown menu
- Resolving Cashe issues
- Understand SIS terminology

1.2 Reminder

The screen shots in this document are only examples of what you will see on your workstation when using SIS. What you actually see may vary due to your access or slight modifications to screen design.

1.3 Terminology

New terms are defined within each section, additionally in the SIS Glossary located online at <http://www.fis.ncsu.edu/sis/training/resources.htm>

2 Internet Architecture

The Student Information System makes use of Internet technology to bring you applications. Since there is no special software actually installed on your computer, you can conveniently and securely sign on to the Student Information System from any computer that is connected to the Internet by using a web browser.

The Student Information System is made up of a navigational structure that uses menus, submenus, hyperlinks, and web pages. If you've ever browsed the Internet, you'll find Student Information System Internet architecture is a simple, intuitive way of working with the database.

The Student Information System works with the following web browser/operating systems:

	IE 5.5	IE 6	Netscape Communicator 7	Netscape Navigator 7	Firfox 1.0	Mozill1 1.7	Safari 1.2
Linux				X	X	X	
Mac OS 9				X			
MAC OS X				X	X	X	X
MS Windows 2000	X	X		X	X	X	
MS Windows 2003		X			X		
MS Windows 98	X	X			X	X	
MS Windows NT	X	X		X	X	X	
MS Windows XP		X	X	X	X	X	
Unix					X	X	

3 Troubleshooting Page Display Problems

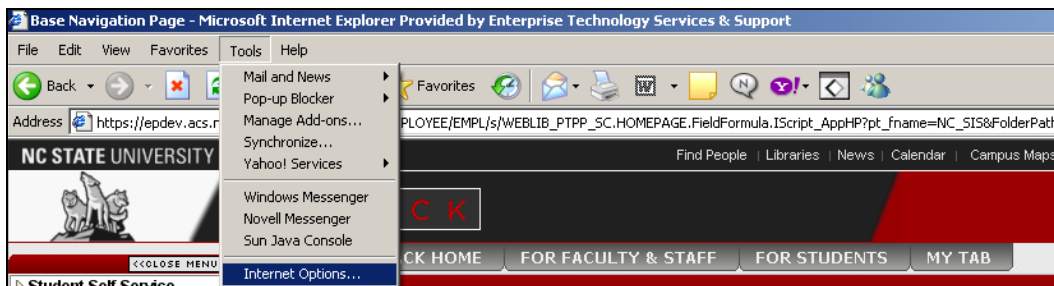
3.1 Clearing the Cache

A cache is a temporary storage area for frequently-accessed or recently-accessed data. Your computer stores information to make it faster for the computer to recall websites that you have visited. The problem with this is, when there are new pages or changes to a site your computer may go to the cache first to recall the page. So, you might be looking at the page from your cache that has since been updated. By clearing the browser cache you see the most recent documents presented on that site.

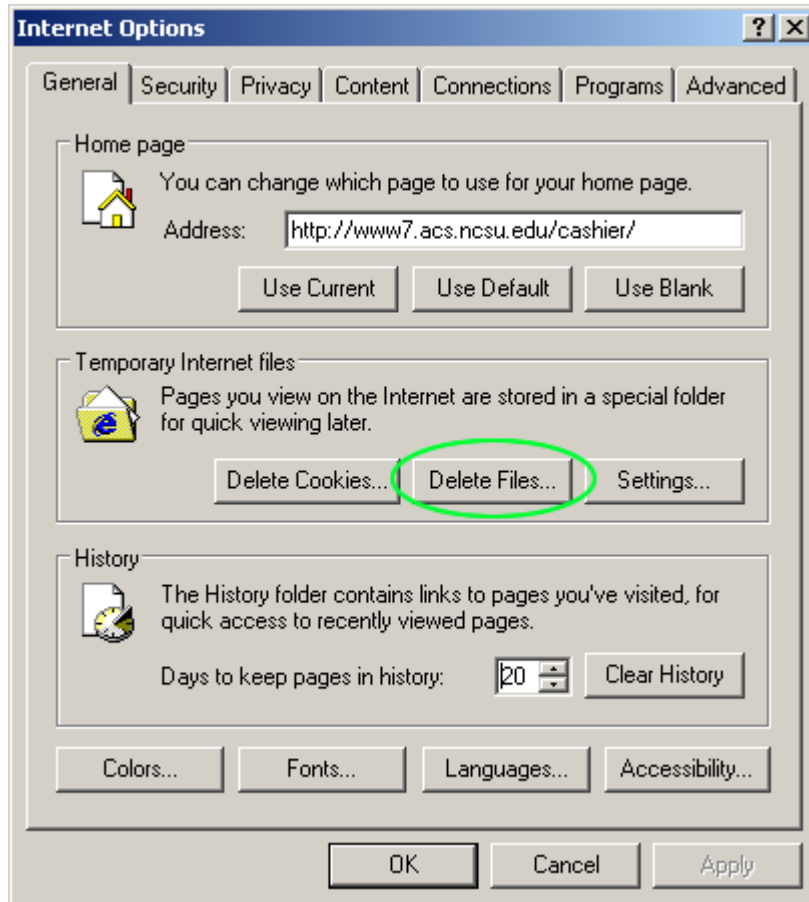
Open your web browser.

Click on Tools.

Click on Internet Options.



On the General tab under Temporary Internet file, click Delete files.



Click OK to close the dialog box.

Click Refresh on the toolbar to reload the page.

4 Signing into MyPack Portal and the Student Information System

4.1.1 MyPack Portal Login Screen

Signing in to the Student Information System is just like accessing a secure page on any website. You will launch the Student Information System via **MyPack** Portal. This portal allows you to access a wide range of online services. For example, you can use MyPack to access e-mail and calendars, view reports, purchase a parking sticker and launch the Student Information System or other NC State applications.

You must have a valid Unity ID and Password to access the Student Information System.

4.1.2 Navigation

<http://mypack.ncsu.edu>

You may also type mypack.ncsu.edu in the address bar. Additionally, there is a link to MyPack on the new NC State homepage.

Open a web browser such as Internet Explorer.

Type in the URL for MyPack Portal: <http://mypack.ncsu.edu>

NC STATE UNIVERSITY FIND PEOPLE LIBRARIES NEWS CALENDAR CAMPUS MAPS

MY PACK

MyPack Login

Username:

Password:

Sign In

Helpful Links

- [Course Catalog](#)
- [Schedule of Courses](#)
- [Curricula Information](#)
- [Graduation](#)
- [Academic Calendars](#)

■ [Change Unity Password](#)

■ [Login Help](#)

Welcome to the MyPack Portal!

Welcome to the NC State MyPack Portal, your one-stop source for information and resources from the NC State community. Inside you will find faculty, staff and student resources, including academic, financial and human resources information, as well as many other campus services. Start now to customize your MyPack experience.

NORTH CAROLINA STATE UNIVERSITY • RALEIGH, NC 27695 • 919.515.2011

When the sign in page displays, enter your Unity ID, press tab, and enter your password.

Note:

Notice that for security purposes, when you type the password, it will be shown with black dots instead of the actual characters.

