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Student Records for Department & College Users
## Record of Changes

<table>
<thead>
<tr>
<th>Version #</th>
<th>Date</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>03/01/2010</td>
<td>Original</td>
</tr>
<tr>
<td>2.0</td>
<td>09/17/2010</td>
<td>Added Normal Maintenance, Swap, Related Sections, additional Wait List Management, Class Roster, and Getting Class Numbers; added information on changes to repeat warnings; moved Academic History Report and Enrollment Request Search to Appendices; Removed Student Center overview; added an Index.</td>
</tr>
<tr>
<td>3.0</td>
<td>08/01/2012</td>
<td>Changed classes for exercise and made changes to Appendix A to match Analytics Upgrade.</td>
</tr>
<tr>
<td>3.2</td>
<td>05/01/2015</td>
<td>Updated branding (fonts and logo)</td>
</tr>
</tbody>
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Introduction
This workshop is for users in academic departments and administrative offices who will be using UAccess Student to access student information and to manage student enrollments. This workshop is required in order to be granted access to enrollment functions in UAccess Student.

You will learn how to use the Student Services Center in UAccess Student to access a range of information about a student's enrollment and academic history.

In addition, you will learn how to use Quick Enroll to manage a student's enrollment, including drops, adds, swaps, and overrides. You will also manage Wait Lists and Permission Lists.

Agenda
- Introduction
- Navigating the Student Services Center for Academics
- Enrolling a Student, the Basics
- Managing Wait Lists
- Swapping a Student Between Classes
- Using Permission Lists to Manage Enrollment

Objectives
- Access Program and Plan history through the Student Services Center
- Enroll students for classes
- Manage overrides for enrollment
- Drop and Swap student enrollments
- Manage Wait Lists
- Use Permission Lists to manage enrollment

Resources
- Office of the Registrar
  - registrar.arizona.edu
- UAccess Community
  - community.uaccess.arizona.edu
  - Join the group for Student: Student Records
- 24.7 IT Support Center
  - 247.arizona.edu
- UITS Workshops and Training Team
  - uits.arizona.edu/workshops
Student Services Center

The Student Services Center is your one-stop-shopping spot for information about a student's record.

Use Student Services Center to see a student's Student Center almost as she or he sees it. For more details on how the Student Center works, you can access a Practice Area where users can simulate being in Student Center and navigating the various functions, components, and information.

In addition, you can navigate to much of the information you will need to do your job and to enroll students from the Student Services Center. The Student Services Center collects data from a variety of components in UAccess Student and brings all of that data to one place. It allows you to both see information at a glance and drill down on it when necessary.

For a more detailed introduction to the Student Services Center, review the Fundamentals content for UAccess Student.

*Note: Many of the elements viewed through Student Services Center can also be viewed by navigating to the specific components through the left-hand navigation menu in UAccess Student.*

Viewing Career/Program/Plan Info on the Academics Tab

Procedure

If you are working with students to manage their enrollment, you'll get a lot of mileage out of the academics tab of the Student Services Center.

You can use it to view Career, Program, Plan, Sub-Plan, and Term information, including history, grades, and GPA. You can drill down on those elements for more information, and you can navigate from this screen to enroll a student for classes.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Essentially, if you need to look up or do anything related to a specific student's enrollment, the academics tab is a great place to start.  
Click the Academics tab. |

| academics |
### Step 2

In the Fundamentals tutorials you reviewed how to read the Institution/Career/Program and Plan information on the **academics** tab.

Remember that the Careers and Programs are listed on the left side of the screen. Details for the specific Program you have highlighted appear on the right.
### Step 3

The **Status** area shows you whether the student is Active in the Program and what the date was of the last change to the Program (Major change, Degree Check request, etc.).
4. The Plan area will show you the student's current Plan(s) (Major and Minor) and Sub-Plan(s) (Options or Concentrations).

You can use the codes of the Plans to identify Majors and Minors. A Major will have `BA` or `BS` in the code. Here, you see `GEOSBS`, which includes a `BS`. A Minor will have `MIN` in the code, such as `HISTMINU` for an undergraduate History Minor.

5. The Requirement Term is the same as Catalog Year. It indicates which Catalog’s requirements the student needs to meet in order to graduate.

6. If you want to see the history of the student’s Program and Plan changes, you will need to drill down a little further.

Click the Edit Program Data button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 7.   | The **edit program data** button brings you to the **Student Program/Plan** component.  

The **Student Program** tab gives you basic information about the student's Program in a specific Career.  

Most of the information you see here is information that was already available in the Student Services Center. The main difference is that you can view a history of changes to the student’s Program and Plan.  

You could, if you wished, also navigate to this component via **Records and Enrollment > Career and Program Information > Student Program/Plan.** |
| 8.   | Note that you have launched the Student Program/Plan for the Career that you had highlighted on the **academic** tab. In this case, the Undergraduate Career.  

If you wanted to view a different Career, you would need to return to the Student Services Center and highlight the Career that you wanted to view. |
9. The **Effective Date** is the date you saw in the Student Services Center Status field. It is the date of the last change to the student’s Program and Plan.

10. The **Program Action** field shows you what category of change was made on that date.

Some of the values you may see include *Program Change* (a switch between Colleges or from Non-Degree Seeking to Degree Seeking), *Plan Change* (a change in Major or Minor), and *Data Change* (an application for Degree Check or awarding of a Degree).

**Note:** The word *Conversion* in the **Action Reason** field simply indicates that this information was originally entered in the old system, SIS, and was electronically transferred to UAccess Student.
11. **Note:** There will usually be multiple records to view. Use the arrows to navigate between records. The record for the most recent change will show first. The Matriculation record will usually be the last record in the stack.

12. Click the Student Plan tab.

   [Student Plan]
Step | Action
--- | ---
13. | The **Student Plan** tab will allow you to see the history of changes to the student's Plan.

Note that the key information from the **Student Program** tab is carried over into the top area of this tab.

14. | If the student has multiple Plans, you will also see multiple records in the lower paler blue bar. You can use **View All** in the lower bar to see those multiple Plans if they are available.

Note that this tab explicitly states which Plan is a Major and which Plan is a Minor.

15. | Click the **Student Sub-Plan** tab.

**Student Sub-Plan**

16. | The **Student Sub-Plan** tab allows you to see details about any Sub-Plans (options) the student has.

