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PeopleSoft Campus Solutions 9.2: Academic Advisement

April 2022

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PeopleSoft Campus Solutions 9.2: Academic Advisement
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

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In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
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.
. . . (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.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

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ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

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Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft CS Related Links

Hosted Online Help Home

PeopleSoft Information Portal

My Oracle Support

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started with Academic Advisement

Academic Advisement Overview

Academic Advisement is the application within PeopleSoft 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 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 later in the documentation.

Academic Advisement Integrations

Academic Advisement integrates with these PeopleSoft applications:

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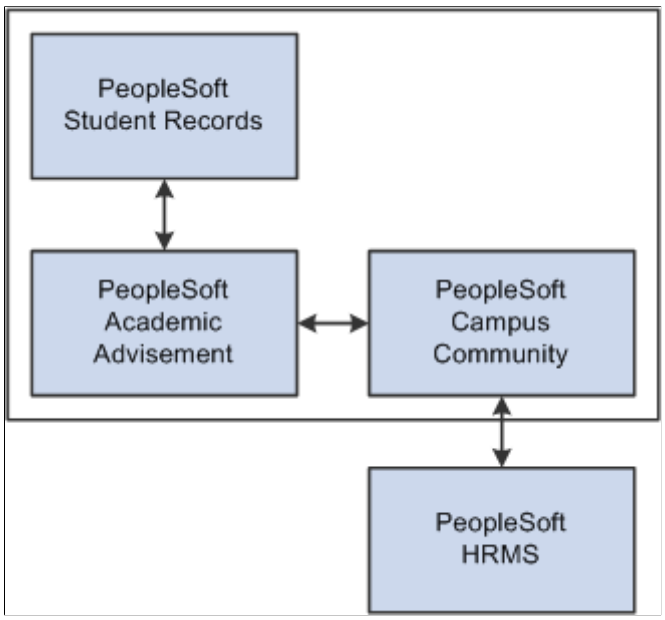
This diagram depicts Academic Advisement integrations.



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 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 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.

Related Links

"Selecting Student Administration Installation Options" (Campus Solutions Application Fundamentals)

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Academic Advisement Implementation

PeopleSoft 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 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.

- See the product documentation for *PeopleTools: Setup Manager*
- See the product documentation for *PeopleTools: Component Interfaces*

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.

Step	***Reference***
Define PeopleSoft Student Records data.	Student Records documentation
Define Academic Advisement installation options.	See "Understanding Installation Setup and System Defaults" (Campus Solutions Application Fundamentals).
Define grade category values.	See Setting Up Grade Category Values.
Define cumulative GPA values.	See Setting Up Cumulative GPA Values.
Define special requirement usage values.	See Setting Up Special Requirement Usage Values.
Define advising transcript types.	See Producing Quick What-If and Stored What-If Advisement Reports. See "Designating Degree and Program Data" (Student Records).
Define academic course lists.	See Setting Up Academic Course Lists.
Define academic requirements.	See Setting Up Academic Requirements.

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Step	*Reference*
Define academic requirement groups.	See Setting Up Academic Requirement Groups.
Define course share sets.	See Understanding Course Sharing.
Define dynamic conditions and entity groups.	See Defining Custom ConditionsDefining Expanded Conditions.
Define student exceptions and overrides.	See Setting Up Course Directives and Advisement Overrides .
(Optional) Define self-service advising options.	See "Viewing Self-Service Advisement Transcripts" (Campus Self Service).

Additional Information for Getting Started with Academic Advisement

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation: Campus Solutions Application Fundamentals documentation and Campus Community Fundamentals documentation.

See Campus Solutions Application Fundamentals

See Campus Community Fundamentals

For information about deferred processing, see "Additional Information for Getting Started with Campus Solutions" (Campus Solutions Application Fundamentals).

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Chapter 2

Understanding Academic Advisement

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: As mentioned, academic requirement groups consist of academic requirements that are satisfied by course lists. However, in order for the academic advisement portion of PeopleSoft 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. Therefore, in the Academic Advisement navigation, the setup components are listed in this order: Define Course Lists, Define Academic Requirements, and Define Requirement Groups.

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

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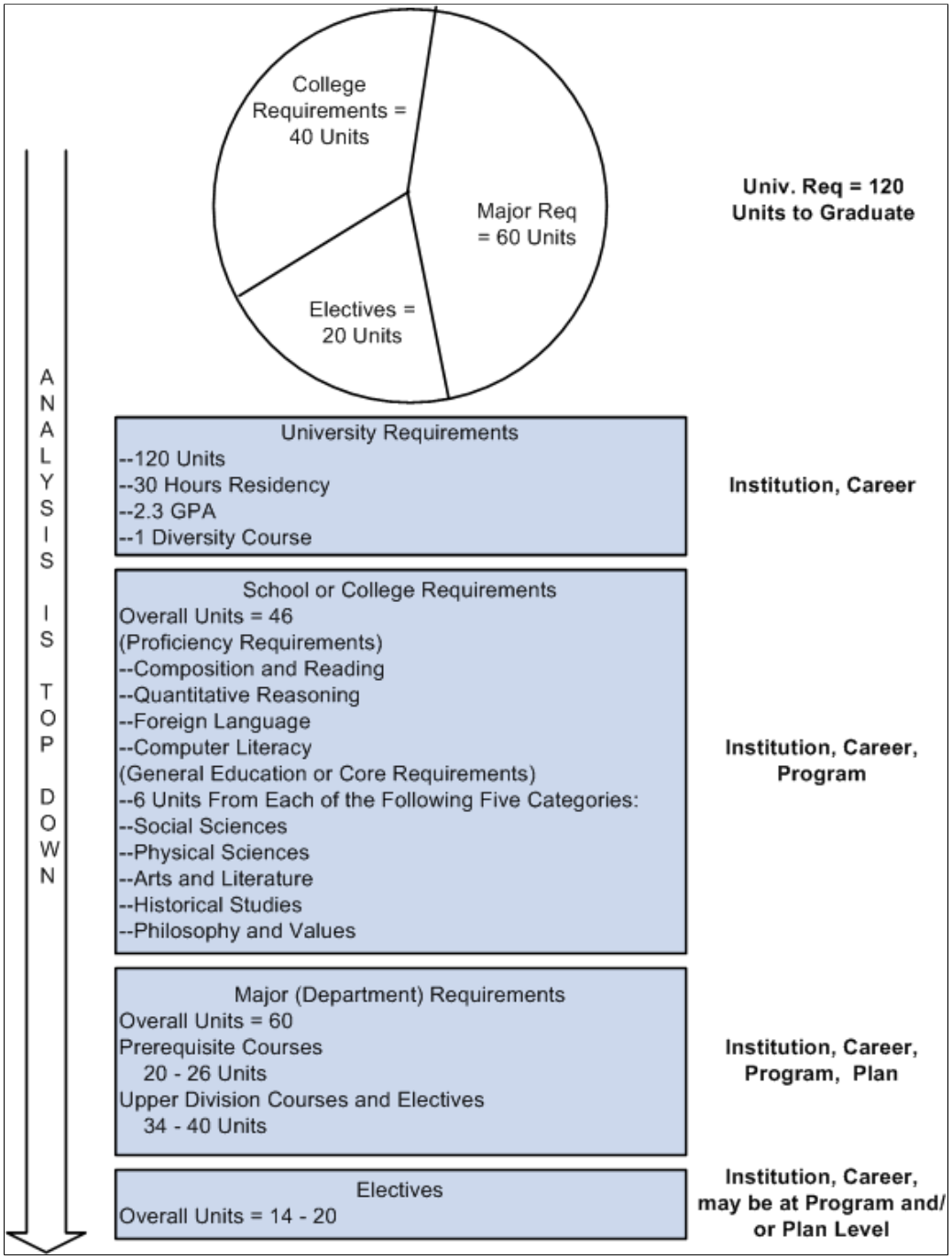
This two-part diagram depicts the traditional approach to academic advisement concepts.



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

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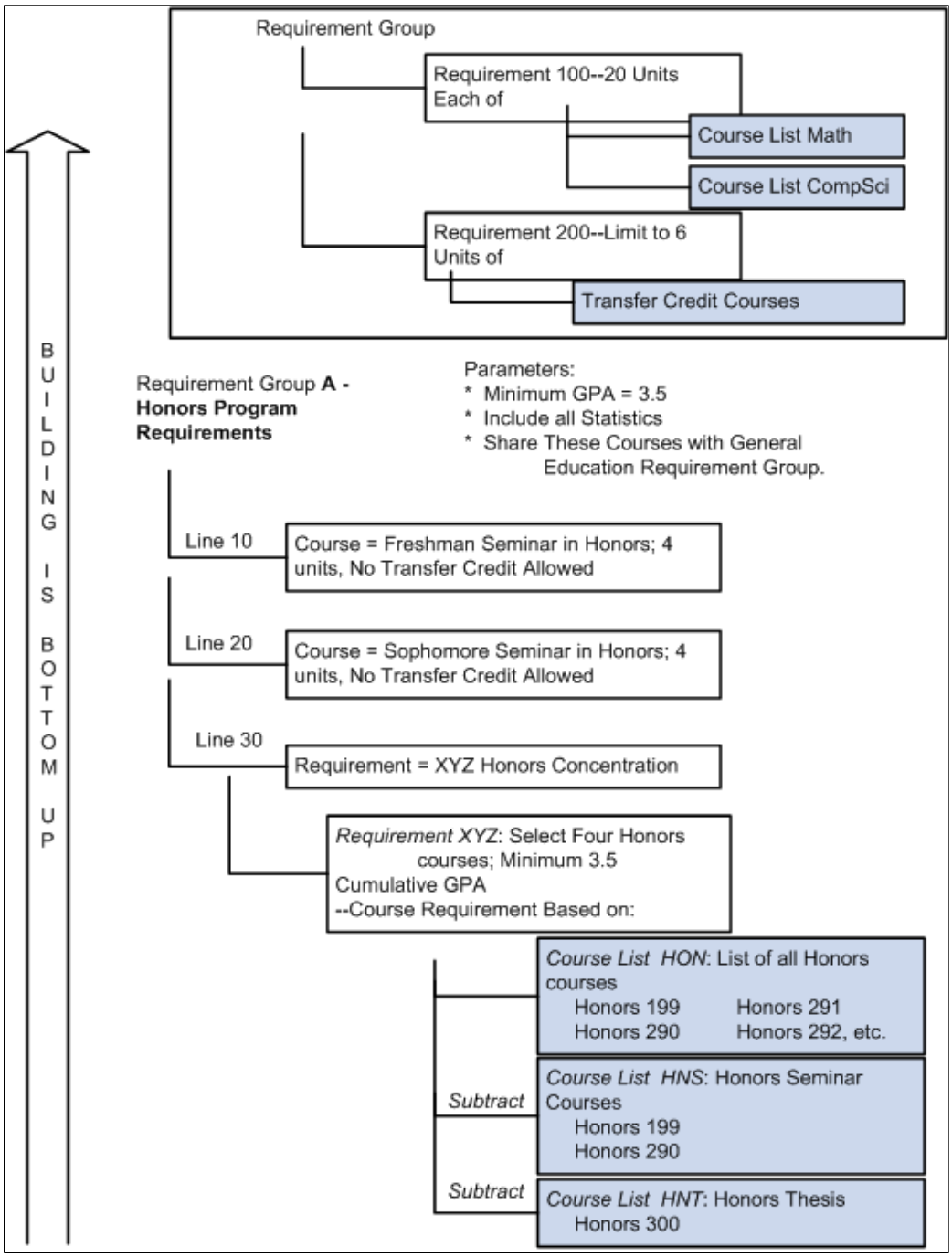
This two-part diagram depicts the traditional approach to academic advisement concepts.



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).

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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.
3	PSUNV	UGRD				Satisfy unit/GPA minimum.	Complete 120 units with a cumulative GPA of 2.000 in those units.

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Row	*Institution*	*Career*	*Program*	*Plan*	*Subplan*	*General Requirement Description*	*Details*
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.
9	PSUNV	GRAD	GLAS	EDMA		Declare a sub-plan.	Point to list of appropriate sub-plans.

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Row	*Institution*	*Career*	*Program*	*Plan*	*Subplan*	*General Requirement Description*	*Details*
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 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 PeopleSoft 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

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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.

Related Links

"Understanding How to Assign Special Grade Point Averages" (Student Records)

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Chapter 3

Setting Up Optional Advisement Data

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.

Related Links

"Defining Grading Schemes" (Student Records)

Setting Up Requirement Line Item Detail

Page Used to Set Up Grade Category Values

Page Name	*Definition 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 *DLST,* then one of the **List Recall Mode** field values is *Grade Category.*

Entering Grade Category Values

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

Access the Grade Category Table page (**Set Up SACR** > **Product Related** > **Student Records** > **Grading** > **Grade Category**).

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.

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Field or Control	*Description*
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.

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Page Used to Set Up Cumulative GPA Values

Page Name	*Definition 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 (**Set Up SACR** > **Product Related** > **Student Records** > **Grading** > **Cum. Grade Point Average**).

Field or Control	*Description*
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 GPA. 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 enter requirement usage values.

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Understanding Special Requirement Usage Values

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

However, in some instances 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.* Perhaps you want to evaluate the GPA of course work in Accounting 1a and Accounting 2a for all pre-business majors to identify those with high grades and to inquire if they are interested in pursuing a degree in the accounting program. You can do either evaluation 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 of 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 four characters (for example, ACCT). The first and last characters cannot be spaces. Usage values that are delivered with the system are three 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, specify the transcript type, which you defined in step 3, on the Request Header page and enter all IDs on the Request Detail page.
   - To run the report for a large group of students by parameters, specify the transcript type, which you defined in step 3, on the Transcript request page and enter the parameters that capture your target population.

Related Links

Setting Up Special Requirement Usage Values

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Setting Up a Requirement Group
"Defining Transcript Type Basic Data" (Student Records)
"Processing Batch Transcripts (Application Engine)" (Student Records)
"Using the XML Transcript Template" (Student Records)

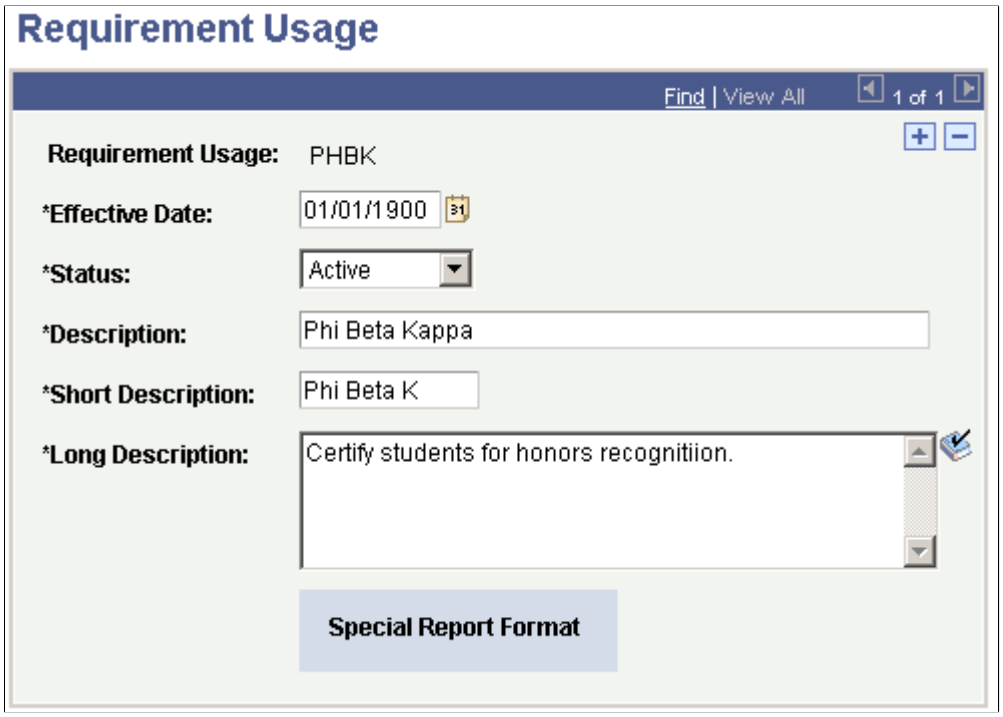
Page Used to Set Up Special Requirement Usage Values

Page Name	*Definition Name*	*Navigation*	*Usage*
Requirement Usage	RQRMNT_USEAGE	**Academic Advisement** > **Academic Requirements** > **Define Requirement Usages**	Create special usage field values for generating alternate report formats.

Entering Requirement Usage Values

Access the Requirement Usage page (**Academic Advisement** > **Academic Requirements** > **Define Requirement Usages**).

This example illustrates the fields and controls on the Requirement Usage page. You can find definitions for the fields and controls later on this 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.

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Field or Control	*Description*
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	Select the status of the requirement usage. Values are: *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. 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.
Description, Short Description, and **Long Description**	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.

Setting Up Valid Student Groups

To set up valid student groups, use the Define Valid Student Groups component (SAA_VALID_STDNT_GR).

You can use student groups in the setup of enrollment requirements (requisites) and degree requirements.

If you generate advisement reports using the Request Advisement Report or Generate Advisement Reports components (SAA_RPT_RQST or SAA_RC_RPTGEN), you can also use student groups as a "trigger" advisement report processing. That is, you can use the addition, deletion, or change to a student's student group record as the basis for generating a new advisement report for a student or group of students.

This section discusses how to set up student groups for use in Academic Advisement.

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Page Used to Define Valid Student Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Valid Student Groups	SAA_VALID_STDNT_GR	**Set Up SACR** > **Product Related** > **Academic Advisement** > **Advising Student Groups**	Enter student groups for use in Academic Advisement and real-time processing.

Defining Valid Student Groups

Access the Define Valid Student Groups page (**Set Up SACR** > **Product Related** > **Academic Advisement** > **Advising Student Groups**).

Field or Control	*Description*
Effective Date	Enter the date for which the student group is effective.
Student Group	Enter the valid student group or groups for the assigned effective date.

Setting Up Report Identifiers

To set up the report identifier, use the Define Report Identifiers component (SAA_RPT_IDENT_TBL).

Report identifiers are used to identify a set of requests to be created, processed, or purged. Four report identifiers are delivered with your system: Administrative Request, Generic Batch, Student Self-Service, and Trigger Process. You should not change these values but can add others as needed.

This section discusses how to define the report identifier.

Page Used to Set Up a Report Identifier

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Report Identifier	SAA_RPT_IDENT_TBL	**Academic Advisement** > **Academic Requirements** > **Define Report Identifier**	Enter the report identifier for a set of requests to be created, processed, or purged.

Defining the Report Identifier

Access the Define Report Identifier page (**Academic Advisement** > **Academic Requirements** > **Define Report Identifier**).

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Field or Control	*Description*
Effective Date	Enter an effective date to define when the status that you select is valid.
Status	Select the status of the report identifier. Values are. *Active:* Select when adding a new report identifier. *Inactive:*Select only if your institution will no longer use this report identifier. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values will require a substantial programming effort.
Description and**Long Description**	Enter a description of the report identifier that is meaningful as a search key. This description appears in search results for report identifiers. The long description is the internal description of the report identifier; it is for your institution's reference.

See Producing Academic Advisement Reports.

See Purging Academic Advisement Reports.

Defining Default Course What-If Grades

To set up the course what-if default grade, use the Grading Scheme Table component (GRADING_SCHEME_TBL).

If you have defined a default course what-if grade for a particular grade basis and you do not assign a course grade when setting up a course what-if scenario for a student, the default grade is used in the degree audit when you generate an advisement report using the Request Advisement Report and Generate Advisement Reports components. However, the grade does not appear on the report. The **Default AA What If Grade** field value is also used for planned, in-progress, and shopping cart courses. If present, the repeat checking process can be run during the degree audit. If no default grade is defined, the degree audit assumes successful completion of the course for purposes of satisfying a degree requirement, but it does not perform repeat checking. If, however, an administrator enters a grade when setting up a what-if course on the Report Request page, that grade will appear on the advisement report. Similarly, if an individual using the What-If Report - Create What-if Scenario (SAA_SS_WHATIF) self-service page enters a grade for a what-if course, the grade will be used for repeat checking and the what-if grade will also appear on the advisement report.

See "Setting Up Your System for Grading" (Student Records) .

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Setting Up Tests for Use in Academic Advisement

This section discusses how to set up valid tests for use in preconditions and conditions in Academic Advisement.

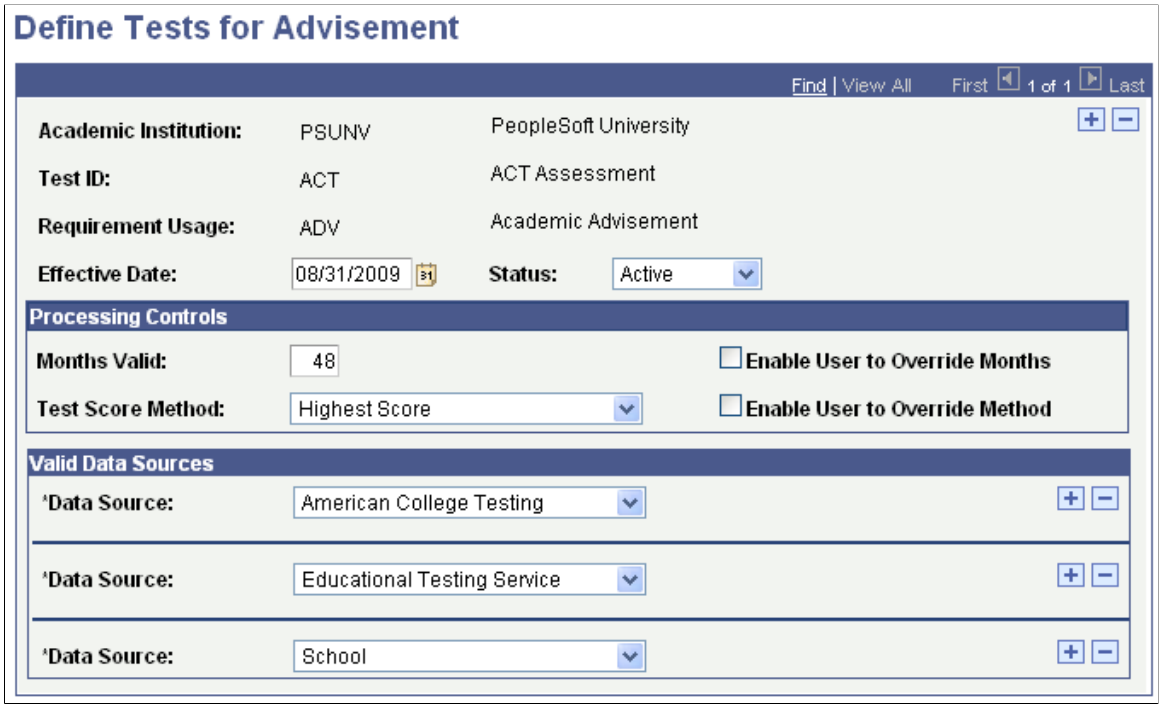
Page Used to Set Up Tests for Use in Academic Advisement

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Tests for Advisement	SAA_COND_TEST	**Set Up SACR** > **Product Related** > **Academic Advisement** > **Define Tests for Advisement**	Set up test information for use in preconditions and conditions in academic requirements and academic requirement groups.

Defining Tests for Use in Academic Advisement

Access the Define Tests for Advisement page (**Set Up SACR** > **Product Related** > **Academic Advisement** > **Define Tests for Advisement**).

This example illustrates the fields and controls on the Define Tests for Advisement page. You can find definitions for the fields and controls later on this page.



Use this page to identify the tests and related data that you want to use in preconditions and conditions in academic requirements and academic requirement groups. The Test IDs will have already been defined in the Test Tables component so you are not defining Test IDs here. Rather, you are identifying which Test IDs you want to use in academic advisement. The key structure of the setup table contains the requirement usage so that it enables you to set define the valid tests for each requirement usage.

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Important! You can also use test scores in enrollment requisites. To do so, you must first define your test IDs and related data in the Define Tests for Requisites component.

See"Defining Tests for Use in Requisites" (Student Records) .

Field or Control	*Description*
Test ID	Select the Test ID (ACT, GMAT, GRE for example) that you want to use in Advisement. This field prompts on the values previously defined in the Test Tables component. This field is unavailable for entry unless you are in Add mode.
Requirement Usage	Select the value that specifies how this requirement is applied. This field is unavailable for entry unless you are in Add mode.
Status	Select the status of the report identifier. Values are: *Active:* Select when adding a new report identifier. *Inactive:* Select only if your institution will no longer use this report identifier. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values will require a substantial programming effort.
Months Valid	Enter the number of months for which a test score can be considered valid. An empty (blank) field is interpreted to mean that the test is always valid.

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Field or Control	*Description*
Test Score Method	Select a default value to be used when you use this test ID in preconditions and conditions. (On this same page, you can enable users to override this default value when the field appears in the Academic Requirement Group, Academic Requirement, , or Define Dynamic Condition components.) Values are: *Average of All Scores Taken:* Select to have the advisement engine average scores for a given test when it processes the test for a precondition or condition in an academic requirement or requirement group. *First Test Taken*: Select to have the advisement engine use the test score with the earliest date when it processes the test for a precondition or condition in an academic requirement or requirement group. *Highest Score*: Select to have the advisement engine use the highest score for a given test when it processes the test for a precondition or condition in an academic requirement or requirement group. *Last Test Taken*: Select to have the advisement engine use the score from the date of the last test taken when it processes the test for a precondition or condition in an academic requirement or requirement group. *Lowest Score*: Select to have the advisement engine use the lowest score for a given test when it processes the test for a precondition or condition in an academic requirement or requirement group.
Enable User to Override Method	Select this check box if you want to enable a user to change the **Test Score Method** field value when setting up a precondition or condition in the Academic Requirement Group, Academic Requirement, , or Define Dynamic Condition components. This check box label is defined in the Message Catalog. You may change this label as needed.
Enable User to Override Months	Select this check box if you want to enable a user to change the **Test Score Method** field value when setting up a precondition or condition in the Academic Requirement Group, Academic Requirement, , or Define Dynamic Condition components. This check box label is defined in the Message Catalog. You may change this label as needed.
Data Source	Select one or more valid data sources (American College Testing, for example) for the **Test ID** you are defining. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered testing agency values that appear here are American College Testing, College Board, Educational Testing Services, and Law School Admission Services. These are the data sources that the audit engine will consider as valid when processing a test score in an academic requirement or requirement group.

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Related Links

"Defining External Test Components" (Recruiting and Admissions)
"Defining External Tests" (Recruiting and Admissions)
Setting Up Academic Requirements
Setting Up Academic Requirement Groups

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Chapter 4

Setting Up Academic Course Lists

Understanding Academic Course Lists

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

You specify courses either by a unique course ID or by a wildcard indicator. For example, you can insert a row with the course ID for English 62, or you can 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. To increase efficiency, you can use a wide ranging wildcard followed by set operation theory to subtract smaller pieces. For example, you might establish undergraduate courses as 100-level through 400-level courses, and graduate courses as 500-level courses. Then, rather than use a course list with four course sequences of *1##, 2##, 3##,* and *4##,* it would be more efficient to use the wildcard course list at the subject level, or even the academic group level, and 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 but five of the courses in a subject are valid to be used, then using a wildcard course list at the subject level and subtracting a course list of five courses is more efficient than establishing a course list that details all of the valid course IDs.

See Creating a Course List Detail.

Setting Up Academic Course Lists

This section provides an overview of how to create an academic course list and discusses how to:

- Set up a course list description.
- Create a course list detail.

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- Establish course list parameters.

Understanding How to Create an Academic Course List

Complete these steps 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 about 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.

When inserting a new effective-dated row to a course list, the user must first go to the Course List Detail page and fetch the course list details. Otherwise, the new row is created without course detail. The user receives a warning upon inserting the new row.

This change applies to academic, enrollment, and Program Guide course lists and occurs when the user is in an action mode other than *Add.*

Additionally, the effective date on a course list can not be changed in correction mode unless the course list details are retrieved first. When entering the page, the **Effective Date** field is disabled until the details have been fetched. After the user retrieves the course detail, the user can change the effective date.

Pages Used to Create an Academic Course List

Page Name	*Definition Name*	*Navigation*	*Usage*
Course List Description	RQ_COURSE_LIST	**Academic Advisement** > **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 Advisement** > **Academic Requirements** > **Define Course Lists** > **Course List Detail**	Establish which courses comprise the course list.
Course List Parameters	RQ_CRSE_LST_DPRM	**Academic Advisement** > **Academic Requirements** > **Define Course Lists** > **Course List Parameters**	Establish detail parameters for each course in the course list.

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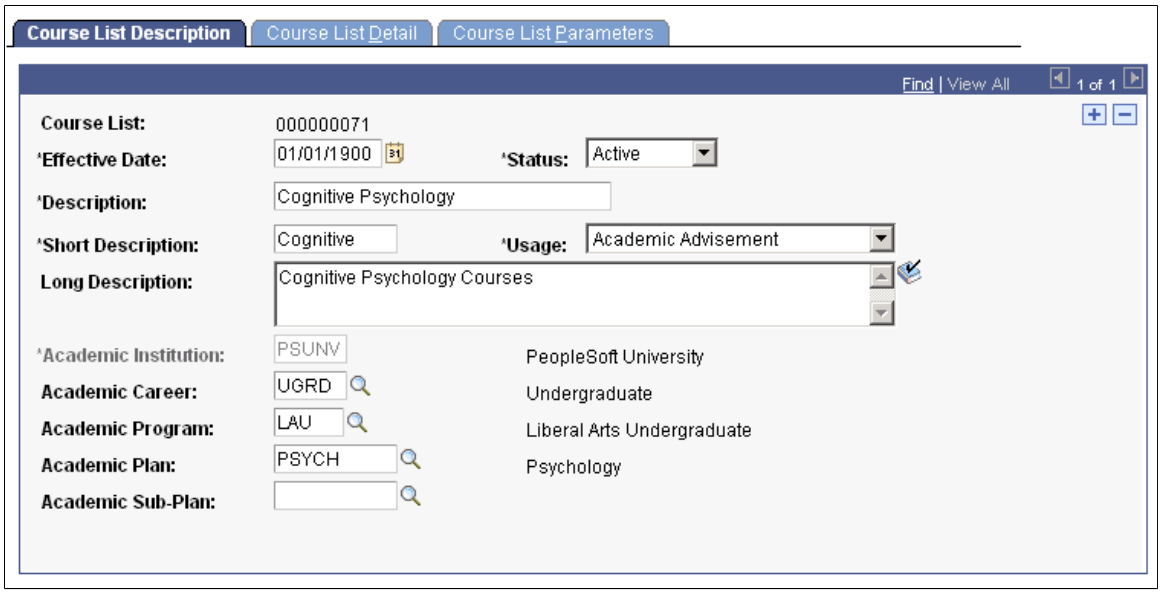
Setting Up a Course List Description

Access the Course List Description page (**Academic Advisement** > **Academic Requirements** > **Define Course Lists** > **Course List Description**).

This example illustrates the fields and controls on the Course List Description page. You can find definitions for the fields and controls later on this page.



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Field or Control	*Description*
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 a requirement group defined at a program level to a student. The requirement group has two effective-dated rows: 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: 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 is 01/01/1990.

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Field or Control	*Description*
Copy	This button appears on this page in Add mode only. You can copy course lists with a usage value of *Academic Advisement* or *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:* Select to copy only the last effective-dated record. This value is the default. *None:* If selected, this value 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. After selecting the copy mode, click the *OK* button 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.

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Field or Control	*Description*
Usage	Select the value that indicates how the data in this course list is used. Values are: *Academic Advisement:* Select to use the data recorded on this page during the degree audit process. This value is the default. *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 (**Curriculum Management** > **Enrollment Requirements** >**Enrollment Course Lists** > **Course List Detail**).

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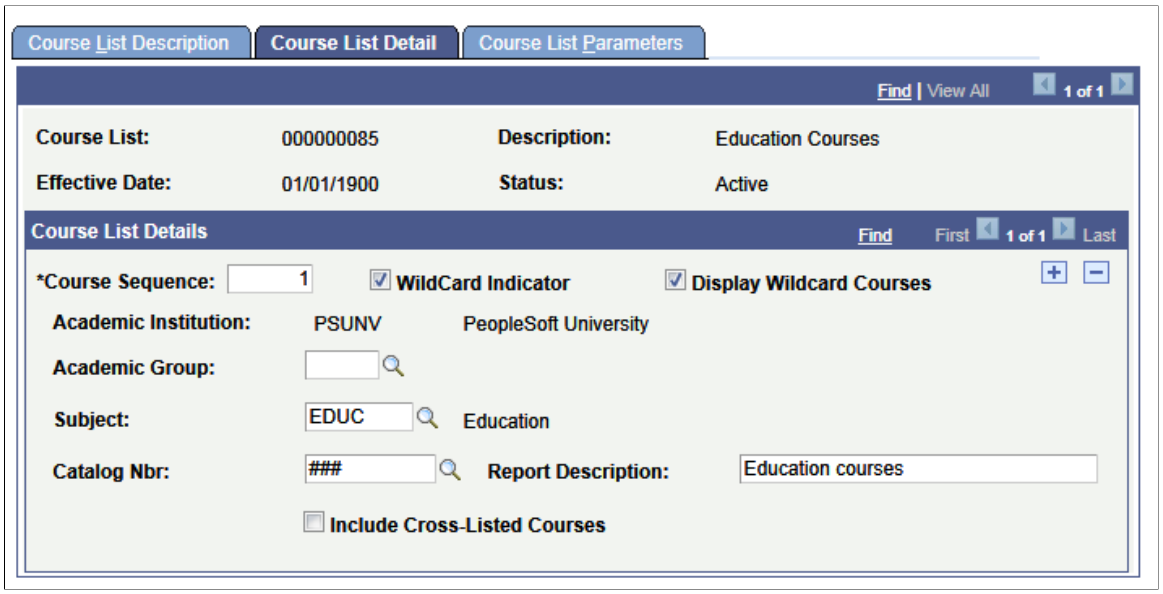
This example illustrates the fields and controls on the Course List Detail page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Fetch	Click 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 ID that specifies the course needed to satisfy this course list. (Prompt on this field and enter search criteria to narrow the 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.

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Field or Control	*Description*
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 **Term, Associated Class,** and **Topic ID**fields become unavailable If you select this 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 for 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 "Creating Course Equivalency Groups" (Student Records).
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 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 "Defining Class Associations" (Student Records).
Topic ID	Enter the topic ID, of the course that you specify, that the student must take 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 "Defining Course Catalog Data" (Student Records).
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. **Note:** When this check box is selected, the remainder of the fields discussed in this section are available.

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Field or Control	*Description*
Display Wildcard Courses	Select to specify that a link appears below the course name in the course grid on the My Academic Requirements page. If this check box is cleared, then the wildcard course (subject and catalog number) appears in the course grid on the My Academic Requirements page but is not linked. **Note:** Note that this check box is available only when the **WildCard Indicator** check box is selected, and it applies only to advisement report based on advisement report types (not those based on transcript types).
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 name of 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 four characters are numeric (leading zeroes are blank-padded) and the last six 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 numerical wildcard 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 wildcard in any position in the field. When you use wildcards, the system does not check equivalent courses. (This is an efficiency constraint.) **Note:** The **Catalog Nbr** field does not support ranges of numbers. However, you can establish multiple detail lines. For example, in one detail line you can use a wildcard for 100-level courses, and in a second detail line you can use a wildcard for all 200-level courses. Use the pound sign (#) to represent the first four numeric values, and use the asterisk (*) to represent the last six 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 one alphanumeric character.

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Field or Control	*Description*
Report Description	Enter a description that you want to display in the **Description** field of the course grid on the My Academic Requirements page. The report description also appears on the .pdf advisement report under available courses. If the field is left blank, then message catalog text, View Course Details, appears in the **Description** field on the course grid on the My Academic Requirements page. On the .pdf report, the subject and catalog number appear under courses available (if applicable). **Note:** This field is only for use if your institution generates advisement reports based on advisement report types (not transcript types).
Include Cross-Listed Courses	The check box is available when the **WildCard Indicator** check box is selected. By default, the check box is cleared. Select the **Include Cross-Listed Courses** check box for the audit engine to evaluate cross-listed courses for the purpose of satisfying the requirement line pointing to the wildcard course. For example, Course ID 123456 has cross-listed courses of Math 100 and Bus 120 offered by the Math department in the School of Letters, Arts and Sciences and the School of Business respectively. If the check box is selected, and the student has taken the business offering (Bus 120), the audit engine can use the Bus 120 class to comply with the academic requirement of taking a course from the wildcard course list.

This table lists the results of how the system processes wildcard values:

Catalog Number	*Results*
#	The search retrieves all courses with a single-digit catalog number and any number of alphanumeric characters (letters) following 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 this value is preceded by four blank spaces, which are represented by *NNNN*.
#*	The search retrieves all courses with one digit followed by one alphanumeric character.
###	The search retrieves all catalog numbers up to three digits, including any characters that follow the numbers.

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Catalog Number	*Results*
##W	The search retrieves all one- and two-digit catalog numbers that are followed only by the character *W*.
1##***	The search retrieves 100-level catalog numbers, including none, one, two, and three alphanumeric characters. The search will not, however, retrieve a four-digit alphanumeric character.