Remember that the password is case sensitive.


Click  or press Enter.

Note:

You will be authenticated by your unity ID and password. If the sign in information you entered is valid, the system will display the portal homepage based on your security access.

The screenshot shows the MyPack Home interface. At the top, there's a navigation bar with 'MY PACK' and 'myPACK HOME' tabs. Below the tabs, there's a 'Portal Welcome' section with a table containing links for 'Students', 'Faculty', 'Staff', and 'How Do I?'. The 'Students' column includes a link 'Where Do I Find Enrollment?'. The 'Faculty' column includes 'Where Do I Submit Grades?'. The 'Staff' column includes 'What's Changed from the Admin Portal?'. The 'How Do I?' column includes 'Customize the Layout', 'Customize a Pagelet', and 'Add Pagelets'. Below the table, there are two news sections: 'news.ncsu.edu' and 'Natural Resources Library', each with a list of recent news items.

Note:

The SIS application is accessed through a secure website that strictly limits access to authorized users to protect the data in the system from unauthorized viewing and use. You can verify that it is "secure" because the URL starts with https instead of http and there will be a lock  displayed at the bottom of the web page.

Note:

The SIS application provides security based upon the concept of "roles." You will be assigned to a specific security role or roles in SIS and granted access based upon the tasks that you perform.

Terminology

Security Role: A profile of the functions and responsibilities of typical end-users, and it determines which menus and pages you will see when you launch SIS.

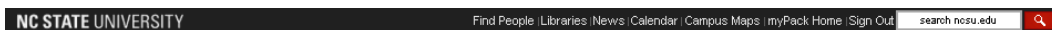
Examples: Director, Student Service Rep, Student

5 Navigation

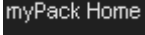
5.1 Using the Universal Navigation Header

5.1.1 MyPack Home Screen

The MyPack Home is the initial entry point into the portal. The page displays basic portal user tools and tips. The Universal Navigation Header can be found across the top of the page. The header will continue to appear at the top of the page even after you have navigated away from the MyPack homepage.




5.1.2 MyPack Home Link

When you click , no matter where you are in the application, you will return to the MyPack homepage.

5.1.3 Sign Out Link

To exit (quit) SIS or the portal in general, follow the steps below:

If you are performing a transaction, complete the task and save your data.

On the Navigation Header at the top of the page click  to sign out of the application. Once you've signed out, no one can access the site from your computer without logging in themselves.

Note:

Do NOT close your browser to exit from the system; always use the link noted above. For security purposes it is important that you use the sign out link when you are finished with your SIS session instead of simply closing the browser window. Whenever you access a secure site, it is recommended that you sign out to prevent another user from accessing the site through your browser window.

5.2 Using the Main Menu

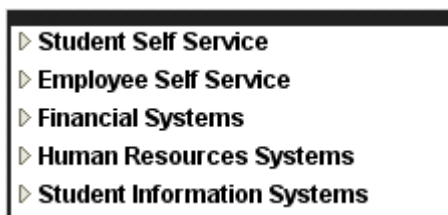
5.2.1 MyPack Home Screen

The homepage contains the Main Menu, which consists of a hierarchy of folders. Expanding and collapsing these folders is the primary means of getting around the portal and Student Information System.

Terminology

Main Menu: A general list of the areas you can access in the portal and in turn the SIS application.

The main menu should something look like this:



Note:

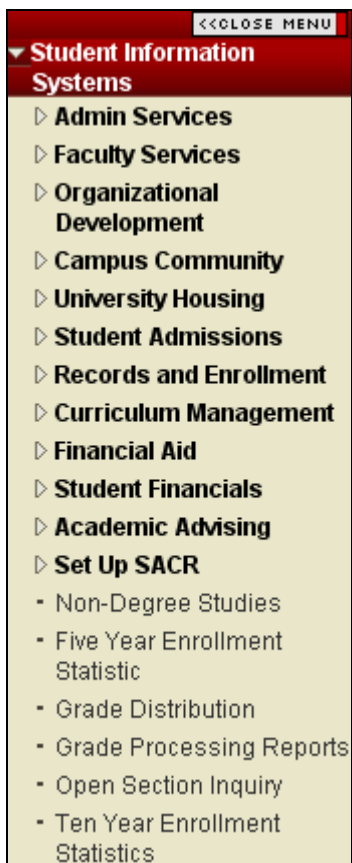
Your main menu will contain only the menu items you have been granted security to access, so it may have more, fewer, or different items on it than the one in the screen shot.

Click on a right-facing arrow ▶ to expand any menu entry.

Note:

From this point you can expand any folder to access additional folders that open transaction pages.

The main menu will look something like this after it has been expanded:

**Note:**

A dash before a listing indicates that it is a direct link to pages where transactions are performed or inquiries are made and that the menu item is expanded as far as it goes. These direct links represent a specific transaction or view of data already entered.

5.3 Minimizing and Expanding the Main Menu

5.3.1 MyPack Portal Homepage Screen

When you first sign in, the main menu looks like the one pictured here, with more or fewer menu items depending on your individual security.




5.3.2 Hide/ Unhide Main Menu

Select  to hide the main menu.

Select  to expand (reopen) your main menu.

Note:

When you minimize the main menu before selecting an item, you will be able to maximize it at any time by clicking  which will display in the upper left hand corner whenever the menu is minimized.

Terminology

Minimize: Hide (close) the main menu to free up space on your SIS page.

Maximize: Open the main menu on your SIS page.

5.4 Student Information System Homepage

5.4.1 Navigation

To access the SIS homepage, click the Student Information System menu item in the Main Menu on the left hand side of the screen.

5.4.2 Task Locations

The SIS menu item is where you will chose items to perform your daily student related tasks. The menu will include records, enrollment, campus community, student financials, financial aid, etc. based on your role and its associated security level.

Note:

Access to both Faculty and Administrative Services will be from the SIS menu in the portal.

The screenshot displays the NC State University myPACK website. At the top, there is a navigation bar with links for 'Find People', 'Libraries', 'News', 'Calendar', 'Campus Maps', 'myPack Home', and 'Sign Out'. Below this is a search bar for 'myLinks' and a 'Go' button. The main navigation tabs include 'myPACK HOME', 'FOR FACULTY & STAFF', 'FOR STUDENTS', and 'MY TAB'. The left sidebar contains a 'CLOSE MENU' button and a list of navigation folders: 'Student Self Service', 'Employee Self Service', 'Financial Systems', 'Human Resources Systems', 'Student Information Systems', 'Admin Services', 'Faculty Services', 'Organizational Development', 'Campus Community', 'University Housing', 'Student Admissions', 'Records and Enrollment', 'Curriculum Management', 'Financial Aid', 'Student Financials', 'Academic Advising', and 'Set Up SACR'. The main content area is titled 'STUDENT INFORMATION SYSTEMS' and features a grid of folders and links, including 'Non-Degree Studies', 'Five Year Enrollment Statistic', 'Grade Distribution', 'Grade Processing Reports', 'Open Section Inquiry', 'Ten Year Enrollment Statistics', 'Admin Services', 'Faculty Services', 'Organizational Development', 'Campus Community', 'University Housing', and 'Student Admissions'. Each folder contains a list of sub-links and icons.

