



Getting Around in iSIS

**A Navigation Guide to the K-State
Student System**

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Introduction

Preface

This document is an introduction to the iSIS interface and basic navigation. The purpose is to include information regarding the visual and procedural elements that users will encounter when using iSIS. Therefore, there will be descriptions of buttons, links, fields, text formats, and other basic information organized in such a way as to facilitate a walkthrough as well as a reference guide to getting around in iSIS.

Technical Requirements

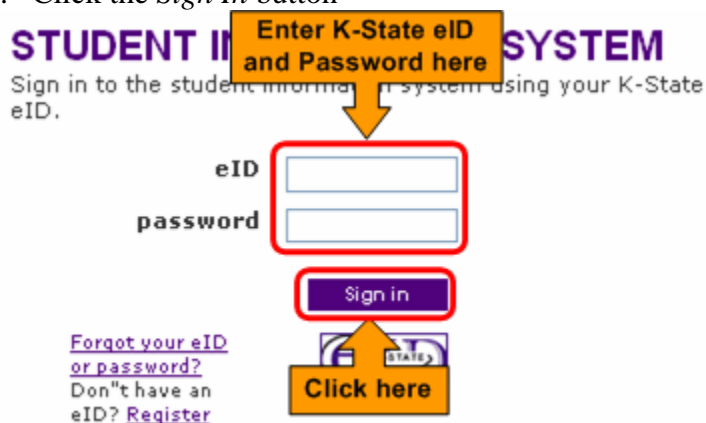
K-State and the iSIS team recommend the following technical specifications for computers, in order to efficiently run the iSIS software:

- Windows 2000, XP, or higher
- 3 GHz processor (1.7 GHz for laptop computers)
- 512 MB RAM
- Web browser
 - **NOTE: iSIS is supported on all major browsers, including Internet Explorer, Firefox, Netscape, and Safari.**
- Internet connection

Getting Around in iSIS

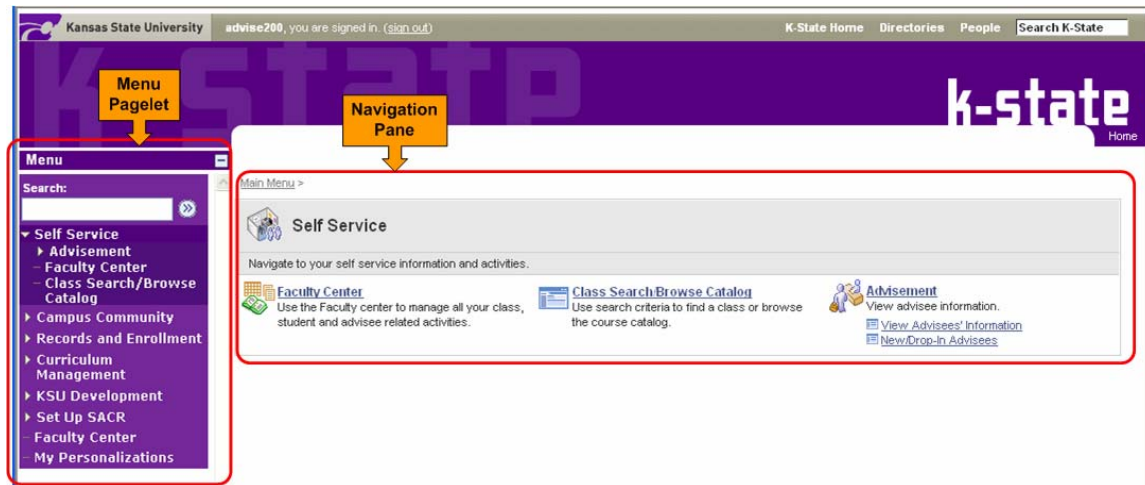
Signing in to iSIS

1. Open Internet Explorer.
 - a. **NOTE: iSIS is supported on all major browsers, including Internet Explorer, Firefox, Netscape, and Safari.**
2. Go to the iSIS Sign-in url: <http://isis.k-state.edu>
 - a. **HINT: You might want to bookmark this page.**
3. Enter your *K-State eID* and *Password*
4. Click the *Sign In* button