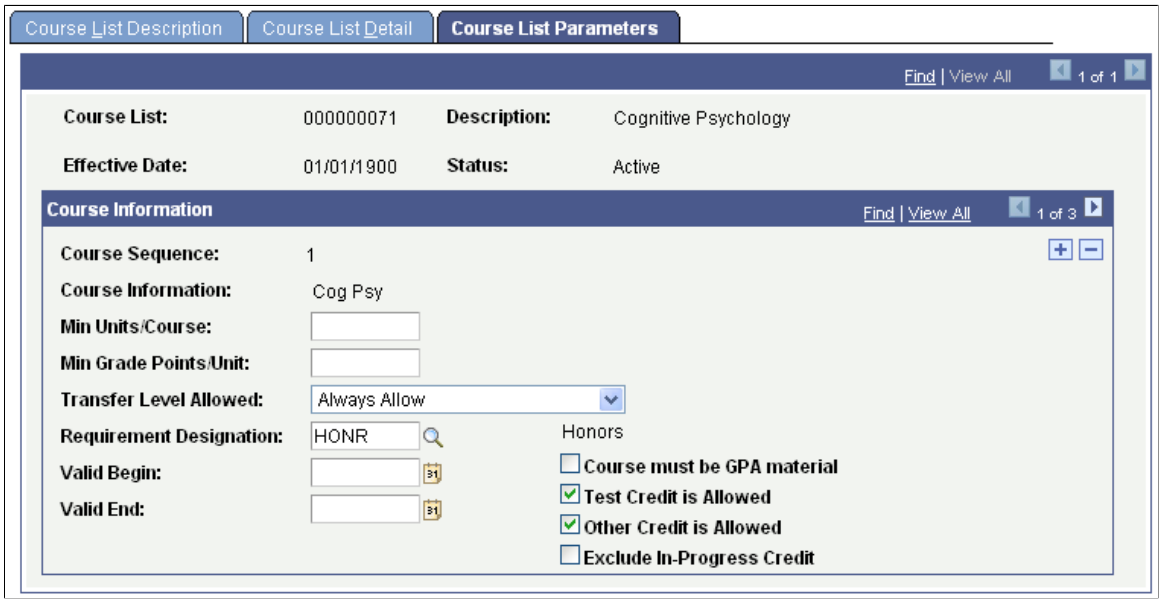
You cannot place alphabetic characters before numeric characters. The format must be NNNNAAAAAA, where *N* represents a numeric character and *A* represents an alphanumeric character. Specifically, four numeric characters must precede all alphabetic characters.

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 (**Academic Advisement** > **Academic Requirements** > **Define Course Lists** > **Course List Parameters).**).

This example illustrates the fields and controls on the Course List Parameters page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Course Sequence	Appears by default from the Course List Detail page.

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Field or Control	*Description*
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 per 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 per unit)	Enter the minimum number of grade points per unit that this course must be worth to be considered valid. This value overrides the minimum grade points per course defined for the requirement on the Line Item Parameters page.
Transfer Level Allowed	Select the type of transfer credit, if any, that is acceptable. Values are: *Always Allow:* Select to specify that all applicable transfer credit can be used to satisfy the requirement. This value is the default. *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:* When selected, this value 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 "Setting Up School Types" (Recruiting and Admissions). See "Defining External Organizations" (Student Records).

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Field or Control	*Description*
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 "Defining Requirement Designations" (Student Records).
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 GPA calculation. The course cannot be taken on a pass/no pass or audit basis; it must be taken for a grade. The default is cleared. **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 "Defining Grading Schemes" (Student Records).
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.

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Field or Control	*Description*
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 cleared.

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 six 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.

Next, 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.

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.

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Chapter 5

Setting Up Academic Requirements

Understanding Academic Requirements

Academic requirements are graduation rules; that is, rules that the students must follow to successfully complete their academic objectives. Academic requirements include requirement parameters, preconditions, connector types, partitions, detail requisites or restrictions, and line item parameters. Requirements can be simple (for example, a minimum grade point average [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 runtimes, 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.

Related Links

Setting Up Academic Course Lists

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Common Elements Used in Academic Requirements

Field or Control	*Description*
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 only for this requirement. *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.
Search Description, Short Search Description, Description, and **Long Description**	Enter a search 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 search description, which appears on this page only unless you opt to print it on a requirement advisement report (SRRQRADV). Enter a long description that you can print on the advisement transcript. For example, on the Parameters page, the **Print Control** value selected affects whether the long description and required parameters are printed on the advisement transcript.
Minimum Units	Enter the minimum total units that are required to satisfy the line number that appears or to satisfy the course requirement.

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Pages Used to Set Up Academic Requirements

Page Name	*Definition Name*	*Navigation*	*Usage*
Requirement	ADVIS_REQUIREMENT	**Academic Advisement** > **Academic Requirements** > **Define Academic Requirements** > **Requirement**	Establish the institution, career, program, plan, subplan, and precondition information for a new academic requirement.
Parameters	ADVIS_RQRMNT_PARM	**Academic Advisement** > **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 Advisement** > **Academic Requirements** > **Define Academic Requirements** > **Line Item**	Create a requirement line item.
Line Item Parameters	ADVIS_RQ_LINE_PARM	**Academic Advisement** > **Academic Requirements** > **Define Academic Requirements** > **Line Item Parameters**	Establish requirement line item parameters. Indicate additional controls for requirement line items.
Line Item Detail	ADVIS_RQ_LN_DETAIL	**Academic Advisement** > **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 (**Academic Advisement** > **Academic Requirements** > **Define Academic Requirements** > **Requirement**).

Basic Data

Field or Control	*Description*
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.

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Field or Control	*Description*
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 from these values: *Copy last record:* Select to copy only the last effective-dated record. This value is the default. *None:* This value 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. After you select a value in the **Copy Mode** field, click OK to copy the specified requirement. 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.

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Field or Control	*Description*
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	Select the status of the academic requirement. Values are: *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.

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Field or Control	*Description*
Requirement 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 Student Records. *Student Individualized Plan:* Select to have the system use the data that is recorded on this page as an override, which is set up using 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 only one line type is available: *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 Structure

Field or Control	*Description*
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.

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Description Fields

Field or Control	*Description*
Report Description	Enter a short but meaningful report description. This description is only used only on My Academic Requirements and its corresponding pdf report. That is, it appears only on advisement reports based on advisement report types (not transcript types) and created using either the SAA_RPT_RQST or SAA_RC_RPTRQST components.
Report Long Description	Enter a meaningful long description. This description appears only on My Academic Requirements and its corresponding pdf report. That is, it appears only on advisement reports based on advisement report types (not transcript types) using either the SAA_RPT_RQST or SAA_RC_RPTRQST components.

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Field or Control	*Description*
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:* Select to set no precondition. This is the default. *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.

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Field or Control	*Description*
	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. *Test Score:* Select to specify a test score. Upon selecting this value, the following fields become available according to the setup on the Define Tests for Advisement page: **Test ID, Test Component, Condition Operator, Test Score, Months Valid,** and **Test Score Method.** *Dynamic Condition:* If the precondition is Dynamic Condition, operators are not used and you select a dynamic condition from the Define Dynamic Condition component. The field prompts on dynamic conditions whose requirement usage value matches that of the requirement.

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Display of Status

Field or Control	*Description*
Hide Status	This check box is for use with informational-only type of requirements--where the requirement setup is such that it does not make sense to display on the advisement report the status of *Satisfied* or *Not Satisfied.* Select the check box if you do not want the status *(Satisfied* or *Not Satisfied)* to appear on the advisement report next to the requirement. **Note:** The option to hide the status also exists for the requirement group and requirement line.

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.

Related Links

Defining Expanded Conditions
"Maintaining Student Program Stacks" (Student Records)
Understanding Academic Advisement Concepts
Setting Up Special Requirement Usage Values

Specifying Requirement Parameters

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.

Access the Parameters page (**Academic Advisement** > **Academic Requirements** > **Define Academic Requirements** > **Line Item Parameters**).

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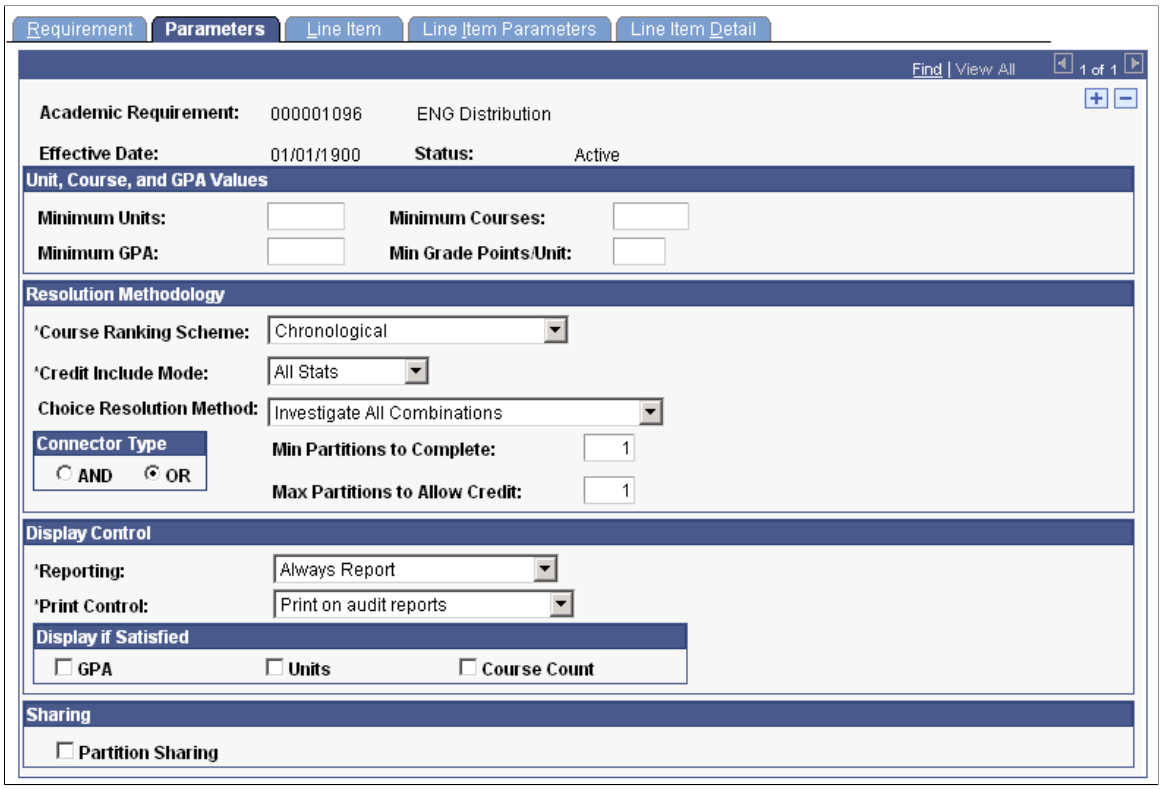
This example illustrates the fields and controls on the Parameters page. You can find definitions for the fields and controls later on this page.



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.

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Unit, Course, and GPA Values

Field or Control	*Description*
Minimum GPA (minimum grade point average)	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.
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.
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. The system uses this value as the default value for each detail line, where you can override it.

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Resolution Methodology

Field or Control	*Description*
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.

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Field or Control	*Description*
Choice Resolution Method	Select the preferred method of analyzing the selection of courses in multiple partitions in an AND or an 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.

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Field or Control	*Description*
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.
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.

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Field or Control	*Description*
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.

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Display Control

Field or Control	*Description*
Reporting	The Reporting field values *Report Only When Satisfied* and *Report Only When Not Satisfied* suggest that only display of data is suppressed. However, the selection of a Reporting field value other than *Always Report* changes the processing logic for the requirement. The audit engine checks the Reporting field value after all other processing is completed. The requirement's status (Satisfied or Not Satisfied) is compared against the Reporting field value *(Report if Satisfied* or *Report if Not Satisfied).* If the values do not agree (that is, both are satisfied or both are unsatisfied), the requirement and all requirement lines attached to the requirement are deleted from the report results. Consequently, the requirement will not appear on the report. *Always Report:* Select to always report the requirement, regardless of the completion status. **Note:** To ensure consistent results, use the Reporting field value of *Always Report.* *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. Use the Credit Include Mode of *Verify* when using *Report Only When Not Satisfied* to avoid reports that will not be consistent after the requirement is satisfied. If the Credit Include Mode is *All Stats,* the audit will not capture courses or calculate statistics for the courses used in the requirement after the requirement is satisfied. Not capturing the courses prevents course and statistical information for those non-displayed courses from rolling up into the requirement group attached to the requirement. If the course were captured, the report results would be confusing because it would not be apparent why the course is not used elsewhere in the audit. *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. This value should only be used when it is appropriate to display a message in the report when the requirement is

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Field or Control	*Description*
	satisfied and the status of the requirement has no bearing on the status of the requirement group. The process will not pass a Not Satisfied value to the requirement group for the particular requirement if the requirement is set to *Report Only When Satisfied* and the requirement is not satisfied. If it did, the report would be confusing because all requirements of the requirement group might be satisfied except the requirement not displayed. Because there is no display of the failed requirement, the process will treat the non-displayed requirement as satisfied. 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	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. Values are: *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.

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Display If Satisfied

Field or Control	*Description*
GPA (grade point average)	If this check box is cleared, the report displays the GPA value based on the print control matrix in the product documentation. **Note:** Previously, if a GPA were required, the actual GPA would display if a processing level were satisfied. This functionality will not change, even if this check box is cleared. If this check box is selected and a minimum GPA is entered, the report displays the required GPA and the calculated GPA for the specific processing level if it is satisfied. If this check box is selected and no minimum GPA is entered, the report displays the calculated GPA for the specific processing level if it is satisfied.
Units	If this check box is cleared, the report displays the appropriate units values based on the print control matrix in the product documentation. If this check box is selected and minimum units are entered, the report displays the required units and the calculated units for the specific processing level if it is satisfied. If this check box is selected and no minimum units are entered, the report displays the calculated units for the specific processing level if it is satisfied.
Course Count	If this check box is cleared, the report displays the appropriate course count values based on the print control matrix in the product documentation. If this check box is selected and a minimum course count is entered, the report displays the required course count and the calculated course count for the specific processing level if it is satisfied. If this check box is selected and no minimum course count is entered, the report displays the calculated course count for the specific processing level if it is satisfied.

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Sharing

Field or Control	*Description*
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.

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.

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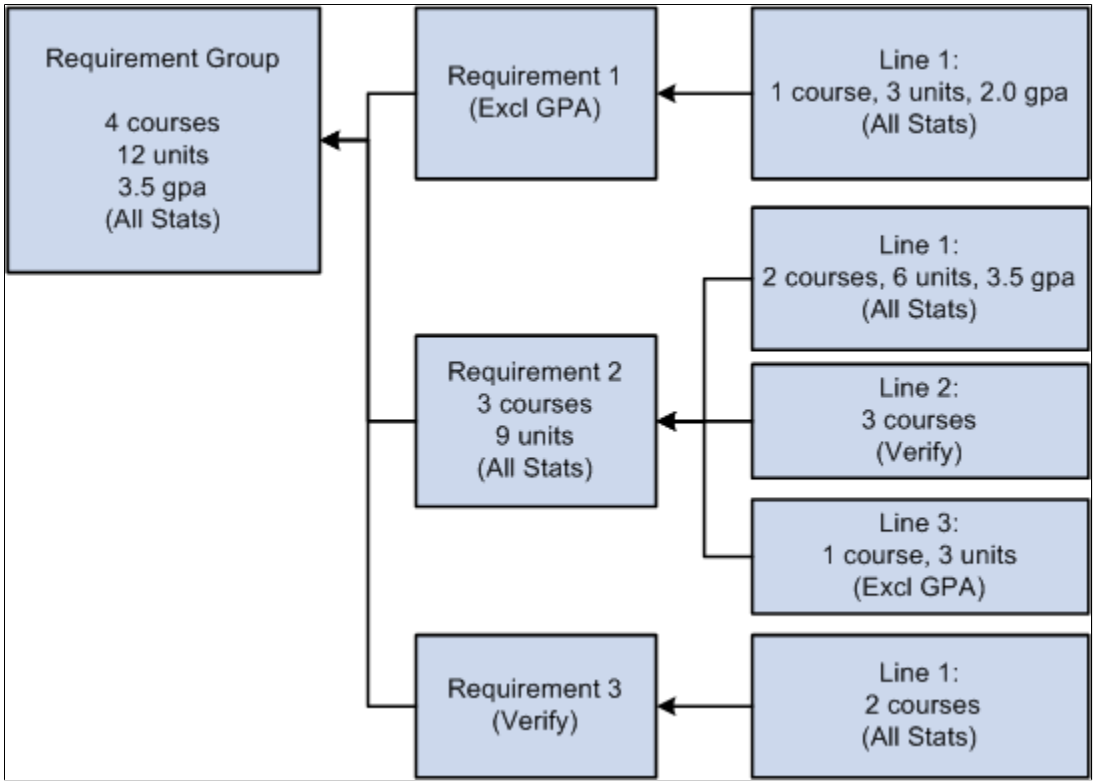
The diagram shows how requirements contribute to parameters according to the assigned Credit Include Mode value at each level.



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.

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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

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Requirement	*Satisfy in Sequential Order*	*Investigate All Combinations*
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).

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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.

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- 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).

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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.

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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
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

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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	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
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

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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	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
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

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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	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
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

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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	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
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

Related Links

Setting Up Requirement Line Item Detail

Creating a Requirement Line Item

Access the Line Item page (**Academic Advisement** > **Academic Requirements** > **Define Academic Requirements** > **Line Item**).

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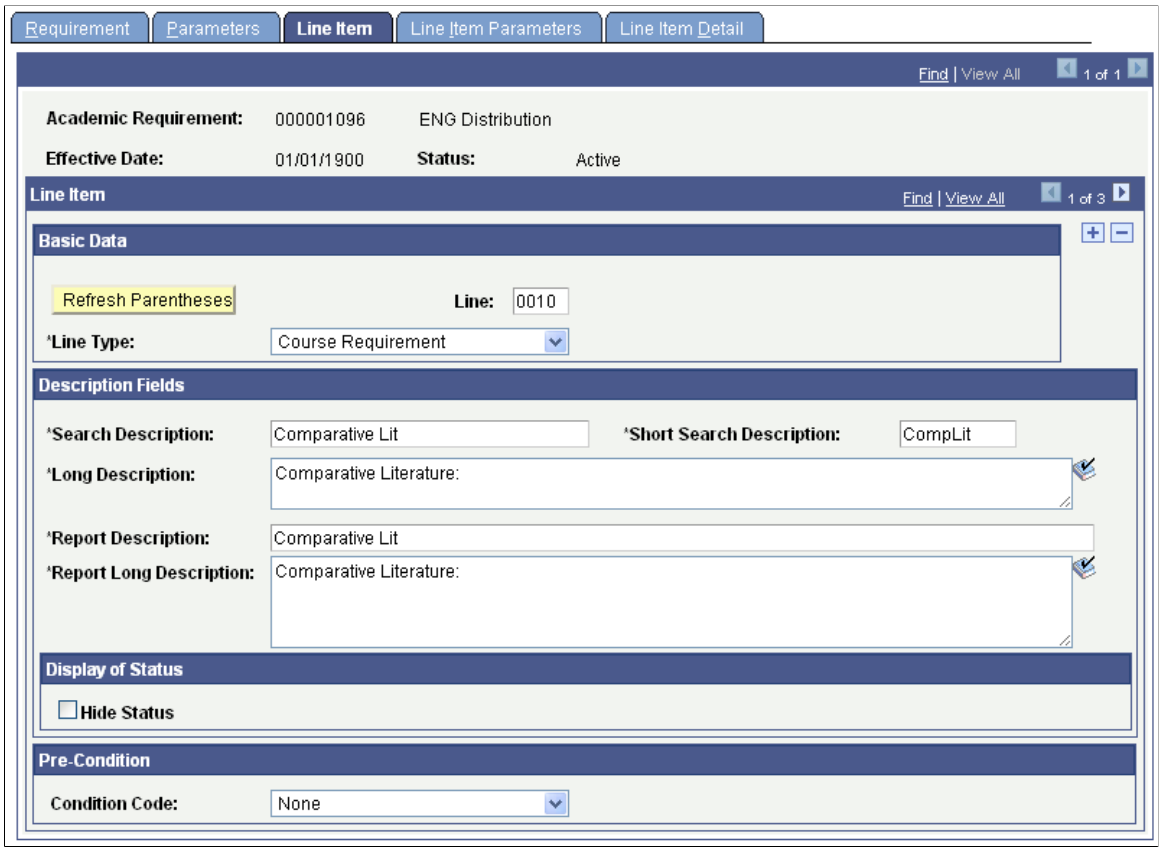
This example illustrates the fields and controls on the Line Item page. You can find definitions for the fields and controls later on this page.



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 for 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.

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Basic Data

Field or Control	*Description*
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.

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Field or Control	*Description*
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 cleared and any conditions that are stated on the Line Item Detail page are false, then false is recorded. For example, if the condition requires a cumulative GPA of greater than 3.5, and the student has a GPA of 3.0, then 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 less than 3.5). --- **Note:** The words "True" and "False" appear on the advisement transcript. The interactive advisement report and .pdf file display the words "Satisfied" and "Not Satisfied." --- *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

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Field or Control	*Description*
	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 Setting Up a Global Sequential Restriction Requirement and Setting Up a Local Sequential Restriction Requirement. **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.

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Field or Control	*Description*
	Specified Courses: Select to specify a course list from which the student must take at least 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. 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. The Specified Courses line type is intended to be used when the user requires the student to take *multiple* iterations of *each* course on the course list. For example, if the minimum courses value is 3, then the student must complete three enrollments of *each* course on the associated course list. The recommendation is that institutions create requirements using the least complex setup in terms of processing logic. Specified Courses functionality processing logic can be complex and can have unintended impacts if users have defined requirement level parameters. If the goal is to require the student to take just one of each of the courses on the associated course list, your institution can alternatively set up a Course Requirement line type and specify one course or the minimum units that represents one course. The user can use the report long description fields to explain what is required and can use the print control settings to display the description and parameters as appropriate. *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.

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Field or Control	*Description*
	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.

Description Fields

Field or Control	*Description*
Report Description and **Report Long Description**	Enter a description and a long description that you want to appear on the advisement report. This report is generated using the Request Advisement Report or Generate Advisement Reports components. Use the long description to further explain the requirement.

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Field or Control	*Description*
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 *Less or Equal, Greater or Equal, Equal, Greater Than, Less Than, Not Equal, In,* 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 runtime. *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

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Field or Control	Description
	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 runtime. *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 students 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].)

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Field or Control	Description
	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. *Test Score:* Select to specify a test score. Upon selecting this value, the following fields become available according to the setup on the Define Tests for Advisement page: **Test ID, Test Component, Condition Operator, Test Score, Months Valid,** and **Test Score Method.** *Dynamic Condition:* If the precondition is Dynamic Condition, operators are not used and you select a dynamic condition from the Define Dynamic Condition component. You prompt on dynamic conditions whose requirement usage value matches that of the 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.

Display of Status

Field or Control	Description
Hide Status	This check box is for use with informational-only type of requirement lines --where the requirement line setup is such that it does not make sense to display on the advisement report the status of *Satisfied* or *Not Satisfied.* Select the check box if you do not want the status *(Satisfied* or *Not Satisfied)* to appear on the advisement report next to the requirement. **Note:** The option to hide the status also exists for the requirement group and requirement.

Related Links

Understanding Academic Advisement Concepts
Setting Up Cumulative GPA Values
Setting Up Grade Category Values
Setting Up Special Requirement Usage Values
Setting Up Valid Student Groups
Setting Up Tests for Use in Academic Advisement
Setting Up Report Identifiers

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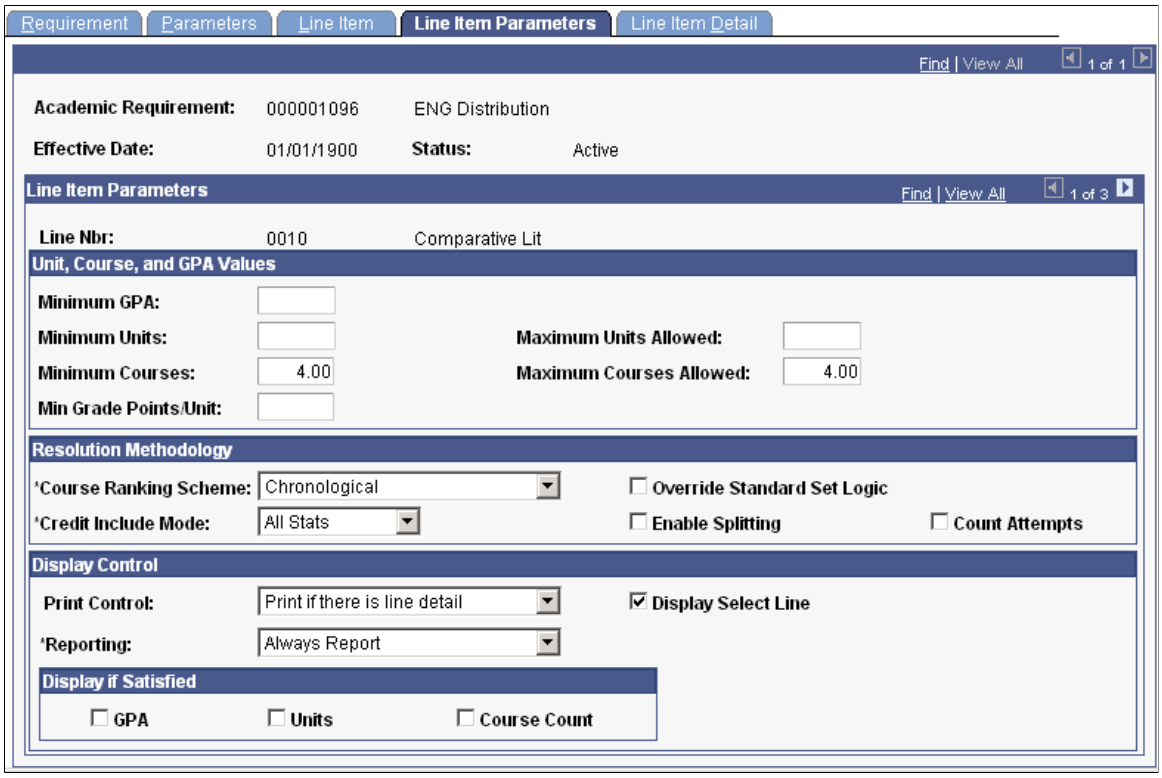
Specifying Requirement Line Item Parameters

Access the Line Item Parameters page (**Academic Advisement** > **Academic Requirements** > **Define Academic Requirements** > **Line Item Parameters**).

This example illustrates the fields and controls on the Line Item Parameters page. You can find definitions for the fields and controls later on this 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.

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

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Requirement Line Item - Line Type	*Elements That Appear*
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
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.

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Unit, Course, and GPA Values

Field or Control	*Description*
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(minimum grade point average)	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 (maximum grade point average)	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.

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Field or Control	*Description*
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.

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Field or Control	*Description*
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.

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Field or Control	*Description*
Reporting	The Reporting field values *Report Only When Satisfied* and *Report Only When Not Satisfied* suggest that only display of data is suppressed. However, the selection of a Reporting field value other than *Always Report* changes the processing logic for the requirement line. The audit engine checks the Reporting field value after all other processing is completed. The requirement line status (Satisfied or Not Satisfied) is compared against the Reporting field value *(Report if Satisfied* or *Report if Not Satisfied)*. If the values do not agree (that is, both are satisfied or both are unsatisfied), the requirement line is deleted from the report results. Consequently, the requirement line will not appear on the report. *Always Report:* Select to always report the requirement line, regardless of the completion status. **Note:** To ensure consistent results, use the Reporting field value of *Always Report.* *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. Use this reporting value only when it is appropriate to display a message in the report when the requirement line is not satisfied and the status of the requirement line has no bearing of the status of the requirement. To avoid reports that will not be consistent when the requirement line is satisfied, use this reporting value with the Credit Include Mode of *Verify.* If the Credit Include Mode is *All Stats,* the process will not capture courses or calculate statistics for the courses used in the requirement line after the requirement line is satisfied. This is done to prevent the course and statistical information for the non-displayed courses from rolling up into the requirement or requirement group where the requirement line exists. If the course were captured, the report results would be confusing because it would not be apparent why the course is not used elsewhere in the report. *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. Select this value when the requirement will be satisfied upon satisfaction of the requirement line.

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Field or Control	*Description*
	If the requirement line is not satisfied, the requirement line results will be deleted and the requirement line and all associated results will not be displayed in the report. The process will not pass a Not Satisfied value to the requirement. If it did, the report would be confusing because all requirement lines in the requirement might be satisfied except the line not displayed. Because there is no display of the failed requirement line, the process will treat the non-displayed requirement line as satisfied. 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.

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Field or Control	*Description*
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 cleared. 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.

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Background Key

Field or Control	*Description*
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.

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Field or Control	*Description*
Display Select Line	Select to display all courses that a student can take to fulfill an outstanding requirement on the academic advisement report. Wildcard courses are reported as: SOC 1##, HIST 24#, or ****150. For example, if you select this check box and the audit shows that the humanities requirement of six 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. When the Display Select Line feature is enabled, the advisement report shows courses available to satisfy a rule. Courses that are taken but earn no credit are not removed from the list of courses available. Instead, they remain in the list of available courses with the idea that they are still available to be used to satisfy the requirement. --- **Note:** Exceptions exist for the appearance of available courses with reports generated using the Request Advisement Report component (SAA_RPT_RQST) or the Generate Advisement Reports component (SAA_RC_RPTGEN), which includes those that appear in self service on My Academic Requirements, Search by My Requirements, and Plan by My Requirements. The exceptions are: the setup contains only DLSTs, the setup starts with a derived course list and tries to subtract something from it, or the **Display Wildcard Courses** check box on Course List Detail page is cleared. In the last case, a wildcard course appears in the course grid of the report, but the course is not linked. Sometimes course lists contain a combination of a derived course list (DLST) and a course list (CLST). For example, a derived list of courses taken in residence is combined with a wildcard course list of 200-level courses. The interactive report can display a hyperlink enabling the user to view the 200–level courses available. But, the courses taken in residence, being a derived list, cannot be displayed as available courses. Keep this behavior in mind when using the Display Select Line feature with derived course lists to communicate available courses to users. --- The system displays in 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 runtime. The system accepts inactive courses from the course catalog and previous versions of the course ID if the student took the course when the ID was active. The system does not display inactive courses on the advising report as viable options for future enrollment.

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Field or Control	*Description*
	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 (unless needed elsewhere) may have been used to satisfy the 10-unit requirement. Keep in mind that every requirement is a unit, hour, and credit requirement or a course requirement. If you select the **Enable Splitting** check box, then both units and courses are split. If a user selects the **Enable Splitting** check box on a requirement line that is a local limit, then the audit engine performs splitting only for requirement lines for which the **Enable Splitting** check box is selected. If a user selects the **Enable Splitting** check box on a requirement line that is a local limit and the requirement line points to derived lists where the **List Recall Mode** value is *Used by Requirement* or *Used by Requirement Group,* then splitting occurs only if the **Enable Splitting** check box is selected for those requirement lines targeted by the derived lists. If the **Credit Include Mode** value is *Verify* on the Line Item Parameters page, then this check box is unavailable for entry.

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.

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- 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.

  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, then:

- 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 known as Reverse Polish Notation.

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.

In standard logic, a specific notation might interact in this way:

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A union B intersect C subtract D.

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

A B union C intersect D subtract.

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

A union B would produce a result X. Then X would intersect with C, producing a result Y. Result Y would then subtract D, producing result Z.

In the second method of notation (override standard logic), the operator affects the previous two sets (left to right), therefore:

The union takes effect on A and B, producing result X. Then the intersect affects the previous two sets, X and C, producing result Y. Then subtract affects the final two sets, Y and D, producing result Z.

The result of each method of notation is the same, Z, but the second method provides increased 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

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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.

Related Links

Specifying Requirement Parameters

Setting Up Requirement Line Item Detail

Access the Line Item Detail page (**Academic Advisement** >**Academic Requirements** >**Define Academic Requirements** > **Line Item Detail**).

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.

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Line Item

Field or Control	*Description*
Course List Description	Enter a description that appears above the list of courses on the My Academic Requirements - Course List Detail and the Academic Advisement Report - Course List Detail pages. The description appears regardless of whether you have used union, subtraction, or intersection to establish the course list. The description introduces a list of courses so you may want to enter a description when you need additional or qualifying information about the courses in the list.

Line Item Detail

Field or Control	*Description*
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.

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Field or Control	*Description*
Line Detail Type	Select a value. *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 the 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. Instead, it 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.

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Field or Control	*Description*
	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. Values for this field are *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 available value is *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.

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Condition Requirement Line Type Fields

Field or Control	*Description*
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.

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Field or Control	*Description*
Condition Code	Select a condition code to specify which field or fields in the database this condition checks. For example, *Academic Level, Academic Plan, Academic Program,* and *Academic Sub Plan* are condition codes. *None:* 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 runtime. *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 in the Academic Standing table. The system evaluates this value against the student based on the as-of date that you specify at runtime. *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). *Dynamic Condition:* Select to specify a condition specification that was previously defined in the Define Dynamic Condition component. You can specify only a dynamic condition whose requirement usage value matches that of the requirement. *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

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Field or Control	*Description*
	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. 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. *Test Score:* Select to create a condition based on a test score. If you select Test Score, you are presented with additional fields **(Test ID, Test Component, Condition Operator, Test Score, Months Valid,** and **Test Score Method)** based on the setup on the Define Tests for Advisement page.

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Field or Control	*Description*
	Note: Generally, when you enter a condition code value, the **Condition Operator** and **Condition Data** fields appear on the page. If the condition code is *Dynamic Condition,* then only the **Condition Data** field is available for entry. If the condition code is *Test Score,* then additional fields are presented. 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: *Less or Equal, Greater or Equal, Equal, Greater Than, Less Than,* and *Not 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 *Dynamic Condition,* then select a previously created dynamic condition (a condition specification) from the field.
Test ID	This value appears when you select the **Condition Code** of *Test Score.* Enter the test ID (ACT, for example) to be evaluated in processing the requirement line. Values available are those defined on the Define Tests for Advisement page and whose requirement usage corresponds with that of the requirement. The field prompts on active test IDs whose effective date is equal to or prior to that of the requirement.
Test Component	This value appears when you select the **Condition Code** of *Test Score.* Enter the test component (Math, for example) to be evaluated in processing the requirement line.
Test Score	Enter the acceptable test component's score required for evaluation in the requirement line. The value you select relates to the **Test ID, Test Component,** and **Condition Operator** you selected.

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Field or Control	*Description*
Months Valid	Enter the number of months (from the test date) that the test score is considered valid. Beyond that number of months, the test score will be considered invalid and therefore will not be used to satisfy the requirement line. An empty (blank) field is interpreted to mean that the test is always valid. This field is editable depending on the setup on the Define Tests for Advisement page.
Test Score Method	This describes which score or scores you want to use. Valid values are: *Average of All Scores Taken, First Test Taken, Highest Score, Last Test Taken,* and *Lowest Score.* This field is editable depending on the setup on the Define Tests for Advisement page.
Condition Description	This (optional) description is for use with the line type of Condition and with the interactive advisement report and pdf. It is not used on the advisement transcript. When populated, the condition description prints where the condition code, operator, and condition data would normally appear. Or, in the case of a test score condition, the condition description prints where the condition code, test ID, test component, condition operator, and test score would normally appear.

Course List Line Detail Type

Field or Control	*Description*
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.

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Derived List Line Detail Type

Field or Control	*Description*
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 *before* 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**

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Field or Control	Description
	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.

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Field or Control	*Description*
	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

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Field or Control	*Description*
	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.

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Field or Control	Description
	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.)*

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Field or Control	*Description*
	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. *Course Attributes:* Select to specify a course attribute as defined on the Course Attribute Table prior or equal to the effective date on the requirement. After selecting the course

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Field or Control	*Description*
	attribute, select the attribute value. The **Attribute Value** field is available only after a course attribute is selected. 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

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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:

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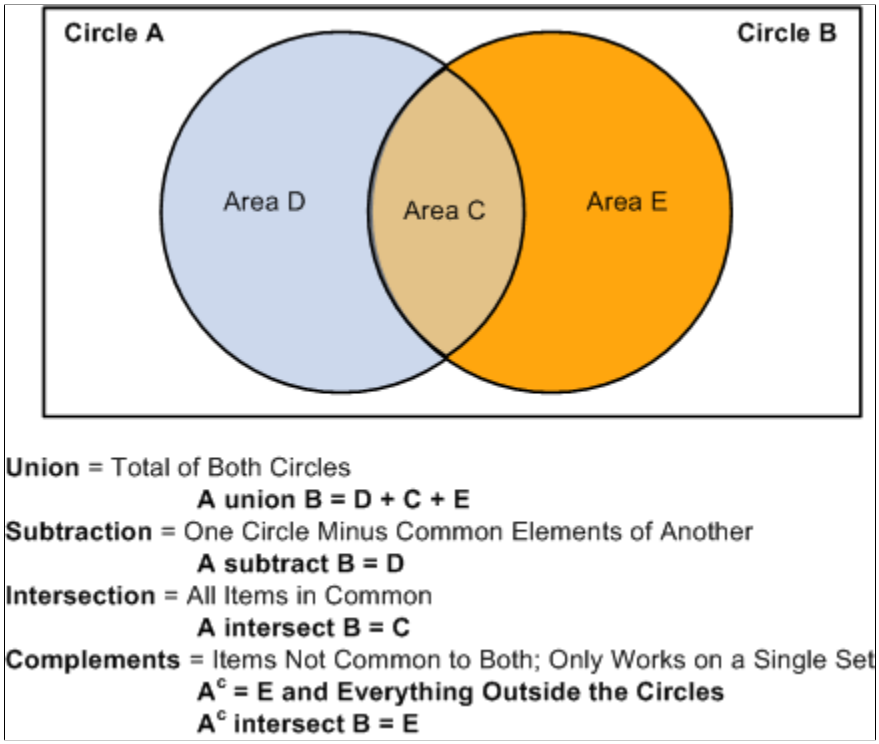
The complement of 1 unit is 2 units. A complement is an item that is not common to both areas.

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:

The diagram illustrates the intersection of a split course and its interpretation as explained in the preceding text.