Note, however, that it also reproduces the most important information from the **Student Program** and **Student Plan** tabs. In other words, you may be best served by jumping straight to the **Student Sub-Plan** tab, where you can see all of the details in one screen.
### Step 17

Again, there may be multiple records available. Use the top, dark blue bar (1) to navigate between records within this Career; the middle bar (2) to navigate between (or View All) Plans; and the lowest, palest bar (3) to navigate between (or View All) Sub-Plans.

### Step 18

When you want to look at that history, simply use the arrows to navigate through the records.

**Click the Show next row button.**

![Image of UAccess Student interface](image)
Step | Action
--- | ---
19. | Here, you can see that the student Matriculated as a Science Education Major with an Earth Sciences Sub-Plan before changing her major to Geosciences.

Click the **First** link.

20. | Almost everything you might want from this component is available through Student Sub-Plan. However, Student Degree contains a few details you will want to check on.

Click the **Student Degrees** tab.
21. On the **Student Degrees** tab, you will see any Degrees that have been applied for or awarded for that Career.

If no Degree has been awarded, the **Degree Checkout Stat** area will be blank, as it is here.

Otherwise, you may see **Applied** or **Awarded** in that field. None of the other fields will be filled out.

22. When you are done with this detailed view of the student's Program and Plan and are ready to return to the Student Services Center, click **Cancel** at the bottom of the screen to return.

Click the **Cancel** button.

23. If you wanted to use the **edit program data** button to access information for a different Career, you would simply highlight a Program within that Career on the **academics** tab and then click **edit program data**.

24. That's it for viewing the Career, Program, and Plan information!

**End of Procedure.**
Viewing Term Information and Updating Enrollment Limits

Procedure

In the **Term Summary** section of the academic tab, you can access current and historical information about a student's classes, grades, and GPA.

You may also, if you are a College-level user, be able to edit the student's Enrollment Limits.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>You will need to scroll down to see all of the Term Summary information. Release the mouse button.</td>
</tr>
</tbody>
</table>
2. The Term records are in reverse chronological order. You may see a current, future, or past term as the first in the list. Whichever you see, it is the last Term that the student has been Term Activated for. On the right side of the screen, you see her details for that Term.

3. Click on the current Term’s link.
4. Now, you’re looking at the current Term for this student, so you can see Classes and...

Click the scrollbar.
Step | Action
--- | ---
5. | ...statistics for the Term to date, plus cumulative stats.
   | Click the scrollbar.
6. | Click an older Term link.
Step | Action
--- | ---
7. | Now that you're looking at a historical Term, you can see Classes, complete with Units, Grading, and Grades...

Click the scrollbar.
8. ...and what the **Statistics** were as of the end of the Term you are viewing.

Click the scrollbar.
9. If a student withdraws from the UA during a term, you will see an additional section in Term Summary labeled Withdrawal/Cancel.

That section will contain the date of the withdrawal, the reason (P for Personal or H for Health), and the percent of refund due.

10. You can drill down further into the student’s Term information.

*Note: Which Term you see when you click this button depends on which term you have highlighted on the left side of the screen. However, you will be able to navigate between terms within the component after you drill down.*

Click the **Edit Term Data** button.
### Step 11

Clicking **edit term data** launches the **Term Activate a Student** component, which you could also have accessed through the menu pagelet at **Records and Enrollment > Student Term Information > Term Activate a Student**.

### Step 12

You are currently looking at Term data for Fall 2009 because that's the Term you had highlighted when you clicked the **edit term data** button.

But you can navigate to other terms.

Click the **First** link.
Training Guide
Student Records

Step | Action
--- | ---
13. | The first record is, again, the last Term for which the student was Term Activated. If that’s a future Term and you want to see information for the current Term, you would want to look at the second record.

14. | Much of the information on the Term Activation tab is replicated in the Term Summary area of the academics tab, so you’ve already seen it.

Click the Enrollment Limit tab.

15. | Depending on your access level, you may have the ability to actually make some changes on the Enrollment Limit tab.

You may, as a College-level user, be able to override the unit limits on the student’s enrollment for that Term. If you do not have this capability, you will simply not be able to check the box.

Click the Override Unit Limits option.
### Step 16

After you've checked the **Override Unit Limits** box, the Units fields become editable, and you can modify them for this student for this term.

You can type the desired information into the **Max Total Units** field. Type a valid value, such as "21."  

### Step 17

The rest of the tabs on this screen are relatively rarely used, but let's take a very quick tour...  

Click the **Student Session** tab.  

**Student Session**
18. **Student Session** simply tells you which academic session a student is enrolled in and what their **Academic Load** is for that session.

Each Term has corresponding Sessions. Fall and Spring Terms are typically fairly straightforward: each Term is associated with a **Regular Academic Session**. Summer Term, on the other hand, has three Sessions routinely associated with it.

19. For Summer Terms, you will be able to look at the **Student Session** tab to see what the student's Academic Load is for each of the Summer Term Sessions (Presession, Summer 5 Week One, or Summer 5 Week Two).

20. The **Terms in Residence** and **Term Control Dates** tabs don't have anything that you are likely to find useful on them.

Click the **External Study** tab.
21. **External Study** may be populated with information if the student is studying abroad or at a different institution that Term, including any study abroad agreements.

You made changes in this component earlier (in **Enrollment Limits**), so you'll want to click **OK** to save those changes.

Click the **OK** button.
22. Note that even though we navigated to the most recent active Term within the Term Data component, we are still looking at the Term we highlighted earlier in the Student Services Center.

Click the upcoming Term link.

23. The student still isn't enrolled for any classes for that Term.

Let's take a look at a little more information on the academics tab. Then, you'll be ready to start helping the student enroll.

End of Procedure.
Viewing Term History and Term Statistics

Procedure

The Term History link at the bottom of the page launches the Term History component, which gives you information that you actually can see from the academics tab. But let's take a quick look at it regardless.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the scrollbar.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the Term History link.</td>
</tr>
</tbody>
</table>
### Step 3

3. The **Term Details** link launches the **Term History** component.

You could also have accessed this information by using the menu pagelet to go to **Records and Enrollment > Student Term Information > Term History**.

### Step 4

4. Make sure that, if the student has multiple Academic Careers at the UA, you pay attention to which Academic Career you are looking at.

### Step 5

5. The **Term Statistics** tab shows you statistics only for a specific Term.

   **Note:** There are multiple records within the Undergraduate career. You could use the **next arrow** or the **View All** button to navigate to the appropriate term.

