



PeopleSoft Enterprise Academic Advisement 8.9 PeopleBook

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PeopleSoft Enterprise Academic Advisement 8.9 PeopleBook
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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

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See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Academic Advisement Preface

This preface discusses:

- PeopleSoft Products
- PeopleSoft Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Academic Advisement.

PeopleSoft Application Fundamentals

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation called *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook* and *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*. Each PeopleSoft application line has its own version of this documentation.

Note. One or more pages in Academic Advisement operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*.

See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, “PeopleSoft Enterprise Campus Solutions Preface,” Deferred Processing.

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	This chapter discusses application implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the application and other applications. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) This is an introductory chapter that broadly explains the application and the functionality within the application.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of a application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with Academic Advisement

This chapter discusses:

- Academic Advisement overview.
- Academic Advisement business processes.
- Academic Advisement integrations.
- Academic Advisement implementation.

Academic Advisement Overview

Academic Advisement is the application within PeopleSoft Enterprise Campus Solutions that is used to track the requirements and policies that a student must satisfy in order to graduate. As a student progresses towards graduation, the Academic Advisement audit engine analyzes all courses, restrictions, pre-conditions, or conditions completed (both successfully and unsuccessfully) by the student. The application determines what requirements are still outstanding. Using data specified on PeopleSoft Enterprise Student Records pages and requirements entered on Academic Advisement pages, this application automatically tracks a student's degree progress. Academic Advisement is separated into two parts: how to enter requirements into the system using the appropriate pages and how to analyze student data against the requirements in order to report degree progress.

Academic Advisement Business Processes

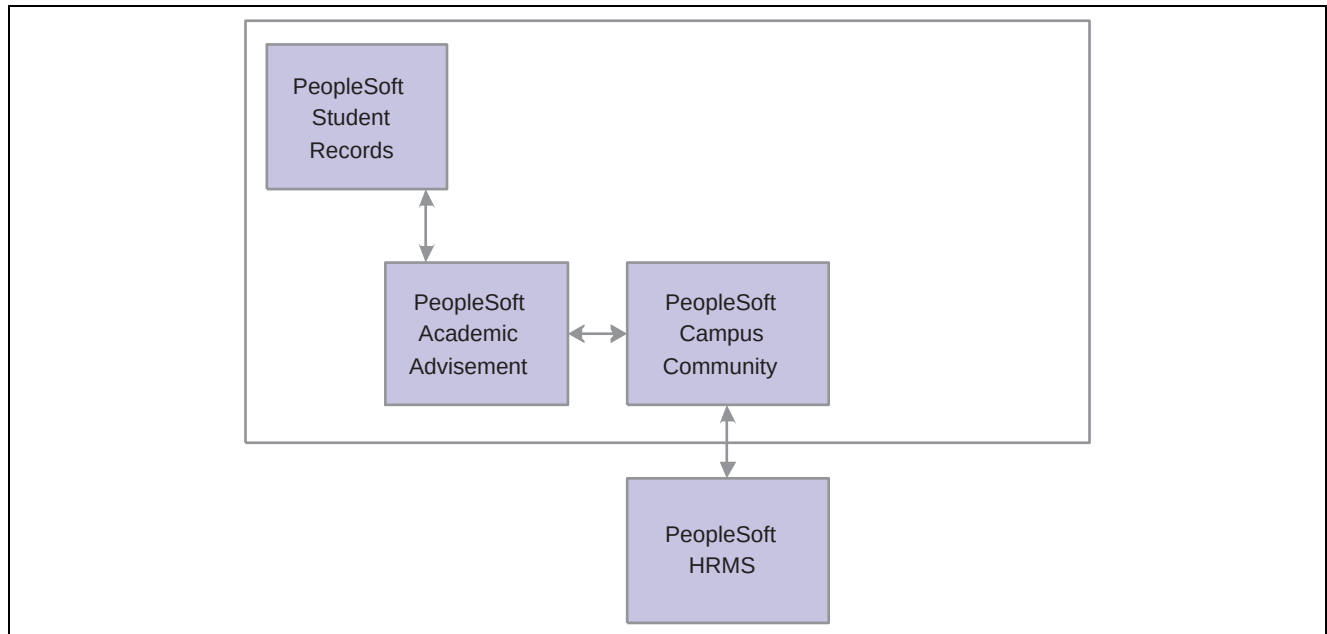
Academic Advisement provides these business processes:

- Define and track graduation requirements.
- Design degree audit reports.
- Evaluate student degree progress.

We discuss these business processes in the business process chapters in this PeopleBook.

Academic Advisement Integrations

Academic Advisement integrates with these PeopleSoft applications:



Academic Advisement integrations

The relational design of Academic Advisement makes the order by which you reach decisions not necessarily the same as the order in which you enter information into the online tables. Although various tables may be considered as a group when making important implementation decisions, you must establish data in some tables before working on other tables.

It is important to note that Academic Advisement shares three of its components with PeopleSoft Enterprise Student Records. Specifically, the following components call upon the same autonumbering record in the Student Admin Installation component:

- Academic Requirement Groups and Enrollment Requirement Groups (both reference the Last Requirement Group field value).
- Academic Requirements and Enrollment Requirements (both reference the Last Requirement ID field value).
- Academic Course Lists and Enrollment Course Lists (both reference the Last Course List Sequence field value).

Because the two applications call upon the same autonumbering records in the Student Admin Installation component, this is a critical thing to consider if you plan to implement one application before the other. If you go live with PeopleSoft Enterprise Student Records in a production database, while setting up your Academic Advisement data in a test database, you may inadvertently create data with duplicate record numbers (if you use autonumbering). This will cause serious problems when you attempt to merge the two sets of data into one database.

One way to avoid this scenario would be to come up with a consistent method of moving data from your test environment to your production environment. Either always create your data in the same database (test or production), or set aside specific ranges of numbers and assign these manually when you create any of the three components that share autonumber record values.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, “Reviewing Installation Setup and System Defaults,” Selecting Student Administration Installation Options

Academic Advisement Implementation

PeopleSoft Enterprise Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation documentation, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface of the *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, “PeopleSoft Enterprise Campus Solutions Preface”

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

Setting Up Academic Advisement Tables

The steps that are discussed in this section provide the order in which you define information in the Academic Advisement tables.

Generally, organizations implement these business processes first. These business processes are discussed in the business process chapters of this PeopleBook.

Step	Reference
1. Define PeopleSoft Enterprise Student Records data.	<i>PeopleSoft Enterprise Student Records 8.9 PeopleBook</i>
2. Define Academic Advisement installation options.	<i>PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook</i> , “Reviewing Installation Setup and System Defaults”
3. Define grade category values.	Chapter 3, “Setting Up Optional Advisement Data,” Setting Up Grade Category Values, page 13
4. Define cumulative GPA values.	Chapter 3, “Setting Up Optional Advisement Data,” Setting Up Cumulative GPA Values, page 15
5. Define special requirement usage values.	Chapter 3, “Setting Up Optional Advisement Data,” Setting Up Special Requirement Usage Values, page 16
6. Define advising transcript types.	Chapter 12, “Processing Academic Advisement Reports,” Producing Quick What-If and Stored What-If Advisement Reports, page 174 <i>PeopleSoft Enterprise Student Records 8.9 PeopleBook</i>, “Setting Up Transcripts,” Designating Degree and Program Data

Step	Reference
7. Define academic course lists.	Chapter 4, “Setting Up Academic Course Lists,” page 21
8. Define academic requirements.	Chapter 5, “Setting Up Academic Requirements,” page 31
9. Define academic requirement groups.	Chapter 6, “Setting Up Academic Requirement Groups,” page 79
10. Define course share sets.	Chapter 8, “Sharing Courses,” page 113
11. Define dynamic conditions and entity groups.	Chapter 10, “Creating and Using Expanded Conditions and Custom Conditions,” page 131
12. Define student exceptions and overrides.	Chapter 9, “Using Advisement Overrides and Course Substitutions,” page 119
13. (Optional) Define self-service advising options.	<i>PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook</i> , “Using Self-Service Advisement,” Processing Self-Service Advisement Reports

CHAPTER 2

Understanding Academic Advisement

This chapter provides an overview of academic advisement concepts and discusses how to:

- Outline the academic structure of an institution.
- Calculate grade point averages.

Understanding Academic Advisement Concepts

The building blocks of this versatile and effective degree audit system are course lists, requirements, and requirement groups. Academic requirement groups consist of academic requirements that are satisfied by course lists.

A course list is a group of courses that can be used to satisfy an academic requirement. By using the mathematical concepts of union, intersection, subtraction, and complement, course lists can interact in countless ways. As a result, different course lists interacting in different ways can often satisfy the same requirement. The system is designed to maximize the reuse of requirement groups, requirements, and course lists by means of set operations, including union (addition), subtraction, and intersection.

Academic requirements contain requirement parameters, pre-conditions, connector types, partitions, detail requisite, restrictions, and line item parameters. Requirements can be very simple (for example, the only required element may be a GPA of 3.000) or very complex (for example, the required elements may be expressed in multiple requirement line items using partition sharing).

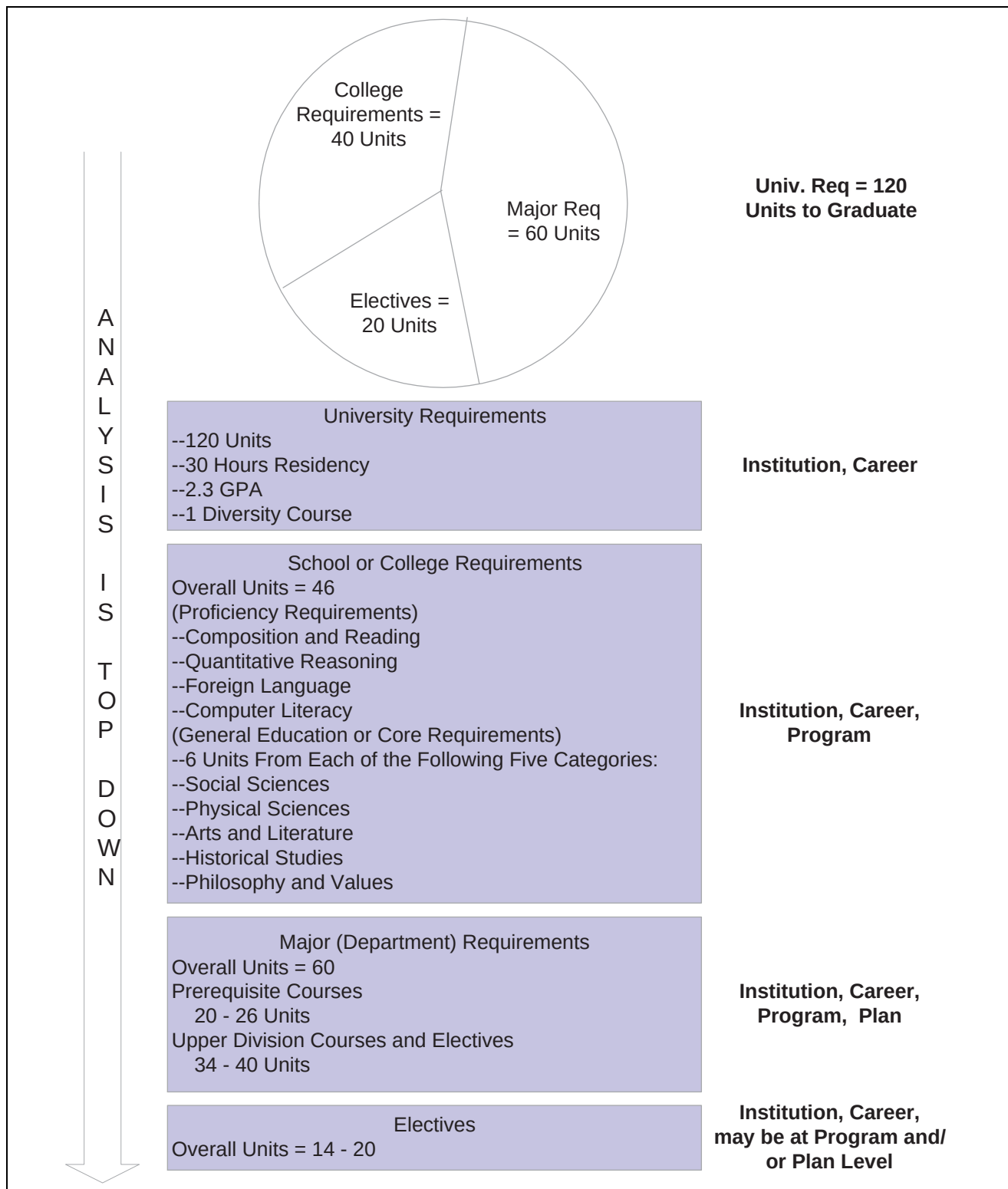
Requirement groups consist of detail lines pointing to conditions, courses, and requirements as well as parameters that include unit and course requirements. The advisement engine evaluates each student's career, program, plan, and sub-plan (plus other pertinent academic data) and determines which requirement groups apply to that student.

Because of the underlying concepts used to establish requirements and to execute degree audits, Academic Advisement is a powerful yet flexible tool. The underlying structure relates to the use of the elements of academic structure.

Traditionally, the academic structure of an institution is built from the top level down (for example, the total number of units needed to graduate through specific requirements for programs and plans). This traditional approach to academic structure is still valid and very necessary; however, while making use of this approach, the Academic Advisement application is built from the bottom level up (for example, course lists are defined first, followed by academic requirements, then requirement groups).

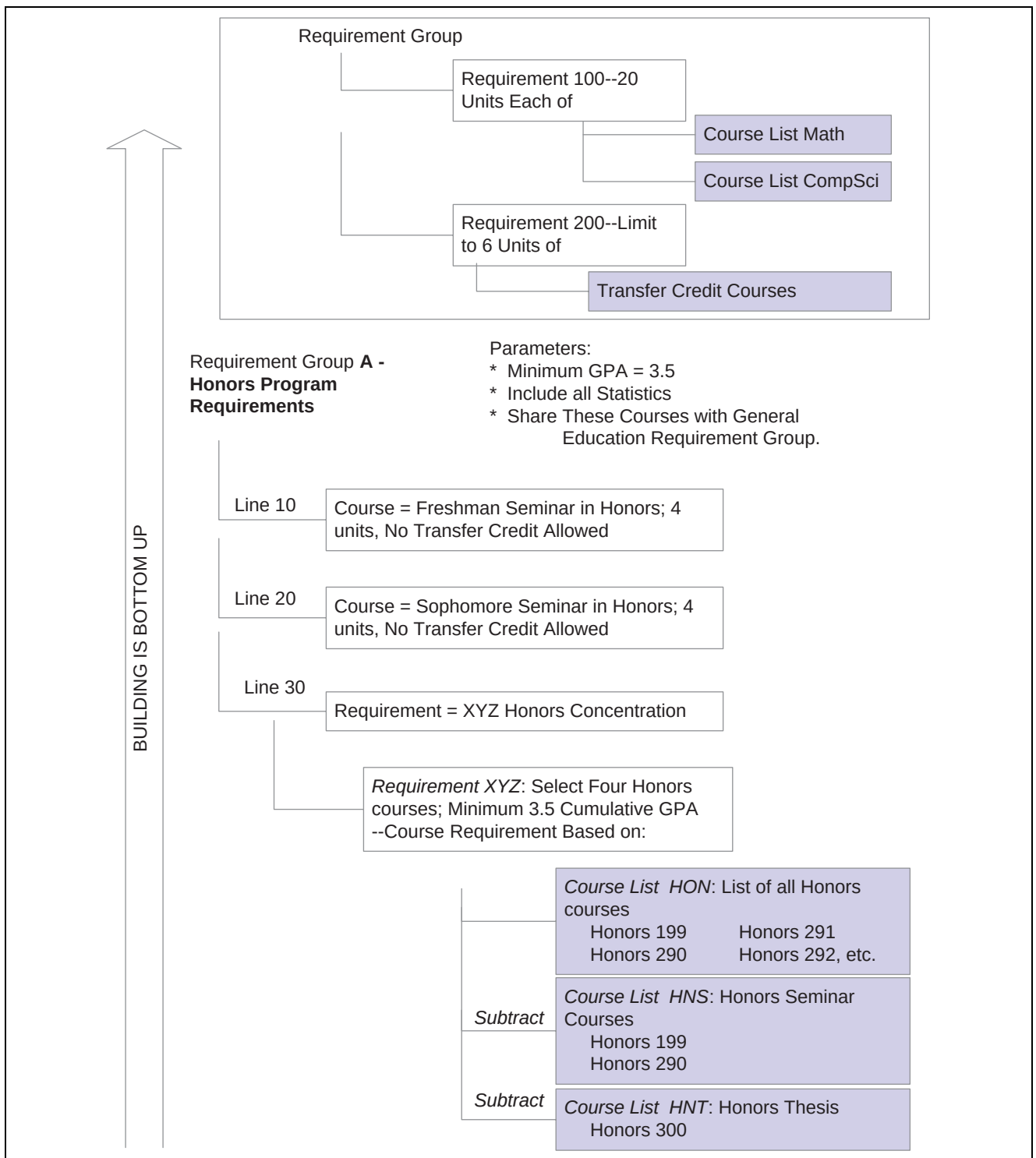
Note. In Academic Advisement, pages are designed to reflect a conceptual flow. As mentioned, Academic requirement groups consist of academic requirements that are satisfied by course lists. Under Setup, components are listed in this order. However, in order for the academic advisement portion of PeopleSoft Enterprise Campus Solutions to work correctly, you must set up or establish the pages in the reverse order. First, define course lists, then set up academic requirements, and then establish requirement groups.

The following diagram presents a traditional four-year institution's degree requirements and the academic structure level at which the rules apply.



Traditional approach to academic advisement concepts (Part 1)

This diagram expresses the degree requirements (from the Part 1 diagram) using academic advisement concepts of course lists, requirements, and requirement groups.



Traditional approach to academic advisement concepts (Part 2)

Outlining the Academic Structure of an Institution

Before entering any data in the Academic Advisement pages, carefully outline the academic advisement structure of your institution. Think carefully about how the institution is structured, what degrees are offered, the requirements for those degrees, and how course lists are organized (for example, a statistics course list might consist of math courses as well as social science statistics or biological science courses, transfer equivalents, and test equivalents).

Important! Establish the academic advisement structure of your institution *before* entering any data on the academic advisement pages. Careful planning will save time and energy.

Phase One: Outlining the Basic Advisement Structure

Outline your academic advisement structure as follows:

1. List all institutions.
2. List all careers associated with each institution.
3. List all programs of study associated with each career.
4. List all plans associated with each program.
5. List any related sub-plans for each plan.

Phase Two: Setting Up Requirement Descriptions and Details

Describe the requirements (and details) of each career, program, plan, and sub-plan in your institution. Begin at the highest level, which is your institution. Work down to the career, program, plan, and sub-plan levels. Next to each requirement description, list specific details about each. (This information will be very useful when setting up detail lines and course lists on the academic advisement pages.)

Try to make your academic structure as complete as possible. The following table is an abbreviated example of this exercise. The table contains the institution, career, program, plan, sub-plan, general requirement description, and specific details about each requirement for each numbered line in the table.

Row	Institution	Career	Program	Plan	Subplan	General Requirement Description	Details
1	PSUNV	UGRD				Must see advisor at least once.	Satisfy milestone of advisor meeting.
2	PSUNV	UGRD				Take the English Placement test.	Pass test with grade of C or better.

Row	Institution	Career	Program	Plan	Subplan	General Requirement Description	Details
3	PSUNV	UGRD				Satisfy unit/GPA minimum.	Complete 120 units with a cumulative GPA of 2.000 in those units.
4	PSUNV	UGRD				Take one diversity course if student began college after 1993.	Share class with general education requirements.
5	PSUNV	GRAD				Complete graduate unit/GPA requirements.	Complete a minimum of 36 units from 500-, 600-, and 700-classes with a cumulative GPA of 2.700.
6	PSUNV	UGRD	FAS			Take a minimum of 56 units outside of the major.	Take a maximum of 56 units from the derived list of all courses used if plan is Art.
7	PSUNV	UGRD	LAS	HIST	ARTHIST	Complete three art history classes.	Use course list of all art history courses. Allow sharing with General Education requirements. Limit sharing to one course.
8	PSUNV	UGRD	LAS	HIST	EUHIST	Complete three European history classes.	Use course list of all European history courses. Allow sharing with General Education requirements. Limit sharing to one course.

Row	Institution	Career	Program	Plan	Subplan	General Requirement Description	Details
9	PSUNV	GRAD	GLAS	EDMA		Declare a sub-plan.	Point to list of appropriate sub-plans.
10	PSUNV	GRAD	GLAS	EDMA	TEACH	Take 12 courses from ED500-course list.	Point to appropriate course list.

In row 1, list any requirements that apply to all students at your institution, regardless of career. There probably will not be many, but there might be a few general requirements that pertain to all students. For example, at PSUNV, all students must meet with their advisor (at least once) and pass the English Placement test during their first year.

In rows 3 and 4, requirements that apply to all students in one particular career (for example, undergraduate) are listed. In row 5, a requirement that applies to all graduate students is listed. In row 6, a requirement that applies to Fine Arts undergraduates is listed. In row 7, a student with a plan of History and a sub-plan of Art History must take three art history courses. In row 8, a similar requirement applies to European History students. In rows 9 and 10, requirements for a Masters of Art in Education are outlined.

When outlining your requirements for the various careers, programs, plans, and sub-plans at your institution, be sure to address the following issues:

- Is there a minimum unit, course, GPA, or partition value?
- Can courses taken on a non-graded basis be used to satisfy this requirement?
- Is transfer work allowed? Or must all course work be taken in residence?
- Can courses be shared between requirements?
- Do any programs or plans require that a plan or sub-plan be declared?
- Can wildcard course lists or derived course lists be used?

Remember to create course lists in order to satisfy requirements. For example, you can create one course list that points to all graduate courses. Then set up each plan in your institution so that it points to this course list. Reuse and intersect that list with all courses in the specified plan.

Calculating Grade Point Averages

GPA is calculated based on units taken. (Cumulative or overall GPA is calculated by the PeopleSoft Enterprise Student Records application, not the Academic Advisement application. In addition, the Student Records application calculates condition GPA values based on the information entered on the Cumulative Statistics page. The Academic Advisement application independently calculates the GPA values for minimum and maximum GPA requirements based on those courses used to satisfy the requirements.) Minimum and maximum unit requirements are based on units earned. Whether or not units taken and units earned are equal, the Academic Advisement engine uses units taken to calculate minimum and maximum GPA (not GPA condition) requirements and uses units earned to calculate unit requirements. If the course used is split (meaning only a portion of the course credit is used due to the minimum or maximum unit requirement parameters), the number of units earned (which counts towards unit requirements) is proportionately affected.

Below are two examples dealing with units taken and units earned.

This first example illustrates a scenario where the units taken and units earned are equal. A student takes English 101 and English 201. In this example, if Minimum GPA is 3.000 and Minimum Units is 6, the requirement will be satisfied.

Course	Units Taken	Units Earned	Grade	Total GPA
English 101	3	3	A	
English 201	3	3	C	
				3.0

This second example illustrates a scenario where partial credit has been assigned to a course; in other words, units earned have been adjusted after enrollment. A student takes English 101 and English 201. However, the institution does not award an equal amount of units earned for the second course. In this example, if the Minimum GPA is 3.000 and Minimum Units are 6, the requirement would not be satisfied based on the units earned for English 201.

Course	Units Taken	Units Earned	Grade	Total GPA
English 101	3	3	A	
English 201	3	1	C	
				3.0

Note. When units earned differ from units taken, the advisement degree audit report displays the units earned. A message appears on the report that indicates the discrepancy between the units displayed and the GPA calculation.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Tracking Student Data,” Understanding How to Assign Special Grade Point Averages

CHAPTER 3

Setting Up Optional Advisement Data

This chapter discusses how to:

- Set up grade category values.
- Set up cumulative grade point average (GPA) values.
- Set up special requirement usage values.

Setting Up Grade Category Values

To set up grade category values, use Grade Category component (GRADE_CATEGORY).

The system uses grade category values on the Grading Scheme Table page and on the Requirement Line Item Detail page. This section discusses how to enter grade category values.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up Grading,” Defining Grading Schemes Chapter 5, “Setting Up Academic Requirements,” Setting Up Requirement Line Item Detail, page 65

Page Used to Set Up Grade Category Values

Page Name	Object Name	Navigation	Usage
Grade Category Table	GRADE_CATEGORY	Set Up SACR, Product Related, Student Records, Grading , Grade Category	Establish new grade category prompt values that can be assigned in the Grading Scheme table and then used as field values for derived lists at the line item detail level. On the Requirement Line Item Detail page, if the line detail type is <i>DLST</i> , then one of the List Recall Mode field values is <i>Grade Category</i> .

Entering Grade Category Values

To set up grade category tables, use the Grade Category component (GRADE_CATEGORY).

Access the Grade Category Table page.

Grade Category Table

[Find](#) | [View All](#) First ◀ 1 of 1 ▶ Last

SetID: PSUNV ***Effective Date:** 01/01/1900 ***Status:** Active + -

*Grade Category	*Description		
NONE	NONE	+	-
PASS	PASS	+	-
XFER	XFER	+	-

Grade Category Table page

Important! Set up one grade category for every setID at your institution. For every table and effective-dated row that you create, include a grade category of *None*. Because Grade Category is a required field in the Grading Scheme table, you can use a field value of *None* in the Grading Scheme table for those grades that do not need a particular value.

Grade Category

Enter the grade category that will become a prompt value on the Line Item Detail page and on any Student Record pages that contain this field. Because values are effective-dated, only those values that are valid as of the effective date are included in any prompting action.

Description

Enter the grade category description that will appear when a field is prompted for field values. The system populates the grade category description by default. However, you can change this value. All alphanumeric characters are valid.

Clearly describe the grade category value. For example, you might want to describe a grade category of *TXFR* as *Transfer Pass*. In that case, the prompt value appears as *Transfer Pass*.

Example

At PSUNV, the total number of pass grades that can be counted toward a bachelor's degree is limited to 24 units. In addition, the total number of pass grades that can be transferred from a community college toward a bachelor's degree is limited to 6 units. A total of 24 pass units is allowed, but only 6 or fewer of those units can be from another institution.

To establish this limit on pass grades, you create two grade categories in the Grade Category table: *P* for pass and *TP* for transfer pass.

In Academic Advisement, you next create a requirement that is a global limit. It points to all courses on a student's transcript with a grade that has a grade category of *P* combined with *TP* (line detail type of *DLST* with a list recall mode of *Grade Category = P U* line detail type of *DLST* with a list recall mode of *Grade Category = TP*) on the Requirement Line Item Detail page. The limit allows a maximum of 24 units.

You then create a second requirement that is also a global limit, which points to all courses on a student's transcript with a grade that has a grade category of *TP* (line detail type of *DLST* with list recall mode of *Grade Category = TP*). This second requirement allows a maximum of 6 units. Any courses over the limit of allowed credits are not counted toward the degree.

Finally, you attach these two requirements to a requirement group. Because global limits go into effect as soon as the advisement engine encounters them, the limits should be at the highest level possible, preferably at the career level. Because career-level requirement groups are processed first, any global limit requirements that are attached at that level apply to the entire audit.

Setting Up Cumulative GPA Values

To set up cumulative GPA values, use the Cum. Grade Point Average component (CUMULTV_GPA).

This section discusses how to enter cumulative GPA values.

Page Used to Set Up Cumulative GPA Values

Page Name	Object Name	Navigation	Usage
Cum. Grade Pt. Average Table (cumulative grade point average table)	CUMULTV_GPA	Set Up SACR, Product Related, Student Records, Grading, Cum. Grade Point Average	Establish new cumulative GPA prompt values for the cumulative GPA field value, which can be used as a precondition or condition throughout academic advisement. These values also appear on certain advisement reports.

Entering Cumulative GPA Values

Access the Cum. Grade Pt. Average Table page.

Cum. Grade Pt. Average Table

[Find](#) | [View All](#) First ◀ 1 of 1 ▶ Last

Academic Institution: PSUNV
 ***Effective Date:** 01/01/1900
 ***Status:** Active + -

Cumulative GPA	Description	
0.0	0.0	+ -
0.5	0.5	+ -
1.0	1.0	+ -
1.5	1.5	+ -
2.0	2.0	+ -
2.5	2.5	+ -
3.0	3.0	+ -
3.5	3.5	+ -
4.0	4.0	+ -

Cum. Grade Pt. Average Table page

Academic Institution

Each cumulative GPA prompt value is associated with only one academic institution. This field is used for prompting, not for analysis.

Cumulative GPA

Enter the cumulative GPA that is a prompt value for preconditions or conditions of Cumulative Grade Point Average. Values are 0 through 9, with a maximum of five positions to the left of the decimal point and three positions to the right of the decimal point (for example, 12345.678).

Description

Enter the cumulative GPA description that will appear when a field is prompted for field values. By default, the system populates the Description column with the cumulative GPA value. However, you can change this value. All alphanumeric characters are valid.

Clearly describe the cumulative GPA value. For example, you might want to describe a cumulative GPA of 2.0 as *C average*. In that case, the prompt value appears as *C average*.

Setting Up Special Requirement Usage Values

This section provides an overview of special requirement usage values and discusses how to set up special requirement usage values.

Understanding Special Requirement Usage Values

In most cases, you will probably run academic advising reports for your students. These reports track students' progress toward graduation, based on their career, program, plan, subplan, and requirement term data.

However, there may be instances when you want to evaluate a group of students based on a different set of criteria. Perhaps you want to evaluate the semester grade point average and academic load for all students in a student group called *Athlete*. Or perhaps you want to evaluate the grade point average of coursework in Accounting 1a and Accounting 2a for all prebusiness majors, to identify those with high grades in these areas and to inquire if they are interested in pursuing a degree in the accounting program. You can do this by creating special academic requirement groups that reference a user-defined requirement usage. The system does not include academic requirement groups with a special requirement usage in general advising reports; the special requirement groups are used only by specially designed transcript type reports that you configure.

Note. The system can process a maximum of 30 special requirement groups that the system can process for a single report request. In addition, for special *usage* requirement groups, the system does not reference the career, program, plan, subplan, and precondition fields to determine which requirement groups apply to each student. Therefore, when creating special usage requirement groups, keep in mind that the system will attempt to apply all requirement groups with the special usage that you define to all students in the batch. If the number of active academic requirement groups with the special usage exceeds 30, the process will fail.

To set up special usage values:

1. Use the Requirement Usage page to define a special usage value.
All user-defined usage values must be 4 characters (for example, ACCT). The first and last characters cannot be spaces. Usage values that are delivered with the system are 3 characters (for example, STD and ADV).
2. Use the Requirement Group page to create an academic requirement group, which may reference one or more academic requirements, and specify the special usage value in the Usage field.
You can assign usage values at the requirement group level only.
3. Use the Basic Data page to create a transcript type that references the special usage value.
Select the Special Advising Report check box and enter the special usage in the Requirement Usage field.
4. Run the report.
 - To run the report for a small group of students by ID, on the Request Header page, specify the transcript type that you defined in step 3 and enter all IDs on the Request Detail page.
 - To run the report for a large group of students by parameters, on the Transcript request page, specify the transcript type that you defined in step 3 and enter the parameters that capture your target population.

See Also

Chapter 3, “Setting Up Optional Advisement Data,” Setting Up Special Requirement Usage Values, page 16

Chapter 6, “Setting Up Academic Requirement Groups,” Setting Up Requirement Groups, page 84

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up Transcripts,” Defining Transcript Type Basic Data

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Producing Transcripts,” Understanding Individual Transcript Requests

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Producing Transcripts,” Creating Batch Transcript Requests

Page Used to Set Up Special Requirement Usage Values

Page Name	Object Name	Navigation	Usage
Requirement Usage	RQRMNT_USEAGE	Academic Advising, Academic Requirements, Define Requirement Usages	Create special usage field values for generating alternate report formats.

Entering Requirement Usage Values

Access the Requirement Usage page.

Requirement Usage

Find | View All 1 of 1

Requirement Usage: PHBK

***Effective Date:** 01/01/1900

***Status:** Active

***Description:** Phi Beta Kappa

***Short Description:** Phi Beta K

***Long Description:** Certify students for honors recognition.

Special Report Format

Requirement Usage page

Note. If the requirement usage is a delivered system value, *No Special Formatting* appears on this page. Delivered requirement usages result in a transcript that includes an advising report. If the requirement usage results in a special advising report as selected on the Basic Data page, *Special Report Format* appears on this page.

Effective Date

Enter an effective date for this requirement usage. The effective date defines when the status that you select is valid. (If any of the requirement usage information changes, you should add a new effective-dated row.) When you create an academic requirement group that references this requirement usage, the effective date of the requirement usage must be less than or equal to the effective date of the academic requirement group.

Status

Active: Select to add a new requirement usage.

Inactive: Select only if your institution will no longer use this requirement usage. If any of the requirement group information changes, you should add a new effective-dated row.

**Description, Short
Description, and Long
Description**

Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Enter a description to use as a search key and to appear in prompts for requirement usage values. The description should accurately describe the requirement usage, so that the label is meaningful as a search key. For example, a description of *Phi Beta Kappa* helps to identify this requirement. The short description appears only on this page. The long description appears on the advising report

Note. Once you have established a requirement usage, a maximum of 30 requirement groups that are flagged with this usage are pulled into audits with this usage specified as part of the transcript type.

CHAPTER 4

Setting Up Academic Course Lists

This chapter provides an overview of academic course lists and discusses how to:

- Maximize the efficiency of course lists.
- Set up academic course lists.

Understanding Academic Course Lists

Academic course lists form the backbone of academic advisement. They are lists of courses or wildcard course lists. For example, a course list might consist of eight history courses. Course lists are used in academic requirements to identify what courses a student must select from to complete a graduation requirement.

You specify courses either by a unique course ID or by using the wildcard indicator. For example, you can insert a row with the course ID for English 62 or set up a wildcard course list of all English courses rather than manually entering each English course row by row.

Maximizing the Efficiency Of Course Lists

To enhance performance, establish the fewest number of sequence rows. It may be more efficient to use a wide-ranging wild card and then use set operation theory to subtract smaller pieces. For example, you may establish undergraduate courses as 100 through 400 level courses and graduate courses at the 500 level. Rather than use a course list with four course sequences, 1##,2##,3##,4##, it would be more efficient to use the wildcard course list at the subject level, or even academic group level, then subtract from the line detail item a course list of 500 level courses.

Using wildcard course lists is an efficient way to establish course lists. To maximize efficiencies, consider the highest level at which you establish a wildcard course list. For instance, if all psychology courses are acceptable to fulfill a requirement, enter *Psychology* in the Subject field, rather than create course sequences with Psych 1##, Psych 2##, and so on.

When evaluating course lists, consider not only what you want to include in the list, but also what you do not want to include. If all of the courses in a subject are valid to be used, with the exception of five, it is more efficient to use a wildcard course list at the subject level and then subtract a course list of those five courses than to establish a course list that details all of the valid course IDs.

See [Chapter 4, “Setting Up Academic Course Lists,” Creating a Course List Detail, page 24.](#)

Setting Up Academic Course Lists

To create an academic course list:

1. Enter the academic institution, career, program, plan, and subplan information for the new course list on the Course List Description page.
2. Establish the details of individual courses that comprise the course list on the Course List Detail page.
3. Indicate the course parameters for the course list on the Course List Parameters page.

Pages Used to Create an Academic Course List

Page Name	Object Name	Navigation	Usage
Course List Description	RQ_COURSE_LIST	Academic Advising, Academic Requirements, Define Course Lists, Course List Description	Describe the course list.
Course List Detail	RQ_CRSE_LIST_DET	• Curriculum Management, Enrollment Requirements, Enrollment Course Lists, Course List Detail • Academic Advising, Academic Requirements, Define Course Lists, Course List Detail	Establish exactly which courses comprise the course list.
Course List Parameters	RQ_CRSE_LST_DPRM	Academic Advising, Academic Requirements, Define Course Lists, Course List Parameters	Establish detail parameters for each course in the course list.

Setting Up a Course List Description

Access the Course List Description page.

Course List Description page

Effective Date and Status

Enter an effective date to define when the status that you select is valid. This date reflects the student's requirement term as determined by the requirement group that uses this course list.

When the advisement process applies a requirement group to a student, the requirement term begin date of the requirement group academic structure determines which effective-dated course list row is current for the student. For example, if you define a requirement group to the plan level, then the system uses the student's plan requirement term to determine the effective date for the requirement group. (You assign requirement terms in the Student Program/Plan component.) The system then uses this requirement term to evaluate the current effective-dated row for all requirements and course lists that the requirement group uses.

For example, suppose that the system applies to a student a requirement group defined at a program level. The requirement group has two effective-dated rows of 01/01/1900 and 01/01/2000. The student's academic program requirement term is fall 1999, so the current effective-dated row for the requirement term of fall 1999 is 01/01/1900. The 01/01/1900 requirement group points to a requirement with effective-dated rows of 01/01/1900 and 01/01/1980. Again, the student's program requirement term is used (because that was the academic structure of the requirement group that uses this requirement), and the current effective-dated row for requirement term fall 1999 is now 01/01/1980. The 01/01/1980 requirement uses a course list with two effective-dated rows of 01/01/1900 and 01/01/1990. Once again the student's program requirement term is used to evaluate the current effective-dated row to be used, which in this case would be 01/01/1990.

Copy

This button appears on this page in Add mode only. You can copy course lists with a usage value of *Academic Advisement* and *Requisite Restriction*. (However, requisite restrictions do not appear if you search for course lists to copy; you must enter the requisite course list number directly

during the copy process.) You cannot copy course lists with a usage value of *Student Individualized Plan*.

To copy a course list, click the Copy button, enter the number of the course list that you want to copy, and select the appropriate copy mode.

Values are:

Copy last record: (The default.) Select to copy only the last effective-dated record.

None: Converts to *Copy last record*.

Copy all records: Select to copy all effective-dated records. (Use this field value only if the course list to be copied has multiple effective-dated rows.)

Then click OK to copy the specified course list.

Because the academic course list pages are more complex than their enrollment course list counterparts, you cannot copy enrollment course lists and requisite restriction course lists into course lists with a usage value of *Academic Advisement*. Course lists with a usage value of *Requisite/Restriction* can only be copied and saved as Requisite/Restriction course lists.

Note. If you use the copy feature to create a new course list, then you cannot assign a course list number to the new list. When you save after clicking the Copy button, the system automatically assigns the next sequential number to the new course list. If you must assign a specific, unused number to the new course list, do not click the Copy button. Instead, create the new course list by reentering all of the field values.

Usage

Select to specify how data in this course list is used. Values are:

Academic Advisement: (The default) Select to use the data recorded on this page during the degree audit process.

Student Individualized Plan: Select to use the data on the Student Override Exceptions pages for degree audit purposes. Use this value when a specific student or group has special requirements. A course list with a usage value of *Student Individualized Plan* can only be used by a requirement with a usage value of *Student Individualized Plan*.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Description, Short Description, and Long Description

Enter a description, short description, and long description for the course list that you are establishing. None of these values appears on the audit reports. These fields are used for documentation purposes only.

Academic Institution, Academic Career, Academic Program, Academic Plan, and Academic Sub-Plan

Use these fields to document departmental ownership of the course list. These fields are used for prompting and documentation only; they do not affect auditing analysis.

Creating a Course List Detail

Access the Course List Detail page.

Course List Detail

Course List: 000000127 Description: ART 140 and 142
 Effective Date: 01/01/1900 Status: Active

Course Sequence

*Course Sequence: 1 ☐ WildCard Indicator
 Course ID: 001168 2D Design ART 140
☒ Include Equivalent Courses

*Course Sequence: 2 ☐ WildCard Indicator
 Course ID: 001167 Three Dimensional "3D" Design ART 142
☒ Include Equivalent Courses

Course List Detail page

Fetch

Click this button to retrieve and display the course sequence data, including the related detail parameters for the effective-dated row. When you access this component, the system loads only effective-dated rows, without any detail, to enhance performance for those course lists that have hundreds of course sequence rows.

Course Sequence

Indicates a unique component of the course list. Each sequence represents a course ID or a group of equivalent courses. The system assigns the numbers sequentially but you can change them. Usually, courses in a course list do not have to be in a particular order. However, you must put courses in sequential order when you plan to assign the course list to a requirement line type of *Sequential Restriction* or *Global Sequential Restriction*. In those cases, enter the correct course order here so that the advising process requires the student to complete the courses in the course sequence that you specify. For example, students should take French 1, French 2, and French 3 in that order.

Course ID

Enter the Course ID that specifies the course needed to satisfy this course list. (Prompt on this field and enter search criteria to narrow down the selection choices.) If a course ID contains multiple offerings, then any of the offerings attached to that course ID satisfies that course list. In addition, if a student takes two offerings in a course ID, then the audit allows both classes to count toward unit and grade point average (GPA) requirements. The classes are treated as separate courses.

This field is unavailable if you select the WildCard Indicator check box.

Include Equivalent Courses

Select to have the system include in its evaluation both the course ID that you specify and all courses that are set up as equivalent to the selected course ID for this course list. If you select this check box, then the following fields become unavailable: Term, Associated Class, and Topic ID.

If you select the check box, the advisement engine must search the database for any valid course equivalencies, even if no equivalencies exist for this course ID. Therefore, clear the check box if the course ID has no equivalents.

Clear this check box to further narrow your course parameters with the Term, Associated Class, and Topic ID fields. For example, you may specify not only the course ID, but also the term in which the specific course must be taken.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Setting Up the Course Catalog,” Creating Course Equivalency Groups.

Term

Enter the term in which the student must take the course that you specify in order for the course to be used in this course list. Leave this field blank to return all values.

Associated Class

Enter the associated class number (of the course that you specify) that the student must take in order for the course to be used in this course list. For class associations, indicate a term to prompt off valid values. Leave this field blank to return all values.

Note. You cannot enter 9999, because this special associated class number can be associated with any other associated class number and is never an enrollment section.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Managing the Schedule of Classes,” Defining Class Associations.

Topic ID

Enter the topic ID (of the course that you specify) that the student must take in order for the course to be used in this course list. This field prompts from the topics defined in the course catalog. Leave this field blank to return all values.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Setting Up the Course Catalog,” Defining Course Catalog Data.

Wildcard Indicator

Select to specify that the course is a wildcard course, and use additional variables to specify the course that you want to capture. The rest of the fields discussed in this section are available.

Academic Group

Enter the academic group from the course catalog offering. (Leave this field blank if any academic group is acceptable.)

Academic Institution

Enter the academic institution.

Subject

Enter the subject of the course offering. (Leave this field blank if any subject is acceptable.)

Catalog Nbr (catalog number)

Enter the required portion of the catalog number that is a 10-character field. Use the format NNNNAAAAAA, where the first 4 characters are numeric (leading zeroes are blank-padded) and the last 6 characters are an alphanumeric suffix. For example, a catalog number of 3## indicates that any 300-level course is acceptable, including 301A, because suffixes are ignored when a number wild card is specified unless a suffix value is exclusively indicated. In another example, a catalog number of 3##B would accept only 300-level courses with a suffix of B. In a third example, a catalog number of 321* indicates that 321, 321A, and 321B (but not 321AB) are acceptable. You can use a wild card in any position in the field. When you use wild cards, the system does not check equivalent courses. (This is an efficiency constraint.)

Note. The Catalog Nbr field does not support ranges. However, you can establish multiple detail lines. For example, in one detail line, you can use a wild card for 100-level courses. In a second detail line, you can use a wild card for all 200-level courses.