The following diagram shows examples of set operations:

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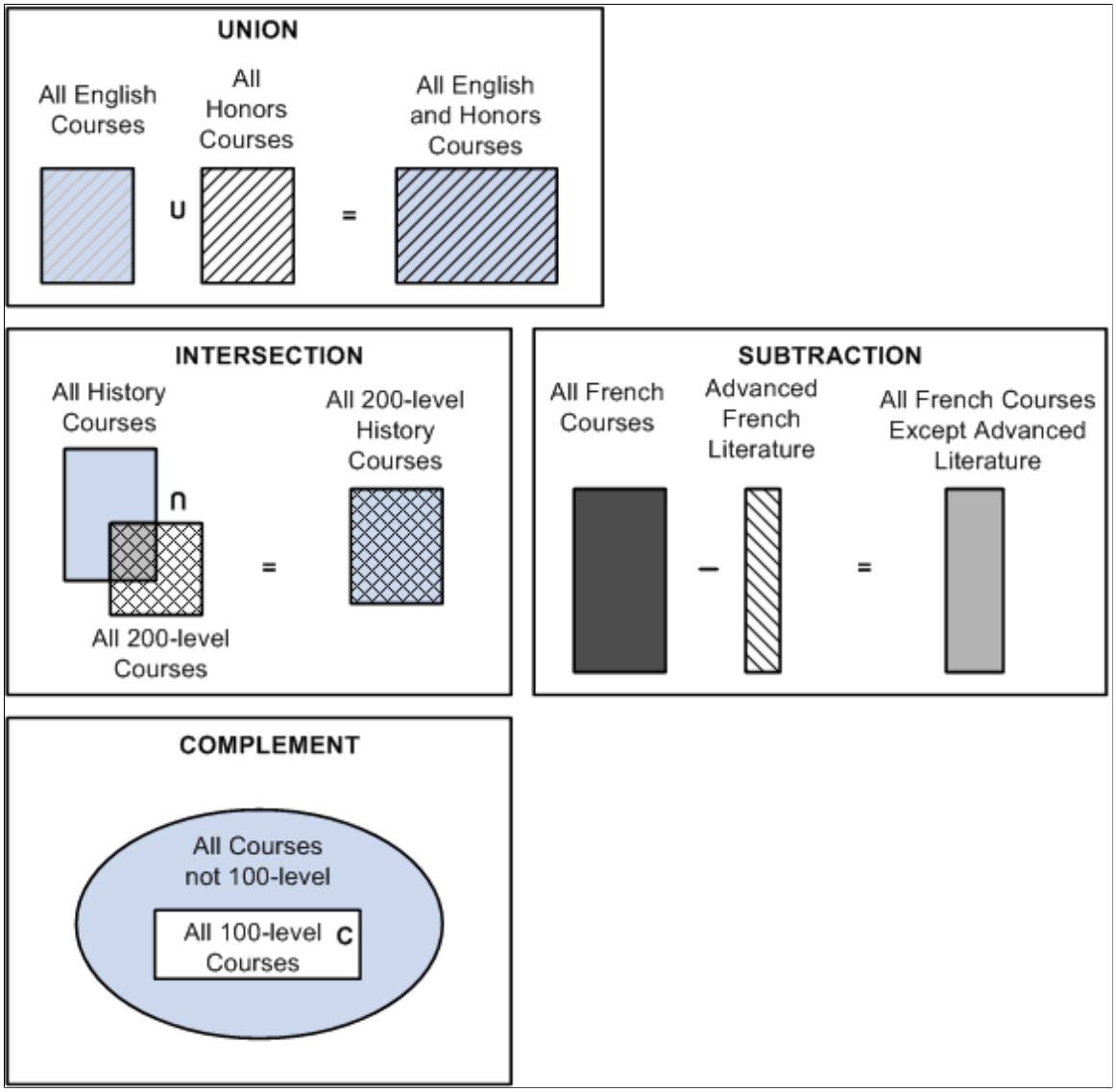
The diagram illustrates List Include Mode value set operations—Union, Intersection, Subtraction, Complement.



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.

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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

Field or Control	*Description*
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).

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Field or Control	*Description*
All, Y	All regular course lists are permitted, but the operator must be Y (Union).

Related Links

"Defining External Organizations" (Student Records)
"Processing Other Transfer Credit" (Student Records)

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Chapter 6

Setting 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 advisement 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

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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 requirement whose requirement line has a credit include mode of *Verify.* 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.

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For a requirement group with a reporting sequence number of 900 or higher that points to a requirement whose requirement line has a credit include mode of All Stats, the requirement group is processed in the order defined by its reporting sequence. It does not necessarily process last in the audit. The audit sorts courses by academic structure then reporting sequence, then requirement group number.

In another example, there are two requirement groups. Requirement group 10, whose reporting sequence is 900, is set up at the career level and points to a requirement whose requirement line is set to Verify. Requirement group 2, whose reporting sequence is 901, is set up at the career level and points to a requirement line set to All Stats. Requirement group 2 will process before requirement group 10.

Regardless of whether the requirement points to a line whose credit include mode is All Stats or Verify, the requirement group whose reporting sequence is 900 or higher displays last within its academic structure level. The print order follows the reporting sequence, regardless of the order in which the requirement group is processed.

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.

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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.

Understanding How to Create Academic Requirement Groups

To create an academic requirement group, complete these general steps:

1. Enter the institution, career, program, plan, and subplan information for the new requirement group on the Requirement Group page.

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Also, enter the descriptions as you want them to appear on the advisement transcript or advisement report (My Academic Requirements).

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.

Obeying Print Control Settings

This section describes how My Academic Requirements (aka the online report) obeys print control settings. These settings do not affect the pdf report or the advisement transcript.

To review, Print Control values determine whether the report description, report long description, and required parameters print on the advisement report. Print control settings exist at the requirement and requirement line level. In the definitions below, required parameters refer to requirement level or requirement line level parameters.

Term	*Definition*
Print on Audit Reports	Select to specify that the system always prints requirement information (the report descriptions and the required parameters) on the report.
Do Not Print	Select to specify that the system never prints report description or requirement 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 report descriptions, required parameters, and line detail.
Skip Printing of This Level	Select to specify that the system prints line detail but not report descriptions. Exceptions are identified below. This value is not used in analysis; it affects the printout format only.

Values for the Print Control 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.

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Related Links

Specifying Requirement Parameters
Specifying Requirement Line Item Parameters

Combinations of Print Control and Credit Include Mode Values

The **Print Control** field appears on the academic requirement Parameters page and on the Line Item Parameters page. The **Credit Include Mode** field appears on the Requirement Group Parameters page, the requirement 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 report descriptions, the requirement report descriptions, the requirement line report descriptions, the courses, and the conditions is printed on the advisement report.

The following table shows nearly all possible combinations of the print control and credit include mode values and whether the report 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 rows 8 and 10 of the following table cause the same information to be printed.

Table Legend

The following is a list 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.
- When the print control value is *Print if There is Line Detail* (PITILD) and there is no line detail, the Req Line Report Descrs and Course or Cond Data column values are "No." Said another way, the line report descriptions and course or condition data print only when there is line detail. An exception with use of Display Select Line is explained later in this document.
- 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.

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- The Reporting field on the Parameters page is not included.

Row #	*Req Grp Credit Incl Mode*	*Req Grp Report Descrs*	*Req Credit Incl Mode*	*Req Print Cntrl*	*Req Report Descrs*	*Req Line Credit Incl Mode*	*Req Line Print Cntrl*	*Req Line Report Descrs*	*Crse or Cond Data*
1	AS	Yes	AS	DNP	No	AS	DNP	No	No
2	AS	Yes	AS	DNP	No	AS	DNPLD	No	No
3	AS	Yes	AS	DNP	No	AS	PITILD	No	No
4	AS	Yes	AS	DNP	No	AS	SPOTL	No	No
5	AS	Yes	AS	DNP	No	AS	POAR	No	No
6	AS	Yes	AS	PITILD	Yes	AS	DNP	No	No
7	AS	Yes	AS	PITILD	Yes	AS	DNPLD	Yes	No
8	AS	Yes	AS	PITILD	Yes	AS	PITILD	Yes	Yes
9	AS	Yes	AS	PITILD	Yes	AS	SPOTL	No	Yes
10	AS	Yes	AS	PITILD	Yes	AS	POAR	Yes	Yes
11	AS	Yes	AS	SPOTL	No	AS	DNP	No	No
12	AS	Yes	AS	SPOTL	No	AS	DNPLD	Yes	No
13	AS	Yes	AS	SPOTL	No	AS	PITILD	Yes	Yes
14	AS	Yes	AS	SPOTL	No	AS	SPOTL	No	Yes
15	AS	Yes	AS	SPOTL	No	AS	POAR	Yes	Yes
16	AS	Yes	AS	POAR	Yes	AS	DNP	No	No
17	AS	Yes	AS	POAR	Yes	AS	DNPLD	Yes	No

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Row #	*Req Grp Credit Incl Mode*	*Req Grp Report Descrs*	*Req Credit Incl Mode*	*Req Print Cntrl*	*Req Report Descrs*	*Req Line Credit Incl Mode*	*Req Line Print Cntrl*	*Req Line Report Descrs*	*Crse or Cond Data*
18	AS	Yes	AS	POAR	Yes	AS	PITILD	Yes	Yes
19	AS	Yes	AS	POAR	Yes	AS	SPOTL	No	Yes
20	AS	Yes	AS	POAR	Yes	AS	POAR	Yes	Yes
21	AS	Yes	VER	DNP	No	VER	DNP	No	No
22	AS	Yes	VER	DNP	No	VER	DNPLD	No	No
23	AS	Yes	VER	DNP	No	VER	PITILD	No	No
24	AS	Yes	VER	DNP	No	VER	SPOTL	No	No
25	AS	Yes	VER	DNP	No	VER	POAR	No	No
26	AS	Yes	VER	PITILD	No	VER	DNP	No	No
27	AS	Yes	VER	PITILD	No	VER	DNPLD	No	No
28	AS	Yes	VER	PITILD	No	VER	PITILD	No	No
29	AS	Yes	VER	PITILD	No	VER	SPOTL	No	No
30	AS	Yes	VER	PITILD	No	VER	POAR	No	No
31	AS	Yes	VER	SPOTL	No	VER	DNP	No	No
32	AS	Yes	VER	SPOTL	No	VER	DNPLD	No	No
33	AS	Yes	VER	SPOTL	No	VER	PITILD	No	No
34	AS	Yes	VER	SPOTL	No	VER	SPOTL	No	No
35	AS	Yes	VER	SPOTL	No	VER	POAR	No	No

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Row #	*Req Grp Credit Incl Mode*	*Req Grp Report Descrs*	*Req Credit Incl Mode*	*Req Print Cntrl*	*Req Report Descrs*	*Req Line Credit Incl Mode*	*Req Line Print Cntrl*	*Req Line Report Descrs*	*Crse or Cond Data*
36	AS	Yes	VER	POAR	Yes	VER	DNP	No	No
37	AS	Yes	VER	POAR	Yes	VER	DNPLD	No	No
38	AS	Yes	VER	POAR	Yes	VER	PITILD	No	No
39	AS	Yes	VER	POAR	Yes	VER	SPOTL	No	No
40	AS	Yes	VER	POAR	Yes	VER	POAR	No	No
41	AS	Yes	AS	DNP	No	VER	DNP	No	No
42	AS	Yes	AS	DNP	No	VER	DNPLD	No	No
43	AS	Yes	AS	DNP	No	VER	PITILD	No	No
44	AS	Yes	AS	DNP	No	VER	SPOTL	No	No
45	AS	Yes	AS	DNP	No	VER	POAR	No	No
45	AS	Yes	AS	PITILD	Yes	VER	DNP	No	No
46	AS	Yes	AS	PITILD	Yes	VER	DNPLD	Yes	No
47	AS	Yes	AS	PITILD	Yes	VER	PITILD	Yes	Yes
48	AS	Yes	AS	PITILD	Yes	VER	SPOTL	No	Yes
49	AS	Yes	AS	PITILD	Yes	VER	POAR	Yes	Yes
50	AS	Yes	AS	SPOTL	No	VER	DNP	No	No
51	AS	Yes	AS	SPOTL	No	VER	DNPLD	Yes	No
52	AS	Yes	AS	SPOTL	No	VER	PITILD	Yes	Yes

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Row #	*Req Grp Credit Incl Mode*	*Req Grp Report Descrs*	*Req Credit Incl Mode*	*Req Print Cntrl*	*Req Report Descrs*	*Req Line Credit Incl Mode*	*Req Line Print Cntrl*	*Req Line Report Descrs*	*Crse or Cond Data*
53	AS	Yes	AS	SPOTL	No	VER	SPOTL	No	Yes
54	AS	Yes	AS	SPOTL	No	VER	POAR	Yes	Yes
55	AS	Yes	AS	POAR	Yes	VER	DNP	No	No
56	AS	Yes	AS	POAR	Yes	VER	DNPLD	Yes	No
57	AS	Yes	AS	POAR	Yes	VER	PITILD	Yes	Yes
58	AS	Yes	AS	POAR	Yes	VER	SPOTL	No	Yes
59	AS	Yes	AS	POAR	Yes	VER	POAR	Yes	Yes
60	AS	Yes	VER	DNP	No	AS	DNP	No	No
61	AS	Yes	VER	DNP	No	AS	DNPLD	No	No
62	AS	Yes	VER	DNP	No	AS	PITILD	No	No
63	AS	Yes	VER	DNP	No	AS	SPOTL	No	No
64	AS	Yes	VER	DNP	No	AS	POAR	No	No
65	AS	Yes	VER	PITILD	No	AS	DNP	No	No
66	AS	Yes	VER	PITILD	No	AS	DNPLD	No	No
67	AS	Yes	VER	PITILD	No	AS	PITILD	No	No
68	AS	Yes	VER	PITILD	No	AS	SPOTL	No	No
69	AS	Yes	VER	PITILD	No	AS	POAR	No	No
70	AS	Yes	VER	SPOTL	No	AS	DNP	No	No

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Row #	*Req Grp Credit Incl Mode*	*Req Grp Report Descrs*	*Req Credit Incl Mode*	*Req Print Cntrl*	*Req Report Descrs*	*Req Line Credit Incl Mode*	*Req Line Print Cntrl*	*Req Line Report Descrs*	*Crse or Cond Data*
71	AS	Yes	VER	SPOTL	No	AS	DNPLD	No	No
72	AS	Yes	VER	SPOTL	No	AS	PITILD	No	No
73	AS	Yes	VER	SPOTL	No	AS	SPOTL	No	No
74	AS	Yes	VER	SPOTL	No	AS	POAR	No	No
75	AS	Yes	VER	POAR	Yes	AS	DNP	No	No
76	AS	Yes	VER	POAR	Yes	AS	DNPLD	No	No
77	AS	Yes	VER	POAR	Yes	AS	PITILD	No	No
78	AS	Yes	VER	POAR	Yes	AS	SPOTL	No	No
79	AS	Yes	VER	POAR	Yes	AS	POAR	No	No
80	VER	Yes	ANY	ANY	No	ANY	ANY	No	No

In an effort to make the My Academic Requirements report more readable and user friendly, the following exceptions or adaptations have been made to the presentation of information on the online report.

- Some setup dictates that the requirement line report descriptions and required line parameters should not print and yet line detail should print. Now, the report description is displayed on the advisement report above the course grid or condition data so users have a point of reference.

  In the table above, rows 9, 14, 19, 53, and 58 are examples of where you will see the change described.

- Some setup dictates that course or condition display only when detail exists. For example, the print control for the line may be *Print if there is Line Detail.* There are circumstances where there may be no line detail and yet the *Display Select Line* was selected. In such cases, the system should print courses that may be used to satisfy the line. The change made to the online report is as follows. When the Display Select Line option is selected and there is no line detail, the report will display the report description followed by the courses that may be used. The report long description and line parameters will not display. No changes as yet have been made to the pdf report.

  In the table above, rows 8, 13, 18, 47, 52, 57 are examples of this behavior.

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- The Condition Description field is to be used with the requirement line type of condition. This field is 254 characters long and, when populated, the field value is used where the report long description normally prints. Users are not required to populate the field. If it is empty (blank) the audit will print the condition code, operator, and condition data, as it has in the past. The pdf report currently does not use the field value.

Setting Up Academic Requirement Groups

This section discusses how to:

- Set up a requirement group.
- Establish requirement group parameters.
- Define the requirement group detail.
- Set up the requirement group detail parameters.
- Specify required plans and subplans.
- Identify appended requirement group.

Pages Used to Set Up Academic Requirement Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
Requirement Group	ADVIS_RQRMNT_GROUP	**Academic Advisement** > **Academic Requirements** > **Define Requirement Groups** > **Requirement Group**	Establish the institution, career, program, plan, and subplan information for a new requirement group.
Parameters	ADVIS_RQ_GRP_PARM	**Academic Advisement** > **Academic Requirements** > **Define Requirement Groups** > **Parameters**	Establish the requirement group parameters or filters for this requirement group.
Detail	ADVIS_RQ_GRP_DET	**Academic Advisement** > **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_RG_DET_PARM	**Academic Advisement** > **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.**

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Page Name	*Definition Name*	*Navigation*	*Usage*
Plans Required	ADVIS_RQRMNT_PLANS	**Academic Advisement** > **Academic Requirements** > **Define Requirement Groups** > **Plans Required**	Define plans and subplans that are required for a specific requirement group.
Plans Appended	ADVIS_RQRMNT_SUBST	**Academic Advisement** > **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. Established requirement groups can be appended to another requirement group.

Setting Up a Requirement Group

Access the Requirement Group page (**Academic Advisement** > **Academic Requirements** > **Define Requirement Groups** > **Requirement Group**).

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. Select *Copy last record* to specify that only the last effective-dated record is copied. Select *Copy all records* 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. If you select *None,* the value converts to *Copy last record.*

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, 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 re-entering all of the field values.

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Field or Control	*Description*
Effective Date	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. Add a new effective-dated row if any of the requirement group information changes. 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 the requirement terms in the Student Program/Plan component. The system 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, 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. The system uses the student's program requirement term because that was the academic structure of the requirement group that uses this requirement, so 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, 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 is 01/01/1990.
Status	Select a value to indicate the status of the requirement group. Values are: *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.

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Field or Control	*Description*
Requirement Usage	Select the value that specifies how data in this requirement group will be used. The page must be in Add mode to enter a field value. These 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, which you can 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 Setting Up Special Requirement Usage Values. **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.*
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*. The difference between *reporting order* and *processing order* is that *reporting order* refers to the order in which courses, requirements, and requirement groups are printed in the audit report; *processing order* refers to the order in which the audit engine processes courses. Academic structure, requirement group number, and reporting sequence number affect the processing order.

Each of the following requirement groups 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 order of reporting sequence number 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

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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 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, the advisement engine reports the requirement groups by reporting sequence number. If you assign two or more requirement groups the same reporting sequence

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number (for example, 5, 10, or 900) within the same section of the academic structure, the groups are sorted by requirement group number.

If the **Reporting Seq** value is greater than *1,* 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 **Reporting 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 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

Academic Structure

Field or Control	*Description*
Academic Career	Enter the academic program for this requirement group. An academic career can have any number of academic programs.
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.

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Field or Control	*Description*
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. If an academic plan is defined only to a career, a program is not necessary.
Academic Sub-Plan	(Optional) Enter a further specialization within the academic plan. An academic plan can have any number of academic subplans. 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. **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 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.

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Description Fields

Field or Control	*Description*
Search Description, Short Search Description, and **Long Description**	Enter a description of the requirement group that is meaningful as a search key in the Search Description field. 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 Search Description appears only on this page. The **Long Description** appears on the degree audit report generated from the Student Advisement Report component. If your institution has purchased and licensed PeopleSoft Campus Self Service, the **Long Description** appears on the degree audit report generated from the View Degree Progress Report and the Evaluate My Transfer Credit self-service components. See "Applying for Graduation Using Self-Service Pages" (Campus Self Service). See "Viewing Transfer Credit Reports Through Self-Service Pages" (Campus Self Service). **Note:** You can alter the academic structure processing of requirement groups by evaluating plans before programs, evaluating subplans before plans, or both.
Report Description and **Report Long Description**	Enter a description and a long description that you want to appear on the advisement report that is generated using the Request Advisement Report or Generate Advisement Reports components (SAA_RPT_RQST or SAA_RC_RPTGEN). Use the long description to further explain the requirement group.

Display of Status

Field or Control	*Description*
Hide Status	This check box is for use with informational-only type of requirement groups --where the requirement group setup is such that it does not make sense to display on the advisement report the status of *Satisfied* or *Not Satisfied.* Select the check box if you do not want the status *(Satisfied* or *Not Satisfied)* to appear on the advisement report next to the requirement group. **Note:** The option to hide the status also exists for the requirement and requirement line.

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Using Report Long Description in Course Catalog

Field or Control	*Description*
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 Report Long Description	This check box has no effect in the delivered software.

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Pre-Condition

Field or Control	*Description*
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 clear. 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 are *Less or Equal, Greater or Equal, Equal, Greater Than, Less Than, Not Equal, In,*and *Not In.None* is the same as Equal. Operators are not used if the precondition is *Dynamic Condition.* If the precondition is *Dynamic Condition,* 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 complements. 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. After you create a condition specification, you can use it as a condition line type in an academic requirement; as a condition group line type in an academic requirement group; or as a precondition on the Requirement Group, Requirement, or Requirement Line Item page.

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Field or Control	*Description*
	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 Defining Academic Entity Groups. 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 runtime. *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.

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Field or Control	*Description*
	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 runtime. *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, which is derived from the student's term history cumulative statistics in conjunction with the processing as-of date. *Dynamic Condition:* Select to specify a dynamic condition that you previously created in the Define Dynamic Condition component. You can select only dynamic conditions that share the same requirement usage value as the requirement group. *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 Nbr 0 (student career number 0).

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Field or Control	*Description*
	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 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 lower 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 in the Student Group table. *Student Groups:* Select to specify that all student groups containing a student are part of the equation. *Test Score:* Select to specify a test score. Upon selecting this value, the following fields become available according to the setup on the Define Tests for Advisement page: Test ID, Test Component, Condition Operator, Test Score, Months Valid, and Test Score Method.

Establishing Requirement Group Parameters

Access the Parameters page (**Academic Advisement** > **Academic Requirements** > **Define Requirement Groups** > **Parameters**).

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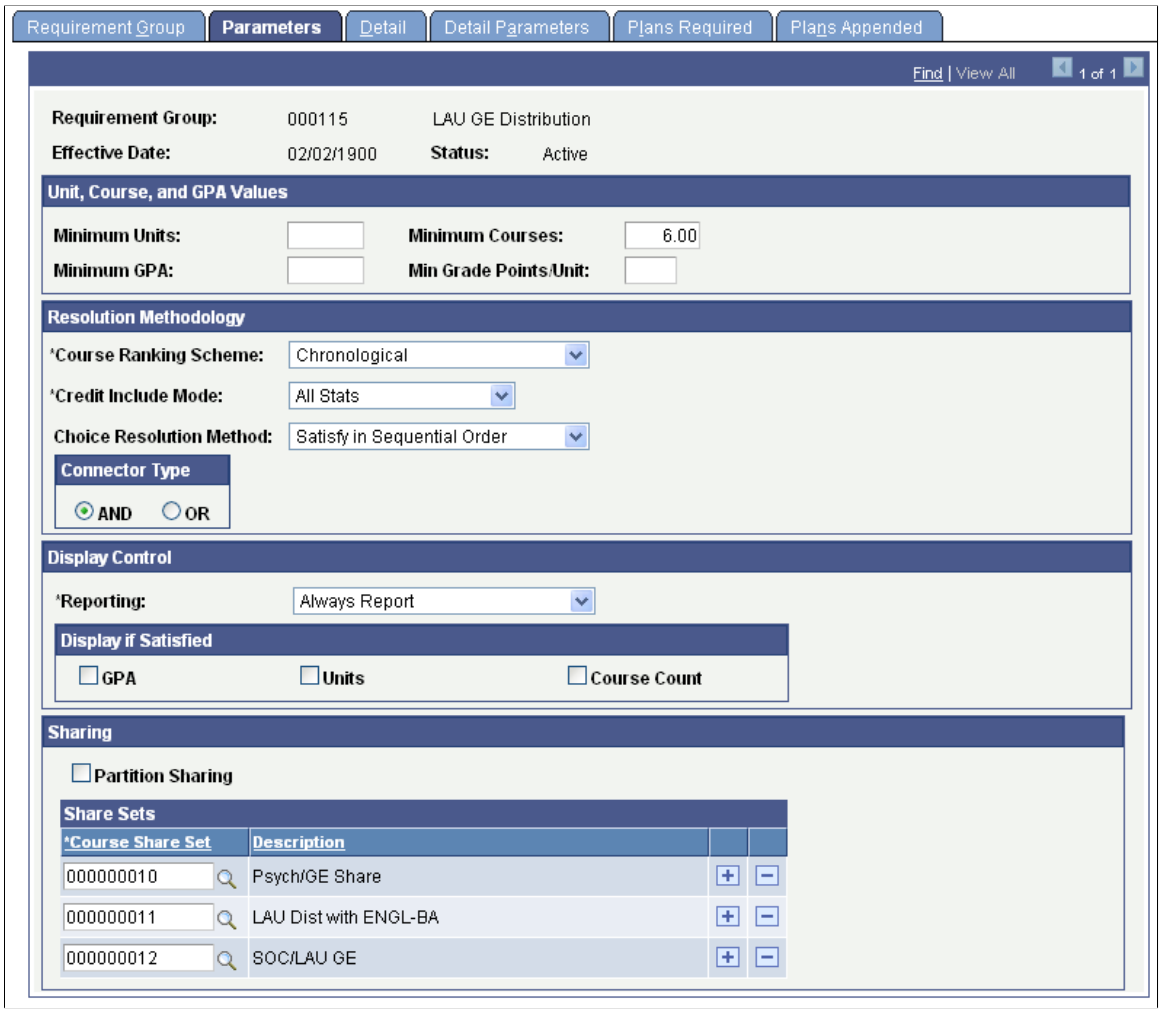
This example illustrates the fields and controls on the Parameters page. You can find definitions for the fields and controls later on this page.



Note: 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 number 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

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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.

Unit, Course, and GPA Values

Field or Control	*Description*
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.
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. The system uses this value as the default value for each detail line, where you can override it.
Minimum Courses	Enter the minimum course grade that satisfies this requirement group. This value appears by default in each detail line.

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Resolution Methodology

Field or Control	*Description*
Credit Include Mode	Select how courses in the requirement group are included in the degree audit: *All Stats:* Select to specify that all course statistics are reported. A course captured by an *All Stats* requirement group is used for that requirement group and cannot be counted toward any other *All Stats* requirement group. *Excl GPA:* 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 *Excl GPA* requirement is used for that requirement group and cannot be counted toward any other *All Stats* or *Excl GPA* requirement group. *Verify:* Select to specify that the application checks and verifies that the course was taken, but does not record the credit, so the course can be used elsewhere in the audit. A course captured by a *Verify* requirement group can be used by another *Verify* requirement group, *Excl GPA* requirement group, or *All Stats* 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.

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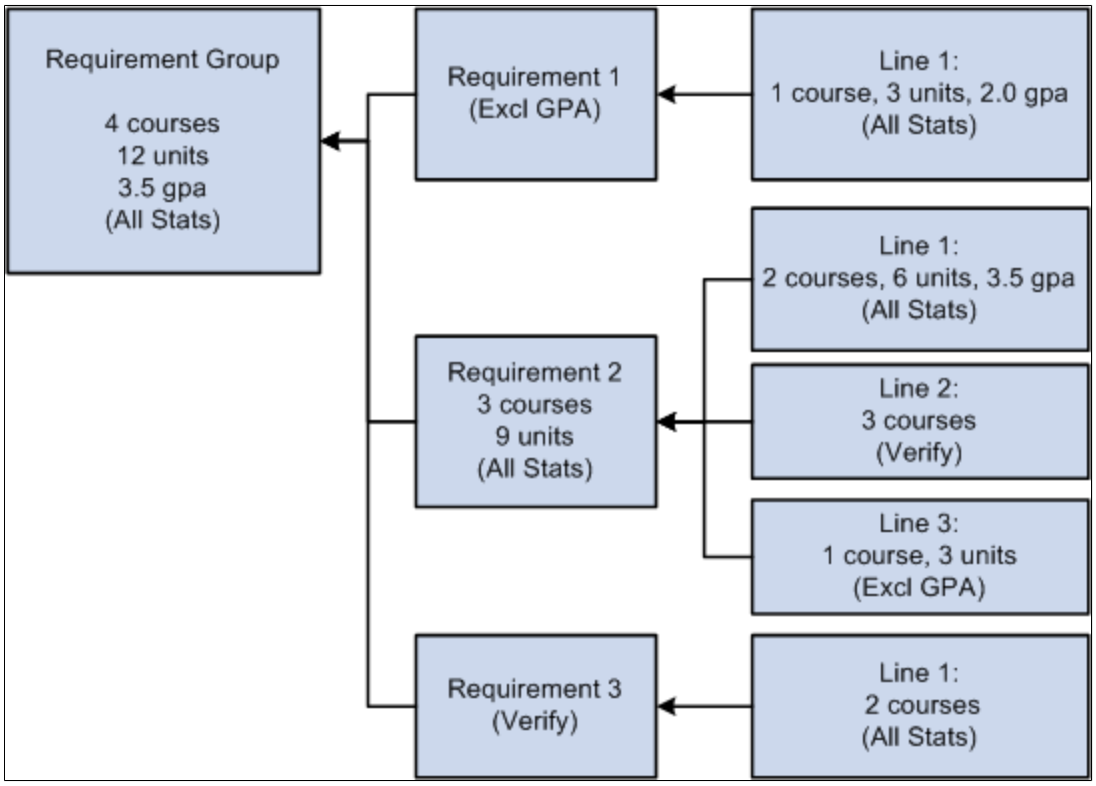
Field or Control	*Description*
	Important! When the credit include mode value is *Verify,* the parameters **(Minimum Units** and **Maximum Units Allowed** field values) act as boundaries for determining a truth value. For example, if the **Minimum Units** value is *6.0,* the **Maximum Units Allowed** value is *15.0,* and the student has fewer than six 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:

The diagram illustrates how the assigned credit include mode value at every level impacts requirements and parameters.



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.

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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.

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Field or Control	*Description*
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.

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Field or Control	*Description*
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.

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Display Control

Field or Control	*Description*
Reporting	The Reporting field values, *Report Only When Satisfied* and *Report Only When Not Satisfied,* suggest that only display of data is suppressed. However, the selection of a Reporting field value other than Always Report changes the processing logic for the requirement group. The audit engine checks the Reporting field value after all other processing is completed. The requirement group status (Satisfied or Not Satisfied) is compared against the Reporting field value *(Report if Satisfied* or *Report if Not Satisfied).* If the values do not agree (that is, both are satisfied or both are unsatisfied), the requirement group and all requirements and requirement lines attached to the requirement group are deleted from the report results. Consequently, the requirement group will not appear on the report. *Always Report:* Select to specify that the requirement group is always reported, regardless of the completion status. **Note:** To ensure consistent results, use the Reporting field value of *Always Report.* *Report Only When Not Satisfied:* 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. Use this reporting value with the Credit Include Mode of *Verify.* Using the Credit Include Mode of *All Stats* may result in unexpected report results when the requirement group is satisfied and the requirements under the requirement group are satisfied. When this occurs, the courses captured in the requirements and requirement lines are released because they are not to be reported. *Report Only When Satisfied:* 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. Select this value when the requirement group will be satisfied upon satisfaction of the requirements within the requirement group. If the requirements are satisfied and the requirement group is not satisfied, the requirement group results will be deleted and the requirement group and all associated requirement results will not be displayed in the report. The

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Field or Control	*Description*
	process will treat the non-displayed requirement group as satisfied even though it was not. 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.

Display If Satisfied

Field or Control	*Description*
GPA (grade point average)	If this check box is cleared, the report displays the GPA value based on the print control matrix in the product documentation. **Note:** Previously, if a GPA were required, the actual GPA would appear if a processing level were satisfied. This functionality will not change, even if this check box is cleared. If this check box is selected and a minimum GPA is entered, the report displays the required GPA and the calculated GPA for the specific processing level if it is satisfied. If this check box is selected and no minimum GPA is entered, the report displays the calculated GPA for the specific processing level if it is satisfied.
Units	If this check box is cleared, the report displays the appropriate units values based on the print control matrix in the product documentation. If this check box is selected and minimum units are entered, the report displays the required units and the calculated units for the specific processing level if it is satisfied. If this check box is selected and no minimum units are entered, the report displays the calculated units for the specific processing level if it is satisfied.

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Field or Control	*Description*
Course Count	If this check box is cleared, the report displays the appropriate course count values based on the print control matrix the product documentation. If this check box is selected and a minimum course count is entered, the report displays the required course count and the calculated course count for the specific processing level if it is satisfied. If this check box is selected and no minimum course count is entered, the report displays the calculated course count for the specific processing level if it is satisfied.

Sharing

Field or Control	*Description*
Partition Sharing	Select to specify that partitions can share courses. For example, the statement (A OR B) AND (B OR D) has 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 a history course that satisfies both the general education requirement and the writing requirement is available, 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:

Field or Control	*Description*
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.

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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 on the Requirement Parameters page.

Defining the Requirement Group Detail

Access the Detail page (**Academic Advisement** > **Academic Requirements** > **Define Requirement Groups** > **Detail**).

Field or Control	*Description*
(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 *NONE,* 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 *NEW* with the next sequential line number.

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Field or Control	Description
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: *Course:* Select to specify a course that a student must take. This selection is less robust than using a requirement line that points to a course list. *Requirement:* 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. *Wild Card Course:* 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. *Condition:* 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:

Field or Control	Description
Institution	This field is display-only. Each requirement group is associated with only one academic institution.

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Field or Control	*Description*
Condition Code	Select a condition code that indicates which field in the database you want the system to evaluate. For example, *Academic Level, Academic Plan, Academic Program,* and *Academic Sub-Plan* 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: *None:* No field value. *Academic Level:* 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 runtime. *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 runtime. *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). *Dynamic Condition:* Select to specify a dynamic condition that you previously created in the Define Dynamic Condition component. You can select only dynamic conditions that share the same requirement usage value as the requirement group. *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

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Field or Control	*Description*
	academic plan. On the Student Plan page, the primary career is designated with the lower 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. *Test Score:* Select to specify a test score. Upon selecting this value, the following fields become available according to the setup on the Define Tests for Advisement page: Test ID, Test Component, Condition Operator, Test Score, Months Valid, and Test Score Method. **Note:** Generally, when you enter a condition code value, the Condition Operator and Condition Data fields appear on the page. If the condition code is Dynamic Condition, then only the Condition Data field is available for entry. If the condition code is Test Score, then additional fields are presented as indicated above.
Condition Operator	Enter the type of comparison to apply to the condition data. Condition operators include *Less or Equal, Greater or Equal, Equal, Greater Than, Less Than, Not Equal, In,* and *Not In.* 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.

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Field or Control	*Description*
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 *Dynamic Condition,* then select a dynamic condition that you created previously.

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

Field or Control	*Description*
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 course.
Term	Enter the term in which the student must take the course that you specify 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 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 "Defining Class Associations" (Student Records).
Topic ID	Enter the topic ID (of the course that you specify) that the student must take 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 "Defining Course Catalog Data" (Student Records).

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

Field or Control	*Description*
Requirement	Enter the requirement to associate with this requirement group.
Requirement Usage	The system displays the requirement's usage. Requirement usage values are *Academic Advisement, Student Individualized Plan,* and *Requisite/Restriction.*

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

Field or Control	*Description*
Academic Institution	This is a display-only field. Each requirement group is associated with only one academic institution. **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 the alphabetic portion of the catalog number. The catalog number field format is NNNNAAAAAA, where *N* indicates a numeric value and *A* indicates an alphanumeric 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 numeric 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. 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 you can connect the two detail lines with the AND connector.

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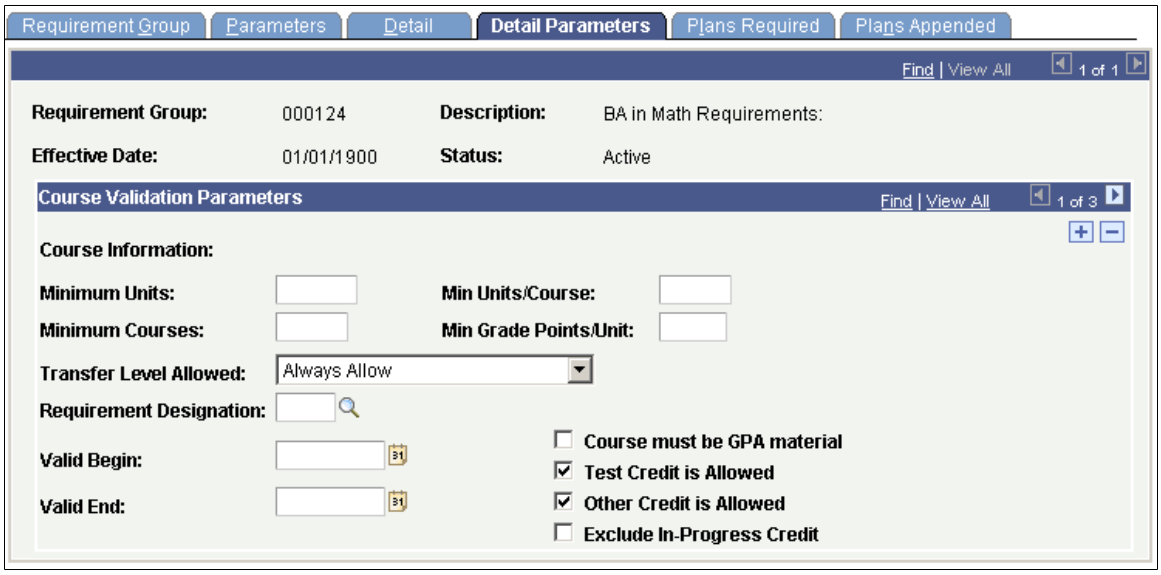
Setting Up the Requirement Group Detail Parameters

Access the Detail Parameters page (**Academic Advisement** >**Academic Requirements** >**Define Requirement Groups** >**Detail Parameters**).

This example illustrates the fields and controls on the Detail Parameters page. You can find definitions for the fields and controls later on this page.



Course Validation Parameters

Field or Control	*Description*
Course Information	Displays course information from the Detail page. Course information appears only if you entered 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 the minimum number of courses required for this detail line.
Min Grade Points/Unit (minimum grade points per 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.

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Field or Control	*Description*
Transfer Level Allowed	Enter 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:* Select to specify that all applicable transfer credit can satisfy the requirement. When selected, the value 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.

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Field or Control	*Description*
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.) 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 "Understanding Requirement Designations" (Student Records).
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.

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Field or Control	*Description*
Test Credit is Allowed	Select to specify that the course can originate from the test credit portion of the student's academic record.
Other Credit is Allowed	Select to specify that the course can originate 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 for the system to consider it valid. If you do not select this check box, then the system includes a no graded 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 advisement 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 >= 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 >= 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 course work completed, but who have at least one course in progress, will meet this requirement.

Click the links at the bottom of this page to access other pages in this component.