   Click the **Show next row** button.

### Step 6

6. Click the **Show next row** button.

### Step 7

7. Click the **Cumulative Statistics** tab.

   ![Cumulative Statistics](image-url)
### Step 8
The **Cumulative Statistics** tab shows you the student's GPA and Units to date rather than just those for the specific Term.

Note that you are still looking at the Term you selected on the previous tab.

### Step 9
The rest of the tabs either show information that was already shown in the Student Services Center or are not used at the UA.

Click the **Cancel** button.

### Step 10
That's it for the Term History.

Again, most of that information was already available to you on the **academics** tab. So it's really up to you how you prefer to view it!

**End of Procedure.**
Student Enrollment: The Basics

This section introduces the basics of enrolling a student and dropping a student from a class.

Viewing Student Enrollment Appointments

Procedure

The Student Enrollment Appointment component allows you to see when a student is scheduled for registration.

Note: Appointment simply refers to the period of time during which the student is eligible to enroll. It does not mean that the student has to meet face-to-face with anyone.

You can find it under Records and Enrollment > Term Processing > Appointments > Student Enrollment Appointment in the menu pagelet or you can access it through the Quick Enrollment link on the academics tab or from the Student Center tab.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The <strong>Quick Enrollment</strong> link will launch the <strong>Quick Enroll</strong> component, which can also be found at <strong>Records and Enrollment &gt; Enroll Students &gt; Quick Enroll a Student</strong>. Click the <strong>Quick Enrollment</strong> link.</td>
</tr>
</tbody>
</table>

![Quick Enrollment](image-url)
## Step 2
You will spend some time with the rest of Quick Enroll component in a later lesson.

Right now, the first thing you want to do is check when the student is eligible to enroll.

Click the **Enrollment Appointments** link.

---

### UAccess Student

#### Student Enrollment Appointment

- **Academic Career**: Undergraduate
- **Term**: Fall 2014
- **Enrollment Appointments**

#### Enrollment Appointments

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>First Appointment</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00 PM</td>
<td>2:00 PM</td>
<td>12:00 PM</td>
</tr>
</tbody>
</table>

**Note**: The Enrollment Appointment shown here is not representative of real Enrollment Appointments. It was built specifically for training.

---

## Step 3
The **Enrollment Appointment** screen shows you when the student is eligible to begin enrolling for classes.

The student must register during that window or wait until open registration.

**Note**: The Enrollment Appointment shown here is not representative of real Enrollment Appointments. It was built specifically for training.

## Step 4
To return from the **Enrollment Appointment** screen, you will need to use the Back button on your browser.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Once you know the student's enrollment appointment, you can move on to enrolling the student for classes.</td>
</tr>
</tbody>
</table>

**End of Procedure.**
Viewing a Student's Study List

Procedure

The Study List is the student's schedule. You can view and print it from the Quick Enrollment screen.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Study List</strong> link.</td>
</tr>
</tbody>
</table>

![Quick Enrollment Screen](Image)
2. Here, you can see the class that this student is currently waitlisted for.

You could use the **Printer Friendly Page** link to print a version of the student's Study List.

Remember to collapse the menu pagelet before you print.

3. You can drill down on a class's details by clicking on any of the class links.

4. You can also view the Academic Calendar as it applies to this class from the **calendar** icon.

Click the **Cancel** button.

5. That's all it takes to view a Study List.

**End of Procedure.**
Enrolling a Student Using Quick Enroll

Procedure

Quick Enroll is, as you might imagine, the quick way to enroll students for classes.

From this screen, you can add and drop a student from classes, edit a student’s enrollment, and manage wait lists.

You can also, depending on your access, override various restrictions that are specific to the student or the class.

This time, you got here from the academics tab of the Student Services Center. You could also get to Quick Enrollment by using the navigation menu to go to Records and Enrollment > Enroll Students > Quick Enroll a Student. You will have a chance to do so in a later lesson.
1. When you first open a new Quick Enrollment component, the Request ID will be a string of zeros. That means that this is a brand new Enrollment Request.

Every time you make a new change to a student's enrollment, you should do so in a new Enrollment Request rather than merely updating an old one.

That means that every time you prepare to make a new change through Quick Enrollment, you should see a Request ID of zeros in the upper left corner.

2. In this first lesson, you will perform a basic enrollment for a student.

   Click the Action drop-down list.

   Enroll

3. Your first step will be to choose the specific action you want to perform in this Enrollment Request.

   In this case, you are going to stick with Enroll.
### Step 4
You will need to look up the specific class that you want to perform the action for.

**Click the Search button.**

---

### Step 5
The **Class Search** here is the same Class Search that students use to look up classes and that you can access through **Curriculum Management > Schedule of Classes > Class Search**.

**Click the Course Subject drop-down list.**

---

### Step 6
The **Course Subject** list is long, but you can shortcut to the subject that you want by typing in the first few letters of it.

You can type the desired information into the field. Type a valid value, such as “ind.”
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>Individuals &amp; Societies</strong> list item.</td>
</tr>
<tr>
<td>8.</td>
<td>If you may be enrolling students in classes that show as closed in the Schedule of Classes, make sure to uncheck the <strong>Show Open Classes Only</strong> option. Otherwise, you won't find those classes. Click the <strong>Show Open Classes Only</strong> option.</td>
</tr>
<tr>
<td>9.</td>
<td>There are multiple ways to search for a class. One is to search for it by <strong>Course Number</strong>, but let's look at some other choices. Click the <strong>Additional Search Criteria</strong> link.</td>
</tr>
<tr>
<td>10.</td>
<td>If you leave your search parameters very broad, you will get a long list of classes. You will want to narrow your search as much as possible. You can search by meeting start or end time, which can allow you to fit a student's schedule.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>11.</td>
<td>You can search for classes that meet in specific time and day ranges. Click the <strong>Mon</strong> option.</td>
</tr>
<tr>
<td>12.</td>
<td>Click the <strong>Wed</strong> option.</td>
</tr>
<tr>
<td>13.</td>
<td>You can also search by the Instructor Last Name if you are looking for a particular instructor's classes.</td>
</tr>
<tr>
<td>14.</td>
<td>The Class Number is really what you are searching for. If you had it, you wouldn't be here. Course Title Keywords can help you search by related topics.</td>
</tr>
<tr>
<td>15.</td>
<td>Minimum and Maximum Units will allow you to search for classes that, for instance, are only one unit.</td>
</tr>
</tbody>
</table>
Step 16. You can use the Course Component menu to search for only classes that contain a specific type of activity, such as Independent Study or Field Studies.
### Step 17
As you can see, you can zero in on specific Attributes of the classes you are looking for, such as **Honors** or **Writing Emphasis**.