Use the pound sign (#) to represent the first 4 numeric values, and use the asterisk (*) to represent the last 6 alphanumeric characters. If you enter #, then the system right-justifies the value. If you enter *, then the system left-justifies the value. For example, 1#* retrieves 1 through 19 plus 1 alphanumeric character.

This table provides an overview of how the system processes different wild card values:

Catalog Number	Results
#	The search retrieves all courses with a single digit catalog number and any number of alphanumeric characters (letters) after the digit. For example, the search engine would pick up 1ABCD.
*	The search retrieves all courses with no numbers and a single alphanumeric character identifier. The system assumes that there are four blank spaces (represented by NNNN) in front of this value.
#*	The search retrieves all courses with 1 digit followed by 1 alphanumeric character.
###	The search retrieves all catalog numbers up to 3 digits, including any characters after the numbers.
##W	The search retrieves all 1- and 2-digit catalog numbers followed only by the character W.

You cannot place alpha characters before numeric characters. The format must be NNNNAAAAAA, where *N* means numeric and *A* means alphanumeric. Specifically, 4 numeric characters must precede all alpha characters.

If the Academic Group, Subject, and Catalog Nbr fields are blank, then the system includes all courses in the academic institution in the course list. If the Academic Group and Subject fields are blank but the Catalog Nbr field is populated, then all courses matching that catalog number are included in the course list, regardless of academic group or subject area. If only the Subject field is populated, then the system selects any course within that subject.

Establishing Course List Parameters

Access the Course List Parameters page.

Course List Parameters page

Course Sequence

Appears by default from the Course List Detail page.

Course Information

Describes the course selected on the Course List Detail page. The system displays course information in course sequence order. If the WildCard Indicator check box is selected, then this field is blank.

Min Units / Course
(minimum units/course)

Enter the minimum number of units that this course, or the courses in this list (if a wildcard list), must provide to be considered valid.

Min Grade Points / Unit
(minimum grade points/unit)

Enter the minimum number of grade points per unit that this course must be worth to be considered valid. This overrides the minimum grade points per course defined for the requirement in the Line Item Parameters page.

Transfer Level Allowed

Select the type of transfer credit (if any) that is acceptable:

Always Allow: (The default) Select to specify that all applicable transfer credit can be used to satisfy the requirement.

Four-Year Institution Only: Select to specify that only transfer credit from accredited four-year institutions can be used to satisfy the requirement.

Never Allow: Select to specify that transfer credit can never satisfy the requirement.

Two-Year Institution Only: Select to specify that only transfer credit from accredited two-year institutions can be used to satisfy the requirement.

None: Converts to *Always Allow*.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Note. The Advisement School Type field on the School Type Table page contains the value that drives the derived lists in academic advisement. Each school type may belong to an advisement school type. On the School Data page, a school may be identified as a two- or four-year institution.

See *PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook*, “Setting Up Prospects,” Setting Up School Types.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Setting Up Transfer Credit Processing,” Defining External Organizations.

Requirement Designation

Select any requirement designation that is a special requirement within this course sequence number.

Typically, this designation is attached to a course and affects one section of that course. A requirement designation may reflect additional work that a student needs to complete in addition to the regular course work; or the designation may be an identifier used to track what sort of requirement this course fulfills. For example, the requirement designation might indicate that the course fulfills the physical education requirement or the architecture design credit. Depending on the setup data in the Requirement Designation table, a separate course grade may or may not be required for designation credit to be earned. If a separate requirement designation grade is required, then you must enter an RD Grade (requirement designation grade) of *Satisfied* on the Grade Roster 2 page or on the Student Enrollment 4 page for the degree audit to include the course. If a separate requirement designation grade is not required, then the student must earn a passing grade in the course for designation credit to be granted. (You define the minimum grade needed.) If a requirement designation is required, then an RD Grade of *Unsatisfied* causes the course to be rejected.

If a separate requirement designation grade is required but the course is still in progress, then the degree audit records the requirement designation as satisfied.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Preparing for the Course Catalog and Schedule of Classes,” Defining Requirement Designations.

Valid Begin and Valid End

Enter the date range that specifies when the student must take this course to satisfy the requisite. Leave these fields blank to specify that when the course is or was taken does not matter. In comparing the date range, the system uses the start date of the term in which the course is or was taken.

Course Must Be GPA Material

Select if the course taken to satisfy this requirement needs to be applied toward the student’s career grade point average calculation. (The course cannot be taken on a pass/no pass or audit basis; it must be taken for a grade.) The default is clear.

Important! On the Grading Scheme table, you must select the Include in GPA check box for each individual grade for the Course Must Be GPA Material check box on this page to work.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Setting Up Grading,” Defining Grading Schemes.

Test Credit is Allowed

Select if the course taken to satisfy this requirement can be taken via the test credit portion of the student’s academic record. (The default is selected.)

- Other Credit is Allowed** Select if the course taken to satisfy this requirement can be taken via the other credit portion of the student's academic record. Note that internal transfer credit is marked and treated as enrolled credit. (The default is selected.)
- Exclude In-Progress Credit** Select if the course taken to satisfy this requirement must be fully graded to be considered valid. If this check box is not selected, then a nongraded course, a course with a grade of incomplete, or a course in progress is included in the academic analysis and satisfies all parameters. (The default is clear.)

Example

In this example, the Exclude In-Progress Credit check box is not selected. To fulfill the English composition requirement, a student must have a minimum of 6 units and two courses from ENGLCOMP 100 and ENGLCOMP 200.

If the advisement processes dictate that in-progress coursework can fulfill course unit requirements, GPA requirements, or both, then you should not select the Exclude In-Progress Credit check box. Note that the advisement report indicates whether the English composition requirement is satisfied by in-progress work, thus alerting the student, the advisor, or both that the requirement is not entirely satisfied and will not be satisfied until the course is successfully completed.

To build this requirement, first create an academic course list that references ENGLCOMP 100 and ENGLCOMP 200. On the Course List Detail page, insert one row for each course. On the Course List Parameters page, do not select the Exclude In-Progress Credit check box.

Then create an academic requirement that references the course list. On the Course List Parameters page, enter a Min Units/Course field value of 2 and a Min Grade Points/Unit field value of 6. On the Line Item page, enter a line type of *Course Requirement*. On the Line Item Detail page, enter a line detail type of *CLST* and enter the course list.

Now create an academic requirement group that references the academic requirement that you created; or attach the academic requirement to some preexisting academic requirement group. On the Requirement Group Detail page, enter a group line type of *Requirement* and reference the academic requirement.

When you run a degree audit report, the requirement appears as satisfied (not bolded) on the audit report. The report also provides a note that the courses used to fulfill the requirement are still in progress. (If the courses reported are fully graded, then a note pertaining to in-progress courses is not needed and does not appear in the report.)

CHAPTER 5

Setting Up Academic Requirements

This chapter provides an overview of academic requirements and discusses how to set up academic requirements.

Understanding Academic Requirements

Academic requirements are graduation rules, that is, rules that the students need to follow to successfully complete their academic objectives. Academic requirements contain requirement parameters, pre-conditions, connector types, partitions, detail requisites or restrictions, and line item parameters. Requirements can be simple (for example, one that requires a minimum GPA of 3.000) or complex (for example, one that has many parts).

After setting up academic requirements, you must attach them to requirement groups. Only then can the audit engine apply a requirement against a student's academic record.

Note. To improve degree audit run times, simplify setup data and requirements. Minimize the number of detail lines and preconditions.

Setting Up Academic Requirements

This section lists prerequisites and common elements and discusses how to:

- Define academic requirements.
- Specify requirement parameters.
- Create a requirement line item.
- Specify requirement line item parameters.
- Set up requirement line item detail.

Prerequisites

Academic requirements typically reference course lists. Therefore, you should set up course lists before you establish academic requirements.

See Also

[Chapter 4, “Setting Up Academic Course Lists,” page 21](#)

Common Elements Used in This Chapter

Course Ranking Scheme

Select a scheme to rank courses only if no other information that would affect course ranking is available. If a student has taken more courses than are needed to meet the requirement, and no other course selection information is available, then the value in this field determines the order in which courses are selected to satisfy the requirement. (Courses are sorted in this order for this requirement only.)

Chronological: Select to rank courses by term (first term to current term).

Course Catalog: Select to rank courses by catalog number (lowest to highest).

Grade Points: Select to rank courses by grade point (highest to lowest). For example, select this value to require students to complete at least five courses in their major with a grade of A.

Reverse Chronological: Select to rank courses by term in reverse order (current term to first term).

Reverse Course Catalog: Select to rank courses by catalog number in reverse order (highest to lowest). For example, select this value to create a requirement that uses 400-level courses before using 100-level courses.

Note. The Course Ranking Scheme field sorts on the field value, but it reports on the audit in chronological order based on term. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Description, Short Description, and Long Description

Enter a description that is meaningful as a search key; this description appears in search results for requirements. For example, enter *1999 req for PSYCH* (1999 requirements for psychology).

Enter a short description, which appears only on this page.

Enter a long description, that is, a detailed description, which you can print on the advisement report. For example, on the Parameters page, the Print Control value controls whether the long description and required parameters are printed on the advising report.

Minimum Units

Enter the minimum total units that are required to satisfy the displayed line number or to satisfy the course requirement.

Pages Used to Set Up Academic Requirements

Page Name	Object Name	Navigation	Usage
Requirement	ADVIS_REQUIREMENT	Academic Advising, Academic Requirements, Define Academic Requirements	Establish the institution, career, program, plan, subplan, and precondition information for a new academic requirement.
Parameters	ADVIS_RQRMNT_PARM	Academic Advising, Academic Requirements, Define Academic Requirements, Parameters	Establish the parameters or filters for the specific academic requirement as well as the type of requirement information to print on the degree audit report.
Line Item	ADVIS_RQRMNT_LINE	Academic Advising, Academic Requirements, Define Academic Requirements, Line Item	Create a requirement line item.
Line Item Parameters	ADVIS_RQ_LINE_PARM	Academic Advising, Academic Requirements, Define Academic Requirements, Line Item Parameters	Establish requirement line item parameters. Indicate additional controls on requirement line items.
Line Item Detail	ADVIS_RQ_LN_DETAIL	Academic Advising, Academic Requirements, Define Academic Requirements, Line Item Detail	Set up additional parameters based on course lists or conditions.

Defining Academic Requirements

Access the Requirement page.

Requirement Parameters Line Item Line Item Parameters Line Item Detail

Find | View All 1 of 1

Academic Requirement: 000001096

***Effective Date:** 01/01/1900 ***Status:** Active

***Description:** ENG Distribution

***Short Description:** Eng Dist ***Usage:** Academic Advisement

***Long Description:** English Distribution: complete one of the three following areas with a minimum of four courses in each: Comparative Literature, Poetry

***Academic Institution:** PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Academic Program: LAU Liberal Arts Undergraduate

Academic Plan: ENGL-BA English (BA)

Academic Sub-Plan:

Pre-Condition: None

Requirement page

Academic Requirement

If you did not specify this unique identifying number when you created the requirement, then the system assigns a number that appears here.

Copy and Copy Mode

The Copy button appears on this page in Add mode only. Two types of requirements are eligible to be copied: academic requirements with a Usage field value of *Academic Advisement* and enrollment requirements with a Usage field value of *Requisite Restriction*.

To copy an eligible requirement, click the Copy button and enter the requirement to copy. Then select a Copy Mode field value:

Copy last record: (Default) Select to copy only the last effective-dated record.

None: Converts to *Copy last record*.

Copy all records: Select to copy all effective-dated records. (Use this field value only if the requirement to be copied has multiple effective-dated rows.)

When you have selected a value in the Copy Mode field, click OK to copy the specified requirement.

Because the setup for academic requirements is more complex than the setup for enrollment requirements, you cannot copy from enrollment requirement pages to academic requirement pages. Further, you can copy requirements that have a Usage value of *Requisite Restriction* only as requisite restrictions. You can copy a requirement with a value of *Academic Advisement* and then change the value of the new copy to *Student Individualized Plan* or *Requirement Course Share Restriction*.

Note. If you use the Copy feature to create a new requirement, then you cannot assign an academic requirement number to the new requirement. When you save after clicking the Copy button, the system assigns the next sequential number to the new requirement. To assign an unused number to the new requirement, do not click the Copy button. Instead, create the new requirement by entering all of the field values again.

Effective Date

Enter an effective date that reflects the student's requirement term as determined by the requirement group that uses this requirement.

When the advising process applies a requirement group to a student, the requirement term start date of the requirement group academic structure determines which effective-dated row is current for the student. For example, if you define a requirement group to the plan level, then the system uses the student's plan requirement term to determine the effective date for the requirement group. (You define student requirement terms in the Student Program/Plan component.) The system then uses this requirement term to evaluate the current effective-dated row for all requirements and course lists that the requirement group uses.

Status

Active: Select to add a new academic requirement.

Inactive: Select only if your institution no longer uses this academic requirement.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Usage

Select the value that specifies how this requirement is applied. (This field is unavailable for entry unless you are in Add mode.)

Academic Advisement: Select to have the system use the data that is recorded on this page to define standard academic requirements or to use the same data on the Requisite Detail page in PeopleSoft Enterprise Student Records.

Student Individualized Plan: Select to have the system use the data that is recorded on this page as an override, or *requirement substitute*, on the Authorize Student Exceptions pages. A requirement with this value can use courses from course lists that have values of both *Student Individualized Plan* and *Academic Advisement*.

Requirement Course Share Restriction: Select to restrict course sharing during the degree audit process based on data in the Course Share Set table (COURSE_SHARE_SET). This value imposes a limit on the courses that can be shared between the requirement groups that are linked by a common course share set. When you select this value, other fields on other pages in the component are unavailable for entry. For example, the Connector Type field on the Parameters page and the Line Type field on the Line item page are unavailable. The set of parameters for course share restriction usage is reduced because there is only one line type: *Unit, Course, or GPA Limit* (grade point average limit).

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

**Academic Institution,
Academic Career,
Academic Program,
Academic Plan, and
Academic Sub-Plan**

Use these fields to document the departmental owner of the requirement and to make searching and prompting easier. These fields are for documentation and prompting only; they do not affect analysis.

Pre-Condition

Select a precondition to restrict application of the requirement to students who match that precondition. For example, if a requirement has a precondition of

Student Group Equal Athlete, then this requirement applies only to students who have the student group *Athlete*. If this precondition is false for a student, then the system does not apply the requirement to the student, but skips it during analysis.

Important! A null set of entities for a student is considered true for all plurals of that entity for both *In* and *Not In* field values because the null set is included in all entity groups and entity group complements.

Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

None: (Default): Select to set no precondition.

Note. If this field contains a value other than *None*, then additional fields are available to complete the precondition statement. Operators for a precondition statement are: *None*, *< or =*, *> or =*, *Equal*, *Greater*, *In*, *Less*, *Not Equal*, and *Not In*. *None* converts to *Equal*.

Academic Level: Select to compare the precondition to the student's academic level on the as of date of the advising process.

Academic Plan: Select to compare the precondition to the student's academic plans (for example, major or minor) within the academic program. If the student has only one plan, then *Academic Plan* and *Primary Academic Plan* reference the same plan.

Academic Plans: Select to specify that all of the student's plans are part of the equation. All of the student's plans must be *in* or *not in* the entity group that you specify.

Academic Program: Select to specify that one of the student's programs is part of the equation. If the student has only one program, then *Academic Program* and *Primary Academic Program* reference the same program.

Academic Programs: Select to specify that all of a student's academic programs are evaluated.

Academic Standing: Select to specify a student's standing at the institution. For example, values might include *good standing*, *probation*, and *dismissal*. You define these values in the Academic Standing Table page. The system evaluates this value against the student based on the as of date of the advising process.

Academic Sub-Plan: Select to specify that one of the student's subplans is part of the evaluation.

Academic Sub-Plans: Select to specify that all of a student's subplans are part of the evaluation.

Cumulative Grade Point Average: Select to specify a student's cumulative grade point average (GPA), which is derived from the student's term history cumulative statistics, in conjunction with the processing as of date.

Primary Academic Plan: Select to specify a student's primary academic plan, which is designated by the lowest plan sequence number on the Student Plan page.

For example, in the LAU (Liberal Arts University) program, a student might have two plans, PSYCH (psychology) and CLASSICS MINOR. If PSYCH has a plan sequence number of 10 and CLASSICS MINOR has a plan sequence number of 20, then PSYCH is the primary academic plan. On the Student Plan page, the primary career is designated as student career number 0.

Primary Academic Program: Select to specify a student's primary academic program, which is designated by the lowest career sequence number. On the Student Program page, the primary career is designated as student career number 0.

Student Group: Select to specify a group of students that you define in the Student Group Table page; for example, Athlete and Veteran.

Student Groups: Select to specify that all student groups that contain a student are part of the equation.

Table Entry: If the precondition is *Table Entry*, then operators are not used. In that case, select a dynamic condition from the Define Dynamic Condition component.

Primary Academic Plan and Primary Academic Program

The primary academic plan is designated by the lowest plan sequence number on the Student Plan page. The primary academic program is designated by the lowest career sequence number on the Student Program page. When a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number in a specified program, but it is the plan with the lowest plan sequence number in the program with the lowest student career number.

For example, suppose that in a LAU program that is attached to a student career number of 0, a student has the PSYCH plan with a plan sequence number of 10. The same student has the ART plan with a plan sequence number of 10 in the FAU (Fine Arts University) program that is attached to a student career number of 1. Both plans have a plan sequence number of 10, but the plan in the program with the lowest career number is the primary plan. In this example, the primary plan is PSYCH, which is related to a student career number of 0 through the LAU program.

See Also

Chapter 10, "Creating and Using Expanded Conditions and Custom Conditions," Defining Expanded Conditions, page 131

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Managing Student Programs, Plans, and Subplans," Maintaining Students' Program Stacks

Specifying Requirement Parameters

Access the Parameters page.

Throughout the advisement application, you can set parameters at a number of different levels. To decrease processing time, use only those parameters that are absolutely necessary for the requirement. For instance, evaluate whether both minimum unit and minimum course count parameters are necessary. If all of the courses that are valid to satisfy the requirement are the same unit value, then it may be possible to remove the unit parameter and simply count courses.

Enrollment Requirement Parameters Line Item Line Item Parm Line Item Detail

Find | View All First 1 of 1 Last

Academic Requirement: 000001137 Description: Art 140-142

Effective Date: 08/25/1997 Status: Active

Course Credit Parameters

Minimum GPA: Default for Detail Level

Minimum Units: Min Grade Points/Unit:

Minimum Courses:

Detail Selection Parameters

Connector Type

☒ AND ☐ OR

Parameters page

Note. For requirement parameters to work, you must define detail lines on the Line Item page. You can set up the parameters first, but detail lines are necessary for the parameters to take effect.

The fields on this page are identical to the fields on the Requirement Group Parameters page. If the parameters that are entered on the Parameters page are greater than the parameters that are entered on the Requirement Group Parameters page, then the parameters on the Parameters page override those that are specified at the requirement group level. *Always* specify parameters at the lowest level possible.

For example, if the requirement specifies that the minimum number of units is 24, and the requirement group specifies that the minimum is 18, then the audit attempts to find 24 units. The reciprocal is also true: If the requirement minimum is 6 units, and the requirement group minimum is 10 units, then the audit engine searches for 10 units.

If a requirement (or a requirement group) needs a minimum number of units or courses that is greater than the sum of the specific line requirements, and the Credit Include Mode field value is *All Stats* (all course statistics) at the requirement (or requirement group) level, then the advisement engine first uses as many units or courses as needed to satisfy the lowest parameter level. For example, if a single requirement line needs one course, and a requirement group points to that requirement (which requires two courses), then set the minimum course parameter to *1* at the requirement line level and set it to *2* at the requirement group parameters level.

Minimum GPA

Enter the minimum overall GPA requirement for classes selected to satisfy this requirement. For example, if a requirement states that the student needs to take four Math 100-level classes with an overall GPA of 3.000 for a total of 12 units, enter *3.000* in this field. In-progress courses or grades that are not included in the GPA (for example, pass and no pass or transfer credit grades) satisfy the minimum GPA requirement.

Important! Any value in this field populates the Line Item Parameters page.

Default for Detail Level

The system populates this value by default to each detail line, where you can override it.

Min Grade Points/Unit (minimum grade points/unit)

Enter the minimum grade points per unit for each class that is selected to satisfy this requirement.

Minimum Courses

Enter the minimum number of courses that are needed for this requirement. To include courses that are worth 0 units and one course count for the requirement, you must specify a value in this field. If the Minimum Units field contains a field value but this field does not, then the audit does not use courses such as remedial courses that are worth 0 units.

Reporting

Select the conditions under which the system reports the requirement on the advising report:

Always Report: Select to always report the requirement, regardless of the completion status.

Note. Except for *Always Report*, every reporting value acts as a postcondition.

Report Only When Not Satisfied: Select to report the requirement only if the student does not successfully complete it. For example, you might select this value to report a probationary status message, from the Satisfactory Academic Progress office, for all students who do not complete a minimum number of units or a minimum grade point average per term.

Important! This value behaves differently, depending on whether the Credit Include Mode value is *All Stats* or *Verify*. For example, for a requirement with a minimum unit value of 3.00, a Credit Include Mode value of *All Stats*, and a reporting value of *Report Only When Not Satisfied*, the results of the audit are not predictable because the setting creates a logical paradox. However, if you select *Verify*, then the result is predictable.

Report Only When Satisfied: Select to report this requirement only when the student successfully completes it. For example, you might select this value to report honors status.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Credit Include Mode

Select how courses in the requirement are included in the degree audit:

All Stats: Select to report all course statistics. A course that is captured by an *All Stats* requirement is permanently used for that requirement and cannot be counted toward any other *All Stats* requirement.

Excl GPA (exclude grade point average): Select to exclude courses in this requirement from the GPA of the overall requirement group GPA that contains this requirement. As with *All Stats*, a course that is captured by an *Excl GPA* requirement is permanently used for that requirement and cannot be counted toward any other *All Stats* or *Excl GPA* requirement.

Verify: Select to specify that the system verifies that the course was taken, but does not record credit for passage up to the requirement group. A course that is captured by a *Verify* requirement can be used by another *Verify*, *Excl GPA*, or *All Stats* requirement. However, the course is counted toward requirement completion. For example, for an undergraduate diversity requirement, verify that all undergraduate students who are following a particular catalog year complete at least one course with a multicultural component. Set to *Verify*, this requirement verifies the existence of the multicultural course and releases it for

use toward another requirement, such as a general education social studies requirement or a women's studies minor requirement.

Important! When the Credit Include Mode value is *Verify*, the parameters (Minimum Units and Maximum Units Allowed values) act as boundaries for determining a truth value. For example, if the value of Minimum Units is *6.0*, then the value of Maximum Units Allowed is *15.0*, and the student has fewer than 6 or more than 15 units, then the truth value is false. If the student is within this range, then the truth value is true. The *Verify* value accepts and reports all courses that match the course list, whereas the *All Stats* and *Excl GPA* lines use the minimum or maximum values to exclude courses from use for the requirement, so that they can be used elsewhere in the audit.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Choice Resolution Method

Select the preferred method of analyzing the selection of courses in multiple partitions in an AND or OR statement:

None: Same as Satisfy in Sequential Order.

Satisfy in Sequential Order: Select to specify that the system evaluates lines in sequential order except for limits that are analyzed first. For example, if the requirement is Line 10 OR Line 20 OR Line 30 OR Line 40, where partition sharing is *not* enabled and the minimum number of partitions to complete is two, then any partitions must be satisfied, even though Line 10 and Line 20 are analyzed first.

In another example, if a requirement is Line 10 OR Line 20, then a course that can satisfy both Line 10 and Line 20 is used to satisfy Line 10 if Line 10 is not already satisfied. If a student has completed Math 1 and Math 5, and Line 10 requires Math 1 and Math 2 and Line 20 requires Math 1 and Math 5, then Math 1 is used to satisfy Line 10, not Line 20. When the value is *Satisfy in Sequential Order*, a student can satisfy Line 20 before Line 10 if the lines require different courses and the student has completed the required courses for Line 20.

Investigate All Combinations: Select to specify that after the system analyzes limits, it sorts detail lines to find the best combination with regard to the requirement. If the requirement is Line 10 OR Line 20 OR Line 30 OR Line 40, where partition sharing is *not* enabled, and the minimum number of partitions to complete is two, then courses that satisfy multiple partitions can be used in any two of the lines.

Connector Type

Select the main connector type for this requirement. The connector type specifies the main (default) Boolean operator that is to be used in the equation that contains the detail lines. Detail lines that are joined by the opposite of the main connector type are grouped into one partition. Detail lines that are joined by the main connector are considered as individual components (or partitions) of the equation. A partition is each detail line in the equation or each set of detail lines that are grouped by parentheses.

For example, if the connector type is AND and the detail lines are A OR B AND C OR D AND E, then the detail appears on the page as (A OR B) AND (C OR D) AND E. The first partition is (A OR B), the second partition is (C OR D), and the third partition is E. The main connector (that is, the connector

that joins the partitions) is AND. (The connector that joins components within a partition is always the opposite of the main connector type.)

In another example, if the main connector is OR and the detail lines are A OR B AND C OR D, then the detail appears on the page as A OR (B AND C) OR D. The first partition is A, the second partition is (B AND C), and the third partition is D. The system uses the Connector Type value as the connector default on the Line Item page when you insert rows.

If the connector type is OR, then the following page elements are available for entry: the Partition Sharing, Min Partitions to Complete, and Max Partitions to Allow Credit check boxes and the Print Control drop-down list

Important! Regardless of which Choice Resolution Method value you select, if the student does not meet the requirements of any of the lines, then the audit lists the courses that are available to fulfill each of the partitions. If the student meets the requirements for the minimum number of partitions, then the audit lists only the courses for the satisfied partitions.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Partition Sharing

Select if partitions can share courses. (The default for this check box is cleared, not selected.) For example, in the statement (A OR B) AND (B OR D), there are two partitions. If the student took course B, then only one or both partitions would be satisfied, depending on whether sharing was enabled. If the Credit Include Mode value is *Verify*, then you do not need to activate partition sharing. However, if a history course satisfies both the general education requirement and the writing requirement, then select this check box to share courses on those two requirement lines.

In another example, the statement is (A AND B) OR (C AND D) OR (A AND F) OR (C AND G). The value of Min Partitions to Complete is 2, and Partition Sharing is selected. If the student took courses A, B, and F or courses C, D, and G, then the statement is satisfied.

Min Partitions to Complete (minimum partitions to complete)

Enter the minimum number of partitions that the student must complete to satisfy the requirement. For example, in the statement A OR B OR (C AND D), if the value in this field is 2, then the audit engine searches for two of the three partitions.

Max Partitions to Allow Credit (maximum partitions to allow credit)

Enter the maximum number of partitions that the system can credit toward meeting a requirement. For example, you might use this feature in a distribution requirement where a student must meet five of seven requirement partitions, but cannot get credit for more than five partitions.

Print Control

Select a value to control whether the long description (from the Requirement page) and the required parameters (from the Parameters page) are printed on the degree audit report. This field controls *only* the requirement level, not the requirement group or the requirement line level.

Print on Audit Reports: Select to specify that the system always prints requirement information (the long description and the required parameters) on the report.

Do Not Print: Select to specify that the system never prints requirement information (as well as the line item parameter information) on the report.

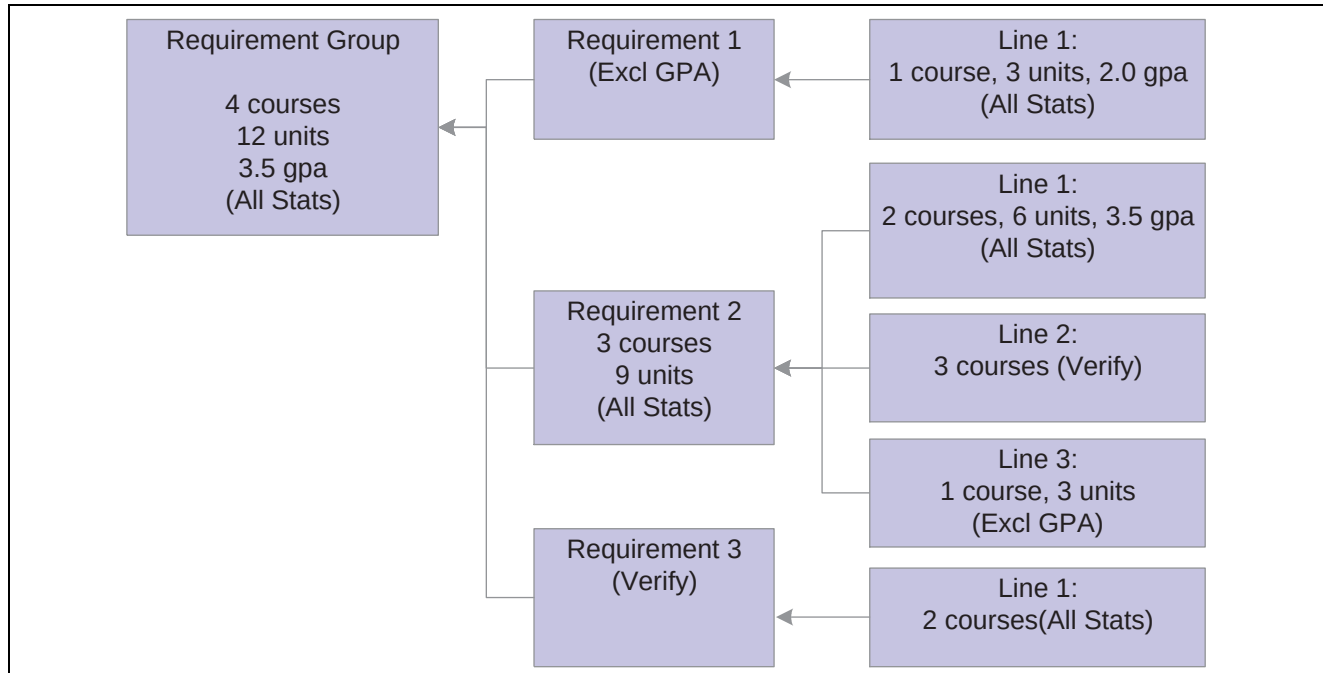
Print If There is Line Detail: Select to specify that if line detail is used to satisfy this requirement, then the system prints the information on the report in addition to the requirement information.

Skip Printing of This Level: Select to specify that the system prints requirement lines (but not a description of the requirement itself) on the report. This value is not used in analysis; it affects the printout format only.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Example of Credit Include Mode

In the following example, the requirement group requires a total of four courses for 12 units with a combined minimum GPA of 3.5. The three detail lines (requirements) contribute to these parameters according to the Credit Include Mode value that is assigned at each level.



Credit Include Mode diagram

Requirement 1 has one detail line. The line requires one course of 3 units with a minimum GPA of 2.0. The Credit Include Mode value for this line is *All Stats*, so that the units, course count, and GPA can be passed to the requirement level. The requirement Credit Include Mode value is *Excl GPA*, so that only the units and course count to contribute to the minimum parameters that are required at the requirement group level.

Requirement 2 requires a minimum of three courses for a total of 9 units. Line 1 requires two courses with a minimum of six units and a minimum GPA of 3.5. Credit Include Mode for this line is set to *All Stats*, so all information is passed to the requirement level. Because this is the only line that contributes to the GPA at the requirement level, the GPA that is required at the requirement group level is derived from the courses that are captured here. Line 2 requires three courses, but the Credit Include Mode value at this level is *Verify*, so no course information is passed to the requirement level. No courses that are used here contribute to the three courses or 9 units at the requirement level. This line only helps to satisfy the overall requirement by passing a true (if the three courses are found) or false. Line 3 requires one course of 3 units. Credit Include Mode for this line is set to *Excl GPA*, which prohibits the line from contributing to the minimum 3.5 GPA at the requirement group level. Only the course count and units are passed to the requirement level.

Requirement 3 has one detail line that requires two courses. The Credit Include Mode value for this line is *All Stats*, so courses are used to satisfy this line, and the course count, units, and GPA are passed to the requirement level. However, the Credit Include Mode value for the requirement is *Verify*, so no course information is passed to the requirement group level. This requirement passes a true or false value to the requirement group level and is used in determining the completion status of the overall requirement group.

Example of Choice Resolution Method

When the choice resolution method is *Satisfy in Sequential Order* and a requirement is Line 10 *OR* Line 20, the system uses a course that could satisfy both lines to satisfy Line 10 if Line 10 is not already satisfied. For example, if a student has completed Math 1 and Math 5, and Line 10 requires Math 1 and Math 2 and Line 20 requires Math 1 and Math 5, then Math 1 is used in Line 10, not Line 20. (When the choice resolution method is *Satisfy in Sequential Order*, a student can satisfy Line 20 before Line 10 if the lines require different courses and the student has completed the required courses for Line 20.)

If you change the choice resolution method for this example to *Investigate All Combinations*, then the system could use Math 1 to satisfy either Line 10 or Line 20. Because using it in Line 20 in this example completes the requirement, it is the best combination and the system would therefore use it.

This table shows the effect of using the choice resolution methods:

Requirement	Satisfy in Sequential Order	Investigate All Combinations
Requirement 1234 Minimum Partition = 1 OR Connector Type	Requirement not satisfied	Requirement satisfied
Line 0010 Minimum 2 courses Course list of Math 1 and Math 2	Math 1	NA (Not Applicable)
OR	NA	NA
Line 0020 Minimum 2 courses Course list of Math 1 and Math 5	Math 5	Math 1 and Math 5

In another example, when lines are joined with an AND connector, the choice resolution method again decides where the system should use classes, if the classes can be used in multiple lines and partition sharing is not enabled. In this scenario, then the student completes Math 1 and Math 2 with this setup:

Requirement	Satisfy in Sequential Order	Investigate All Combinations
Requirement 5678 AND Connector Type	Requirement not satisfied	Requirement satisfied
Line 0010 Minimum 1 course Course list of Math 1 and Math 2	Math 1	Math 2
AND	NA	NA
Line 0020 Minimum 1 course Course list of Math 1 and Math 5	NA	Math 1

How Requirement Lines and Partitions are Sorted

When you run the process to generate an advisement report, the system calls a routine (SRPCARN1) that calculates the priority of lines if the requirement contains partitions or if it is an OR requirement. The system processes the lines and assigns a priority to the lines to select the best solution. The status of the line, indicated by a key value, determines how lines are sorted.

The four key values and the line status they represent are:

- 3: The line is satisfied.
- 2: The line is not satisfied, but courses have been used.
- 1: The line is not satisfied, no courses have been used, but either courses are qualified or conditions have been used.
- 0: The line has no courses or conditions.

The system gives priority to all satisfied lines over incomplete or unused lines. The logic applies to both *Satisfy in Sequential Order* and *Investigate All Combinations*. However, if the choice resolution method is *Investigate All Combinations*, then the system calculates priority differently based on the parameters (for example, minimum units) that are passed to the routine. The following lists show the priority in which the lines are selected when you use the *Investigate All Combinations* option. The value in parentheses (descending or ascending) represents the priority order. For example Line GPA (descending) means that priority is given to lines where the gpa value is highest.

If you require minimum units for the requirement group or requirement, lines are selected in this order: in parentheses are the order (ascending or descending) in which items are prioritized:

1. Line status (descending).
2. Line units (descending).

3. Line courses (descending).
4. Line GPA (descending).
5. Line qualified units (descending).
6. Line qualified courses (descending).
7. Line qualified GPA (descending).

If no minimum units are required and minimum courses are required for the requirement group or requirement:

1. Line status (descending).
2. Line courses (descending).
3. Line units (descending).
4. Line GPA (descending).
5. Line qualified courses (descending).
6. Line qualified units (descending).
7. Line qualified GPA (descending).

If no minimum units or courses are required and a minimum GPA is required for the requirement group or requirement:

1. Line status (descending).
2. Line GPA (descending).
3. Line units (descending).
4. Line courses (descending).
5. Line qualified GPA (descending).
6. Line qualified units (descending).
7. Line qualified courses (descending).

If no minimum values are required for the requirement group or requirement:

1. Line status (descending).
2. Line rank (ascending).
3. Line number (ascending).

How Courses are Sorted

When you run the advisement process, the system calls a routine (SRPCARN2) that determines how courses are sorted. Some course characteristics may alter the sort order. The first characteristic that alters the sort order is the course status. The audit engine examines the course status as it creates a solution that explains how the course was used. The possible course status values are:

- The course is a substituted course, which you defined on the Course Substitution page or in the Authorize Student Exceptions component.
- The course is an excluded course, which you defined in the Authorize Student Exceptions component.
- The course is soft-excluded, which is a course that is excluded when limits or course and unit maximums on requirement lines are reached. The types of limits that cause a course to be soft-excluded are a unit, course or GPA limit, a global limit, a sequential restriction, and a global sequential restriction.

- The course is not substituted or excluded.

This high-level sort order ensures that courses that are substituted are given priority over regular courses, and that courses that are flagged for exclusion are given the lowest priority. Another characteristic is the course ranking. By default, this value is set to the order in which the course is passed into the routine.

Based on parameters that are passed into the sort routine, courses are sorted in this order:

Chronological Sort

1. Status of the course (ascending).
2. Term (ascending).
3. Course units (descending).
4. Course ranking (ascending).

Reverse Chronological Sort

1. Status of the course (ascending).
2. Term (descending).
3. Course units (descending).
4. Course ranking (ascending).

Grade Points Sort

1. Status of the course (ascending).
2. Grade points for the course (descending).
3. Course units (descending).
4. Course ranking (ascending).

Catalog Number Sort

1. Status of the course (ascending).
2. Catalog number (ascending).
3. Course units (descending).
4. Course ranking (ascending).

Reverse Catalog Number Sort

1. Status of the course (ascending).
2. Catalog number (descending).
3. Course units (descending).
4. Course ranking (ascending).

Combinations of Print Control and Credit Include Mode Values

The Print Control field appears on the Parameters page and on the Line Item Parameters page. The Credit Include Mode field appears on the Requirement Group Parameters page, the Parameters page, and the Line Item Parameters page. Depending on the values for Print Control and Credit Include Mode, some combination of the requirement group long description, the requirement long description, the requirement line long description, the courses, and the conditions is printed on the audit report.

The following table shows almost all possible combinations of the Print Control and Credit Include Mode values and whether long descriptions, course, or condition data prints on the advisement report.

Note. Often, more than one combination results in the same information being printed on the audit report. For example, the settings in lines 8 and 10 of the following table cause the same information to be printed.

Table Legend

The following is a legend of credit include mode and print control values used in the table:

- AS: All Stats.
- DNP: Do Not Print.
- PITILD: Print If There Is Line Detail.
- SPOTL: Skip Printing of This Level.
- POAR: Print On Audit Reports.
- DNPLD: Do Not Print Line Detail.
- VER: Verify.
- ANY: Any field value.

Notes

Note the following information about the table:

- *Yes* and *No* values on the table indicate whether the item appears on the advisement report.
- The *Exclude GPA* value is not included in this table because the results are the same as the results of the *All Stats* settings.
- Entries are based on a requirement with a course or condition line type that is partially or completely satisfied.
- The Reporting field on the Parameters page is not included.

Req Grp Credit Incl Mode	Req Grp Long Descr	Req Credit Incl Mode	Req Print Cntrl	Req Long Descr	Req Line Credit Incl Mode	Req Line Print Cntrl	Req Line Long Descr	Crse or Cond Data
AS	Yes	AS	DNP	No	AS	DNP	No	No
AS	Yes	AS	DNP	No	AS	DNPLD	No	No
AS	Yes	AS	DNP	No	AS	PITILD	No	No
AS	Yes	AS	DNP	No	AS	SPOTL	No	No
AS	Yes	AS	DNP	No	AS	POAR	No	No

Req Grp Credit Incl Mode	Req Grp Long Descr	Req Credit Incl Mode	Req Print Cntrl	Req Long Descr	Req Line Credit Incl Mode	Req Line Print Cntrl	Req Line Long Descr	Crse or Cond Data
AS	Yes	AS	PITILD	Yes	AS	DNP	No	No
AS	Yes	AS	PITILD	Yes	AS	DNPLD	Yes	No
AS	Yes	AS	PITILD	Yes	AS	PITILD	Yes	Yes
AS	Yes	AS	PITILD	Yes	AS	SPOTL	No	Yes
AS	Yes	AS	PITILD	Yes	AS	POAR	Yes	Yes
AS	Yes	AS	SPOTL	No	AS	DNP	No	No
AS	Yes	AS	SPOTL	No	AS	DNPLD	Yes	No
AS	Yes	AS	SPOTL	No	AS	PITILD	Yes	Yes
AS	Yes	AS	SPOTL	No	AS	SPOTL	No	Yes
AS	Yes	AS	SPOTL	No	AS	POAR	Yes	Yes
AS	Yes	AS	POAR	Yes	AS	DNP	No	No
AS	Yes	AS	POAR	Yes	AS	DNPLD	Yes	No
AS	Yes	AS	POAR	Yes	AS	PITILD	Yes	Yes
AS	Yes	AS	POAR	Yes	AS	SPOTL	No	Yes
AS	Yes	AS	POAR	Yes	AS	POAR	Yes	Yes
AS	Yes	VER	DNP	No	VER	DNP	No	No
AS	Yes	VER	DNP	No	VER	DNPLD	No	No
AS	Yes	VER	DNP	No	VER	PITILD	No	No

Req Grp Credit Incl Mode	Req Grp Long Descr	Req Credit Incl Mode	Req Print Cntrl	Req Long Descr	Req Line Credit Incl Mode	Req Line Print Cntrl	Req Line Long Descr	Crse or Cond Data
AS	Yes	VER	DNP	No	VER	SPOTL	No	No
AS	Yes	VER	DNP	No	VER	POAR	No	No
AS	Yes	VER	PITILD	No	VER	DNP	No	No
AS	Yes	VER	PITILD	No	VER	DNPLD	No	No
AS	Yes	VER	PITILD	No	VER	PITILD	No	No
AS	Yes	VER	PITILD	No	VER	SPOTL	No	No
AS	Yes	VER	PITILD	No	VER	POAR	No	No
AS	Yes	VER	SPOTL	No	VER	DNP	No	No
AS	Yes	VER	SPOTL	No	VER	DNPLD	No	No
AS	Yes	VER	SPOTL	No	VER	PITILD	No	No
AS	Yes	VER	SPOTL	No	VER	SPOTL	No	No
AS	Yes	VER	SPOTL	No	VER	POAR	No	No
AS	Yes	VER	POAR	Yes	VER	DNP	No	No
AS	Yes	VER	POAR	Yes	VER	DNPLD	No	No
AS	Yes	VER	POAR	Yes	VER	PITILD	No	No
AS	Yes	VER	POAR	Yes	VER	SPOTL	No	No
AS	Yes	VER	POAR	Yes	VER	POAR	No	No
AS	Yes	AS	DNP	No	VER	DNP	No	No

Req Grp Credit Incl Mode	Req Grp Long Descr	Req Credit Incl Mode	Req Print Cntrl	Req Long Descr	Req Line Credit Incl Mode	Req Line Print Cntrl	Req Line Long Descr	Crse or Cond Data
AS	Yes	AS	DNP	No	VER	DNPLD	No	No
AS	Yes	AS	DNP	No	VER	PITILD	No	No
AS	Yes	AS	DNP	No	VER	SPOTL	No	No
AS	Yes	AS	DNP	No	VER	POAR	No	No
AS	Yes	AS	PITILD	Yes	VER	DNP	No	No
AS	Yes	AS	PITILD	Yes	VER	DNPLD	Yes	No
AS	Yes	AS	PITILD	Yes	VER	PITILD	Yes	Yes
AS	Yes	AS	PITILD	Yes	VER	SPOTL	No	Yes
AS	Yes	AS	PITILD	Yes	VER	POAR	Yes	Yes
AS	Yes	AS	SPOTL	No	VER	DNP	No	No
AS	Yes	AS	SPOTL	No	VER	DNPLD	Yes	No
AS	Yes	AS	SPOTL	No	VER	PITILD	Yes	Yes
AS	Yes	AS	SPOTL	No	VER	SPOTL	No	Yes
AS	Yes	AS	SPOTL	No	VER	POAR	Yes	Yes
AS	Yes	AS	POAR	Yes	VER	DNP	No	No
AS	Yes	AS	POAR	Yes	VER	DNPLD	Yes	No
AS	Yes	AS	POAR	Yes	VER	PITILD	Yes	Yes
AS	Yes	AS	POAR	Yes	VER	SPOTL	No	Yes

Req Grp Credit Incl Mode	Req Grp Long Descr	Req Credit Incl Mode	Req Print Cntrl	Req Long Descr	Req Line Credit Incl Mode	Req Line Print Cntrl	Req Line Long Descr	Crse or Cond Data
AS	Yes	AS	POAR	Yes	VER	POAR	Yes	Yes
AS	Yes	VER	DNP	No	AS	DNP	No	No
AS	Yes	VER	DNP	No	AS	DNPLD	No	No
AS	Yes	VER	DNP	No	AS	PITILD	No	No
AS	Yes	VER	DNP	No	AS	SPOTL	No	No
AS	Yes	VER	DNP	No	AS	POAR	No	No
AS	Yes	VER	PITILD	No	AS	DNP	No	No
AS	Yes	VER	PITILD	No	AS	DNPLD	No	No
AS	Yes	VER	PITILD	No	AS	PITILD	No	No
AS	Yes	VER	PITILD	No	AS	SPOTL	No	No
AS	Yes	VER	PITILD	No	AS	POAR	No	No
AS	Yes	VER	SPOTL	No	AS	DNP	No	No
AS	Yes	VER	SPOTL	No	AS	DNPLD	No	No
AS	Yes	VER	SPOTL	No	AS	PITILD	No	No
AS	Yes	VER	SPOTL	No	AS	SPOTL	No	No
AS	Yes	VER	SPOTL	No	AS	POAR	No	No
AS	Yes	VER	POAR	Yes	AS	DNP	No	No
AS	Yes	VER	POAR	Yes	AS	DNPLD	No	No

Req Grp Credit Incl Mode	Req Grp Long Descr	Req Credit Incl Mode	Req Print Cntrl	Req Long Descr	Req Line Credit Incl Mode	Req Line Print Cntrl	Req Line Long Descr	Crse or Cond Data
AS	Yes	VER	POAR	Yes	AS	PITILD	No	No
AS	Yes	VER	POAR	Yes	AS	SPOTL	No	No
AS	Yes	VER	POAR	Yes	AS	POAR	No	No
VER	Yes	ANY	ANY	No	ANY	ANY	No	No

Creating a Requirement Line Item

Access the Line Item page.