5.5 Using the Navigation Folders and Page Links

5.5.1 Overview

The main menu, the navigation folders, subfolders, and page links are the tools you'll use to navigate to where you'll do your work.

If the main menu is used for navigation, you may view submenus by clicking on the actual word. When the word is selected, the submenus display in the left menu bar and the folders for that menu also display on the right side of the window, with the page links in each folder also displayed.

This screenshot is identical to the one above, showing the NC State University myPACK website interface. It highlights the navigation structure, including the top navigation bar, the left sidebar menu, and the main content area with various folders and links under the 'STUDENT INFORMATION SYSTEMS' heading.

Terminology

Menu: A list of options from which you can choose. You can choose an item from the menu by simply pointing to the item with a mouse and clicking one of the mouse buttons.

Folders: Serve as an alternative to the main menu and provides access to the pages needed to complete your transactions.


Subfolders: A folder inside another folder that is displayed in the left menu bar and on the right side of the window.

Submenu: Used to describe a menu that is contained within another menu.

Page Links: Displayed as hyperlinks, meaning that you can click the highlighted word to open the selected page. Page links are in the menu (left side), in folders (right side) or in "breadcrumbs" (top left).

Breadcrumbs: Designated by an angled (>) brace and allow you to retrace your steps (by selecting any previous "link" to navigate directly back to that level).

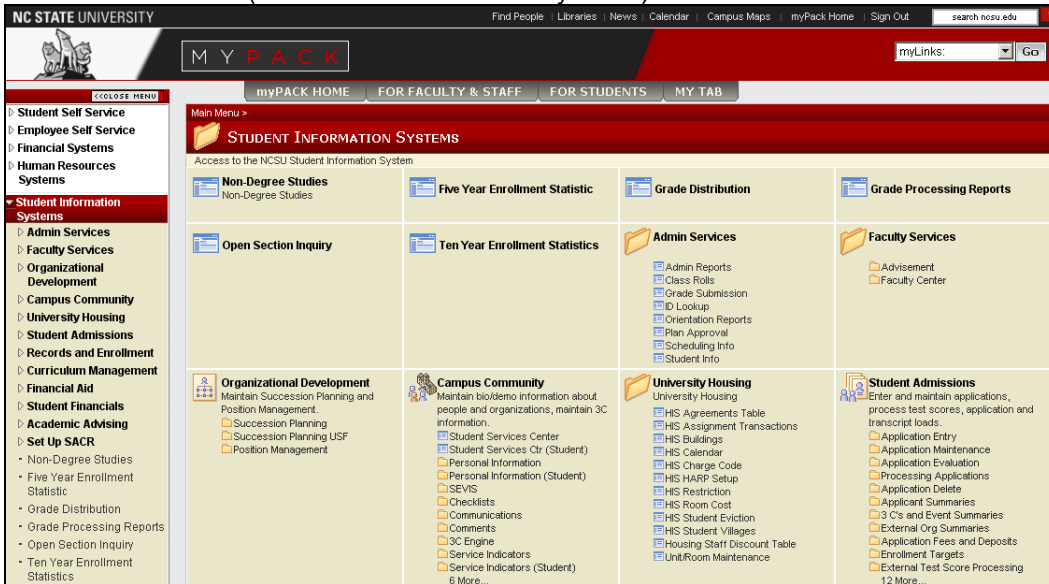
Note:

Selecting  will take you to a content page.

When you see a dash in front of a menu item it is an indication that there are no submenus or subfolders available beneath the item. To access items preceded by a dash, click on the word (hyperlink).



Select a main folder (ex. Student Information Systems)



Select a subfolder (ex. Campus Community)

The screenshot shows the myPACK interface for a student. The left-hand navigation menu is expanded to show 'Campus Community'. The main content area is titled 'CAMPUS COMMUNITY' and contains a grid of subfolders:

- Student Services Center**: View an at-a-glance overview of a student's information. Find quick links to more detailed information and to common administrative tasks.
- Student Services Ctr (Student)**: View an at-a-glance overview of a student's information. Find quick links to more detailed information and to common administrative tasks.
- Personal Information**: Enter personal data, biographical, health, identification and participation information.
- Personal Information (Student)**: Enter personal data, biographical, health, identification and participation information for a student.
- SEVIS**: Maintain and evaluate SEVIS reportable information for F, M and J visa holders.
- Checklists**: Manage checklists for a person, an external organization or an event.
- Communications**: Manage communications for a person or an external organization.
- Comments**: Track comments for a person or external organization.

Select a subfolder (ex. Personal Information Student)

The screenshot shows the myPACK interface for a student. The left-hand navigation menu is expanded to show 'Personal Information (Student)'. The main content area is titled 'PERSONAL INFORMATION (STUDENT)' and contains a grid of subfolders:

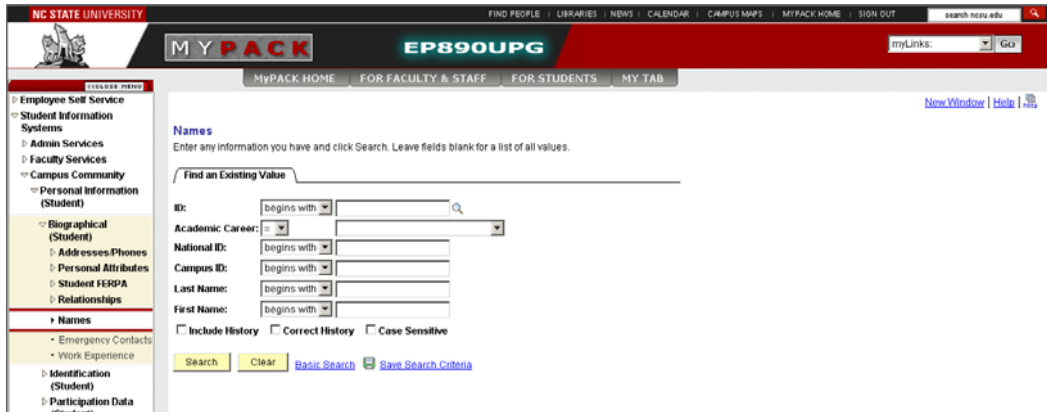
- Search/Match**: Manual search utility to prevent duplicate entry of an existing ID.
- Address Search**: Enter criteria to search for an individual's address.
- Add/Update a Person**: Add or modify Biographical information about a student.
- Biographical (Student)**: Manage a student's biographical data.
- Identification (Student)**: Create, change, or delete information that identifies a student.
- Participation Data (Student)**: Enter, update, or delete a student's extracurricular activities data.
- Biodemo Processes (Student)**: Process Seasonal Addresses, Address Links, and process report for Address Listing.
- Health Information (Student)**: Manage health data.