Click the **General Education: Tier 1 Individuals & Societies** list item.

### Step 18
In most cases, you will leave Session blank. However, you will use it to zero in on which session you want out of the Summer Term or in special cases, such as College of Medicine sessions.
### Step | Action
--- | ---
19. | If you’re looking for an online class in particular, for example, you will find the **Mode of Instruction** useful.
20. | Click the scrollbar.
21. | Depending on where you work, you may also find **Campus** and **Location** useful.
22. | Click the **Search** button.
23. You will see summaries of the classes that match your search criteria. For more detail, you can click on the Section links.

Click the 001-LEC(40740) link.
24. The detail screen can give you information such as how many students are enrolled, is Department Consent required, and what prerequisites exist.

   Click the Select Class button.

25. Once you've selected the class, you will see that the Class Number field is populated and that you have a link available. Clicking that link will take you to the Class Description page that you were just on.

26. Once you've selected the class you want, click the Submit button to record your choices.

   Click the Submit button.
Step | Action
--- | ---
27. | After you Submit, your Request is saved.

A couple of things happen: a **Request ID** is assigned, and the system identifies whether the attempted enrollment broke any system rules.

In this case, no broken rules. Instead, **Success!**

(You'll see an example with some broken rules a little later on.)

28. | If you need to perform additional enrollment actions for the student, you can click the **plus sign** icon to add a row to this Request.

There's nothing wrong with performing multiple actions within a single Request as long as you perform all that actions during the same session. If you save and then navigate away from this screen, you would want to add a new Request for any additional changes.

29. | Successfully submitting your Enrollment Request enrolled the student in the class.

**Note:** You must click **Submit** in order for the enrollment action to be processed.

30. | Click the **Student Services Center** link.

31. | Click the scrollbar.
32. As you can see from the Student Services Center, you've successfully enrolled a student in an INDV class.

33. The next lessons will cover special circumstances in using Quick Enrollment.

End of Procedure.
Enrolling a Student for a Class with a Changed Grade Base

Procedure

Some classes allow you to change the grade base. In this lesson, you will enroll a student for a class and change its grade basis.

In addition, many classes are configured to require department consent to allow a student to enroll. You may have the ability to grant that consent for your department. In this lesson, you will do so.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Quick Enrollment</strong> link.</td>
</tr>
</tbody>
</table>

[Quick Enrollment]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Note that the <strong>Request ID</strong> is all zeros: you have started a new Request.</td>
</tr>
<tr>
<td>3.</td>
<td>If you know the <strong>Class Number</strong> for the Class that you want to enroll the student in, you can simply type that number instead of searching for it in the Schedule of Classes. You can type the desired information into the <strong>Class Nbr</strong> field. Type a valid value, such as “34442.”</td>
</tr>
<tr>
<td>4.</td>
<td>Once you move out of the <strong>Class Nbr</strong> field, the system will find the class based on the number that you entered. Press [Tab].</td>
</tr>
</tbody>
</table>
5. If you want to confirm that you chose the right class, you can click on the class link and view a detailed class description.

6. To modify the Grade Base, you'll navigate to the **Units and Grade** tab.

Click the **Units and Grade** tab.
7. You will only be able to change the Grade Base if the course is defined in the Course Catalog to allow for alternate grading.

Click the **Look up Grade Base** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 8.   | You'll see whatever Grade Base options are available for the class.  

Click the **Elective Pass/Fail** link.  
[Elective Pass/Fail](#) |
| 9.   | Click the **Submit** button.  

[Submit](#) |
Step | Action
--- | ---
10. | Sometimes, when you submit the enrollment, the system will identify errors that need to be corrected.

If you see *Errors* here, the student is **NOT** enrolled in the class. You must correct any errors and Submit again for the student to be enrolled.

Click the **Errors** link.
### Step 11
In this case, the error tells you that Department Consent is required for the student to enroll in the class.

Click the **Return** button.

### Step 12
There are two overrides tabs.

**General Overrides** contains those overrides that are specific to the student, such as a need to override her Enrollment Appointment or a need to override the Prerequisite requirement for her.

**Class Overrides** are specific to the class, such as Department Consent or overriding a Closed Class.

The Department Consent override is on the **Class Overrides** tab.

Click the **Class Overrides** tab.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>To grant Department Consent, you give the student permission to take the class. Click the <strong>Class Permission</strong> option.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>14.</td>
<td>Click the Submit button.</td>
</tr>
</tbody>
</table>
15. Ack! Still no Success message! This time, however, the **Errors** are cleared.

**Messages** indicate that the **student is enrolled for the class**, but there's something you should know.

Click the **Messages** link.
16. In this case, the system is telling you that the student has already taken the class. She has exceeded the available repeats. You should investigate a different class for her if she is interested in getting credit for the class.

**Note:** You will get an Error if the enrollment violates the repeat policy. You will not be able to enroll the student yourself. You must use the Office of the Registrar’s repeat workflow to petition for permission to repeat. You can find more information on that workflow on the Registrar’s website: [http://registrar.arizona.edu/regtrans/request-for-exception](http://registrar.arizona.edu/regtrans/request-for-exception).

Click the **Return** button.

17. Let's take a look at the Student Services Center so that you can see that the student is, in fact, enrolled.

Click the **Student Services Center** link.

18. Click the scrollbar.
Step 19. You can see that the student is enrolled for SPAN 101 for Elective Pass/Fail.

You should investigate further to see whether you need to drop the student out of this class and choose a different one for her.

Step 20. That's all it takes to change the grade base for a class and grant department consent for a student to enroll.

Your ability to enroll students for specific classes and to grant overrides will depend on your security settings in the system.

End of Procedure.
Dropping a Student from a Class

Procedure

You drop a student from a class the same way you enroll them.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Quick Enrollment</strong> link.</td>
</tr>
</tbody>
</table>
| 2.   | The key is to choose the right **Action** first.  

Click the **Action** drop-down list.

- Enroll
Step 3. Click the **Drop** list item.

Step 4. The Action you choose drives how the rest of the screen behaves.

Click the **Search** button.
5. Because you chose Drop, you will only see the classes that the student is currently enrolled in.