The screenshot displays the 'Line Item' page within a software application. At the top, there are five tabs: 'Enrollment Requirement', 'Parameters', 'Line Item' (which is the active tab), 'Line Item Parm', and 'Line Item Detail'. Below the tabs, there is a header bar with 'Find | View All' and navigation controls for 'First', '1 of 1', and 'Last'. The main content area shows the following details:

- Academic Requirement:** 000001137
- Description:** Art 140-142
- Effective Date:** 08/25/1997
- Status:** Active

Below these details, there is a section titled 'Line Item' with its own 'Find | View All' and navigation controls. This section contains:

- A 'Refresh Parentheses' button.
- A 'Line:' field with the value '0010' and '+'/'-' buttons.
- A '*Line Type:' dropdown menu set to 'Course Requirement'.
- A 'Line Name:' text field containing 'Art Course Requirement'.
- A '*Short Description:' text field containing 'Art Course'.
- A 'Description:' text area containing 'Art Course Requirement'.

Line Item page

This page contains the detail line type for a specific academic requirement.

A line type of *Global Limit*; *Global Sequential Restriction*; *Sequential Restriction*; or *Unit, Course or GPA Limit* is enforced only on academic requirements with a Credit Include Mode value of *All Stats*. Requirements with a Credit Include Mode value of *Verify* are not held to these limits.

However, requirement lines with a Credit Include Mode value of *Verify* can use the course list equation to force a global limit or global sequential restriction to apply by subtracting a derived course list with a List Recall Mode value of *Used by Requirement* (as long as the requirement contains the global limit or restriction). A List Recall Mode value of *Used by Requirement* points to a course list that contains all courses that exceed the limit or violate the restriction, so that these courses can be subtracted from a requirement with a Credit Include Mode value of *Verify*. A requirement line with a Credit Include Mode value of *Verify* cannot implement a local restriction because the line might specify a local check instead.

Refresh Parentheses

Click to refresh and display the parentheses after you add new detail lines. If you add new lines and connectors, then the existing display may not show the parentheses in the correct position. (You can also update the display of parentheses by saving the page.) You cannot explicitly set parameters to group detail rows.

If the main connector type is AND, then the system creates partitions where AND is the main connector. For example, if you enter A OR B AND C OR D, then the implied statement is (A OR B) AND (C OR D).

If the main connector type is OR, then the system creates partitions where OR is the main connector. For example, if you enter A OR B AND C OR D, then the implied statement is A OR (B AND C) OR D.

When the connector field is available for a new line, select a value in the AND/OR field to specify how this detail line is connected with the previous detail line. If you select *NONE*, then the field value populates the Connector Type field on the Parameters page.

Line

The system assigns this sequential line number, but you can override it. (Computer-generated line numbers are assigned in increments of 10.) This number determines the order in which the system evaluates the detail lines. When adding a new line, replace the value *NEW* with the next sequential line number.

Line Type

Select the line type of the requirement:

Condition Requirement: Requires conditions that are associated with the student.

The Complement of Line Conditions check box appears on the page for this line type.

If the check box is selected and the conditions that are stated on the Line Item Detail page are true, then false is recorded. If the check box is selected, and any conditions stated on the Line Item Detail page are false, then true is recorded. If the check box is cleared and the conditions stated on the Line Item Detail page are true, then true is recorded.

If the check box is not selected and any conditions that are stated on the Line Item Detail page are false, then false is recorded. For example, if the condition requirement is a cumulative GPA of less than 3.5, and the student has a GPA of 4.0, then the condition is unmet, and false is recorded.

If the check box is selected and the same example applies, then true is recorded because the student does meet the condition (which now requires a cumulative GPA of more than 3.5).

Course Requirement: Specify a course list (static or derived) from which the student must take individual courses. You can specify the number of course units and courses on the Line Item Parameters page.

Global Limit: Takes effect when it is encountered by the audit and affects all requirement groups that use a Credit Include Mode value of *All Stats* or *Excl GPA* that are evaluated after the limit is encountered. The *Global Limit* line type is usually attached to a requirement group that is designated at the career level with a reporting sequence of 1. If a global limit is set at the career level with a reporting sequence of 1 and the lowest requirement number, then it applies to the student's entire audit. However, if the global limit is set at the

plan level with the highest reporting sequence number, then it applies only to the plan requirement groups that are evaluated after this plan and any subplan requirement groups. The limits usually affect courses that are taken from a specific course list, units, or GPA in course requirement lines and specific course lines. For example, you could use this line type to ensure that a student uses no more than 9 units of remedial work toward the total number of units that are required to graduate. In addition, this line type splits courses even if the Enable Splitting check box on the Line Item Parameters page is cleared.

Important! Again, the system applies the global limit to a degree audit only when it is encountered. Establish the limit at the highest level possible (for example, career) or wherever appropriate. Use preconditions as necessary to specify groups within the highest level to which you want to apply the limit.

Global Sequential Restriction: Select to check all courses on the student's record to verify that the student took the courses in the proper sequential order (as specified in the course list). If any courses are out of order, then they are excluded from the entire audit at the academic level (for example, career, program, plan, or subplan) where the restriction is encountered and below. For example, to enforce a particular sequence of courses for the entire audit, attach the restriction requirement to a requirement group at the career level (highest academic structure level and evaluated first) with a reporting sequence of 1. Then the restriction is encountered early in the audit process and applied throughout the remainder of the audit.

Sequential Restriction: Select to check all courses that are used by the stated requirement or other target to verify that the student took the required courses in the correct order. *Used* courses are those courses that are captured by a requirement with a Credit Include Mode value of *All Stats*. The system does not evaluate courses that are captured by requirements with a Credit Include Mode value of *Verify*. (You define local targets on the Line Item Detail page. In the absence of a local target, the default target is the current requirement.) If the courses that are taken do not match the specified sequence in the course list, then the out-of-sequence courses are disallowed in the course requirement lines and specific course lines, but are available for use by other requirements. The sequential restriction is different from a global sequential restriction in that it applies to a specific requirement, rather than to the entire audit.

See [Appendix B, "Sequential Restriction Examples,"](#) page 211.

Note. Local limits and sequential restrictions are limits that apply to a particular requirement or group of requirements. A local target (or requirement line target) is a set of requirements that is limited by the local limit or restriction. The system checks local limits and restrictions against targets.

Specified Courses: Select to specify a course list from which the student must take one of each course that is represented in the course list. For example, if the course list consists of English 100, History 100, and a wildcard for math, then the student must complete a minimum of one English 100, one History 100, and one math course regardless of the minimum course or unit parameters set at the line item level. The Minimum Units and Minimum Courses fields on the Line Item Parameters page refer to the number of times that the student must take each course in the course list. Leave these fields blank to require one instance for each course. Insert a value to require the

student to take each course in the course list more than once. The Minimum Units and Minimum Courses fields on the Requirement Parameters page refer to the overall number of courses or units that the student must complete for the entire requirement, including all requirement lines.

Unit, Course or GPA Limit: Select to check courses that are used by the requirement in which it resides or another local target to enforce maximum units, courses, or GPA limits. If the student exceeds the unit, course, or GPA limit, then the courses are disallowed in the course requirement lines, but are available for use by other requirements. The default target of the limit is the current requirement. To change the target, create an intersection on the Line Item Detail page that includes a derived course list field value of *Used By*. The requirement, requirement groups, academic programs, or academic plans that are intersected with the courses to be limited then become the target.

For example, suppose that a requirement is not intersected with a derived course list value of *Used By*. The Parameters page specifies that a minimum of 9.0 units is required. Line 10 needs three philosophy courses and Line 20 uses a line type of *Unit, Course or GPA Limit* with a maximum of one course and a maximum of 3 units. Line 20 uses a course list of lower division philosophy courses. As a result, a student could use only one course of lower division philosophy to satisfy any of the lines in this entire requirement.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Pre-Condition

Select a value for the precondition filter. You use a precondition to restrict the use of a *requirement line* to a particular type of student. For example, if a requirement line has a precondition of *Cumulative Grade Point Average Greater Than 3.00*, then this requirement line applies only to students with a cumulative grade point average that is greater than 3.00. If this precondition is false for a student, then the system does not consider the requirement line during analysis; it analyzes and reports information only if the precondition is true.

Important! A student with a null set of entities (for example, no student group) is always considered true for all plurals of that entity for both *in* and *not in* because the null set is included in all entity groups and all entity group complements (the student is found true as being both *in* and *not in* student groups).

None (Default): Select to set no precondition.

Note. If this field contains a value other than *None*, then additional fields are available to complete the precondition statement. Operators for a precondition statement include *< or =*, *> or =*, *Equal*, *Greater*, *In*, *Less*, *Not Equal*, and *Not In*.

Academic Level: Select to specify a student's year of study. Values include *freshman* and *sophomore*. The system evaluates this value against the student based on the as of date that you specify at run time.

Academic Plan: Select to specify a student's academic plan (for example, major or minor) within the academic program. If the student has only one plan, then *Academic Plan* and *Primary Academic Plan* reference the same plan.

Academic Plans: Select to specify that all of a student's plans are part of the equation.

Academic Program: Select to specify a student's academic program, primary or otherwise, as defined on the Student Program page. If the student has only one program, then *Academic Program* and *Primary Academic Program* reference the same program.

Academic Programs: Select to specify that all of a student's academic programs are part of the equation.

Academic Standing: Select to specify a student's academic standing at the institution. For example, values might include *good standing*, *probation*, and *dismissal*. You define values in the Academic Standing Table page. The system evaluates this value against the student based on the as of date that you specify at run time.

Academic Sub-Plan: Select to specify a student's subplan.

Academic Sub-Plans: Select to specify that all of a student's subplans are part of the equation.

Cumulative Grade Point Average: Select to specify a student's cumulative grade point average (derived from the student's term history cumulative statistics, in conjunction with the processing as of date).

Primary Academic Plan: Select to specify a student's primary academic plan, which is designated by the lowest plan sequence number on the Student Plan page. For example, under a program of LAU, a student might have two plans, PSYCH and CLASSICS MINOR. If PSYCH has a plan sequence number of 10 and CLASSICS MINOR has a plan sequence number of 20, then PSYCH is the primary academic plan. On the Student Plan page, the primary career is designated as student career number 0.

Important! The primary academic plan is designated by the lowest plan sequence number on the Student Plan page, and the primary academic program is designated by the lowest career sequence number on the Student Program page. However, if a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is that plan with the lowest plan sequence number under the program with the lowest student career number.

For example, suppose that under a program of LAU (attached to a student career number of 0), a student has a plan of PSYCH with a plan sequence number of 10. The same student has a plan of ART with a plan sequence number of 10 under a program of FAU (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan. In this example, the primary plan is PSYCH, which is tied to a student career number of 0 through the LAU program.

Primary Academic Program: Select to specify a student's primary academic program, which is the program designated by the lowest career sequence number. (On the Student Program page, the primary career is designated as Student Career Nbr 0 [student career number 0].)

Student Group: Select to evaluate a student's student group. For example, values might include *Athlete* or *Veteran*. You define values in the Student Group Table page.

Student Groups: Select to specify that all of a student's student groups are part of the equation.

Table Entry: Select to specify that a dynamic condition that you created in the Define Dynamic Condition component is compared against the student (for example, Student Group = Athlete AND Academic Level = First Year).

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. However, you can use a condition specification as a precondition on the Line Item page. You use the Define Dynamic Condition component to define new condition specifications. On the Condition page, you establish the description, academic institution, and connector type of the new condition specification. After you have created a condition specification, , you can use it as a condition line type in a requirement; as a condition group line type in a requirement group; or as a precondition on the Requirement Group, Requirement, or Requirement Line Item page.

Specifying Requirement Line Item Parameters

Access the Line Item Parameters page.

Using this page, you can:

- Determine the number of times that a student takes a course.
- Split units and courses.
- Control what kind of requirement line item information is printed on the degree audit report.
- Define an option that prints the remaining courses that are available to fulfill the requirement on the advising report.

Requirement | **Parameters** | **Line Item** | **Line Item Parameters** | **Line Item Detail**

Find | View All 1 of 1

Academic Requirement: 000001096 **Description:** ENG Distribution
Effective Date: 01/01/1900 **Status:** Active

Line Item Parameters Find | View All 1 of 3

Line Nbr: 0010 **Description:** Comparative Lit

Minimum GPA:
Minimum Units:
Minimum Courses:
Maximum Units Allowed:
Maximum Courses Allowed:
Min Grade Points/Unit:

***Course Ranking Scheme:** Chronological ***Reporting:** Always Report
***Credit Include Mode:** All Stats ☐ **Override Standard Set Logic**

Background Key

Line Nbr: 0010 **Description:** Comparative Lit

☐ **Count Attempts**
☒ **Display Select Line**
☐ **Enable Splitting**

Print Control: Print if there is line detail

Line Item Parameters page

This page contains line item parameters for the specified academic requirement line. The fields that are available depend on the line type that you specify on the Line Item page.

This table shows the fields that are available based on the line type selected:

Requirement Line Item - Line Type	Elements That Appear
Condition	Reporting, Print Control
Course Requirement	Minimum GPA, Minimum Units, Minimum Courses, Maximum Units Allowed, Maximum Courses Allowed, Minimum GP/Unit, Course Ranking Scheme, Reporting, Credit Include Mode, Override Standard Set Logic, Count Attempts, Display Select Line, Enable Splitting, Print Control
Global Limit	Minimum GPA, Maximum GPA Allowed, Maximum Units Allowed, Maximum Courses Allowed, Course Ranking Scheme, Reporting, Override Standard Set Logic, Count Attempts, Print Control

Requirement Line Item - Line Type	Elements That Appear
Unit, Course or GPA Limit	Minimum GPA, Maximum GPA Allowed, Maximum Units Allowed, Maximum Courses Allowed, Course Ranking Scheme, Reporting, Override Standard Set Logic, Count Attempts, Print Control
Global Sequential Restriction	Reporting, Count Attempts, Print Control
Sequential Restriction	Reporting, Count Attempts, Print Control
Specified Courses	Minimum GPA, Minimum Units, Minimum Courses, Maximum Units Allowed, Maximum Courses Allowed, Minimum GP/Unit, Course Ranking Scheme, Reporting, Credit Include Mode, Count Attempts, Display Select Line, Enable Splitting, Print Control

The values that you enter on this page take precedence over the parameters that you entered at the requirement and requirement group levels. For example, suppose that the line item parameters require 6 units, but the requirement parameters need only 3 units. The audit engine searches for 6 units.

Note. To create a line that evaluates courses but does not restrict them from use in other lines or requirements, use a Credit Include Mode value of *Verify*. The requirement and requirement group Credit Include Mode value can be *All Stats*. Remember that the lowest level (or the line) takes precedence.

Minimum Units Enter the minimum total units that are required to satisfy this line number.

Minimum Courses Enter the minimum number of classes that are required to satisfy this line number.

Note. If the line type is *Specified Course*, then you can leave the Minimum Courses field blank, and one of each class in the course list will be required; or you can enter a higher value to require multiples of each course in the course lists. Regardless of the field value, this line type requires a course for each course sequence in the course list that is identified on the Line Item Detail page.

Minimum GPA Enter the minimum overall GPA requirement for classes that are selected to satisfy this line number. For example, if a requirement states that the student needs to take four Math 100-level classes with an overall GPA of 3.000 for a total of 12 units, then enter 3.000 in this field.

If the requirement line is a limit, then this value is a minimum standard for the courses that you want to limit. Enter the minimum GPA that is required for any courses that are allowed by this limit. For example, if only one music course can be used in the audit, and that course must have a grade of C or better, then enter 2.000 in this field.

Maximum GPA Allowed Enter the maximum GPA that is allowed for any courses that are allowed by this limit.

Important! Maximum GPA Allowed appears on the page if the Credit Include Mode value is *Verify*. Enter the maximum overall GPA that is allowed for classes that are selected to meet this line number.

Maximum Units Allowed Enter the maximum total units that are allowed for this line number. If the line type is a limit and you do not supply a value, then 0 units are allowed.

Maximum Courses Allowed Enter the maximum total courses that are allowed for this line number.

For limits:

If you do not enter values in the Maximum Units Allowed and Maximum Courses Allowed fields, then the default value for each field is 0. If you leave either field blank, then the limit excludes all courses from the course list because a blank field has a value of 0.

For example, to limit all courses in a course list (as indicated on the Line Item Detail page), leave both fields blank. When both field values are 0, all courses in the course list are ineligible for use by an academic requirement with a Credit Include Mode value of *All Stats*. (Requirements with a Credit Include Mode value of *Verify* do not enforce limits or restrictions.)

In another example, to limit courses in the course list to 3 units, enter a value of at least 3 in the Maximum Units Allowed field and enter a value of at least 1 in the Maximum Courses Allowed field.

Another example: If a line with a Credit Include Mode of *Verify* needs a minimum of 5 units and a maximum of 100 units, then if the audit picks up 101 units, the line is not satisfied, just as if only 4 units were picked up.

For nonlimits:

If you do not enter values in the Maximum Units Allowed and Maximum Courses Allowed fields, then the default value for each field is 999.0. Also, the system uses whichever is *less*: the value in the Maximum Units Allowed field or the value in the Maximum Courses Allowed field. Therefore, if the Maximum Units Allowed value is 4 and the Maximum Courses Allowed value is 999.0, then only 4 units are allowed before the limit is reached.

Min Grade Points/Unit
(minimum grade points/unit) Enter the minimum grade points per unit that are needed to satisfy this line number. (When you run an audit, if the transcript type value on the Request Header page does not exclude in-progress work, as specified on the Basic Data page, then all in-progress work is included on the transcript. If this field contains a value, then the system ignores that value if the requirement is in progress.) This field value does not override the minimum grade points per unit value that you set on the Course List Parameters page.

Reporting Select the conditions under which the system reports a specific line number on the degree audit report:

Always Report: Select to always report the requirement line, regardless of the completion status.

Report Only When Not Satisfied: Select to report the requirement line only if the student did not successfully satisfy the parameters of the requirement line. For example, you could use this value to report probationary status.

Report Only When Satisfied: Select to report the requirement line only if the student successfully completes the parameters of the requirement line. For example, you could use this value to report honors status.

Except for *Always Report*, every reporting value acts as a postcondition.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Print Control

This field controls whether the system prints the Long Description field (from the Line Item page) and the required parameters (on the Line Item Parameters page) on the degree audit report. This field controls only the requirement line level, not the requirement group or requirement level. (Because a line type of *Global Limit* or *Unit, Course or GPA Limit* is always considered satisfied and appears in plain text on the audit report, no line item parameters are printed.)

Depending on the line type, values are:

Print on Audit Reports: Select to always print line information (the Long Description and required parameters) on the report.

Do Not Print: Select to never print the line information (as well as line item parameter information) on the report.

Do Not Print Line Detail: Select to specify that if line detail is used to satisfy this requirement, then the information is not printed on the report.

Print If There is Line Detail: Select to specify that if line detail is used to satisfy this requirement, then the information is printed on the report in addition to the requirement information.

Skip Printing of This Level: Select to not print the requirement line information on the report.

The system does not use this field in analysis; it affects the printout format only.

Credit Include Mode

Select how courses in the requirement line are included in the degree audit:

All Stats: Select to report all course statistics.

Excl GPA: Select to exclude courses in this requirement line from the GPA. You commonly use this value at the lower level of requirement or at the requirement line level to prevent the system from using the GPA from certain courses at the higher level of requirement.

Verify: Select to specify that the system verifies that the course was taken, but that credit is not recorded, so that the course can be used elsewhere in the audit. However, the course is counted toward requirement line completion. You more commonly use this value in requirements that have overall unit requirements (such as completion of 120 units to graduate), required term unit loads, or required academic standing status.

Note. When the Credit Include Mode value is *Verify*, the parameters (Minimum Units and Maximum Units Allowed values) act as boundaries for determining a truth value. For example, if Minimum Units is *6.0*, Maximum Units Allowed is *15.0*, and the student has fewer than 6 or more than 15 units, then the truth value is *false*. If the student is within this range, then the truth value is *true*. *Verify* accepts and reports on all courses that match the course list and transcript (even if they are above or below the limits). However, an *All Stats* or *Excl GPA* line uses the minimum or maximum parameters to capture and analyze only what is within the range, freeing unused courses to be used elsewhere.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Override Standard Set Logic

Select to specify whether each line item detail must contain a List Include Mode value, a course list specification, or both.

Important! The default status of this check box is clear. You should not select it unless you completely understand nonstandard or reverse logic. Only experienced users should use this option. This check box appears on the Line Item Parameters page, but it affects how fields are evaluated on the Line Item Detail page.

Count Attempts

Select to count all attempts at a course during the degree audit process. If you select this check box, then a course becomes a candidate for satisfying a requirement even if the student did not receive earned credit. For example, if a student fails Biology 101 and then passes it on the second attempt, the student actually took the class twice, for a course count of two. The Line Item Parameters page uses this course count to satisfy minimum and maximum course requirement parameters. In addition, the system includes the GPA as well as units and course count in the degree audit. However, if the course has a repeat code attached to it that indicates that the course is not included in the GPA, then the repeat code is obeyed. (You establish repeat codes on the Repeat Scheme Table page.)

If the Line Detail Type value on the Line Item Detail page is *DLST* (derived course list), then all attempts at a course are counted as if the Count Attempts check box is selected.

Display Select Line

Select to display all courses that a student can take to fulfill an outstanding requirement on the academic advising report. (Wildcard courses are reported as such: SOC 1##, HIST 24#, or ****150.) For example, if you select this check box and the audit shows that the humanities requirement of 6 hours is not satisfied, then all courses that the student can take to fulfill the requirement are listed under the requirement line long description and the line item parameters in the report.

The system displays on the advising report only those courses from the course list that have a status of *Active* in the course catalog on the date that you run the advising report, regardless of the as of date that you specify at run time.

The system accepts inactive courses from the course catalog and previous versions of the course ID, if the student took the course when it was active. The system simply does not display inactive courses on the advising report as viable options for future enrollment.

To view historical course list information, use the summary pages.

If you select the Override Standard Set Logic check box, then the Display Select Line check box is unavailable for entry. This check box is also unavailable if the Print Control value that you select on the Line Item Parameters page is other than *Print on Audit Reports* or *Print If There is Line Detail*.

Enable Splitting

Select to split units during the processing of this line number. For example, if you select this check box, and a requirement calls for 10 units, but a student took four 3-unit courses, then the units are split, and only 10 units are used to satisfy the requirement. The remaining 2 units can be used to satisfy another requirement. If this check box were cleared, then all 12 units would have been used to satisfy the 10-unit requirement.

If the Credit Include Mode value is *Verify* on the Line Item Parameters page, then this check box is unavailable for entry.

Important! To prevent overmatching (more credit units than the required minimum are applied), select the Enable Splitting check box. On the Line Item Parameters page, do not enter a value in the Maximum Units Allowed field, but enter a value only in the Minimum Units field. (The Maximum Units Allowed value is an alternative to splitting and is intended to exclude entire courses. With splitting enabled, do not use the Maximum Units Allowed field.)

Warning! If you select the Enable Splitting check box, then both units and courses are split. Every requirement is a unit, hour, and credit requirement or a course requirement. Select this check box for unit requirements only.

Using the Override Standard Set Logic Check Box

If the Override Standard Set Logic check box is not selected:

- Every detail line except the first one must have a value in the List Include Mode field.
Only three operators, *U (Union with)*, *N (Subtract from)*, and *I (Intersection with)* are available.
- If the detail line is a course list, then the List Include Mode and Course List fields on the Line Item Detail page must contain values except as specified in the preceding item.
- If the detail line is a derived course list, then the List Include Mode and List Recall Mode fields on the Line Item Detail page must contain values except as specified in the first item in this list.
- Standard logic (to combine this list with the previous list) is in effect.

For example, standard set logic acts as follows:

Line Detail Sequence 1: A.

Line Detail Sequence 2: intersect B.

Line Detail Sequence 3: union C.

Line Detail Sequence 4: subtract D.

The formula is ((AIB) U C) N D.

If the Override Standard Set Logic check box is selected:

- Any detail line can have a blank List Include Mode field.

The List Include Mode field lists four operators because the *Complement* list operation is allowed.

- If the detail line is a course list, then either the List Include Mode field or the Course List field (but not both) on the Line Item Detail page can be blank.
- If the detail line is a derived course list, then either the List Include Mode field or the List Recall Mode field (but not both) on the Line Item Detail page can be blank.

Nonstandard logic means that lists are combined based on the methodology that is known as Reverse Polish Notation.

For example, override standard set logic acts as follows:

Line Detail Sequence 1: A.

Line Detail Sequence 2: B.

Line Detail Sequence 3: intersect.

Line Detail Sequence 4: C.

Line Detail Sequence 5: D.

Line Detail Sequence 6: subtract.

Line Detail Sequence 7: union.

The formula is (ABI) (CDN) U.

Note. When the Override Standard Set Logic check box is selected, you must place each course list (set) and operator on a separate detail line to obtain consistent, accurate audit results. (You do not have to supply both a course list and an operator; only one is required.) If you place the operator and a list on the same line, then the previous set is affected.

For example, in standard logic, a specific notation might interact like this:

A union B intersect C subtract D.

In override standard logic, the same notation would interact like this:

A B union C intersect D subtract.

In the first method of notation, the operator is between the two sets that it affects:

A union B would produce a result X. Then X would intersect with C, producing a result Y. This result Y would then subtract D, producing a result Z. In the second method of notation (override standard logic), the operator affects the previous two sets (left to right). The union takes effect on A and B, producing a result X. Then the intersect affects the previous two sets, X and C, producing a result Y. Then subtract affects the final two sets, Y and D, producing a result Z. The result of each method of notation is the same Z, but the second method provides far more functionality.

Here is another example:

Math courses intersected with 200-level courses intersected with transfer courses unioned with math courses intersected with 100-level courses intersected with transfer courses.

This example produces one list of 100- and 200-level transfer math courses. To create this list, use override set logic:

Line Detail Sequence 1: math courses.

Line Detail Sequence 2: 200-level courses.

Line Detail Sequence 3: intersect.

Line Detail Sequence 4: transfer courses.

Line Detail Sequence 5: intersect.

Line Detail Sequence 6: math courses.

Line Detail Sequence 7: 100-level courses.

Line Detail Sequence 8: intersect.

Line Detail Sequence 9: transfer courses.

Line Detail Sequence 10: intersect.

Line Detail Sequence 11: union.

Because each item is on a separate line detail sequence, the operator takes effect on the previous two sets: Line Detail Sequence 1 intersected with Line Detail Sequence 2 produces 200-level math courses. That list is intersected with transfer courses, producing a list of 200-level transfer math courses, labeled X. Because lines 6 and 7 are two sets, line 8 takes effect on those two lines (not X), so line 6 intersect line 7 produces 100-level math courses. Line 10 then intersects transfer courses (line 9) with the previous set (100-level math courses) to produce a new result: 100-level transfer math courses, labeled Y. Line 11 now takes effect on the previous two sets X and Y to produce one list of 100- and 200-level transfer math courses.

However, if the previous example contained course lists and operators on the same line, then the effect would be:

Line Detail Sequence 1: math courses (A)

Line Detail Sequence 2: intersect 200-level courses (B)

Line Detail Sequence 3: intersect transfer courses, labeled C

Line Detail Sequence 4: intersect math courses, labeled A

Line Detail Sequence 5: intersect 100-level courses, labeled D

Line Detail Sequence 6: intersect transfer courses, labeled C

Line Detail Sequence 7: union

This example would be processed as follows:

A intersect B = 200-level math courses, labeled X.

X intersect C = 200-level transfer math courses, labeled Y.

Y intersect A = math courses (all of which are 200-level), labeled W.

W intersect D = nothing (because there are no 100-level courses), labeled Z.

Z intersect C = nothing, labeled R.

Union = nothing.

Setting Up Requirement Line Item Detail

Access the Line Item Detail page.

The screenshot displays the 'Line Item Detail' page. At the top, there are tabs: Requirement, Parameters, Line Item, Line Item Parameters, and Line Item Detail. The 'Line Item Detail' tab is selected. The page shows the following information:

- Academic Requirement:** 000001096
- Description:** ENG Distribution
- Effective Date:** 01/01/1900
- Status:** Active
- Line Item:** Line Nbr: 0010, Descr: Comparative Lit
- Line Item Detail:**
 - *Line Detail Sequence: 1
 - *Line Detail Type: CLST (Course List)
 - Course List: 000000080 (Comparative Lit Courses)

Line Item Detail page

Depending on the line type, different fields and field values are available on this page. Each line must have at least one line item detail. You can have multiple rows of line detail under a single line number.

Line Detail Sequence

This sequential number is automatically assigned to a specific line detail. You can have multiple line detail sequences under a single line number.

Line Detail Type

CLST (course list): Specify a group of courses that can be used to satisfy an academic requirement. These courses are defined in the *COURSE_LIST* table from the course catalog. A course list line detail type processes repeat codes differently from a derived course list line detail type. (You define repeat codes in the Repeat Scheme table.) For requirements that use a course list line detail type, the system picks up only courses that earn credit. As a result, if you set up the repeat scheme to allow all attempts of a course to earn credit, then multiple attempts of the same course are used to satisfy the requirement. For requirements that use a derived course list line detail type, the system picks up all courses, even those that do not earn units.

Note. The degree audit does not print the repeat code with the course, but prints it on the transcript portion of the audit.

Warning! When the line detail type is *CLST*, the advisement engine does not pick up courses with no earned credit for the evaluation of the requirement because courses that do not earn credit typically do not satisfy degree requirements. However, you can select the Count Attempts check box on the Line Item Parameters page to enable course lists to include courses that do not earn credit. When these attempted courses are counted, the units are used to satisfy any unit requirement parameter that was set.

If a line detail type of *CLST* is intersected with a line detail type of *DLST* (derived course list), then the characteristics of the course list line detail type prevail, and no courses that do not earn credit are pulled into the requirement.

DLST: Specify a subset of a student's transcript or academic record that can be used to satisfy an academic requirement.

Warning! When the line detail type is *DLST*, the advisement engine pulls in units of classes with a grade of no earned credit. For example, to establish an overall GPA requirement for all courses, you can set up a requirement with a line detail type of *DLST* and a List Recall Mode value of *All Courses* with a minimum GPA of 2.000. The audit displays every course on the student transcript, even those that have not earned credit, to properly evaluate the true overall GPA. You should consider the units that are shown in this requirement as the units that are attempted, because those values are used to calculate the GPA. To establish a requirement for overall units by using a line detail type of *DLST* and a List Recall Mode value of *All Courses*, the units that are attempted (which are displayed for courses that did not earn credit) are used to satisfy any unit requirements. To eliminate courses that do not earn credit from this requirement, establish a minimum grade point per unit on the Line Item Parameters page.

COND (condition): Specify a condition that the student must satisfy, such as a required academic standing, milestone, or cumulative grade point average.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

List Include Mode

Select how a previous line detail sequence interacts with a new line detail sequence. (This field is available for every line detail except the first one.) To see this field, place the cursor in the Line Detail Sequence field and insert a new row. List Include Mode values include *Y* (union), *I* (intersection), and *N* (subtraction).

Note. You cannot select a List Include Mode value other than *Y* if you selected the Display Select Line check box on the Line Item Parameters page. If you select the Override Standard Set Logic check box on the Line Item Parameters page, then the list include mode values include *C* (complement).

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Condition Requirement Line Type Fields

Academic Institution	Displays the academic institution that you defined on the Requirement page. The system uses this field for prompting, not for analysis. Each academic requirement is associated with only one academic institution.
Academic Career	Enter the academic career that is associated with this condition. (The value in this field may not match the academic career that is specified on the Requirement page.)
Condition Code	Select a condition code to specify which field in the database this condition checks. For example, Academic Level, Academic Plan, Academic Program, and Academic Sub Plan are condition codes. <i>None:</i> Select to set no field value.

Academic Level: Select to specify a student's year of study (for example, *freshman* and *sophomore*). The system evaluates this value against the student based on the as of date that you specified at run time.

Academic Plan: Select to specify a student's plan (for example, major or minor) within the academic program. *Academic Plans* indicates that all of a student's plans are part of the evaluation.

Academic Program: Select to specify a student's academic program.

Academic Programs: Select to specify that all of a student's programs are part of the evaluation.

Academic Standing: Select to specify a student's standing at the institution. (For example, values might include *good standing*, *probation*, and *dismissal*. You define values on the Academic Standing table.) The system evaluates this value against the student based on the as of date that you specify at run time.

Academic Sub-Plan: Select to specify a student's subplan.

Academic Sub-Plans: Select to specify that all of a student's subplans are part of the evaluation.

Cumulative Grade Point Average: Select to specify a student's cumulative grade point average (derived from the student's term history cumulative statistics, in conjunction with the processing as of date).

Primary Academic Plan: Select to specify a student's primary academic plan, which is the plan designated by the lowest plan sequence number on the Student Plan page. (For example, under a program of LAU, a student might have two plans, PSYCH and CLASSICS MINOR. If PSYCH has a plan sequence number of 10 and CLASSICS MINOR has a plan sequence number of 20, then PSYCH is the primary academic plan. On the Student Plan page, the primary career is designated as student career number 0.)

Important! The primary academic plan is designated by the lowest plan sequence number on the Student Plan page, and the primary academic program is designated by the lowest career sequence number on the Student Program page. However, if a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is that plan with the lowest plan sequence number under the program with the lowest student career number.

For example, suppose that under a program of LAU (attached to a student career number of 0), a student has a plan of PSYCH with a plan sequence number of 10. The same student has a plan of ART with a plan sequence number of 10 under a program of FAU (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan. In this example, the primary plan is PSYCH, which is tied to a student career number of 0 through the LAU program.

Primary Academic Program: Select to specify a student's primary academic program, which is the program designated by the lowest career sequence number. (On the Student Program page, the primary career is designated as Student Career Number 0.)

Student Group: Select to specify a student's group. (For example, values might include *athlete* and *veteran*.) You define values on the Student Group Table page.

Student Groups: Select to specify that all of a student's groups are part of the evaluation.

Table Entry: Select to specify students with this dynamic condition, which you previously created in the Define Dynamic Condition component).

Note. When you enter a Condition Code value, the Condition Operator and Condition Data fields appear on the page. If the Condition Code is *Table Entry*, then only the Condition Data field is available for entry.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Condition Operator

Specify the type of comparison to be applied to the condition data. Condition operators are: *Equal*, *None*, *< or =*, *> or =*, *Greater*, *In*, *Not In*, *Less*, and *Not Equal*. (*None* converts to *Equal*.)

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Condition Data

Select the condition data that specifies the value to be checked against the condition code. Specific academic plans and programs as well as dynamic conditions are condition data values. If the condition code is *Table Entry*, then select a previously created dynamic condition (a condition specification) from the field.

Course List Line Detail Type

Course List

Specify a group of classes that make up a course of study, or select a course list from the available course list numbers.

View

Click to access the Course List Summary page, where you can review the course list details.

Derived List Line Detail Type

List Recall Mode

If the line detail type is *Derived List*, then select a list recall mode to specify the conditions that are used to select courses from the student's transcript:

None: Select to specify no field value.

2-year Institution Transfer Courses: Select to specify external transfer course credit from a two-year institution.

Note. The Advisement School Type field on the School Type Table page contains the value that drives the derived lists in academic advisement. Each school type can belong to an advisement school type. On the School Data page, you can identify a school as a two-year or four-year institution.

4-year Institution Transfer Courses: Select to specify all external transfer course credit from a four-year institution (as defined on the School Type Table page).

All Courses Used: Select to use all courses to satisfy requirements where the Credit Include Mode value on the Line Item Parameters page is *All Stats* or *Excl GPA*. This field value retrieves all courses that are used *prior to* the requirement. (*Used* means captured. Verified courses are not picked up.)

Important! To ensure that all courses are considered during an audit, specify a requirement group reporting sequence number of 900 or greater.

All Courses: Select to specify all courses on a student's transcript for all careers.

Courses in Target Career: Select to specify all courses (including internally transferred courses) that the student takes in the career that is specified by the target requirement group of this requirement. For example, if a requirement group is specified as an undergraduate career requirement and points to this requirement line item detail, then the target career is *Undergraduate*. (During an audit, the advisement engine uses all courses that a student takes under all active careers. Also, all transfer credit, regardless of career and program to which it was posted, can be used to satisfy the requirements of all active careers. If transfer work is allowed in the requirement, then all transfer credit that is posted to the target career is included in this list. To restrict a dual-career student from using courses that are taken in one career to satisfy requirements in both careers, use the List Recall Mode value *Courses in Target Career* to block the cross-sharing of courses from one career to another.)

Credit with No Designation: Select to specify all courses with no requirement designation.

Grade Category: Select to assign to all courses a grade that belongs to a particular grade category. (When you enter this field value, the Reference Data field becomes available to record the actual grade category prompt value.) To create a grade category prompt value, use the Grade Category Table page.

Include in GPA Courses: Select to specify all courses that are completed with a grade that is defined on the Grading Scheme Table page as *Include in GPA*.

Internal Transfer Credit: Select to specify equivalents that are awarded by the course credit system with a source type of internal. Courses that are transferred internally are selected from one career and have course equivalents that are applied to another career, program, or plan. External course credit, test credit, and other credits are not included. You use this field value to differentiate internally transferred courses from regularly enrolled courses. (Users who internally transfer courses and use the derived course list field value of *Courses in Target Career* can subtract internally transferred courses that are identified with the target career.) When courses are printed on the advisement audit, internally transferred courses are coded as *IT* (internally transferred). Previously, these courses were coded as *EN* (Enrolled).

Other Credit: Select to specify equivalents that are awarded through the Other Credits component.

Taken After Limit (#Units) (taken after limit [number of units]) and *Taken Before Limit (#Units)* (taken before limit [number of units]): Select to specify

courses that the student takes after or before a unit limit, respectively. Enter the unit limit in the Quantity field. (The system evaluates units in chronological order.) For example, enter 60 to restrict courses to those taken after 60 units. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether the credit is valid for the particular derived course list.

Note. The term-related values for List Recall Mode refer to terms in which the student was enrolled in at least one course. Terms that the student did not attend are of no consequence.

Taken Before Term in Residence Nbr (taken before term in residence number): Select to count the courses that the student took before the term that is indicated. (This value pulls in home courses as well as transfer courses taken before the term that is specified.) Enter the number of terms in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Warning! The term *value* as used here is not related to or based on the value that is used in the Term Activation component. Academic Advisement bases its calculation of term on the number of terms in which a student was or is enrolled in at least one course. This value is assigned at the start of a term, not upon completion.

Taken Before Term Number: Courses that the student took before the term number that appears in the Quantity field. Terms are counted starting with the first term in which a student is enrolled. For example, term 1 is the student's first term at the university and term 3 is the third term. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Consecutive (#Terms) (taken in consecutive [number of terms]): Select to specify how many terms in consecutive order are to be checked. Enter the number of terms in the Quantity field. (For a student, consecutive terms are defined as consecutive enrolled terms. For example, if a student is enrolled in spring and fall classes but not in summer classes, then the student's spring and fall classes are considered as consecutive.) When selecting a number of terms, the audit creates a vector of lists.

For example, if the engine is searching for three courses that were taken in two consecutive terms, then the results could be three courses from fall 1997 and spring 1998, three courses from spring 1998 and fall 1998, three courses from fall 1998 and spring 1999, and three courses from spring 1999 and fall 1999. In this example, five terms were retrieved with a total of 12 courses selected. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating

transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Last (#Terms) (taken in last [number of terms]): Select to specify how many consecutive terms are to be checked. These terms begin with the most recent and go back in time; for example, fall 1996, summer 1996, spring 1996. Enter the number of terms in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Last (#Units) (taken in last [number of units]): Select to specify how many consecutive units to check. These units begin with the most recent and go back in time; for example, first fall 1996, then summer 1996, and then spring 1996. Enter the number of units in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Last Graded (#Terms) (taken in last graded [number of terms]): Select to specify how many consecutive graded terms are to be checked. These terms begin with the most recent and go back in time. (For example, fall 1996, summer 1996, spring 1996.) Enter the number of terms in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken While in Residence: Select to specify home courses that are taken while the student is in residence regardless of career.

Test Credit: Select to specify course equivalents awarded through the Test Credits component.

Transfer Credit: Select to specify credit that is transferred in from an external institution. Test credit, other types of credit, and internally transferred coursework are not included. All transfer credit, regardless of career and program to which it is posted, can be used to satisfy the requirements of all active careers. You use the Course Credits component to input this transfer credit into the system.