Related Links

"Setting Up School Types" (Recruiting and Admissions)

"Defining External Organizations" (Student Records)

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Specifying Required Plans and Subplans

Access the Plans Required page **Academic Advisement** > **Academic Requirements** >**Define Requirement Groups** >**Plans Required**).

Field or Control	*Description*
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.

Plans/SubPlans Required

Field or Control	*Description*
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.

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Example

To graduate with a Bachelor of Arts degree 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 (**Academic Advisement** >**Academic Requirements** >**Define Requirement Groups** >**Plans Appended**).

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 pre-major 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 pre-major 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 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.

Include Requirement Groups for

Field or Control	*Description*
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.

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Chapter 7

Setting Up Program Guides

Understanding Program Guides

An institution may choose not to implement PeopleSoft Academic Advisement or it may plan to do so in the future. In such cases, an institution can opt to implement the Program Guide and still offer its students the advantage of some of the self-service features. While the Program Guide is not a replacement for the Academic Advisement application, the Program Guide offers an alternative that displays the student's degree requirements so that the student can evaluate his degree progress. For example, the advisement report associated with the Program Guide displays the descriptions of requirements and attached course lists, and notes courses that the student has taken, has planned, or that are in progress. Most importantly, it offers students the use of the online planner and enhanced self-service enrollment functionality. The Program Guide is more simple to set up than the Academic Advisement application.

The Program Guide enables an institution to define degree requirements and to present them to students in a self-service format. The Program Guide advisement report is a self-service tool that enables students to view their degree requirements and to plan or enroll in a course based on those degree requirements. As part of Program Guide implementation, institutions set up course lists, requirements, and requirement groups. Unlike the Academic Advisement application, no degree audit is performed. Instead, the advisement report, which is based on the Program Guide rules, retrieves descriptions from the requirement and requirement group setup pages. The advisement report appears on self-service pages with links to the associated courses. Students can select courses for enrollment or for use in the My Planner feature. Because no degree audit is conducted, requirements do not appear as satisfied or unsatisfied.

Given the appropriate security access, individuals can view the advisement report that is based on Program Guide requirements on the following self-service pages: My Academic Requirements, Add Classes - Search by My Requirements, and My Planner - Plan by My Requirements.

Setting Up Program Guides

This section lists common elements and discusses how to:

- Select the Program Guide option.
- Set up Program Guide course lists.
- Set up Program Guide requirements.
- Set up Program Guide requirement groups.

Note: Program Guide course lists, requirements, and requirement groups use the requirement usage value of *PLNR Student Planner,* which is delivered with your system as a translate value. Do not modify it. Any modification to the value will require a substantial programming effort. The Program Guide advisement report uses only course lists, requirements, and requirement groups with the usage value of *PLNR.*

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Common Elements Used in Academic Requirements

Field or Control	*Description*
My Academic Requirements	My Academic Requirements is the name of a self-service page on which a student views his Program Guide advisement report. Students can also view their Program Guide advisement report on the Add Classes - Search by My Requirements page and the My Planner - Plan by My Requirements page.
Copy	This button appears on the Program Guide course list, requirement, and requirement group setup pages in Add mode only. Click to copy a course list, requirement, or requirement group, respectively; and then select the number of the item that you want to copy and select the appropriate copy mode. You can copy existing requirements, including those with a usage value of *Academic Advisement, Requisite Restriction,* and *Planner.* Values are: *Copy last record:* Select to copy only the last effective-dated record. This is the default. *Copy all records:* Select to copy all effective-dated records. Use this value only if the course list, requirement, or requirement group to be copied has multiple effective-dated rows. Click the *OK* button to copy the specified item. **Note:** If you use the copy feature to create a new rule (for example, a requirement), then you cannot assign a requirement number to the new requirement. When you save, after clicking the *Copy* button, the system automatically assigns the next sequential number to the new requirement. If you want to assign a specific, unused number to the new requirement, do not use the Copy feature. Instead, create the new requirement by entering the field value. The same is true for course lists and requirement groups.
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. Values are: *Active:* Enter when adding a new Program Guide course list, requirement, or requirement group. *Inactive:* Enter only if your institution will no longer use the Program Guide course list, requirement, or requirement group. Add a new effective-dated row if any of the information changes.

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Pages Used to Set Up the Program Guide

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Student Admin (installation student administration)	INSTALLATION_SA	**Set Up SACR** > **Install** > **Student Admin Installation** > **Installation Student Admin**	Select the **Program Guide** option to indicate that advisement reports will use Program Guide course lists, requirements, or requirement groups.
Define Course Lists	SAA_CLST_PLNR	**Academic Advisement** > **Program Guide Requirements** > **Define Course Lists**	Set up the Program Guide course lists that you want to use.
Define Requirements	SAA_RQ_MAIN_PLNR	**Academic Advisement** > **Program Guide Requirements** > **Define Requirements**	Set up the Program Guide requirements.
Program Guide Requirement Groups	SAA_RQ_GRP_PLNR	**Academic Advisement** > **Program Guide Requirements** > **Define Requirement Groups**	Set up the Program Guide requirement groups.

Selecting the Program Guide Option

To set up the Program Guide, you must identify on the Installation Student Admin page that you intend to use the Program Guide. The remaining tasks are to set up the Program Guide course list, requirements, and requirement groups, in that order.

Access the Installation Student Admin page (**Set Up SACR** > **Install** > **Student Admin Installation** > **Installation Student Admin**).

The Program Guide uses or relates to these elements shown on this page: *Last Course List Sequence, Last Requirement ID, Last Requirement Group,* and *Program Guide.*

See "Pages Used to Select Student Administration Installation Options" (Campus Solutions Application Fundamentals).

Academic Advisement

Field or Control	*Description*
Program Guide	Select this option to indicate that your institution intends to use the Program Guide.

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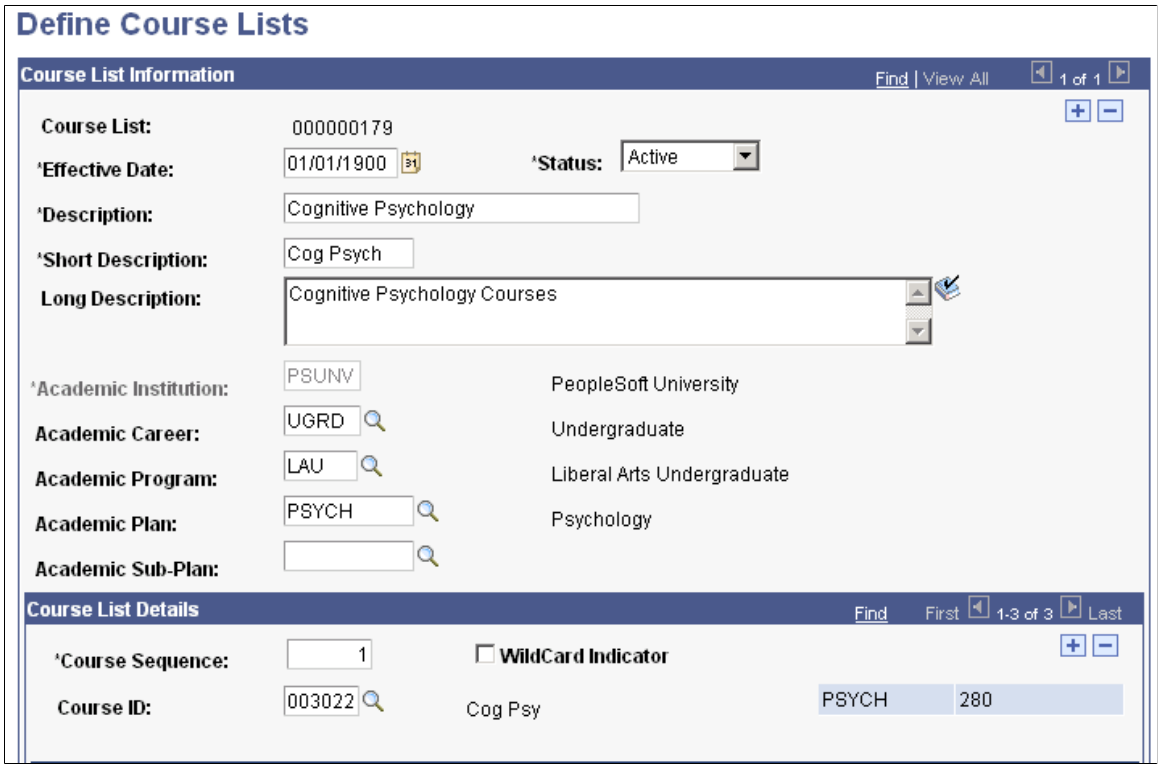
Setting Up Program Guide Course Lists

Access the Define Course Lists page (**Academic Advisement** > **Program Guide Requirements** > **Define Course Lists**).

This example illustrates the fields and controls on the Define Course Lists page (1 of 2). You can find definitions for the fields and controls later on this page.



Academic course lists are the principal component of the Program Guide. They list courses or wildcard courses. Requirements use course lists to identify the courses that a student must select from to complete a degree requirement. You specify courses using either a unique course ID or 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. The alternative would be to manually enter each English course, row by row.

Course List Information

Field or Control	*Description*
Course List	If you did not specify a unique identifying number when you created the requirement, then the system assigns a number upon saving and the number appears here.

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Field or Control	*Description*
Effective Date	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. 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 another example, suppose that a requirement group is defined at a program level. The requirement group has two effective-dated rows, 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.
Description, Short Description, and Long Description	Enter descriptions that will be useful to those who maintain the course lists and corresponding requirements and requirement groups. The descriptions are used primarily for searching. None of these values appears on the Program Guide advisement report.
Academic Institution, Academic Career, Academic Program, Academic Plan, and **Academic Sub-Plan**	These fields document departmental ownership of the course list. They are used for prompting and documentation only; they do not affect the auditing analysis.
Fetch	Click to retrieve and display the course sequence data for the effective-dated row. You can then add or modify courses in the course list. This button does not appear when you are in Add mode.

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Course List Details

Field or Control	*Description*
Course Sequence	The system displays a sequence of numbers, and each sequence represents a course ID. The system assigns the numbers sequentially but you can change the sequence. The courses do not need to be in a particular order. They will appear on the report in alphabetical order by subject and by catalog number. For example, HIST 101, HIST 220, PHIL 100.
Course ID	Enter the course ID that specifies the course needed to satisfy this course list. You can prompt on this field and enter search criteria to narrow 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 not available if you select the *WildCard Indicator* check box.
Wildcard Indicator	Select to set up a wildcard course. When selected, additional fields become available on the page so that you can define the wildcard.
Display Wildcard Courses	The system displays this check box when the **Wildcard Indicator** check box is selected. Select this check box to display the wildcard courses in the course grid on the Program Guide advisement report.
Subject	The system displays this field when the **Wildcard Indicator** check box is selected. Enter the subject of the course offering. Leave this field blank if any subject is acceptable. The subject and catalog number appear in the Course column in the course grid of the advisement report.

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Field or Control	*Description*
Catalog Nbr (catalog number)	The system displays this field when the **Wildcard Indicator** check box is selected. Enter the required portion of the catalog number that is a 10-character field. Use the format NNNNAAAAAA, where the first four characters are numeric and the last six 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 wildcard 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 wildcard in any position in the field. When you use wildcards, the system does not check equivalent courses as an efficiency constraint. A table is available which provides you with an overview of how the system processes different wild card values. See Creating a Course List Detail. **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 wildcard for 100-level courses. In a second detail line, you can use a wildcard for all 200-level courses. Use the # to represent the first four numeric values, and use the * to represent the last six 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 the numbers 1 through 19 plus one alphanumeric character.
Report Description	The system displays this field when the **Wildcard Indicator** check box is selected. Enter a brief description of the wildcard course. This description appears in the Description column of the course grid on the Program Guide advisement report.

Setting Up Program Guide Requirements

Access the Define Requirements page (**Academic Advisement** > **Program Guide Requirements** > **Define Requirements**).

Use this component to set up program guide requirements. These requirements are graduation rules, that is, rules that the students need to fulfill to successfully complete their academic objectives. Program Guide requirements contain course lists. After setting up academic requirements, you must set up

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requirement groups and attach requirements to them. Only then can the Program Guide retrieve and display the graduation rules on the Program Guide advisement report.

Basic Data

Field or Control	*Description*
Requirement	If you did not specify a unique identifying number when you created the requirement, then the system assigns a number upon saving and the number appears here.

Academic Structure

Field or Control	*Description*
Academic Institution, Academic Career, Academic Program, Academic Plan, and **Academic Sub-Plan**	Enter information that documents the departmental owner of the requirement. This data simplifies searches and prompts.

Description Fields

Field or Control	*Description*
Search Description, Report Description, and **Report Long Description**	Enter a search description, which will appear only on this page. This description will be used for searching and prompting. Enter a relatively short, but meaningful, report description. This description will appear on the Program Guide advisement report. Enter a meaningful long description. This description will appear on the Program Guide advisement report.

Requirement Lines

Field or Control	*Description*
Line Nbr (line number)	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 requirement lines appear on My Academic Requirements.
Course List	Select the course list.

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Field or Control	*Description*
View	Click to access the Course List Summary page, where you can then click the *Fetch* button and view the courses in the course list.

Setting Up Program Guide Requirement Groups

Access the Program Guide Requirement Groups page (**Academic Advisement** > **Program Guide Requirements** > **Define Requirement Groups**).

Requirement groups consist of requirements that, in turn, consist of course lists. Therefore, you must create course lists first, requirements second, and then requirement groups. Requirement groups identify the student population affected by the rules. For example, requirement groups can target all undergraduate students, only undergraduate students in the math plan, or only undergraduate students who belong to a specific student group. The Program Guide report displays only the rules that apply to the student based on the student's academic structure.

Basic Data

Field or Control	*Description*
Reporting Sequence	When the reporting sequence number is 1 for all requirement groups, the report displays them in this order: career-level requirement groups, program requirement groups, plan requirement groups, and subplan requirement groups. Requirement groups that are set up at the same academic structure level and with the same reporting sequence number appear on the report in the order of the requirement group numbers.

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Field or Control	*Description*
Effective Date	Enter an effective date to define when the status that you select is valid. (Insert 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 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. As an example, suppose that you apply a requirement group defined at a program level to a student. The requirement group has two effective-dated rows: 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: 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.

Academic Structure

Field or Control	*Description*
Academic Institution	Enter the academic institution. The default value is provided by the user defaults.
Academic Career	Enter the academic career for this requirement group. An academic career can have any number of academic programs.

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Field or Control	*Description*
Academic Program	Enter the academic program for this requirement group. If you leave this field blank, then the requirement applies to all students in the career identified in the **Academic Career** field.
Academic Plan	Enter the academic plan for this requirement group. An academic program can have any number of academic plans. If you leave this field blank, then the requirement applies to all students in the career and program identified.
Academic Sub-Plan	Enter the academic subplan for this requirement group. If you do not enter a value, then the requirement group applies to all subplans within the specified career or plan, if a plan is entered on this page.

Description Fields

Field or Control	*Description*
Search Description, Report Description, and **Report 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. Enter a relatively short, but meaningful, report description. This description appears on the Program Guide advisement report. Enter a meaningful long description. This description appears on the Program Guide advisement report.

Requirement Group Details

Field or Control	*Description*
Group Line Nbr (group line number)	The system generates this sequential line number. Computer-generated line numbers are assigned in increments of 10, but you can change them. This field value determines the order in which the detail lines appear on the report. When you insert a line, the system replaces the field value of *NEW* with the next sequential line number.
Academic Requirement	Enter an academic requirement that the student must satisfy.

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Chapter 8

Setting Up Advisement Report Types

Understanding Advisement Report Types

The advisement report is the degree audit report that reflects a student's progress toward graduation. The report is the core function of the Academic Advisement application. The report displays the academic requirements for a student's program of study and indicates whether the student has completed those requirements. The report provides course details about the courses that are available and the courses already taken. It also is an indication of the student's progress. For example, the advisement report shows whether the student has taken a course. It can also show whether the student is enrolled in the course, plans to take the course, or if it is a what-if course.

The advisement reports, including what-if advisement reports are all based on advisement report types. Before you are able to generate an advisement report, whether administratively or for use in self-service, you must first define report types. When you define advisement report types, you define attributes for the report. For example, define whether you want that type of advisement report to display in-progress courses, planned courses, or courses from the shopping cart. You can also set up special advisement report types that reference academic requirement groups with a special requirement usage (other than the Academic Advisement default, which is used for most of the general advisement requirements).

If you plan to give individuals access to the advisement reports using the self-service pages known as My Academic Requirements (SAA_SS_DPR_ADB) page, the Add Classes - Search by My Requirements (SAA_SS_DPR_ADB_SR) page, the My Planner - Plan by My Requirements (SAA_SS_DPR_ADB) page, the What-If Report - Create What-if Scenario (SAA_SS_WHATIF) page and the Evaluate My Transfer Credit – Generate a What-If Advisement Report (SS_TRCR_AA_RQST) page, you must create at least two report types: one for use with the My Academic Requirements page, one for use with the Plan by My Requirements and Search by My Requirements pages (which can be the same as that used with the My Academic Requirements page), and one for the what-if reports.

If you plan to use the advisement transcript, and you do not want a degree audit to generate report results for every program status (such as a student's completed program of study), then you must define a report type using the Define Advisement Report component and identify the valid program statuses. The report type name must be the same as that of the respective advisement transcript.

Important! If you are using the Program Guide report types, you do not need to set up advisement report types.

See the product documentation for "Defining Academic Institutions" (Campus Solutions Application Fundamentals)

Setting Up Advisement Report Types

To set up an advisement report type, use the Define Advisement Report Type component (SAA_RPT_TYPE).

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This section lists a prerequisite and discusses how to define advisement report types.

Prerequisite

Select the **Academic Advisement** option on the Installation Student Administration page.

Related Links

"Pages Used to Select Student Administration Installation Options" (Campus Solutions Application Fundamentals)

Page Used to Set Up Advisement Report Types

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Advisement Report Type	SAA_RPT_TYPE	**Set Up SACR** >**Product Related** >**Academic Advisement** >**Define Advisement Report**	Identify the type of report and the number of reports to keep; define the reports attributes, define default dates, and identify valid careers.

Defining Advisement Report Types

Access the Define Advisement Report Types page (**Set Up SACR** >**Product Related** >**Academic Advisement** >**Define Advisement Report**).

Field or Control	*Description*
Effective Date	Enter the effective date that determines when this report type is available for selection on the Academic Institution 7 page and the following components: Request Advisement Report, Generate Report Requests, Generate Advisement Reports, Print Batch Report, and Purge Report Results.
Description and Formal Description	Enter text in the **Description** field to use for searching. This text does not appear on the advisement report. Enter text in the **Formal Description** field. This text is used for searching and also appears on the advisement report generated from the Request Advisement Report component. The system does not use the Description and Formal Description values in the reports viewed in self-service.

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Field or Control	*Description*
Maximum Reports to Keep	Enter the number of report requests that you want to save. The default value is 1. Institutions can save one or more report requests. Each time you run an advisement report, data used in the audit is sent to a number of results tables. If your institution wants to save more than one report, keep in mind that the results tables will grow quickly. If you keep only one report, then the next time an advisement report is generated, the results will overwrite the previous results. If, however, you save more than one report for a specific advisement report type, then administrators will see multiple completed reports when they search for report results and they can select from among the saved reports. In self-service, students and advisors view saved reports on the What-If Report – What-If Report Selection page. For example, if you allow two what-if advisement report type requests to be saved and the student has generated two what-if reports, then the student can view both the saved reports when he or she visits the What-If Report – What-If Report Selection page. Regardless of the value in the **Maximum Reports to Keep** field, the self-service pages of My Academic Requirements, Plan by My Requirements, and Search by My Requirements will always display the most recent report only. The same is true for a what-if report generated from the Evaluate My Transfer credit – Generate a What-If Advisement Report page.

Date Controls

Field or Control	*Description*
Report Date	*Current Date:* If selected, the current date becomes the default value in the **Report Date** field on the Report Request page when you create or regenerate an advisement report. *Select Date on Request*: This is the default value. Select this option to change the default Report Date value on the Report Request page. If you regenerate an advisement report where the Report Date value was Select Date on Request, the value originally defined, defaults in the Report Date field on the Report Request page. You must then manually change the date as needed.

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Field or Control	*Description*
As of Date	*Current Date:* If selected, the current date displays, by default, when you access the Report Request page. *Installation Default Date:* If selected, the **As of Date** field value from the Installation Academic Advisement page becomes the default **As of Date** on the Report Request page. *Select Date on Request:* If selected, the default **As of Date** value on the Report Request page is blank. You must define the **As of Date** on the Report Request page.

Note: The Report Date and As of Date fields on the Generate Report Requests page obey the same defaults after you select a report type field value for the request. See Generating Batch Academic Advisement Report Requests for details.

Report Attributes

Field or Control	*Description*
Special Advising Report	Select to create an academic advisement report type that references academic requirement groups with a special requirement usage other than the default *(Academic Advisement),* which is used for most general advising requirements. If you select the **Special Advising Report** check box, the **Requirement Usage** field becomes available for entry.
Include In-Progress Courses	Select to include ungraded courses or graded courses with an in-progress type of grade (as defined in the Grading Scheme Table component) in the degree audit. In-progress courses are flagged as such on the advisement report.
Include Planned Courses	Select to include planned course information in the degree audit. Planned courses are flagged as such in the advisement report.
Include What-If Information	Select to include what-if course information in the degree audit. The what-if courses are flagged as such in the advisement report. Students view what-if reports by accessing the What-If Report - What-If Report Selection page.

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Field or Control	*Description*
Display Topics in AA Reports (display topics in academic advisement reports)	Select to display topic information on the advisement report if a specific topic is defined on the course list. In the interactive advisement report (for example, the My Academic Requirements page), the topic information appears with the course description. In the .PDF view of the advisement report, the topic information appears in the course history section of the report.
Include Completed Transfer Models	This check box is intended for use with the what-if report types and for prematriculated students, such as prospects and applicants. If selected, the advisement report will include transfer credit models that are *Completed.* The *Completed* status means that the transfer credit is approved but not yet posted because the individual is not yet term activated. Specifically, the degree audit will evaluate the internal course equivalents (course, test, and other) of a student's completed transfer model. The system does not evaluate courses recorded under completed transfer models that do not match the student's what-if program or current program.
Include Self-Reported Transfer Models	This check box is intended for use with the Evaluate My Transfer Credit (SS_TRCR_MODEL) component especially so that prospective (non-matriculated) or active students can generate a what-if advisement report that takes into consideration self-reported transfer credit. The degree audit evaluates only those self-reported courses that match the what-if program of study identified in the component. **Note:** The self-reported courses that are used in the audit will appear in the same way as a course taken at the institution. They do not appear with the what-if icon.
Include Shopping Cart Courses	Select to include courses from the student's shopping cart in the degree audit. The shopping cart courses are flagged as Planned courses on the My Academic Requirements page and as shopping cart courses on the .PDF report.

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Field or Control	*Description*
Requirement Usage	If you select the **Special Advising Report** check box, the **Requirement Usage** check box becomes available for entry. Select the usage that identifies the special academic requirement group that you want to evaluate for this report type. For example, you could create a special requirement usage to evaluate satisfactory academic progress or National Collegiate Athletic Association (NCAA) eligibility. The system evaluates special requirement groups only when you run special advisement reports. In this case, you might create a requirement usage of NCAA.

Note: If you selected any of the respective **Include In-Progress Courses, Include Planned Courses, Include What-If Information,** and **Include Shopping Cart Courses** check boxes and also defined a **Default AA What If Grade** (on the Grading Scheme Table page) for a grade basis that matches that of the planned, in-progress, what-if, or shopping cart courses, the system will use that default grade in the degree audit. This value is needed for repeat checking. If no default grade is defined, the audit assumes successful completion of the course for the purpose of satisfying a degree requirement, but it does not perform repeat checking.

Important! To generate an advisement report from the Evaluate My Transfer Credit component, you must select both the Include Completed Transfer Models check box and the Include Self-Reported Transfer Models check box.

See "Identifying Self-Service Report Types" (Campus Solutions Application Fundamentals)

Valid Careers

Field or Control	*Description*
Career Sequence Number	The system populates this field for the first row with a value of 1 and increments each additional row by one. The sequence number indicates a unique row of information and the order in which academic career information appears on the report. For example, if a student is active in two academic careers (undergraduate and graduate), the report type setup shown previously would produce a report wherein the student's undergraduate (Seq Nbr 1) degree audit appears first, followed by the student's graduate (Seq Nbr 2) degree audit. The order in which a student becomes active in a career has no effect on the print order. Career print order is always specified by the report type sequence.

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Field or Control	*Description*
Academic Career	Enter all possible careers that this report type can report. You can insert rows to add more than one career per report type. When you run the request process for this report type, the system generates degree audit information for each career in which the evaluated student is active. For example, if you have specified 10 careers for a single report type and you generate an advisement report for a student who has one career that matches one of the careers specified and another career that does not match, then only the details associated with the matching career will appear. The degree audit information for the non-matching careers will not appear. Academic career values are set up as translate values and are defined on the Academic Career Table page. For the report types selected for use with the What-If Report – Create What-if Scenario self-service page, the careers identified on the report type will display in the Career field's list of values on the page. And the careers in the list of values appear in the sequence order defined on the report type.
Formal Description	Enter a description for the career. This description is not printed on the advisement report; it is only for use by your institution.

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Valid Program Statuses

Field or Control	*Description*
Program Status	Select the program status values that are valid for the report type. Valid values are: *Active in Program* - Select to include report results for students whose program status is Active in Program. *Cancelled* - Select to include report results for students whose program status is Cancelled. *Completed Program* - Select to include report results for students whose program status is Completed. *Deceased* - Select to include report results for students whose program status is Deceased. *Discontinued* - Select to include report results for students whose program status is Discontinued. *Dismissed* - Select to include report results for students whose program status is Dismissed. *Leave of Absence* - Select to include report results for students whose program status is Leave of Absence. *Suspended* - Select to include report results for students whose program status is Suspended.

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Chapter 9

Creating and Managing Advising Notes

Creating and Managing Advising Notes

The Advising Notes feature enables advisors and other users to record notes about their interactions with students. This section discusses the administration of advising notes.

The Advising Notes (administration) page is intended for an administrative super user with unrestricted access to all advising notes in the system. Besides creating and updating notes, an administrator can edit note text, reassign notes and reopen closed notes.

Page Used to Manage Advising Notes

Page Name	*Definition Name*	*Navigation*	*Usage*
Advising Notes	SAA_ADV_NOTE	**Curriculum Management** >**Instructor/ Advisor Information** >**Advising Notes** or **Academic Advisement** >**Student Advisement** >**Advising Notes**	Create, update and close advising notes created by any advisor for any advisee.

Managing Advising Notes

Use the Advising Notes (administration) page to manage Advising Notes in the system.

Navigation:

Access the Advising Notes page either from **Curriculum Management** >**Instructor/Advisor Information** >**Advising Notes**

or

Academic Advisement >**Student Advisement** >**Advising Notes**.

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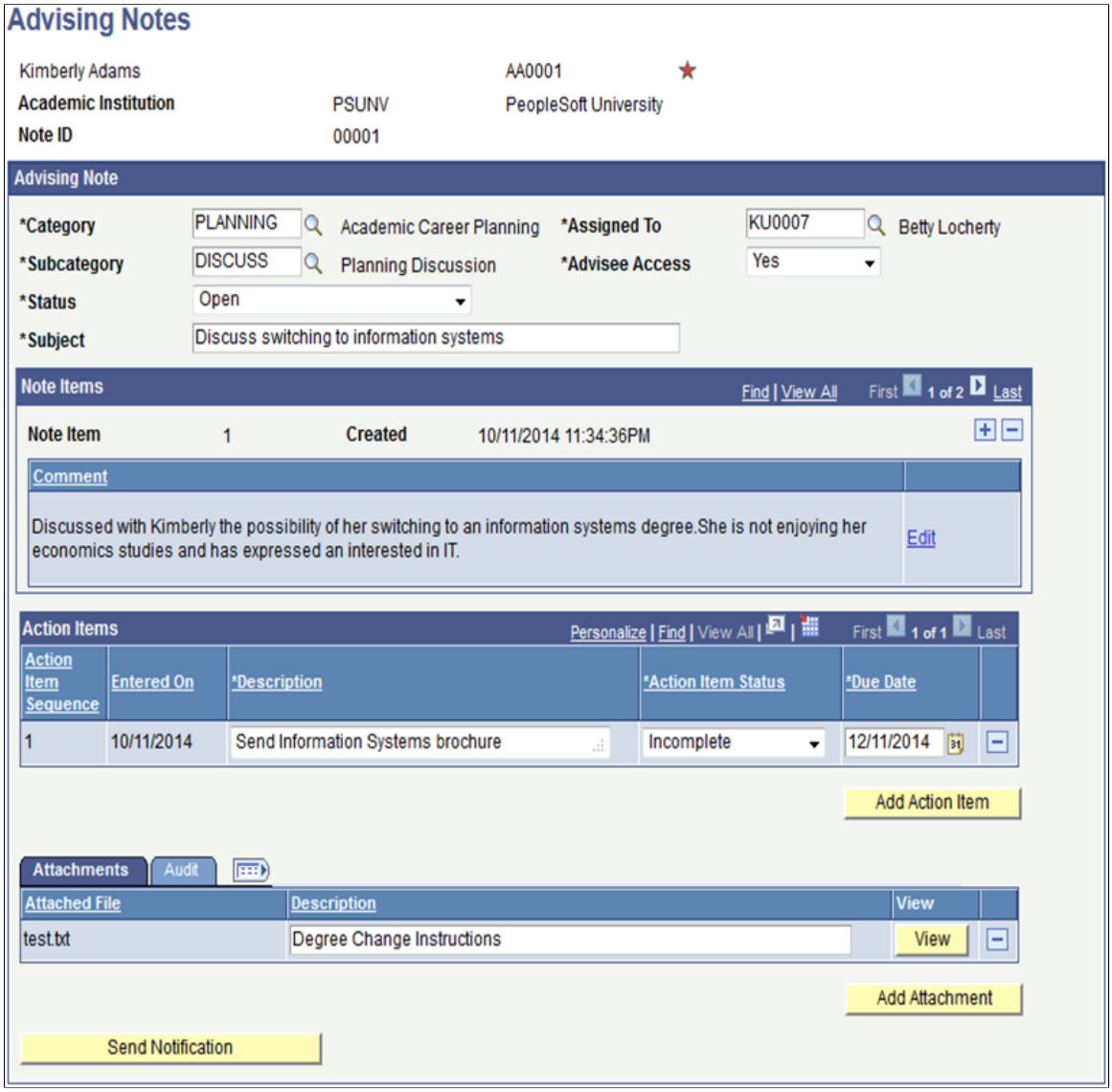
Advising Notes (administration) page



Field or Control	***Description***
Category	Select a note category. You can define category values in the Note Category table. See "Defining Note Categories and Access Control" (Campus Self Service) for more information.
Subcategory	Select a note subcategory. You can define subcategory values in the Note Subcategory table. See "Defining Note Subcategories" (Campus Self Service) for more information.
Status	Select either *Open* or *Closed*. Only an administrator can reset note status from *Closed* to *Open*.

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Field or Control	*Description*
Assigned To	Assign the note to an advisor.
Advisee Access	Select *Yes* to allow advisee access to the note. The default value is *No*. See "Defining Academic Advisement Setup" (Campus Self Service) for information on advisee access to advising notes.
Subject	Enter a subject line for the note.
Note Items	Create, browse, edit and remove comments for the advising note.
Action Items	Add, browse and remove action items for the advising note. The **Entered on** date is automatically recorded. You can set a **Due Date** for an item and **Action Item Status** to either complete or incomplete. See "Defining Academic Advisement Setup" (Campus Self Service) for information on setting up the Action Items region.
Attachments	Add, view and remove files as attachments to the advising note.
Send Notification	Click this button to notify the advisee by email. A **Notify Advisee** dialog box opens with details of the note and a link to the note page. Optionally, you can add a message for the advisee. See "Defining Academic Advisement Setup" (Campus Self Service)on setting up and customizing notifications for advisees.

Related Links

"Viewing Advisee Information Through Self-Service Pages" (Campus Self Service)
"Setting Up Self-Service Features for Academic Advisement" (Campus Self Service)

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Chapter 10

Managing Batch Academic Advisement Reports

Understanding Batch Academic Advisement Reports

Your institution has several ways to generate report requests in batch. The Population Selection process provides a configurable selection tool that enables users to create groups of people or organizations. The following tools are available for use in the Population Selection process:

- PS Query
- Equation Engine
- File Upload

Your institution can use the report identifier to group individual requests and process them as a group. The batch process consists of these steps:

1. Request advisement reports.
2. Process the requests (that is, generate the reports).
3. Print the reports in batch. Printing the reports generates results and creates a .pdf of the reports.
4. Purge reports and report requests.

You can generate what-if reports in batch for both students and prematriculated students (for example, prospective students), provided the prematriculated students have an EMPLID. Note that you can generate advisement reports without the what-if parameters (degree audit based on current academic structure) for active students only.

These topics also include information about purging the advisement transcript data from the analysis database tables.

Prerequisites

Before you can process advisement reports, you must:

- Select the Academic Advisement option on the Installation Student Administration page.
- Set up advisement report types.
- Define additional report identifiers, as needed.

See the product documentation for "Understanding Installation Setup and System Defaults" (Campus Solutions Application Fundamentals)

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See the product documentation for Setting Up Advisement Report Types

Common Elements Used in Managing Batch Academic Advisement Reports

Field or Control	*Description*
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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler Request page, where you can initiate the process
Academic Institution	Enter the institution for which you want to process the batch academic advisement reports.
Report Type	Enter the type of advisement report you want to generate.
Report Identifier	Enter the report identifier. The report identifier is useful for grouping advisement reports. You can define additional report identifiers, as needed.

Generating Batch Academic Advisement Report Requests

This section discusses how to:

- Generate batch advisement report requests.
- Generate batch advisement reports.
- Print batch advisement report requests.

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Pages Used to Process Batch Advisement Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Generate Report Requests	SAA_RUNCTL_RPTRQST	**Academic Advisement** > **Advisement Processes** > **Generate Report Requests**	Define the report request.
Generate Advisement Reports	SAA_RC_RPTGEN	**Academic Advisement** > **Advisement Process** > **Generate Advisement Reports**	Define the run control parameters for the report.
Print Batch Reports	SAA_RC_RPTPRINT	**Academic Advisement** > **Advisement Processes** > **Print Batch Reports**	Define the printing parameters for the report.

Generating Batch Advisement Report Requests

Access the Generate Report Requests page (**Academic Advisement** >**Advisement Processes** >**Generate Report Requests**).

Advisement Report Request Data

Field or Control	*Description*
Report Date	When you create a new request, the **Report Date** field displays the current date until you select a Report Type value. Then the Report Date field value displays the appropriate Report Date based on the advisement report type setup. If the default value defined for the advisement report type is *Current Date*, then you can view two additional items on the page: the **Use This Request Report Date** check box and the **?** icon, which offers explanatory text.
As of Date	Reflects the As of Date value identified in the report type setup. When you access the page, the As of Date field value displays the value defined in the Installation Academic Advisement component. This remains the default value until you select the Report Type field value on the page. Then the value will reflect the advisement report type setup. If the default value defined for the advisement report type is *Current Date*, then you can view two additional items on the page: the **Use This As of Date** check box and a **?** icon, which offers explanatory text.

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Field or Control	*Description*
Use This Request Report Date	Select this option for the request process to use the user-defined date as Report Date. If the check box is not selected, then the **Report Date** on the request is updated with the current date. **Note:** This check box appears only when the **Report Date** value defined in the advisement report type is *Current Date*.
Use This Request As of Date	Select this option for the request process to use the user-defined date as the As of Date. If the check box is not selected, then the As of Date on the request is updated with the current date. **Note:** This check box appears only when the **As of Date** field value defined in the advisement report type is *Current Date*.
	Mouse-over the icon to read explanatory text for the check box. You can use Message Catalog to customize these texts: • **Use this Request As of Date** check box: Entry 14530, 13. • **Use this Request Report Date** check box: Entry 14530, 14.
Freeze Record	Select to prevent this request from being purged during a subsequent academic advisement purge process.

Population Selection

This group box appears when the *Population Selection* process is selected.

Population selection is a method of selecting the IDs to process a specific transaction. The **Population Selection** group box appears on the run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the set up of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.

If your institution uses a specific selection tool (PS Query, Equation Engine equation, or extended file) to identify IDs for a specific transaction, you must use it.

Several queries have been created as "default" queries. They are:

- SAA_RPT_ACADLEVEL (AA Report Query by Acad Level).
- SAA_RPT_ADVISOR (AA Report Query by Advisor).

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- SAA_RPT_CAREER (AA Report Query by Career).
- SAA_RPT_PROGPLAN (AA Report Query by Plan).
- SAA_RPT_PROGRAM (AA Report Query by Program).
- SAA_RPT_STUDENT_GROUPS (AA Report Query by Student Group).
- SAA_RPT_ADM_CARPROG (AA Report Query by Admission Program).
- SAA_RPT_ADM_PROGPLAN (AA Report Query by Admission Plan).
- SAA_RPT_ADM_SUBPLAN (AA Report Query by Admission Subplan).
- SAA_RPT_PROSPECT_CAR (AA Report Query by Prospect).

See "Using the Population Selection Process" (Campus Community Fundamentals).

Student Select List

Field or Control	*Description*
Use Student Select	Select if you want specific IDs for inclusion in the process. When the **Use Student Select** check box is selected, the **Clear List** button is enabled.
Clear List	Click to remove all values the **Student Select List** group box.

Use Career Simulation

If you select a what-if advisement report type, the Use Career Simulation check box appears on the page. If you then select the check box, additional fields become available for your use. Use those fields to define the parameters of your what-if scenario for the desired population. You can generate what-if reports for students or even prematriculated students (as long as the prematriculated students have an EMPLID).

This example shows the what-if scenario parameters for a population.