To select a class, click the icon in front of it.

Click the Enrollment Select button.
Step 6. If you had chosen the wrong class, you could simply click the magnifying glass again and choose the right one.

Step 7. All you have left to do is to submit.

Click the **Submit** button.
Training Guide
Student Records

Step | Action
--- | ---
8. | That's it!

Click the **Study List** link.

[Study List]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Sure enough, you can see that SPAN 101 is no longer on the student's schedule. <strong>Note:</strong> <em>If the drop takes place after the Term begins, the class will show on the Study List, but the Status will be Dropped.</em>  &lt;br&gt;Click the <strong>Cancel</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>10.</td>
<td>You can, of course, also check the schedule through the Student Services Center. Click the <strong>Student Services Center</strong> link.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the scrollbar.</td>
</tr>
</tbody>
</table>
12. Sure enough, the class is gone here too.

13. That's all it takes to drop a student out of a class.

End of Procedure.
Exercises

Exercise One: Enrolling a Student for a Class with Variable Units

In this exercise you will enroll your student for another class. In this case, you will be enrolling him or her for an independent study. By default, the independent study is a one unit class; however, the student will be taking it for three units. You will need to change the units as you enroll the student.

1. Open a new Enrollment Request.
2. Enroll the student for class number _____.
3. Navigate to the Units and Grades tab.
4. Change the Units Taken to 3.
5. Submit the Enrollment Request.
6. Investigate any Errors and enter any necessary Overrides.
7. Submit again if necessary.

Exercise Two: Dropping a Student from a Class

In this exercise, you will drop your student from the ECON class that you enrolled him or her for earlier. You can use the same Enrollment Request that you used to enroll the student in Exercise One.

1. Add a row.
2. Identify the action that you want to perform and look up the class that you want to drop the student from.
3. Submit the Enrollment Request.
4. Investigate any Errors and enter any necessary Overrides.
5. Submit again if necessary.
6. Return to Student Services Center and check your work.
Enrolling for Variable Units and Modifying an Enrollment

Procedure

In this lesson, you will enroll a student for a class with variable units. You will enter multiple overrides to enroll the student.

You will also realize that you need to edit the units that you entered, and you will do so.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Quick Enrollment link. [Quick Enrollment]</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>2.</td>
<td>You're going to enroll this student for a Linguistics independent study. That course is defined in the Course Catalog as a variable units course. You can type the desired information into the <strong>Class Nbr</strong> field. Type a valid value, such as &quot;28854.&quot;</td>
</tr>
<tr>
<td>3.</td>
<td>Press [Tab].</td>
</tr>
</tbody>
</table>
Step | Action
---|---
4. | Click the **Units and Grade** tab.

**Units and Grade**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Because this course is defined to allow for variable units, the <strong>Unit Taken</strong> field is editable. You can type the desired information into the <strong>Unit Taken</strong> field. Type a valid value, such as “3.”</td>
</tr>
<tr>
<td>6.</td>
<td>You happen to know that this class requires Department Consent to enroll, and you are going to grant it before you click Submit. Click the <strong>Class Overrides</strong> tab.</td>
</tr>
<tr>
<td>7.</td>
<td>Click the <strong>Class Permission</strong> option.</td>
</tr>
</tbody>
</table>
### Step 8
Click the **Submit** button.

**Submit**

### Step 9
Let's take a look at the Study List to see how the class shows up in the student's schedule.

Click the **Study List** link.

**Study List**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the scrollbar.</td>
</tr>
</tbody>
</table>
| 11.  | You enrolled the student for three units, but you now realize that you should have enrolled her for two.  

Click the **Cancel** button.  

**Cancel** |
| 12.  | Let’s take a look at the **Units and Grades** tab to see whether it can be edited.  

Click the **Units and Grade** tab.  

**Units and Grade** |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | Notice the editable box is no longer there.  
Once the Enrollment Request has successfully been submitted, it can no longer be edited.  
However, you can edit the student’s enrollment.  
Click the **Class Enrollment** tab. |
| 14.  | To edit the enrollment, you will need another Action, which means you will need another row on which to enter the Action.  
Click the **Add** button. |
| 15.  | Click the **Action** drop-down list.  
[Enroll] |
16. To make changes to a class that the student is already enrolled in, you need *Norm Maint* (Normal Maintenance).

   Click the **Norm Maint** list item.

17. Choosing Normal Maintenance changes how the rest of the row behaves.

   Click the **Search** button.
18. You only have access to the classes the student is currently enrolled in. And you will only be able to edit classes that your department security allows you to enroll students in. In most cases, these will be classes in your department or departments.

Click the Enrollment Select button.

19. Click the Units and Grade tab.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 20.  | Now that you are in a new Action in Normal Maintenance mode, you are able to edit the **Unit Taken** field.  
You can type the desired information into the **Unit Taken** field. Type a valid value, such as "2." |
| 21.  | Because you are editing a class that the student is already enrolled in (not adding a new class), you don't need to enter any overrides.  
Click the **Submit** button. |
| 22.  | Let's take another look at the Study List.  
Click the **Study List** link. |
### Step 23
Click the scrollbar.

### Step 24
There it is! The student is now enrolled for two units.

Click the **Cancel** button.

### Step 25
You've successfully enrolled the student in a class with variable units and then modified those units.

In this case, you happened to process the enrollment and the maintenance in the same Enrollment Request. But you didn't have to. You could have entered the maintenance on a different day through a different Enrollment Request.

**End of Procedure.**
Enrolling a Student for a Class with Related Sections

Procedure

Some classes have both an Enrollment Section and Non-Enrollment, or related, Sections. If the related section is mandatory, the system will prompt you to enroll the student in one.

Step | Action
--- | ---
1. | Click the **Quick Enrollment** link.  
   **Quick Enrollment**
2. | You can type the desired information into the **Class Nbr** field. Type a valid value, such as **“3718”**.
3. | Press [Tab].
Step | Action
--- | ---
4. | Click the **Submit** button.

Submit
### Step 5

**Action**: Click the **Errors** link.
6. As you can see, the system is prompting you to choose a lab section to go with the lecture section that you have already chosen for the student.

The student isn't yet enrolled and won't be until you choose that lab.

Click the **Return** button.
Step | Action
--- | ---
7. | Click the Related 1 magnifying glass.
### Step 8

The look up screen is restricted to only the related sections that are tied to the lecture that you chose.

You can't see schedule from this screen, so you will want to know which lab you want to choose before navigating to this screen.