Note. The Advisement School Type field on the School Type Table page contains the value that drives the derived lists in academic advisement. Each school type can belong to an advisement school type. On the School Data page, you can identify a school as a two- or four-year institution.

Used by Academic Plans and *Used by Academic Programs:* Select to include all courses that are used by requirement groups in the current audit defined to the plan level or program level, respectively. (*Used By* means used by an *All Stats* or *Exclude GPA* requirement. Verified courses are not picked up.)

Note. If a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is the plan with the lowest plan sequence number under the program with the lowest student career number.

For example, suppose that under a program of LAU (attached to a student career number of 0), a student has a plan of PSYCH with a plan sequence number of 10. The same student has a plan of ART with a plan sequence number of 10 under a program of FAU (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan. In this example, the primary plan is PSYCH, which is tied to a student career number of 0 through the LAU program.

Used by Primary Academic Plan: Select to include all courses that are used by the requirement groups that point to the student's primary academic plan, which is the plan designated by the lowest plan sequence number on the Student Plan page. (For example, under a program of LAU, a student might have two plans, PSYCH and CLASSICS MINOR. If PSYCH has a plan sequence number of 10 and CLASSICS MINOR has a plan sequence number of 20, then PSYCH is the primary academic plan. On the Student Plan page, the primary career is designated as Student Career Nbr (student career number) 0.) *Used By* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

Used by Primary Academic Program: Select to include all courses that are used by the requirement groups that point to the student's primary academic program, which is the program designated by the lowest career sequence number. (On the Student Program page, the primary career is designated as student career number 0.) *Used By* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

Used by Requirement Group: Select to specify all courses that are used by a specific requirement group. Enter the appropriate requirement group in the Requirement Group field. If the requirement group has two effective-dated rows, then the advisement engine selects a row based on the student's requirement term for that academic level (for example, program or plan). If the Ignore Missing Target check box is selected and a line detail type of *DLST* points to a requirement group that does not exist for the student because of an unsatisfied precondition, then a false does not occur. If the check box is not selected and a line detail type of *DLST* points to a requirement group that does not exist for the student because of an unsatisfied precondition, then a false does occur. *Used By* means used by an *All Stats* or *Excl GPA* requirement group. Verified courses are not picked up.

Used by Requirement: Select to specify all courses that are used by a specific requirement. Enter the appropriate requirement in the Academic Requirement field. (A requirement line number in the Line Nbr [line number] field is optional. If you leave this field blank and there are multiple lines in the requirement, then all lines are evaluated.) If the requirement has two effective-dated rows, then the effective-dated row that is selected by the advisement engine is based on the student's requirement term for that academic level (for example, program or plan). If you select the Ignore Missing Target check box and a line detail type of *DLST* points to a requirement that does

not exist for the student because of an unsatisfied precondition, then a false does not occur. If you do not select the check box and a line detail type of *DLST* points to a requirement that does not exist for the student because of an unsatisfied precondition, then a false does occur. *Used By* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Recall Interpretation

If the academic requirement main connector type is OR, then the Recall Interpretation field appears on this page. The value in this field determines how values (courses) are returned from the target (in this case, the requirement) that is being referenced.

Select a recall interpretation mode:

None: Acts like *All Components Combined*.

All Components Combined: Select to combine all course partitions.

Component with Max Course: Select to use the partition that contains the most courses. For example, a partition containing five Spanish classes would be used rather than a partition containing three Italian classes.

Each Component: Select to specify that each partition is evaluated individually against operators and other detail. This value returns a vector, which is a list of lists representing courses from each partition.

Note. A component is a partition. A partition is each detail line in the equation or each set of detail lines that is grouped by parentheses. The system uses vectors in the computations resulting from the *Each Component* value. A vector is defined as a list of lists and is used only at the requirement level. The *Each Component* value results in a separate list for each partition rather than one list, as is the case when the main connector type is AND. Any subsequent operations affect each list in the vector.

Examples of Recall Interpretation

The lists that the Recall Interpretation field recalls consist of courses that are selected by a requirement. The field causes the audit to dynamically determine how to view the courses that the requirement uses.

- Example 1

Requirement A needs to fulfill two partitions: Line 10 requiring one course from a course list of Latin studies OR Line 20 requiring two courses from a course list of Greek studies OR Line 30 requiring three courses from a course list of ethnic studies. The student has completed three classes in each course list: Latin 100, 110, and 200; Greek 100, 250, and 265; and Ethnic Studies 100, 137, and 148. Requirement A is satisfied by Latin 100, Greek 100, and Greek 250.

- Example 2

Requirement B consists of a line detail type of *DLST* with a List Recall Mode value of *Used by a Requirement*. If requirement A is specified in the Academic Requirement field, then the Recall Interpretation value that is specified in requirement B determines how the courses that are used by requirement A are returned to requirement B. If the value is *None* or *All Components Combined*, then the derived list that is created consists of all courses that are used in all partitions of requirement A.

In this example, 1 Latin course and 2 Greek courses are used. If the value is *Component with Max Courses*, then the derived list that is created consists of the courses from the component that used the most courses in requirement A. In this case, the 2 Greek courses would be returned. Even if the student had successfully completed 10 Latin courses, the derived list evaluates only the number of courses that are used in each component and selects the one with the most courses.

In this instance, the courses that satisfy Line 20 are used because Line 10 uses only one course and Line 30 does not pick up any courses because Lines 10 and 20 satisfy the two minimum partitions. When the Recall Interpretation value is *Each Component*, the derived list is a list of lists that contains the courses that are used in each component of requirement A. In this example, there are two lists, one consisting of one Latin course and one consisting of two Greek courses. Any parameters that are set on the Line Item Parameters page in reference to requirement A are applied against each component. For example, a minimum unit requirement of 12 is applied against both components that are used in requirement A, resulting in a new total of 24 minimum units.

Valid Attempts: Select to specify courses that were awarded a grade that you defined on the Grading Scheme Table page as a valid attempt. (A grade of F is typically considered a valid attempt, whereas a grade of W might not be considered a valid attempt.) Transfer courses are included as valid attempts if the Transfer Level Allowed value on the Course List Parameters page allows transfer courses and the Valid Attempt check box is selected for the appropriate Grade Input value on the Grading Scheme table. (If the Grading Scheme table does not allow transfer courses to be considered as valid attempts, then the *Valid Attempts* value does not affect the analysis.) Test credit is included as a valid attempt if the Test Credit is Allowed check box is selected on the Course List Parameters page.

Examples of Requirement Line Items

If a partial or split course is combined with another part of the same partial or split course, then special rules apply. Also, the system does not pick up fractional units for split courses when you use derived lists with a value of *Used By*.

The following example shows the interpretation of the subtraction of a split course:

When a 3-unit course is split into a 2-unit part and a 1-unit part, it is not known which part the requirement will use. Therefore 2 units minus 1 unit equals 2 units because the units that are selected are assumed to be different parts of the course. Also, 2 units minus 2 units equals 1 unit.

The following example shows the interpretation of the intersection of a split course:

Two units intersected with 1 unit equals 1 unit. Intersection assumes that the maximum possible units are identical in both cases. Similarly, 2 units intersected with 2 units equals 2 units.

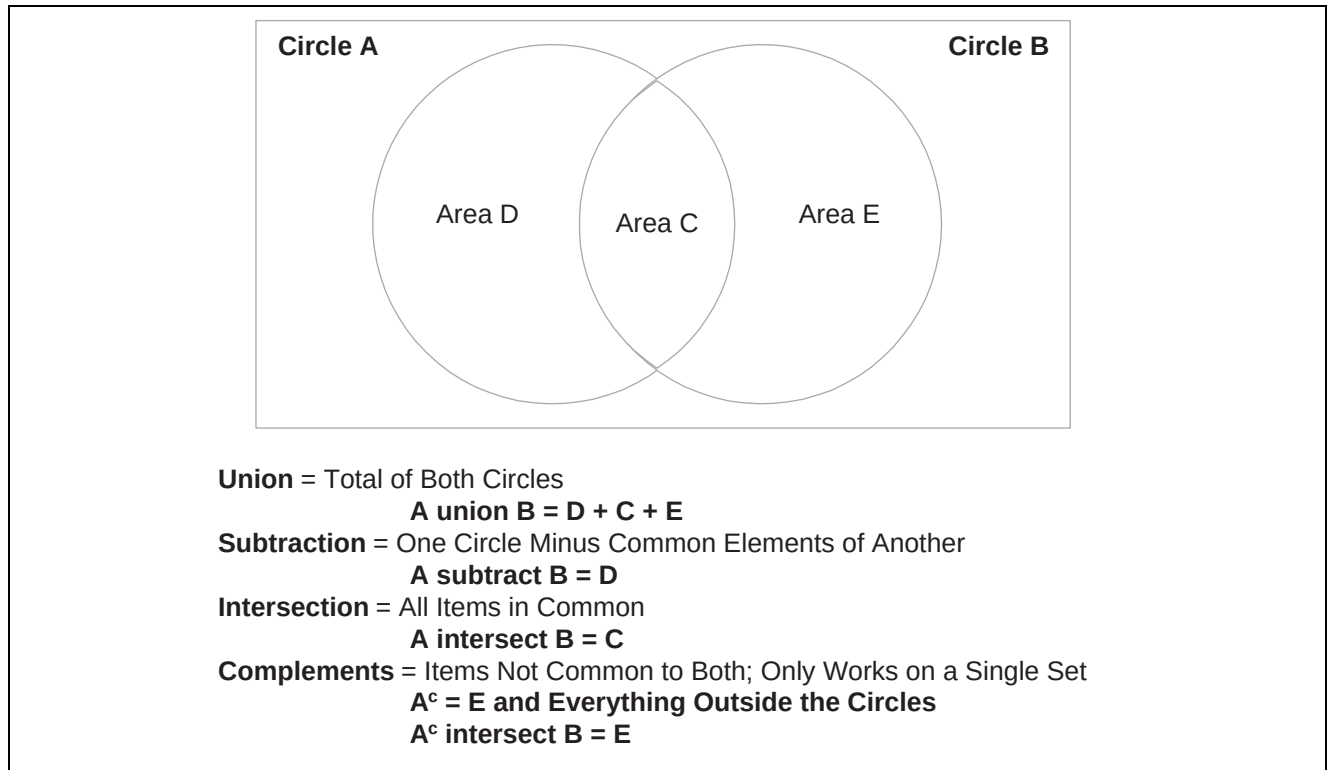
The following example shows the interpretation of the complement of a split course:

The complement of 1 unit is 2 units. A complement is an item that is not common to both areas.

The following example shows the interpretation of the union of a split course:

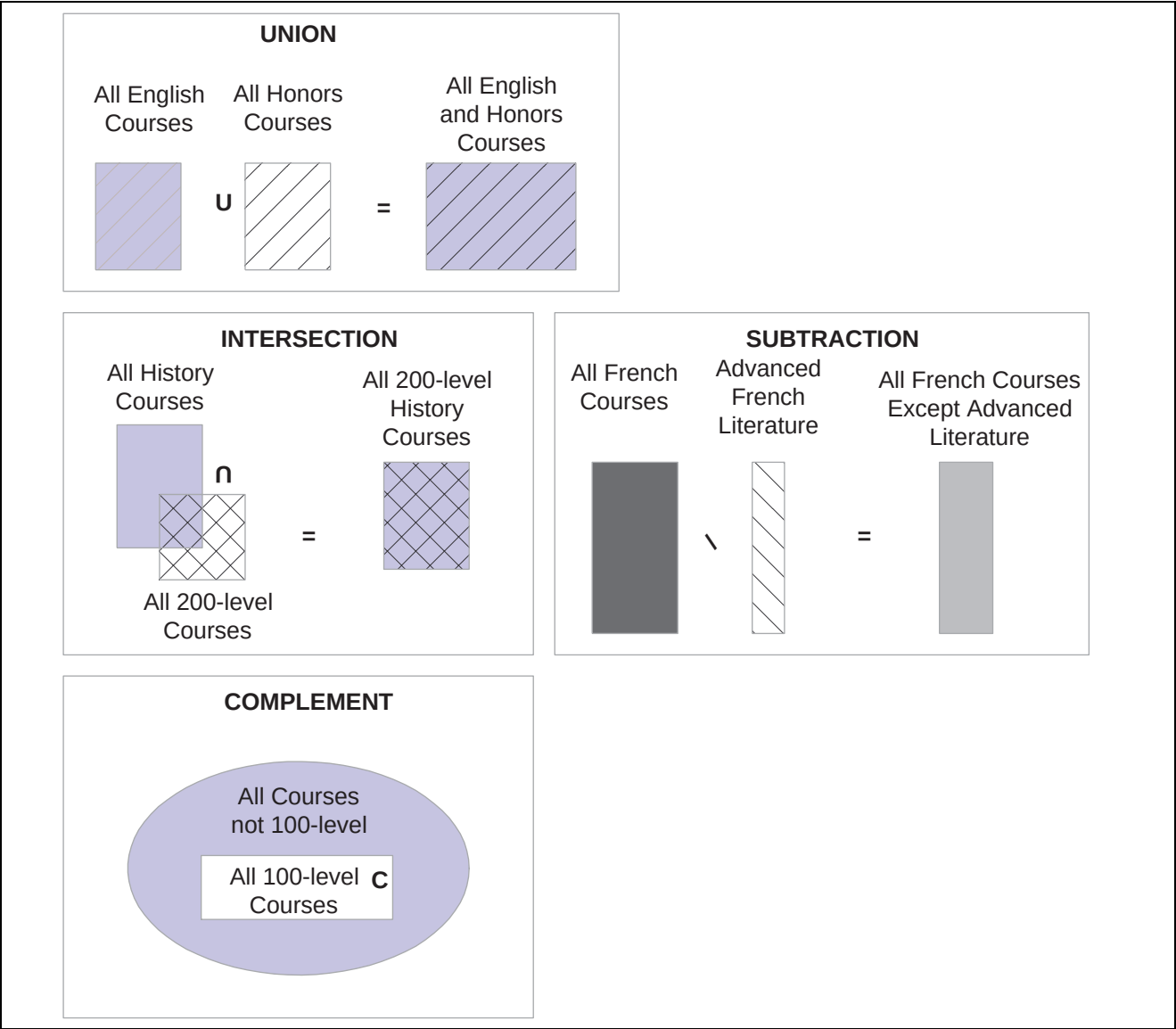
The union of 1 unit and 2 units is 2 units.

The following diagram illustrates list include mode values and set operations:



List Include Mode value examples

The following diagram provides examples of set operations:



List Include Mode value set operations

When you insert a new row, if the new line detail type is *CLST*, then the List Include Mode value affects the Course List value.

When you insert a new row, if the new line detail type is *DLST*, then the List Include Mode value affects the List Recall Mode value.

Special rules of set operation and list recall mode apply if the line type that is specified on the Line Item page is *Global Sequential Restriction*; *Sequential Restriction*; *Global Limit*; *Unit*, *Course* or *GPA Limit*; or *Specified Courses*. The following table shows those requirement line types and their allowable line detail types and list recall mode selections.

Line Type	DLST Allowed?	CLST Allowed?	Override Standard Set Logic Check Box
Global Sequential Restriction	No	All, Y	Not Available
Sequential Restriction	PL, PPL, PR, PPR, USE, GUS, DLST-1 and I	All, Y	Not Available
Global Limit	Not PL, PPL, PR, PPR, USE, or GUS	All	Available
Unit, Course or GPA Limit	All	All	Available
Specified Courses	No	All, Y	Not Available

Legend

DLST	Derived course list line detail type. This column indicates which derived lists are permitted and which operators are valid.
CLST	Course list line detail type. This column indicates which operators are valid.
PL	Used by Academic Plans list recall mode.
PPL	Used by Primary Academic Plan list recall mode.
PR	Used by Academic Programs list recall mode.
PPR	Used by Primary Academic Program list recall mode.
USE	Used by Requirement list recall mode.
GUS	Used by Requirement Group list recall mode.
DLST-1 and I	The derived list cannot be the first entry, and the operator must be I (Intersection).
All, Y	All regular course lists are permitted, but the operator must be Y (Union).

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up Transfer Credit Processing,” Defining External Organizations

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Processing Transfer Credit,” Processing Other Transfer Credit

CHAPTER 6

Setting Up Academic Requirement Groups

This chapter provides an overview of academic requirement groups and discusses how to set up academic requirement groups.

Understanding Academic Requirement Groups

Academic requirement groups are the highest-level parent record. They consist of detail lines pointing to conditions, courses, and requirements, as well as parameters that include unit and course requirements. Requirement groups identify the student population to be evaluated in the audit or advisement process. For example, requirement groups can target all undergraduate students, or only undergraduate students in the math plan, or only undergraduate students who belong to a specific student group. The advisement engine evaluates each student's career, program, and plan as well as other pertinent academic data (such as catalog year, also known as requirement term) to determine which requirement groups it should apply to the student.

The academic advising engine compares a student's career, program, plan, subplan, and precondition with the academic structure established for a requirement group. When the requirement group academic structure matches the student's academic structure, the requirement group is applied to that student.

Processing Order of Requirement Groups

The academic structure (as reflected by the academic career, academic program, academic plan, and academic subplan), the reporting sequence, and the requirement group number define the processing order of every requirement group. When the reporting sequence number is 1 for all groups, the audit processes career-level requirement groups, then program requirement groups, then plan requirement groups, and then subplan requirement groups. For requirement groups that are set up at the same academic structure level and with the same reporting sequence number, the system evaluates them in requirement group number order.

In the scenario just described, the requirement groups are processed in this order:

Career Level

Requirement Group #1000, Reporting Sequence #1

Requirement Group #1100, Reporting Sequence #1

Requirement Group #1111, Reporting Sequence #1

Program Level

Requirement Group #2001, Reporting Sequence #1

Requirement Group #2010, Reporting Sequence #1

Requirement Group #2050, Reporting Sequence #1

Plan Level

Requirement Group #1200, Reporting Sequence #1

Requirement Group #2005, Reporting Sequence #1

Requirement Group #3000, Reporting Sequence #1

Requirement Group #4700, Reporting Sequence #1

Subplan Level

Requirement Group #700, Reporting Sequence #1

If you have not specified that you want to evaluate subplans before plans or plans before programs, and the reporting sequence number is greater than 1, then the reporting sequence number applies across career-level and program-level requirement groups. For example, a career-level requirement group with a reporting sequence number of 3 is processed and reported after a program-level requirement group with a reporting sequence number of 2. This interaction of sequence numbers affects only career-level and program-level requirement groups. Program-level requirement groups do not interact with plan-level requirement groups, and plan-level requirement groups do not interact with subplan-level requirement groups. If the requirement groups previously listed all had different reporting sequence numbers, then the groups would be processed and reported in this order:

Career Level, Requirement Group #1111, Reporting Sequence #1

Program Level, Requirement Group #2001, Reporting Sequence #1

Career Level, Requirement Group #1100, Reporting Sequence #2

Program Level, Requirement Group #2010, Reporting Sequence #5

Program Level, Requirement Group #2050, Reporting Sequence #5

Career Level, Requirement Group #1000, Reporting Sequence #900

Plan Level

Requirement Group #4700, Reporting Sequence #1

Requirement Group #3000, Reporting Sequence #900

Requirement Group #2005, Reporting Sequence #901

Requirement Group #1200, Reporting Sequence #999

Subplan Level

Requirement Group #700, Reporting Sequence #1

Reporting Sequences of 900 or Higher

A reporting sequence number of 900 or higher affects the processing order of a requirement group that points to a VERIFY requirement. This special sequence number prevents that particular requirement group from being processed until the end of the audit. For example, you can establish a career requirement that verifies all courses that are used throughout the audit.

For a requirement group with a reporting sequence number of 900 or higher that points to an ALL STATS requirement, the requirement group is processed at the time it is encountered.

The reporting of a requirement group with a reporting sequence number of 900 remains the same in both scenarios. It displays last within its academic structure level.

Multiple Programs, Plans, and Subplans

Advisement audits are generated by career. The career requirement groups as well as the primary academic program (the program with the lowest career sequence number) are evaluated first. Then the primary plan (the plan with the lowest plan sequence number) that is associated with this program is evaluated, and then all the subplans that are associated with this plan are evaluated in alphabetical order. If a student has a secondary program, it is then evaluated, followed by attached plans and subplans. When multiple programs exist, they are evaluated in alphabetical order after the primary program is processed.

For example:

Career

Primary program (career sequence number 0)

Primary plan (plan sequence number 10)

Subplan attached to plan 10

Secondary plan (plan sequence number 20)

Subplan attached to plan 20

Secondary program (career sequence number 1)

Plan attached to secondary program

Changes to Academic Structure Processing

You can change academic structure processing by selecting the Evaluate Plan Before Program check box on the Academic Plan Table page and the Evaluate SubPlan Before Plan check box on the Academic Sub-Plan Table page.

Important! If the audit encounters a plan that is attached to the student's primary academic program and you selected the Evaluate Plan Before Program check box, then the academic structure is *not* altered by reporting sequence between the career and program. All career requirements are processed first, then plan requirements are processed, and then program requirements are processed.

For example, if the plan in the previous example were selected to be evaluated before the program, then the reporting order would remain the same as before, and this would be the processing order:

Career Level

Requirement Group #1111, Reporting Sequence #1

Requirement Group #1100, Reporting Sequence #2

Requirement Group #1000, Reporting Sequence #900

Plan Level

Requirement Group #4700, Reporting Sequence #1

Requirement Group #3000, Reporting Sequence #900

Requirement Group #2005, Reporting Sequence #901

Requirement Group #1200, Reporting Sequence #999

Program Level

Requirement Group #2001, Reporting Sequence #1

Requirement Group #2010, Reporting Sequence #5

Requirement Group #2050, Reporting Sequence #5

Sub-plan Level

Requirement Group #700, Reporting Sequence #1

Note. This new processing order affects only plans and subplans that are designated on the first page (Requirement Groups) of the Academic Requirement Groups component. If you append a plan to another plan on the Plans Appended page, then the requirement uses the characteristics of the first plan, not the appended plan. For example, suppose that you set up requirement group 200 as PSUNV/UGRD/FAU/MUSIC (PeopleSoft University/Undergraduate/Fine Arts Undergraduate/Music) and append a plan of PSUNV/UGRD/LAU/PSYCH (PeopleSoft University/Undergraduate/Liberal Arts Undergraduate/Psychology). On the Academic Plan Table page for the music plan, you did not select the Evaluate Plan Before Program check box. On the Academic Plan table for the psychology plan, you *did* select the Evaluate Plan Before Program check box. After evaluating the program level requirement groups, the audit engine evaluates the psychology plan requirement groups that are appended to the music plan requirement groups.

Setting Up Academic Requirement Groups

To create an academic requirement group:

1. Enter the institution, career, program, plan, and subplan information for the new requirement group on the Requirement Group page.
Also create the requirement group catalog description.
2. Establish the requirement group parameters or filters for this requirement group on the Parameters page.
Specify whether the requirement group has a course share set that enables it to share courses with another group.
3. Enter the detail for this requirement group on the Detail page.
4. Indicate any course validation parameters for this requirement group on the Detail Parameters page.
5. Enter any additional plans and subplans that are required for a specific requirement group on the Plans Required page.
6. Point to established requirements in another requirement group on the Plans Appended page.

Pages Used to Set Up Academic Requirement Groups

Page Name	Object Name	Navigation	Usage
Requirement Group	ADVIS_RQRMNT_GROUP	Academic Advising, Academic Requirements, Define Requirement Groups	Establish the institution, career, program, plan, and subplan information for a new requirement group.

Page Name	Object Name	Navigation	Usage
Parameters	ADVIS_RQ_GRP_PARM	Academic Advising, Academic Requirements, Define Requirement Groups, Parameters	Establish the requirement group parameters or filters for this requirement group.
Detail	ADVIS_RQ_GRP_DET	Academic Advising, Academic Requirements, Define Requirement Groups, Detail	Assign the detail for a specific requirement group. You can view all detail lines, including connector types, that affect the requirement group.
Detail Parameters	ADVIS_RQ_GRP_DET_PARM	Academic Advising, Academic Requirements, Define Requirement Groups, Detail Parameters	Establish course validation parameters. This page is blank unless the group line type on the Detail page is Course or Wild Card Course.
Plans Required	ADVIS_RQ_GRP_DET_PARM	Academic Advising, Academic Requirements, Define Requirement Groups, Plans Required	Define plans and subplans that are required for a specific requirement group. For example, a student with a major in English may be required to declare a specialization. You use this page to define the required subplan. During the degree audit process, a student's records (not requirements) are checked. The audit is not complete until this condition is satisfied. Once a student declares a required plan or subplan on the Student Program page, the specific requirement groups that need to be satisfied for the plan or subplan appear on the degree audit report. If the student has not declared the required plan or subplan on the Student Program page, then a generalized message appears on the degree audit report indicating that a required plan or subplan has not been satisfied.
Plans Appended	ADVIS_RQ_GRP_DET_PARM	Academic Advising, Academic Requirements, Define Requirement Groups, Plans Appended	Point to established requirement groups (by academic structure) and append those groups to the requirement group identified on this page. Requirement groups that have already been established can be appended to another requirement group.

Setting Up Requirement Groups

Access the Requirement Group page.

Requirement Group | Parameters | Detail | Detail Parameters | Plans Required | Plans Appended

Find | View All | 1 of 1

Requirement Group: 000115

***Effective Date:** 02/02/1900 ***Status:** Active

***Description:** LAU GE Distribution ***Reporting Seq:** 1

***Short Description:** LAU GE Dis ***Usage:** Academic Advisement

***Long Description:** College of Liberal Arts General Education Distribution Requirements

***Academic Institution:** PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Academic Program: LAU Liberal Arts Undergraduate

Academic Plan:

Academic Sub-Plan:

Pre-Condition: Academic Sub Plan Equal

▼ Catalog Description Find | View All | First 1 of 1 Last

College of Liberal Arts General Education Distribution Requirements:

☐ Enable Catalog Print

☐ Override Standard Description

Requirement Group page

Several fields on this page affect the order in which requirement groups appear on a degree audit report. The academic structure (as reflected by the Academic Career, Academic Program, Academic Plan, and Academic Sub-Plan fields) and the Reporting Seq (reporting sequence) field define the audit order of requirement groups. For example, requirement groups that are established at the career level are printed before requirement groups that are set up at the program level.

The system assigns a unique, sequential identifying number to each requirement group. (However, you can assign the number, if necessary.) Each requirement group consists of detail lines that point to conditions, courses, or requirements as well as parameters that include unit and course requirements.

In Add mode only, the Copy button appears on the first page of the Academic Requirement Groups component. Requirement groups that are eligible to be copied are academic requirement groups with a usage value of *Academic Advisement* or a user-defined usage value. This feature copies all field values in a requirement group except for course share sets. To copy an eligible requirement group, click the Copy button and enter the requirement group that you want to copy. Then enter the appropriate copy mode field value. Choices include *Copy last record*, *None*, and *Copy all records*.

Copy last record: Select to specify that only the last effective-dated record is copied.

None: Converts to *Copy last record*.

Copy all records: Select to specify that all effective-dated records are copied. (Use this field value only when the requirement group to be copied has multiple effective-dated rows.)

Then click OK to copy the specified requirement group.

Note. You can copy a requirement group with a usage value of *Academic Advisement* and then change the usage value of the new copy to *Student Individualized Plan*. Also, if you use the copy feature to create a new requirement group, then you cannot assign a specific requirement group number to the new group. When you click the Copy button and save, the system automatically assigns the next sequential number to the new requirement group. If you must assign a specific, unused number to the new requirement group, do not click the Copy button. Instead, create the new requirement group by reentering all of the field values.

Effective Date

Enter an effective date to define when the status that you select is valid. (Add a new effective-dated row if any of the requirement group information changes.) This date reflects the student's requirement term as determined by the requirement group.

When you apply a requirement group to a student, the requirement term begin date of the requirement group academic structure determines which effective-dated row is current for the student. For example, if you define a requirement group to the plan level, then the system uses the student's plan requirement term to determine the effective date for the requirement group. (You define requirement terms on the Student Program/Plan component.) The system then uses this requirement term to evaluate the current effective-dated row for all requirements and course lists that the requirement group uses.

As an example, suppose that you apply a requirement group defined at a program level to a student. It has two effective-dated rows of 01/01/1900 and 01/01/2000. The student's academic program requirement term is fall 1999, so the current effective-dated row for the requirement term of fall 1999 is 01/01/1900. The 01/01/1900 requirement group points to a requirement with effective-dated rows of 01/01/1900 and 01/01/1980. Again, the system uses the student's program requirement term (because that was the academic structure of the requirement group that uses this requirement), and the current effective-dated row for requirement term fall 1999 is now 01/01/1980. The 01/01/1980 requirement uses a course list with two effective-dated rows of 01/01/1900 and 01/01/1990. Once again the system uses the student's program requirement term to evaluate the current effective-dated row to be used, which in this case would be 01/01/1990.

Status

Active: Select when adding a new requirement group.

Inactive: Select only if your institution will no longer use this requirement group. (Add a new effective-dated row if any of the requirement group information changes.)

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Description, Short Description, and Long Description

Enter a description of the requirement group that is meaningful as a search key. This description appears in search results for requirement groups. For example, a description of *1998 req for PSYCH* (1998 requirement for psychology) helps to identify this requirement group. The Short Description appears only on this page. The Long Description is the internal description of the requirement group and is also printed on the degree audit report.

Note. You can alter the academic structure processing of requirement groups by evaluating plans before programs, evaluating subplans before plans, or both.

Reporting Seq (reporting sequence)

Enter the sequence or order (within a specific level of the academic structure) in which the audit engine analyzes and reports a requirement group. (The default value is 1.) There is a difference between processing order and reporting order. *Processing order* refers to the order in which the audit engine processes courses. Academic structure, requirement group number, and reporting sequence number affect processing order. *Reporting order* refers to the order in which courses, requirements, and requirement groups are printed in the audit report.

Each requirement group below is identified by the level to which it is defined (for example, career, program, plan, and subplan), the requirement group number, and the reporting sequence number. The requirement groups are listed in reporting sequence number order within each level:

Career Level

Requirement Group #1111, Reporting Sequence = 1

Requirement Group #1100, Reporting Sequence = 2

Requirement Group #1000, Reporting Sequence = 900

Program Level

Requirement Group #2001, Reporting Sequence = 1

Requirement Group #2010, Reporting Sequence = 5

Requirement Group #2050, Reporting Sequence = 5

Plan Level

Requirement Group #4700, Reporting Sequence = 1

Requirement Group #3000, Reporting Sequence = 900

Requirement Group #2005, Reporting Sequence = 901

Requirement Group #1200, Reporting Sequence = 999

Sub-plan Level

Requirement Group #700, Reporting Sequence = 1

The default value in the Reporting Seq field is 1, which results in the engine reporting requirement groups in requirement group number order within each section of the academic structure. If the requirement groups in the previous list all had a reporting sequence number of 1, the groups would be reported in the this order:

Career Level

Requirement Group #1000, Reporting Sequence = 1

Requirement Group #1100, Reporting Sequence = 1

Requirement Group #1111, Reporting Sequence = 1

Program Level

Requirement Group #2001, Reporting Sequence = 1

Requirement Group #2010, Reporting Sequence = 1

Requirement Group #2050, Reporting Sequence = 1

Plan Level

Requirement Group #1200, Reporting Sequence = 1

Requirement Group #2005, Reporting Sequence = 1

Requirement Group #3000, Reporting Sequence = 1

Requirement Group #4700, Reporting Sequence = 1

Sub-plan Level

Requirement Group #700, Reporting Sequence = 1

If you change the value in the Reporting Seq field, then the advisement engine reports the requirement groups by reporting sequence number. If you assign two or more requirement groups the same reporting sequence number (for example, 5, 10, or 900) within the same section of the academic structure, then the groups are sorted by requirement group number.

If the Reporting Seq value is greater than 1, then the reporting sequence number applies across career-level and program-level requirement groups. For example, a career-level requirement group with a Reporting Seq value of 3 would be processed and reported after a program-level requirement group with a Report Seq value of 2. This interaction of sequence numbers affects only career-level and program-level requirement groups. Program-level requirement groups do not interact with plan-level requirement groups, and plan-level requirement groups do not interact with subplan-level requirement groups. If the requirement groups in the previous list all had different reporting sequence numbers, then the groups would be reported in the this order:

Career and Program Levels

Requirement Group #1111, Reporting Sequence = 1

Requirement Group #2001, Reporting Sequence = 1

Requirement Group #1100, Reporting Sequence = 2

Requirement Group #2010, Reporting Sequence = 5

Requirement Group #2050, Reporting Sequence = 5

Requirement Group #1000, Reporting Sequence = 900

Plan Level

Requirement Group #4700, Reporting Sequence = 1

Requirement Group #3000, Reporting Sequence = 900

Requirement Group #2005, Reporting Sequence = 901

Requirement Group #1200, Reporting Sequence = 999

Sub-plan Level

Requirement Group #700, Reporting Sequence = 1

Usage

Select the value that specifies how data in this requirement group will be used. (The page must be in Add mode to input a field value.) Two requirement group usage values are delivered with the system and should not be modified in any way.

Academic Advisement: Select to have the system use this requirement group during the regular degree audit process.

Student Individualized Plan: Select to have the system use this requirement group as a substitute requirement group for a student or group of students. You assign this requirement group on the Authorize Student Exceptions pages.

You can also define a special usage for a requirement group on the Requirement Usage page. You use special usage values to isolate or point to specific groups of students with common characteristics, and to isolate special requirement groups that you can attach to a transcript type that can be run against any student.

After you assign this special usage to a requirement group, use the Transcript Type component to specify a special report. Identify the special report by the requirement group usage.

See [Chapter 3, “Setting Up Optional Advisement Data,” Setting Up Special Requirement Usage Values, page 16.](#)

Note. A requirement group with a Usage of *Student Individualized Plan* can point to requirements with a usage of *Student Individualized Plan* and *Academic Advisement*.

Important! The system uses the Academic Career, Academic Program, Academic Plan, and Academic Sub-Plan fields on this page during analysis to search for requirements that match a student’s record. (These fields are not just prompt values.) The system ignores blank fields, and uses a requirement group for a particular career, program, plan, or subplan only if all the nonblank fields match exactly. Fields are matched in a hierarchical order. For example, if the requirement group reflects an entire career, then a value appears in the Academic Career field, while the Academic Program, Academic Plan, and Academic Sub-Plan fields are left blank.

Academic Career

Enter the academic program for this requirement group. There can be any number of academic programs within an academic career.

Academic Program

(Optional) Enter the program to which a student applies, is admitted, and ultimately graduates. The academic plan is active within this program. An academic program can contain any number of academic plans. If you do not enter a value, then the requirement group applies to all programs within the specified career.

Academic Plan

(Optional) Enter an area of study (for example, major or minor) within the academic program. Some plans are subdivided into subplans. If you do not enter a value, then the requirement group applies to all plans within the specified career or the specified program, if a program is entered on this page.

The system ensures that the program or career values are valid for the plan; error messages occur when necessary. (Some academic plans are defined only to a career, so a program is not necessary.)

Academic Sub-Plan

(Optional) Enter a further specialization within the academic plan. There can be any number of academic subplans within an academic plan. If you do not enter a value, then the requirement group applies to all subplans within the specified career or the specified plan, if a plan is entered on this page.

Pre-Condition

Enter a precondition to restrict the use of a requirement group to a particular type of student. For example, if a requirement group has a precondition of *Academic Standing Equal Good Standing*, then this requirement group applies only to a student in good academic standing.

If the precondition is false for a student, then the system does not consider the requirement group during analysis. The audit engine evaluates and reports the requirement group and student Information only if the precondition is true for the student. (The default value is *None*, indicating that the field is deactivated.) If this field contains a value other than *None*, then additional fields are available to complete the precondition statement.

Possible operators for a precondition statement include *None*, *< or =*, *> or =*, *Equal*, *Greater*, *In*, *Less*, *Not Equal*, and *Not In*. *None* is the same as *Equal*. Operators are not used if the precondition is *Table Entry*. If the precondition is *Table Entry*, then select one of the dynamic conditions that you previously created in the Define Dynamic Condition component.

Note. A student with a null set of entities is always considered true for all plurals of that entity for both *in* and *not in* because the null set is included in all entity groups and all entity group compliments.

Basic precondition values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. However, you can use a condition specification as a precondition on the Requirement Group page. You use the Define Dynamic Condition component to define new condition specifications. You establish the description, academic institution, and connector type of the new condition specification on the Condition page. After you create a condition specification, you can use it as a condition line type in a requirement; as a condition group line type in a requirement group; or as a precondition on the Requirement Group, Requirement, or Requirement Line Item page.

Warning! Preconditions can be a powerful tool that the system uses to determine whether it should apply a particular requirement group to a student. However, complex condition and multiple condition processing take processing time; therefore, use them only when needed.

For example, rather than setting up one requirement group at the program level that points to requirements with preconditions of specific plans within the program, consider establishing requirement groups for each requirement and define the requirement group at the plan level. The system retrieves only the requirement groups that correspond to a student's academic record. Retrieving a requirement group with a few requirements attached takes less time than processing one requirement group with many requirements that are all attached with preconditions.

Note. A precondition of Academic Plan, Academic Plans, Academic Program, Academic Programs, Primary Academic Plan, Primary Academic Program, Academic Sub-Plan, Academic Sub-Plans, Student Group, or Student Groups uses an entity group value to complete the statement.

In addition, the operators *In* and *Not In* are used with an entity group value.

See [Chapter 10, “Creating and Using Expanded Conditions and Custom Conditions,” Defining Academic Entity Groups, page 132.](#)

Select a precondition value.

None: No precondition.

Academic Level: Select to specify a student’s year of study. (For example, valid values include freshman and sophomore.) The system evaluates this value against the student based on the as of date that you specify at run time.

Academic Plan: Select to specify a student’s academic plan. If the student has only one plan, *Academic Plan* and *Primary Academic Plan* reference the same plan.

Academic Plans: Select to specify that all of a student’s plans are part of the equation.

Academic Program: Select to specify a student’s academic program. If the student has only one program, *Academic Program* and *Primary Academic Program* reference the same program.

Academic Programs: Select to specify that all of a student’s academic programs are part of the equation.

Academic Standing: Select to specify a student’s standing at the institution. (For example, values might include good standing, probation, and dismissal. Values are defined on the Academic Standing Table page.) The system evaluates this value against the student based on the as of date that you specify at run time.

Academic Sub-Plan: Select to specify a student’s academic subplan.

Academic Sub-Plans: Select to specify that all of a student’s subplans are part of the equation.

Cumulative Grade Point Average: Select to specify a student’s cumulative grade point average (derived from the student’s term history cumulative statistics, in conjunction with the processing as of date).

Primary Academic Plan: Select to specify a student’s primary academic plan, the plan designated by the lowest plan sequence number on the Student Plan page. (For example, under a program of LAU, a student might have two plans, PSYCH and CLASSICS MINOR. If PSYCH has a plan sequence number of 10 and CLASSICS MINOR has a plan sequence number of 20, then PSYCH is the primary academic plan. On the Student Plan page, the primary career is designated as Student Career Nbr 0 [student career number 0].)

Important! The primary academic plan is the plan designated by the lowest plan sequence number on the Student Plan page, and the primary academic program is the program designated by the lowest career sequence number on the Student Program page. However, if a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is that plan with the lowest plan sequence number under the program with the lowest student career number. For example, suppose that under a program of LAU (attached to a student career number of 0), a student has a plan of PSYCH with a plan sequence number of 10. The same student has a plan of ART with a plan sequence number of 10 under a program of FAU (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan.

In this example, the primary plan is PSYCH, which is tied to a student career number of 0 through the LAU program.

Primary Academic Program: Select to specify a student's primary academic program. The primary academic program is the program designated by the lowest career sequence number. (On the Student Program page, the primary career is designated as Student Career Nbr 0.)

Student Group: Select to specify a grouping of students. (For example, values might include athlete and veteran.) You define values on the Student Group table.

Student Groups: Select to specify that all student groups containing a student are part of the equation.

Table Entry: Select to specify a dynamic condition that you have previously created in the Define Dynamic Condition component.

Catalog Description

The system populates this field by default with the long description of the requirement group. This field is for reference purposes only. It appears on the summary pages, but this text does not print on the advising report.

Enable Catalog Print

This check box has no effect in the delivered software. However, you can write your own program that uses it to report on requirement groups.

Override Standard Description

Select to add a detailed description of the requirement group in the large Catalog Description field. If you do not select the check box, then the system populates this field by default with the long description.

Establishing Requirement Group Parameters

Access the Parameters page.

Requirement Group: 000115 Description: LAU GE Distribution

Effective Date: 02/02/1900 Status: Active

Minimum GPA: Default for Detail Level

Minimum Units: Min Grade Points/Unit:

Minimum Courses: 6.00

*Course Ranking Scheme: Chronological

*Reporting: Always Report

*Credit Include Mode: All Stats

Choice Resolution Method: Satisfy in Sequential Order

Connector Type
☐ AND ☒ OR

☐ Partition Sharing Min Partitions to Complete: 1
 Max Partitions to Allow Credit:

*Course Share Set	Description		
000000010	Psych/GE Share	+	-
000000011	LAU Dist with ENGL-BA	+	-
000000012	SOC/LAU GE	+	-

Parameters page

Note. In order for requirement group parameters to work, you must define detail lines on the Detail page. You can set up the parameters first, but detail lines are necessary for the parameters to be effective.

The fields on this page are identical to the fields on the Requirement Parameters page. If the field values that you enter on the Requirement Parameters page are greater than the field values that you enter on the Requirement Group Parameters page, then the parameters that you specify at the requirement level override those at the requirement group level.

You should *always* insert required parameters at the lowest level possible. For example, if the requirement specifies that the minimum number of units is 24 and the requirement group specifies that the minimum number of units is 18, then the audit attempts to find 24 units. However, the reciprocal is also true. If the requirement needs 6 units but the requirement group needs 10 units, then the audit engine searches for 10 units.

If a requirement (or a requirement group) needs a minimum amount of units and courses that is greater than the sum of the specific line requirements, and the Credit Include Mode field value is *All Stats* at the requirement (or requirement group) level, then the audit engine first uses as many units or courses as needed at the lowest parameter level. For example, if a single requirement line needs one course and a requirement group also points to that single requirement, then you should set the minimum course parameter at the requirement line level.

For more information about how parameters at the requirement group and requirement levels interact, refer to the Credit Include Mode diagram and the supporting text.

Minimum GPA (minimum grade point average) Enter the minimum overall GPA requirement for classes selected to satisfy this requirement group. (For example, if a student needs to take four Math 100-level classes with an overall GPA of 2.500 for a total of 12 units with a grade of C or better in each class, then enter 2.500 in this field.)