Select a subfolder (ex. Biographical Student)

The screenshot shows the myPACK interface for a student. The left-hand navigation menu is expanded to show 'Biographical (Student)'. The main content area is titled 'BIOGRAPHICAL (STUDENT)' and contains a grid of subfolders:

- Names**: Enter, update, or review a student's names.
- Emergency Contacts**: Enter, update, or review a student's names.
- Addresses/Phones**: Manage a student's addresses and phone numbers.
- Personal Attributes**: Manage a student's personal characteristics.
- Student FERPA**: Manage a student's requests related to the Family Educational Rights and Privacy Act (FERPA).
- Relationships**: Track relationships for a student.
- Work Experience**: Track a student's work experience.

Select a direct page link (ex. Names) and you will be directed to the Names page.



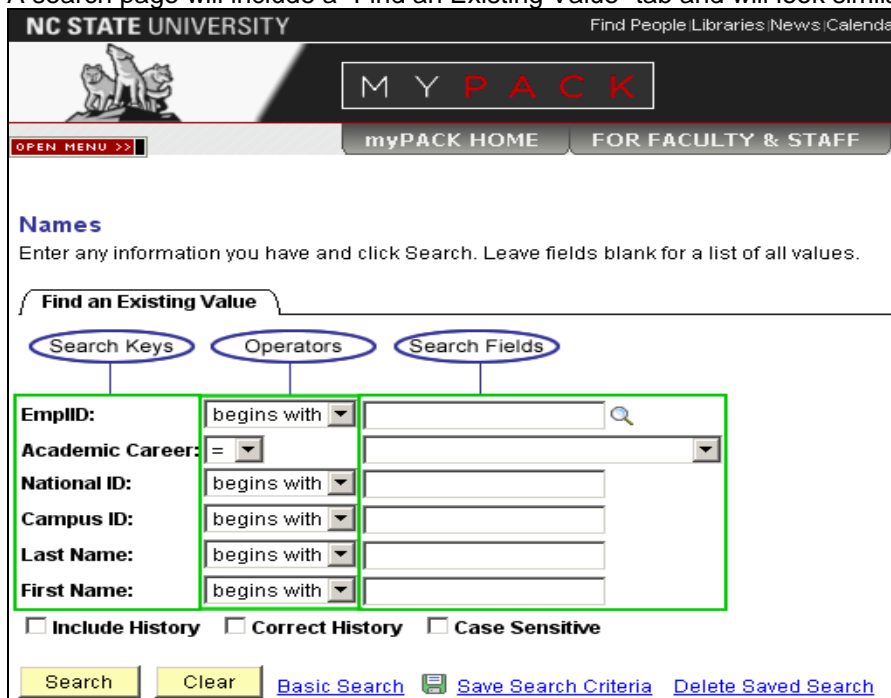
6 Conducting a Search

6.1 Introduction

This chapter describes how to execute a search. When you open a task (using a hyperlink or page link), either an entry page will display or a search page will appear prompting you for search keys needed to locate a record.

6.1.1 Find An Existing Value tab

A search page will include a “Find an Existing Value” tab and will look similar to this:



Search pages contain Search Keys, Operators, and Search Fields.

Terminology

Search keys: Key data elements that may be used when a search is conducted. For most searches in SIS, EmpID is a search key and in many cases, it must be used when conducting a search.

Operators: Conditions that can be changed which allow a search to be done with limited or partial information. A common operator is equal to (=). When this is used, the search results will return records that are exactly the same as the entered data. For example, if Last Name = JOHNS, all search results will have a last name of JOHNS. On the other hand is operator for last name is set to “begins with” and you enter JOHNS in the search field, all people with the last name JOHNS and JOHNSON will be returned in the results list

Search fields: Fields for entering data to be used in the search process. In the search process, all fields do not need to be used. A search may be successful using only one search field.

6.1.2 Search

To find a record, or many records, search criteria must be entered.

Names

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

Find an Existing Value


ID:

National ID:

Last Name:

First Name:

Include History Correct History Case Sensitive

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

Note:

You will not need to enter data in all of the search fields. If you have a unique identifier for a record, such as EmplID, your search will be easily completed.

Click to process the search.

If you wish to refresh the page (without saving), so you can enter new or different criteria, click

.

6.2 Operators

A down arrow next to an operator indicates the availability of a drop-down list. There are various search options available that allow for enhanced search capabilities.

Operators	How and when to use
begins with	If you know the first part of the search key only
contains	If you know the search key includes certain values
=	If you know the exact word or number
Not =	If you want to exclude certain records from being returned
<	If you want a value less than
<=	If you want a value less than or equal to
>	If you want a value greater than
>=	If you want a value greater than or equal to
between	If you want a value between two values
in	If you know the exact number, character fields do not allow

Note:

If you know that the student's last name is Mouse, "=" would be used with the exact and full last name to find that student:

Last Name:

If only the first few characters of the last name were known, MOU could be entered in the field and the search option of "begins with" could be utilized:

Last Name:

The wildcard (%) could be used with "=" to find all records that begin with MOU:


Last Name:

The wildcard (%) can be used for either numerical or alphabetical characters. As a "wildcard" it instructs the application to search for the known values and stands in place of unknown values. The wildcard could be used in the following ways to search for the data MOUSE:

- = %USE
- = MOU%
- = %MOU%




Numbered items, like ID, require preceding zeros when searching by exact number.

6.3 Using Look Up


A magnifying glass  next to a field indicates that a look up option is available for the field. When the magnifying glass is clicked, the look up page opens and the needed data may be selected.

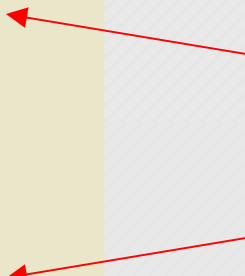
Enrollment Summary
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmpID:	begins with	<input type="text"/>	
Academic Career:	=	Non Degree Status	
Academic Institution:	begins with	NCSU1	
Term:	=	<input type="text"/>	
Campus ID:	begins with	<input type="text"/>	
National ID:	begins with	<input type="text"/>	
Last Name:	begins with	<input type="text"/>	
First Name:	begins with	<input type="text"/>	
Term Alternate Key:	=	<input type="text"/>	

Case Sensitive

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




Use the Look up tool on the Term Alternate Key search field.

6.3.1 Search Results Page

The Look Up page Search Results list provides hyperlinks to the valid values resulting from your search. Click a hyperlink for the value you wish to select. Clicking one of these hyperlinks takes you back to the page where you were conducting a search with that particular value automatically entered into the field you were searching on.



Look Up Term

Academic Institution:	NCSU1	
Academic Career:	NDS	
Term:	begins with ▾	<input type="text"/>
Description:	begins with ▾	<input type="text"/>
Short Description:	begins with ▾	<input type="text"/>
Term Begin Date:	= ▾	<input type="text"/> 

[Basic Lookup](#)

Search Results

[View All](#)

 First  1-100 of 164  [Last](#)

Term	Description	Short Description	Term Begin Date
2108	2010 Fall Term	Fall '10	08/22/2010
2107	2010 Summer Term 2	Sum2 '10	07/08/2010
2106	2010 Summer Term 1	Sum1 '10	05/19/2010
2101	2010 Spring Term	Spring '10	01/09/2010
2098	2009 Fall Term	Fall '09	08/20/2009
2097	2009 Summer Term 2	Sum2 '09	07/07/2009
2096	2009 Summer Term 1	Sum1 '09	05/18/2009
2091	2009 Spring Term	Spring '09	01/07/2009
2088	2008 Fall Term	Fall '08	08/20/2008
2087	2008 Summer Term 2	Sum2 '08	05/08/2008
2086	2008 Summer Term 1	Sum1 '08	04/23/2008

6.4 Saving Search Criteria

If you will be conducting the same search multiple times, you may wish to use the Save Search Criteria feature.