Click the **001G** link.

| **Related 2** field is for classes that have three components (for example, a lecture, a lab, and a discussion section). You will only use it for classes that have two distinct secondary sections. |
| For instance, **Related 1** could be for the lab section; **Related 2** could be for the discussion section. |
### Step 10

**Action:**

Click the **Submit** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 11.  | Remember, *Messages* indicates that the student is enrolled but the system has additional information about the enrollment.  
  Click the **Messages** link. |

*Messages*
### Step 12
A Requirement Designation is a special flag that is added to a student's record in association with a particular class. It's basically a flag on a course to track on the Academic Advisement Report. This one is particular to the Chemistry Department.

Click the **Return** button.

<table>
<thead>
<tr>
<th>Return</th>
</tr>
</thead>
</table>

### Step 13
Click the **Student Services Center** link.

[Student Services Center](#)

### Step 14
Click the scrollbar.
15. As you can see, the lab and lecture both show on the student’s schedule. But the lab is clearly subsidiary to the lecture.

16. That’s all it takes to enroll a student for the related section of a class.

End of Procedure.
Managing Class Rosters & Wait Lists

Viewing a Class Roster

Procedure

You can view class rosters through the **Class Roster** component in UAccess Student, through the **Class List** page in UAccess Analytics, and through the Instructor Center.

In this case, you are going to look at the option in UAccess Student. Through UAccess Student, you can get a good look at who is on the wait list in addition to who is already enrolled.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Curriculum Management</strong> link.</td>
</tr>
</tbody>
</table>

![UAccess Student](image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Class Roster</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Collapse Menu</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
4. | You can look up the class with whatever information you have. In this case, you happen to have the Class Number. You can type the desired information into the **Class Nbr** field. Type a valid value, such as “6436.”

5. | Click the **Search** button.
6. As you can see, the default view is of the students who are currently enrolled.

   Click the **Enrollment Status** drop-down list.

   ![Enrolled dropdown list]

7. You can, however, switch to view only students on the Wait List or both waiting and enrolled students.

   Click the **Waiting** list item.

   ![Waiting list item]
8. We'll be using this class as an example for managing Wait Lists, so it's an extreme example: one student enrolled and 23 on the Wait List.

The default sort order on this screen is in the order that the students are on the Wait List (see the Status Note column). However, you can sort it by other columns.

Click the Level column header.

**Level**

9. The list in now sorted alphabetically by Academic Level. The Freshmen sort to the top, but note the Sophomores appear--alphabetically--after the Seniors. However, the grouping does allow you to see at a glance who is in which Level.

You could use that grouping to decide that the Seniors, for instance, have first priority to be enrolled in the class.

Click the Program and Plan column header.

**Program and Plan**

10. The list is now sorted alphabetically by College and Major (Program and Plan), which can also help you decide which students to enroll in the class.

A second click on the column header will sort the list in descending order.
11. You can also drill down from the Class Roster to the Class Detail page.

Click the Class Detail button.
Step | Action
--- | ---
12. | This is the familiar Class Detail page that you can access from many locations in UAccess Student. As always, you can use it to view instructor and room info, enrollment totals, and other details about the class.
13. | Click the **Return to Class Roster** link.
14. | That’s the class roster in UAccess Student. Note that the class rosters in the Instructor Center and in UAccess Analytics both allow you to contact the students directly from the roster itself.

**End of Procedure.**
Enrolling a Student from a Wait List

Procedure

Once priority registration begins for a term, a nightly process is run that identifies classes with students on the waitlist and any available seats in the class. If there are open seats, the system begins at Wait List Position 1 and works down the list until it identifies the student that qualifies to be enrolled in the class. The enrollment is automatically done and the student received an email detailing the enrollment.

If a student is on the waitlist but not enrolled, due to a time conflict, not meeting requirements, etc., that student receives an email detailing the enrollment that did not qualify and why.
Changing a Student's Wait List Position

**Procedure**

Only administrative users can enroll a student from a Wait List. Students can't do it themselves. So you don’t necessarily have to adjust student's Wait List positions. But you may want to.

1) Students can see their Wait List position through the Student Center, so you may want to give them a realistic sense of where they stand.
2) Adjusting their position can help you keep track of who has priority to get into the class.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Like everything else you've done so far with enrollment, you manage Wait Lists through Quick Enrollment. Click the <strong>Quick Enrollment</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Your Action needs to be specific to what you want to accomplish. Click the <strong>Action</strong> drop-down list. Enter Enroll.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>3.</td>
<td><strong>Chg WL Pos</strong> (Change Wait List Position) will allow you to move the student up or down on the Wait List. &lt;br&gt;Click the <strong>Chg WL Pos</strong> list item.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>5.</td>
<td>You will only see classes the student is enrolled in or Wait Listed for. &lt;br&gt;Click the <strong>Enrollment Select</strong> button.</td>
</tr>
</tbody>
</table>
Step 6. You can check from Quick Enrollment to see where the student is on the Wait List.

Click the Class Overrides tab.

Class Overrides
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>WaitList Pos</strong> link.</td>
</tr>
</tbody>
</table>

**WaitList Pos**
### Training Guide

#### Student Records

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click the OK button.</td>
</tr>
</tbody>
</table>

**Step**

**Action**

8. Click the OK button.

---

**Quick Enrollment**

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Undergrad</th>
<th>Institution</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000010000</td>
<td>Undergrad</td>
<td>UA</td>
<td>Fall 2013</td>
</tr>
</tbody>
</table>

**Class Enrollment**

<table>
<thead>
<tr>
<th>Closed</th>
<th>Class Links</th>
<th>Class Links</th>
<th>Graduated</th>
<th>Class</th>
<th>Dynamic</th>
<th>Wait List</th>
<th>Other</th>
<th>Work List</th>
<th>Pass</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Other Class Info**

9. Now, you're ready to move her up to the number one spot.

Click the **Other Class Info** tab.

**Other Class Info**
**Step** | **Action**
---|---
10. | You can type the desired information into the **WL Pos** field. Type a valid value, such as “1.”
11. | Click the **Submit** button.
Step | Action
--- | ---
12. | That did it! Let's check the Wait List position.

Click the **Class Overrides** tab.
### Step 13

**Action**

Click the **WaitList Pos** link.

[WaitList Pos]
Step | Action
---|---
14. | Sure enough, she's now first on the list.

    Click the **OK** button.