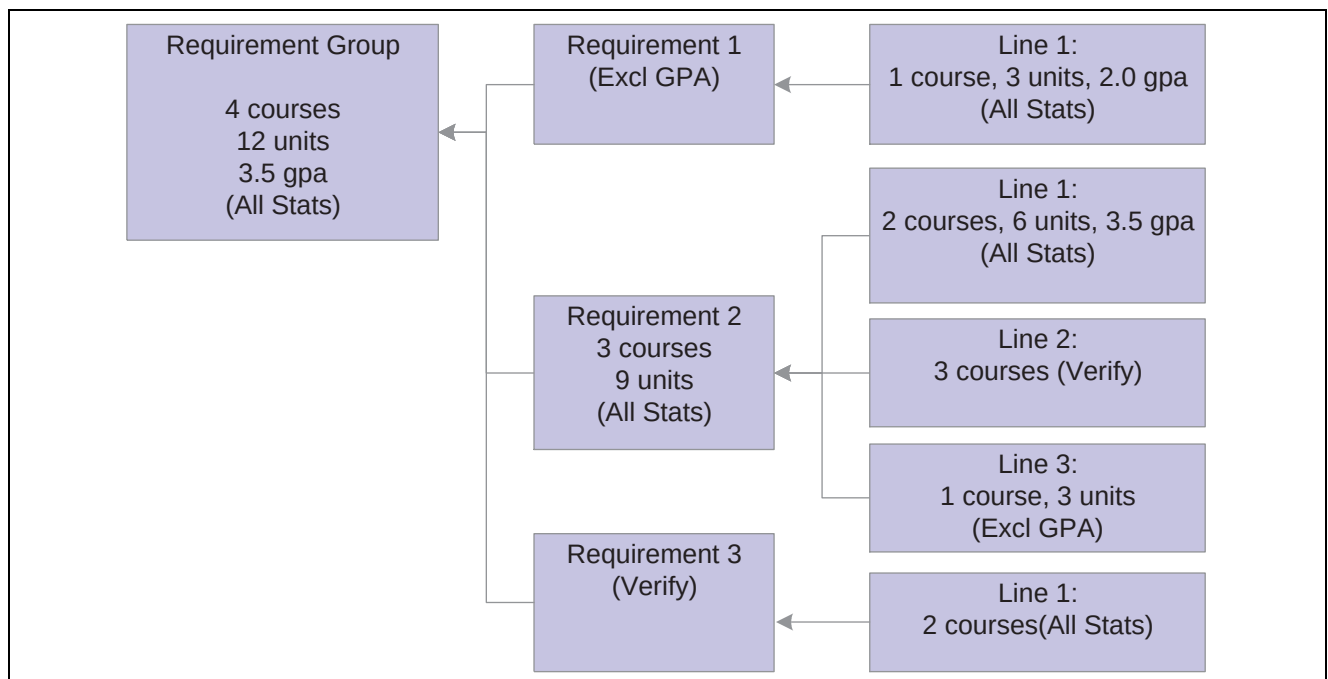
	In-progress courses or grades that are not included in GPA (for example, pass/no pass or transfer credit grades) satisfy the minimum GPA requirement.
Minimum Units	Enter the minimum total units for all of the courses selected to satisfy this requirement group.
Default for Detail Level	Enter the minimum course grade that satisfies this requirement group. This value automatically appears by default to each detail line.
Min Grade Points / Unit (minimum grade points per unit)	Enter the minimum grade points per unit needed to satisfy this requirement group. The value in this field reflects a portion of the course validation parameters listed on the Detail Parameters page.
Reporting	Select the conditions under which the requirement group is reported: <i>Always Report:</i> Select to specify that the requirement group is always reported, regardless of the completion status. <i>Report Only When Not Satisfied:</i> Select to specify that the requirement group is reported only if the student did not successfully complete it. (For example, you could use this value to report probationary status.) <i>Report Only When Satisfied:</i> Select to specify that the requirement group is reported only when the student successfully completes it. (For example, you could use this value to report honors status.) Except for <i>Always Report</i>, every reporting value acts as a postcondition. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Important! The Reporting field value <i>Report Only When Not Satisfied</i> behaves differently depending on whether the Credit Include Mode field value is <i>All Stats</i> or <i>Verify</i>. For example, for a requirement with a Minimum Units field value of 3.00, a Credit Include Mode field value of <i>All Stats</i>, and a Reporting field value of <i>Report Only When Not Satisfied</i>, the results of the audit are not as expected because the requirement group may be printed on the degree audit report even if it is unsatisfied. However, if the Credit Include Mode field value is <i>Verify</i>, then the result is predictable.
Credit Include Mode	Select how courses in the requirement group are included in the degree audit: <i>All Stats:</i> Select to specify that all course statistics are reported. A course captured by an <i>All Stats</i> requirement group is used for that requirement group and cannot be counted toward any other <i>All Stats</i> requirement group. <i>Excl GPA:</i> Select to specify that courses in this requirement group are excluded from GPA. You use this value at the lower level of requirement or at the requirement line level to prevent the system from using the GPA from certain courses at the higher level of requirement or requirement group. A course captured by an <i>Excl GPA</i> requirement is used for that requirement group and cannot be counted toward any other <i>All Stats</i> or <i>Excl GPA</i> requirement group. <i>Verify:</i> Select to specify that the application checks and verifies that the course was taken, but does not record the credit, so that the course can be used elsewhere in the audit. (A course captured by a <i>Verify</i> requirement group can be used by another <i>Verify</i> requirement group, <i>Excl GPA</i> requirement group, or <i>All Stats</i> requirement group.) However, the course is counted

toward requirement group completion. (For example, for a graduate program electives requirement group, verify that all graduate students in the School of Education master's degree program complete at least two courses numbered 400 or higher in an academic area or plan other than their own.) You use this value more commonly in requirements that have overall unit requirements (such as completion of 120 units to graduate), required term unit loads, or required academic standing status.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Important! When the credit include mode value is *Verify*, the parameters (Minimum Units and Maximum Units Allowed field values) act as boundaries for determining a truth value. For example, if the Minimum Units value is 6.0, the Maximum Units Allowed value is 15.0, and the student has fewer than 6 or more than 15 units, then the truth value is false. If the student is within this range, then the truth value is true. *Verify* accepts and reports all courses that match the course list and transcript, whereas the *All Stats* and *Excl GPA* lines use the minimum courses in order to free additional courses to be used elsewhere.

In the following example, the requirement group requires a total of four courses for 12 units with a combined minimum GPA of 3.5. The three detail lines (requirements) contribute to these parameters according to the credit include mode value assigned at each level.



Credit Include Mode diagram

Requirement 1 has one detail line. The line requires one course of three units with a minimum GPA of 2.0. Credit include mode for this line is set to *All Stats*, which allows units, course count, and GPA to be passed to the requirement level. The requirement credit include mode is set to *Excl GPA*, which allows only units and course count to contribute to the minimum parameters required at the requirement group level.

Requirement 2 requires a minimum of three courses for a total of nine units. Line 1 requires two courses with a minimum of six units and a minimum GPA of 3.5. Credit include mode for this line is set to *All Stats*, so all information is passed to the requirement level. Because this is the only line that contributes to the GPA at the requirement level, the GPA required at the requirement group level is derived from the courses captured here. Line 2 requires three courses, but the credit include mode at this level is set to *Verify*, so no course information is passed to the requirement level. No courses used here contribute to the three courses or nine units at the requirement level. This line only helps to satisfy the overall requirement by passing a true (if the three courses are found) or false. Line 3 requires one course of three units. The credit include mode for this line is set to *Excl GPA*, which prohibits the line from contributing to the minimum 3.5 GPA at the requirement group level. Only course count and units are passed to the requirement level.

Requirement 3 has one detail line that requires two courses. Credit include mode for this line is set to *All Stats*, so courses are used to satisfy this line, and course count, units, and GPA are passed to the requirement level. However, the credit include mode for the requirement is set to *Verify*, so no course information is passed to the requirement group level. This requirement passes a true or false value to the requirement group level and is used in determining the completion status of the overall requirement group.

Choice Resolution Method

This is the preferred method of analyzing multiple partitions in an AND or OR statement. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Values are:

Satisfy in Sequential Order: Select to specify that the system evaluates detail lines in sequential order except for limits that are analyzed first. For example, if the requirement consists of Line 10 OR Line 20 OR Line 30 OR Line 40 where partition sharing is allowed and the minimum partitions to complete is two, then any two partitions must be satisfied, although Line 10 and Line 20 are analyzed first. In another example, if a requirement consists of Line 10 OR Line 20, then a course that can satisfy both Line 10 or Line 20 is used to satisfy Line 10 if Line 10 is not already satisfied. If a student has completed Math 1 and Math 5, and Line 10 requires Math 1 and Math 2 and Line 20 requires Math 1 and Math 5, then Math 1 is used to satisfy Line 10, not Line 20. When the field value is *Satisfy in Sequential Order*, a student can satisfy Line 20 before Line 10 if the lines require different courses and the student has completed the required courses for Line 20.

Investigate All Combinations: Select to specify that after the system analyzes limits, it sorts detail lines to find the best combination in regard to the requirement group. For example, if the requirement consists of Line 10 OR Line 20 OR Line 30 OR Line 40 where partition sharing is allowed and the minimum partitions to complete is two, then any two of the lines must be satisfied. In another example, Line 10 requires Math 1 and Math 2 and Line 20 requires Math 1 and Math 5. The student has completed Math 1 and Math 5. Line 20 is satisfied.

Important! Regardless of which Choice Resolution Method field value you select, if the student does not meet the requirements of any of the lines, then the audit lists the courses that are available to fulfill each of the partitions. If the student meets the requirements for the minimum number of partitions, then the audit lists only the courses for the satisfied partitions.

Connector Type

Select the main (default) Boolean operator to use in the equation that contains the detail lines. Detail lines joined by the opposite of the main connector type

are grouped into one partition. Detail lines joined by the main connector are considered as individual components (or partitions) of the equation. A partition is each detail line in the equation or each set of detail lines grouped by parentheses. For example, if the connector type is AND and the detail lines are A OR B AND C OR D AND E, then the detail appears on the page as (A OR B) AND (C OR D) AND E. The first partition is (A OR B), the second partition is (C OR D), and the third partition is E. The main connector (that is, the connector that joins the partitions) is AND. (The connector that joins components within a partition is always the opposite of the main connector type.) In another example, if the main connector is OR and the detail lines are A OR B AND C OR D, then the detail appears on the page as A OR (B AND C) OR D. The first partition is A, the second partition is (B AND C), and the third partition is D. The system uses this field as the connector default on the Detail page when you insert rows.

Partition Sharing

Select to specify that partitions can share courses. For example, in the statement (A OR B) AND (B OR D), there are two partitions. If the student took course B, then only one or both partitions are satisfied, depending on whether sharing is allowed. (The default for this check box is clear.) If the credit include mode value is *Verify*, you do not need to activate partition sharing. However, if there is a history course that satisfies both the general education requirement and the writing requirement, you can select this check box to share courses on those two requirement lines.

If the connector type is OR, then these fields are available:

Min Partitions to Complete
(minimum partitions to complete)

Enter the minimum number of partitions that must be completed to satisfy the requirement group. For example, in the statement A OR B OR (C AND D), if the value in this field is 2, then the audit engine searches for two of the three partitions.

Max Partitions to Allow Credit (maximum partitions to allow credit)

Enter the maximum number of partitions that can be credited toward meeting a requirement group. For example, you might use this feature in a distribution requirement where a student must meet five of seven partitions, but cannot get credit for more than five partitions.

Example

Suppose that the statement is (A AND B) OR (C AND D) OR (A AND F) OR (C AND G). The Min Partitions to Complete is 2 and the Partition Sharing check box is selected. If the student took courses A, B, and F or courses C, D, and G, then the statement is satisfied.

Enter the appropriate course share set. (Prompt contains values that were established using the Course Share Sets page.) The course share set is a tag that defines a set of requirement groups that can share courses. A course share set enables two or more requirement groups to use the same courses. By using a course share set, one course can be used to satisfy all requirement groups that are tagged by the course share set number.

Note. The course share set is used only at the academic requirement group level and is established on the Course Share Sets page. To share courses at the requirement level, use the partition sharing option located on the Requirement Parameters page.

Defining the Requirement Group Detail

Access the Detail page.

Requirement Group		Parameters		Detail		Detail Parameters		Plans Required		Plans Appended	
Find View All First ◀ 1 of 1 ▶ Last											
Requirement Group:		000115		Description:		LAU GE Distribution					
Effective Date:		02/02/1900		Status:		Active					
Find View 1 ◀ 1-5 of 5 ▶											
+ -											
(*Line: 0010											
*Group Line Type:		Requirement									
Requirement:		000001082 DIST - Social Science									
Requirement Usage:		Academic Advisement									
+ -											
AND ▾ *Line: 0020											
*Group Line Type:		Requirement									
Requirement:		000001083 DIST - Sciences									
Requirement Usage:		Academic Advisement									
+ -											
AND ▾ *Line: 0030											
*Group Line Type:		Requirement									
Requirement:		000001084 DIST - Lit and Arts									
Requirement Usage:		Academic Advisement									

Detail page

Refresh Parentheses

Click to refresh (and display) the parentheses after you add any new detail lines. When you add new lines and connectors, the existing display may not show the parentheses in the correct position. To update the display of parentheses, save the page or click this button. You cannot explicitly set parentheses to group detail rows. This button is available only when you add an additional detail line. Click this button to show, not set, parentheses.

If the main connector type (which you specify on the Parameters page) is AND, then the system automatically creates partitions where AND is the main connector. For example, if you enter A OR B AND C OR D, then the implied statement is (A OR B) AND (C OR D). If the main connector type is OR, then the system creates partitions where OR is the main connector. For example, if you enter A OR B AND C OR D, then the implied statement is A OR (B AND C) OR D.

(Connector Type)	The system displays this field on all line numbers subsequent to the first line. Select a value to specify how a detail line connects to the previous detail line. If you select <i>NONE</i> , then the field value automatically populates the connector type on the Parameters page.
Line	The system generates this sequential line number. However, you can change the value. (Computer-generated line numbers are assigned in increments of 10.) This field value determines the order in which the system evaluates detail lines. When you insert a line, the system replaces the field value of <i>NEW</i> with the next sequential line number.
Group Line Type	Select the type of requirement group line to define. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Values are: <i>Course:</i> Select to specify a course that a student must take. This is less robust than using a requirement line that points to a course list. <i>Requirement:</i> Select to specify a requirement that a student must satisfy. Multiple requirement groups can point to a single requirement that was created only one time. As a result, for example, History 101 could satisfy a political science requirement as well as a history major requirement. <i>Wild Card Course:</i> Select to specify a course range based on values of the subject area and course catalog number using special wildcard characters. Equivalent courses are not included in this match. <i>Condition:</i> Select to specify a condition (or conditions) that the student must satisfy. For example, you can require the completion of a specific milestone.

Warning! Condition processing can be a powerful tool. However, complex condition processing and multiple condition processing take considerable processing time; therefore, you should use them only when needed.

If the group line type is *Condition*, then these fields are available:

Institution	This is a display-only field. Each requirement group is associated with only one academic institution.
Condition Code	Enter a condition code that indicates which field in the database you want the system to evaluate. For example, <i>Academic Level</i>, <i>Academic Plan</i>, <i>Academic Program</i>, and <i>Academic Sub-Plan</i> are condition codes. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Values are: <i>None:</i> No field value. <i>Academic Level:</i> Select to specify a student's year of study (for example, freshman, sophomore, junior, senior). The system evaluates this value against the student's level (defined in term statistics) based on the as of date that you specify at run time.

Academic Plan: Select to specify a student's plan (for example, major or minor) within the academic program.

Academic Plans: Select to specify that all of a student's plans are part of the equation.

Academic Program: Select to specify a student's program of study.

Academic Programs: Select to specify that all of a student's programs are part of the equation.

Academic Standing: Select to specify a student's academic standing at the institution. (For example, values might include good standing, probation, and dismissal. You define values on the Academic Standing Table page.) The system evaluates this value against the student's standing (defined in term statistics) based on the as of date that you specify at run time.

Academic Sub-Plan: Select to specify a student's subplan.

Academic Sub-Plans: Select to specify that all of a student's subplans are part of the equation.

Cumulative Grade Point Average: Select to specify a student's cumulative grade point average (derived from the student's term history cumulative statistics, in conjunction with the processing as of date).

Primary Academic Plan: Select to specify a student's primary academic plan, the plan designated by the lowest plan sequence number on the Student Plan page. (For example, under a program of LAU, a student might have two plans, PSYCH and CLASSICS MINOR. If PSYCH has a plan sequence number of 10 and CLASSICS MINOR has a plan sequence number of 20, then PSYCH is the primary academic plan. On the Student Plan page, the primary career is designated with the lowest student career number.)

Important! The primary academic plan is the plan designated by the lowest plan sequence number on the Student Plan page, and the primary academic program is the program designated by the lowest career sequence number on the Student Program page. However, if a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is that plan with the lowest plan sequence number under the program with the lowest student career number. For example, suppose that under a program of LAU (attached to a student career number of 0), a student has a plan of PSYCH with a plan sequence number of 10. The same student has a plan of ART with a plan sequence number of 10 under a program of FAU (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan. In this example, the primary plan is PSYCH, which is tied to a student career number of 0 through the LAU program.

Primary Academic Program: Select to specify a student's primary academic program, the program designated by the lowest career sequence number.

Student Group: Select to specify a student's academic group, such as athlete or veteran. You define values on the Student Group Table page.

Student Groups: Select to specify that all of the student groups to which the student belongs are part of the equation.

Table Entry: Select to specify a dynamic condition that you create in the Define Dynamic Condition component.

Important! When you enter a Condition Code field value, the Condition Operator and Condition Data fields appear on the page. If the Condition Code value is *Table Entry*, then only the Condition Data field is available.

Condition Operator

Select the type of comparison to apply to the condition data. Condition operators include *Equal*, *None*, *< or =*, *> or =*, *Greater*, *In*, *Less*, *Not Equal*, and *Not In*. *None* converts to *Equal*. Use an operator that makes sense in the equation.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Condition Data

Enter the value to check against the condition code. For example, specific academic plans and programs, as well as dynamic conditions, are condition data values. If the Condition Code value is *Table Entry*, then select a dynamic condition that you created previously.

If the Group Line Type is *Course*, then these fields are available:

Course ID

Enter the ID of the course needed to satisfy this requirement.

Include Equivalent Courses

Select to have the system to include in its evaluation both the course ID that you specify and all courses that are set up as equivalent to the selected course ID for this requirement, as established on the Course Equivalencies page. If you select this check box, then the following fields become unavailable: Term, Associated Class, and Topic ID.

Warning! The audit engine must search the database for any valid course equivalency, even if no equivalencies exist for this course. Therefore, clear the check box if the course ID has no equivalencies.

Clear this check box to further narrow your course parameters with the Term, Associated Class, and Topic ID fields. For example, you can specify not only the course ID, but also the term in which the student must take the specific course.

Term

Enter the term in which the student must take the course that you specify in order for the course to be used in this requirement group. Leave this field blank to return all values.

Associated Class

Enter the associated class number (of the course that you specify) that the student must take in order for the course to be used in this requirement group. For class associations, indicate a term to prompt from valid values. Leave this field blank to return all values.

Note. You cannot enter 9999, because this special associated class number can be associated with any other associated class number and is never an enrollment section.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Managing the Schedule of Classes,” Defining Class Associations.

Topic ID Enter the topic ID (of the course that you specify) that the student must take in order for the course to be used in this requirement group. This field prompts from the topics defined in the course catalog. Leave this field blank to return all values.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Setting Up the Course Catalog,” Defining Course Catalog Data.

If the Group Line Type is *Requirement*, then the following fields are available:

Requirement	Enter the requirement to associate with this requirement group.
Requirement Usage	The system displays the requirement’s usage. Requirement usage values are <i>Academic Advisement</i> , <i>Student Individualized Plan</i> , and <i>Requisite/Restriction</i> .

If the Group Line Type is *Wild Card Course*, then the following fields are available:

Academic Institution	This is a display-only field. Each requirement group is associated with only one academic institution.
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Important! If you do not enter an academic group, subject, or catalog number, the system returns all values.

Academic Group and Subject	Enter the appropriate academic group and subject of the course.
-----------------------------------	---

Catalog Nbr (catalog number)	Select the catalog number using a combination of real numbers, letters, pound sign symbols, and asterisks. The pound sign (#) is a wild card for the numeric portion of the catalog number and the asterisk (*) is a wild card for alpha portion of the catalog number. The catalog number field format is NNNNAAAAAA, where <i>N</i> indicates a numeric value and <i>A</i> indicates an alpha-numeric value. For example, a catalog number of 3## indicates that any 300 level course is acceptable, including 301A, because suffixes are ignored when you specify a number wild card, unless you exclusively indicate a suffix value. In another example, a catalog number field value of 3##B would exclude 301A. In a third example, a catalog number field value of 321* indicates that 321, 321A, and 321B (but not 321AB) are acceptable. You can use the wild card for any position in the field.
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When you use wild cards, courses that are equivalent to the wild card course that you specify are *not* evaluated. (This is an efficiency constraint.) In addition, requirement groups with a group line type of *Wild Card Course* act like requirements with a line detail type of *CLST* on the Line Item Detail page; they do not pull courses with no earned credit into the evaluation of the requirement group.

Important! The Catalog Nbr field does not support ranges. Instead, you must insert multiple detail lines. For example, in one detail line, you can use the wild card for all 100-level courses. In a second detail line, you can use the wild card for all 200-level courses. Then connect the two detail lines with the AND connector.

Setting Up the Requirement Group Detail Parameters

Access the Detail Parameters page.

The screenshot shows the 'Detail Parameters' page for a requirement group. The top navigation bar includes tabs for 'Requirement Group', 'Parameters', 'Detail', 'Detail Parameters' (which is active), 'Plans Required', and 'Plans Appended'. Below the tabs, there's a search bar with 'Find | View All' and a page indicator '1 of 1'. The main content area displays the following information:

- Requirement Group:** 000124
- Description:** BA in Math Requirements
- Effective Date:** 01/01/1900
- Status:** Active

Below this is a section titled 'Course Validation Parameters' with a search bar and a page indicator '1 of 3'. Under 'Course Information', there are several fields and checkboxes:

- Minimum Units:** [Text Input]
- Min Units/Course:** [Text Input]
- Minimum Courses:** [Text Input]
- Min Grade Points/Unit:** [Text Input]
- Transfer Level Allowed:** [Dropdown Menu] (Currently set to 'Always Allow')
- Requirement Designation:** [Text Input]
- Valid Begin:** [Text Input]
- Valid End:** [Text Input]
- ☐ Course must be GPA material
- ☒ Test Credit is Allowed
- ☒ Other Credit is Allowed
- ☐ Exclude In-Progress Credit

Detail Parameters page

Course Information

Displays course information from the Detail page.

Course information displays only if you selected a group line type of *Course*, or *Wild Card Course*.

Minimum Units

Enter minimum units for the class.

Min Units / Course

(minimum units per course)

Enter the minimum number of units that each course or wildcard course must provide to satisfy the requirement group.

Minimum Courses

Enter minimum number of courses required for this detail line.

Min Grade Points / Unit

Enter the minimum number of grade points per course unit that the student must attain for a course to be included in this detail line.

Transfer Level Allowed

Select the allowed type of transfer credit (if any) for the course.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Values are:

Always Allow: Select to specify that all applicable transfer credit can satisfy the requirement.

Four-Year Institution Only: Select to specify that only transfer credit from four-year institutions can be used to satisfy the requirement.

Never Allow: Select to specify that transfer credit can never satisfy the requirement.

Two-Year Institution Only: Select to specify that only transfer credit from two-year institutions can be used to satisfy the requirement.

None: converts to *Always Allow*.

Note. On the School Data page, you can define an external organization as a two- or four-year institution. The Advisement School Type field on the School Type Table page contains the value that drives the derived lists in academic advisement. Each school type may belong to an advisement school type.

Requirement Designation

Select to specify the course as valid only if it has this requirement designation associated with it. Typically, you attach this designation to a course, and it affects one section of that course. A requirement designation may reflect additional work that a student needs to complete in addition to the regular course. For example, the requirement designation might indicate that the course is valid only if it was taken with an optional extra credit requirement designation of architecture design credit. Depending on the setup data in the Requirement Designation Table page, a separate course grade may or may not be required for designation credit to be earned. If a separate requirement designation grade is required, then you must enter an RD (requirement designation) grade of *Satisfied* on the Grade Roster 2 page or the Student Enrollment 4 page for academic advisement to include the course. If a separate requirement designation grade is not required, then the student must earn a passing grade in the course to which the requirement designation is attached for designation credit to be granted. (You define the minimum grade needed for this default to take place.) If a requirement designation is required, then an RD grade of *Unsatisfied* (or no RD grade at all) causes the course to be rejected.

If a separate requirement designation grade is required but the course is still in progress, then the degree audit records the requirement designation as if it were satisfied.

See *PeopleSoft Enterprise Student Records 8.9 PeopleBook*, “Preparing for the Course Catalog and Schedule of Classes,” Understanding Requirement Designations.

Valid Begin and Valid End

Enter a date range to specify when the student must take this course to satisfy the requirement. Leave these fields blank to specify that the student can take the course during any time period. The system uses the start date of the term in which the student takes the course.

Course Must Be GPA Material (course must be grade point average material)

Select to specify that the course taken to satisfy this requirement group needs to be applied toward the student’s career grade point average calculation. The student cannot take the course on a pass/no pass or audit basis, but only for a grade.

Important! Only courses with grades for which you select the Include in GPA check box on the Grading Scheme Table page are eligible.

Test Credit is Allowed

Select to specify that the course can be originally from the test credit portion of the student’s academic record.

Other Credit is Allowed

Select to specify that the course can be originally from the other credit portion of the student’s academic record. Note that the system marks and treats internal transfer credit as enrolled credit.

Exclude In-Progress Credit Select to specify that the course must be fully graded in order for the system to consider it valid. If you do not select this check box, then the system includes a nograded course, a course with a grade of incomplete, or a course in progress as part of the academic analysis and the course satisfies all parameters. Typically, you use this check box for enrollment requisites on the Enrollment Requirement Group component. You do not usually use it for academic advising reports.

Example

In this example, the Exclude In-Progress Credit check box is selected. To fulfill the honors requirement, a student must have a minimum 3.5 verifiable cumulative GPA. To build this requirement, create an academic requirement group with the following two detail lines:

Detail line 1: Condition line type of cumulative GPA $\geq$ 3.5

AND

Detail line 2: Wild Card Course line type.

On the Parameters page, enter a Minimum Courses field value of *1*. On the Detail page, create a detail line with a Group Line Type field value of *Condition*. On the same page, create a second detail line with a Group Line Type value of *Wild Card Course*. On the Detail Parameters page for detail line 2, select the Exclude In-Progress Credit check box. Now the system verifies that the student has a cumulative GPA of $\geq$ 3.5 and is not a first semester student with only in-progress courses.

Remember, if the Exclude In-Progress Credit check box is not selected, then even those students who have no coursework completed, but who have at least one course in progress, will meet this requirement.

You can click the links at the bottom of this page to access other pages in this component.

See Also

PeopleSoft Enterprise Recruiting and Admissions 8.9 PeopleBook, “Setting Up Prospects,” Setting Up School Types

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up Transfer Credit Processing,” Defining External Organizations

Specifying Required Plans and Sub-Plans

Access the Plans Required page.

The screenshot displays the 'Plans Required' tab within a software interface. At the top, there are navigation tabs: 'Requirement Group', 'Parameters', 'Detail', 'Detail Parameters', 'Plans Required' (selected), and 'Plans Appended'. Below these, a header bar contains 'Find | View All' and '1 of 1'. The main content area shows fields for 'Requirement Group: 000124', 'Description: BA in Math Requirements', 'Effective Date: 01/01/1900', and 'Status: Active'. A checkbox labeled 'Other Plans/Sub-Plans Required' is checked, and a 'Number Required' field is set to '1'. Below this is a section titled 'Plans/SubPlans Required' with its own 'Find | View All' and '1 of 1' controls. This section contains a table with one row: '*Plan Sequence: 1', 'Academic Institution: PeopleSoft University', 'Academic Career: Graduate', 'Academic Program: ' (empty), '*Academic Plan: ' (empty), and 'Academic Sub-Plan: ' (empty). Each of the last four fields has a magnifying glass icon next to it.

Plans Required page

Other Plans/Sub-Plans Required

Select to require that students in this career, program, or both declare a plan or subplan. If you select this check box, then you do not have to enter information on the Detail page. The Detail page is not required because the system considers the required plans and subplan information as the requirement group detail.

Number Required

Enter number of plans or subplans (from the list that you specify) that the student must declare. If you leave this field blank, then all plans and subplans that you list are required. For example, if this were a business major requirement group, then you could insert subplans here for each business major area of specialization, then enter a number required value of 1, to specify that all business majors must declare at least one subplan in one of the areas that you define.

Plan Sequence

Enter the search order of multiple plans or subplans, if any. The system first determines whether the student has the item that you list with the lowest sequence number, and continues searching until it finds a match.

Academic Institution, Academic Career, and Academic Program

Display-only fields. These values reflect the data on the Requirement Group page.

Note. If you do not enter an academic program on the Requirement Group page, then the system populates the *Academic Program* field when you enter an *Academic Plan* (if the academic plan is tied to a program).

Academic Plan

Enter the required plan (for example, major or minor) for students in the academic program, the career, or both that you specify on the Requirement Group page.

Academic Sub-Plan

Enter the required subplan (for example, specialization or concentration) for students in the academic plan or career that you specify on the Requirement Group page.

Example

To graduate with a BA in English, a student must declare a career of UGRD, a program of LAU, and a plan of ENGLISH. This student must also satisfy one of three subplans: CREATIVE WRITING, LITERATURE, or CLASSICS.

Use this page to specify that a subplan is necessary for graduation. Select the Other Plans/Sub-Plans Required check box. Enter 1 in the Number Required field. For Plan Sequence 1, enter an academic plan of *ENGLISH* and an academic subplan of *CREATIVE WRITING*. For plan sequence 2, enter an academic plan of *ENGLISH* and an academic subplan of *LITERATURE*. For plan sequence 3, enter an academic plan of *ENGLISH* and an academic subplan of *CLASSICS*.

When the student declares a subplan on the Student Program page, the degree audit report lists the requirement groups that are satisfied or that need to be satisfied for the subplan. Until the student declares a subplan, the degree audit report indicates that a required subplan has not been satisfied, so the entire advisement report is not satisfied.

You can click the links at the bottom of this page to access other pages in this component.

Identifying Appended Requirement Groups

Access the Plans Appended page.

The screenshot shows the 'Plans Appended' page in a web application. The page has a navigation bar with tabs: Requirement Group, Parameters, Detail, Detail Parameters, Plans Required, and Plans Appended. The 'Plans Appended' tab is selected. Below the tabs, there is a search bar with 'Find | View All' and a '1 of 1' indicator. The main content area displays the following information:

- Requirement Group:** 000124
- Description:** BA in Math Requirements:
- Effective Date:** 01/01/1900
- Status:** Active

Below this information is a section titled 'Include Requirement Groups for:' with a blue header. Under this section, there are five fields, each with a search icon:

- Academic Institution:** PeopleSoft University
- Academic Career:** [Empty field]
- Academic Program:** [Empty field]
- Academic Plan:** [Empty field]
- Academic Sub-Plan:** [Empty field]

Plans Appended page

You can attach requirement groups from a different academic structure (career, program, plan, and subplan) to the single requirement group identified by this page. For example, a mathematics premajor requirement group might contain the same requirements as the computer science certificate academic plan. Use this page to append the computer science plan requirements to the mathematics premajor requirement group. In most instances, this functionality is used to minimize duplication of academic requirement groups. If you have two careers, programs, plans, or subplans that have virtually identical requirements, you can create them for one of the two groups and then simply append the requirements to the other group through the Plans Appended page.

If you use this page, then the Detail page is not required because the appended requirement group plans are considered as the requirement group detail.

Appended requirement group information prints on the audit report with the requirement group to which it is attached. Therefore, if a requirement group is appended to a career-level requirement group, then the appended group information is printed with the career-level requirement groups.

**Academic Career,
Academic Program,
Academic Plan, and
Academic Sub-Plan**

Enter the data that matches the existing requirement groups that you want to append. The system uses this data during analysis to search for requirement groups that match the structure defined on this page. The system ignores blank fields, and a requirement group is appended only if all the nonblank field values match exactly.

CHAPTER 7

Reviewing the Requirement Group, Requirement, and Course List Summaries

This chapter discusses how to:

- Review academic requirement group summaries.
- Review academic requirement summaries.
- Review advisement course list summaries.

Reviewing Academic Requirement Group Summaries

Use the Academic Requirement Group Summary component to view summaries of academic requirement groups, which include detail about each group's academic requirements and requirement lines. Each academic requirement group consists of these items:

- A unique requirement group number.
- Detail lines that point to conditions, courses, and requirements.
- Parameters that include unit, course, and grade point average requirements.

This component is shared with PeopleSoft Enterprise Student Records, where you can view enrollment requirement group rules.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up Enrollment Requisites,” Viewing Enrollment Requisite Summary Information

Pages Used to Review Academic Requirement Group Summaries

Page Name	Object Name	Navigation	Usage
Requirement Group Summary	ADVIS_RQ_GRP_SUMM	Academic Advising, Summaries, Academic Requirement Groups	Review a summarized listing of the requirements contained in an academic requirement group. Line details and connectors are listed.
Requirement Group Description	RQS_SUMM_DESC	Academic Advising, Summaries, Academic Requirement Groups. Click the requirement group name.	Review the description of the academic requirement group.
Requirement Summary	ADVIS_RQ_SUMMARY	Academic Advising, Summaries, Academic Requirement Groups. Click the specific academic requirement.	Review summaries of the academic requirement lines in a specific academic requirement. Each requirement consists of detail lines pointing to conditions, courses, and requirements as well as parameters that include unit and course requirements.
Requirement Description	RQ_SUMM_DESC	Academic Advising, Summaries, Academic Requirement Groups. Click requirement group name. Click the requirement name on Requirement Summary page.	Review the description of the academic requirement, which automatically populates from the Academic Requirements component.
Requirement Line Description	RQ_LN_SUMM_DESC	Academic Advising, Summaries, Academic Requirement Groups. Click the requirement name to access the Requirement Summary page. Click a specific academic requirement line.	Review the long description and requirement description for a specific academic requirement line.

Reviewing Academic Requirement Summaries

Use the Academic Requirement Summary component to review a summary of a specific academic requirement.

These pages are the same as the corresponding pages of the Academic Requirement Group Summary component. However, through the Academic Requirement Summary component, they provide a direct view of academic requirements as they exist separate from academic requirement groups.

See Also

Chapter 5, “Setting Up Academic Requirements,” page 31

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up Enrollment Requisites,” Viewing Enrollment Requisite Summary Information

Chapter 7, “Reviewing the Requirement Group, Requirement, and Course List Summaries,” Reviewing Academic Requirement Group Summaries, page 109

Reviewing Advisement Course List Summaries

Use the Advisement Course List Summary component to review a summary of specific academic course lists, including descriptions of each course on an academic course list. This component is shared with PeopleSoft Enterprise Student Records, where you can view enrollment course list details.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up Enrollment Requisites,” Viewing Enrollment Requisite Summary Information

Chapter 4, “Setting Up Academic Course Lists,” page 21

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Setting Up Enrollment Requisites,” Defining Enrollment Course Lists

Pages Used to Review Advisement Course List Summaries

Page Name	Object Name	Navigation	Usage
Course List Summary	RQ_COURSELIST_SUMM	Academic Advising, Summaries, Academic Course Lists.	View a summary of a specific academic course list.
Course Description	CLST_SUMM_DESC	Academic Advising, Summaries, Academic Course Lists Click a specific course.	View the course description for a specific course ID on an academic course list.

CHAPTER 8

Sharing Courses

This chapter provides an overview of sharing courses and discusses how to set up course share sets.

Understanding Course Sharing

By default, a course cannot be used by more than one requirement group. However, by using a course share set, courses can be shared by more than one requirement group. A course share set is a tag that defines a set of requirement groups that can share courses.

Use course share sets after you define the requirement groups, requirements, and course lists. The course share set is used only at the academic requirement group level. A requirement group can reference a maximum of 30 share sets. However, a course can only be shared between six requirement groups that use share sets. Finally, the advising process can evaluate no more than 200 course share sets per report.

Course share sets are only necessary if the requirements capture course statistics through a requirement line whose credit include mode is *All Stats*. If the requirement only verifies course information (where the credit include mode is *Verify*), then all of the courses are verified, whether or not the system has used them in the audit. Therefore, it is not necessary to include course share sets with requirement groups that are only verifying courses.

By limiting the number of requirement groups within a share set, you can reduce processing time.

If you can attach all of the courses (that you want to share) within the same requirement group, use partition sharing. Partition sharing within a requirement group can be more efficient for the advisement report process than the use of course share sets.

See Also

[Chapter 6, “Setting Up Academic Requirement Groups,” page 79](#)

Setting Up Course Share Sets

This section discusses how to set up course share sets and provides a course share set example.

Here's how to share courses:

1. Define as many course share sets as necessary on the Course Share Sets page.
2. Indicate on the Requirement Group Parameters page whether a requirement group belongs to a course share set that enables it to share courses with another group.

Page Used to Set Up Course Share Sets

Page Name	Object Name	Navigation	Usage
Course Share Sets	CRSE_SHARE_SET	Academic Advising, Academic Requirements, Define Course Share Sets	Establish course share set number. The course share set number is placed on two or more requirement groups to allow them to share courses.

Establishing Course Share Sets

Access the Course Share Sets page.

Course Share Sets

[Find](#) | [View All](#)
First 1 of 1 Last

Course Share Set: 000000010 + -

***Effective Date:** 02/02/1900 31 Active

***Description:** Psych/GE Share

Requirement: 000001133 🔍 Restrict Psych

Requirement Groups in Share Set Customize | Find 1-2 of 2

		Description	Short Description	Short Description	Description
000115	LAU GE Distribution	PeopleSoft University	Undergrad	Lib Arts	
000116	Psychology Requirements	PeopleSoft University	Undergrad	Lib Arts	Psychology

Course Share Sets page

Course Share Set

Displays the identifying number of the tag that you are establishing. This tag defines the requirement groups that can share courses. The course share set number is used on the Requirement Group Parameters page.

Effective Date

Enter the effective date that defines what requirement version is used for the requirement course share restriction. In regards to requirement groups, a course share set has no effective date. In addition, the effective date does not reflect on a student's requirement term.

Description

Enter a description of the course share set.

Requirement

(Optional) Enter the academic requirement number that places restrictions on course sharing for this share set.

The academic requirement must have a usage value of *Requirement Course Share Restriction*. Requirement course share restrictions are established in the Academic Requirements component.

It is not necessary to enter a value in the Requirement field. If no value is entered, then there is no restriction on which courses or units can be shared. For restricted sharing, specify a requirement. Restricted sharing is necessary if you want to limit the number of courses or units that can be shared. When a value is entered in the Requirement field, then the course share set can only share those courses or units permitted by the requirement.

Requirement groups that appear in the Requirement Groups in Share Set group box are the groups that use the share set. More than one group must be listed in order for sharing to be in effect.

Note. After you establish and use a course share set on the Requirement Group Parameters page, the requirement groups that are affected are listed on the Course Share Sets page under the appropriate course share set.

Example

In this example, requirement 1133 restricts course sharing for course share set 10:

Course Share Sets

Find | View All First 1 of 1 Last

Course Share Set: 000000010

***Effective Date:** 02/02/1900 Active

***Description:** Psych/GE Share

Requirement: 000001133 Restrict Psych

Requirement Groups in Share Set Customize | Find 1-2 of 2

		Description	Short Description	Short Description	Description
000115	LAU GE Distribution	PeopleSoft University	Undergrad	Lib Arts	
000116	Psychology Requirements	PeopleSoft University	Undergrad	Lib Arts	Psychology

Example of Course Share Sets page

In this example, academic requirement 1133 restricts psychology sharing to one course:

Requirement Parameters Line Item Line Item Parameters Line Item Detail

Find | View All 1 of 1

Academic Requirement: 000001133

***Effective Date:** 01/01/1900 ***Status:** Active

***Description:** Restrict Psych

***Short Description:** Psych ***Usage:** Rq Course Share Restrictn

***Long Description:** Restrict Psych sharing to one course

***Academic Institution:** PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Academic Program:

Academic Plan:

Academic Sub-Plan:

Pre-Condition: None

Example of Requirement page

There is one requirement line contained in this requirement. Requirement course share restriction usage can use one line type only: *Unit*, *Course* or *GPA Limit*.

Requirement Parameters **Line Item** Line Item Parameters Line Item Detail

Find | View All 1 of 1

Academic Requirement: 000001133 **Description:** Restrict Psych
Effective Date: 01/01/1900 **Status:** Active

Line Item Find | View All 1 of 1

Refresh Parentheses Line: 0010

*Line Type: Unit, Course or GPA Limit Institution: PSUNV
 *Description: restrict *Short Description: restrict
 *Long Description: restrict
 Pre-Condition: None

Example of Line Item page

The line number allows only one course. A blank value in either the Maximum Units Allowed field or the Maximum Courses Allowed field indicates that you cannot share courses. Enter a value in both fields, if you want to restrict sharing to a certain number of units and courses.

Requirement Parameters Line Item **Line Item Parameters** Line Item Detail

Find | View All 1 of 1

Academic Requirement: 000001133 **Description:** Restrict Psych
Effective Date: 01/01/1900 **Status:** Active

Line Item Parameters Find | View All 1 of 1

Line Nbr: 0010 Description: restrict
 Minimum GPA: Maximum GPA Allowed:
 Maximum Units Allowed: 3.00
 Maximum Courses Allowed: 1.00

*Course Ranking Scheme: Chronological *Reporting: Always Report
☐ Override Standard Set Logic

Background Key

Line Nbr: 0010 Description: restrict
☐ Count Attempts Print Control: Print on audit reports

Example of Line Item Parameters page

The line item detail should contain the type of courses to be limited. In this example, the limit is on all psychology courses, which must be intersected by the derived course list of used by requirement group (or used by requirement) to create the limit target.

Requirement	Parameters	Line Item	Line Item Parameters	Line Item Detail
Academic Requirement: 000001133 Description: Restrict Psych Effective Date: 01/01/1900 Status: Active				
Line Item Find View All 1 of 1				
Line Nbr: 0010 Descr: restrict				
Line Item Detail Find View 1 1-3 of 3				
*Line Detail Sequence: 1 *Line Detail Type: CLST Course List Course List: 000000069 View All Psych Courses				
*Line Detail Sequence: 2 *Line Detail Type: DLST Derived Course List List Include Mode: I Intersection with List Recall Mode: Used by Requirement Group ☒ Ignore Missing Target Requirement Group: 000115 LAU GE Distribution				
*Line Detail Sequence: 3 *Line Detail Type: DLST Derived Course List List Include Mode: I Intersection with List Recall Mode: Used by Requirement Group ☒ Ignore Missing Target Requirement Group: 000116 Psychology Requirements				

Example of Line Item Detail page

Note. Requirements with a usage value of *Requirement Course Share Restriction* must intersect with the target requirements. For example, if a share set has three requirement groups but only two are restricted in sharing, the requirement that restricts needs two additional detail lines: Used by Requirement 1234, and Used by Requirement 3456, plus, a third detail line of the courses that are being restricted.

CHAPTER 9

Using Advisement Overrides and Course Substitutions

This chapter provides an overview of advisement overrides and course substitutions, lists prerequisites, and discusses how to:

- Set up course directives and advisement overrides.
- Define course substitutions.

Understanding Advisement Overrides and Course Substitutions

Use advisement overrides and course substitutions to modify existing requirements and make exceptions for a specific student.

Advisement overrides enable you to override any part of a student's degree requirements. Standard requirements can be overridden or an entire program can be configured for a specific student or group of students. Course directives are a type of advisement override. These mandate (or direct) where specific courses will or will not be used to satisfy requirements. For example, you can direct that a course be used toward satisfying a student's major requirements, but not general education requirements. Course directives are a method of course override.

Course substitution enables you to select a course to use in place of the required course. Substitutions can be set up in advance or after course completion. For example, transfer work in the Summer session can be preapproved, so it is automatically calculated in the Fall session.