5. You are now logged in to the iSIS home page.
 - a. **NOTE: Inactive sessions of iSIS will be automatically signed out after 20 minutes.**

The iSIS Base Navigation Page

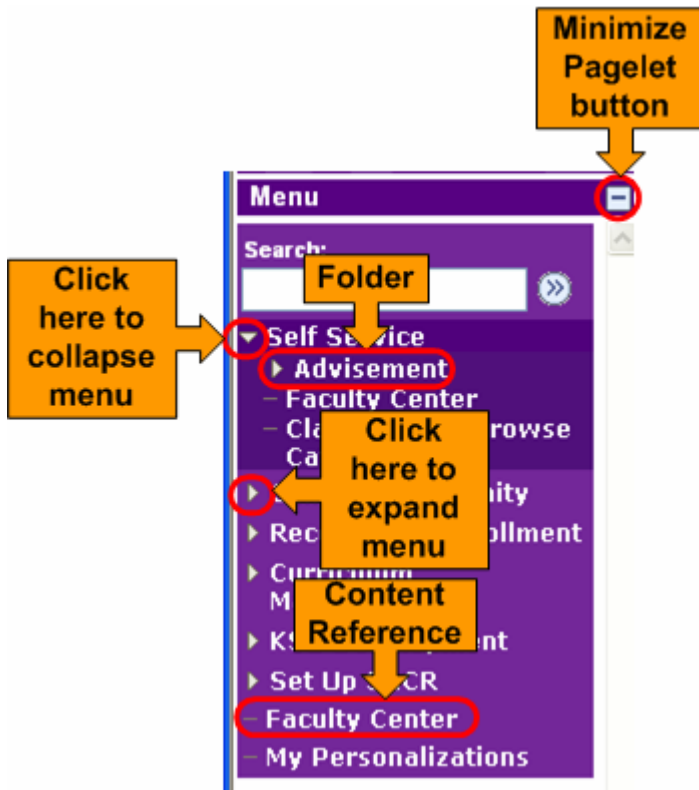


The iSIS Base Navigation Page has 3 primary elements:

1. Menu Pagelet
2. Navigation Pane

The data within iSIS is accessed through Transaction Pages. These pages are grouped into Components which may be accessed through Content References. These Content References are then organized into Folders for ease of locating.

Menu Pagelet

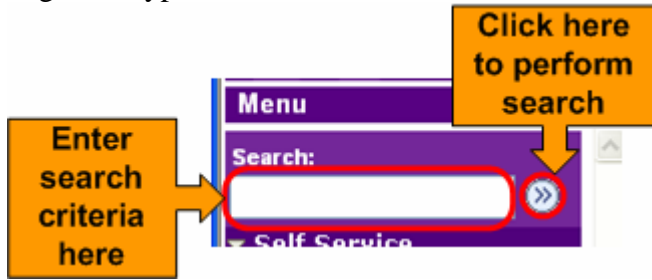


The Menu Pagelet is an hierarchical organization of modules, folders, and Content References. Upon initial sign in, the Menu Pagelet displays a list of modules, or areas within iSIS.

This menu may be expanded or collapsed by clicking on the arrow to the left of the menu item or by clicking the name of the menu item. To get to a desired component, open the associated folders to find the content reference that relates to that component.