    ![](OK_button.png)

15. | That's all it takes to adjust a student's position on a Wait List. Again, remember that students can't enroll themselves from the Wait List. You will need to do it. But adjusting their position can help them--and you--know where they stand.

    **End of Procedure.**
Switching a Student Between Classes/Related Sections

Swapping a Student Between Classes

Procedure

When you need to, you can perform a simultaneous add-drop, also known as a Swap.

You might want to use this tool to save yourself steps when you need to drop a student out of a class in your department and add them to another. You might also do this when you want to make sure that the drop only processes if the add is successful.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Quick Enrollment</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Action</strong> drop-down list.</td>
</tr>
</tbody>
</table>

![Quick Enrollment](image-url)
Training Guide
Student Records

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | Your **Action** in this case, is **Swap**.  
Click the **Swap** list item. |
| 4.   | Note that you now have two fields for class numbers. The first is for the class you want to drop.  
Click the **Class Nbr** magnifying glass. |

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5.   | In this case, you are going to switch the student between different offerings of English 209.  
Click the **Enrollment Select** button. |
Step | Action
--- | ---
6. | **The Change To** field is for the class you are enrolling the student in. Knowing the Class Number for that class will make your life easier.

In this case, you are going to enroll the student in a different section of ENGL 209, but you could enroll them in any class you have enrollment access to.

You can type the desired information into the **Change To** field. Type a valid value, such as “6439.”

7. | Press **[Tab]**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 8.   | Because ENGL 209 requires Department Consent to enroll, you will need to go ahead and grant that override.  
      | Click the **Class Overrides** tab. |
|      | **Class Overrides** |
| 9.   | Click the **Class Permission** option. |
### Step 10
Click the **Submit** button.

**Submit**

### Step 11
Done! Let's check the Study List.

Click the **Study List** link.

**Study List**

### Step 12
Click the scrollbar.
### Step 13

13. **Action**

   There it is. The student is now enrolled in the new section of ENGL 209. If for some reason the student could not be enrolled in the new class, the student would not have been dropped out of the old class.

   Click the **Cancel** button.

   ![Image of UAccess Student interface showing student records](image_url)

### Step 14

14. **Action**

   You have administratively swapped the student between classes.

   Students can also swap themselves through the Student Center. In that case, swapping is very useful, as it keeps them from getting stuck if the class they are trying to get into fills while they are dropping the old one.

   **End of Procedure.**
Using Swap to Switch Related Sections

Procedure

You can also use Swap to switch a student between the Related Sections of a class.

Earlier, you enrolled the student in CHEM 151, which is a Lecture with a required Lab. If you want to switch which Lab the student is enrolled in, you use Swap to do so.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Note that the student is currently enrolled in CHEM 151 001G as her Lab section. You want to switch her to 001F. Click the Quick Enrollment link. [Quick Enrollment]</td>
</tr>
<tr>
<td>2.</td>
<td>Click the Action drop-down list. <strong>Enroll</strong></td>
</tr>
</tbody>
</table>
### Step 3
Click the **Swap** list item.

#### Action

**Swap**

---

### Step 4
When you are switching the student between related sections of a class, you are going to enter the Enrollment section of the class in *both* the **Class Nbr** (class to drop) and **Change To** (class to add) fields.

Click the **Class Nbr** magnifying glass.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Click the <strong>Enrollment Select</strong> button.</td>
</tr>
<tr>
<td>6.</td>
<td>You can type the desired information into the <strong>Change To</strong> field. Type a valid value, such as “3718.”</td>
</tr>
<tr>
<td>7.</td>
<td>Press [Tab].</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
8. | Note that you have entered the same Class Number in both of the fields. Now, you can choose the Related Section (in this case, the Lab) that you want to move the student into.

*Note: Only enter the code for the Related section that you are adding the student to. You do not need to enter the Related section that you are dropping the student out of. The system automatically drops the Related section that the student is currently in.*

Click the Related 1 magnifying glass.
Step | Action
--- | ---
9. | Click the **001F** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>Submit</strong> button.</td>
</tr>
<tr>
<td>11.</td>
<td>That's it! You've switched the student from one lab (001G) to another (001F). Click the <strong>Study List</strong> link.</td>
</tr>
</tbody>
</table>

---

### Training Guide
**Student Records**

---
Step | Action
--- | ---
12. | As you can see, the student is now enrolled in CHEM 151 001F.
    | Click the scrollbar.
13. | Click the Cancel button.
14. | Swap is very handy when you want to switch a student between Related Sections (Non-Enrollment Sections) of a class with a minimum of fuss.
    | End of Procedure.
Permission Lists

Creating a Permission List

Procedure

You can restrict enrollment in your classes in several ways, including by keeping the class closed, by requiring Department Consent to enroll, and by enforcing Prerequisites.

When you decide to allow students into a restricted class, you can enroll each of them manually. Or, you can create a list of specific students who are allowed to enroll themselves for the class.

If a student is on the Class Permission list, he will be able to enroll himself. Students who aren't on the list won't be able to enroll.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>You can find Class Permission lists under Records and Enrollment &gt; Term Processing &gt; Class Permissions &gt; Class Permissions. You'll need to look up the class for which you are interested in looking at the Permission List. You can type the desired information into the Subject Area field. Type a valid value, such as “span.”</td>
</tr>
<tr>
<td>2.</td>
<td>You can type the desired information into the Catalog Nbr field. Type a valid value, such as “102.”</td>
</tr>
<tr>
<td>3.</td>
<td>Click the Search button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
4. | The Class Permission page has listings for every section of a class. You will build a Permission List for each section separately.

   In this case, note that you are looking at the first of 9 records, which happens to be SPAN 102-001. To grant permissions for a different class section, you would need to navigate to that record.

5. | The **Defaults** area includes the various types of permissions that you can grant to the students you are adding to the list.

   The boxes you check here in **Defaults** will be checked for any students you then add to the list. You can edit those permissions on a student-by-student basis if you need to.

   In this case, you are going to grant the students on the list Department Consent to enroll themselves in the class.