6.4.1 Perform Search

To use the Save Search Criteria feature, complete a search.

On a search page, enter search information that you will use multiple times, such as term.

Enrollment

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

Find an Existing Value

Use Saved Search:

ID: begins with

Academic Career: =

Academic Institution: begins with

Term: =

Campus ID: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

Term Alternate Key: = 2078

Case Sensitive

[Basic Search](#) [Delete Saved Search](#)

Search Results

[View All](#)

First 1-91 of 91 Last

ID	Academic Career	Academic Institution	Term	Short Description	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name	Term Alternate Key
000033812	Graduate	NCSU1	2078	Fall '07	Custard,Marie	(blank)	(blank)	(blank)	*****	USA	SSN	CUSTARD	MARIE	2078
000033812	Undergrad	NCSU1	2078	Fall '07	Custard,Marie	(blank)	(blank)	(blank)	*****	USA	SSN	CUSTARD	MARIE	2078
000033856	Undergrad	NCSU1	2078	Fall '07	Um,Avis	(blank)	(blank)	(blank)	*****	USA	SSN	UM	AVIS	2078
000900484	Undergrad	NCSU1	2078	Fall '07	Prichett,Cesar	(blank)	(blank)	(blank)	*****	USA	SSN	PRICHETT	CESAR	2078
000900485	Undergrad	NCSU1	2078	Fall '07	Eling,Johnathan	(blank)	(blank)	(blank)	*****	USA	SSN	ELING	JOHNATHAN	2078
000900486	Undergrad	NCSU1	2078	Fall '07	Gripp,Alvina	(blank)	(blank)	(blank)	*****	USA	SSN	GRIPP	ALVINA	2078
000900616	Undergrad	NCSU1	2078	Fall '07	McClellan,Laura	Female	09/02/1964	(blank)	*****	USA	SSN	MCCLEAN	LAURA	2078
000900626	Undergrad	NCSU1	2078	Fall '07	ZZOPPP,JOHN	(blank)	(blank)	(blank)	*****	USA	SSN	ZZOPPP	JOHN	2078

6.4.2 Saving the Search

Click [Save Search Criteria](#).

6.4.3 Name Search

Enter a name for the search.

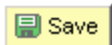
Save Search As

Name the search and then click Save.

Name of Search:

The saved search will contain these values:

ID: begins with
Academic Career: =
Academic Institution: begins with
Term: =
Campus ID: begins with
National ID: begins with
Last Name: begins with
First Name: begins with
Term Alternate Key: = 2078



Save

[Return to Advanced Search](#)

6.4.4 Save

Click Save.

6.4.5 Return to Search page

Click [Return to Advanced Search](#).

6.4.6 Using a Saved Search

After the search is saved, the Use Saved Search option becomes available on the search page. Use this dropdown menu to locate a previously saved search and use it again. The search is automatically completed.

Course Catalog

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

Find an Existing Value | **Add a New Value**

Use Saved Search: **BIO Courses**

Academic Institution: [=]

Subject Area: [=]

Catalog Nbr: [begins with]

Campus: [begins with]

Course ID: [begins with]

Description: [begins with]

Include History Correct History Case Sensitive

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

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

6.4.7 Deleting a Saved Search

If you decide you no longer want to use the search criteria, click the [Delete Saved Search](#) link, which allows you to delete a search you have named and saved.

6.5 Viewing Search Results

The Search Results will be displayed in the Find An Existing Value tab.

After you press **Search**, you will see *Processing* flashing in the upper right corner of your SIS window as your search is being executed.

6.5.1 Results

The Search Results list will display at the bottom of the page.

Search Results First 1 of 91 Last

[View All](#)

ID	Academic Career	Academic Institution	Term	Short Description	Name	Gender	Date of Birth	Campus	National ID	National ID Country	NID Short Description	Last Name	First Name	Term Alternate Key
000033812	Graduate	NCSU1	2078	Fall '07	Custard, Marie	(blank)	(blank)	(blank)	*****	USA	SSN	CUSTARD	MARIE	2078
000033812	Undergrad	NCSU1	2078	Fall '07	Custard, Marie	(blank)	(blank)	(blank)	*****	USA	SSN	CUSTARD	MARIE	2078
000033856	Undergrad	NCSU1	2078	Fall '07	Um, Avis	(blank)	(blank)	(blank)	*****	USA	SSN	UM	AVIS	2078
000900484	Undergrad	NCSU1	2078	Fall '07	Pritchett, Cesar	(blank)	(blank)	(blank)	*****	USA	SSN	PRICHETT	CESAR	2078
000900485	Undergrad	NCSU1	2078	Fall '07	Fling, Johnathan	(blank)	(blank)	(blank)	*****	USA	SSN	FLING	JOHNATHAN	2078
000900486	Undergrad	NCSU1	2078	Fall '07	Gripp, Alvina	(blank)	(blank)	(blank)	*****	USA	SSN	GRIPP	ALVINA	2078
000900616	Undergrad	NCSU1	2078	Fall '07	McClellan, Laura	Female	09/02/1964	(blank)	*****	USA	SSN	MCCLELLAN	LAURA	2078
000900626	Undergrad	NCSU1	2078	Fall '07	ZZOPPP, JOHN	(blank)	(blank)	(blank)	*****	USA	SSN	ZZOPPP	JOHN	2078
000900627	Undergrad	NCSU1	2078	Fall '07	ZZZZO, JOHN	(blank)	(blank)	(blank)	*****	USA	SSN	ZZZZO	JOHN	2078
000900647	NDS	NCSU1	2078	Fall '07	Ju, Tae Pstest	(blank)	08/24/1970	(blank)	*****	USA	SSN	JU	TAE	2078
000900651	Graduate	NCSU1	2078	Fall '07	Balme, Geoffrey Pstest	(blank)	06/22/1964	(blank)	*****	USA	SSN	BALME	GEOFFREY	2078

Note:

If your search generates a list with many columns you may need to use the scroll bar to the right of the window to view the entire list.

Note:

The Search Results will only display 300 results. If the search page shows the sentence, “Only the first 300 results can be displayed”, then you may want to enter more search criteria to further narrow the search results. Searches with few criteria may take a long time to complete. The more criteria you enter into the search, the faster results will be returned.

7 Navigating through Pages to View Information

When a hyperlink is selected from the main menu, the pages within the selected activity are always related to each other and usually, represent data that is part of a transaction.