There are three ways to make academic advisement exceptions for a student:

- Use the Authorize Student Exceptions page to direct where specific courses are to be used to satisfy requirements.

This is the preferred way to create a course substitution.

- Change, override, or waive a requirement using the Authorize Student Exceptions page.
- Substitute one course for a required course on the Course Substitution page.

Prerequisites

Before you begin, you must set up these items:

- Academic course lists.
- Academic requirements.
- Academic requirement groups.

See Also

[Chapter 4, “Setting Up Academic Course Lists,” page 21](#)

[Chapter 5, “Setting Up Academic Requirements,” page 31](#)

[Chapter 6, “Setting Up Academic Requirement Groups,” page 79](#)

Setting Up Course Directives and Advisement Overrides

This section provides an overview of course directive and advisement override setup and discusses how to:

- Create advisement overrides.
- Create override details on the From page.
- Create override details on the To page.

Understanding Course Directive and Advisement Override Setup

Use the Authorize Student Exceptions component to create an advisement override. An advisement override can act to direct a course, change a requirement, override a requirement, or waive a requirement. An established override enables you to override a course, a requirement, a requirement line, or a requirement group. Once you establish an override, it is always available for editing or revising.

When you enter any course directives or override exceptions into the database, the system records the user’s ID for security and traceability reasons. This audit trail prints on the degree audit report.

Pages Used to Set Up Course Directives and Overrides

Page Name	Object Name	Navigation	Usage
Authorize Student Exceptions	AA_OVERRIDE	Academic Advising, Student Advisement, Authorize Student Exceptions	Create an advisement override.
From	AA_RQRMNT_GRP_INFO	Click the Create Exception link on the Authorize Student Exceptions page.	Record the specifics of an advisement override.
To	AA_OVRD_RQ_GRP_I	Click the Create Exception link on the Authorize Student Exceptions page.	Record the specifics of an advisement override.

Creating Advisement Overrides

Access the Authorize Student Exceptions page.

Authorize Student Exceptions

Find | View All First 1 of 1 Last

Advisement Override: 000000002 **User ID:**

***Effective Date:** 06/22/1998  ***Status:** Active 

***Description:** Psych Statistics **Short Description:** Psych Stat

Long Description: Replace Psych Statistics with General Statistics during Fall 98 term because Psych Statistics will not be offered that semester and many Psych majors need to take the course to fulfill later pre-requisites. 

Override Detail

***Academic Institution:** PSUNV  PeopleSoft University

***Academic Career:** UGRD  Undergraduate

Academic Program: LAU  Liberal Arts Undergraduate [Create Exception](#)

Academic Plan: PSYCH  Psychology

Academic Sub-Plan: 

***Selection Code:** Primary Academic Plan 

***Selection Data:** PSYCH  Psychology

***Operation Code:** Course Directive 

Authorize Student Exceptions page

Note. The system uses overridden data for the degree audit report only. Original data that you recorded in all of the other PeopleSoft Enterprise Campus Solutions pages remains unchanged.

Advisement Override	Displays an automatically assigned sequential number that is unique for each override.
User ID	Displays the ID of the user who created the advisement override.
Effective Date	The latest effective date for this advisement override defines whether or not the advisement override is used. If an advisement override has an effective date prior to the as-of-date value on the Request Detail page of the transcript request, then the override will be in effect. However, if the effective date is later than the as-of-date value, the override will not be in effect and will be ignored. For example, suppose that the effective date is 01/01/2001 and the as-of-date value is 09/19/2000, the system ignores the override.
Description, Short Description, and Long Description	Enter descriptions. Use the description and short description field values for documentation purposes only. The long description field value prints on the audit report.
Academic Institution	Select the academic institution that is affected by this advisement override. Each advisement override is associated with one academic institution only. A value in this field is required.

Academic Career	Enter the academic career that contains the course, requirement line, requirement, or requirement group that is the subject of the override. A value in this field is required.
------------------------	---

Note. Academic Program, Academic Plan, and Academic Sub-Plan fields can be blank as long as the subject of the override exists at the career level or higher.

Academic Program	Enter the academic program whose requirement groups (which contain the requirement, requirement line, and courses) are the subject of the override. A value in this field is optional.
-------------------------	--

Academic Plan	Enter the academic plan whose requirement groups (which contain the requirement, requirement line, and courses) are the subject of the override. A value in this field is optional.
----------------------	---

Academic Sub-Plan	Enter the academic sub-plan whose requirement groups (which contain the requirement, requirement line, and courses) are the subject of the override. A value in this field is optional.
--------------------------	---

Selection Code	Select the selection code that determines who or what the override affects. Values include:
-----------------------	---

Primary Academic Plan: Indicates that the override applies to all of the students in the specified primary plan.

Academic Program: Indicates that the override applies to all of the students in the specified program.

Student Group: Indicates that the override applies to all of the students in the specified student group.

Student: Indicates that the override applies to a single student.

Selection Data	Enter the field value that is appropriate for the selection code. Values are based on the selection code field value that you entered. For example, suppose that you selected <i>Student Group</i> as the selection code. Then the only values available in the Selection Data field are student groups. If you select <i>Student</i> as the selection code, then only the student's ID can be entered in the Selection Data field.
-----------------------	---

Operation Code	Select the operation code that indicates the type of advisement override. Values include: <i>Course Directive:</i> Indicates that the override directs where you can use a specific course to satisfy a requirement. For example, you can direct a course to satisfy a major requirement, not a general education requirement. <i>Requirement Change:</i> Indicates that the override acts as a change to a specific requirement. <i>Requirement Override:</i> Indicates that you can override a specific requirement with a student individualized plan requirement. <i>Requirement Waiver:</i> Indicates that the override waives a specific existing requirement.
-----------------------	--

Note. If the Operation Code field value is *Course Directive*, then the Level field is not applicable. Course directives can only be accomplished at the requirement line level.

Level Enter the field value that indicates the level at which the operation code works. If the operation code is *Requirement Change* or *Requirement Waiver*, then the Level field values include *LN*, *RG*, and *RQ*. If the operation code is *Requirement Override*, then the Level field values include *RG* and *RQ*. *LN* indicates that the operation code works at the requirement line level. *RG* indicates that the operation code works at the requirement group level. *RQ* indicates that the operation code works at the requirement level.

Create Exception Click this link to access the From page and To page, where you can record the specifics of an advisement override.

Creating Override Details on the From Page

Access the From page.

From

To

Requirement Group	Academic Requirement	Line Nbr
000116 Psychology Requirements	000001089	0010 Psych Stats

From page

Note. Fields available on the From and To pages depend on the information that you entered on the Authorize Student Exceptions page.

Enter those specific items that you want to override and change. Based on the information entered on the Authorize Student Exceptions page, only relevant fields appear on this page. For example, if on the Authorize Student Exceptions page you select the operation code *Requirement Waiver* and enter a level of *LN* (requirement line), then you must enter a requirement group, academic requirement, and requirement line on the From page. In other words, you must tell the system what requirement line you want to change.

In addition, the system filters prompt values based on the information that you entered on the Authorize Student Exceptions page. For example, on the Authorize Student Exceptions page you enter values for academic institution, academic career, academic program, and academic plan. On the From page, you prompt only on those requirement groups defined at the academic plan level. That is, you prompt only on requirement groups whose academic structure matches that entered on the Authorize Student Exceptions page.

Creating Override Details on the To Page

Access the To page.

From

To

Find 1 of 1

*Course Sequence: 0001

*Directive Type: Substitute

Course Source: Course Offerings

Search

Subject: STATS

Catalog: 100

Statistics 100

Course ID: 001151

Offer Nbr:

Acad Group: ENGR

Term: 0330

1998 Fall

Directed Units: 3.00

Min Grade Points/Unit: 2.00

Directed Courses: 1.00

Course Topic ID:

To page

Only relevant fields appear on this page. The system filters prompt values based on the information that you entered on the Authorize Student Exceptions page and the From page. There may not be any fields on this page, depending on the information that you entered on previous pages.

When you select the *Course Directive* operation code on the Authorize Student Exceptions page, the system displays a number of fields on the To page.

Directive Type

Select *Substitute* to replace one course for another.

Select *Exclude* to exclude courses from being used in the degree audit. The information that you enter on the From page dictates what courses are excluded.

Course Source

Enter the value that represents the courses from which to select for the substitution.

Offerings: Indicates all courses for the institution. From the institutions offerings, you can then select a specific course ID, subject, catalog number, and course offering. This is the default value.

When the selection code on the Authorize Student Exceptions page is *Primary Academic Plan*, *Academic Program*, or *Student Group*, *Offering* is the only available course source.

Enrollment, *Other Credit*, *Test Credit*, *Transfer*: Indicate that the courses from which to choose are based on the student's transcript. They are courses in which the student enrolled, or posted to a transfer, test, or other credit model.

These four options are only available when the selection code on the Authorize Student Exceptions page is *Student*.

Search

Click to access the Student Course Directive Search page, where you enter or a subject area. (If you do not know the subject area, you can use the prompt to look up the subject area.) Click the button again to access the Course Selection page, where you can select from among the courses listed.

Using the search feature, you can find and select a particular course ID, offering number, class number, and section number for regularly enrolled courses, and model, group and sequence number for transfer, test, and other credit. Unit earned, grades, and requirement designations values are also noted on the search record.

Note. When the course source is *Offerings*, you must enter a subject area prior to clicking Search on the Student Course Directive Search page. However, when the course source is another value, you do not need to enter a subject area. Simply click on Search and the system returns a list of courses from the student's enrollment or transfer records.

Term

Enter a term value to indicate that the directive applies only when the student takes the course in the specified term. This field is only available when the course source is *Offerings*.

Directed Units

Enter the number of units you want used in the audit. A value in this field is optional.

Directed Courses

Enter the number of courses you want used in the audit. A value in this field is optional.

Course Topic ID

Enter a course topic ID to further define a specific course to be used in the exception. When the course source is *Offerings*, you can enter a value in this field to ensure that the directive will apply only if the student takes the course with this topic ID. This field is unavailable when the course source is *Othr Cred*, *Test Cred*, or *Transfer*. A value in this field is optional.

Example

To waive a requirement line that exists at the plan (PSYCH) level for a particular student:

- Enter *PSUNV* as the academic institution, *UGRD* as the academic career, *LAU* as the academic program, and *PSYCH* as the academic plan.
- Enter *Student* as the selection code and enter (*AA0015*) as the student's ID in the Selection Data field.
- Enter *Requirement Waiver* as the operation code.
- Enter *LN* in the Level field.

Authorize Student Exceptions

Find | View All First 1 of 1 Last

Advisement Override: 000000016 User ID:

*Effective Date: 02/02/1900 *Status: Active

*Description: Waive Psych Stats Short Description: WaiveStats

Long Description: Waive Psych Stats

Override Detail

*Academic Institution: PSUNV PeopleSoft University

*Academic Career: UGRD Undergraduate

Academic Program: LAU Liberal Arts Undergraduate [Create Exception](#)

Academic Plan: PSYCH Psychology

Academic Sub-Plan:

*Selection Code: Student

*Selection Data: AA0015

*Operation Code: Requirement Waiver

Level: LN Rq Line

Using the Authorize Student Exceptions page to waive a requirement

Click the Create Exception link to access the From and To pages. Finish setting up the override.

From To

Requirement Group	Academic Requirement	Line Nbr
000116 Psychology Requirements	000001089	0010 Psych Stats

Using the From page to waive a requirement

Note. Because this is a waiver, the To page is not needed. You only need to reference the waived requirement line.

Defining Course Substitutions

This section provides an overview of course substitutions and discusses how to set up course substitutions.

Understanding Course Substitutions

Course substitution is one type of student-specific exception. Each course substitution is student-specific and defined with that student in mind. Substitutions affect a student's career. Each career can contain course substitutions. A student with multiple careers can have multiple course substitutions that are relevant to a specific career.

Note. Course substitution does not apply across careers. When you create a course substitution where the original course and the substituted course are from different careers, the substitution is not effective. To make the substitution, the course must first be transferred into the target career and then substituted.

You can substitute any course for any other course, whether or not it appears on a student's transcript. An advisor can substitute a course that the student completes in some future term. If the student never takes the course, the substitution is not processed.

Once a course has been identified as a substitute for another course, its former identity no longer exists. The course substitution process literally changes the course identity to that of a new course.

Note. When you run a degree audit report, the original course appears with a note indicating the course that you selected was substituted for the required course. The selected course is treated for advisement purposes as if it were the original required course.

Warning! Course substitution does not work when applying a what-if course list scenario.

See Also

Chapter 12, "Processing Academic Advisement Reports," Producing Quick What-If and Stored What-If Advisement Reports, page 174

Page Used to Define Course Substitutions

Page Name	Object Name	Navigation	Usage
Course Substitution	STDNT_CRS_SUBS	Academic Advising, Student Advisement, Create Course Substitution	Substitute one course for another course.

Setting Up Course Substitutions

Access the Course Substitution page.

Course Substitution

Name: Kimberly Adams **Student ID:** AA0001

Academic Career: Undergraduate **Student Career Nbr:** 0

Find | View All 1 of 1

***Substitution Seq:** ***Course Source:**

***Long Description:**

Select Course:	Search	003294	Engl Lit	210	African Am Writ
Substitute for:	Search	003276	Engl Lit	102	Survey of American Literature

Course Substitution page

Academic Career	Displays the student's academic career.
Student Career Nbr (student career number)	Displays a sequentially assigned number that indicates each student's career. The value appears automatically from the Student Program page. This number indicates which career is affected by the substitution.
Substitution Seq (substitution sequence)	Enter the sequence number. This number tracks this course substitution. The number is a sequential number that is automatically assigned by the system. The user can override this number, but it is not recommended. Each substitution sequence number reflects one course substitution. A student can have multiple course substitutions.
Course Source	Select the appropriate course source for this course substitution. This field indicates the source of available courses from which you can select a course substitution. Values are: <i>Course Offerings:</i> Includes all of the courses. There are no career or enrollment restrictions on which courses are available. <i>Enrollment:</i> Includes courses in which the student enrolled. There is no career restriction on what courses are available. This field is used for prompting, not analysis. <i>Other Credit, Test Credit, or Transfer Courses:</i> Includes credit and courses that the student received from other sources, rather than course offerings and enrollment. These values prompt only on courses in the academic career. Use this field for prompting, not analysis. Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.
Long Description	Enter a long description of the course substitution.
Select Course and Search	Displays the substitute course. Click the Search button to select from a list of available substitute courses. The system bases the list on your course source setting. If you have selected any course source other than course offerings, the system lists courses or credit work that the student has on record.

Substitute for and Search

Displays the course for which you are assigning a substitute course. Click the Search button to select from a list of available courses.

CHAPTER 10

Creating and Using Expanded Conditions and Custom Conditions

This chapter discusses how to:

- Define expanded conditions.
- Define custom conditions.
- Establish condition parameters.
- Specify condition controls.

Defining Expanded Conditions

This section provides an overview of expanded conditions and discusses how to:

- Enhance system performance using expanded conditions.
- Define academic entity groups.
- Define dynamic conditions.

Understanding Expanded Conditions

Expanded conditions consist of entity groups and dynamic conditions. You can use entity groups and dynamic conditions as preconditions or conditions within requirements and requirement groups.

An academic entity group consists of similar items (programs, plans, subplans, or student groups) that are grouped together for more efficient use as a single precondition or condition. For example, an entity group might include all of the programs within a career or multiple plans within a program.

Dynamic conditions are multi-dimensional condition values; for example, academic plan = psych AND cumulative GPA > 3.0. You use dynamic conditions as preconditions or condition lines in requirement groups or requirements.

Here's how to create entity groups:

1. Enter the effective date, institution, description, and entity group type information for the new academic entity group on the Entity Group page.
2. Use the Entity Group page to establish the details of individual entity group items that comprise the academic entity group.

Here's how to create dynamic conditions:

1. Use the Condition Line page to create a condition specification.

The description, connector type, and condition lines within the condition specification are established on this page.

2. Create parameters for the condition specification on the Condition Parameters page.
3. Use the Condition Controls page to record milestones when using the delivered User Programmable Condition of Milestone Check.

Enhancing System Performance Using Expanded Conditions

The time it takes to run a degree audit can be greater when you use entity groups and dynamic conditions, so you should use them sparingly.

If you must use entity groups, limit the number of rows within the entity group setup. The number of rows that exist in the entity group determines how many trips the system makes to the database in order to determine a true or false value. Sometimes it is possible to utilize the opposite operator, for instance *NOT IN*, within a degree requirement to reduce the number of rows the system must evaluate. For example, suppose that a requirement should be evaluated for all of the students *except* those in one particular student group. Rather than establishing an entity group with all student groups except that one and using an operator of *IN*, create an entity group with only that particular student group that you want to exclude and use an operator of *NOT IN*.

Pages Used to Define Expanded Conditions

Page Name	Object Name	Navigation	Usage
Entity Group	AA_IN_CONDITION1	Academic Advising, Academic Requirements, Define an Entity Group	Define the academic entity group to be used as a precondition or condition requirement.
Condition Line	RQ_CONDITION	Academic Advising, Academic Requirements, Define Dynamic Condition	Create a condition specification.
Condition Parameters	RQ_CONDITION_PARM	Academic Advising, Academic Requirements, Define Dynamic Condition, Condition Parameters	Establish condition parameters.
Condition Controls	RQ_CONDITION_CTRL	Academic Advising, Academic Requirements, Define Dynamic Condition, Condition Controls	Stipulate condition controls.

Defining Academic Entity Groups

Access the Entity Group page.

Entity Group

Find | View All First 1 of 1 Last

Academic Entity Group: 000009

***Effective Date:** 01/01/1900

***Status:** Active

***Academic Institution:** PSUNV PeopleSoft University

***Description:** Fine Arts Majors **Short Description:** Fine Arts

Long Description: Fine Arts Majors

***Entity Group Type:** Plan

Entity Group Item Detail Customize | Find | First 1-4 of 4 Last

	Academic Plan	Description		
1	ART	Art (BFA)	+	-
2	ARTHIST	Art History (BFA)	+	-
3	DANCE	Dance (BFA)	+	-
4	MUS-BA	Music-BA	+	-

Entity Group page

Academic Entity Group

This arbitrary number is unique for each entity group. It can be used as a precondition or condition requirement.

Effective Date

The latest effective date that you entered for the entity group is used during analysis.

Academic Institution

Select the academic institution. Each entity group is associated with only one academic institution. This field is used for prompting, not analysis.

Description

Enter a description for the entity group that you want to establish. The description displays in the requirement group and requirement summaries.

Short Description and Long Description

Enter descriptions for the entity group that you want to establish. The descriptions are for documentation purposes only.

Entity Group Type

Select the entity group type that indicates the type of items that are contained in the group. This field value determines what information appears in the Entity Group Item Detail group box. Values are:

Plan: Indicates that the entity group contains academic plans.

Program: Indicates that the entity group contains academic programs. This is the default field value.

Student Group: Indicates that the entity group contains student groups.

Sub Plan: Indicates that the entity group contains academic sub-plans.

Entity Group Item Detail

Lists the details (entities) in this academic entity group. An entity group item number is a sequential line number that the system automatically assigns to each item in the entity group. The user can override the number.

Description The system automatically supplies the description.

Defining Dynamic Conditions

Access the Condition Line page.

Condition Line page

A condition specification (dynamic condition) is a condition that includes connector types, lines, process types, parameters, and controls. Once you create a condition specification, it may be referenced as a precondition or condition requirement by academic and enrollment requirements, as well as academic and enrollment requirement groups. It may also be referenced by another dynamic condition. Using Boolean logic, dynamic conditions can be combined within a condition specification to create complex expanded conditions. For example, you could create two dynamic conditions, and then point to these from a third dynamic condition. Dynamic condition #1 equals level = freshman and cum GPA $\geq$ 2.0. Dynamic condition #2 equals sophomore and cum GPA $\geq$ 2.5. Dynamic condition #3 equals table entry = dynamic condition #1 OR table entry = dynamic condition #2.

Condition Specification This is an arbitrary number that is unique for each condition specification. You can use this condition specification as a precondition or condition requirement.

Effective Date The latest effective date that you entered for the condition specification is used during analysis.

Description Enter a description for the condition specification that you want to establish. The description appears on the requirement group and requirement summaries.

Short Description and Long Description Enter descriptions for the condition specification that you want to establish. These descriptions are used for documentation purposes only.

Connector Type Select the main connector type for this condition specification. Values include *None*, *AND*, and *OR*. (*None* converts to *AND*.) The connector type indicates the Boolean operator to be used in the equation that contains the condition lines.

Institution	Enter the academic institution. Each condition specification is associated with only one academic institution. This field is used for prompting, not analysis.
Condition Line Sequence	This number indicates the order in which the condition lines are evaluated. The condition line sequence number is automatically assigned, but can be overridden by the user.
Condition Process Type	Select a condition process type. Values are: <i>Standard Condition:</i> Indicates that the condition is one of the delivered, standard conditions. This is the default field value. If you select this field value, three additional fields become available to complete the condition line statement. The first field contains the standard condition code. Select the appropriate field value. Then enter an operator. (Operators include <i>< or =, > or =, Equal, Greater, In, Less, Not Equal, and Not In</i>. The system does not use operators if the standard condition is <i>Table Entry</i>.) Finally, enter the final field value to complete the statement. For example, the condition line might be <i>Academic Plan Equals Art History (MA)</i>. If the condition is <i>Table Entry</i>, then enter a condition specification number. The delivered translate values for the standard condition field are: <i>None:</i> Indicates no field value. <i>Academic Level:</i> Indicates the year of study. For example, valid values include freshman and sophomore. This value is evaluated against the student based on whatever As of Date field value is specified at run time. <i>Academic Plan:</i> Indicates the area of study, for example, a major or minor within the academic program. Some plans are subdivided into sub-plans. <i>Academic Plan</i> and <i>Primary Academic Plan</i> reference the exact same plan when the student has one plan only. <i>Academic Plans:</i> Indicates that all of a student's plans are part of the equation. <i>Academic Program:</i> Indicates the program of study to which a student applies and is admitted. <i>Academic Program</i> and <i>Primary Academic Program</i> reference the exact same program when the student has one program only. <i>Academic Programs:</i> Indicates that all of a student's academic programs are part of the equation. <i>Academic Standing:</i> Indicates a student's standing at the institution. For example, values might include good standing, probation, and dismissal. You define values in the Academic Standing table. This value is evaluated against the student based on the as of date that you specify at run time. <i>Academic Sub-Plan:</i> Indicates a further specialization within the academic plan. <i>Academic Sub-Plans:</i> Indicates that all of a student's sub-plans are part of the equation. <i>Cumulative Grade Point Average:</i> A student's cumulative grade point average (derived from the students term history cumulative statistics, in conjunction with the processing as of date). <i>Primary Academic Plan:</i> Indicates a student's primary academic plan. The primary academic plan is designated by the lowest plan sequence number on the Student Plan page. For example, under a program of LAU, a student might have two plans, Psychology and Classics Minor. If Psychology has a

plan sequence number of 10 and Classics Minor has a plan sequence number of 20, then Psychology is the primary academic plan. On the Student Plan page, student career number 0 is the primary career.

Important! The primary academic plan is designated by the lowest plan sequence number on the Student Plan page, and the primary academic program is designated by the lowest career sequence number on the Student Program page. However, when a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is that plan with the lowest plan sequence number under the program with the lowest student career number. For example, under a program of Liberal Arts Undergraduate (attached to a student career number of 0), a student has a plan of Psychology with a plan sequence number of 10. The same student has a plan of Art with a plan sequence number of 10 under a program of Fine Arts Undergraduate (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan. In this example, the primary plan is Psychology, which is tied to a student career number of 0 through the Liberal Arts Undergraduate program.

Primary Academic Program: Indicates a student's primary academic program. The primary academic program is the program designated by the lowest career sequence number. On the Student Program page, student career number 0 is the primary career.

Student Group: Indicates a grouping of students. For example, values might include athlete and veteran. You define values in the Student Group table.

Student Groups: Indicates that all of the student groups containing a student are part of the equation.

Table Entry: Indicates a dynamic condition that has been previously created in the Define Dynamic Condition component.

User Programmable Condition: Indicates that the condition is a user programmable condition. If you select *User Programmable Condition*, the Condition Process Identifier field becomes available. Enter the appropriate value that is a unique, arbitrary number for the condition process. Values are: 0001 (*Milestone Check*), 0002 (*Internal Degree Check*), and 0003 (*External Degree Check*). *Milestone Check* verifies whether a milestone is completed, in progress, or not completed. (The required status of the milestone is recorded on the Condition Controls page.) *Internal Degree Check* verifies whether a student has received a degree from the home institution. *External Degree Check* verifies whether a student has received a degree from another institution.

Note. You can create additional condition process identifier field values in the Condition Processes table. Delivered field values are numbered from 1 through 500. Client-added values should be numbered above 500.

Example

Condition Specification 000004 has multiple condition lines.

The screenshot displays the 'Condition Line' page with three tabs: 'Condition Line', 'Condition Parameters', and 'Condition Controls'. The 'Condition Line' tab is active, showing a list of conditions. The top condition is expanded, revealing its details.

Condition Specification: 000004

***Effective Date:** 01/01/1900

***Status:** Active

***Description:** Passed Portfolio/Audition

Short Description: Port/Aud

Long Description: Completed either a portfolio or an audition.

Connector Type: OR

***Institution:** PSUNV

Condition Find | View All 1 of 1

***Condition Line Sequence:** 1

***Condition Process Type:** User Programmable Condition

Condition Process Identifier: 0001 Milestone Check

***Condition Line Sequence:** 2

***Condition Process Type:** User Programmable Condition

Condition Process Identifier: 0001 Milestone Check

Using the Condition Line page for multiple conditions

Establishing Condition Parameters

Access the Condition Parameters page.

Condition Parameters page

Condition parameters are only valid if the value for the Condition Process Type field on the Condition Line page is *User Programmable Condition*. If the condition process type is *Standard Condition*, then the Condition Parameters page is not activate.

When the condition process type on the Condition Line page is *User Programmable Condition*, you can establish parameters or filters for the condition lines on the Condition Parameters page.

Condition Specification An arbitrary number that is unique for each condition specification. You can use this condition specification as a pre-condition or condition requirement.

Effective Date Appears by default from the Condition Line page.

Condition Line Sequence Appears by default from the Condition Line page.

Condition Process Identifier Appears by default from the Condition Line page. Values are:

Milestone Check: Verifies whether a milestone is complete, in progress, or incomplete. Record the milestone status on the Condition Controls page.

Important! The *Milestone Check* condition process identifier uses the academic structure as a filter when a milestone is attached to a template. The fields denoting the academic structure (institution, career, program, and plan) are used to narrow the possible values for each milestone. The milestone that you selected on the Condition Controls page must be defined in a milestone template with the same academic structure as that specified on the Condition Parameters page. If a milestone is not attached to a template, define only the academic institution on the Condition Parameters page.

Internal Degree Check: Verifies whether a student has received a degree from the home institution.

External Degree Check: Verifies whether a student has received a degree from another institution. External degrees are recorded within the Education component.

Note. The fields that are available on this page depend on the condition process identifier that you recorded on the Condition Line page.

Condition Line Detail Sequence	Enter the order in which the condition line details are to be evaluated. This number is automatically assigned, but the user can override it.
Academic Institution	If applicable, enter the academic institution. Each condition line detail is associated with only one academic institution.
Academic Career	If applicable, enter the academic career that contains the academic program that is associated with this condition line detail.
Academic Program	If applicable, enter the academic program that is associated with this condition line detail.
Academic Plan	If applicable, enter the academic plan that is associated with this condition line detail.
Degree	Enter the degree that must be obtained to satisfy the condition line.

Specifying Condition Controls

Access the Condition Controls page.

Condition Controls page

Condition controls are only valid if the value of the Condition Process Type field on the Condition Line page is *User Programmable Condition*. If the condition process type is *Standard Condition*, then the Condition Controls page is not activate.

When the condition process type on the Condition Line page is *User Programmable Condition*, you can establish additional controls in the condition lines on the Condition Controls page. You can record milestone information, as well as the required minimum grade points.

Condition Specification	An arbitrary number that is unique for each condition specification. This condition specification can be used as a precondition or condition requirement.
Effective Date	Appears by default from the Condition Line page.
Institution	If applicable, appears by default from the Condition Line page.
Condition Line Sequence	Appears by default from the Condition Line page.
Condition Line Detail Sequence	Appears by default from the Condition Parameters page.

Note. The fields that are available on this page depend on the condition process identifier that you recorded on the Condition Line page.

Milestone	Enter the milestone that must be achieved to satisfy this condition line detail. For example, a milestone could be an audition, qualifying exam, or thesis. You define milestones in the Milestone table.
Milestone Complete	Select the appropriate milestone. Values are: <i>None:</i> Indicates that the field is not applicable. <i>Completed:</i> Indicates that the student must complete this milestone to satisfy the condition line detail. <i>In Progress:</i> Indicates that the student must be working towards completing the milestone to satisfy the condition line detail. <i>Not Completed:</i> Indicates that the student must not have completed this milestone to satisfy the condition line detail.
Milestone Level	Enter the minimum level for this milestone. Some examples of milestone levels are honors, undergraduate, or graduate.
Minimum Grade Points	Enter the minimum grade points that are acceptable to complete this condition line detail.
Milestone Title	Enter a descriptive phrase as the milestone title. This field does not appear on the audit report. Use this field for documentation purposes only.

Defining Custom Conditions

This section provides an overview of custom conditions and discusses how to establish custom condition processes.

Understanding Custom Conditions

A condition table provides a solid structure for condition expansion, including condition processes. You can create custom conditions based on demographic data and existing student record data, as well as criteria such as eligibility to enroll, completion of a specific test, or some unique combination of conditions required for enrollment in a specific course.

Because only certain conditions (like GPA, student group, academic plan, academic program, milestone, and external and internal degree) are delivered with Academic Advisement, you can create additional conditions as needed.

Every institution can create unique conditions to meet specific needs. For example, you might need to establish a minimum age requirement for a wine tasting course by creating a condition based on minimum age and attaching that condition to an enrollment requisite for the wine tasting course. As another example, a custom condition might verify that a student is not only in a program, but eligible to enroll in that program.

Your programmer can write a new Cobol program to set up customized processes using this table. The person who writes the program should be experienced in how PeopleSoft software handles Cobol. Pass parameters entering the custom program using the copybook SRCUCOND. (The bind and select variables in the stored statements must also match, otherwise the program stops running, usually with a remote call error.) The only values that you pass to the custom program are condition status, condition status message, condition code, condition effective date, and condition line sequence number. The custom program should only return the condition truth value, either T or F. Here is the actual Cobol code from SRCUCOND.cbl:

```
02 COND-STATUS      PIC X(01) .
02 COND-STATUS-MESSAGE  PIC X(50) .
02 COND-STATUS-SPEC   PIC X(06) .
02 EFFDT           PIC X(10) .
02 COND-LINE-SEQ     PIC S9(04) .
02 COND-TRUTH-VALUE  PIC X(01) .
88 COND-TRUE  VALUE 'T'
88 COND-FALSE VALUE 'F'
```

If you need any other values, they must be linked to the custom program as an external copybook. Here is the code from the custom program SRPCU001.cbl that shows how the ID was passed into the custom program:

```
01 CADAE  EXTERNAL.  COPY SRCCADAE.
LINKAGE SECTION
01 SQLRT.  COPY PTCSQLRT.
01 CUSR1.  COPY SRCUCOND.
PROCEDURE DIVISION USING  SQLRT
                        CUSR1.
```

Depending on the condition that you want to create, you may want to copy the external array SRCCACDD into the working storage area of the new condition program. If you copy the external array SRCCACDD into the working storage area, it should look like this:

```
01 CACDD  EXTERNAL.  COPY SRCCACDD.
```

Note. The linkage section should look like that of the three demo programs: SRPCUSR1, SRPCUSR2, and SRPCUSR3.

The linkage section and procedure division should look like this:

```
LINKAGE SECTION
01 SQLRT.  COPY PTCSQLRT.
01 CUSR1.  COPY SRCUCOND.
PROCEDURE DIVISION USING  SQLRT,
                        CUSR1.
```

Note. Do not copy external arrays other than SRCCACDD into working storage, because other parameters may be modified in future releases. However, information in array SRCCACDD is to be supported in future releases.

Here's how to create custom conditions:

1. With the assistance of a developer, create a customized process.
2. Create a new condition process identifier using the Condition Processes page.
Enter the effective date, status, descriptions, logical process type, logical name, process key format, and requirement key count (if appropriate) for the condition process identifier.
3. Use this condition process identifier as a user programmable condition on the Condition Line page.
Create condition lines within the condition specification.

Page Used to Establish Custom Conditions

Page Name	Object Name	Navigation	Usage
Condition Processes	CONDITION_PROC_TBL	Academic Advising, Academic Requirements, Define Condition Processes	Establish custom condition processes.

Establishing Custom Condition Processes

Access the Condition Processes page.

The screenshot displays the 'Condition Processes' page. At the top, there is a title bar with 'Find | View All' and a '1 of 1' indicator. Below this, the form contains the following fields and values:

- Condition Process Identifier:** 0001
- *Effective Date:** 01/01/1900
- *Status:** Active
- *Description:** Milestone Check
- Short Description:** Milestone
- *Logical Process Type:** Cobol Process
- *Logical Name:** SRPCUSR1
- *Process Key Format:** TYP2 (with a magnifying glass icon) Milestone Key
- ☐ **Ignore Key Count**
- Required Key Count:** (empty field)

Condition Processes page

To create a custom condition, establish a new condition process identifier that you use to create a new condition specification. Once you create a condition specification, it may be referenced as a precondition or condition requirement by academic and enrollment requirements, as well as academic and enrollment requirement groups.

Condition Process Identifier	An arbitrary number that is unique for each condition process identifier. You can use this condition process identifier as a precondition or condition requirement.
-------------------------------------	---

Note. Three condition process identifiers are delivered with the system. These are 0001 Milestone Check, 0002 Internal Degree Check, and 0003 External Degree Check. Delivered field values are numbered from 1 through 500. Added values should be numbered above 500.

Effective Date	The latest effective date that you entered for the condition process identifier is used during analysis.
Description and Short Description	Enter descriptions for the condition process identifier that you want to establish. None of these values appear on the audit reports. These fields are used for documentation purposes only.
Logical Process Type	Select the process. Currently, the only field value available is <i>Cobol Process</i> .
Logical Name	Enter the logical name of the program that is called for this specific condition process identifier.
Process Key Format	Enter the process key format that controls what fields are available on the Condition Parameters and Condition Controls pages. In addition, this field value also determines which logical name is called. Values include: <i>TYP1 Program Key:</i> Provides the keys (values) needed to run the program. This is the default value. <i>TYP2 Milestone Key:</i> Provides the keys (values) needed to define and validate a milestone. <i>TYP3 Internal Degree:</i> Provides the keys (values) needed to define an internal degree as required. <i>TYP4 External Degree:</i> Provides the keys (values) needed to define an external degree as required.
Ignore Key Count	Select this check box if the number of key values (or rows) on the Condition Parameters page is irrelevant. The Required Key Count field becomes unavailable for edit. Clear this check box to make the Required Key Count field available and specify how many key values must be entered on the Condition Parameters page.
Required Key Count	Enter the number of key values (or rows) that must be entered on the Condition parameters page. If you do not enter a key count value, then no entries are permitted on the Condition Parameters page. For example, suppose that the required key count is 4, then there must be four rows on the corresponding Condition Parameters page.

Example

Use the delivered condition process identifier, *0001* (milestone check), to require a milestone as defined in the Define Dynamic Condition component.

Condition Processes

Find | View All 1 of 1

Condition Process Identifier: 0001 + -

***Effective Date:** 01/01/1900 31

***Status:** Active ▼

***Description:** Milestone Check

Short Description: Milestone

***Logical Process Type:** Cobol Process ▼

***Logical Name:** SRPCUSR1

***Process Key Format:** TYP2 Milestone Key

☐ Ignore Key Count

Required Key Count:

Using the Condition Processes page when a milestone check has been defined in the Define Dynamic Condition component

Use this condition process identifier as a user programmable condition on the Condition Line page.

Find | View All 1 of 1

Condition Specification: 000004 + -

***Effective Date:** 01/01/1900 31 ***Status:** Active ▼

***Description:** Passed Portfolio/Audition **Short Description:** Port/Aud

Long Description: Completed either a portfolio or an audition. ▼

Connector Type: OR ▼ ***Institution:** PSUNV ▼

Find | View All 1 of 3

***Condition Line Sequence:** 1 + -

***Condition Process Type:** User Programmable Condition ▼

Condition Process Identifier: 0001 Milestone Check

Using the Condition Line page to reference a condition specification

You can reference the condition specification 004 (containing condition process identifier 0001).

Using the Condition Parameters page to compare the number of rows versus the key count of the referenced condition process

The number of rows on this page must match the key count of the condition process that you referenced, if a key count is required.

Reviewing specific condition data on the Condition Controls page

You can enter specific condition data that references each row (or key).

CHAPTER 11

Maintaining Academic Advisement Setup Data

This chapter lists prerequisites and discusses how to:

- Produce an Advisement Group Summary report.
- Produce a Database Tables report.
- Produce Entity Group Table and Condition Table reports.
- Produce a Requirement Advisement report.
- Produce a Reverse Engineering report.

Prerequisite

Before you produce setup data reports, you must set up academic advisement data in your system.

See Also

[Chapter 4, “Setting Up Academic Course Lists,” page 21](#)

[Chapter 5, “Setting Up Academic Requirements,” page 31](#)

[Chapter 6, “Setting Up Academic Requirement Groups,” page 79](#)

[Chapter 10, “Creating and Using Expanded Conditions and Custom Conditions,” page 131](#)

Producing an Advisement Group Summary Report

This section provides an overview of the Advisement Group Summary report and discusses how to generate the report.

Understanding the Advisement Group Summary Report

The advisement group summary report lists the contents (or structure) of a specific academic requirement group or all of the academic requirement groups that meet the criteria established for the report. This report is an easy way to verify the academic requirement groups for any academic program or plan. For example, suppose that you need a printout of all the academic requirement groups that are defined for an undergraduate psychology major, you can run this report.

While preparing to print this report, you can request that the requirements, lines, and courses be summarized in generalized terms or in specific detail. The parameters that you define for the requirement advisement report appear on the report.

Here's how to create an Advisement Group Summary report:

1. Select the academic requirement group or enter other general parameters on the Advisement Group Summary Report page.

Enter the description and detail options available through the Print Options link.

2. Click the Run button to process the report.

Pages Used to Produce an Advisement Group Summary Report

Page Name	Object Name	Navigation	Usage
Advisement Group Summary	RUNCTL_SRGRPADV	Academic Advising, Advising Reports, Academic Requirement Group	Request a report detailing all of the requirements contained in a specific requirement group or all of the requirement groups that meet the criteria that you established on this page.
Print Options	PRINT_OPTIONS_SEC	Click the Print Options link on the Advisement Group Summary page.	Select summary report preferences.

Generating an Advisement Group Summary Report

Access the Advisement Group Summary page.

Advisement Group Summary

Run Control ID: PSDF [Report Manager](#) [Process Monitor](#) [Run](#)

*As of Date: 07/20/2004 Requirement Group:

Academic Institution: PeopleSoft University

Academic Career: Undergraduate

Academic Program: Liberal Arts Undergraduate

Academic Plan: Psychology

Academic Sub-Plan:

Requirement Usage:

Honor Blank Values: ☐

[Print Options](#)

Advisement Group Summary page

The advisement group summary report lists the contents (or structure) of a specific requirement group or all of the requirement groups that meet the criteria established for the report. This report is an easy way to verify the requirement groups for any academic program or plan. For example, you need a printout of all the requirement groups that are defined for an undergraduate psychology major, you can run this report.

While preparing to print this report, you can request that the groups, requirements, lines, and courses be summarized in generalized terms or in specific detail. The parameters that you define for the summary report appear on the report.

Run Control ID	Identifies the report request. You can use any alphanumeric combination.
As of Date	The advisement group summary report accurately reflects the requirements that are contained in the specified requirement group (or requirement groups that meet the search criteria) as of this date. (The current date appears by default, but you can modify it.) A value in this field is required.
Requirement Group	Enter the requirement group number that is the subject of this report. Each requirement group consists of detail lines pointing to conditions, courses, and requirements as well as parameters that include unit and course requirements. If you enter a requirement group number, then the remaining fields on the page become unnecessary and are eliminated from the page. The institution, career, program, plan, sub-plan, and requirement usage are automatically contained within the specified requirement group. If you do not enter a requirement group number, these fields remain on the page and are used to identify the requirement groups that satisfy the search criteria.
Academic Institution	Select the academic institution. Each requirement group is associated with one academic institution only. A value in this field is required. Important! The Academic Career, Academic Program, Academic Plan, and Academic Sub-Plan fields on this page are used for analysis purposes. These fields are not just prompt values. Because fields are analyzed in a hierarchical order, appropriate field values are system-supplied. For example, suppose that you enter an academic program, the appropriate Academic Career field value is automatically supplied by the system. If any of these fields are left blank, the report will contain <i>all</i> careers, programs, plans, and sub-plans that satisfy the search criteria.
Academic Career	Enter the academic career that is affected by the requirement groups.
Academic Program	Enter the academic program that is contained within the academic career.
Academic Plan	Enter the academic plan that is an area of study (for example, major or minor) within the academic program.
Academic Sub-Plan	Enter the academic subplan that is a further specialization within the academic plan.
Requirement Usage	Indicates how the system uses the requirement groups in the academic advisement process. Values include: <i>None:</i> Indicates that the field is not used as a limiting parameter. This value appears by default. <i>Academic Advisement:</i> Indicates that requirement groups with a usage of academic advisement are included in the report. <i>Student Individualized Plan:</i> Indicates that requirement groups with a usage of student individual individualized plan are included in the report.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Honor Blank Values

Select this check box if blank fields on this page represent actual values. This check box is clear by default. For example, suppose that the check box is selected and the Academic Program field is left blank, then the report will not contain requirement groups with an academic program because no program has been specified. If the check box is clear, the blank field acts as a wildcard and every requirement group with an academic program in the specified career is included in the report.

Note. The Honor Blank Values check box does not affect the Requirement Usage field.

Print Options

Click this link to access the print options.

Defining Advisement Group Summary Print Options

Access the Advisement Group Summary - Print Options page.

Advisement Group Summary
Print Options

Description Options

Print Course Level: Standard ▼

Print Group Level: Standard ▼

Print Line Level: Standard ▼

Print Requirement Level: Standard ▼

Detail Options

☐ Print Group Level

☐ Print Line Level

☐ Print Requirement Level

Course List Detail Level: List and Courses ▼

[Return](#)

Advisement Group Summary - Print Options page

Description Options

Enables you to control how descriptions are presented in the summary report.

Print Course Level

Select the print course level that governs the type of course description that is included in the report. Values include:

None: Indicates that a description does not print on the report.

All: Indicates that the standard, short, and long descriptions on the Course List Description page print on the report.

Long: Indicates that the long description on the Course List Description page prints on the report.

Standard: Indicates that the description on the Course List Description page prints on the report. This value appears by default.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Print Group Level

Select the print group level that governs the type of requirement group description that is included in the report. Values include:

None: Indicates that a description does not print on the report.

All: Indicates that the standard, short, and long descriptions on the Requirement Group page, plus the catalog description print on the report.

Catalog: Indicates that the description on the Requirement Group page prints on the report.

Excp Cat: Indicates that the standard, short, and long descriptions on the Requirement Group page print on the report.