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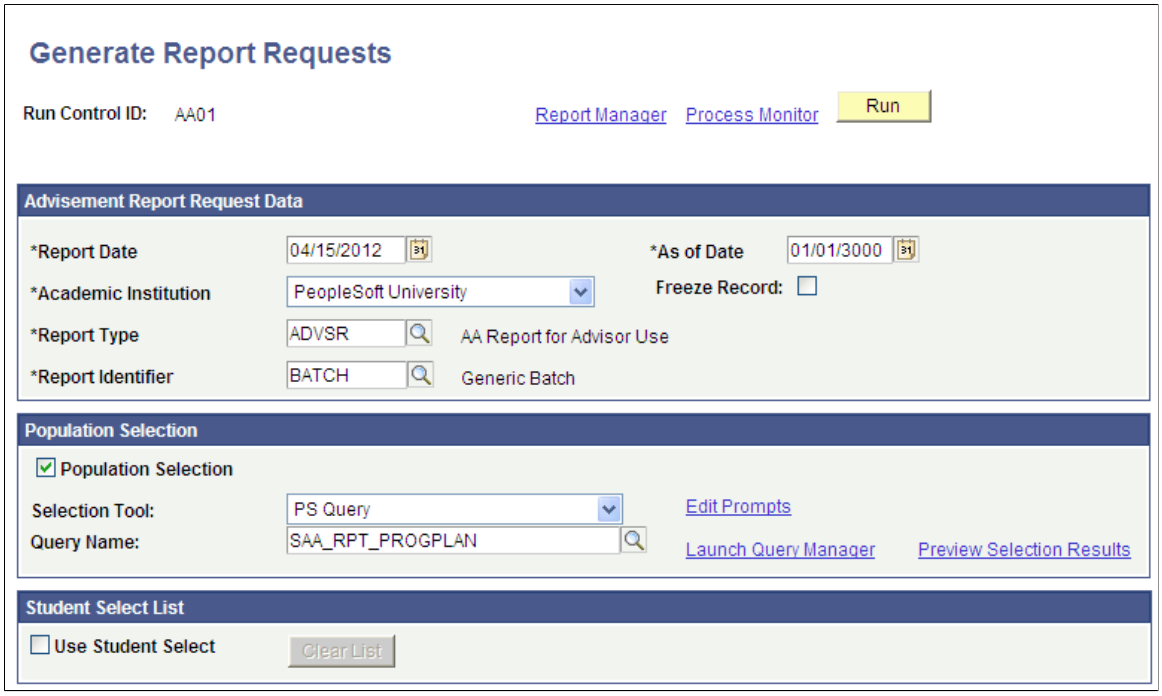
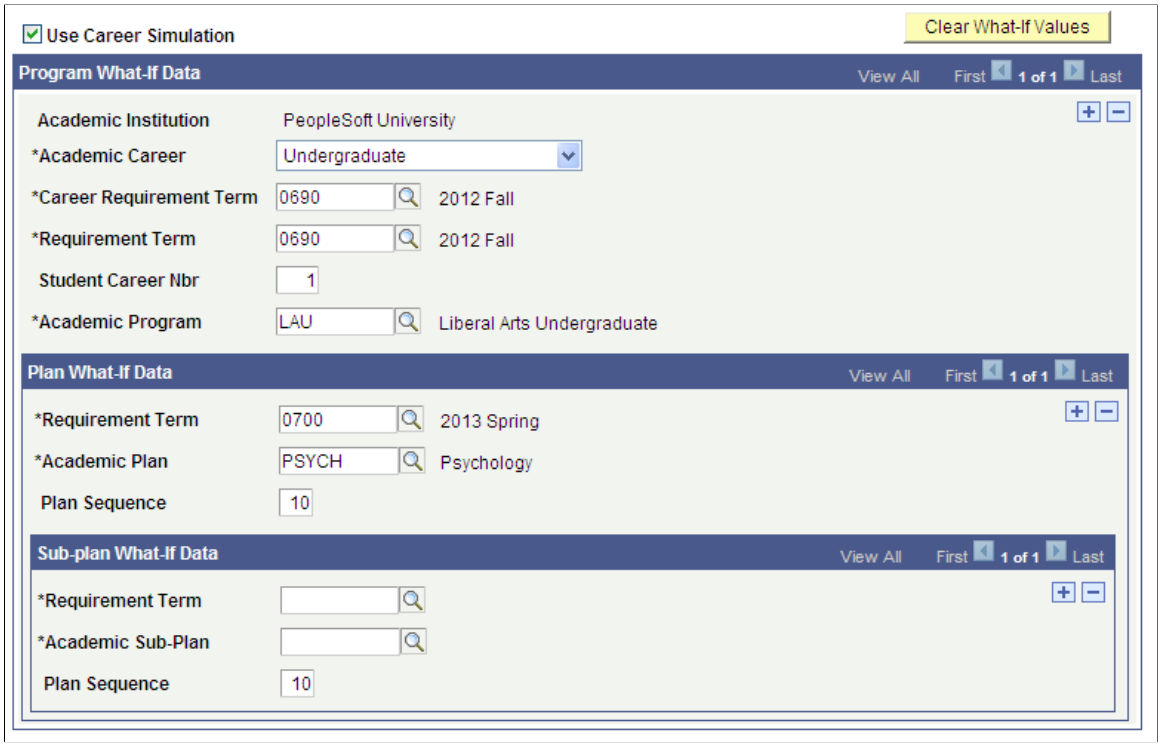
This example illustrates the fields and controls on the Generate Report Requests page with a what-if scenario (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Generate Report Requests page with a what-if scenario (2 of 2). You can find definitions for the fields and controls later on this page.



The following lists the field descriptions for the *Program What-If Data* group box.

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Field or Control	*Description*
Academic Institution	This display-only field shows the institution selected in the Advisement Report Request Data group box.
Academic Career	Enter the value for the what-if career.
Career Requirement Term	Enter a what-if career requirement term value for the career override. The system uses this value to select the correct effective-dated career-level requirement groups.
Requirement Term	Enter the what-if academic program requirement term. The system uses this value to select the appropriate effective-dated program-level requirement groups.
Student Career Number	The default value on this page is 1. You can change the student career number for use in the scenario.
Academic Program	Enter the academic program value that you want to use in the what-if scenario. You can use one or many programs in the what-if scenario.

The following lists the field descriptions for the *Plan What-If Data* group box.

Field or Control	*Description*
Requirement Term	Enter the requirement term for the what-if plan. The system uses this value to select the appropriate effective-dated plan-level requirement groups.
Academic Plan	Enter an academic plan for use in the what-if scenario. The system uses this value to select the correct effective-dated plan-level requirement groups.
Plan Sequence	Displays a sequence number. This sequential number is supplied by the system. This number indicates the order or sequence of multiple plans, if any. The plan with the lowest sequence number is considered primary within the plan. You can override the number.

The following lists the field descriptions for the *Sub-plan What-If Data* group box.

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Field or Control	*Description*
Requirement Term	Enter the requirement term for the what-if subplan. The system uses these values to select the appropriate effective-dated subplan-level requirement groups.
Academic Sub-Plan	Enter an academic subplan for use in the what-if scenario. The system uses this value to select the appropriate effective-dated subplan-level requirement groups.
Plan Sequence	Displays a sequence number. This sequential number is supplied by the system. This number indicates the order (or sequence) of multiple subplans, if any. The subplan with the lowest sequence number is considered primary within the subplan. The user can override the number, if necessary.

Click the Clear What-If Values button to clear values you entered in the Program What-If Data, Plan What-If Data, and Sub-plan What-If Data group boxes.

Generating Batch Advisement Reports

Access the Generate Advisement Reports page (**Academic Advisement** > **Advisement Process** > **Generate Advisement Reports**).

Additional Run Control Parameters

Field or Control	*Description*
From and **To**	Enter a valid date range to filter report requests based on the report date on the individual requests. If no date range is entered, all report dates are considered.

Printing Batch Advisement Reports

Access the Print Batch Reports page (**Academic Advisement** > **Advisement Processes** > **Print Batch Reports**).

Additional Run Control Parameters

Field or Control	*Description*
From Request Date and **To Request Date**	Enter a valid date range to filter report requests based on the report date on the individual requests. If no date range is entered, all report dates are considered.

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Field or Control	*Description*
Report Identifier	Select *Batch*.

Updating Self-Service Advisement Reports

This section provides an overview of the self-service advisement report update process and discusses how to update self-service advisement reports.

Understanding the Self-Service Advisement Report Update Process

Use this update process if your institution wants to generate advisement reports based on the synchronization options on the Installation Academic Advisement (SAA_INSTALL_AA) page. The update process identifies students whose synchronize flag is set to Y and who meet the institution, career, and program parameters identified on the Update Self-Service Advisement Reports page. The process determines whether a report request exists for the self-service report types defined in the Institution Table for a given student. If a request does not exist, one will be created and processed. If a request does exist, the process checks to see if report results are available for the request. If not, then the request will be reprocessed. If results are available, the date/time stamp on the request is compared to the date/time stamp on the STDNT_CAREER record. If the report date/time stamp is earlier than the STDNT_CAREER date/time stamp, the report is regenerated. After both report types are checked, the system sets the synchronization flag to N.

Note: This is the only process that sets the synchronization flag on the student career record back to N.

Page Used to Update Self-Service Advisement Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Update Self Service Reports	SAA_RUNCTL_TRGR	**Academic Advisement** > **Advisement Processes** > **Update Self-Service Reports**	Define the academic institution, academic career, and academic program parameters and update the self-service advisement reports for students. Reset the synchronization flag on the student career record (STDNT_CAREER) to N.

Updating a Self-Service Advisement Report

Access the Update Self-Service Reports page (**Academic Advisement** > **Advisement Processes** > **Update Self-Service Reports**).

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Field or Control	*Description*
Academic Institution	Enter the academic institution for which you want an update.
Academic Career	Enter the academic career for which you want an update.
Academic Program	Enter the program for which you want an update. If you do not enter a value, the process will be applied to all programs within the specified career.

Purging Academic Advisement Reports

This section discusses how to purge academic advisement report results information from the report results tables.

See the product documentation for Understanding Advisement Report Result Tables

Pages Used to Purge Academic Advisement Reports and Records

Page Name	*Definition Name*	*Navigation*	*Usage*
Purge Report Results	SAA_RC_RPT_PURGE	**Academic Advisement** > **Advisement Processes** > **Purge Report Results**	Purge advisement report requests and the data in the results tables. The system deletes advisement report requests and results data within the parameters that you specify.
Process Scheduler Request	PRCSRQSTDLG	Click the **Run** button on the Purge Report Results page.	Initiate purging advisement reports.
Purge Analysis Database Tables page	SAA_RUNCTL_PURGE	**Academic Advisement** > **Advisement Processes** > **Purge Analysis Database Tables**	Initiate purging of data from the analysis database tables based on run control criteria. Optionally purges transcript requests and log data

Purging Academic Advisement Report Results

Generating advisement reports causes a vast amount of data to be inserted into the report results tables. So it is important to remove unnecessary data. Failing to remove unneeded data will waste space in the database and potentially increase processing times.

The Purge Report Results page enables you run a process that removes data from the result tables. You can delete all results table data or some data, based on specific criteria. In addition to deleting the results

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table data, you can delete corresponding report request and log data. To summarize, you can use the options on the page to perform the following actions:

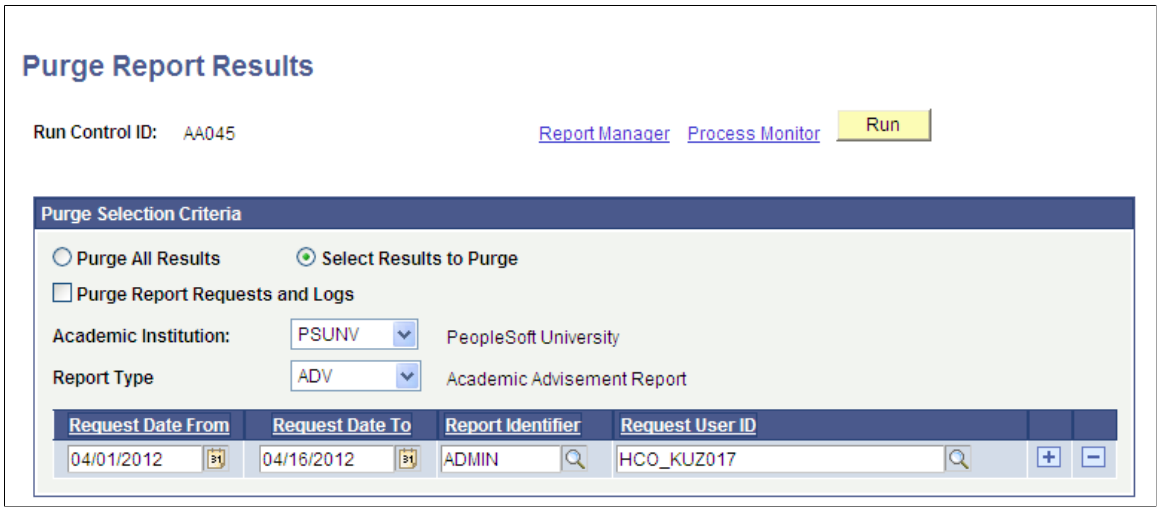
- Purge all data from the results tables and update the report request error log stating that the data has been deleted for the request.
- Purge all data from the report results tables and delete the corresponding report requests.
- Purge some data from the results tables and update the request error log stating that the report results data has been deleted for the request.
- Purge some data from the report results tables and delete the corresponding report request records.

The purge process will generate messages in the message log that track the number of records purged or updated in each table. Note that the message log does not track individual record information, only a summary of the actions for each table. You can write SQL using Query Manager to verify that the process removed the correct data from the report results tables.

When you purge data from the results tables (but not from the report request and log tables), the process adds an entry into the error log for the report request stating that the report results data has been purged.

Access the Purge Report Results page (**Academic Advisement** > **Advisement Processes** > **Purge Report Results**).

This example illustrates the fields and controls on the Purge Report Results page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.

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Field or Control	*Description*
Run	Click to access the Process Scheduler Request page, where you can initiate the purge.

Purge Selection Criteria

Field or Control	*Description*
Purge All Results	Select to delete all data in the results tables. ***Warning!*** Selecting this option will override the **Freeze Record** flag set on the report request record and will delete all data from the results tables. If you also select the **Purge Report Requests and Logs** option, all associated request records will be purged, even if the **Freeze Record** flag is set.
Select Results to Purge	This option is selected by default. When it is selected, additional fields are available on the page so that you can specify the report results that you want to delete. You must select an institution and report type, and then you can select additional parameters, including a range of dates, report identifier, or user ID of the person who requested the reports.
Purge Report Requests and Logs	Select to delete report request records, including logs, along with the selected report results.
Academic Institution	Select the institution for which you want to purge academic advisement reports. This value determines the availability of report types in the **Report Type** field.
Report Type	Select the type of advisement report for which you want to purge reports.
Request Date From and Request Date To	Enter a valid date range to filter report requests based on the report date on the individual report requests. If no values are entered, all report dates are considered.
Report Identifier	Enter the value that identifies the report.
Request User ID	Enter a valid user ID if you want to purge all requests made by a specific user.

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Purging Advisement Transcripts

This section discusses how to purge the advisement transcript results from the analysis database tables. This section also includes information about purging the analysis database tables. If your institution generates advisement transcripts and sends results to the analysis database, you will want to remove unneeded data. The analysis database purge feature enables you to purge both transcript requests and data in the analysis database tables.

See Understanding the Analysis Database

See Producing an Online Academic Advisement Transcript Report

Page Used to Purge Academic Advisement Transcripts

Page Name	*Definition Name*	*Navigation*	*Usage*
Purge Analysis Database Tables	SAA_RUNCTL_PURGE	**Academic Advisement** > **Advisement Processes** > **Purge Analysis Database Tables**	Initiate purging of data from the analysis database tables based on run control criteria. Optionally purges transcript requests and log data.

Purging the Analysis Database

The analysis database enables you to analyze data collected from a batch or individual run of advisement transcripts. Because the process of sending data to the analysis database tables inserts a large amount of data into the database, it is important to remove unnecessary data. Failing to remove unneeded data will waste space in the database and potentially increase processing times.

The Purge Analysis Database Tables page enables you run a process that removes data from the analysis database tables. You can delete all analysis database table data or some data, based on specific criteria. In addition to deleting the analysis database data, you can delete corresponding transcript request and log data. To summarize, you can use the options on the page to perform the following actions:

- Purge all data from the analysis database tables and update the transcript error log stating that the analysis database data has been deleted for the request.
- Purge all data from the analysis database tables and delete the corresponding transcript requests (including headers, details, results, and error log).
- Purge some data from the analysis database tables and update the transcript error log stating that the analysis database data has been deleted for the request.
- Purge some data from the analysis database tables and delete the corresponding transcript request records (including headers, details, results, and error log).

The purge process will generate messages in the message log that track the number of records purged or updated in each table. Note that the message log does not track individual record information, only a summary of the actions for each table. You can write SQL using Query Manager to verify that the process removed the correct data from the analysis database tables.

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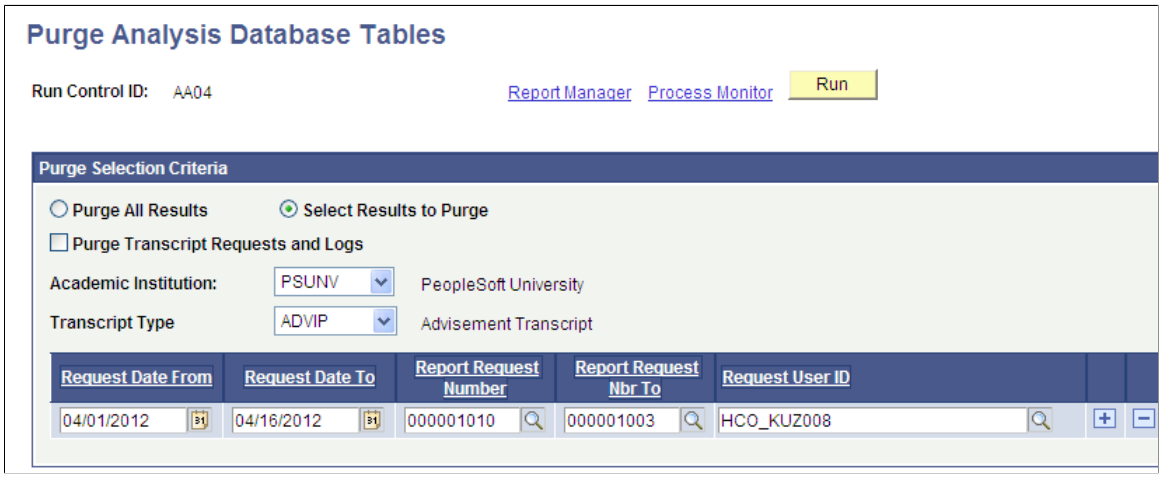
When you purge data from the analysis database (but not from the transcript request and log tables), the process adds an entry into the error log for the transcript request stating that the analysis database data has been purged.

Access the Purge Analysis Database Tables page (**Academic Advisement** > **Advisement Processes** > **Purge Analysis Database Tables**).

This example illustrates the fields and controls on the Purge Analysis Database Tables page . You can find definitions for the fields and controls later on this page.



Purge Selection Criteria

Field or Control	*Description*
Purge All Results	Select to delete all results in the Analysis Database. ***Warning!*** Selecting this option will override the Freeze Record flag set on the report request record and will delete all data from the analysis database tables. If you also select the Purge Transcript Requests and Logs option, all associated transcript request records will also be purged, even if the Freeze Record flag is set.
Select Results to Purge	This option is selected by default. After selecting this option, enter your selection criteria. **Note:** If you select this option, the process obeys the Freeze Record flag set on the transcript request record.
Purge Transcript Requests and Logs	Select to delete transcript requests and logs in addition to purging the analysis database table data. If the analysis database data is already purged, you cannot go back and select this check box and rerun the purge process.

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Field or Control	*Description*
Academic Institution	Select the institution for which you want to purge academic advisement reports (transcripts). This value determines the availability of report types in the Transcript Type field.
Transcript Type	Select the type of transcript (advising, for example) for which you want to purge data.
Request Date From and Request Date To	Enter a valid date range to filter report requests based on the report date on the individual requests. If no values are entered, all report dates are considered.
Report Request Number and Report Request Number To	Enter values in these fields to specify purge parameters in more detail. The system purges report requests for these report request numbers.
Request User ID	Enter a valid user ID if you want to purge all requests that were created by a specific user.

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Chapter 11

Reviewing the Requirement Group, Requirement, and 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 Student Records, where you can view enrollment requirement group rules.

Related Links

"Viewing Enrollment Requisite Summary Information" (Student Records)

Pages Used to Review Academic Requirement Group Summaries

Page Name	*Definition Name*	*Navigation*	*Usage*
Requirement Group Summary	ADVIS_RQ_GRP_SUMM	**Academic Advisement** > **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 Advisement** > **Summaries** > **Academic Requirement Groups.** Click the requirement group name.	Review the description of the academic requirement group.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Requirement Summary	ADVIS_RQ_SUMMARY	**Academic Advisement** > **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 Advisement** > **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 Advisement** > **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.

Related Links

Setting Up Academic Requirements

"Viewing Enrollment Requisite Summary Information" (Student Records)

Reviewing Academic Requirement Group Summaries

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Reviewing Advisement Course List Summaries

Use the Academic Course Lists 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 Student Records, where you can view enrollment course list details.

Related Links

"Viewing Enrollment Requisite Summary Information" (Student Records)
Setting Up Academic Course Lists
"Defining Enrollment Course Lists" (Student Records)

Pages Used to Review Advisement Course List Summaries

Page Name	*Definition Name*	*Navigation*	*Usage*
Course List Summary	RQ_COURSELIST_SUMM	**Academic Advisement** > **Summaries** > **Academic Course Lists**	View a summary of a specific academic course list.
Course Description	CLST_SUMM_DESC	**Academic Advisement** > **Summaries** > **Academic Course Lists** Click a specific course.	View the course description for a specific course ID on an academic course list.

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Chapter 12

Sharing Courses

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.

Related Links

Setting Up Academic Requirement Groups

Setting Up Course Share Sets

This section discusses how to establish set up course share sets and provides a course share set example.

You complete these steps to share courses:

1. Define as many course share sets as necessary on the Define 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.

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Page Used to Set Up Course Share Sets

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Course Share Sets	CRSE_SHARE_SET	**Academic Advisement** > **Academic Requirements** > **Define Course Share Sets**	Establish a course share set number. You enter the course share set number to two or more requirement groups to allow them to share courses.

Establishing Course Share Sets

Access the Define Course Share Sets page (**Academic Advisement** > **Academic Requirements** > **Define Course Share Sets**).

Field or Control	*Description*
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 that are established in the Academic Requirements component. You are not required to enter a value in the **Requirement** field. If no value is entered, then no restriction exists for 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. For sharing to take effect, more than one group must be listed.

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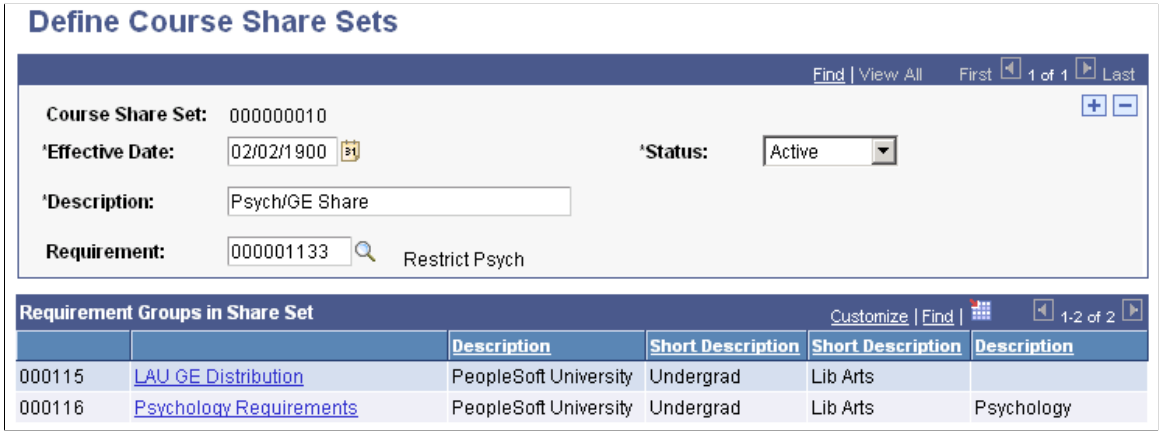
Note: After you establish and use a course share set on the Requirement Group Parameters page, the requirement groups that are affected are listed on the Course Share Sets page under the appropriate course share set.

Example: Course Set Sharing

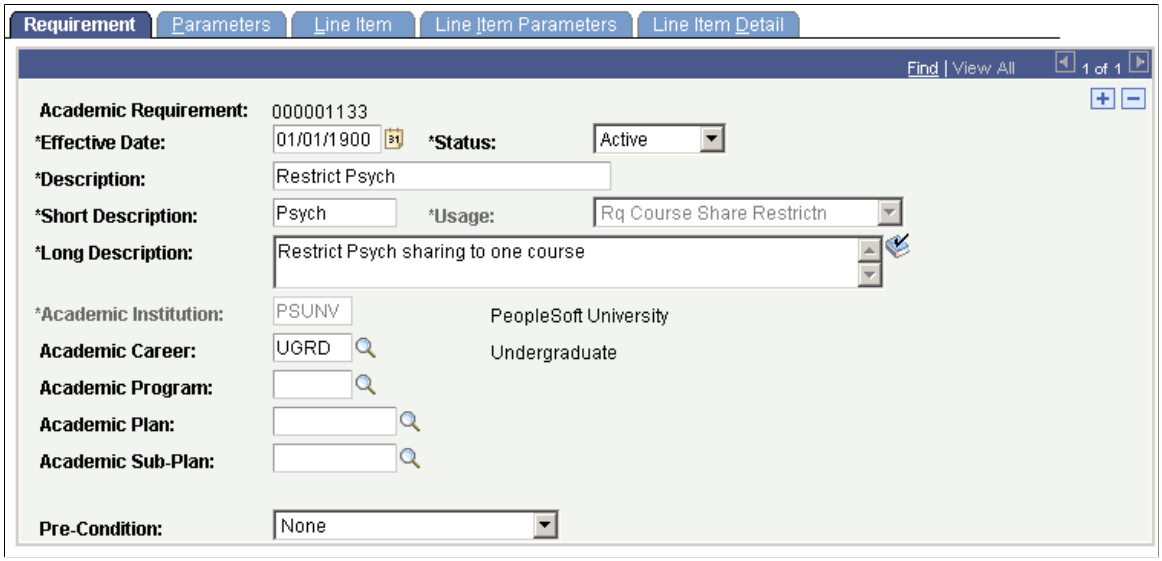
In this example, requirement 1133 restricts course sharing for course share set 10:

This example illustrates the fields and controls on the Define Course Share Sets page. You can find definitions for the fields and controls later on this page.



In this example, academic requirement 1133 restricts psychology sharing to one course:

This example illustrates the fields and controls on the Requirement page . You can find definitions for the fields and controls later on this page.



This requirement contains one requirement line. Requirement course share restriction usage can use one line type only: *Unit, Course,* or *GPA Limit.*

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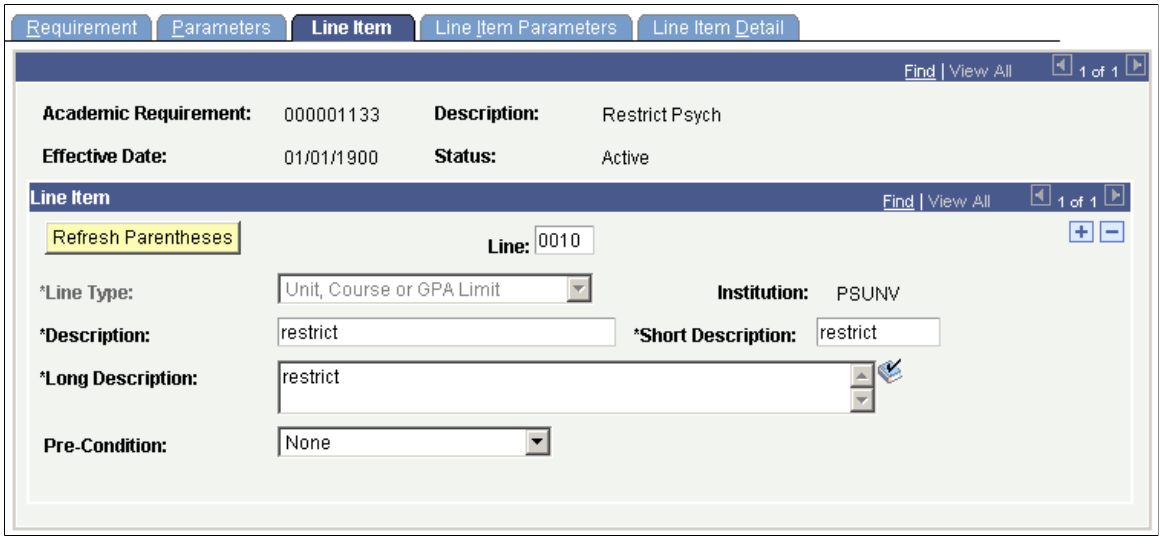
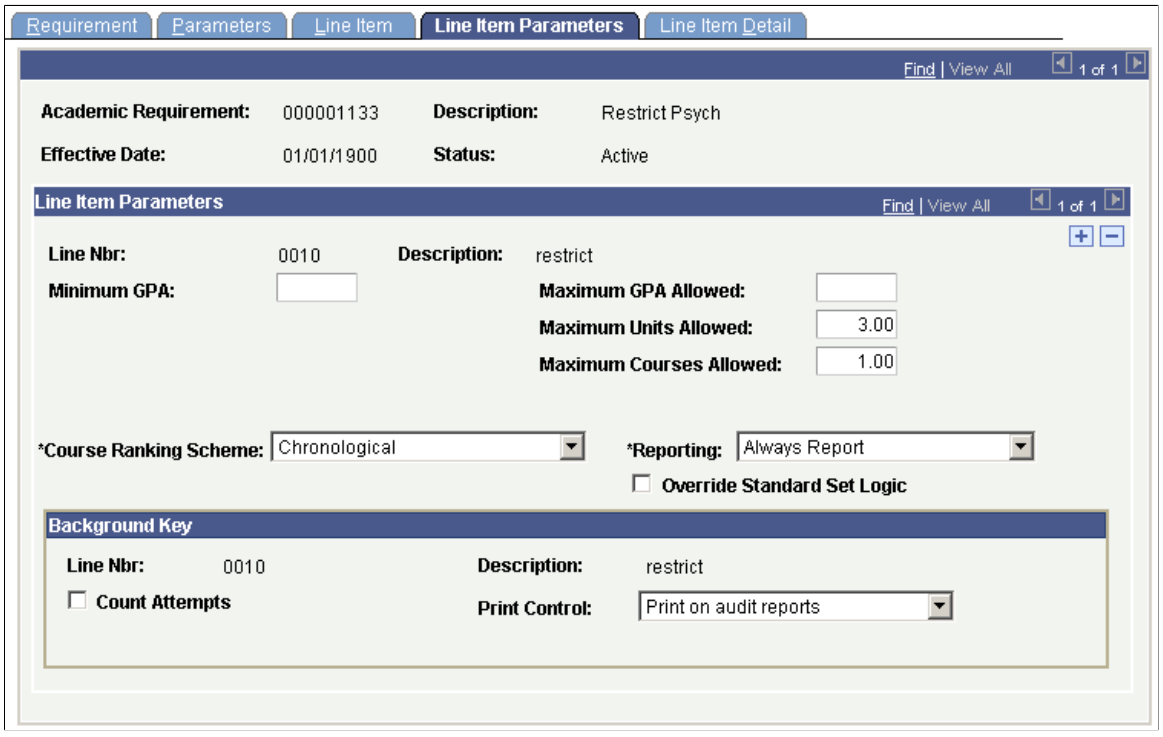
This example illustrates the fields and controls on the Line Item page . You can find definitions for the fields and controls later on this page.



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.

This example illustrates the fields and controls on the Line Item Parameters page . You can find definitions for the fields and controls later on this 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:

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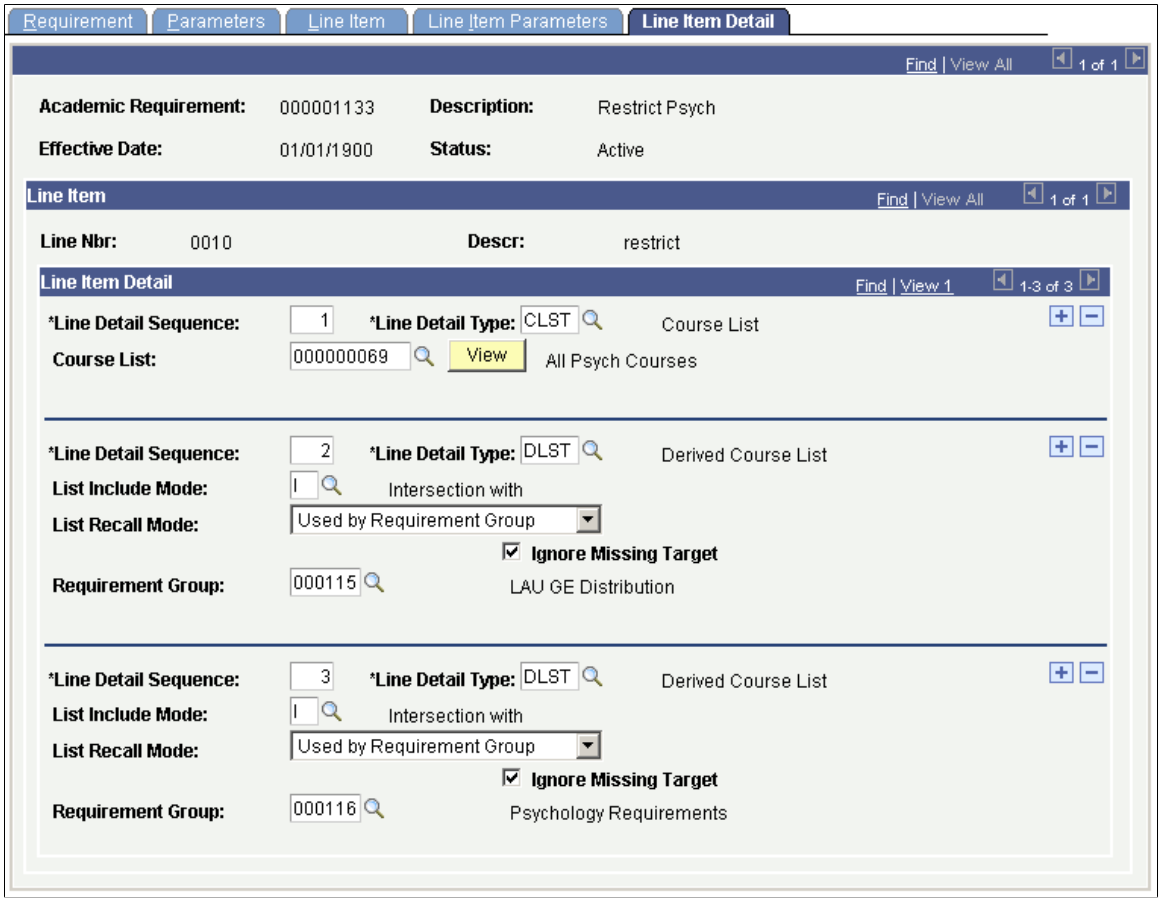
This example illustrates the fields and controls on the Line Item Detail page . You can find definitions for the fields and controls later on this page.



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, then 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.

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Chapter 13

Using Advisement Overrides and 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 pre-approved so that it is automatically calculated in the Fall session.

You can make academic advisement exceptions for a student in one of three ways:

- 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 for Using Advisement Overrides and Course Substitutions

Before you begin, you must set up these items:

- Academic course lists.

- Academic requirements.

- Academic requirement groups.

Related Links

Setting Up Academic Course Lists

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Setting Up Academic Requirements
Setting Up Academic Requirement Groups

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.

Understanding Course Directive and Advisement Override Setup

Use the Authorize Student Exceptions page 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	*Definition Name*	*Navigation*	*Usage*
Authorize Student Exceptions	AA_OVERRIDE	**Academic Advisement** > **Student Advisement** > **Authorize Student Exceptions**	Create an advisement override.
Exception Detail	AA_RQRMNT_GRP_INFO	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 (**Academic Advisement** > **Student Advisement** > **Authorize Student Exceptions**).

When a user attempts to set up an exception to his own ID using the Authorize Student Exceptions component he receives an error message warning him that he is not permitted to do so. Specifically, when the operator's ID (emplid) is the same as the ID (emplid) selected, the operator receives an error message indicating that he is not authorized to create a student exception for himself.

Note: The system uses overridden data for the degree audit report only. Original data that you recorded for the other PeopleSoft Campus Solutions pages remains unchanged.

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Field or Control	*Description*
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 before 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, then the override will not be in effect and will be ignored. For example, if the effective date is *01/01/2001* and the as-of-date value is *09/19/2000,* then 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.

Override Details

Field or Control	*Description*
Academic Institution	Select the academic institution that is affected by this advisement override. Each advisement override is associated with only one academic institution. 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.

Field or Control	*Description*
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.

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Field or Control	*Description*
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 are: *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, if you select *Student Group* as the selection code, then the only values available in the **Selection Data** field will be student groups. If you select *Student*as the selection code, then only the student's ID can be entered in the **Selection Data** field.

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Field or Control	*Description*
Operation Code	Select the operation code that indicates the type of advisement override. Values are: *Course Directive:* 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 rather than a general education requirement. *Requirement Change:* Indicates that the override acts as a change to a specific requirement. *Requirement Override:* Indicates that you can override a specific requirement with a student individualized plan requirement. *Requirement Waiver:* 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*. A value of *LN* indicates that the operation code works at the requirement line level. A value of *RG* indicates that the operation code works at the requirement group level. A value of *RQ* indicates that the operation code works at the requirement level.
Create Exception	Click to access the Exception Detail page, where you can record the specifics of an advisement override. The **Earned Credit Only** check box is enabled when you select the corresponding option in the **Earned Credit Option** field on the Academic Institution 7 page. This lets you choose whether to include or exclude unearned credit for each student exception. See "Identifying Self-Service Report Types" (Campus Solutions Application Fundamentals).