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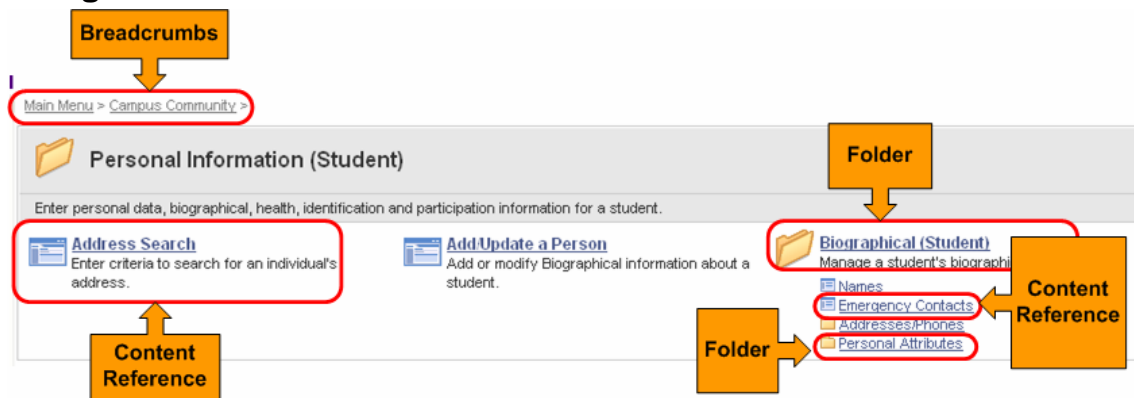
Additionally, components may be located using the Search box at the top of the Menu Pagelet. Type the search criteria and click the double arrow button to perform the search.



To hide the Menu Pagelet from view, click the Minimize Pagelet button (☐). To restore the Menu Pagelet, click the Restore Pagelet button (☐▶) in the upper left portion of the expanded Navigation Pane.

NOTE: If the name of the menu item is clicked, the Navigation Pane area will be populated with the contents of that menu item folder or the search page for the selected component.

Navigation Pane



The Navigation Pane displays a graphical representation of the contents of a given folder (navigation page) that may be used to access iSIS components. These pages are accessed by clicking a folder in the Menu Pagelet or in another navigation page. Once the folder icon or link is clicked, the contents of that folder will display. Each folder will contain additional folders and/or content references. Further navigation within iSIS is possible by clicking additional folder links.

Note from the graphic above that folders and content references may be accessed at the current level of navigation or from within the next level folder. Each navigation page also has a series of links across the top, called breadcrumbs, that indicate the hierarchical path within iSIS that generated the current view.

The edit folder link associated with each navigation page is only for administration purposes and may not be present in your current view.

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The Pagebar

[New Window](#) | [Help](#) | 

The pagebar is located just below the Universal Navigation Header on all transaction pages and search pages. The pagebar contains the following links:

New Window Opens a new browser window.

Help Opens the online PeopleBooks help for the displayed transaction page. Eventually, we hope to be able to include link to K-State specific support documents here, as well.



Copies the current page URL to the clipboard so that it is available for pasting in emails or other applications.

Setting User Defaults

“User Defaults” allow each individual user to set pre-determined values for certain fields throughout iSIS. For example, if you work for a specific academic college (Academic Group in iSIS-speak), say Arts and Sciences, then you could set your preferred Academic Group to be that college. User Defaults are set at the following location:

Set Up SACR → User Defaults

Common User Defaults to Consider

Below are some User Default settings that could substantially save time for many users of iSIS:

User Defaults 1 Tab

Field	Suggested Value
Academic Institution	KSUNV
Career Group SetID	KSUNV
Facility Group SetID	KSUNV
Academic Career	Most common student with which you work (Undergraduate, Graduate, or Veterinary Medicine)
Academic Group	College with which you are associated, if any
Subject Area	Academic department with which you are associated, if any
Term	Current term (this value could change two or three times per year.