Long: Indicates that the long description on the Requirement Group page prints on the report.

Standard: Indicates that the description on the Requirement Group page prints on the report. This value appears by default.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Print Line Level

Select the print line level that governs the type of line description that is included in the report. Values include:

None: Indicates that a description does not print on the report.

All: Indicates that the standard, short, and long descriptions on the Requirement Line Item page print on the report.

Long: Indicates that the long description on the Requirement Line Item page prints on the report.

Standard: Indicates that the description on the Requirement Line Item page prints on the report. This value appears by default.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Print Requirement Level

Select the print requirement level that governs the type of requirement description that is included in the report. Values include:

None: Indicates that a description does not print on the report.

All: Indicates that the standard, short, and long descriptions on the Requirement page print on the report.

Long: Indicates that the long description on the Requirement page prints on the report.

Standard: Indicates that the description on the Requirement page prints on the report. This value appears by default.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Detail Options

Enables you to control how details are presented in the summary report.

Print Group Level	Select this check box to print the requirement group detail on the report. If the check box is clear, no group detail prints.
Print Line Level	Select this check box to print the line detail on the report. If the check box is clear, no line detail prints.
Print Requirement Level	Select this check box to print the requirement detail on the report. If the check box is clear, no requirement detail prints.
Course List Detail Level	Select how the course list detail should appear in the report. Values include: <i>None:</i> Converts to <i>List and Courses</i>. <i>List and Courses:</i> Indicates that the course list, plus specific courses print on the report. This value appears by default. <i>List and Courses with Detail:</i> Indicates that the course list, plus specific courses with detail print on the report. <i>List Only:</i> Indicates that only the course list prints on the report. <i>List Only with Detail:</i> Indicates that the course list with detail prints on the report. Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Producing a Database Tables Report

Create a Database Table report to retrieve all of the data stored in each academic advisement table for a specific student on a specific date.

Here's how to create a Database Tables report:

1. Specify the as of date, ID, and report type on the Database Tables Report page.
Leave the ID and Report Type fields blank for the system to return all of the values (wild card).
2. Click the Run button to process the report.

This section lists prerequisites and discusses how to enter database table information.

Prerequisite

Before you can run the Database Tables report, you must first populate the database tables by running a transcript with the report format of analysis database for the student or group of students in whom you are interested.

Page Used to Produce a Database Tables Report

Page Name	Object Name	Navigation	Usage
Database Tables Report	RUNCTL_SRDBTBLS	Academic Advising, Advising Reports, Database Tables	Retrieve all of the data stored in each academic advisement table for a specific student on a specific date. Before creating a modified report, you can run this report to view the data that is available for the student. On any specific day, you can run one standard and one special report for the same student.

Entering Database Table Information

Access the Database Tables Report page.

Database Tables Report

Run Control ID: PSDF [Report Manager](#) [Process Monitor](#)

*As of Date: 

ID: 

Report Type: 

Database Tables Report page

As of Date

The database tables report accurately reflects the contents of each academic advisement table for the designated student as of this date. This field value automatically populates to the current date, but you can modify it. A value in this field is required.

ID

Enter the student's ID number.

Report Type

Values include:

SPC (special): Indicates a special advising report using a special requirement usage.

STD (standard): Indicates a standard advising report.

Producing Entity Group Table and Condition Table Reports

Entity groups are like items (programs, plans, subplans, or student groups) that you bundle together and use in a degree requirement. For example, you may create a degree requirement that asks that all undergraduate students to take a physical education course except (the entity of) athletes and students in ROTC. Such entities appear in the report. Dynamic conditions work similarly. They are conditions that you define and use in a degree requirement. For example, you might have a degree requirement that asks art majors to submit an art portfolio. In this example, the portfolio is a condition for graduating. The condition then appears on the Condition Table report.

Create the Entity Group Table report or the Condition Table report to review the various condition data set up for a specific institution, as of a particular date.

Here's how to produce an Entity Group Table or Condition Table report:

1. Select the as of date and institution on the Entity Group Table and Condition Table Reports page for which you want to report conditions.
2. Click the Run button.
3. Select either the Condition Table Report or the Entity Group Table Report process to specify the report type.
4. Click the OK button to process the report.

Pages Used to Produce Entity Group Table and Condition Table Reports

Page Name	Object Name	Navigation	Usage
Entity Group Table and Condition Table Reports	RUNCTL_SRMISRPT	Academic Advising, Advising Reports, Miscellaneous Reports	Process one of two academic advisement administrative reports: the Entity Group Table report and the Condition Table report. The Entity Group Table report lists all of the entity groups for the institution based on the as of date that you enter. The Condition Table report lists all of the dynamic conditions for the institution based on the as of date that you enter.

Entering Entity Group and Condition Report Parameters

Access the Entity Group Table and Condition Table reports page.

Run Control ID Identifies the report request. You can use any alphanumeric combination.

As of Date The report accurately reflects the retrieved information as of this date. This field value automatically populates to the current date, but you can modify it. A value in this field is required.

Institution

The institution for which you want to report.

Producing a Requirement Advisement Report

The Requirement Advisement report lists the contents (or structure) of a specific academic requirement or all of the academic requirements that meet the criteria established for the report. This report is an easy way to verify the academic requirements for any academic program or plan. For example, if you need a printout of all of the academic requirements that are defined for an undergraduate psychology major, you can run this report.

While preparing to print this report, you can request that the requirements, lines, and courses be summarized in generalized terms or in specific detail. The parameters that you define for the requirement advisement report appear on the report.

Here's how to create a Requirement Advisement report:

1. Select the academic requirement or enter other general parameters on the Requirement Advisement Report page.

In addition, enter the description and detail options available through the Print Options link.

2. Click the Run button to process the report.

Pages Used to Create a Requirement Advisement Report

Page Name	Object Name	Navigation	Usage
Requirement Advisement Report	RUNCTL_SRRQRADV	Academic Advising, Advising Reports, Academic Requirement	Process a report detailing a specific requirement or all of the requirements that meet the criteria that you established on this page.
Print Options	PRINT_OPTIONS_SEC2	Click the Print Options link on the Requirement Advisement Report page.	Select report preferences.

Defining the Requirement Advisement Report Parameters

Access the Requirement Advisement Report page.

Requirement Advisement Report

Run Control ID: PSDF [Report Manager](#) [Process Monitor](#) Run

***As of Date:** 

Academic Requirement: 

Academic Institution:  PeopleSoft University

Academic Career: 

Academic Program: 

Academic Plan: 

Academic Sub-Plan: 

☐ **Honor Blank Values**

[Print Options](#)

Requirement Advisement Report page

Run Control ID	Identifies the report request. You can use any alphanumeric combination.
As of Date	The requirement advisement report accurately reflects the specific requirement (or requirements that meet the search criteria) as of this date. The current date appears by default, but you can modify it. A value in this field is required.
Academic Requirement	Enter the academic requirement that is the subject of this report. Each requirement consists of detail lines pointing to conditions and courses, as well as parameters that include unit and course requirements.
Academic Institution	Each requirement is associated with only one academic institution. A value in this field is required.

Important! The Academic Career, Academic Program, Academic Plan, and Academic Sub-Plan fields on this page are used for analysis purposes. These fields are not just prompt values. Because fields are analyzed in a hierarchical order, appropriate field values are system-supplied. For example, suppose that you enter an academic program, the appropriate academic career field value is automatically supplied by the system. If any of these fields are left blank, the report will contain *all* careers, programs, plans, and sub-plans that satisfy the search criteria.

Academic Career	Enter the academic career that is affected by the requirements.
Academic Program	Enter the academic program that is contained within the academic career.
Academic Plan	Enter the academic plan that is an area of study (for example, major or minor) within the academic program.

Academic Sub-Plan	Enter the academic sub-plan that is a further specialization within the academic plan. A value in this field is optional.
Honor Blank Values	Select this check box if blank fields on this page represent actual values. The default is clear. For example, if you select the check box and leave the Academic Program field blank, then the report will not contain an academic program, because no program has been specified. If the check box is clear, the blank field acts as a wildcard and every academic program in the specified career will be included in the report.
Print Options	Click this link to access the print options.

Defining Requirement Advisement Print Options

Access the Requirement Advisement Report - Print Options page.

Requirement Advisement Report
Print Options

Description Options

Print Course Level: Standard ▼
 Print Line Level: Standard ▼
 Print Requirement Level: Standard ▼

Detail Options

☐ Print Line Level
☐ Print Requirement Level
 Course List Detail Level: List and Courses ▼

Requirement Advisement Report - Print Options page

Description Options

This page enables you to control how you present descriptions in the report.

Print Course Level	Governs the type of course description that is included in the report. Values include: <i>None:</i> Indicates that a description does not print on the report. <i>All:</i> Indicates that the standard, short, and long descriptions on the Course List Description page printed on the report. <i>Long:</i> Indicates that the long description on the Course List Description page prints on the report. <i>Standard:</i> Indicates that the description on the Course List Description page prints on the report. This value appears by default. Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.
---------------------------	---

Print Line Level

Defines the type of line description that is included in the report. Values include:

None: Indicates that a description does not printed on the report.

All: Indicates that the standard, short, and long descriptions on the Requirement Line Item page print on the report.

Long: Indicates that the long description on the Requirement Line Item page prints on the report.

Standard: Indicates that the description on the Requirement Line Item page prints on the report. This value appears by default.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Print Requirement Level

Defines the type of requirement description that is included in the report. Values include:

None: Indicates that a description does not print on the report.

All: Indicates that the standard, short, and long descriptions on the Requirement page print on the report.

Long: Indicates that the long description on the Requirement page prints on the report.

Standard: Indicates that the description on the Requirement page prints on the report. This value appears by default.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Detail Options

Enables you to control how details are presented in the summary report.

Print Line Detail

Select this check box to print the line detail on the report. If the check box is clear, no line detail prints.

Print Requirement Detail

Select this check box to print the requirement detail on the report. If the check box is clear, no requirement detail prints.

Course List Detail Level

Enter the value that indicates how the course list detail appears in the report. Values include:

None: Converts to *List and Courses*.

List and Courses: Indicates that the course list plus specific courses print on the report. This value appears by default.

List and Courses with Detail: Indicates that the course list plus specific courses with detail print on the report.

List Only: Indicates that the course list prints on the report only.

List Only with Detail: Indicates that the course list with detail prints on the report.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Producing a Reverse Engineering Report

Use the Reverse Engineering Report page to search for a requirement, course, course list, or condition that the system is using. You can search to find out which requirement group contains a specific requirement; which course list contains a specific course; which requirement contains a specific course list; and which requirement group, requirement, or requirement line contains a specific condition.

The reverse engineering reports include enrollment and academic advisement requirement groups, requirements, and course lists.

Here's how to produce a Reverse Engineering report:

1. Select the report type and any other general parameters on the Reverse Engineering Report page.
2. Click the Run button to process report.

Pages Used to Produce a Reverse Engineering Report

Page Name	Object Name	Navigation	Usage
Reverse Engineering Report	RUNCTL_SRREVENG	Academic Advising, Advising Reports, Reverse Engineering	Enter the parameters that are to capture the data that you want to review. Select a report type to enable the page to display the appropriate parameter fields.

Entering Reverse Engineering Report Parameters

Access the Reverse Engineering Report page.

Reverse Engineering Report

Run Control ID: PSDF

[Report Manager](#)
[Process Monitor](#)

Run

***As of Date:**

***Report Type:**

Course ID:

Subject Area:

Catalog Nbr:

Academic Group:

Select Course:

Search

Reverse Engineering Report page

Run Control ID Identifies the report request. You can use any alphanumeric combination.

As of Date The reverse engineering report accurately reflects the requirements, courses, course lists, or conditions as of this date. The current date appears by default, but you can modify it. A value in this field is required.

Report Type Enter the report type that indicates the subject of the search. Values include:

Courses in Course Lists: Indicates that a course is the subject of the search. This value appears by default.

Conditions in RG, RQ, RQLN: Indicates that a condition (or conditions) in a requirement group, requirement, or requirement line is the subject of the search.

Course Lists in Requirements: Indicates that a course list is the subject of the search.

Requirements in REQ Groups: Indicates that a requirement is the subject of the search.

Note. Depending on the value in the Report Type field, additional fields are available on this page.

Report Type of Courses in Course Lists

If the report type is *Courses in Course Lists*, the subject of the search is a course.

Course ID, Subject Area, and Catalog Nbr (number) Enter the course ID, subject area, or catalog number plus for the course that are the basis of this search. Combinations of field values must make logical sense.

Important! Even if all of the field values are known in advance, you must click the Search button to run a report successfully.

Search	Click to retrieve available courses. If you click this button without entering a course ID, the system retrieves courses from all of the valid institutions. If your database contains more than one institution that uses similar subject areas and catalog numbers, be sure and select the appropriate course by course ID rather than catalog number.
Select Class	Click the Select Class button next to the course that you want to select. The course now appears on the Reverse Engineering Report page. The Academic Group field value appears.
Report Type of Conditions in RG, RQ, RQLN	
If the report type is <i>Conditions in RG, RQ, RQLN</i> , the subject of the search is a condition (or conditions) in a requirement group, requirement, or requirement line.	
Condition Code	Enter the condition code that indicates which field in the database is subject to this condition. For example, <i>Academic Level</i>, <i>Academic Plan</i>, <i>Academic Program</i>, and <i>Academic Sub-Plan</i> are condition codes. <i>Academic Plan</i> and <i>Primary Academic Plan</i> reference the exact same plan when the student has one plan only. <i>Academic Program</i> and <i>Primary Academic Program</i>: Reference the exact same program when the student has only one program. <i>Academic Plans</i> and <i>Academic Programs</i>: Indicate that all of a student's plans and programs are part of the equation. <i>Academic Sub-Plans</i>: Indicates that all of a student's sub-plans are part of the equation. <i>Student Groups</i>: Indicates that all of the student groups containing a student are part of the equation. <i>Table Entry</i>: Is a condition code that enables you to select one of the dynamic conditions that has been previously created in the Define Dynamic Condition component. Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort. Note. If the condition code is <i>Table Entry</i>, then only the Condition Data field is available.
Condition Operator	Identifies what type of comparison is to be applied to the condition data. Possible condition operators include: <i>Equal</i> , <i>None</i> , <i>< or =</i> , <i>> or =</i> , <i>Greater</i> , <i>In</i> , <i>Less</i> , <i>Not Equal</i> , and <i>Not In</i> . Make sure that you use an operator that makes sense in the equation. Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.
Ignore Condition Operator	Select this check box if the Condition Operator field should be ignored when you run the report. The default is clear. For example, suppose that you select the check box, then the Condition Operator field becomes unavailable and all of the combinations of the specified condition code and condition data are

reported. If the check box is clear, then the condition operator defines the relationship between the specified condition code and condition data.

Condition Data

Select the condition data that specifies the value that is subject to this condition code. For example, specific academic plans and programs, as well as dynamic conditions are condition data values. If the condition code is *Table Entry*, then select a previously created dynamic condition from the prompt box.

Report Type of Course Lists in Requirements

If the report type is *Course Lists in Requirements*, the subject of the search is a course list.

Enter the course list number that is the basis for this report.

Report Type of Requirements in REQ Groups

If the report type is *Requirements in REQ Groups*, the subject of the search is a requirement.

Enter the requirement that is the basis for this report.

CHAPTER 12

Processing Academic Advisement Reports

This chapter provides an overview of online and batch advisement reports, lists prerequisites, and discusses how to:

- Produce an online academic advisement transcript report.
- Produce batch academic advisement transcript reports.
- Produce quick what-if and stored what-if advisement reports.
- Process self-service advisement reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Understanding Online and Batch Advisement Reports

The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the Academic Advisement application. The report indicates whether the student has completed all of the requirements that the student needs to graduate or whether the student still needs to satisfy outstanding requirements.

The advisement report is a type of transcript. You can produce a report that includes or excludes the student's academic history (academic transcript). In this PeopleBook, a academic advisement transcript report refers to a report that includes the academic transcript as well as the degree audit information. The transcript type that you specify at run time determines which format the system uses (advisement or transcript).

Important! In this PeopleBook, a academic advisement report (or advisement report) or academic advisement transcript report is also referred to as a degree progress report or degree audit report. As stated earlier, a academic advisement transcript report typically refers to a report that includes the academic transcript as well as the degree audit information.

The core function of Academic Advisement is the ability to generate an advisement report for a student, several students, or a group (batch) of students. You use different components depending on how many reports you want to produce. You can also store data in the analysis database.

After you run the report process, you can view the results online and print the results.

Note. During the analysis process, the advisement engine does not recognize courses that you entered into the system using the Historical Course Enrollment page. Any historical courses that you entered into a student's record are used for record and history tracking purposes only.

Prerequisites

Before you can process advisement reports, you must set up advisement transcript types on the Basic Data page.

Note. On the Basic Data page where you define transcript types, select the Advising Report check box to designate the transcript type as an academic advisement transcript type, unless you are running a special usage report. Only academic advisement transcript types result in academic advisement transcript reports.

Before students can run self-service advisement reports, designate at least one transcript type for self-service, by selecting the Allow Student Self-Service check box on the Basic Data page.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Setting Up Transcripts," Defining Transcript Types

Producing an Online Academic Advisement Transcript Report

This section discusses how to:

- Select the transcript type and general parameters.
- Select student and what-if data for processing.
- Specify send to information.
- View and print advisement report results.
- Check for report errors.

Pages Used to Create an Online Academic Advisement Report

Page Name	Object Name	Navigation	Usage
Request Header	SA_REQUEST_HEADER	- Academic Advising, Student Advisement, Student Advisement Report - Records and Registration, Transcripts, Transcript Request	Select the type of transcript and set other general parameters of the report request.
Request Detail	SA_REQUEST_DETAIL	Academic Advising, Student Advisement, Student Advisement Report, Request Detail	Select a student ID and, as necessary, what-if options.
Send To Information	SA_REQUEST_DTL_SEC	Click the Send button on the Request Detail page.	Specify the recipient to whom you want to mail the advisement report.
Report Results	SA_REPORT_RESULTS	- Academic Advising, Student Advisement, Student Advisement Report, Report Results - Records and Registration, Transcripts, Transcript Request, Report Results	View the results of your transcript request process. Depending on the transcript type, you may see a transcript only, a transcript and an audit report, or simply an audit report.
Report Errors	SA_REQ_REPORT_ERR	- Academic Advising, Student Advisement, Student Advisement Report, Report Errors - Records and Registration, Transcripts, Transcript Request, Report Errors	View any reporting errors. If the Report Results page is blank or incomplete after you click the Process Request button on the Request Detail page or the word <i>Errors</i> , rather than <i>Successful</i> , appears next to the Print button, check this page. All of the report errors are described in detail in the Message Text field.

Selecting the Transcript Type and General Parameters

Access the Request Header page.

Request Header	Request Detail	Report Results	Report Errors
Report Request Nbr: 000000979 Request Date: 09/13/2004 User ID: PS			
*Institution: PSUNV PeopleSoft University			
*Transcript Type: ADV Academic Advisement Report			
☐ Freeze Record			
☐ Override Service Indicator			
*Output Destination: Printer			
Number of Copies: 1			
Future Release: Immediate Processing			
Academic Career:			
Term:			
Print Date: 09/13/2004			
Request Reason:			
☐ Cancel Request			
*Report Format			
Standard Report Format + -			

Request Header page

Report Request Number	Identifies this report request.
Request Date and User ID	Displays system-supplied values. The request date reflects the date that the report was requested. The user ID identifies the person who requested the report.
Institution	Select the institution to which both the transcript type data and the students that you process are associated.
Transcript Type	Select the type of transcript (for example, advising) that you want to process. You created transcript types using the Transcript Type component. Degree audit information displays only on transcript types for which you selected the Advising Report check box on the Basic Data page. You can use a special usage value as an academic advisement transcript type. See Chapter 3, "Setting Up Optional Advisement Data," Setting Up Special Requirement Usage Values, page 16.

Note. Any modified usage value can be associated with a transcript type and then entered in the Transcript Type field. Modified usage values are established on the Requirement Usage page and attached to a transcript type on the Basic Data page. These values are effective-dated and match the student's requirement term.

Freeze Record

Select to prevent this request from being purged when during a subsequent transcript purge process.

Override Service Indicator

Select to have the system ignore student-specific service indicators when you process the request. If the check box is not selected, then service indicators are evaluated.

For instance, some service indicators prevent a student from receiving a transcript.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, "Managing Service Indicators".

Output Destination

Select the output destination of the transcript. This determines where the system electronically sends the results of the process. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. Values include:

Page: Sends the transcripts to the Report Results page to be viewed online before printing. You can then click the Print button to initialize Crystal, viewing and printing transcripts through a new window.

Printer: Like the *Page* option, sends the transcripts to the Report Results page to be viewed online before printing. You can then click the Print button to initialize Crystal, viewing and printing transcripts through a new window.

Values for this field are delivered with your system as translate values. Do not modify these values. Any modifications to these values require a substantial programming effort.

Number of Copies

Enter the number of copies that you require. When the output destination is *Printer*, the default value of 1 also serves as the default value on the Request Detail page. On the Request Detail page, you can override this value on a student-by-student basis.

Note. The Number of Copies and Print Date fields are available only if the Output Destination field value is *Printer*.

Future Release

Select the future release value that triggers when the system processes the transcript request through a batch (background) generation process. Values are:

Immediate Processing: Indicates that there is no specific future release transcript request.

Degree Confer Date: Indicates that when the degree is conferred, a transcript or degree audit is produced. The Career and Term fields become available for entry.

Grades Post: Indicates that when a fully graded date is reached, a transcript or degree audit is produced. The Career and Term fields become available for entry.

Specific Date: Indicates that a transcript request is produced on the user-specified date.

Hold: Indicates that the production of a transcript or degree audit is on hold. A report is not produced until you click the Process Request button on the Request Detail page.

For example, this field value could be used if transfer work is due to be received for a student. An advisor could set up the parameters for a transcript or degree audit report and wait until all of the work has been posted before running the report.)

Transfer Credit Post: Indicates that a transcript request is produced when transfer credit is posted.

Academic Career

The academic career in which the future release is valid. The field is available when you enter a future release value of *Degree Confer Date* or *Grades Post*.

Term

Enter the term in which the future release is valid. The field is available when you enter a future release value of *Degree Confer Date* or *Grades Post*.

Print Date

The current date appears by default as the print date. You can modify this value, as necessary. The field is unavailable if you enter a future release value of *Immediate Processing*, *Degree Confer Date*, or *Grades Post*.

Request Reason

Select the request reason code for this request. Values for this field are delivered with your system as translate values. You can modify these translate values. Values include *None*, *Data Change*, *End of Term Print*, *External Request*, *Graduation*, *Student's Request*, and *Web Transcript Request*.

Cancel Request

Select to cancel the print request.

Report Format

Indicates the format of the report. For this field to be available, the Advising Report check box on the Basic Data page must be selected and the transcript type must be an advisement report type or a special usage report type. Values include:

Standard Report Format (Default): Indicates that the report is printed as hardcopy or delivered to a page. The analysis database does not refresh when the Report Format field value is *Standard Report Format*.

Analysis Database: Indicates that the report is written to the analysis database. The report is stored in computer-readable format; therefore, application programs can be written against the tables to create modified reports. This is the only field value that refreshes the database tables.

Completed Only: Indicates that the report contains only those requirements that have been wholly completed. Normally, the degree audit report bolds incomplete requirement groups and requirements while completed requirement groups and requirements are not bold.

Incompleted Only: Indicates that the report contains only those requirements that have not been totally completed. This field value can help a counselor determine exactly what requirements a student needs to satisfy to graduate.

Note. Select *Analysis Database* in the Report Format field to write the degree audit report to the analysis database for future use by other Crystal and SQR reports or COBOL programs. Data stored in these academic advisement analysis tables can be reused. The tables can be queried for data.

These tables do not automatically purge and must be updated to remain current.

Note. Use multiple report format rows to both print and write a report to the analysis database.

See [Chapter 13, “Using the Analysis Database to Create User Configurable Reports,” Understanding the Analysis Database, page 185.](#)

Selecting Student and What-If Data for Processing

Access the Request Detail page.

The screenshot shows the 'Request Detail' page. At the top, there are four tabs: 'Request Header', 'Request Detail' (which is active), 'Report Results', and 'Report Errors'. Below the tabs, the page displays report information: 'Report Request Nbr: 000000979', 'Transcript Type: ADV', and 'Completed'. To the right of this information are three buttons: 'Process Request', 'Print', and a 'Report Manager' link. Below this is a table with columns: '*Seq Nbr', '*ID', 'As of Date', and 'Number of Copies'. The table contains one row for 'Kimberly Adams' with values: 1, AA0001, 01/01/3000, and 1. Below the table is a 'What-If Analysis' section. It contains a checkbox labeled 'Enable Stored What-If' and two links: 'Quick What-If' and 'Course List What-If'.

Request Detail page

Use this page to enter student and what-if data.

Important! To define what-if analysis data, you must be in Add mode. If the page is in the Update/Display mode, you can view an existing report, but you can not update or change the report. Each report is dated, so there is no reason to update a report when you can run the report again using today's date as the request date on the Request Header page.

Note. To improve degree audit run times, limit the number of individual reports (request detail records) for online display to 10 per transcript request header. You must retrieve all of the detail report lines for a transcript request header, and if you have a large amount of individual requests, the system attempts to load all of the data.

Note. You do not have to use a what-if scenario to run a report. In fact, a what-if scenario may not be used often.

Under what-if analysis, these what-if functions are available: Stored What-If, Quick What-If, and Course List What-I f.

Seq Nbr (sequence number)	Displays a sequence number. This is a sequential number that is system-supplied. This number determines the order in which the individual report requests are processed. The user can override the number, if necessary.
ID	Enter the ID of the student for whom the report is to be run.
As of Date	The audit report accurately reflects all of the relevant student data as of this date. The date 01/01/3000 appears by default, but you can modify it at each run time. To set the field default to the current date, leave the Transcript Default As of Date field blank on the Installation Student Administration page. A value in this field is required. This field is used to include or exclude future-dated programs, plans, sub-plans, conditions, and entity groups when you run an academic advisement transcript report. When you run the audit report, all of the student data, except course work, as of the As of Date field value is included in the audit. Regardless of the value in the As of Date field, all of the courses on a student's transcript are to be used.
Enable Stored What-If and Stored What-If	Select to enable the Stored What-If option. Click the Stored What-If link to create a new stored what-if scenario or run the degree audit report based on previously stored what-if information for the student. Use the Enable Stored What-If check box to enable and disable the Stored What-If option. The Quick What-If option becomes unavailable and the Stored What-If option becomes available when you select the Enable Stored What-If check box.
Quick What-If	To enable this option, do not select the Enable Stored What-If check box. Click to run a simulated academic advisement report that compares the student's transcript against a proposed academic career, program, plan, and sub-plan that you input using the Quick What-If Analysis Report page.
Course List What-If	To enable this option, do not select the Enable Stored What-If check box. Click to select an existing course from the course catalog to use during a what-if analysis.

Important! The Course List What-If option can be used in combination with the Stored What-If option or the Quick What-If option. You cannot use the Stored What-If option and the Quick What-If option at the same time. These combinations are possible: Course List What-If option alone, Course List What-If option and Stored What-If option, Course List What-If option and Quick What-If option, Stored What-If option alone, and Quick What-If option alone.

Send	If the report is to be sent to a recipient, click to access the Send To Information page and enter the recipient information.
-------------	---

See Also

[Chapter 12, "Processing Academic Advisement Reports," Understanding What-If Advisement Reports, page 175](#)

Specifying Send To Information

Access the Send To Information page.

Specify External Org ID (specify external organization ID)

Select to send the transcript to an external organization that is already in your database. Enter the appropriate organization number and location. If you do not select this check box, enter the address of the requester.

OK

Click to exit the page and return to the Request Detail page.

Process Request and Output Destination

Click the Process Request button on the Request Detail page when you are ready to submit the requests for processing. The system sends the degree audit report to the specified output destination on the Request Header page.

Print

Click to print all of the reports listed on the page. Use the Report Manager to view the Crystal report. When multiple sequence number rows are present, all of the listed reports print.

Viewing and Printing Advisement Report Results

Access the Report Results page.

Request Header Request Detail **Report Results** Report Errors

Find | View All 1 of 2

Seq Nbr: 1 [Print](#)

ID: AA0001 Kimberly Adams [Report Manager](#)

Undergraduate Academic Advisement Report

PeopleSoft University

Name : Adams, Kimberly

Student ID: AA0001

Print Date : 2001-03-14

Requested By : Carroll, Bruce

Report Results page (1 of 3)

- - - - A C A D E M I C A D V I S E M E N T R E P O R T - - - -

Report on Undergraduate Career

Requirements Not Satisfied

Liberal Arts Undergraduate Program

Requirements Not Satisfied

Warning! Student Not Eligible for regulation play!

Requirement Not Satisfied -

Wild Card Test

Wild Card test

Report Results page (2 of 3)

wild card test						
Term	Course		Description	Units	Grade	Code
1997 Fall	BIOLOGY	100	General Biology I	3.50	C	EN
Test Condition						
Requirement Not Satisfied -						
Condition Name					Status	
Passed Portfolio/Audition					False	
A maximum of units of PE and 3 units of Transfer Pass may be used towards graduation.						

Report Results page (3 of 3)

The academic advisement report prints in academic structure order. The career, program, and plan are listed. Depending on the print controls and options in force, specific requirements, requirement details, and courses used or needed to satisfy requirements print on the report.

Career level requirements print under the program levels on reports. Most students have only one career and one program. However, if a student has two programs (for example, LAU and FAU), then the UGRD level requirement prints under each declared program rather than under undergraduate requirements. As a result, a single requirement may appear more than once in an audit report even though it is required only once.

Note. There is a difference between processing order and reporting order. Processing order refers to the order in which courses are processed by the audit engine. Academic structure, requirement group number, and reporting sequence number affect processing order. Reporting order refers to the order in which courses, requirements, and requirement groups are printed in the audit report.

In general, the long description of the requirement groups, requirements, and requirement lines appear. Under each long description of the requirement groups and requirements, the report contains information regarding grade point average (GPA) and units. (Refer to Calculating GPAs for a detailed description of units earned versus units taken.) If the student has not met a requirement, the heading is printed in bold. If the requirement has been met, the heading is not bold.

When courses are printed, information concerning the term, course, course description, units, grade, and code appears in the report. (Courses are always printed in chronological order based on term.) Additionally, if any courses were transferred from an external organization, detail is listed. Codes include EN (regularly enrolled course credit), IT (internal transfer course credit), TE (test credit), OT (other credit), and TR (external transfer course credit).

Note. Course substitutions and overrides appear on the academic advisement transcript report. If a requirement group or requirement with a usage of *Student Individualized Plan* is overridden, this information appears at the bottom of the advisement report. Also, any discrepancy between the units that appear and the GPA calculation is noted. A discrepancy occurs if the units earned differ from the units taken.

Click the Print button to store a printable PDF version of the Report Results page in Report Manager.

Checking for Report Errors

Access the Report Errors page.

Seq Nbr (sequence number)	A sequential number that was system-supplied. This number determined the order in which the individual report requests were processed.
Sequence	Displays the message sequence number.
Message Text	Displays the error description.

Producing Batch Academic Advisement Reports

You can use the Batch Transcript Request component to process advisement reports for a large group of students.

To store data in the analysis database using the batch process, enter a value in the Transcript Type field that references the advising process and select the Database Report check box.

See Also

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Producing Transcripts,” Creating Batch Transcript Requests

Producing Quick What-If and Stored What-If Advisement Reports

This section provides an overview of what-if advisement reports and discusses how to:

- Select the course list what-if option.
- Enter a what-if course.
- Enter quick what-if parameters.
- Define a stored what-if program for a student.
- Define a stored what-if plan for a student.
- Define a stored what-if subplan for a student.

Understanding What-If Advisement Reports

Using the what-if advising capabilities, you can run a simulated advisement report for a student that shows degree progress based on courses the student proposes to take. You can also run a simulated academic advisement report that compares the student's transcript against multiple careers, programs, plans, and subplans. You can include individual courses with credit in the process. You can set conditions, such as multiple requirement terms, that enable you to use the appropriate requirement groups in the audit processing.

In addition, nonposted transfer credit can also be included in a what-if audit when the audit report is run from the self-service application. Modeling transfer credit enables students who are not term-activated, prospective applicants, or visitors to run a what-if audit using self-reported, completed, but not yet posted transfer credit. Instead of posting credit (which can only be accomplished if a student is term-activated), the model becomes completed. The internal equivalents are then available as input into the degree progress analysis, enabling the student, applicant, or visitor to view how many requirements of the proposed degree program have been satisfied. Only internal equivalents from models that have the same targeted program as the self-service model are picked up in the audit.

These what-if capabilities enable the academic advisor or student to run any number of degree audit reports based on what-if situations:

- The Course List What-If option is used to retrieve what-if individual courses from the established course catalog.
- The Quick What-If option is used to create a new what-if scenario (program, plan and sub-plan) for a student.
- The Stored What-If option is used to create or recall previously stored what-if information (program, plan, sub-plan, and requirement term) for a student.

You can use the Course List What-If option in combination with either the Stored What-If option or the Quick What-If option. You cannot use the Stored What-If option and the Quick What-If option at the same time. These combinations are possible: Course List What-If option alone, Course List What-If option and Stored What-If option, Course List What-If option and Quick What-If option, Stored What-If option alone, and Quick What-If option alone.

Pages Used to Define What-If Scenarios

Page Name	Object Name	Navigation	Usage
Course List What-If Analysis	SA_REQ_CRSE_WHIF	Click the Course List What-If link on the Request Detail page.	Select a course or list of courses from the course catalog to use during a what-if analysis.
Course Search	STDNT_CRSE_SECPNL	Click the Search button on the Course List What-If Analysis page.	Enter, review, and select a what-if course for use in a what-if analysis.
Quick What-If Analysis Report	SA_REQST_DTL_SEC2	Click the Quick What-If link on the Request Detail page.	Enter quick what-if parameters to run a simulated academic advisement report that compares the student's transcript against a one-time proposed academic career, program, plan, and subplan.
Program What-If	STDNT_PROG_WHIF	Academic Advising, Student Advisement, Set up "What-If" Data Click the Stored What-If link on the Request Detail page.	Define a stored what-if program scenario for a student.
Plan What-If	STDNT_PLAN_WHIF	Academic Advising, Student Advisement, Set up "What-If" Data Click the Stored What-If link on the Request Detail page.	Define a what-if plan scenario for a student.
SubPlan What-If	STDNT_SUBPLAN_WHIF	Academic Advising, Student Advisement, Set up "What-If" Data Click the Stored What-If link on the Request Detail page.	Define a what-if sub-plan scenario for a student.

Selecting the Course List What-If Option

Access the Course List What-If Analysis page.

Warning! Previously defined student course substitutions do not apply to what-if courses.

Enter the courses (if there is more than one course) in the order in which you want to simulate the courses being taken. If courses are required to be taken in a certain order (for example, 100-level courses before 200-level courses), then enter the simulated courses in the proper order.

Enter the Course ID or the Subject (with or without the catalog number) of the simulated course.

Click the Search button to retrieve available courses. The Course Search page appears.

If the course has a requirement designation attached to it, the system automatically selects the requirement designation and displays it in the Requirement Designation field. When you run the degree audit, the audit engine assumes successful completion of the what-if course and the requirement designation and displays the results on the Report Results page of the degree audit report. Remember that some courses are set up so that the student can opt to take the course with or without the requirement designation. If the student does not plan to take the course with the requirement designation, you can clear the requirement designation value from the Requirement Designation field. The audit engine will evaluate the course without the requirement designation. Consequently, if the degree requirement asks for the requirement designation to be completed, the what-if course will not satisfy a requirement. The requirement designation field is not editable when a course requirement designation is not optional.

Entering a What-if Course

Access the Course Search page.

Click the Select Course button to enter the course information on the Course List What-If Analysis page.

The system supplies the Units Taken field value on the Course List What-If Analysis page. You can change this value.

Entering Quick What-If Parameters

Access the Quick What-If Analysis Report page.

Quick What-If Analysis Report		
Adams, Kimberly	AA0001	PeopleSoft University
Current Information Career: Career Nbr: Program: Plan: Sub-Plan:	Overrides Career: Graduate Program Override: Graduate Liberal Arts Programs Plan Override: English-PhD SubPlan Override:	Requirement Term 2004 SmQt 2004 SmQt 2004 SmQt
OK Cancel Quick What-If Delete		

Quick What-If Analysis Report page

Career Information

Career Nbr (career number) Enter a value only if you want to override a student's specific career. Leave blank to override all of the student's careers.

Program Enter a value only if you want to override a student's specific program. Leave blank to override all of the student's programs.

Plan	Enter a value only if you want to override a student's specific plan. Leave blank to override all of the student's plans.
Sub-Plan	Enter a value only if you want to override a student's specific sub-plan. Leave blank to override all of the student's sub-plans.
Overrides	
Career	Enter the substitute or what-if career.
Program Override	Enter the substitute or what-if program.
Plan Override	Enter the substitute or what-if plan.
SubPlan Override	Enter the substitute or what-if sub-plan.
Requirement Term	
Career Requirement Term	Enter a what-if requirement term (catalog year) value for the career override. The system uses this value to select the correct effective-dated, career-level requirement groups.
Program Requirement Term	If you specify a program override, you must enter a what-if requirement term. The system uses this value to select the correct effective-dated, program-level requirement groups.
Plan Requirement Term	If you specify a plan override, you must enter a what-if requirement term. The system uses this value to select the correct effective-dated, plan-level requirement groups.
Sub-Plan Requirement Term	If you specify a sub-plan override, you must enter a what-if requirement term. The system uses this value to select the correct effective-dated, sub-plan level requirement groups.
Important! If you leave the Current Information group box fields empty, then only the override values are taken into account during the what-if analysis. Enter values in the Current Information group box fields if the student has multiple programs, plans, and sub-plans but only wants to override that specific program, plan, and sub-plan during the what-if analysis. In such a case, enter the appropriate field value to restrict the what-if analysis. For example, if a student's primary plan is Accounting (but the student has a second plan of Communications) and the override plan is Business with a requirement term of Fall 1998, the analysis overrides all of the existing plans (Accounting and Communications) if the Plan field in the Current Information group box is left blank. However, if you enter <i>Accounting</i> as the value for the Plan field in the Current Information group box, then the what-if analysis overrides the plan of Accounting only and retains the plan of Communication. Thus, the student is evaluated as a double major: Communication and Business.	
OK, Cancel, and Quick What-If Delete	Click OK to save and exit the Quick What-If Analysis Report page and return to the Request Detail page. Click Cancel to exit the page without saving the what-if information. Click Quick What-If Delete to delete all of the what-if field values.

Important! When you use the Quick What-If option, the student's academic record is temporarily (not permanently) modified. Any data that you enter through the Quick What-If Analysis Report page is used only once, because the data is not saved after you process the request.

Defining a Stored What-if Program for a Student

Access the Program What-If page.

The screenshot shows the 'Program What-If' page. At the top, there are three tabs: 'Program What-If' (selected), 'Plan What-If', and 'SubPlan What-If'. Below the tabs, the student's name 'Phillip Tam' and ID 'AA0022' are displayed. A 'Copy from student record' section has a 'Copy' button. The 'Program Status' is set to 'Active Only'. The main form contains fields for Academic Career (UGRD), Student Career Nbr (1), Status (INCL), Academic Institution (PSUNV), Academic Program (LAU), Admit Term (0290), Requirement Term (0290), Expected Grad Term, Career Requirement Term, Dual Academic Program, Campus (WALCR), and Acad Load (Full-Time).

Program What-If page

Copy

Click to retrieve the student's existing record. Values are automatically supplied in appropriate fields. The page must be in Add mode to create a new what-if program scenario. You can use these field values to build what-if career and program data. You can change field values and insert rows, as necessary.

Program Status

Displays the value selected when you used the Copy button.

If you selected *Active Only*, then all of the active careers, programs, plans, and sub-plans are copied and can be used in this program what-if scenario. If you selected *All Status*, then all of the careers, programs, plans, and sub-plans (both active and inactive) are copied and can be used in this program what-if scenario.

Academic Career and Student Career Nbr (number)

Appear by default from the prompt page.

The student's primary career is designated as student career number 0. You can change the career and student career number for use in the what-if scenario.

To create a stored what-if scenario with multiple programs tied to the same career, insert two rows of career and program data on this page. For example, you can insert a liberal arts program, as well as a fine arts program and tie each to a career of undergraduate. Be sure to attach the program that you want as the student's what-if primary academic program to the row with the lowest

student career number. In the example above, one of the rows would be *Undergraduate, Liberal Arts* and the other row would be *Undergraduate, Fine Arts*. Each of these rows would have a different student career number.

To create a stored what-if scenario with multiple careers, insert one additional row of data on this page for each additional career. For example, you can insert a liberal arts program tied to an undergraduate career, as well as a liberal arts program tied to a graduate career. In this case, all of the student career number field values should be 0. On this page, the student career number field values should only be different, if you want to identify which career among identical career values references the primary academic program.

Status	Enter how the program is processed in the what-if degree audit. Values include <i>INCL</i> : Indicates that the advisement status of the what-if career and program is included in the degree audit. This value appears by default. <i>NINC</i> : Indicates that the advisement status of the what-if career and program is not included in the degree audit. <i>OPT</i> : Indicates that the what-if career and program appear on the report but are not counted towards graduation.
Academic Institution	Enter the academic institution that contains the stored what-if scenario.
Academic Program	Enter the what-if academic program for the student.
Admit Term	Enter the term in which the student was admitted to the what-if program.
Requirement Term	Enter the what-if starting term of the student. Each requirement term has a begin and end date. The system uses this value to select the appropriate effective-dated program-level requirement groups.
Expected Grad Term (expected graduation term)	Enter the term in which the student is expected to graduate.
Career Requirement Term	Enter the career requirement term to determine which career-level requirement groups will be used in the audit. For example, all of the undergraduate requirements with an effective date prior to Fall 1999 are used in the audit if the career requirement term is Fall 1999.
Joint Prog Appr (joint program approved)	Select if the student has dual academic programs in this what-if scenario.
Dual Academic Program	Enter the dual academic program if the Joint Prog Appr check box is selected. If you enter a program, the student will have dual academic programs (as stated on this page) for this what-if scenario.
Campus	Enter the campus that the student attends.
Acad Load (academic load)	Enter the academic load for the student in this what-if scenario. Values include: <i>None</i> , <i>Full-Time</i> , and <i>Part-Time</i> . <i>Full-Time</i> appears by default. <i>None</i> converts to <i>Full-Time</i> . Each institution defines full-time and part-time academic loads.

Defining a Stored What-if Plan for a Student

Access the Plan What-If page.

Program What-If		Plan What-If		SubPlan What-If	
Phillip Tam			AA0022		
Find View All 1 of 1					
Academic Career:	UGRD		Student Career Nbr:	1	
Status:	Include		Admit Term:	1997 Fall	
Academic Program:	Liberal Arts Undergraduate		Requirement Term:	1997 Fall	
Plan Description Find View All 1 of 1					
*Academic Plan:	STATISTICS Statistics		+ -		
Plan Sequence:	10	Degree:	Concentration		
Advisement Status:	INCL Include	Degree Checkout Stat:			
*Requirement Term:	0290 1997 Fall	Student Degree Nbr:			
		Completion Term:			

Plan What-If page

Academic Plan

Enter the what-if academic plan for the student.

Plan Sequence

Enter the what-if plan sequence number that indicates the order (or sequence) of multiple plans or sub-plans, if any. The plan with the lowest sequence number is considered primary within the program.