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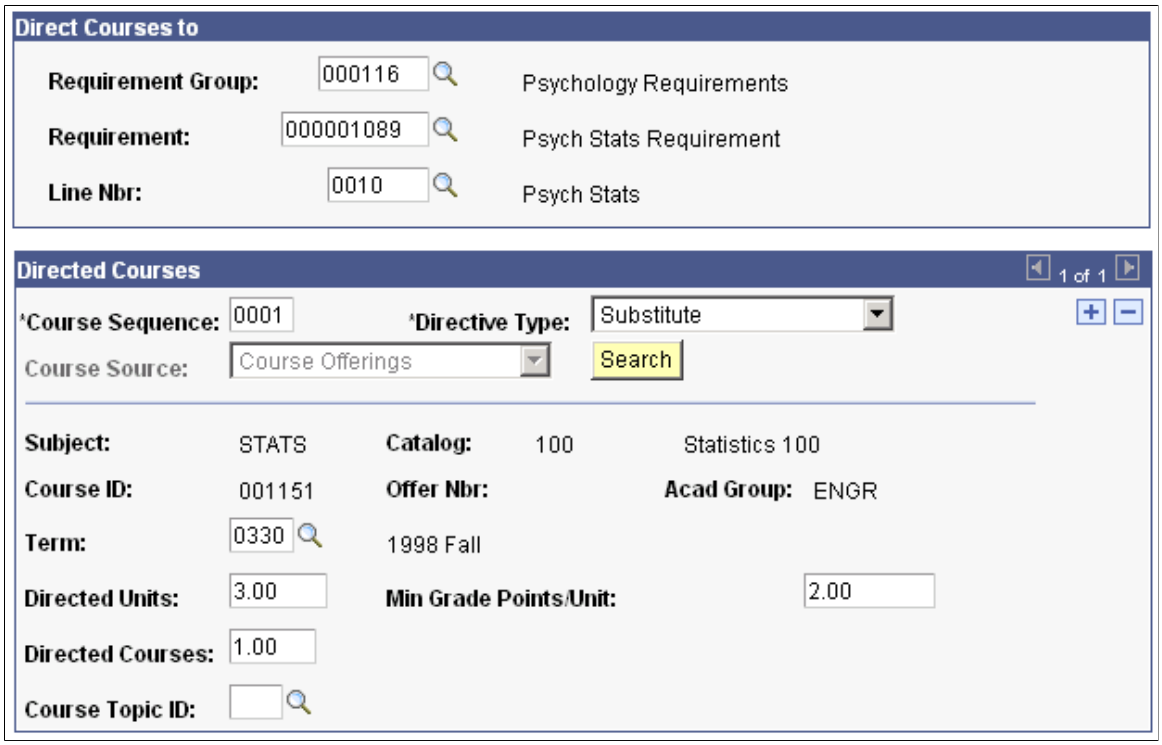
Creating Override Details

Access the Exception Detail page (click the **Create Exception** link on the Authorize Student Exceptions page).

This example illustrates the fields and controls on the Exception Detail page. You can find definitions for the fields and controls later on this page.



Enter the 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. That is, 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, if, on the Authorize Student Exceptions page, you enter values for academic institution, academic career, academic program, and academic plan, then 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.

Directed Courses

This group box may not contain any fields, 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 in this group box.

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Directed Courses

Field or Control	*Description*
Directive Type	Select the directive type. Values are: *Substitute:* Select to replace one course for another. *Exclude:* Select to exclude courses from being used in the degree audit. The information that you enter on the Exception Detail page dictates which courses are excluded.
Course Source	Select the value that represents the courses from which to select the substitution. Values are: *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 value is the default. When the selection code on the Authorize Student Exceptions page is *Primary Academic Plan, Academic Program,* or *Student Group,* then *Offering* is the only available course source. *Enrollment, Other Credit, Test Credit,*and *Transfer Courses:* 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.*

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Field or Control	*Description*
Search	Click to access the Student Course Directive Search page, where you enter 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 a model, group, and sequence number for transfer, test, and other credit. Unit earned, grades, and requirement designation values are also noted in the search record. **Note:** When the course source is *Offerings,* you must enter a subject area before clicking the **Search** button on the Student Course Directive Search page. However, when the course source is another value, you do not need to enter a subject area. Instead, click the **Search** button and the system will return 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 not available when the course source is *Othr Cred, Test Cred,* or *Transfer.* A value in this field is optional.

Example: Waiving a Requirement

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.

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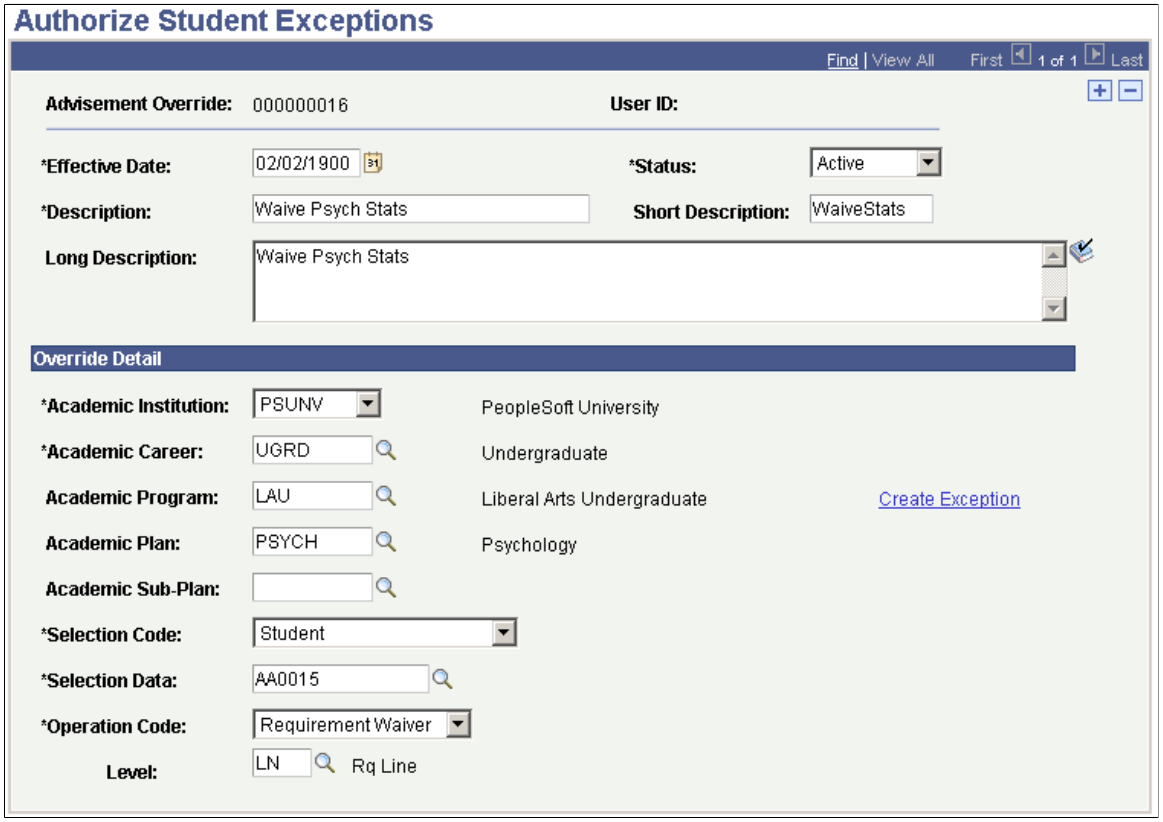
- Enter *Requirement Waiver* as the operation code.
- Enter *LN* in the **Level** field.

This example illustrates the fields and controls on the Authorize Student Exceptions page to waive a requirement. You can find definitions for the fields and controls later on this page.



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.

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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, you must first transfer the course into the target career and then make the substitution.

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 a future term. If the student never takes the course, the substitution is not processed.

Once a course is identified as a substitute for another course, its former identity no longer exists. The course substitution process 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 that the course 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.

Related Links

Producing Quick What-If and Stored What-If Advisement Reports

Page Used to Define Course Substitutions

Page Name	*Definition Name*	*Navigation*	*Usage*
Course Substitution	STDNT_CRS_SUBS	**Academic Advisement** > **Student Advisement** > **Create Course Substitution**	Substitute one course for another course.

Setting Up Course Substitutions

Access the Course Substitution page (**Academic Advisement** > **Student Advisement** > **Create Course Substitution**).

Field or Control	*Description*
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 the course substitution. This value is a sequential number that is automatically assigned by the system. The user can override this value, but he or she should not do so. Each substitution sequence number reflects one course substitution. A student can have multiple course substitutions.

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Field or Control	*Description*
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: *Course Offerings:* Includes all of the courses. There are no career or enrollment restrictions on which courses are available. *Enrollment:* 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. *Other Credit, Test Credit,* or *Transfer Courses:* 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 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.

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Chapter 14

Creating and Using Expanded Conditions and Custom Conditions

Defining Expanded Conditions

This section provides an overview of dynamic conditions and discusses how to:

- 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. When you want to use an entity group in a precondition or condition in a requirement or requirement group, you must use the operator of In or Not In.

Dynamic conditions are multiple (groups of) conditions or multi-dimensional condition values. For example, you could create a dynamic condition that requires academic plan = psych AND cumulative GPA > 3.0. You can use dynamic conditions as preconditions or conditions in academic requirements and requirement groups.

Dynamic conditions can be "standard" or "user programmable." A standard condition might be, for example, of the following: student group equals ESL or International. This multiple or *dynamic* condition might then be used as a precondition in a degree requirement. User programmable conditions consist of milestones, external degrees, or internal degrees. For example, you can create a condition that requires a milestone whereby students must complete an art portfolio as a requirement for graduation.

Note: You can also create dynamic conditions for use in enrollment requisites.

See "Defining Requisite Conditions (Optional)" (Student Records).

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Pages Used to Define Expanded Conditions

Page Name	*Definition Name*	*Navigation*	*Usage*
Define an Entity Group	AA_IN_CONDITION1	**Academic Advisement** > **Academic Requirements** > **Define an Entity Group**	Define the academic entity group to be used as a precondition or condition requirement.
Define Dynamic Condition	RQ_CONDITION	**Academic Advisement** > **Academic Requirements** > **Define Dynamic Condition**	Create a condition specification.

Defining Academic Entity Groups

Access the Define an Entity Group page (**Academic Advisement** > **Academic Requirements** > **Define an Entity Group**).

Field or Control	*Description*
Academic Entity Group	This arbitrary number is unique for each entity group. It can be used as a precondition or condition
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.

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Field or Control	*Description*
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 subplans.

Entity Group Item Detail

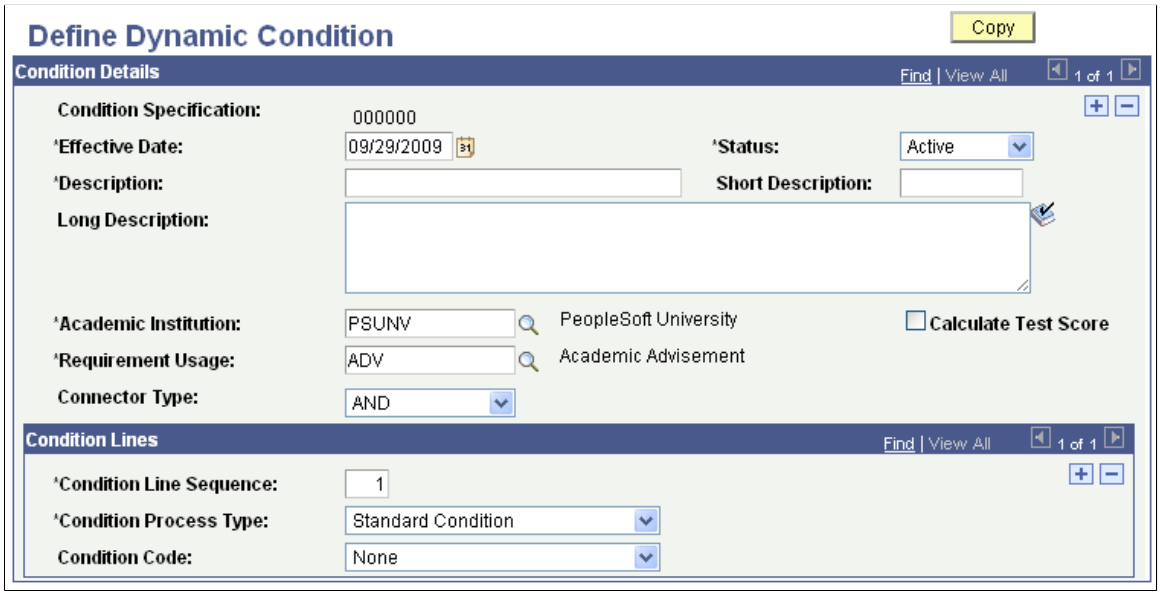
Lists the details (entities) in this academic entity group. An entity group item number is a sequential line number that the system automatically assigns to each item in the entity group. The user can override the number. The system automatically supplies the description.

Defining Dynamic Conditions

Access the Define Dynamic Condition page (**Academic Advisement** > **Academic Requirements** > **Define Dynamic Condition**).

The appearance and functionality of this page changes, depending on whether you access it in Add mode or Update/Display mode.

This example illustrates the fields and controls on the Define Dynamic Condition page: Add mode. You can find definitions for the fields and controls later on this 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 academic level = freshman and cum GPA>=2.0. Dynamic condition #2 equals sophomore and cum GPA>=2.5. Dynamic condition #3 equals dynamic condition #1 OR dynamic condition #2.

Field or Control	***Description***
Condition Specification	This arbitrary number is unique for each condition specification. You can use this condition specification as a precondition or as a 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 in the requirement group and requirement summaries, the advisement requirement report, the advisement requirement group report, and the reverse engineering report. When the dynamic condition is used as a condition in an academic requirement or academic requirement group, and if print controls dictate, the description prints on the advisement report, .pdf, and advisement transcript. The exception to this for the advisement report and .pdf is if the Condition Description field on the requirement's line item detail is populated. In that case, the condition description appears on the advisement report and .pdf.
Short Description and **Long Description**	Enter descriptions for the condition specification that you want to establish. These descriptions are used for documentation purposes only.
Academic Institution	Select the academic institution. Each condition specification is associated with only one academic institution.
Requirement Usage	Select the requirement usage that is relevant to the dynamic condition. A dynamic condition can be used only in requirement groups and requirements that share the same usage value.
Connector Type	Select the main connector type for this condition specification. Values are: *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.

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Field or Control	*Description*
Condition Line Sequence	This number indicates the order in which the condition lines are evaluated. The condition line sequence number is automatically assigned, but it the user can override it.
Condition Process Type	Select a condition process type. Values are: *Standard Condition:* Indicates that the condition is one of the delivered, standard conditions. This is the default field value. If you use this type, then the condition code field is available. *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.

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Field or Control	*Description*
Condition Code	If you select the **Condition Process Type** field value of *Standard Condition,* then select one of the following delivered translate values: *None:* Indicates no field value. *Academic Level:* 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. *Academic Plan:* Indicates the area of study, for example, a major or minor within the academic program. Some plans are subdivided into sub-plans. *Academic Plan* and *Primary Academic Plan* reference the exact same plan when the student has one plan only. *Academic Plans:* Indicates that all of a student's plans are part of the equation. *Academic Program:* Indicates the program of study to which a student applies and is admitted. *Academic Program* and *Primary Academic Program* reference the exact same program when the student has one program only. *Academic Programs:* Indicates that all of a student's academic programs are part of the equation. *Academic Standing:* 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. *Academic Sub-Plan:* Indicates a further specialization within the academic plan. *Academic Sub-Plans:* Indicates that all of a student's sub-plans are part of the equation. *Cumulative Grade Point Average:* A student's cumulative grade point average (derived from the students term history cumulative statistics, in conjunction with the processing as of date). *Dynamic Condition:* Indicates a dynamic condition that has been previously created in the Define Dynamic Condition component. *Primary Academic Plan:* 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.

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Field or Control	*Description*
	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. *Test Score:* Select to use a test score as a condition. If you select this field value, the following additional fields appear: **Test ID, Test Component, Condition Operator, Test Score, Months Valid,** and **Test Score Method. Months Valid** and **Test Score Method** are editable according to the setup on the Define Tests for Advisement page. If you select *User Programmable Condition,* the **Condition Process Identifier** field becomes available. Select 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. *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.

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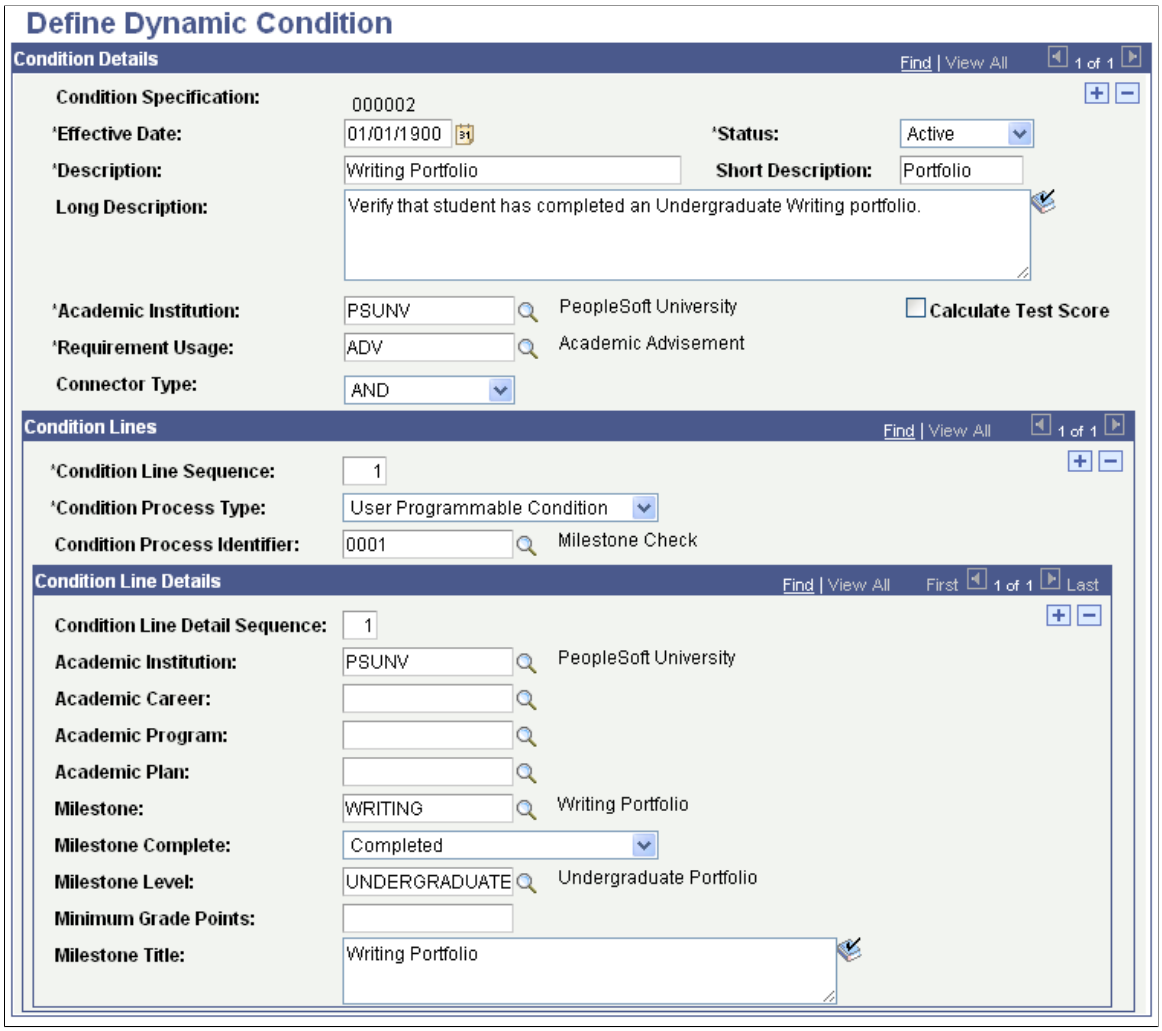
This example illustrates the fields and controls on the Define Dynamic Condition page: Update/Display mode. You can find definitions for the fields and controls later on this page.



If you select the **Condition Process Type** of *User Programmable Condition,* and the **Condition Process Identifier** of *Milestone Check,* then additional fields become available. Use these to specify the details about the milestone for use in this dynamic condition.

Field or Control	***Description***
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.

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Field or Control	*Description*
Academic Plan	If applicable, enter the academic plan that is associated with this condition line detail.
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: *None:* Indicates that the field is not applicable. *Completed:* Indicates that the student must complete this milestone to satisfy the condition line detail. *In Progress:* Indicates that the student must be working towards completing the milestone to satisfy the condition line detail. *Not Completed:* 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 phase as the milestone title. This field does not appear on the advisement report or advisement transcript. Use this field for documentation purposes only.

If you select a **Condition Process Type** of *User Programmable Condition* and a **Condition Process Identifier** selected is *External Degree Check* or *Internal Degree Check,* then you must select a **Degree.**

Field or Control	*Description*
Degree	Enter the degree that must be obtained to satisfy the condition line.

If you select a **Condition Process Type** of *Standard Condition* and a **Condition Code** of *Test Score,* additional fields become available.

Field or Control	*Description*
Test ID	Select a Test ID from those defined on the Define Advisement Tests page.

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Field or Control	*Description*
Test Component	The selection options are based on the **Test ID** selected.
Condition Operator	Identifies what type of comparison is to be applied to the condition data. Possible condition operators include: None, Less or Equal, Greater or Equal, Equal, Greater Than, Less Than, and Not Equal. 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.
Test Score	Enter a score required for the test component and condition operator selected.
Months Valid	The value indicates the number of months for which a test score is valid. An empty (blank) field is interpreted to mean that the test is always valid. This field is available for editing based on the setup on the Define Tests for Advisement page.
Test Score Method	The method works with the **Months Valid** value. For example, if you select the method of *Highest Score,* the system uses the highest test score within the valid number of months. Values are: *Average of All Scores Taken:* Select to have the advisement engine average scores when it processes the tests for a precondition or condition in an academic requirement or requirement group. *First Test Taken:* Select to have the advisement engine use the test score with the earliest date when it processes the tests for a precondition or condition in an academic requirement or requirement group. *Highest Score:* Select to have the advisement engine use the highest score for a given test when it processes the tests for a precondition or condition in an academic requirement or requirement group. *Last Test Taken:* Select to have the advisement engine use the score from the date of the last test taken when it processes the tests for a precondition or condition in an academic requirement or requirement group. *Lowest Score:* Select to have the advisement engine use the lowest score for a given test when it processes the tests for a precondition or condition in an academic requirement or requirement group.

When you select the **Calculate Test Score** check box, other fields become available so that you can define the details of the calculation to be performed when the dynamic condition is used in an academic requirement or academic requirement group.

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Field or Control	*Description*
Test Component Taken Option	This field appears in the Condition Details group box only when the **Calculate Test Score** check box is selected. Valid values are: *Tests Taken on Different Dates* and *Tests Taken on Same Date.*
Test ID	This field appears in the Condition Details group box only when the **Calculate Test Score** check box is selected. These prompt from the Test IDs defined on the Define Advisement Tests page.
Condition Operator	This field appears in the Condition Details group box only when the **Calculate Test Score** check box is selected. The field identifies what type of comparison is to be applied to the condition data. Possible condition operators include: *None, Less or Equal, Greater or Equal, Equal, Greater Than, Less Than,* and *Not Equal.* 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.
Calculation Method	This field appears in the Condition Details group box only when the **Calculate Test Score** check box is selected. Valid values are: *Average of the Components* and *Sum of the Components.*
Score Required	This field appears in the Condition Details group box only when the **Calculate Test Score** check box is selected. Enter a valid score required as it relates to the values selected in the preceding fields.
Months Valid	This field appears in the Condition Details group box only when the **Calculate Test Score** check box is selected. This field is available for editing based on the setup on the Define Tests for Advisement page. The value indicates the number of months for which a test score is valid. An empty (blank) field is interpreted to mean that the test is always valid.

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Field or Control	*Description*
Test Score Method	The method works with the **Months Valid** value. For example, if you select the method of *Highest Score,* the system uses the highest test score within the valid number of months. This field appears in the Condition Details group box only when the **Calculate Test Score** check box is selected. Values are: *Average of All Scores Taken:* Select to have the advisement engine average scores when it processes the tests for a precondition or condition in an academic requirement or requirement group. *First Test Taken*: Select to have the advisement engine use the test score with the earliest date when it processes the tests for a precondition or condition in an academic requirement or requirement group. *Highest Score:* Select to have the advisement engine use the highest score for a given test when it processes the tests for a precondition or condition in an academic requirement or requirement group. *Last Test Taken:* Select to have the advisement engine use the score from the date of the last test taken when it processes the tests for a precondition or condition in an academic requirement or requirement group. *Lowest Score:* Select to have the advisement engine use the lowest score for a given test when it processes the tests for a precondition or condition in an academic requirement or requirement group.
Condition Line Sequence	Appears by default, starting with the number 1. Each condition line must have a unique condition line sequence value.
Test Component	This field appears in the Condition Lines group box only when the **Calculate Test Score** check box is selected. The selection options are based on the **Test ID** selected.
Minimum Score	This field appears in the Condition Lines group box only when the **Calculate Test Score** check box is selected. Enter the minimum acceptable score for the test component identified for the condition line sequence.

Defining Custom Conditions

This section provides an overview of custom conditions and discusses how to define custom condition processes.