7.1 Using Folder Tabs

Once you have entered your search criteria, clicked [Search](#), located and selected the record you need to view, this is an example of what you'll see:

The screenshot shows the NC State University myPACK interface. At the top, there is a navigation bar with tabs for 'myPACK HOME', 'FOR FACULTY & STAFF', 'FOR STUDENTS', and 'MY TAB'. Below this, there are folder tabs for 'Term Activation', 'Enrollment Limit', 'Student Session', 'Terms In Residence', 'Term Control Dates', and 'External Study'. The main content area displays a student record for Juliane Kolich (ID: 000000003). The record includes fields for 'Academic Career' (Undergraduate), 'Academic Institution' (NCSU1), 'Term' (Spring '07), 'Student Career Nbr' (0), 'Academic Level - Projected' (Freshman), 'Academic Level - Term Start' (Freshman), 'Academic Level - Term End' (Freshman), 'Level Determination' (Units), 'Academic Year' (2006), 'Form of Study' (Enrollment), 'Academic Load' (No Units), and 'Billing Career' (UGRC). There are also buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

Click on the folder tabs at the top of the page to navigate between pages.

This image shows a close-up of the folder tabs at the top of the page. The tabs are labeled 'Term Activation', 'Enrollment Limit', 'Student Session', 'Terms In Residence', 'Term Control Dates', and 'External Study'.

7.2 Using Hyperlinks

Click on the hyperlinks at the bottom of the page to navigate between pages.

[Term Activation](#) | [Enrollment Limit](#) | [Student Session](#) | [Terms In Residence](#) | [Term Control Dates](#) | [External Study](#)

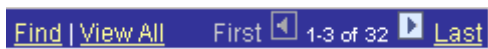
Note:

The folder tabs across the top of the page are identical to the hyperlinks at the bottom of the page. Both tabs and hyperlinks are available, to give you more flexibility. You may use either the tab or the hyperlink to get to the next page.

7.3 Understanding and Using Scroll Areas

Instead of a traditional scroll bar, Scroll Areas use buttons and links on the blue Navigation bar to scroll through the various rows of data. You can view all the rows of data, view the first or last row of data, scroll through each row of data and on some pages perform simple searches to find a specific string of data. Just click on the link or button to perform the desired function.

The  and  buttons are provided on a page to help you scroll through data in a record.





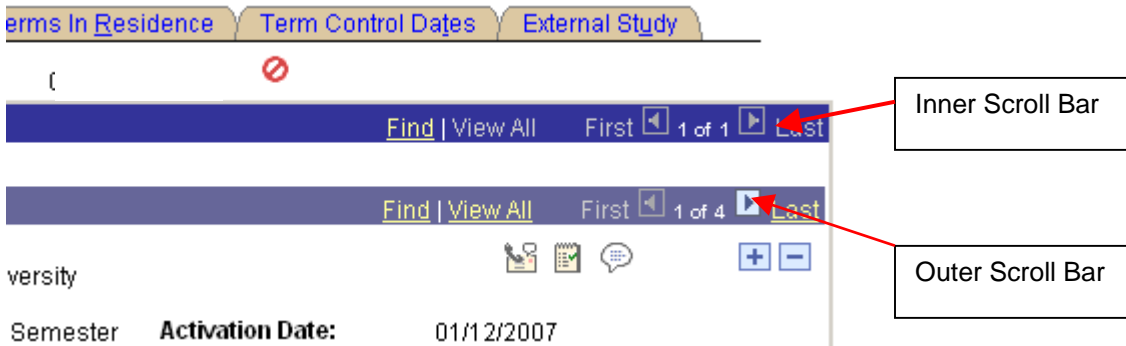
Scroll Area:

Allows you to add, edit and view multiple rows of data for a group of fields on a page.

Note:

The Navigation bar includes a numbering system for the rows.

In the example, the header reads 1-3 of 32. That means the Scroll Area contains thirty-two rows of data, is set up to view only three rows at a time. Click  or  to view the next or previous row of data. Normally rows of data are effective dated and allow a means of viewing a history about the student's activity in a certain context.



Find:

Prompts you to enter the string of data you want to find. The Find function limits the search to the data within the Scroll Area only. When it finds the first occurrence of your search string, it opens that row of data in the Scroll Area



View All:

Allow you to see all the rows of data (history) on a page.

Academic Career: Undergraduate		Find View All		First	1 of 1	Last
Find View 1						
'Academic Institution:	<input type="text" value="NCSU1"/> NC State University					
'Term:	<input type="text" value="2071"/> Spring '07 Semester	Activation Date:	<input type="text" value="01/12/2007"/>			
Student Career Nbr:	<input type="text" value="0"/> Physical & Math Sciences	Academic Year:	<input type="text" value="2006"/>			
Override All Academic Levels:	<input type="checkbox"/>	Load Determination:	<input type="text" value="Units"/>			
Override Projected Level:	<input type="checkbox"/>	'Form of Study:	<input type="text" value="Enrollment"/>			
Academic Level - Projected:	Freshman	Academic Load:	<input type="text" value="No Units"/>			
Academic Level - Term Start:	Freshman	'Billing Career:	<input type="text" value="UGRC"/>			
Academic Level - Term End:	Freshman	Eligible To Enroll:	<input type="checkbox"/>			
Level Determination:	Units					
'Academic Institution:	<input type="text" value="NCSU1"/> NC State University					
'Term:	<input type="text" value="2068"/> Fall '06 Semester	Activation Date:	<input type="text" value="03/07/2006"/>			
Student Career Nbr:	<input type="text" value="0"/> Physical & Math Sciences	Academic Year:	<input type="text" value="2006"/>			
Override All Academic Levels:	<input type="checkbox"/>	Load Determination:	<input type="text" value="Units"/>			
Override Projected Level:	<input type="checkbox"/>	'Form of Study:	<input type="text" value="Enrollment"/>			
Academic Level - Projected:	Freshman	Academic Load:	<input type="text" value="No Units"/>			
Academic Level - Term Start:	Freshman	'Billing Career:	<input type="text" value="UGRC"/>			
Academic Level - Term End:	Freshman	Eligible To Enroll:	<input type="checkbox"/>			
Level Determination:	Units					

8 A Closer Look At Pages

8.1 Page Elements

Typical field types you can see on a page may include:

Checkbox (dotted) – Use the TAB key to move the cursor to the checkbox, or you can click directly on the checkbox. Click once on the checkbox to select it or to clear it. You can also press the Spacebar to select or clear the checkbox.

Drop-down list (solid) – Click on the arrow to expand the box so it shows you a list of valid values. To select a single item from the list, click the arrows until your choice is visible and then click the item itself.

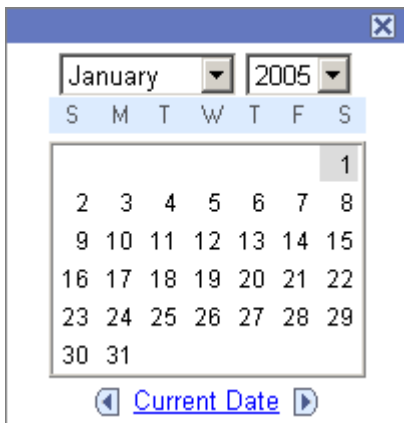
Edit Box – Type data into the field.