Advisement Status

Enter the advisement status for this what-if academic plan that indicates how the plan is processed in the what-if degree audit. Values include: *INCL*, *NINC*, and *OPT*.

INCL: means that the advisement status of the what-if plan is included in the degree audit. This value appears by default.

NINC: Indicates that the advisement status of the what-if plan is not included in the degree audit.

OPT: Indicates that the what-if academic plan appears on the report but is not counted towards graduation.

Requirement Term

Enter the student's what-if starting term. Each requirement term has a begin and end date. The system uses this value to select the appropriate effective-dated plan-level requirement groups.

Degree

Displays the degree that is associated with the plan.

Degree Checkout Stat (status)

Displays the degree checkout status.

If you click the Copy (from student record) button on the Program What-If page, a value may appear. This value does not affect the what-if analysis.

Student Degree Nbr (number)

Displays the student degree number.

If you click the Copy (from student record) button on the Program What-If page, a value may appear. This value does not affect the what-if analysis.

Completion Term

Displays the student's anticipated completion term.

This value does not affect the what-if analysis. If you click the Copy (from student record) button on the Program What-If page, a value may appear.

Defining a Stored What-if Sub-Plan for a Student

Access the SubPlan What-If page.

Program What-If

Plan What-If

SubPlan What-If

Phillip TamAA0022

Find | View All

1 of 1

Academic Career:

UGRD

Student Career Nbr:

1

Status:

Include

Admit Term:

1997 Fall

Academic Program:

Liberal Arts Undergraduate

PeopleSoft University

Academic Plan

Find | View All

1 of 1

Academic Plan:

Statistics

Concentration

Requirement Term:

1997 Fall

Academic SubPlan

Find | View All

1 of 1

Sequence Number:

10

+

-

Academic Sub-Plan:

Academic Sub-Plan Type:

Advisement Status:

INCL

Include

*Requirement Term:

SubPlan What-If page

- Sequence Number

Enter the order (or sequence) of multiple sub-plans, if any. The sub-plan with the lowest sequence number is considered primary within the plan.
- Academic Sub-Plan

Enter the student’s what-if academic sub-plan.
- Academic Sub-Plan Type

Enter the appropriate academic sub-plan type prompts from the Academic Sub-Plan Table page.
- Advisement Status

Enter how the sub-plan is evaluated in the what-if degree audit. Values include:

INCL (default): Indicates that the advisement status of the what-if sub-plan is included in the degree audit.

NINC: Indicates that the advisement status of the what-if sub-plan is not included in the degree audit.

OPT: Indicates that the what-if academic sub-plan appears on the report but is not counted towards graduation.
- Requirement Term

Enter the start term for the subplan what-if analysis.

The system uses the start date for the term to select the appropriate effective-dated sub-plan-level requirement groups.

Processing Self-Service Advisement Reports

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, “Using Self-Service Advisement,” Processing Self-Service Advisement Reports.

CHAPTER 13

Using the Analysis Database to Create User Configurable Reports

This chapter provides an overview of the analysis database and discusses how to:

- Populate the analysis database tables.
- Print the contents of the analysis database.
- Create a user-defined advisement report using the analysis database.

Understanding the Analysis Database

The analysis database integrates the power of the academic advising transcript with a large number of student data result tables.

On the Request Header page, one of the field values for Report Format is *Analysis Database*. The analysis database report format is a special report format that is computer-friendly rather than people-friendly. The report is written in computer-readable format, which enables you to write application programs against the analysis database tables. When the value in the Report Format is *Analysis Database*, the report data is written to and stored in the analysis database tables. Using this database, you can then prepare user-configurable reports using Crystal, SQR, or OLAP.

More information is stored in the analysis database tables than appears in the printed report formats. The database tables contain keys for each object in the report that an application program can use to reference other objects in the student's record that are not contained in the printed report. The analysis database contains data on courses that were considered for satisfying a requirement, but rejected. It also contains information on courses captured by global limits.

You can reuse the data stored in these academic advisement analysis tables. You can query the tables for data. To maximize performance, avoid overly complex joins. In most cases, performance severely degrades when more than five tables are joined in one SQL statement. These tables do not automatically purge and must be updated to remain current. Your database administrator must write a script to purge the files. The table data is only accurate for the date on which you run the report. If multiple processes of the same transcript type for the same student occur on a single day, the system uses the analysis database sequence number to keep the data separate for each report.

There are several things you can do to maximize performance when writing reports against the analysis database. When using Crystal reports, create a temporary table where the data to be reported is denormalized into one table. Then use one SQL statement to retrieve the data in a sorted order, using breaks on the data to control the output. Do this to overcome the performance degradation that occurs when using multiple Crystal subreports in one report. You can improve performance by creating indices on the analysis database tables, so joins are on the indices. Setting the initial size of the tables correctly also improves performance. Your database administrator can perform this task. If the tables are not sized correctly, performance could quickly degrade as the tables grow.

Populating the Analysis Database Tables

You can populate the analysis database tables by running the transcript request process for a single student or small group of students (through the Transcript Request component), or for a large population of students (through the Transcript Generation component).

Here's how to populate the analysis database tables for a small group of students:

1. Access the Request Header page.
2. Specify an advising transcript type in the Transcript Type field.
3. Specify a report type of *Analysis Database* in the Report Type field.

Running the transcript process using this option sends the results of the advising report to the analysis database tables, instead of to a flat, printable, advising report.

4. Access the Request Detail page and enter the student IDs for the processing group.
5. (Optional) Enter what-if parameters.
6. If you have a small number of IDs to process, click the Process Request button to process the request and populate the analysis database tables.

If you have a large number of IDs to process, save the request, note the request number, and then run the process through the Transcript Generation component.

Here's how to populate the analysis database tables for a large group of students (batch mode):

1. Access the Batch Transcript Request page.
2. Specify an advising transcript type in the Transcript Type field.
3. Select the Database Report check box.
4. Specify the parameters for the processing group.
5. Click the Run button to process the request and populate the analysis database tables.

See Also

Chapter 12, "Processing Academic Advisement Reports," page 163

PeopleSoft Enterprise Student Records 8.9 PeopleBook, "Producing Transcripts," Creating Batch Transcript Requests

Printing the Contents of the Analysis Database

Use the Database Tables Report component to retrieve all of the data in each academic advisement table for a specific student or group of students on a specific date. Before creating a user configurable report, you can run this report to view the data that is available for the student. On any specific day, you can run one standard and one special report for a student.

Pages Used to Print the Contents of the Analysis Database

Page Name	Object Name	Navigation	Usage
Database Tables Report	RUNCTL_SRDBTBLS	Academic Advising, Advising Reports, Database Tables	Enter the parameters to capture the student population on which you want to report, and process the report.

Processing the Database Tables Report

Access the Database Tables Report page.

Database Tables Report

Run Control ID: PSDF [Report Manager](#) [Process Monitor](#)

*As of Date:

ID:

Report Type: Standard Report

Database Tables Report page

As of Date	The Database Tables report accurately reflects the contents of each academic advisement table for the designated student as of this date. The current date is the default field value, but you can modify it. You must enter a value in this field.
ID	Enter the student's ID or leave blank to return all of the values.
Report Type	Enter the report type. Values include: <i>SPC</i> : Indicates a report with a special requirement usage. <i>STD</i> : Indicates a standard advising report.

Note. The Database Tables report is not as robust as the analysis database tables themselves (where multiple reports for a student in a single day are organized by an analysis database sequence number). If you process multiple reports for a student with the same report type on a single day, all of the data for the day appears on the Database Tables report.

Creating a User-Defined Advisement Report Using the Analysis Database

You may want to query the analysis database for many reasons. For example, you may want to know how many undergraduate students have not satisfied their math requirement. This data may even help you decide how many sections of a class to schedule in a subsequent term. Or, you may want to create a report that displays the career, program, and plan of all students who have met all their degree requirements.

You can query the analysis database using PeopleSoft Enterprise Query or your database's query tool such as Microsoft's Query Analyzer, Oracle's SQL Plus, or IBM's Command Center.

Note. Pay close attention to the automatic join created by PeopleSoft Enterprise Query. When joining certain tables, the query tool creates the join using the ENTRY_SEQ field. Leaving this field in the join may result in no data being returned.

After retrieving data, use Crystal Reports, SQR, or OLAP to create a report that meets your needs. To do this, you can use most tools that coordinate with SQL.

Reviewing the Academic Advisement Analysis Database Tables

At a minimum, tables from the analysis database always contain these column headings: ID, RPT_DATE, RPT_TYPE, and ANALYSIS_DB_SEQ.

The following describes the table R_REPORT:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
WHAT_IF_FL		Char	1	What-If Flag
REPORT_REQUEST_NBR		Char	9	Report Request Nbr
INSTITUTION		Char	5	Academic Institution
TSCRPT_TYPE		Char	5	Transcript Type

The following describes the table, R_ORDER:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ENTRY_R_TYPE		Char	6	Valid Types: Career ('KEYCAR'), Program ('KEYPRG'), Plan ('KEYPLN'), Sub-Plan ('KEYSUB'), Requirement Group ('KEYRQG'), Requirement ('KEYREQ'), and Requirement Line ('KEYRQL').

The following describes the table, R_RQRMNT_GROUP:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
RQRMNT_GROUP	Y	Char	6	
RQ_DATE		PSDATE		Effective Date of Requirement Group

Column Name	Key	Data Type	Length	Comments
ENTRY_R_STATUS		Char	4	
PARTITION_FAIL		Char	1	Partition Fail Flag

The following describes the table, R_RG_LINK:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	

The following describes the table, R_TRANSCRIPT:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
CRSE_TAG	Y	Char	4	
INSTITUTION		Char	5	

Column Name	Key	Data Type	Length	Comments
SRC_INSTITUTION		Char	5	
ACAD_CAREER		Char	4	
SRC_CAREER		Char	4	
CRSE_CAREER		Char	4	
STRM		Char	4	Term
APPLIED_TERM		Char	4	
TERM_TAKEN		Char	4	
CLASS_NBR		Char	5	
STDNT_ENRL_STATUS		Char	2	
UNT_TAKEN		Decimal	3.2	
UNT_PRGRSS		Decimal	3.2	
GRADING_BASIS_ENRL		Char	3	
CRSE_GRADE_OFF		Char	3	
REPEAT_CODE		Char	4	
ASSOCIATED_CLASS		Smallint	4	
AUDIT_GRADE_BASIS		Char	1	
EARN_CREDIT		Char	1	

Column Name	Key	Data Type	Length	Comments
INCLUDE_IN_GPA		Char	1	
UNITS_ATTEMPTED		Char	1	Valid Choices: In Progress ('I') and Attempted ('Y').
GRADE_POINTS		Decimal	6.3	
CRSE_ID		Char	6	
CRSE_OFFER_NBR		Char	2	
SESSION_CODE		Char	3	
CLASS_SECTION		Char	4	
ACAD_GROUP		Char	5	
SUBJECT		Char	8	
CATALOG_NBR		Char	10	
DESCR		Char	30	
COMPONENT		Char	3	
CRS_TOPIC_ID		Decimal	3	
EQUIV_CRSE_ID		Char	5	
OVRD_CRSE_EQUIV_ID		Char	1	
START_DT		PSDATE		
END_DT		PSDATE		
CRSE_COUNT		Decimal	2.2	

Column Name	Key	Data Type	Length	Comments
CLASS_ENRL_TYPE		Char	1	
RQ_SCHOOL_TYPE		Char	4	
UNT_EARNED		Decimal	3.2	

The following describes the table, R_SUBSTITUTION:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
CRSE_TAG	Y	Char	4	
ACAD_GROUP		Char	5	
CRSE_ID		Char	6	
SUBJECT		Char	8	
CATALOG_NBR		Char	10	
DESCR		Char	30	
OPRID		Char	8	
DESCR254A		Char	254	

The following describes the table, R_REQUIREMENT:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_DATE		PSDATE		Effective Date of Student's Requirement
ITEM_R_STATUS		Char	4	
PARTITION_FAIL		Char	1	Partition Fail Flag

The following describes the table, R_RQRMNT_LINE:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		

Column Name	Key	Data Type	Length	Comments
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_LINE_NBR	Y	Char	4	
ITEM_R_STATUS		Char	4	
DISP_SELECT_LINE		Char	1	
REQ_LINE_TYPE		Char	3	

The following describes the table, R_CAREER:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ACAD_CAREER	Y	Char	4	
CAR_DATE		PSDATE		
ITEM_R_STATUS		Char	4	

The following describes the table, R_ACAD_PROG:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ACAD_PROG	Y	Char	5	
ACAD_CAREER		Char	4	
ITEM_R_STATUS		Char	4	

The following describes the table, R_ACAD_PLAN:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ACAD_PLAN	Y	Char	10	
ACAD_CAREER		Char	4	
ACAD_PROG		Char	5	
ITEM_R_STATUS		Char	4	

The following describes the table, R_ACAD_SUBPLAN:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ACAD_SUB_PLAN	Y	Char	10	
ACAD_CAREER		Char	4	
ACAD_PROG		Char	5	
ACAD_PLAN		Char	10	
ITEM_R_STATUS		Char	4	

The following describes the table, R_COURSE_USEAGE:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		

Column Name	Key	Data Type	Length	Comments
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_LINE_NBR	Y	Char	4	
CRSE_TAG	Y	Char	4	
SEL_PROCESS_TYPE		Char	3	Valid Types: Verify ('VER'), Sequence ('SEQ'), Limit ('LIM'), and Standard ('STD').
SEL_MODE		Char	1	Valid Modes: Selected ('S'), Not Selected ('N'), and Excluded ('X').
IN_PROGRESS_GRD		Char	1	In Progress Flag: In Progress ('Y').

The following describes the table, R_COND_USEAGE:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	

Column Name	Key	Data Type	Length	Comments
RQ_LINE_NBR	Y	Char	4	
CONDITION_CODE	Y	Char	3	
CONDITION_OPERATOR	Y	Char	2	
CONDITION_DATA	Y	Char	10	

The following describes the table, R_UNIT_CRSE_GPA:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
UNITS_REQUIRED		Decimal	4.2	
UNITS_NEEDED		Decimal	4.2	
CRSES_REQUIRED		Decimal	4.2	
CRSES_NEEDED		Decimal	4.2	
GPA_REQUIRED		Decimal	3.3	
GPA_ACTUAL		Decimal	3.3	

The following describes the table, R_DESCRIPTION:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
DESCR_LN_NBR	Y	Smallint		
DESCR254		Char	254	

The following describes the table, R_OVERRIDE_RG:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
RQ_RG_OVRD_ACTION		Char	4	
OLD_UNITS		Decimal	4.2	
NEW_UNITS		Decimal	4.2	

Column Name	Key	Data Type	Length	Comments
OLD_CRSES		Decimal	4.2	
NEW_CRSES		Decimal	4.2	
REF_RQMT_GROUP		Char	6	
OPRID		Char	30	
DESCR254A		Char	254	

The following describes the table, R_OVERRIDE_RQ:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT		Char	9	
RQ_OVRD_ACTION		Char	4	
OLD_UNITS		Decimal	4.2	
NEW_UNITS		Decimal	4.2	
OLD_CRSES		Decimal	4.2	

Column Name	Key	Data Type	Length	Comments
NEW_CRSES		Decimal	4.2	
REF_REQUIREMENT		Char	9	
OPRID		Char	30	
DESCR254A		Char	254	

The following describes the table, R_OVERRIDE_LN:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_LINE_NBR	Y	Char	4	
RQ_LN_OVRD_ACTION		Char	4	
OLD_MIN_UNITS		Decimal	4.2	
NEW_MIN_UNITS		Decimal	4.2	

Column Name	Key	Data Type	Length	Comments
OLD_MAX_UNITS		Decimal	4.2	
NEW_MAX_UNITS		Decimal	4.2	
OLD_MIN_CRSES		Decimal	4.2	
NEW_MIN_CRSES		Decimal	4.2	
OLD_MAX_CRSES		Decimal	4.2	
NEW_MAX_CRSES		Decimal	4.2	
OPRID		Char	30	
DESCR254A		Char	254	

The following describes the table, R_COURSE_DIRECT:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	

Column Name	Key	Data Type	Length	Comments
RQ_LINE_NBR	Y	Char	4	
CRSE_TAG	Y	Char	4	
OPRID		Char	30	
DESCR254A		Char	254	

The following describes the table, R_RQDPLN_HEADER:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
PLANS_NEEDED		Smallint		

The following describes the table, R_RQDPLN_DETAIL:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type

Column Name	Key	Data Type	Length	Comments
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
ACAD_CAREER	Y	Char	4	
ACAD_PROG	Y	Char	5	
ACAD_PLAN	Y	Char	10	
ACAD_SUB_PLAN	Y	Char	10	

The following describes the table, R_WHAT_IF:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ACAD_CAREER		Char	4	
ACAD_CAREER_OVRD		Char	4	
CAR_REQ_TERM		Char	4	
ACAD_PROG		Char	5	

Column Name	Key	Data Type	Length	Comments
ACAD_PROG_OVRD		Char	5	
ACAD_PROG_TERM		Char	4	
ACAD_PLAN		Char	10	
ACAD_PLAN_OVRD		Char	10	
ACAD_PLAN_TERM		Char	4	
ACAD_SUB_PLAN		Char	10	
ACAD_SUB_PLAN_OVRD		Char	10	
ACAD_SUB_PLAN_TERM		Char	4	

APPENDIX A

Course Limit Examples

This appendix is a supplement to the general documentation on limits, and provides examples and detailed instructions for setting up two types of course limit requirements:

- Local unit, course, or GPA limit requirement.
- Global course limit requirement.

See Also

Chapter 5, “Setting Up Academic Requirements,” Creating a Requirement Line Item, page 52

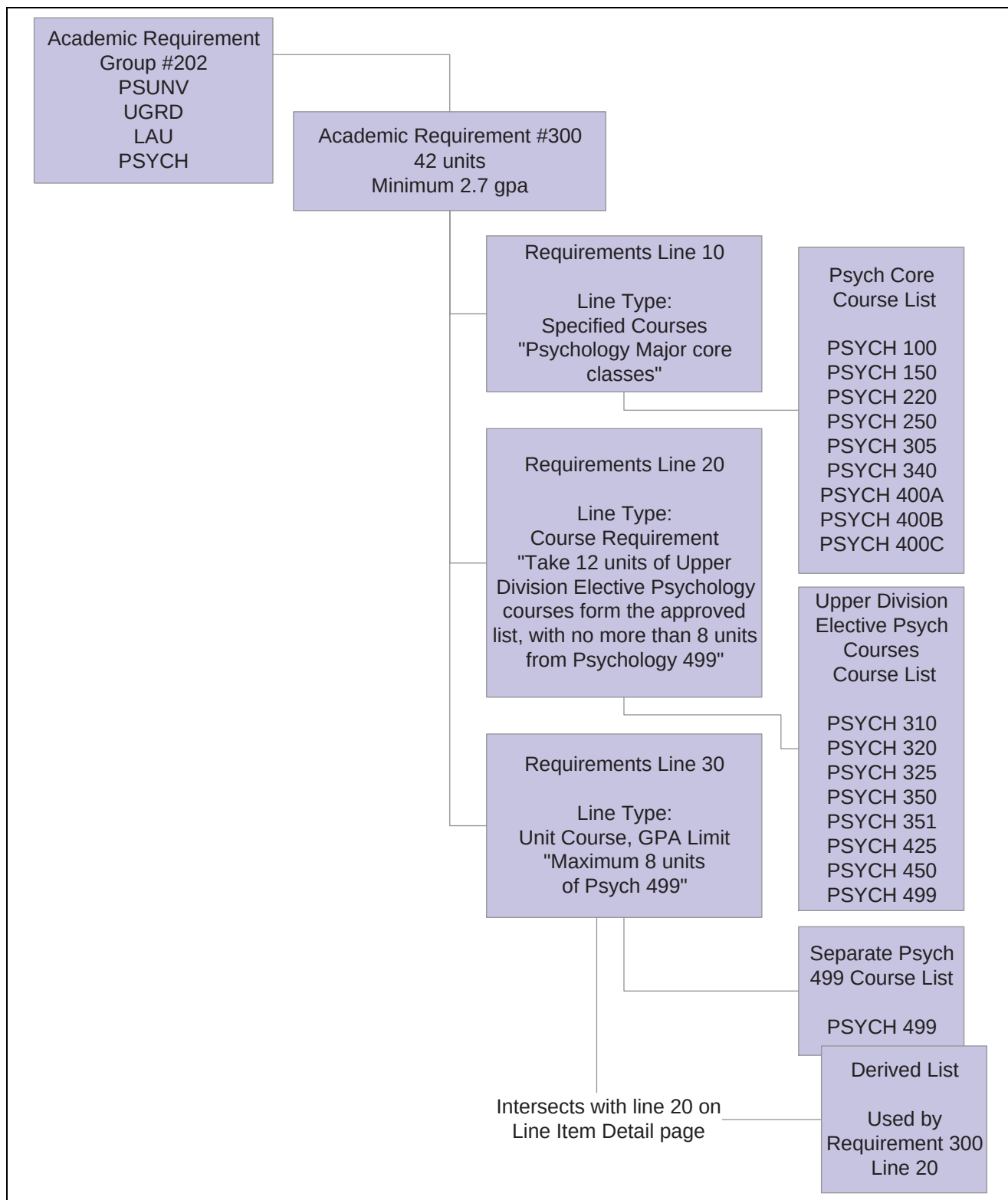
Setting Up a Local Unit, Course, or GPA Limit Requirement

Local limit requirements work to limit the number of units or courses that can be counted toward a specific requirement group, requirement, or requirement line. With the use of more advanced derived lists, local limits can also apply to a dynamically generated group of targets (such as all courses used by a particular plan). Unlike their *global* course limit requirement counterpart, *local* course limit requirements have a specific target to which they apply, even if that target is dynamically generated from a derived list.

Here’s how to set up a simple local course limit requirement:

1. Create an academic course list that includes the course or courses that you want to limit. For example, Psychology 499 (to represent a special course for independent research that is repeatable, but that can count towards graduation up to a maximum of 8 units.)
2. Locate an existing *All Stats* academic requirement Line Item that requires or includes as options these same courses. For example, the Psychology Major requirement.
3. For the same requirement mentioned in step 2, add another line item with a Line Type of *Unit, Course, or GPA Limit*.
4. On the Line Item Params page, for the *Unit, Course, or GPA Limit* line, specify a Maximum Units Allowed value of 8, and a Maximum Courses Allowed value of 999. The system will obey the lower of the two limit numbers (in this case, *8 units*).
5. Access the Line Item Detail page for the limit line, and attach the course list you created in step 1.
6. To target the course limit to a requirement, intersect the course list for the limit line with a derived list that specifies the target in greater detail. For example, if the requirement has multiple requirement lines, and you want the maximum 8 units of Psychology 499 requirement to apply only to one of many lines in the requirement:
 - a. On the Line Item Detail page, insert a second Line Detail Type of *DLST*. Select a List Include Mode of *Y — Intersection With*. Select a List Recall Mode of *Used by Requirement*, and specify the requirement and line number that you specifically want to limit.
 - b. Save the requirement.

The following diagram displays an overview of how to set up a local unit, course, or GPA limit requirement:



Unit, course, or GPA limit structure

Setting Up a Global Course Limit Requirement

Global limit requirements work to limit the number of units or courses that can be counted toward an overall advising report. Unlike their *local* course limit requirement counterpart, *global* course limit requirements typically have no specific target requirement, and go into effect as soon as they are encountered by the advising system.

The exception to the rule of global limits not requiring targets is when you want to apply a global limit to requirements that capture courses through a Credit Include Mode of *Verify*. As you will see in the following exhibit diagram, to enforce a global limit on Verify requirements, you must subtract a derived list of *Used By (your global limit)* from the Global Limit target requirement.

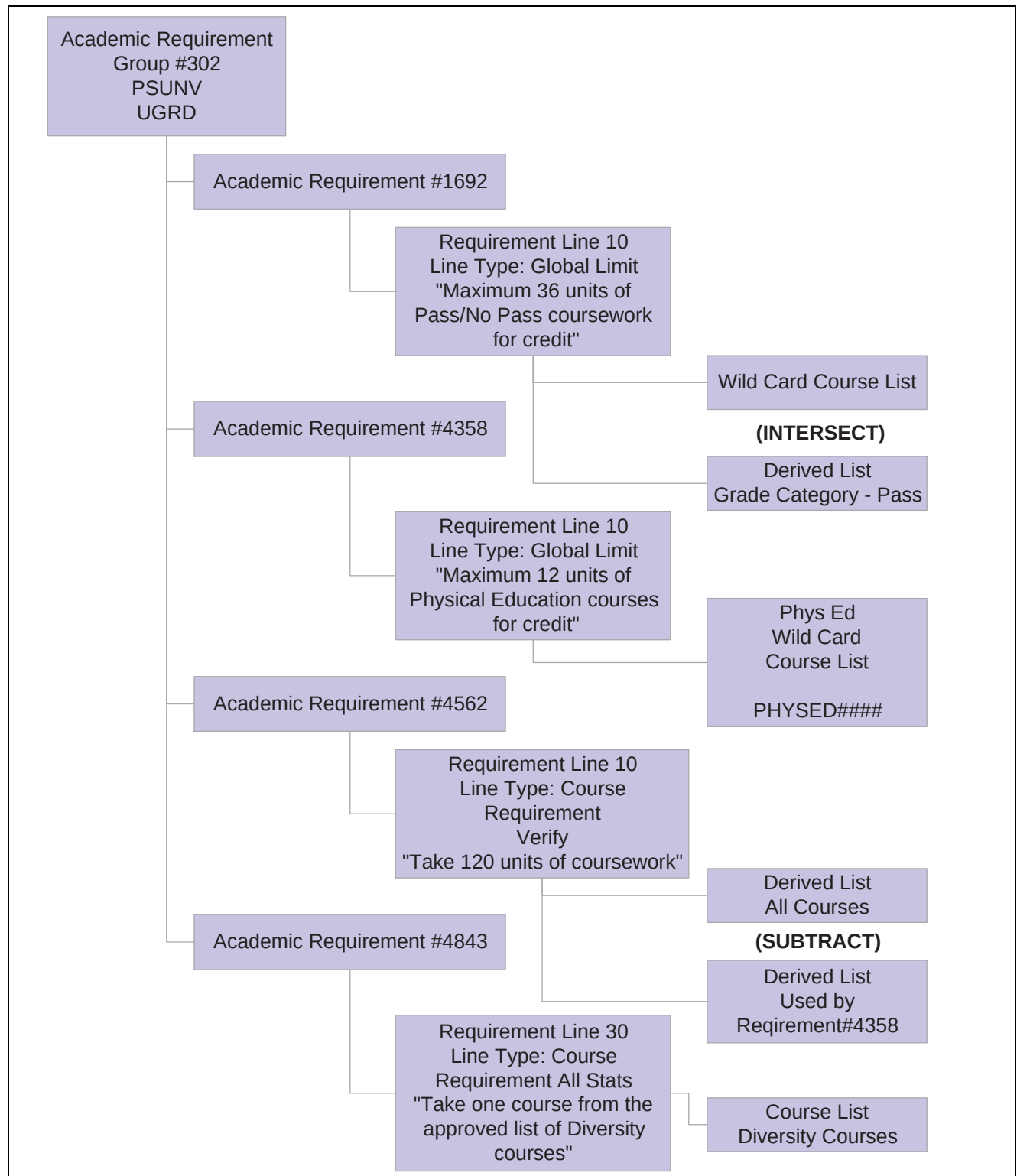
Reporting sequence and academic structure determine the order in which academic requirement groups are encountered.

See [Chapter 6, “Setting Up Academic Requirement Groups,” Understanding Academic Requirement Groups, page 79](#).

Follow these steps to set up a global course limit:

1. Create an academic course list that includes the courses you want to globally limit, or design a derived list that will capture the same group. For example, *Physical Education ###*, or a derived list of Grade category equal *Pass/No Pass* courses, respectively.
2. Create an academic requirement that houses the global limit, instead of attaching the limit as a requirement line (like you do for a local unit, course, or GPA limit). In the academic requirement, set the Line Type to *Global Limit* on the Line Item page, define maximum parameters on the Line Item Parameters page, then attach your course list or derived course list on the Line Item Detail page. By setting up the global limit requirement as a separate requirement, you can reuse it across requirement groups at the institution (which is typically the case with global course limits).
3. Save the academic requirement, and attach it to the highest level requirement groups for each group of students to whom you want this to apply. You can either attach it to a career level requirement group (so that it applies to all programs within the career), a program level requirement group (so that it applies to students in the programs that you specify), a plan level requirement group, or even a subplan level requirement group. What is important to note is that the system begins enforcing the global limit only when it is encountered by the advisement engine. Therefore, the higher you place the global limit, the sooner the system will “see” the requirement and begin enforcing it.

The following diagram displays an overview of how to set up two types of global course limits, one that stands alone, and another that both stands alone and limits a *Verify* requirement.



Global limit structure

APPENDIX B

Sequential Restriction Examples

This appendix is a supplement to the general documentation on sequential restrictions, and provides examples and detailed instructions for setting up two types of sequential restriction requirements:

- Local sequential restriction requirement.
- Global sequential restriction requirement.

See Also

Chapter 5, “Setting Up Academic Requirements,” Creating a Requirement Line Item, page 52

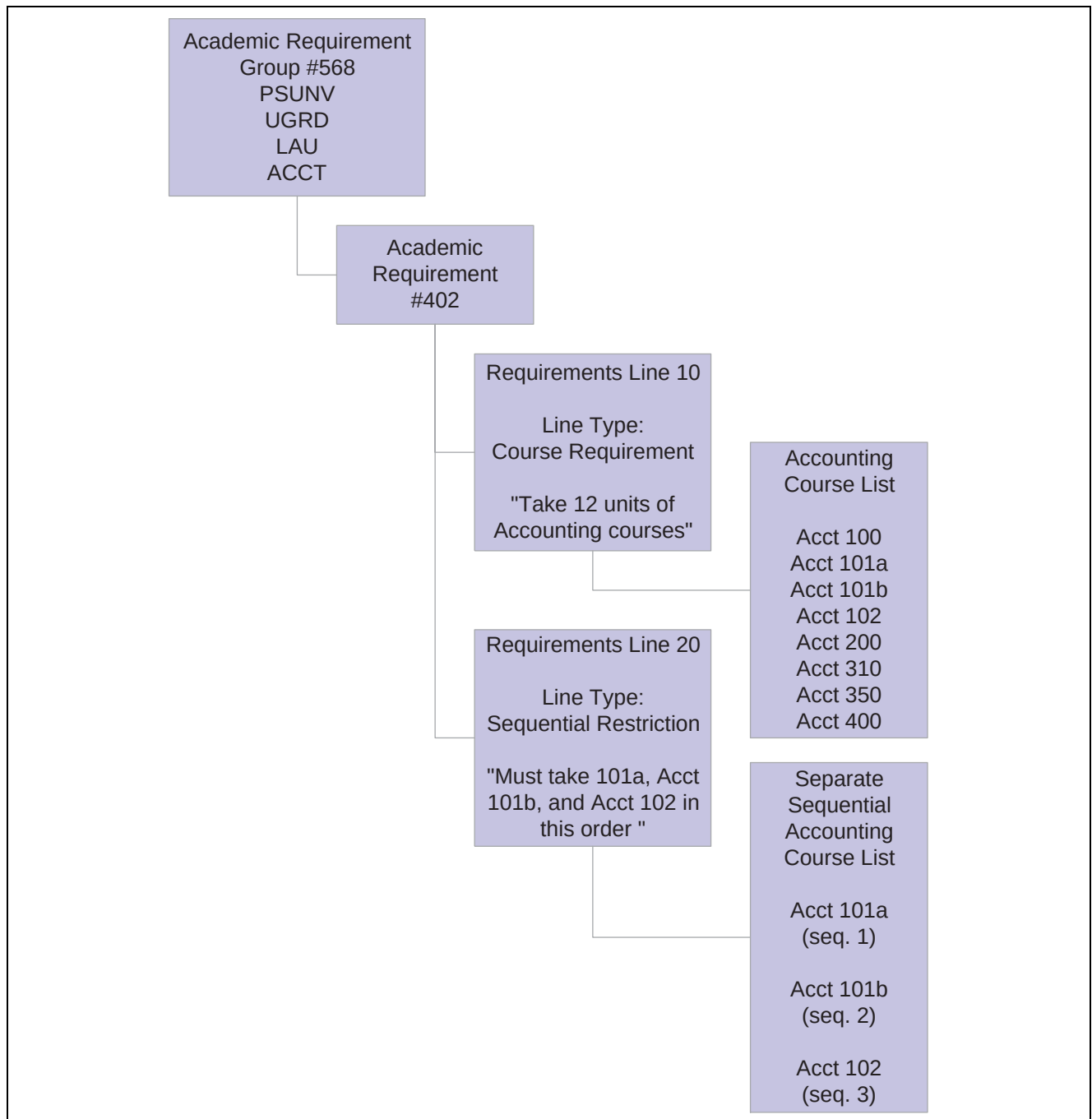
Setting Up a Local Sequential Restriction Requirement

Local restriction requirements enforce course completion in a particular order, for a specific requirement group, requirement, or requirement line. With the use of more advanced derived lists, local sequential restriction requirements can also apply to a dynamically generated group of targets (such as all courses used by a particular plan). Unlike their *global* sequential restriction counterpart, *local* sequential restriction requirements have a specific target to which they apply.

Here’s how to set up a simple local sequential restriction requirement:

1. Create an academic course list that includes the courses for which you want to control sequence. For example, Accounting 100a (course sequence 1), Accounting 100b (course sequence 2), and Accounting 200 (course sequence 3). Make sure that the course sequence value is assigned to the correct course on the Course Detail page.
2. Locate an existing *All Stats* academic requirement Line Item that requires these same courses. For example, the Accounting Minor requirement, which requires 18 units total, and points to a course list of many Accounting courses, in no particular order.
3. In the same requirement mentioned in step 2, add a second line item with a Line Type of *Sequential Restriction*.
4. Access the Line Item Detail page for line 20, and attach the special sequential restriction course list you created in step 1.
5. Save the requirement. By default, the target of your sequential restriction line item will be the current requirement. So, if you do not specify a target, you can save the requirement and simply attach it to a requirement group that applies to Accounting Minors.

The following diagram displays an overview of how to set up a local sequential restriction requirement.



Local sequential restriction requirement structure

Setting Up a Global Sequential Restriction Requirement

Global restriction requirements work to enforce that only those courses taken in a particular sequence can apply toward the advising report. Unlike their local sequential restriction counterpart, *global* sequential restriction requirements have no specified target (their default target is the entire audit), and they go into effect as soon as they are encountered by the advisement engine process (based on reporting sequence).

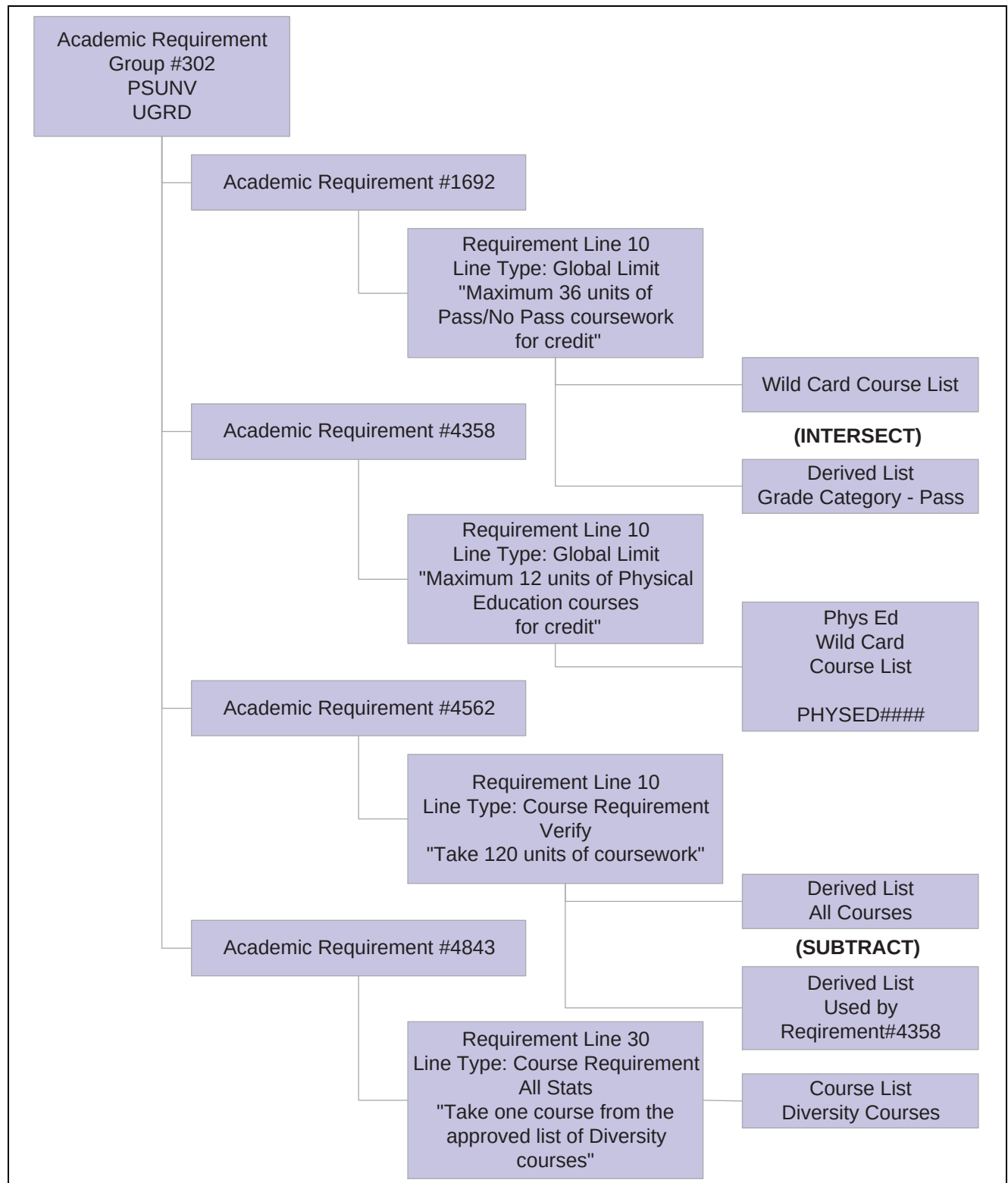
Reporting sequence and academic structure determine the order in which academic requirement groups are evaluated.

See [Chapter 6, “Setting Up Academic Requirement Groups,” Understanding Academic Requirement Groups, page 79](#).

Here’s how to set up a global sequential restriction requirement:

1. Create an academic course list that includes the courses for which you want to globally control course sequence. For example, Spanish 100 (course sequence 1), Spanish 200 (course sequence 2), Spanish 300 (course sequence 3), and Spanish 330 (course sequence 4). Make sure that the course sequence value is assigned to the correct course on the Course Detail page.
2. Create an academic requirement that solely houses the sequential restriction, instead of attaching the sequential restriction as an additional requirement line (like you do for a local sequential restriction requirement). In the academic requirement, set the Line Type to *Global Sequential Restriction* on the Line Item page, then attach your course list on the Line Item Detail page. By setting up the sequential requirement as a separate requirement, you can reuse it across requirement groups at the institution (which is typically the case with global sequential restrictions).
3. Save the academic requirement, and attach it to the highest level requirement group for each group of students to whom you want this to apply. You can either attach it to a career level requirement group (so that it applies to all programs within the career), a program level requirement group (so that it applies to students in the programs that you specify), a plan level requirement group, or even a subplan level requirement group. What is important to note is that the system begins enforcing the global sequential restriction only when it is encountered by the advisement engine. Therefore, the higher you place the sequential restriction requirement, the sooner the system will “see” the requirement and begin enforcing it.

The following diagram displays an overview of how to set up a global sequential restriction requirement.



Global sequential restriction requirement structure

APPENDIX C

Academic Advisement Reports

This appendix enables you to view summary tables of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools PeopleBook: Process Scheduler

Academic Advisement Reports: A to Z

This table lists the Academic Advisement reports, sorted alphabetically by report ID.

Report ID and Report Name	Description	Navigation	Run Control Page
SRCNDTBL Entity Group Table and Condition Table Reports	The condition table report lists all the dynamic conditions for the institution as of the As of Date field value. (SQR)	Academic Advising, Advising Reports, Miscellaneous Reports	RUNCTL_SRMISRPT
SRDBTBLS Database Tables report	The database tables report lists all data stored in each academic advisement table for a specific student on a specific date. (SQR)	Academic Advising, Advising Reports, Database Tables	RUNCTL_SRDBTBLS
SRGRPADV Advisement Group Summary report	The advisement group summary report lists the contents (or structure) of a specific requirement group or all requirement groups that meet the criteria established for the report. This report is an easy way to verify the requirement groups for any academic program or plan. For example, if you need a printout of all the requirement groups that are defined for an undergraduate psychology major, you can run this report. (SQR)	Academic Advising, Advising Reports, Academic Requirement Group	RUNCTL_SRGRPADV

Report ID and Report Name	Description	Navigation	Run Control Page
SRREVENG Reverse Engineering report	The reverse engineering report lists the results of a search for a requirement, course, course list, or condition. This report includes enrollment and academic advisement requirement groups, requirements, and course lists. (SQR)	Academic Advising, Advising Reports, Reverse Engineering	RUNCTL_SRREVENG
SRRQRADV Requirement Advisement report	The requirement advisement report lists the contents (or structure) of a specific requirement or all requirements that meet the criteria established for the report. This report is an easy way to verify the requirements for any academic program or plan. For example, if you need a printout of all the requirements that are defined for an undergraduate psychology major, you can run this report. (SQR)	Academic Advising, Advising Reports, Academic Requirement	RUNCTL_SRRQRADV
SRTRPRNT Advisement report or Transcript report	All advisement reports for a transcript request, or all transcripts for a transcript request. The transcript type you specify at run time determines which format the system uses (advisement or transcript). The advisement report is the degree audit report that reflects a student's progress toward graduation. This report is the core function of the Academic Advisement application. The transcript report reflects a student's course work, organized chronologically or by term. This report is used primarily by the PeopleSoft Enterprise Student Records application. (SQR)	Records and Registration, Transcripts, Batch Transcripts, Transcript Print	RUNCTL_SRTRPRINT

Report ID and Report Name	Description	Navigation	Run Control Page
SR777 Advisement report or Transcript report	A singular advisement report, or a singular transcript report. The transcript type you specify at run time determines which format the system uses (advisement or transcript). The advisement report is the degree audit report that reflects a student's progress toward graduation. This report is the core function of the Academic Advisement application. The transcript report reflects a student's course work, organized chronologically or by term. This report is used primarily by the Student Records application. (Crystal)	Academic Advising, Student Advisement, Student Advisement Report, Report Results	SA_REPORT_RESULTS
SR778M Advisement report or Transcript report	All advisement reports for a transcript request, or all transcripts for a transcript request. The transcript type you specify at run time determines which format the system uses (advisement or transcript). The advisement report is the degree audit report that reflects a student's progress toward graduation. This report is the core function of the Academic Advisement application. The transcript report reflects a student's course work, organized chronologically or by term. This report is used primarily by the Student Records application. (Crystal)	Academic Advising, Student Advisement, Student Advisement Report, Request Detail	SA_REQUEST_DETAIL

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

	PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i>.
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollout structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.

document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.
product line	The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i>. See <i>record input VAT flag</i>.
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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