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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 (such as 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.
```

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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 are subject to change.

To create custom conditions:

1. With the assistance of a developer, create a customized process.
2. Create a new condition process identifier using the Define 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 Define Dynamic Condition page.

   Set up the condition line sequence detail as appropriate. The fields that are available for your entry in the Condition Line Details group box depend on the process key format value that you selected on the Define Condition Processes page. Also, the number of condition line detail sequences that you define must correspond with the required key count that you identified on the Condition Processes page.

Page Used to Set Up Custom Conditions

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Condition Processes	CONDITION_PROC_TBL	**Academic Advisement** > **Academic Requirements** > **Define Condition Processes**	Establish custom condition processes.

Defining Custom Condition Processes

Access the Define Condition Processes page (**Academic Advisement** > **Academic Requirements** > **Define Condition Processes**).

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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.

Field or Control	*Description*
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: These condition process identifiers are delivered with the system: 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.

Field or Control	*Description*
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 *Cobol Process.*
Logical Name	Enter the logical name of the program that is called for this specific condition process identifier.
Process Key Format	Select the process key format that controls what fields are available on the Define Dynamic Condition page. This field value also determines which logical name is called. Values are: *TYP1 Program Key:* Provides the keys (values) needed to run the program. This is the default value. *TYP2 Milestone Key:* Provides the keys (values) needed to define and validate a milestone. *TYP3 Internal Degree:* Provides the keys (values) needed to define an internal degree as required. *TYP4 External Degree:* Provides the keys (values) needed to define an external degree as required.
Ignore Key Count	Select if the number of key values (or rows) on the Define Dynamic Condition page is irrelevant. The **Required Key Count** field becomes unavailable for edit.

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Field or Control	*Description*
Required Key Count	Enter the number of key values (or rows) that must be entered in the Condition Line Details group box on the Define Dynamic Conditions page. If you do not enter a key count value, then no entries are permitted. For example, suppose that the required key count is *4,* then there must be four rows (condition line detail sequences) on the corresponding Define Dynamic Condition page.

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Chapter 15

Maintaining Academic Advisement Setup Data

Prerequisite for Maintaining Academic Advisement Setup Data

Before you produce setup data reports, you must set up academic advisement data in your system.

Related Links

Setting Up Academic Course Lists
Setting Up Academic Requirements
Setting Up Academic Requirement Groups
Defining Custom Conditions
Defining Expanded Conditions

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. Enter the academic requirement group or enter other general parameters and print options on the Advisement Group Summary Report page.
2. Click the **Run** button to process the report.

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Page Used to Produce an Advisement Group Summary Report

Page Name	*Definition Name*	*Navigation*	*Usage*
Advisement Group Summary	RUNCTL_SRGRPADV	**Academic Advisement** > **Advisement 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.

Generating an Advisement Group Summary Report

Access the Advisement Group Summary page (**Academic Advisement** > **Advisement Reports** > **Academic Requirement Group**).

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.

Field or Control	*Description*
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.

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Field or Control	*Description*
Academic Institution	Enter 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 *all* 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 are: *None:* Indicates that the field is not used as a limiting parameter. This value appears by default. *Academic Advisement:* Indicates that requirement groups with a usage of academic advisement are included in the report. *Student Individualized Plan:* 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.

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Field or Control	*Description*
Honor Blank Values	Select 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.

Description Options

These fields enable you to control how descriptions are presented in the summary report. If you leave any field values blank, then the system creates the report using the *Standard* selection option.

Field or Control	*Description*
Print Group Level	Select the print group level that governs the type of requirement group description that is included in the report. Values are: *All:* Indicates that all of the descriptions (search description, long description, report description, and report long description) on the Requirement Group page print on the report. *Catalog:* Indicates that the report long description on the Requirement Group page prints on the report. *Excpt Cat:* Indicates that all of the descriptions on the Requirement Group page print on the report. *Long:* Indicates that the long description and the report long description on the Requirement Group page print on the report. *Standard:* Indicates that the search description and the report description on the Requirement Group page print 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.

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Field or Control	*Description*
Print Requirement Level	Enter the print requirement level that governs the type of requirement description that is included in the report. Values are: *All:* Indicates that all five of the descriptions (search, short search, report, long, and report long descriptions) on the Requirement page print on the report. *Long:* Indicates that the long description and the report long description on the Requirement page print on the report. *Standard:* Indicates that the search description and report description on the Requirement page print 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 are: *All:* Indicates that all five of the descriptions (search descriptions, the long description, and the two report descriptions) on the Requirement Line Item page print on the report. *Long:* Indicates that the long description and the report long description on the Requirement Line Item page print on the report. *Standard:* Indicates that the search description and the report description on the Requirement Line Item page print 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.

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Field or Control	*Description*
Print Course Level	Select the print course level that governs the type of course description that is included in the report. Values are: *All:* Indicates that all of the 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.

Detail Options

Enables you to control how details are presented in the summary report.

Field or Control	*Description*
Print Group Level	Select to print the requirement group detail on the report. If the check box is clear, no group detail prints.
Print Requirement Level	Select to print the requirement detail on the report. If the check box is clear, no requirement detail prints.
Print Line Level	Select to print the line detail on the report. If the check box is clear, no line detail prints.

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Field or Control	*Description*
Course List Detail Level	Select how the course list detail should appear in the report. Values are: *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 only the course list prints on the report. *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 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.

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Page Used to Produce a Database Tables Report

Page Name	*Definition Name*	*Navigation*	*Usage*
Database Tables Report	RUNCTL_SRDBTBLS	**Academic Advisement** > **Advisement 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 (**Academic Advisement** > **Advisement Reports** > **Database Tables**).

Field or Control	*Description*
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	Enter the report. Values are: *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.

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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.

Page Used to Produce Entity Group Table and Condition Table Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Entity Group Table and Condition Table Reports	RUNCTL_SRMISRPT	**Academic Advisement** > **Advisement 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 (**Academic Advisement** > **Advisement Reports** > **Miscellaneous Reports**).

Field or Control	*Description*
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.

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Field or Control	*Description*
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 and print options on the Requirement Advisement Report page.
2. Click the **Run** button to process the report.

Page Used to Create a Requirement Advisement Report

Page Name	*Definition Name*	*Navigation*	*Usage*
Requirement Advisement Report	RUNCTL_SRRQRADV	**Academic Advisement** > **Advisement 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.

Defining the Requirement Advisement Report Parameters

Access the Requirement Advisement Report page (**Academic Advisement** > **Advisement Reports** > **Academic Requirement**).

Field or Control	*Description*
Run Control ID	Identifies the report request. You can use any alphanumeric combination.

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Field or Control	*Description*
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.

Field or Control	*Description*
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 if the 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.

Description Options

This page enables you to control how you present descriptions in the report.

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Field or Control	*Description*
Print Course Level	Select the print course level that governs the type of course description that is included in the report. Values are: *All:* Indicates that all of the 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 Line Level	Select the print line level that governs the type of line description that is included in the report. Values are: *All:* Indicates that all five of the descriptions (search descriptions, the long description, and the two report descriptions) on the Requirement Line Item page print on the report. *Long:* Indicates that the long description and the report long description on the Requirement Line Item page print on the report. *Standard:* Indicates that the search description and the report description on the Requirement Line Item page print 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.

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Field or Control	*Description*
Print Requirement Level	Enter the print requirement level that governs the type of requirement description that is included in the report. Values are: *All:* Indicates that all five of the descriptions (search, short search, report, long, and report long descriptions) on the Requirement page print on the report. *Long:* Indicates that the long description and the report long description on the Requirement page print on the report. *Standard:* Indicates that the search description and report description on the Requirement page print 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.

Field or Control	*Description*
Print Line Level	Select to print the line detail on the report. If the check box is clear, no line detail prints.
Print Requirement Level	Select to print the requirement detail on the report. If the check box is clear, no requirement detail prints.

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Field or Control	*Description*
Course List Detail Level	Select how the course list detail should appear in the report. Values are: *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 only the course list prints on the report. *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. Enter the report type and any other general parameters on the Reverse Engineering Report page.
2. Click the **Run** button to process report.

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Page Used to Produce a Reverse Engineering Report

Page Name	*Definition Name*	*Navigation*	*Usage*
Reverse Engineering Report	RUNCTL_SRREVENG	• **Academic Advisement** > **Advisement Reports** > **Reverse Engineering** • **Curriculum Management** > **Enrollment Requirements** > **Reverse Engineering Report**	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 (**Academic Advisement** > **Advisement Reports** > **Reverse Engineering**).

Field or Control	*Description*
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	Select the report type that indicates the subject of the search. Values are: *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.

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Field or Control	*Description*
Course ID, Subject Area, and **Catalog Nbr** (catalog 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 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 *Conditions in RG, RQ, RQLN,* the subject of the search is a condition (or conditions) in a requirement group, requirement, or requirement line.

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Field or Control	*Description*
Condition Code	Enter the condition code that indicates which field in the database is subject to this condition. For example, *Academic Level, Academic Plan, Academic Program,* and *Academic Sub-Plan* are condition codes. *Academic Plan* and *Primary Academic Plan* reference the exact same plan when the student has one plan only. *Academic Program* and *Primary Academic Program:* Reference the exact same program when the student has only one program. *Academic Plans* and *Academic Programs:* Indicate that all of a student's plans and programs are part of the equation. *Academic Sub-Plans:* Indicates that all of a student's sub-plans are part of the equation. *Dynamic Condition:* Enables you to select one of the dynamic conditions that has been previously created in the Define Dynamic Condition component. *Student Groups:* Indicates that all of the student groups containing a student are part of the equation. *Test Score:* Enables you to identify a test ID, test component, condition operator, and test score. 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 *Dynamic Condition,* 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: *None, Less or Equal, Greater or Equal, Equal, Greater Than, Less Than, Not Equal, In,* and *Not In.* 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.

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Field or Control	*Description*
Ignore Condition Operator	Select 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 *Dynamic Condition,* 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.

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Chapter 16

Producing Academic Advisement Reports

Understanding Academic 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.

A core function of Academic Advisement is the ability to generate an advisement report for a student, several students, or a group (batch) of students. The advisement report is the degree audit report that reflects a student's progress toward graduation. Depending on the setup of your report types, an advisement report may show not only courses taken, but also in-progress, planned, shopping cart, and what-if courses.

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 based on simulated careers, programs, plans, and subplans.

You can generate what-if reports for both students and prematriculated students (for example, prospective students), provided the prematriculated students have an EMPLID. Note that you can generate advisement reports without the what-if parameters (degree audit based on current academic structure) for active students only.

After you run the report process, you can view the results online as well as generate a .pdf view of the report. You can also print the results.

If you process a what-if report (course what-if, for example) the report reflects the what-if results accordingly. For example, the interactive advisement report identifies the what-if course with a what-if icon and the delivered pdf report identifies the what-if course as a what-if type course.

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 for Producing Academic Advisement Reports

Before you can process advisement reports, you must:

- Select the **Academic Advisement** option on the Installation Student Administration page.
- Set up advisement report types.
- Define additional report identifiers, as needed.

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Related Links

"Understanding Installation Setup and System Defaults" (Campus Solutions Application Fundamentals)
Setting Up Advisement Report Types
Setting Up Report Identifiers
Understanding Batch Academic Advisement Reports

Producing Academic Advisement Reports

This section discusses how to:

- Select general parameters.
- Add a what-if course.
- Select student and what-if data for processing.
- Request multiple Academic Advisement reports.

Pages Used to Create an Academic Advisement Report

Page Name	*Definition Name*	*Navigation*	*Usage*
Report Request	SAA_RPT_RQST	**Academic Advisement** > **Student Advisement** > **Request Advisement Report**	Select the type of report and set other general parameters of the report request.
Request Multiple AA reports	SAA_MULTI_RPT_RQST_GBL	**Academic Advisement** >**Student Advisement** >**Request Multiple AA Reports**	Request different report types for multiple students excluding What-If reports.
Report Request Log	SAA_RPT_RQST_LOG	**Academic Advisement** > **Student Advisement** > **Request Advisement Report**	Review report request messages.
Advisement Report Request - Course Search	SAA_CRSEWHIF_SRCH	Click the **Add a What-If Course** link on the Report Request page.	Select a subject and then search from the course catalog for a course to use during the what-if analysis.
Create What-If Scenario	SAA_STDNT_WHIF	Select the **Use Career Simulation** check box on the Report Request page. Then click the **View/Change the Career Simulation** link to access the Create What-If Scenario page, which you will use to set up the what-if scenario.	Set up or review the what-if scenario for the student.

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Selecting General Parameters

Access the Report Request page (**Academic Advisement** >**Student Advisement** >**Request Advisement Report**).

Field or Control	*Description*
Report Date	Reflects the **Report Date** value identified in the advisement report type setup. **Note:** If the default value defined for the advisement report type is *Current Date*, then two additional items appear on the page: the **Use This Request Report Date** check box and the **?** icon, that offers explanatory text.
As of Date	Reflects the **As of Date** value identified in the advisement report type setup. **Note:** If the default value defined for the advisement report type is *Current Date*, then two additional items appear on the page: the **Use This Request As of Date** check box and the **?** icon, that offers explanatory text.
Use This Request Report Date	This check box appears only when the Report Date value on the advisement report type setup is *Current Date*. Select this option for the request process to use the user-defined date as the report date. If the check box is not selected, then the **Report Date** on the request is updated with the current date.
Use This Request As of Date	This check box appears only when the As of Date value on the advisement report type setup is *Current Date*. Select this option for the request process to use the user-defined date as the As of Date. If the check box is not selected, then the As of Date on the request is updated with the current date.
	This help icon appears only when the **As of Date** or **Report Type** values on the advisement report type setup are *Current Date*. Mouse-over the icon to read explanatory text for the check box. You can customize the text to suit your need using the Message Catalog: • **Use this Request As of Date** check box: Entry 14530, 13. • **Use this Request Report Date** check box: Entry 14530, 14.
Report Identifier	Enter the report identifier (for example, ADMIN) from the Report Identifier table.

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Actions

Click the **Process Request** button when you are ready to submit the request for processing.

Field or Control	*Description*
View Report	Click to view the report that was generated. This link appears on the page after the report request is processed.

Field or Control	*Description*
View Report as PDF	Click to view a .PDF version of the advisement report. This button appears on the page after the request is processed.

Field or Control	*Description*
Printer	Enter the path for your local postscript printer. This field appears on the page after the request is processed.
Send to Printer	Click to send the report results to the designated printer. This button appears on the page after the request is processed.

What-If Information

Field or Control	*Description*
Use Career Simulation	Select to indicate that you want to set up a what-if scenario. **Note:** You do not need to select this check box if you want to set up a course what-if scenario only. If selected, the **View/Change the Career Simulation** link appears. Click to access the Create What-If Scenario page to create a what-if career scenario.

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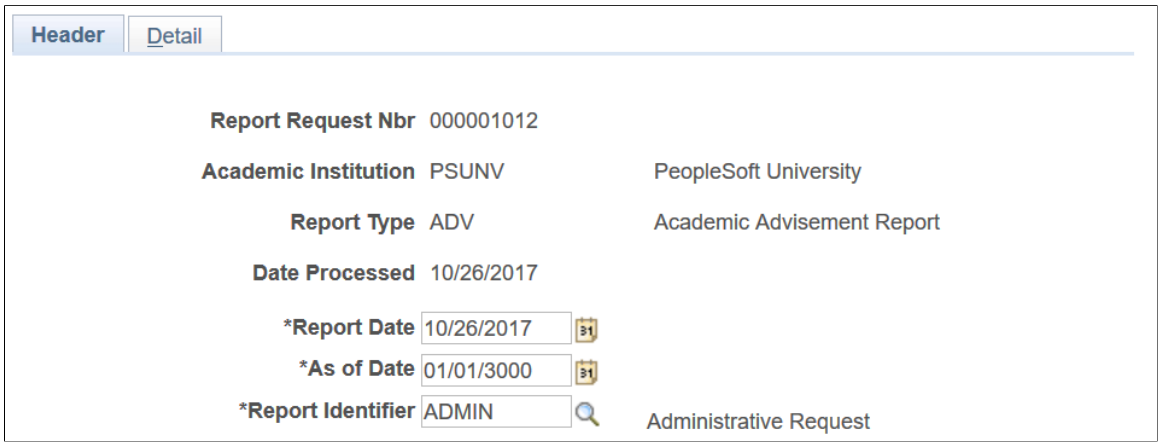
Field or Control	*Description*
Add a What-If Course	Click to access the Advisement Report Request - Course Search page. You can use the **Advisement Report Request - Course Search** page to select a course that you want included in the degree audit. Enter the courses in the order in which you want to simulate their being taken. The number of what-if courses you add has no limit. Click the **Add a What-If Course** link each time you want to add a what-if course to the setup. You must select a career, term, and then subject before executing the search. After you have selected the course, subject, catalog number, units, requirement designation (if applicable), and topic ID (if applicable), these values appear on the Report Request page. You can change these values as desired. You can also enter a specific academic term. The more data you enter about the what-if course, the more accurately the degree audit can evaluate the what-if course.

Requesting Multiple Academic Advisement Reports

Access the Request Multiple AA Reports page (**Academic Advisement** >**Student Advisement** >**Request Multiple AA Reports**).

Use this page to request various types of reports (excluding What-If reports), for different students.

This example illustrates the fields and controls on the Header page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Report Request Nbr	A unique identifier assigned to the report request.

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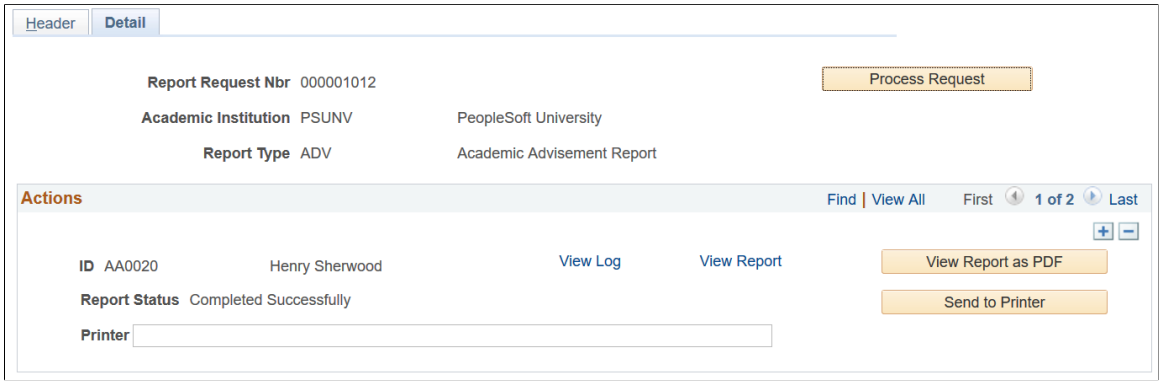
Field or Control	*Description*
Report Date	The default value based on the setup in the Define Advisement Report Types page for the requested report.
As of Date	The default value based on the setup in the Define Advisement Report Types and/or Academic Advisement Installation pages for the requested report.
Report Identifier	Enter the report identifier from the Report Identifier table; for example, ADMIN.

This example illustrates the fields and controls on the Detail page. You can find definitions for the fields and controls later on this page.



After selecting the Report Type on the Header page, select an **ID** in the **Action** box on the Detail page. Then select the **Process Request** button. The Actions box contains the name and ID of the student and following information:

Field or Control	*Description*
Report Status	Indicates the status of your report request- pending, successful or failed.
View Log	Select to view a detailed log of report requests for the particular student.
View Report	Click to view the report that was generated. This link appears on the page after the report request is processed.
View Report as PDF	Click to view a .PDF version of the advisement report. This button appears on the page after the request is processed.
Printer	Enter the path for your local postscript printer. This field appears on the page after the request is processed.

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Field or Control	*Description*
Send to Printer	Click to send the report results to the designated printer. This button appears on the page after the request is processed.

Adding a What-If Course

Access the Advisement Report Request - Course Search page (Click the **Add a What-If Course** link on the Report Request page).

After you enter the required information on the Report Request page and executes the search, the system returns course search results that match the career, term, and subject information. The course search results display the appropriate current row based on the start date of the selected term.

Field or Control	*Description*
Subject	Enter the subject.
Execute the Search	Click to display a list of courses. Select the check box next to the required course, and then click the **OK** button. The course then appears on the Report Request page.

Selecting Student and What-If Data for Processing

Access the Create What-If Scenario page (Select the Use Career Simulation check box and then the View/Change Career Simulation link on the Report Request page).

Use this page to enter student and what-if data.

When you access the page, most of the fields are blank. To retrieve the student's existing record, click the **Copy Current Program** button. You can use these field values to build a program, plan, and subplan what-if scenario. You can change field values and insert rows, as necessary.

If you have defined a what-if scenario and want to clear the field values you entered, click the Clear What-If Values button. This clears most field values so that you can start again.

Program What-If Data

Field or Control	*Description*
Academic Institution	This field defaults to the institution for which the report type was defined. Do not change this value.
Academic Career	Enter the value for the what-if career.

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Field or Control	*Description*
Career Requirement Term	Enter a what-if requirement term value for the career override. The system uses this value to select the correct effective-dated career-level requirement groups.
Requirement Term	Enter the what-if program requirement term. The system uses this value to select the appropriate effective-dated program-level requirement groups.
Student Career Number	The default value on this page is 1. You can change the student career number for use in the scenario.
Academic Program	Enter the academic program value that you want to use in the what-if degree audit. You can use one or many programs in the what-if scenario.

Plan What-If Data

Field or Control	*Description*
Requirement Term	Enter the requirement term for the what-if plan. The system uses this value to select the appropriate effective-dated plan-level requirement groups.
Academic Plan	Enter an academic plan for use in the what-if scenario. The system uses this value to select the correct effective-dated plan-level requirement groups.
Plan Sequence	Displays a sequence number. This sequential number is supplied by the system. This number indicates the order or sequence of multiple plans, if any. The plan with the lowest sequence number is considered primary within the plan. You can override the number.

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Sub-plan What-If Data

Field or Control	*Description*
Requirement Term	Enter the requirement term for the what-if subplan. The system uses these values to select the appropriate effective-dated subplan-level requirement groups.
Academic Sub-Plan	Enter an academic subplan for use in the what-if scenario. The system uses this value to select the appropriate effective-dated subplan-level requirement groups.
Plan Sequence	Displays a sequence number. This sequential number is supplied by the system. This number indicates the order (or sequence) of multiple subplans, if any. The subplan with the lowest sequence number is considered primary. The user can override the number, if necessary.

Click the **OK** button to save the page and return to the Report Request page.

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Chapter 17

Producing Academic Advisement Transcript Reports

Understanding Online and Batch Advisement Transcript Reports

Important! The COBOL transcript process is a deprecated product. Support will be maintained for this product, but no new development will be produced for the COBOL transcript process. It is strongly recommended that you use the Application Engine transcript process instead. For more information on the Application Engine transcript process, see "Understanding Transcript-Related Processes" (Student Records).

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 discussed in these topics is a type of transcript. You can produce a report that includes or excludes the student's academic history (academic transcript). The transcript type that you specify at runtime determines which format the system uses (advisement or transcript).

Important! These topics discuss advisement reports generated using the following components: Student Advisement Report (AA_RPT), Transcript Request Component (TSCRPT_RQST), Batch Transcript Request (RUNCTL_SR_TSBATCH), or View Degree Progress Report (SS_AA_REPORT). Refer to the topics, Producing Academic Advisement Reports and Using Self Service Academic Advisement, to learn how to generate online advisement reports, including what-if reports, using other administrative and self-service components. In this product documentation, an academic advisement report (or advisement report) or academic advisement transcript report is also referred to as a degree progress report or degree audit report. An academic advisement transcript report typically refers to a report that includes the academic transcript, as well as the degree audit information.

See Producing Academic Advisement Reports.

See "Setting Up Self-Service Features for Academic Advisement" (Campus Self Service).

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.

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Prerequisites for Producing Academic Advisement Transcript Reports

Important! The COBOL transcript process is a deprecated product. Support will be maintained for this product, but no new development will be produced for the COBOL transcript process. It is strongly recommended that you use the Application Engine transcript process instead. For more information on the Application Engine transcript process, see "Understanding Transcript-Related Processes" (Student Records).

Before you can process advisement reports, you must set up advisement transcript types in the Transcript Type (TSCRPT_TYPE) component.

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.

Important! If you plan to use the advisement transcript, which is defined in the TSCRPT_TYPE component, then you must also define an advisement report type with that same name (ADVIP, for example) using the Define Advisement Report (SAA_RPT_TYPE) component. Otherwise, when you generate an advisement transcript report (using the AA_RPT component, for example), the system will not process degree audit report results for that student. Field values that you select on the SAA_RPT_TYPE component are ignored when generating the advisement transcript, with two exceptions: the effective date, and the program status.
Effective Date: The **As of Date** on the Request Detail page of the AA_RPT component recognizes the effective date of the advisement report type. If the effective date on the advisement report type is greater than the **As of Date,** then the system will not process degree audit report results for the student.
Program Status: You must identify within the SAA_RPT_TYPE component the program statuses that are valid for the transcript type. The system obeys valid program status values that you define on the Define Advisement Report component when you generate an advisement transcript report. For example, if you select *Active* as the only valid program status on the SAA_RPT_TYPE component, then the results for the corresponding advisement transcript do not include report results for a student if his program status is, for example, *Completed.*

Producing an Online Academic Advisement Transcript Report

Important! The COBOL transcript process is a deprecated product. Support will be maintained for this product, but no new development will be produced for the COBOL transcript process. It is strongly recommended that you use the Application Engine transcript process instead. For more information on the Application Engine transcript process, see "Understanding Transcript-Related Processes" (Student Records).

This section discusses how to:

- Select the transcript type and general parameters.

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- 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 Transcript Report

Page Name	*Definition Name*	*Navigation*	*Usage*
Request Header	SA_REQUEST_HEADER	• **Academic Advisement** > **Student Advisement** > **Student Advisement Report** > **Request Header** • **Records and Enrollment** > **Transcripts** > **Transcript Request** > **Request Header**	Select the type of transcript and set other general parameters of the report request.
Request Detail	SA_REQUEST_DETAIL	**Academic Advisement** > **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 Advisement** > **Student Advisement** > **Student Advisement Report** > **Report Results** • **Records and Enrollment** > **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 only an audit report.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Report Errors	SA_REQ_REPORT_ERR	• **Academic Advisement** > **Student Advisement** > **Student Advisement Report** > **Report Errors** • **Records and Enrollment** > **Transcripts** > **Transcript Request** > **Report Errors**	View the 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 *Errors* rather than *Successful* 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 (**Academic Advisement** > **Student Advisement** > **Student Advisement Report** > **Request Header**).

Field or Control	*Description*
Report Request Nbr (report request number)	Displays the identification number for 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	Enter the institution to which both the transcript type data and the students that you process are associated.
Transcript Type	Enter 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 Setting Up Special Requirement Usage Values. **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 during a subsequent transcript purge process.

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Field or Control	*Description*
Override Service Indicator	Select to have the system ignore student-specific service indicators when you process the request. If this check box is not selected, then service indicators are evaluated. For instance, some service indicators prevent a student from receiving a transcript. See "Understanding Service Indicators" (Campus Community Fundamentals).
Output Destination	Select the output destination of the transcript. This value determines where the system sends the electronic 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 are: *Page:* Sends the transcripts to the Report Results page to be viewed online. *Printer:* Like the *Page* option, sends the transcripts to the Report Results page to be viewed online. 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.*

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Field or Control	*Description*
Future Release	Select the future release value that triggers when the system processes the transcript request through a batch generation process running in the background. Values are: *Immediate Processing:* Indicates that no specific future release transcript request exists. *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	Displays 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	Enter 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 are *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.

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Report Format

Field or Control	*Description*
Report Format	Select the format for 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 are: *Standard Report Format:* The report is printed as hard copy or delivered to a page. The analysis database does not refresh when the **Report Format** field value is *Standard Report Format.* This value is the default. *Analysis Database:* 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:* The report contains only those requirements that have been wholly completed. Normally, the degree audit report applies bold type to incomplete requirement groups and requirements, but not to completed requirement groups and requirements. *Incompleted Only:* 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:** Enter *Analysis Database* in the **Report Format** field to write the degree audit report to the analysis database for future use by 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 Understanding the Analysis Database.

Selecting Student and What-If Data for Processing

Access the Request Detail page (**Academic Advisement** > **Student Advisement** > **Student Advisement Report** > **Request Detail**).

Use this page to enter student and what-if data.

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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-If.

Field or Control	*Description*