Edit Box with Look-up button (dashed) – Click the look-up button to open a Look Up page and search the database tables for the value you need.

*Academic Institution: NC State University
 *Term: Spring '07 Semester Activation Date: 01/12/2007
 Student Career Nbr: Physical & Math Sciences
 Override All Academic Levels: Academic Year: 2006
 Override Projected Level: Load Determination: Units
 Academic Level - Projected: Freshman *Form of Study:
 Academic Level - Term Start: Freshman Academic Load: No Units
 Academic Level - Term End: Freshman *Billing Career:
 Level Determination: Units Eligible To Enroll:

Calendar – Click the calendar button to pop-up a small calendar on the page. Press the ESC key to cancel and close the calendar.

*Effective Date: 



Radio Button – Radio buttons are usually grouped together in a group box, so you can see all the options available to you. Only one radio button in a group can be selected at one time. To select a radio button, click in the desired circle or button.

Click on an item to view

All Service Indicators
 Positive Service Indicators
 Negative Service Indicators

8.2 Navigate Through a Record

Once you enter data or select a value for a field, tab out of the field. This allows the system to properly process the data that you entered.

To backup and return to previous fields, use the SHIFT+TAB keys.

Terminology

Required Fields: You must enter data into a required field to continue on to the next field or to save the page. Required fields are marked with an asterisk (*).


Note:

If you save the page without entering data in a required field, an error message opens on the page. Click to close the error message and then enter the correct data into the field.

Terminology

Formatted Fields: Require that you enter data so it appears in a specific format. All you have to do is enter the characters.

Example: National ID (Social Security Number), Phone Number, Date, and Zip Code. For date fields, enter the date using the standard MMDDYYYY format (include zeros). Social Security number is used here only as an example. Users will typically not have access to view student Social Security numbers.

Active Date: 

SIS automatically inserts the appropriate dashes and slashes for you.

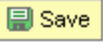

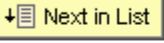





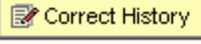
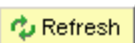
Active Date: 

8.3 Toolbar Buttons

The toolbar is located at the bottom of most pages. The buttons on the toolbar may include search list navigation buttons, page navigation buttons, and page action buttons. The buttons that you see will change depending upon the type of page you are on. In addition, some buttons may be grayed out, indicating that you can't perform that action at that time.




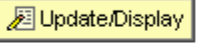
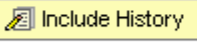
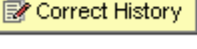
List of possible toolbars located on following page.

Button	Name	Function
 Save	Save	Sends the information you've entered on the page to the database. You'll generally save when you come to the end of a component. The Save command always updates the data for all pages in a group. Upon save, the system displays the "Saved" message in the upper right corner of the page.
 Return to Search	Return to Search Page	Returns you to the search page.
 Next in List	Next in List	Displays the data for the next data row in your search results grid. This button appears gray if you didn't select the data row from a search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.
 Previous in List	Previous in List	Displays the data for the previous data row in your search results grid. This button appears gray if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data displayed is the last row in the grid.
 Next tab	Next Page in Component	Displays the next page in the current component. If you are in the last page of the component, this button is gray.
 Previous tab	Previous Page in Component	Displays the previous page in the current component. If you're in the first page of the component, this button is gray.
 Update/Display	Update/Display	Accesses existing rows of data on the database. If data is effective-dated, displays only current and future rows.
 Include History	Include History	Displays all rows of data: current, future, and history.
 Correct History	Correction	Accesses existing rows of data in the database and displays all effective-dated rows. Allows you to update all rows, including history rows.
 Refresh	Refresh Page	Appears for expert users only that are in Expert Entry mode. When clicked, validates the data entered in certain fields.

9 Data Entry Basics

9.1 Understanding Data Entry Action Modes

There are four Action Modes that may be available on a page depending on your security level within SIS: Add, Update/Display, Include History, and Correct History (or Correction mode).

Page Buttons	Description
	Adds a new row of information to the database with a new high level primary key. You will use this mode to add a new student to the database.
	When adding a new record you MUST include a minimum of Name and Date of Birth and/or National ID (Social Security Number).
	The default action mode and most frequently used of any mode. Used to view or update data for a high-level key. Displays only Current and Future rows of data for review. You can update Future rows, but not Current rows. You can also insert a new Current row to update data.
	Used to review the history of a record. Displays ALL rows of data (History, Current and Future). However, you can only update Future rows. You can also insert a new Current row.
	Displays ALL rows of data (History, Current and Future) and allows you to update or correct any row. You can also insert new rows regardless of the Effective Date or Sequence Number.
	Warning!! Use this mode with extreme caution. For example, History rows should only be updated to fix data entry errors.

Terminology

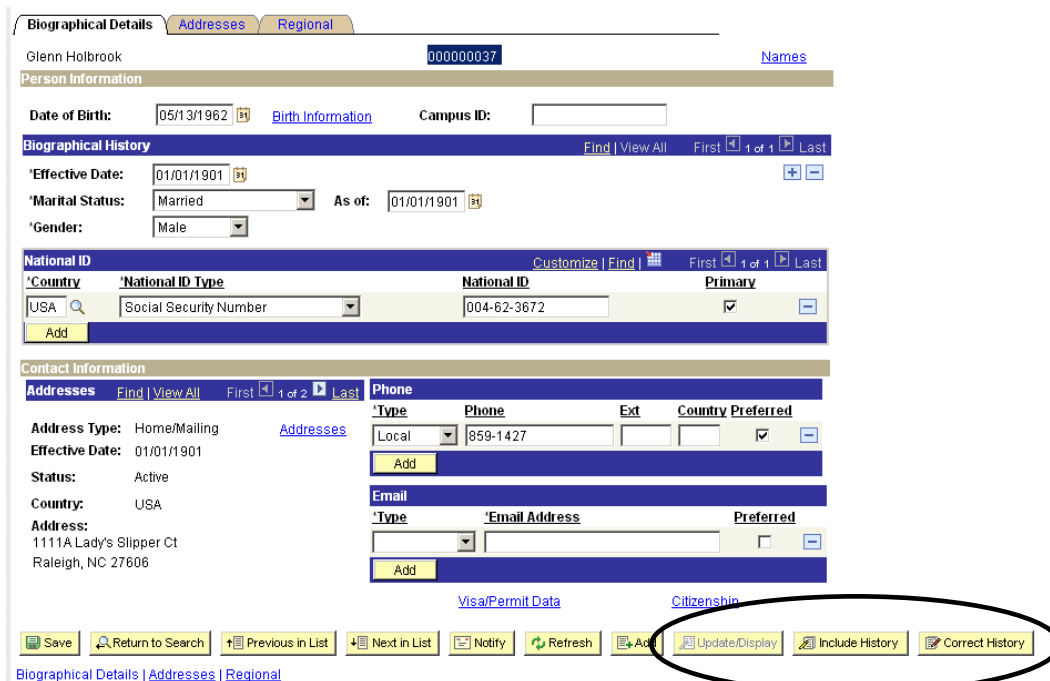
Modes: Type of actions you can perform (within a page) once you retrieve information from the database.