User Defaults 2 Tab

Field	Suggested Value
SetID	KSUNV
Business Unit	KSUNV
Campus	KSU
Institution Set	KSU

Searching for Values

When a content reference link is clicked, a search page will open. These pages help to identify the data to be viewed, manipulated, or otherwise utilized. There are two basic forms of search in iSIS:

- Basic Search
- Advanced Search

Basic Search

Student Services Center

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

Find an Existing Value

Search by: ID begins with

[Advanced Search](#)

The basic search allows for searches of data based on limited criteria. Usually, there will be only 1 or 2 fields at a time enabled in the Basic Search. For more search options or to search on more criteria, click the Advanced Search link.

Advanced Search

Student Services Center

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

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

The advanced search allows for a greater variety of criteria when searching for data. Search criteria may be entered in as many or as few fields as desired. **NOTE: Some search pages require that at least one field have criteria associated with it before a search can be performed.** The Advanced Search also allows for searching for values

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using comparative operators, such as <, >, begins with, contains, etc. Advanced searches should be used to recall a range of values.

HINT: The more detailed the search criteria, the fewer search results will be returned. Also note that search criteria that are too detailed may return no results.

HINT: Wildcard characters (generic characters that represent one or more characters in an input) may be used in searched. These characters are:

- % (percent) – indicates a placeholder for one or more characters
- _ (underscore) – indicates a placeholder for exactly one character
- \ (backslash) – indicates the wildcard character is to not be treated as a wildcard

The Component Interface

The screenshot displays the iSIS Component Interface. At the top, there are two tabs: "Instructor/Advisor Table" and "Approved Courses". A red box highlights the "Approved Courses" tab. Below the tabs, there is a header section with "Advise200 Faculty" and "000582926". A green callout box points to a "+ -" button with the text "Click here to 'add (+) or remove (-) rows' to/from a given Region". Below this is the "Instructor Details" section, which is a region. It contains fields for "Effective Date" (08/01/2007), "Status" (Active), "Instructor Type" (Instructor), "Academic Institution" (KSUNV), "Primary Acad Org" (10010), and "Instructor Available" (Available). Below this is the "Instructor/Advisor Role" section, which is another region. It contains fields for "Advisor Number" (1), "Academic Institution" (UGRC), "Academic Program", "Academic Plan", and "Academic Sub-Plan". A red box highlights the "Region" label in the "Instructor/Advisor Role" section. A green callout box points to a "+ -" button in the "Instructor/Advisor Role" section with the text "Click here to 'add (+) or remove (-) rows' to/from a given Region".

The Component page is has three primary sections: Tabs, Regions, and Fields. **Tabs** are used to organize large groups of data into separate pages. Clicking on a tab will open a new part of the component for viewing or editing. **Regions** group data elements into related sets. Regions are typically indicated by a blue bar with the name of the region (see **Biographical History** in the above graphic). Each tab can have one or more regions. **Fields** are the data that are actually entered. Many fields will make up a region.





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Correcting/Updating Data

When running a search, either basic or advanced, where the intention is to make changes to the returned record(s), the Correct History (**Correct History**) box must be checked. If you do not check the Correct History box on the search page, there will be a Correct History button on the transaction page.

Effective Dating

iSIS uses Effective Dating to establish and maintain a history of changes within records. Effective Dates indicate when a particular value or action becomes valid. Adding effective dated rows allows the system to store history. The table below indicates the buttons available in a record view, the associated record values that record will display, and what actions can be taken against that record.

<u>Action Button</u>	<u>Viewable Data</u>	<u>Modifiable Effective Dates</u>
Add 		
Update/Display 	Current, Future	Future dates only (i.e., effective date greater than or equal to current row)
Include History 	History, Current, and Future	Future dates only (i.e., effective date greater than or equal to current row)
Correct History 	History, Current, and Future	All existing rows (i.e., no effective date restrictions)

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Keyboard Shortcuts

Keyboard shortcuts in iSIS come in 2 varieties: Access Keys and Hot Keys.

Access Keys

Access keys move the focus of your cursor to a particular button on a page, at which point you can press ENTER to carry out the command. This is equivalent to clicking the appropriate button.