Seq Nbr (sequence number)	Displays a sequence number. This system-supplied number is sequential. This number determines the order in which the individual report requests are processed. The user can override this 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 runtime. 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 used.

What-if Analysis

Field or Control	*Description*
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.

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Field or Control	*Description*
Quick What-If	Clear the **Enable Stored What-If** check box to enable this option. 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 enter using the Quick What-If Analysis Report page.
Course List What-If	Clear the **Enable Stored What-If** check box to enable this option. 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.

Field or Control	*Description*
Send	If the report is to be sent to a recipient, click to access the Send To Information page and enter the recipient information.

Related Links

Understanding What-If Advisement Reports

Specifying Send To Information

Access the Send To Information page (Click the Send button on the Request Detail page).

Field or Control	*Description*
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.

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Field or Control	*Description*
Print	Click to print all of the reports listed on the page. When multiple sequence number rows are present, all of the listed reports print.

Viewing and Printing Advisement Report Results

Access the Report Results page (**Academic Advisement** > **Student Advisement** > **Student Advisement Report** > **Report Results**).

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: Processing order and reporting order are different. 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 about grade point average (GPA) and units. If the student has not met a requirement, the heading is printed in bold type. If the requirement has been met, the heading is not printed in bold type.

When courses are printed, information about 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 (**Academic Advisement** > **Student Advisement** > **Student Advisement Report** > **Report Errors**).

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Field or Control	*Description*
Seq Nbr (sequence number)	Displays a system-supplied sequential number. 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 Transcript Reports

This section discusses how to use the Batch Transcript Request component to process academic advisement transcript 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 then select the **Database Report** check box.

Related Links

"Processing Batch Transcripts (Application Engine)" (Student Records)

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 sub-plan 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 sub-plans. 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.

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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, which enables 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:

- Use the **Course List What-If** option to retrieve what-if individual courses from the established course catalog.
- Use the **Quick What-If** option to create a new what-if scenario (program, plan, and sub-plan) for a student.
- Use the **Stored What-If** option 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	*Definition 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 sub-plan.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Program What-If	STDNT_PROG_WHIF	**Academic Advisement** > **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 Advisement** > **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 Advisement** > **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 (Click the Course List What-If link on the Request Detail page).

Warning! Previously defined student course substitutions do not apply to what-if courses.

Note: Enter the courses 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 correct order.

1. Enter the **Course ID** or the **Subject** (with or without the catalog number) of the simulated course.
2. 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.

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Entering a What-if Course

Access the Course Search page (Click the Search button on the Course List What-If Analysis page).

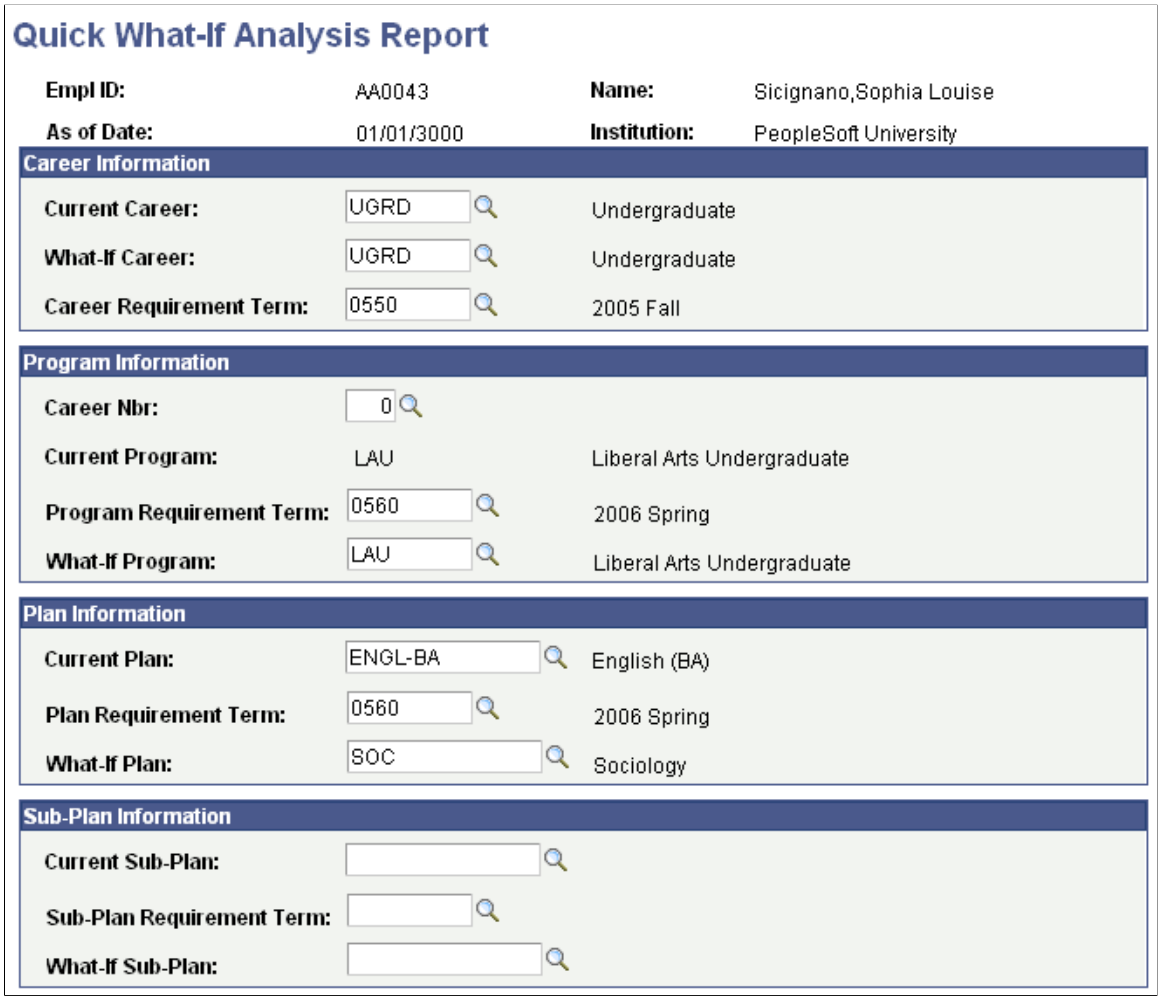
Click the **Select Course** button to enter the course information on the Course List What-If Analysis page.

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 (Click the Quick What-If link on the Request Detail page).

This example illustrates the fields and controls on the Quick What-If Analysis Report page . You can find definitions for the fields and controls later on this page.



You can generate a quick what-if report for various scenarios, for example, you can generate a report based on a student's:

- Alternate career, program, plan, or subplan information.

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- Current career and program information but a different plan (for example, Sociology instead of Psychology).
- Current academic structure information but different requirement term information, for example, a future term (the what-if report results then reflect the future-term selections).

Important! If you leave the **current** fields empty, then only the what-if values are taken into account during the what-if analysis. Enter values in the **current** fields if the student has multiple programs, plans, and sub-plans and you want to override a specific program, plan, and sub-plan during 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 what-if plan is Business with a requirement term of Fall 1998, then the analysis overrides all of the existing plans (Accounting and Communications) if the **Current Plan** field is blank. The what-if report will display results for the analysis of the what-if Business plan. However, if you enter *Accounting* as the value for the **Current Plan** field, then the what-if analysis overrides the plan of Accounting only and retains the plan of Communications. Thus, the student is evaluated for a double major in Communications and Business.

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.

If you have a more complex scenario to run involving multiple careers, programs, or plans, use the stored what-if feature.

Career Information

Field or Control	*Description*
Current Career	(Optional) If you enter a value in this field, the system automatically populates fields in the Career Information and Program Information group boxes with the information from the student's current career and program.
What-if Career	Enter the substitute or what-if career.
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 Information

Field or Control	*Description*
Career Nbr	The value 0 (zero) appears by default for this field. If required, change the default value. For instance, you may want to change the default value when the student has two career numbers in the same academic program.

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Field or Control	*Description*
Current Program	This is a display-only field. If you entered a value in the Current Career field, the system automatically enters a value in this field. If the student has two active programs, the system enters a program with the lowest student career number. If you leave the current career field blank, then no current program information appears. Leave this field blank to override all of the student's current programs.
Program Requirement Term	Enter the desired what-if requirement term for the what-if academic program. The system uses this value to select the correct effective-dated, program-level requirement groups.
What-if Program	Enter the substitute or what-if program.

Plan Information

Field or Control	*Description*
Current Plan	Enter a value only if you want to override a student's specific plan. This field is available only when you select a Current Career field value (you cannot enter a current plan if you did not enter a value in the Current Career field). Leave this field blank to override all of the student's plans except the what-if plan. For example, let us suppose that the student has an undergraduate career, with a Liberal Arts program, and Biology and History plans. The user leaves the current career blank, enters career and program requirement terms, enters a what-if program of Liberal Arts, and enters a what-if plan of Philosophy. When the user generates the quick what-if report, the audit will show results for the Philosophy plan only. The audit engine will not process results for the Biology or History plans. It will override all the other program and plan data for that career.
Plan Requirement Term	After 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.
What-if Plan	Enter the substitute or what-if plan.

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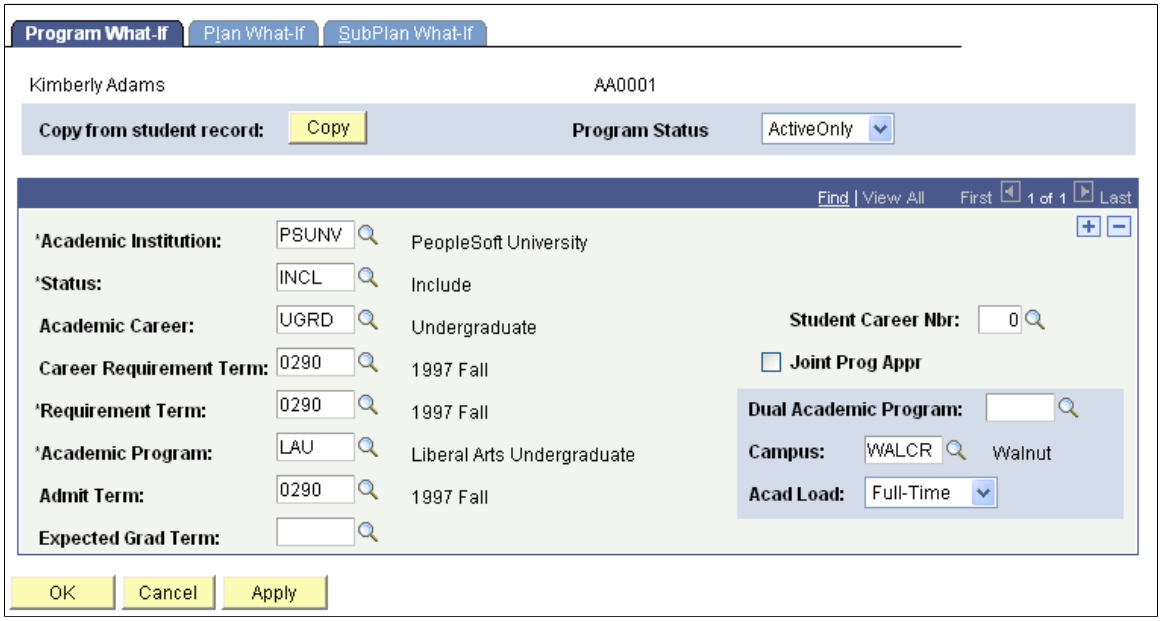
Subplan Information

Field or Control	*Description*
Current Sub-Plan	Enter a value only if you want to override a student's specific subplan. Leave this field blank to override all of the student's current subplans.
Sub-Plan Requirement Term	After 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.
What-if Sub-Plan	Enter the substitute or what-if sub-plan.

Defining a Stored What-If Program for a Student

Access the Program What-If page (Click the Stored What-If link on the Request Detail page).

This example illustrates the fields and controls on the Program What-If page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
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.

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Field or Control	*Description*
Program Status	Displays the value selected when you click 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 Institution	Enter the academic institution that contains the stored what-if scenario.
Status	Select how the program is processed in the what-if degree audit. Values are: *INCL:* Includes the advisement status of the what-if career and program in the degree audit. This value appears by default. *NINC:* Excludes the advisement status of the what-if career and program in the degree audit. *OPT:* The what-if career and program appear on the report, but they are not counted towards graduation.
Academic Career and **Student Career Nbr** (student career 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 previous example, one of the rows would be *Undergraduate, Liberal Arts* and the other row would be *Undergraduate, Fine Arts.* Each row 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.

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Field or Control	*Description*
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 before Fall 1999 are used in the audit if the career requirement term is Fall 1999.
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.
Academic Program	Enter the what-if academic program for the student. You can enter a future-dated program.
Admit Term	Enter the term in which the student was admitted to the what-if program.
Expected Grad Term (expected graduation term)	Enter the term in which the student is expected to graduate.
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)	Select the academic load for the student in this what-if scenario. Values are: *None, Full-Time,* and *Part-Time. Full-Time* appears by default. *None* converts to *Full-Time.* 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 (Click the Stored What-If link on the Request Detail page).

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Plan Description

Field or Control	*Description*
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.
Academic Plan	Enter the what-if academic plan for the student. You can select a future-dated plan.
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 that indicates for this what-if academic plan how the plan is processed in the what-if degree audit. Values are: *INCL:* The advisement status of the what-if plan is included in the degree audit. This value appears by default. *NINC:* The advisement status of the what-if plan is not included in the degree audit. *OPT:* The what-if academic plan appears on the report but is not counted towards graduation.
Degree	Displays the degree that is associated with the plan.
Degree Checkout Stat (degree checkout status)	Displays the degree checkout status. If you click the **Copy** button on the Program What-If page, then the degree checkout status appears by default. This value does not affect the what-if analysis.
Student Degree Nbr (student degree 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.

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Field or Control	*Description*
Completion Term	Displays the student's anticipated completion term. 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.

Defining a Stored What-If Sub-Plan for a Student

Access the SubPlan What-If page (Click the Stored What-If link on the Request Detail page).

Academic SubPlan

Field or Control	*Description*
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.
Academic Sub-Plan	Enter the student's what-if academic sub-plan. You can select a future-dated subplan.
Academic Sub-Plan Type	Enter the appropriate academic sub-plan type prompts from the Academic Sub-Plan Table 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.
Advisement Status	Enter how the sub-plan is evaluated in the what-if degree audit. Values are: *INCL* (default): The advisement status of the what-if sub-plan is included in the degree audit. *NINC:* The advisement status of the what-if sub-plan is not included in the degree audit. *OPT:* The what-if academic sub-plan appears on the report but is not counted towards graduation.

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Processing Self-Service Advisement Reports

See "Viewing Self-Service Advisement Transcripts" (Campus Self Service).

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Chapter 18

Using the Analysis Database to Create User Configurable Reports

Understanding the Analysis Database

The analysis database integrates the power of the academic advisement 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 your reporting tool of choice.

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. 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 Batch Transcript Request component).

Here's how to populate the analysis database tables for a small group of students:

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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.

Related Links

Producing an Online Academic Advisement Transcript Report

"Processing Batch Transcripts (Application Engine)" (Student Records)

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.

Page Used to Print the Contents of the Analysis Database

Page Name	*Definition Name*	*Navigation*	*Usage*
Database Tables Report	RUNCTL_SRDBTBLS	**Academic Advisement** > **Advising Reports** > **Database Tables**	Enter the parameters to capture the student population on which you want to report, and process the report.

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Processing the Database Tables Report

Access the Database Tables Report page (**Academic Advisement** > **Advising Reports** > **Database Tables**).

Field or Control	*Description*
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	Select the report type. Values include: *SPC:* Indicates a report with a special requirement usage. *STD:* 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 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 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 your reporting tool of choice to create a report that meets your needs. To do this, you can use most tools that coordinate with SQL.

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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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
WHAT_IF_FL	NA	Char	1	What-If Flag
REPORT_REQUEST_NBR	NA	Char	9	Report Request Nbr
INSTITUTION	NA	Char	5	Academic Institution
TSCRPT_TYPE	NA	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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None

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Column Name	Key	Data Type	Length	Comments
ENTRY_R_TYPE	NA	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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
RQRMNT_GROUP	Y	Char	6	None
RQ_DATE	NA	PSDATE	NA	Effective Date of Requirement Group
ENTRY_R_STATUS	NA	Char	4	None
PARTITION_FAIL	NA	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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type

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Column Name	Key	Data Type	Length	Comments
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
CRSE_TAG	Y	Char	4	None
INSTITUTION	NA	Char	5	None
SRC_INSTITUTION	NA	Char	5	None
ACAD_CAREER	NA	Char	4	None
SRC_CAREER	NA	Char	4	None
CRSE_CAREER	NA	Char	4	None
STRM	NA	Char	4	Term
APPLIED_TERM	NA	Char	4	None
TERM_TAKEN	NA	Char	4	None
CLASS_NBR	NA	Char	5	None
STDNT_ENRL_ STATUS	NA	Char	2	None

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Column Name	*Key*	*Data Type*	*Length*	*Comments*
UNT_TAKEN	NA	Decimal	3.2	None
UNT_PRGRSS	NA	Decimal	3.2	None
GRADING_BASIS_ ENRL	NA	Char	3	None
CRSE_GRADE_OFF	NA	Char	3	None
REPEAT_CODE	NA	Char	4	None
ASSOCIATED_ CLASS	NA	Smallint	4	None
AUDIT_GRADE_ BASIS	NA	Char	1	None
EARN_CREDIT	NA	Char	1	None
INCLUDE_IN_GPA	NA	Char	1	None
UNITS_ATTEMPTED	NA	Char	1	Valid Choices: In Progress ('I') and Attempted ('Y').
GRADE_POINTS	NA	Decimal	6.3	None
CRSE_ID	NA	Char	6	None
CRSE_OFFER_NBR	NA	Char	2	None
SESSION_CODE	NA	Char	3	None
CLASS_SECTION	NA	Char	4	None
ACAD_GROUP	NA	Char	5	None
SUBJECT	NA	Char	8	None
CATALOG_NBR	NA	Char	10	None
DESCR	NA	Char	30	None

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Column Name	Key	Data Type	Length	Comments
COMPONENT	NA	Char	3	None
CRS_TOPIC_ID	NA	Decimal	3	None
EQUIV_CRSE_ID	NA	Char	5	None
OVRD_CRSE_EQUIV_ID	NA	Char	1	None
START_DT	NA	PSDATE	NA	None
END_DT	NA	PSDATE	NA	None
CRSE_COUNT	NA	Decimal	2.2	None
CLASS_ENRL_TYPE	NA	Char	1	None
RQ_SCHOOL_TYPE	NA	Char	4	None
UNT_EARNED	NA	Decimal	3.2	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
CRSE_TAG	Y	Char	4	None
ACAD_GROUP	NA	Char	5	None
CRSE_ID	NA	Char	6	None
SUBJECT	NA	Char	8	None

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Column Name	Key	Data Type	Length	Comments
CATALOG_NBR	NA	Char	10	None
DESCR	NA	Char	30	None
OPRID	NA	Char	8	None
DESCR254A	NA	Char	254	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
REQUIREMENT	Y	Char	9	None
RQ_DATE	NA	PSDATE	NA	Effective Date of Student's Requirement
ITEM_R_STATUS	NA	Char	4	None
PARTITION_FAIL	NA	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	Not applicable (NA)	Report Date

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Column Name	Key	Data Type	Length	Comments
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
REQUIREMENT	Y	Char	9	None
RQ_LINE_NBR	Y	Char	4	None
ITEM_R_STATUS	NA	Char	4	None
DISP_SELECT_LINE	NA	Char	1	None
REQ_LINE_TYPE	NA	Char	3	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
ACAD_CAREER	Y	Char	4	None
CAR_DATE	NA	PSDATE	NA	None
ITEM_R_STATUS	NA	Char	4	None

The following describes the table, R_ACAD_PROG:

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Column Name	*Key*	*Data Type*	*Length*	*Comments*
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
ACAD_PROG	Y	Char	5	None
ACAD_CAREER	NA	Char	4	None
ITEM_R_STATUS	NA	Char	4	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
ACAD_PLAN	Y	Char	10	None
ACAD_CAREER	NA	Char	4	None
ACAD_PROG	NA	Char	5	None
ITEM_R_STATUS	NA	Char	4	None

The following describes the table, R_ACAD_SUBPLAN:

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Column Name	*Key*	*Data Type*	*Length*	*Comments*
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
ACAD_SUB_PLAN	Y	Char	10	None
ACAD_CAREER	NA	Char	4	None
ACAD_PROG	NA	Char	5	None
ACAD_PLAN	NA	Char	10	None
ITEM_R_STATUS	NA	Char	4	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
REQUIREMENT	Y	Char	9	None
RQ_LINE_NBR	Y	Char	4	None

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Column Name	Key	Data Type	Length	Comments
CRSE_TAG	Y	Char	4	None
SEL_PROCESS_TYPE	NA	Char	3	Valid Types: Verify ('VER'), Sequence ('SEQ'), Limit ('LIM'), and Standard ('STD').
SEL_MODE	NA	Char	1	Valid Modes: Selected ('S'), Not Selected ('N'), and Excluded ('X').
IN_PROGRESS_GRD	NA	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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
REQUIREMENT	Y	Char	9	None
RQ_LINE_NBR	Y	Char	4	None
CONDITION_CODE	Y	Char	3	None
CONDITION_ OPERATOR	Y	Char	2	None
CONDITION_DATA	Y	Char	10	None

The following describes the table, R_UNIT_CRSE_GPA:

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Column Name	*Key*	*Data Type*	*Length*	*Comments*
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
UNITS_REQUIRED	NA	Decimal	4.2	None
UNITS_NEEDED	NA	Decimal	4.2	None
CRSES_REQUIRED	NA	Decimal	4.2	None
CRSES_NEEDED	NA	Decimal	4.2	None
GPA_REQUIRED	NA	Decimal	3.3	None
GPA_ACTUAL	NA	Decimal	3.3	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
DESCR_LN_NBR	Y	Smallint	NA	None
DESCR254	NA	Char	254	None

The following describes the table, R_OVERRIDE_RG:

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Column Name	*Key*	*Data Type*	*Length*	*Comments*
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
RQ_RG_OVRD_ ACTION	NA	Char	4	None
OLD_UNITS	NA	Decimal	4.2	None
NEW_UNITS	NA	Decimal	4.2	None
OLD_CRSES	NA	Decimal	4.2	None
NEW_CRSES	NA	Decimal	4.2	None
REF_RQMT_GROUP	NA	Char	6	None
OPRID	NA	Char	30	None
DESCR254A	NA	Char	254	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence

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Column Name	Key	Data Type	Length	Comments
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
REQUIREMENT	NA	Char	9	None
RQ_OVRD_ACTION	NA	Char	4	None
OLD_UNITS	NA	Decimal	4.2	None
NEW_UNITS	NA	Decimal	4.2	None
OLD_CRSES	NA	Decimal	4.2	None
NEW_CRSES	NA	Decimal	4.2	None
REF_REQUIREMENT	NA	Char	9	None
OPRID	NA	Char	30	None
DESCR254A	NA	Char	254	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
REQUIREMENT	Y	Char	9	None

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Column Name	Key	Data Type	Length	Comments
RQ_LINE_NBR	Y	Char	4	None
RQ_LN_OVRD_ ACTION	NA	Char	4	None
OLD_MIN_UNITS	NA	Decimal	4.2	None
NEW_MIN_UNITS	NA	Decimal	4.2	None
OLD_MAX_UNITS	NA	Decimal	4.2	None
NEW_MAX_UNITS	NA	Decimal	4.2	None
OLD_MIN_CRSES	NA	Decimal	4.2	None
NEW_MIN_CRSES	NA	Decimal	4.2	None
OLD_MAX_CRSES	NA	Decimal	4.2	None
NEW_MAX_CRSES	NA	Decimal	4.2	None
OPRID	NA	Char	30	None
DESCR254A	NA	Char	254	None

The following describes the table, R_COURSE_DIREC:

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None

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Column Name	Key	Data Type	Length	Comments
REQUIREMENT	Y	Char	9	None
RQ_LINE_NBR	Y	Char	4	None
CRSE_TAG	Y	Char	4	None
OPRID	NA	Char	30	None
DESCR254A	NA	Char	254	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
PLANS_NEEDED	NA	Smallint	NA	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence

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Column Name	*Key*	*Data Type*	*Length*	*Comments*
ENTRY_SEQ	Y	Smallint	NA	None
RQRMNT_GROUP	Y	Char	6	None
ACAD_CAREER	Y	Char	4	None
ACAD_PROG	Y	Char	5	None
ACAD_PLAN	Y	Char	10	None
ACAD_SUB_PLAN	Y	Char	10	None

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	Not applicable (NA)	Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint	NA	Report Type Sequence
ACAD_CAREER	NA	Char	4	None
ACAD_CAREER_ OVRD	NA	Char	4	None
CAR_REQ_TERM	NA	Char	4	None
ACAD_PROG	NA	Char	5	None
ACAD_PROG_OVRD	NA	Char	5	None
ACAD_PROG_TERM	NA	Char	4	None
ACAD_PLAN	NA	Char	10	None
ACAD_PLAN_OVRD	NA	Char	10	None

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Column Name	*Key*	*Data Type*	*Length*	*Comments*
ACAD_PLAN_TERM	NA	Char	4	None
ACAD_SUB_PLAN	NA	Char	10	None
ACAD_SUB_PLAN_OVRD	NA	Char	10	None
ACAD_SUB_PLAN_TERM	NA	Char	4	None

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Chapter 19

Course Limit Examples

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 Parms 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 *I — 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:

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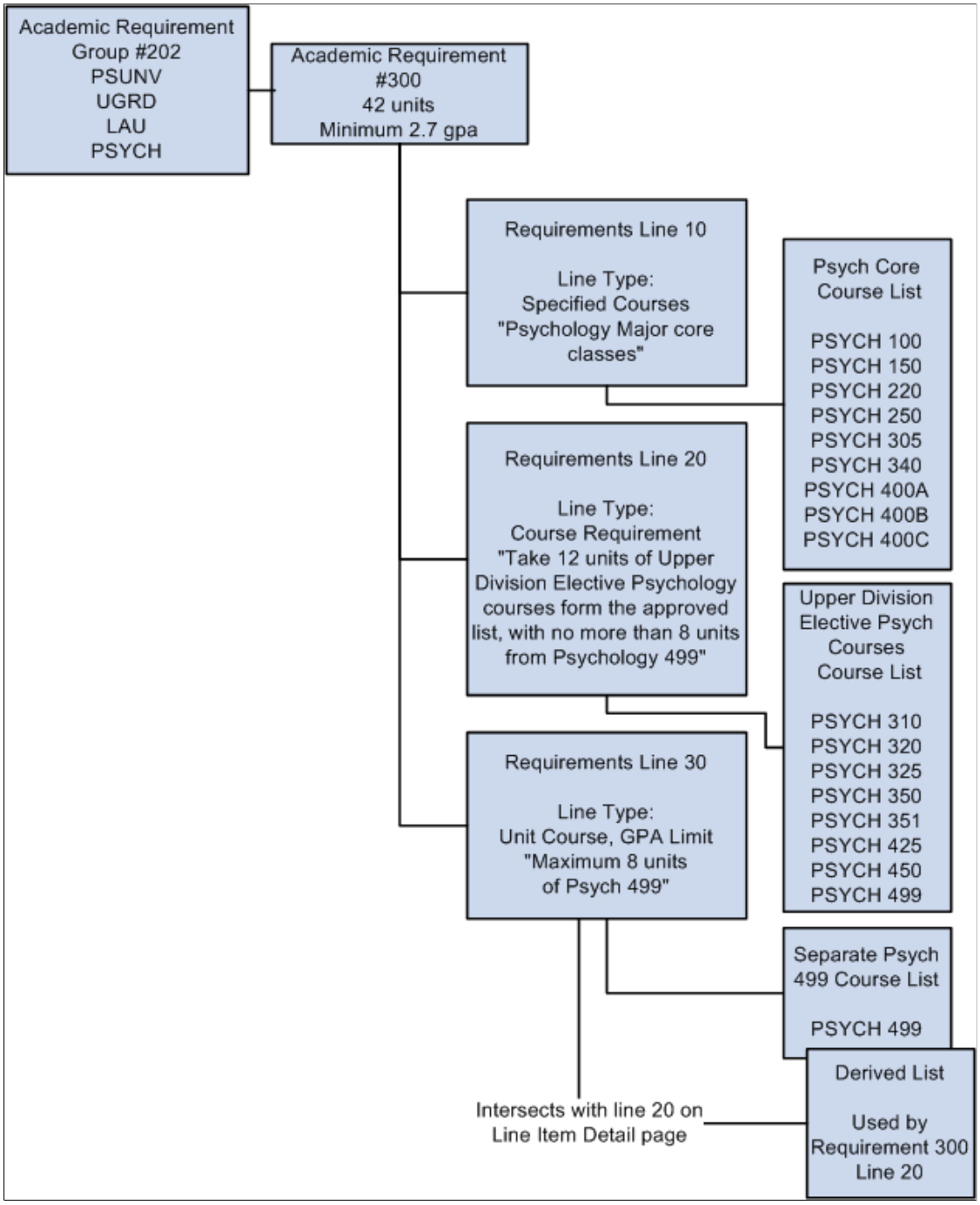
The diagram illustrates how to set up a local unit, course, or GPA limit requirement.



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.

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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 Understanding Academic Requirement Groups.

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.

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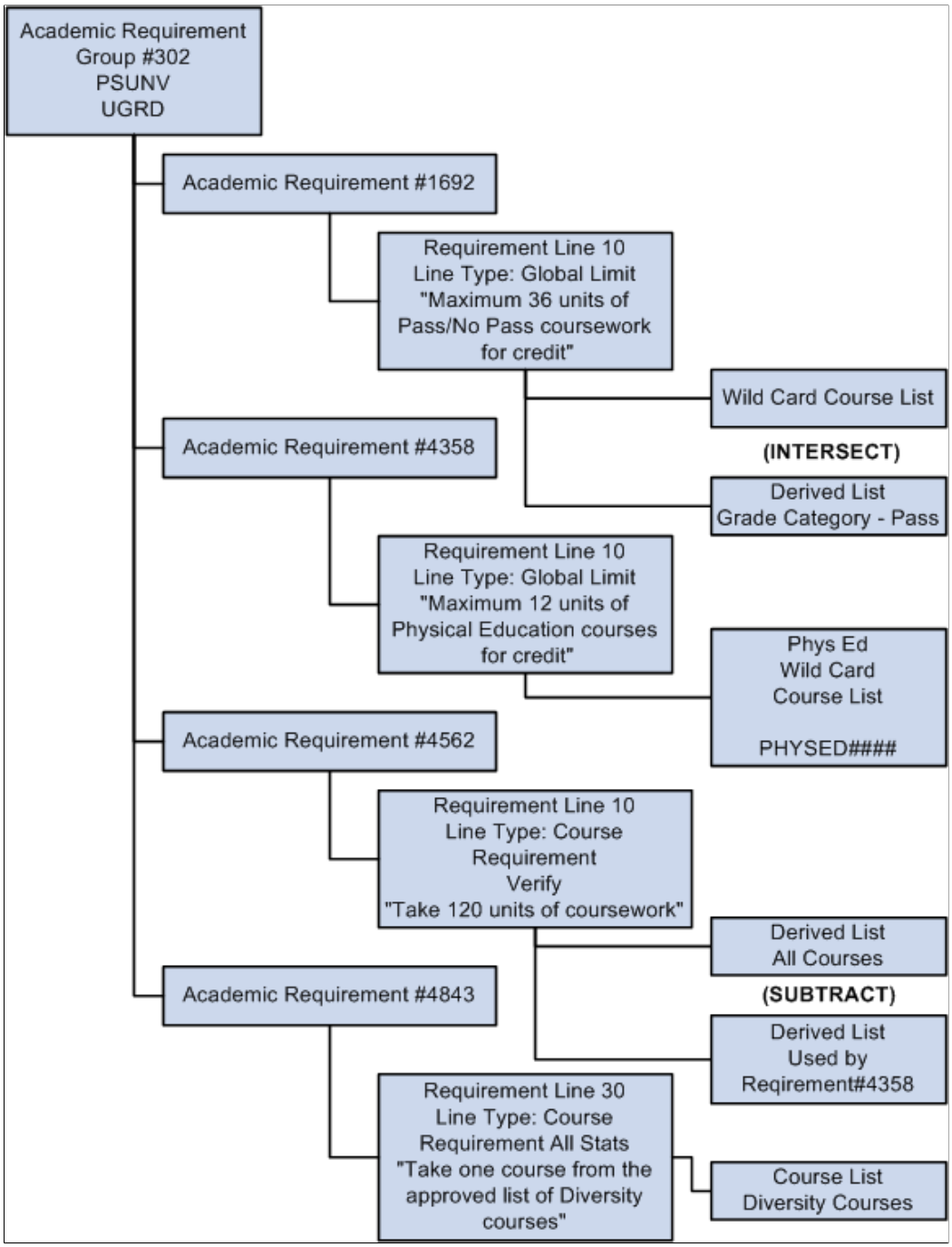
The diagram illustrates the setting up of standalone global course limits– either standalone or both standalone and with a Verify requirement.



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Chapter 20

Sequential Restriction Examples

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.

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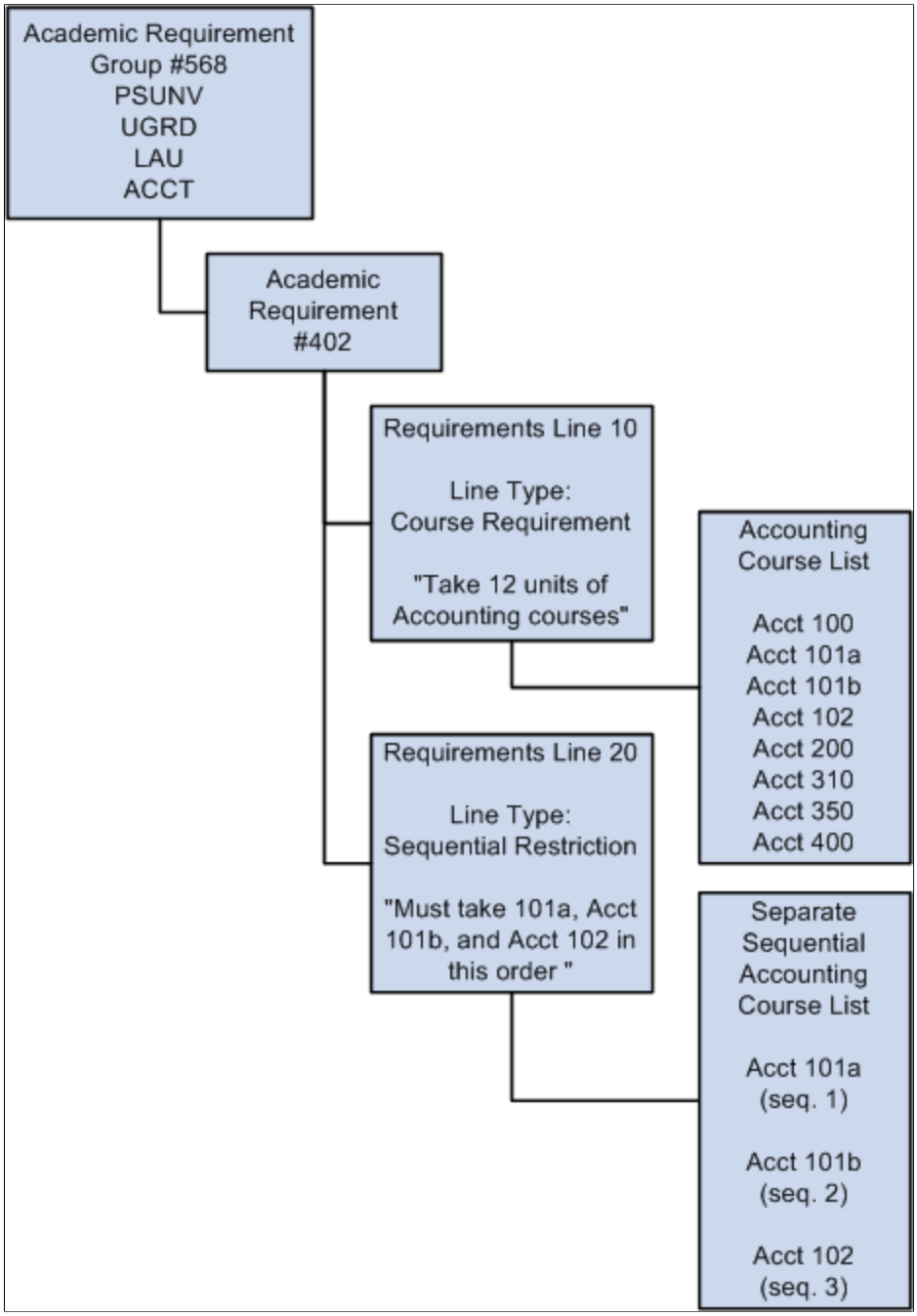
The diagram illustrates how to set up a local sequential restriction requirement.



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).

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Reporting sequence and academic structure determine the order in which academic requirement groups are evaluated.

See Understanding Academic Requirement Groups.

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.

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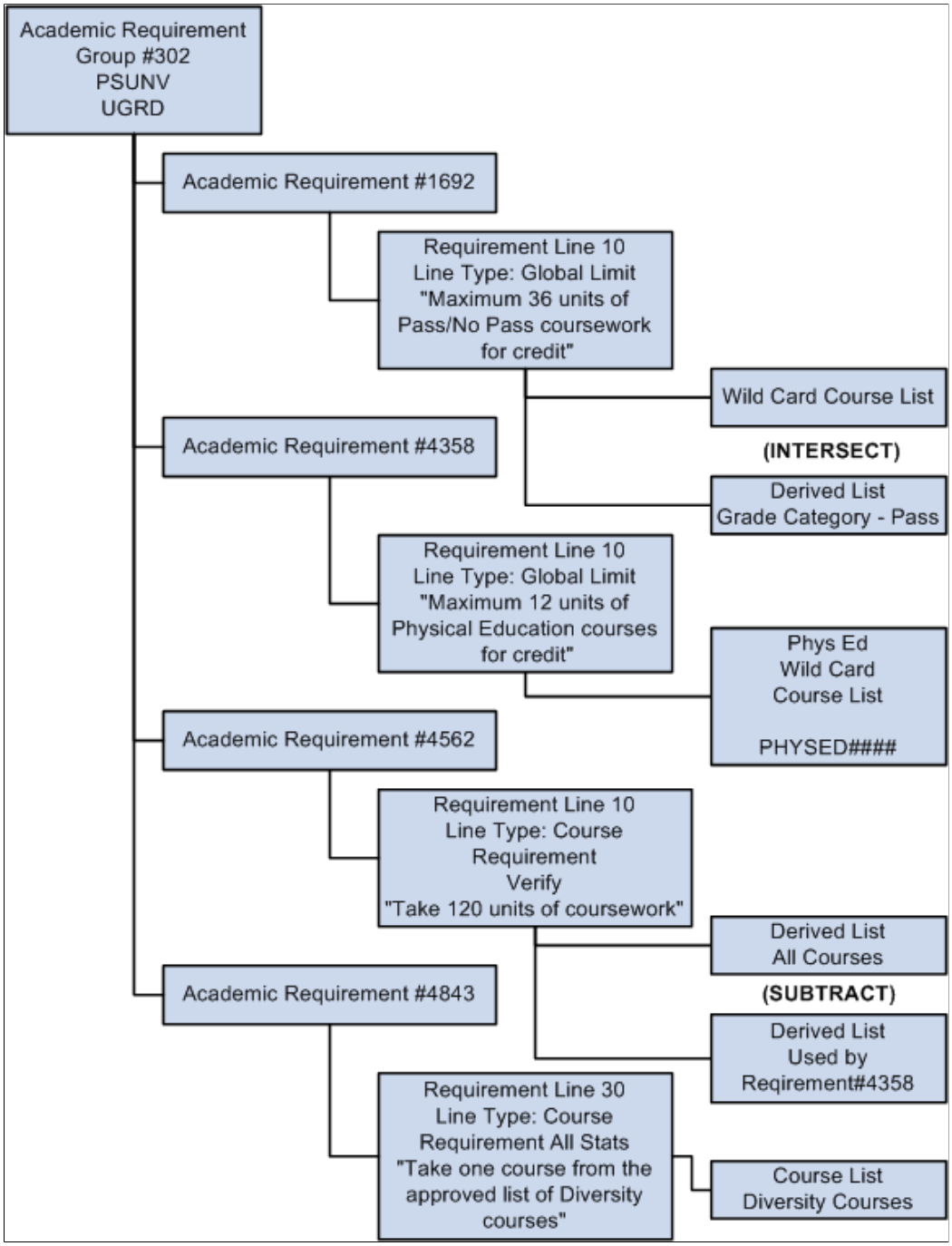
The diagram illustrates how to set up a global sequential restriction requirement.



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Chapter 21

Advisement Report Result Tables

Understanding Advisement Report Result Tables

The Advisement Report Result Tables allow for easier customization of advisement reports.

The primary key on all records has the EMPLID, ANALYSIS_DB_SEQ, and SAA_CAREER_RPT fields. All records that contain "order specific" information from a specific report have the field SAA_ENTRY_SEQ as a key. In the Report Results tables, this key is used consistently throughout the processing, always keeping the results table (SAA_ADB_RESULTS) matched against the child tables such as courses used (SAA_ADB_CRSEUSE) and conditions used (SAA_ADB_CONDUSE).

The table SAA_ADB_REPORT contains the primary unique index plus 4 alternate search keys: INSTITUTION, TSCRPT_TYPE, RPT_DATE, and SAA_RPT_IDENTIFIER. These search keys will be needed when trying to identify the correct report from the on-line process. These alternate keys (with the exception of INSTITUTION) are also carried down into the child records. These indexes are used by the purge process. In the listing below, the primary index is listed as "Pri" and any alternate index is listed as "Alt".

SAA_ADB_CONDUSE

This table contains the values of a condition used as a Condition Requirement. It does not contain the values and results from pre-conditions.

Field	*Type*	*Length*	*Decimal*	*Index*	*Idx Pos*	*Asc/Desc*
EMPLID	Char	11	0	Pri	1	Asc
ANALYSIS_DB_SEQ	Nbr	4	0	Pri	2	Desc
SAA_CAREER_RPT	Char	4	0	Pri	3	Asc
SAA_ENTRY_SEQ	Nbr	4	0	Pri	4	Asc
SAA_CONDITION_SEQ	Nbr	3	0	Pri	5	Asc

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
RPT_DATE	Date	10	0	Alt	1	Asc
TSCRPT_TYPE	Char	5	0	Alt	1	Asc
SAA_RPT_ IDENTIFIER	Char	10	0	Alt	1	Asc
RQRMNT_ GROUP	Char	6	0	Not applicable (NA)	NA	NA
RQ_GRP_LINE _NBR	Char	4	0	NA	NA	NA
REQUIREMENT	Char	9	0	NA	NA	NA
RQ_LINE_ NBR	Char	4	0	NA	NA	NA
CONDITION_ CODE	Char	3	0	NA	NA	NA
CONDITION_ OPERATOR	Char	2	0	NA	NA	NA
CONDITION_ DATA	Char	10	0	NA	NA	NA
ENTRY_R_ STATUS	Char	4	0	NA	NA	NA

SAA_ADB_COURSES

This table contains the transcript and substitution data for a course.

Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
EMPLID	Char	11	0	Pri	1	Asc
ANALYSIS_ DB_SEQ	Nbr	4	0	Pri	2	Desc

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Field	*Type*	*Length*	*Decimal*	*Index*	*Idx Pos*	*Asc/Desc*
SAA_CAREER_RPT	Char	4	0	Pri	3	Asc
CRSE_TAG	Char	4	0	Pri	4	Asc
RPT_DATE	Date	10	0	Alt	1	Asc
TSCRPT_TYPE	Char	5	0	Alt	1	Asc
SAA_RPT_IDENTIFIER	Char	10	0	Alt	1	Asc
INSTITUTION	Char	5	0	Not applicable (NA)	NA	NA
SRC_INSTITUTION	Char	5	0	NA	NA	NA
ACAD_CAREER	Char	4	0	NA	NA	NA
SRC_CAREER	Char	4	0	NA	NA	NA
CRSE_CAREER	Char	4	0	NA	NA	NA
STRM	Char	4	0	NA	NA	NA
APPLIED_TERM	Char	4	0	NA	NA	NA
TERM_TAKEN	Char	4	0	NA	NA	NA
CLASS_NBR	Nbr	5	0	NA	NA	NA
STDNT_ENRL_STATUS	Char	2	0	NA	NA	NA
UNT_TAKEN	Nbr	6	2	NA	NA	NA
UNT_EARNED	Nbr	6	2	NA	NA	NA
UNT_PRGRSS	Nbr	6	2	NA	NA	NA

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
GRADING_ BASIS_ENRL	Char	3	0	NA	NA	NA
CRSE_GRADE _OFF	Char	3	0	NA	NA	NA
REPEAT_ CODE	Char	4	0	NA	NA	NA
ASSOCIATED_ CLASS	Nbr	4	0	NA	NA	NA
AUDIT_ GRADE_ BASIS	Char	1	0	NA	NA	NA NA
EARN_ CREDIT	Char	1	0	NA	NA	NA
INCLUDE_IN_ GPA	Char	1	0	NA	NA	NA
UNITS_ ATTEMPTED	Char	1	0	NA	NA	NA
GRADE_ POINTS	Nbr	10	3	NA	NA	NA
CRSE_ID	Char	6	0	NA	NA	NA
CRSE_OFFER _NBR	Nbr	2	0	NA	NA	NA
SESSION_ CODE	Char	3	0	NA	NA	NA
CLASS_ SECTION	Char	4	0	NA	NA	NA
ACAD_ GROUP	Char	5	0	NA	NA	NA
SUBJECT	Char	8	0	NA	NA	NA

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
CATALOG_NBR	Char	10	0	NA	NA	NA
DESCR	Char	30	0	NA	NA	NA
SSR_COMPONENT	Char	3	0	NA	NA	NA
CRS_TOPIC_ID	Nbr	3	0	NA	NA	NA
SAA_DISPLAY_TOPIC	Char	1	0	NA	NA	NA
EQUIV_CRSE_ID	Char	5	0	NA	NA	NA
OVRD_CRSE_EQUIV_ID	Char	1	0	NA	NA	NA
START_DT	Date	10	0	NA	NA	NA
END_DT	Date	10	0	NA	NA	NA
CRSE_COUNT	Nbr	5	2	NA	NA	NA
CLASS_ENRL_TYPE	Char	1	0	NA	NA	NA
SAA_CRSE_TYPE	Char	1	0	NA	NA	NA
RQ_SCHOOL_TYPE	Char	4	0	NA	NA	NA
GRADE_CATEGORY	Char	4	0	NA	NA	NA
VALID_ATTEMPT	Char	1	0	NA	NA	NA
GRD_PTS_PER_UNIT	Nbr	10	3	NA	NA	NA

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
RQMNT_ DESIGNTN	Char	4	0	NA	NA	NA
SUB_ACAD_ GROUP	Char	5	0	NA	NA	NA
SUB_CRSE_ID	Char	6	0	NA	NA	NA
SUB_SUBJECT	Char	8	0	NA	NA	NA
SUB_CATLG_ NBR	Char	10	0	NA	NA	NA
SAA_SUB_ DESCR	Char	30	0	NA	NA	NA
OPRID	Char	30	0	NA	NA	NA
SAA_OPRID_ NAME	Char	50	0	NA	NA	NA
SAA_DISPLAY _OPTION	Char	1	0	NA	NA	NA
STDNT_SUB_ NBR	Char	4	0	NA	NA	NA
DESCR254A	Char	254	0	NA	NA	NA

SAA_ADB_CRSEAVL

This table contains the courses that would be displayed in the Display Select Line in an advisement report. The field SAA_WHERE_DETAIL contains the filter needed to pull in courses, whether it is one course or a wildcard course.

Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
EMPLID	Char	11	0	Pri	1	Asc
ANALYSIS_ DB_SEQ	Nbr	4	0	Pri	2	Desc

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Field	*Type*	*Length*	*Decimal*	*Index*	*Idx Pos*	*Asc/Desc*
SAA_CAREER_RPT	Char	4	0	Pri	3	Asc
SAA_ENTRY_SEQ	Nbr	4	0	Pri	4	Asc
SAA_COURSE_SEQ	Nbr	3	0	Pri	5	Asc
RPT_DATE	Date	10	0	Alt	1	Asc
TSCRPT_TYPE	Char	5	0	Alt	1	Asc
SAA_RPT_IDENTIFIER	Char	10	0	Alt	1	Asc
COURSE_LIST	Char	9	0	Not applicable (NA)	NA	NA
EFFDT	Date	10	0	NA	NA	NA
R_COURSE_SEQUENCE	Nbr	7	0	NA	NA	NA
RQRMNT_GROUP	Char	6	0	NA	NA	NA
RQ_GRP_LINE_NBR	Char	4	0	NA	NA	NA
REQUIREMENT	Char	9	0	NA	NA	NA
RQ_LINE_NBR	Char	4	0	NA	NA	NA
SUBJECT	Char	8	0	NA	NA	NA
CATALOG_NBR	Char	10	0	NA	NA	NA
CRSE_ID	Char	6	0	NA	NA	NA
CRS_TOPIC_ID	Nbr	3	0	NA	NA	NA

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
RQMNT_ DESIGNTN	Char	4	0	NA	NA	NA
DESCR	Char	30	0	NA	NA	NA
SAA_WHERE_ DETAIL	Char	100	0	NA	NA	NA

SAA_ADB_CRSEUSE

This table contains the courses that are used in processing the requirements. The courses can be from an All-Stats, Verify, or Limit line.

Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
EMPLID	Char	11	0	Pri	1	Asc
ANALYSIS_ DB_SEQ	Nbr	4	0	Pri	2	Desc
SAA_CAREER _RPT	Char	4	0	Pri	3	Asc
SAA_ENTRY_ SEQ	Nbr	4	0	Pri	4	Asc
SAA_COURSE _SEQ	Nbr	3	0	Pri	5	Asc
CRSE_TAG	Char	4	0	Pri	6	Asc
RPT_DATE	Date	10	0	Alt	1	Asc
TSCRPT_TYPE	Char	5	0	Alt	1	Asc
SAA_RPT_ IDENTIFIER	Char	10	0	Alt	1	Asc
RQRMNT_ GROUP	Char	6	0	Not applicable (NA)	NA	NA

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
RQ_GRP_LINE_NBR	Char	4	0	NA	NA	NA
REQUIREMENT	Char	9	0	NA	NA	NA
RQ_LINE_NBR	Char	4	0	NA	NA	NA
SEL_PROCESS_TYPE	Char	3	0	NA	NA	NA
SEL_MODE	Char	1	0	NA	NA	NA
IN_PROGRESS_GRD	Char	1	0	NA	NA	NA
UNT_TAKEN	Nbr	6	2	NA	NA	NA
UNT_EARNED	Nbr	6	2	NA	NA	NA
CRSE_COUNT	Nbr	5	2	NA	NA	NA
RQ_AA_OVERRIDE	Char	9	0	NA	NA	NA
ASOF_DATE	Date	10	0	NA	NA	NA
DIRCT_TYPE	Char	1	0	NA	NA	NA
SAA_DISPLAY_OPTION	Char	1	0	NA	NA	NA
SAA_OPRID_NAME	Char	50	0	NA	NA	NA
OPRID	Char	30	0	NA	NA	NA
DESCR254A	Char	254	0	NA	NA	NA

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SAA_ADB_REPORT

This table contains the courses that are used in processing the requirements. The courses can be from an All-Stats, Verify, or Limit line.

Field	*Type*	*Length*	*Decimal*	*Index*	*Idx Pos*	*Asc/Desc*
EMPLID	Char	11	0	Pri	1	Asc
ANALYSIS_ DB_SEQ	Nbr	4	0	Pri	2	Desc
SAA_CAREER _RPT	Char	4	0	Pri	3	Asc
RPT_DATE	Date	10	0	Alt	1	Desc
RPT_TYPE	Char	4	0	Not applicable (NA)	NA	NA
SAA_RPT_ IDENTIFIER	Char	10	0	Alt	1	Asc
INSTITUTION	Char	5	0	Alt	1	Asc
TSCRPT_TYPE	Char	5	0	Alt	1	Asc
WHAT_IF_FL	Char	1	0	NA	NA	NA
ASOF_DATE	Date	10	0	NA	NA	NA
REPORT_ REQUEST_ NBR	Char	9	0	NA	NA	NA
SAA_RPT_ DTTM_STAMP	NULL	26	0	NA	NA	NA

SAA_ADB_RESULTS

This table contains detail information about Requirement Group, Requirements, Requirement Lines, Careers, Program, Plans, Subplans, Overrides, and Statistical Information about each area.

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Field	*Type*	*Length*	*Decimal*	*Index*	*Idx Pos*	*Asc/Desc*
EMPLID	Char	11	0	Pri	1	Asc
ANALYSIS_ DB_SEQ	Nbr	4	0	Pri	2	Desc
SAA_CAREER _RPT	Char	4	0	Pri	3	Asc
SAA_ENTRY_ SEQ	Nbr	4	0	Pri	4	Asc
RPT_DATE	Date	10	0	Alt	1	Asc
TSCRPT_TYPE	Char	5	0	Alt	1	Asc
SAA_RPT_ IDENTIFIER	Char	10	0	Alt	1	Asc
ENTRY_R_ TYPE	Char	6	0	Not applicable (NA)	NA	NA
ACAD_ CAREER	Char	4	0	NA	NA	NA
ACAD_PROG	Char	5	0	NA	NA	NA
ACAD_PLAN	Char	10	0	NA	NA	NA
ACAD_SUB_ PLAN	Char	10	0	NA	NA	NA
RQ_DATE	Date	10	0	NA	NA	NA
RQRMNT_ GROUP	Char	6	0	NA	NA	NA
RQ_GRP_LINE _NBR	Char	4	0	NA	NA	NA
REQUIREMENT	Char	9	0	NA	NA	NA
RQ_LINE_ NBR	Char	4	0	NA	NA	NA

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Field	*Type*	*Length*	*Decimal*	*Index*	*Idx Pos*	*Asc/Desc*
RQRMNT_ LIST_SEQ	Nbr	3	0	NA	NA	NA
RQ_GRP_LINE _TYPE	Char	4	0	NA	NA	NA
REQ_LINE_ TYPE	Char	3	0	NA	NA	NA
DISP_SELECT _LINE	Char	1	0	NA	NA	NA
PARTITION_ FAIL	Char	1	0	NA	NA	NA
UNITS_ REQUIRED	Nbr	7	2	NA	NA	NA
SAA_UNITS_ USED	Nbr	7	2	NA	NA	NA
UNITS_ NEEDED	Nbr	7	2	NA	NA	NA
CRSES_ REQUIRED	Nbr	7	2	NA	NA	NA
SAA_CRSES_ USED	Nbr	7	2	NA	NA	NA
CRSES_ NEEDED	Nbr	7	2	NA	NA	NA
SAA_CRSE_ COUNT	Nbr	4	0	NA	NA	NA
GPA_ REQUIRED	Nbr	7	3	NA	NA	NA
GPA_ACTUAL	Nbr	7	3	NA	NA	NA
RQ_AA_ OVERRIDE	Char	9	0	NA	NA	NA
ASOF_DATE	Date	10	0	NA	NA	NA

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
RQ_OVRD_ ACTION	Char	4	0	NA	NA	NA
OLD_MIN_ UNITS	Nbr	7	2	NA	NA	NA
NEW_MIN_ UNITS	Nbr	7	2	NA	NA	NA
OLD_MAX_ UNITS	Nbr	7	2	NA	NA	NA
NEW_MAX_ UNITS	Nbr	7	2	NA	NA	NA
OLD_MIN_ CRSES	Nbr	7	2	NA	NA	NA
NEW_MIN_ CRSES	Nbr	7	2	NA	NA	NA
OLD_MAX_ CRSES	Nbr	7	2	NA	NA	NA
NEW_MAX_ CRSES	Nbr	7	2	NA	NA	NA
REF_RQMT_ GROUP	Char	6	0	NA	NA	NA
REF_ REQUIREMENT	Char	9	0	NA	NA	NA
ITEM_R_ STATUS	Char	4	0	NA	NA	NA
SAA_PRINT_ CNTL	Char	4	0	NA	NA	NA
SAA_DISPLAY _OPTION	Char	1	0	NA	NA	NA
SAA_DISPLAY _GPA	Char	1	0	NA	NA	NA

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
SAA_DISPLAY_UNITS	Char	1	0	NA	NA	NA
SAA_DISPLAY_CRSCNT	Char	1	0	NA	NA	NA
OPRID	Char	30	0	NA	NA	NA
SAA_OPRID_NAME	Char	50	0	NA	NA	NA
DESCR254A	Char	254	0	NA	NA	NA
SAA_HIDE_STATUS	Char	1	0	NA	NA	NA

SAA_ADB_RQDPLAN

This table contains the information about all required plans for a specific requirement group.

Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
EMPLID	Char	11	0	Pri	1	Asc
ANALYSIS_DB_SEQ	Nbr	4	0	Pri	2	Desc
SAA_CAREER_RPT	Char	4	0	Pri	3	Asc
SAA_ENTRY_SEQ	Nbr	4	0	Pri	4	Asc
SAA_RQDPLN_SEQ	Nbr	4	0	Pri	5	Asc
RPT_DATE	Date	10	0	Alt	1	Asc
TSCRPT_TYPE	Char	5	0	Alt	1	Asc

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
SAA_RPT_ IDENTIFIER	Char	10	0	Alt	1	Asc
RQRMNT_ GROUP	Char	6	0	Not applicable (NA)	NA	NA
PLANS_ NEEDED	Nbr	3	0	NA	NA	NA
ACAD_ CAREER	Char	4	0	NA	NA	NA
ACAD_PROG	Char	5	0	NA	NA	NA
ACAD_PLAN	Char	10	0	NA	NA	NA
ACAD_SUB_ PLAN	Char	10	0	NA	NA	NA

SAA_ADB_WHATIF

This table contains student's academic structure information used in the report. This data is for all reports, not just what-if reports.

Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
EMPLID	Char	11	0	Pri	1	Asc
ANALYSIS_ DB_SEQ	Nbr	4	0	Pri	2	Desc
SAA_CAREER _RPT	Char	4	0	Pri	3	Asc
SAA_WHATIF _SEQ	Nbr	3	0	Pri	4	Asc
RPT_DATE	Date	10	0	Alt	1	Asc
TSCRPT_TYPE	Char	5	0	Alt	1	Asc

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Field	Type	Length	Decimal	Index	Idx Pos	Asc/Desc
SAA_RPT_ IDENTIFIER	Char	10	0	Alt	1	Asc
ACAD_ CAREER	Char	4	0	Not applicable (NA)	NA	NA
CAR_REQ_ TERM	Char	4	0	NA	NA	NA
STDNT_CAR_ NBR	Nbr	3	0	NA	NA	NA
ACAD_PROG	Char	5	0	NA	NA	NA
ACAD_PROG_ TERM	Char	4	0	NA	NA	NA
PLAN_ SEQUENCE	Nbr	2	0	NA	NA	NA
ACAD_PLAN	Char	10	0	NA	NA	NA
ACAD_PLAN_ TERM	Char	4	0	NA	NA	NA
SUB_PLAN_ SEQUENCE	Nbr	2	0	NA	NA	NA
ACAD_SUB_ PLAN	Char	10	0	NA	NA	NA
ACAD_SUB_ PLAN_TERM	Char	4	0	NA	NA	NA

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Chapter 22

Academic Advisement Reports

Academic Advisement Reports: A to Z

This table lists the Academic Advisement reports, sorted by report ID.

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
SAA_BATCH_DS Advising Batch Report Print	The batch report prints advisement reports for all students who meet the criteria on the run control page. (BI Publisher)	**Academic Advisement** >**Advising Processes** >**Print Batch Reports**	SAA_RC_RPTPRINT
SRCNDTBL Condition Table Report	The condition table report lists all the dynamic conditions for the institution as of the **As of Date** field value. (SQR)	**Academic Advisement** >**Advising Reports** >**Miscellaneous Reports**	RUNCTL_SRMISRPT
SRDBTBLS Database Tables report	The database tables report lists all data stored in each of the Analysis Database (R_*) tables for a specific student for a specific advisement transcript type on a specific date. These tables are only populated by running the advisement transcript report and selecting the Analysis Database report format. (SQR)	**Academic Advisement** >**Advising Reports** >**Database Tables**	RUNCTL_SRDBTBLS
SRETYGRP Entity Group Table Report	The entity group table report lists all the entity groups for the institution as of the **As of Date** field value. (SQR)	**Academic Advisement** >**Advising Reports** >**Miscellaneous Reports**	RUNCTL_SRMISRPT

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Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
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 Advisement >Advisement Reports >Academic Requirement Group**	RUNCTL_SRGRPADV
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 Advisement >Advisement 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 Advisement >Advisement Reports >Academic Requirement**	RUNCTL_SRRQRADV

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Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
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 Student Records application. (SQR)	**Records and Enrollment** >**Transcripts Batch Transcripts** >**Transcript Print**	RUNCTL_SRTRPRINT

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