Example: Add, Update/Display, Include History, and Correct History

Access to “Correct History” will be based on security level. Not all staff will have access to this function.

Note:

These buttons are located on the Toolbar at the bottom right of each page on which they are applicable. A grayed-out button indicates the page is currently in that mode.




The screenshot shows a web application interface for a student record. The interface is divided into several sections: 'Biographical Details', 'Addresses', and 'Regional'. The 'Biographical Details' section includes fields for 'Date of Birth', 'Campus ID', 'Biographical History', 'Effective Date', 'Marital Status', and 'Gender'. The 'National ID' section includes fields for 'Country', 'National ID Type', 'National ID', and 'Primary'. The 'Contact Information' section includes fields for 'Addresses', 'Phone', and 'Email'. At the bottom right, there is a toolbar with buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The 'Update/Display', 'Include History', and 'Correct History' buttons are circled in black.

Note:

The system defaults to the Update/Display action whenever you retrieve data from the database unless you check one of the History checkboxes or the Add hyperlink on the Search page.


9.2 Inserting and Deleting Rows of Data within a Record

When you update information in SIS, you do not want to overwrite the data that is already stored in the database. To retain this history, you insert (or add) a new row of data.

To add a new row of data, click the  button. When you insert a new row, notice that the system copies the existing data into the new row and the current date (today's date) appears in the Effective Date field. All you need to do is enter the data that is changing and enter the appropriate Effective Date.

Note:





If you exit the page without saving, the changes will not be saved to the database. When you insert a new row, the navigation bar will change to show that there is another row of data.

You can also delete the current row of data. Select the row you want to delete, and then, click the  button. You will be asked to confirm that you want to delete the row. The row is immediately removed from your view on the page; however, any changes you make will not take effect until you save the page

Note:

If you exit the page without saving, the row you attempted to remove will remain in the database and appear the next time you access the student record.

The table below explains the function of each of the buttons and links that may appear on the Scroll Area Navigation bar.

Button or Link	Function
	Inserts (adds) a new row.
	Deletes the current row of data.
	Displays the next row of data.
	Displays the previous row of data.
View All	Displays all rows of data on a page.
Find	Allows you to find a specific row of data.
First	Moves to the first row of data.
Last	Moves to the last row of data.

10 Opening a New Window

There may be times when it would be handy to have multiple SIS windows open at the same time. If you are working in a page and want to open another page, you can click the New Window link. This opens up the same page in another browser window. This is convenient if you want to work in another page without saving or canceling the component in which you are working.

Select the New Window hyperlink to open another window.

The screenshot shows the MyPACK EP890UPG web application interface. At the top, there is a navigation bar with 'MY PACK' and 'EP890UPG' logos, and a search box labeled 'myLinks:'. Below the navigation bar, there are tabs for 'MyPACK HOME', 'FOR FACULTY & STAFF', 'FOR STUDENTS', and 'MY TAB'. The main content area displays student information for 'Juliane Kolich' (ID: 000000003). The 'Academic Career' is 'Undergraduate'. The 'Academic Institution' is 'NCSU1' (NC State University). The 'Term' is '2071' (Spring '07 Semester). The 'Activation Date' is '01/12/2007'. The 'Student Career Nbr.' is '0' (Physical & Math Sciences). The 'Academic Year' is '2006'. The 'Load Determination' is 'Units'. The 'Form of Study' is 'Enrollment'. The 'Academic Level - Projected' is 'Freshman'. The 'Academic Level - Term Start' is 'Freshman'. The 'Academic Level - Term End' is 'Freshman'. The 'Academic Load' is 'No Units'. The 'Billing Career' is 'UGRC'. The 'Level Determination' is 'Units'. The 'Eligible To Enroll' checkbox is unchecked. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'. A red circle highlights the 'New Window' link in the top right corner of the page.

When New Window is selected, another browser window opens in the SIS application. The new window displays a copy of the page you were using. From there, another menu item, sub-menu, or page may be selected.

Note:

Although there is no limit to the number of windows you may have open, it is best to close additional windows.

11 Favorites

Favorites may be set up within the SIS application, to allow you to easily access the pages you use most often, avoiding excessive navigation. Within the SIS application, the drop down menu item labeled myLinks allows you to save specific page links that you frequently access. It is important to save hyperlinks within SIS in the myLinks dropdown menu on the portal menu because if you save these links in your web browser, they will not open unless you've already signed in to the secure site

Access the SIS page that you want to save in myLinks.

Choose the Add to My Links option from the dropdown menu.

NC STATE UNIVERSITY Find People Libraries News Calendar Campus Maps myPack Home Sign Out search ncsu.edu

MYPACK Add to My Links Go

PORTAL HOME FOR FACULTY & STAFF MY TAB

New Window | Help | Customize Page

Addresses

Susan Tuckey 00000040

Current Addresses Customize | Find | View All | First 1 of 1 Last

Address Type	Address	Effective Date	Status	Edit/View Address Detail
Home/Mailing	123 My Street Test, NC 27502 Wake	11/15/2005	Active	Edit/View Address Detail

Add Address Add Address Types

Effective Date: 03/23/2007 Status: Active

Country: USA United States

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

Submit Reset

Home/Mailing
Permanent/Parent
Physical
Campus Housing
Diploma

* Active address exists
[Explain](#)

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

Select Go (in the upper right hand corner of the page).

When the Add to My Links page opens, enter a description for the favorite.

NC STATE UNIVERSITY Find People Libraries News Calendar Campus Maps myPack Home Sign Out search ncsu.edu

MYPACK myLinks: Go

PORTAL HOME FOR FACULTY & STAFF MY TAB

New Window | Customize Page

Add to My Links

A link to the following item will be added to your "My Links" dropdown list. Properties of this entry or any "My Links" entry can be updated by selecting "Edit My Links" from the "My Links" list.

Name: Addresses

Save Cancel

Click Save.

11.1 Editing Favorites

After you've created a favorite in SIS, you may edit your favorites. You may change a favorite name or change the sequence of the favorites you have created.

Select Edit My Links from the myLinks drop down menu.

Click Go.

NC STATE UNIVERSITY Find People Libraries News Calendar Campus Maps myPack Home Sign Out search ncsu.edu

MYPACK Edit My Links Go

OPEN MENU PORTAL HOME FOR FACULTY & STAFF MY TAB New Window Help

Addresses

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

Find an Existing Value

ID: begins with []

Campus ID: begins with []

National ID: begins with []

Last Name: begins with []

First Name: begins with []

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

You will be directed to the Edit My Links page where you can make your changes.

NC STATE UNIVERSITY Find People Libraries News Calendar Campus Maps myPack Home Sign Out search ncsu.edu

MYPACK myLinks: Go

COLLAPSE MENU PORTAL HOME FOR FACULTY & STAFF MY TAB New Window Customize Page

Edit My Links

"My Links" allow you to access your favorite pages from any computer at any time. You can use this page to create, edit and organize your links. Changes made to your links list will be reflected in the "My Links" dropdown list.

Left | Right

My Links [Add Link] [Add Folder] [Add Other]

- [Addresses]
- [Submit Grades]