The following table outlines the shortcuts that you can use in place of clicking the equivalent action button. After pressing the desired key combination, you must press ENTER to carry out the action. For example, to save a page press ALT+I followed by ENTER. Note that some access keys have multiple actions assigned to them, and the usage depends on the currently active page.

Access Key	Function
ALT+9	Accesses the Help line.
ALT+ \	Toggles between Update/Display, Include History, and Correct History action modes on the toolbar on a transaction page.
CTRL+Z	Accesses the menu search box.

You can also use access keys for page tabs to help you move between pages in a component. The access key for a particular page is indicated by the underlined letter in the page tab name. To access a page, press ALT plus the underlined letter, and then press ENTER.

Menu Pagelet Access Keys

Navigate between menus by pressing CTRL+Z, which moves the focus of your cursor to the menu pagelet. From the menu, you may press TAB (or SHIFT+TAB for reverse direction) to navigate through the menu.

Hot Keys

Hot keys perform immediate actions. When you press one, the designated action occurs. Note that several hot keys perform different functions depending on the page that you are on, such as a transaction page or a search page. The following table provides a summary of the Hot Keys available in iSIS.

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Hot Key	Function
ALT+1	Saves a page in a transaction. Moves to the Search or Add button on a search or look up page. Moves to the OK button on a secondary page.
ALT+2	Returns to the search page from the transaction page.
ALT+3	View the next row in the list when the button is active.
ALT+4	View the previous row the in list when the button is active.
ALT+5	Accesses the Look Up page. Opens the calendar prompt.
ALT+6	Opens the pop-up window on a page.
ALT+7	Inserts a row in a grid or scroll area.
ALT+8	Deletes a row in a grid or scroll area.
ALT+0	When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
ALT+ .	View the next set of rows in a grid or scroll area.
ALT+ ,	View a previous set of rows in a grid or scroll area.
ALT+ /	Finds data in a grid or scroll area.
ALT+ ‘	View all rows of data in a grid, scroll area, or search page results list.
ALT+ \	Toggles between Add a New Value and Find an Existing Value on a search page.
CTRL+ J	Displays the system information page.
CTRL+ K	When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.
CTRL+ Y	Toggles the menu pagelet between collapse and expand.
CTRL+TAB	Toggles the focus through the frame set.
ENTER	Activates the OK button, where appropriate. On a search page, activates the Search button. On a look up page, activates the lookup button.
ESC	Activates the Cancel button, where appropriate.

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Getting Help

Accessing help from with iSIS:

In the menu pagelet, click the **isishelp** link. This will open the iSIS Support Home Page in a new window.

iSIS Support Home Page:

<http://www.k-state.edu/isishelp>

LASER Project Website:

<http://laser.ksu.edu>

iTAC Help Desk:

helpdesk@k-state.edu

532-7722

Glossary

Base Navigation Page	The primary browser-based navigation interface.
Content Reference	A link in the menu pagelet that accesses a transaction page. A content reference is a reference to a uniform resource locator (URL) for the transaction page.
Effective Date	The date on which a row becomes effective or the date that an action begins
Folder	A collection of Content Reference objects organized by related data, topic, or process.
Keys	The display-only fields that uniquely identify your data. To display a page, you perform a search using the key fields, such as Empl ID (employee identification).
Menu pagelet	The PeopleSoft navigation structure, located on the left side of your screen. The menu pagelet contains links to content references, which enable you to access transaction pages, from which you can carry out actions and modify your data. Links display in a hierarchical format, some leading directly to transaction pages and some leading to other links. Menu items can expand or contract, depending on their content.
Navigation Pane	Central graphical interface used for navigating between components.
Page	The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.
Pagebar	Collection of links located at the top right of all pages within the Navigation Pane.
Transaction Page	Individual data entry screens used for viewing, manipulating, and creating data.
Worklist	A collection of tasks assigned through system automated processes. These tasks usually require some intervention from the user.