   **Click the Consent Required option.**
### Training Guide

**Student Records**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| **6.** | You add students in the Class Permission Data. The easiest way to add students is to have their student IDs available, whether those IDs are in an Excel spreadsheet or some other document.  
Once you have those IDs, you can simply paste them into the ID field to add the students to the Class Permission list. |
| **7.** | In this case, you have already copied an ID from an Excel spreadsheet, and you are ready to paste it in.  
Press [Ctrl+V]. |

![UAccess Student](image)

**Step**

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
</table>
| **8.** | There's the ID. Once you either click the [tab] key on your keyboard or click the Add button, the student’s name will be populated.  
Click the Add button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>You've added the student to the Class Permission list. The Defaults that you set up have also populated her Permission tab. But you'll take a look at those in a moment. For now, let's add another student.</td>
</tr>
<tr>
<td>10.</td>
<td>Once again, you have already copied the student ID from an Excel spreadsheet. Press [Ctrl+V].</td>
</tr>
<tr>
<td>11.</td>
<td>The Permission Use Date and Status columns show when and whether the student used the Permission. Click the Add button.</td>
</tr>
<tr>
<td>12.</td>
<td>You have one more student to add. Press [Ctrl+V].</td>
</tr>
</tbody>
</table>
### Step 13

Note that the Permission has an **Expiration Date**. If the student has not used the Permission by that date, she will no longer be able to unless you click the **Permission Time Period** box on the **Permission** tab.

Click the **Add a new row** button.

### Step 14

Now that you’ve added the three students you plan to add for the moment, let’s take a look at the Permissions that you have assigned those students.

Click the **Permission** tab.
Step 15. As you can see, all the students that you added inherited the Consent Required permission from the Defaults. If you wanted to grant one of those students permission for Requisites Not Met, all you would have to do is check that box in that student's row.

Note: Make sure that you check your Defaults every time you open the Class Permission list to edit it. The Defaults will always be blank when you first open the list.

Step 16. Click the Comments tab.
Step | Action
--- | ---
17. | Comments are useful to record why you added the student to the list. In this case, you have copied the "Per Instructor 10/1/10" comment and are going to paste it in the rest of the rows. Press [Ctrl+V].
18. | Press [Ctrl+V].
19. | Click the scrollbar.
20. Now you have added the students to the Class Permission list. When you click Save, those students—and only those students—will be able to enroll themselves for this class without you or anyone else needing to be involved.

   Click the **Save** button.

21. Remember that you have added the students to the Class Permission List for this section only. If you want to grant them permission to choose between several sections, you will need to add them to the Class Permission lists for those sections as well.

   Click the **Show next row** button.
### Step 22

Now that you’re looking at section 002, you would go through the same steps to set up this Class Permission list.

Click the **Consent Required** option.

![Class Permission List](image)

### Step 23

There’s no question that there is some work involved in setting up Class Permission lists. There is also work involved in manually enrolling students for a class.

Which tool you use—**Class Permission** lists or **Quick Enroll**—depends on which you think is more efficient.

If you have 50 students to get enrolled in any one of three sections, it might be far simpler to set up those Class Permission lists and let the students sort out their schedules for themselves.

If you have five students to enroll in one section of a class, manually enrolling them through Quick Enroll might be easier and faster.

It’s up to you to decide which tool fits your needs better in any situation.

End of Procedure.
Appendix A: Getting a List of Class Numbers

Procedure

You will definitely want a list of Class Numbers so that you can quickly enter the Class when you are enrolling students. You can get that list through UAccess Analytics. (In order to access this dashboard you must have Student-Medium access in UAccess Analytics.)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Launch from <a href="http://uaccess.arizona.edu">http://uaccess.arizona.edu</a>. Click the Analytics/Reporting link. [Analytics/Reporting]</td>
</tr>
<tr>
<td>2.</td>
<td>Click the Dashboards link. [Dashboards]</td>
</tr>
<tr>
<td>3.</td>
<td>Click the Student link. [Student]</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 4.   | Click the **Catalog and Schedule** link.  
   ![Catalog and Schedule](link) |
| 5.   | Click the **Schedule Overview** tab.  
   ![Schedule Overview](link) |
Step | Action
--- | ---
6. | This report contains most of the information you need. But you need to filter it to your department or departments.  
Click the down arrow icon in for the **Academic Org** or **Subject**.

7. | Check the box in front of Physics (or click **Search** to find other values).

8. | Once you've entered your search criteria, save them as your defaults so that they will already be entered the next time you come to this dashboard.  
Click the **Page Options** button.
9. Highlight **Save Current Customization**.

10. If you’d like the page to default to this view every time, click the **Make this my default for this page** option.

11. Click the **OK** link.

12. There’s a whole bunch of useful information here, and you can use it as-is on the dashboard.

   But you can also download the data and edit it so that you can show only what you want.

   Click the scrollbar.
Step | Action
--- | ---
13. | Click the Export link.
14. | You want to download this data as a csv (Comma Separated Value) file, which you can then open in Excel.
| Click the Data link.
15. | Click the CSV link.
### Step 16

Now that you have the data in Excel, you can delete columns you don’t need, such as **Term** and **Meet#**.

The **Class#** in column E is the value you want when you are entering Quick Enrollments.

### Step 17

Once you’ve edited the spreadsheet to suit your needs, you can save it on your computer and, if you choose, print it out.

If you are not the department scheduler, make sure that you check with the scheduler and/or check the dashboard periodically to see whether any new classes have been added to the schedule.

**End of Procedure.**
Appendix B: Searching for Enrollment Requests

Enrollment Request Search (Main Menu > Records and Enrollment > Enroll Students > Enrollment Request Search) allows you to look under the hood to see what enrollment transactions have taken place in UAccess Student.

You can use this tool to answer questions like Who enrolled this student in this class? Who was the last student to enroll in the class? How did the students in a specific class enroll in it? And, who dropped the student out of this class? All without having to contact the Registrar!

For detailed instructions on how to use Enrollment Request Search, please see the online UAccess Student tutorials, available at http://student.tutorials.arizona.edu/. Under the Student Records for Department & College Users section, navigate to Searching for Enrollment Requests and click on the Enrollment Request Search tutorial.
Appendix C: Running an Academic History Report

The Academic History Report (*Main Menu > Records and Enrollment > Transcripts > Request Transcript Report*) is a detailed internal transcript that allows you to view the student’s entire academic history in one place, including transfer credit, not-yet-completed classes, plan changes, and math and writing placement milestones.

For detailed instructions on how to Run a Academic History Report, please see the **online UAccess Student tutorials**, available at [http://student.tutorials.arizona.edu/](http://student.tutorials.arizona.edu/). Under the *Student Records for Department & College Users* section, navigate to *Running Academic History Reports* and click on the *Viewing Transcript Reports* tutorial.