

PeopleSoft®

PeopleSoft 8 SP1
Academic Advisement PeopleBook

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Contents

General Preface

About This PeopleBookix

PeopleSoft Application Prerequisites.....ix

PeopleSoft Application Fundamentals.....ix

Related Documentation.....x

 Obtaining Documentation Updates.....x

 Ordering Printed Documentation.....x

Typographical Conventions and Visual Cues.....xi

 Typographical Conventions.....xi

 Visual Cues.....xii

Comments and Suggestions.....xiii

Common Elements in These PeopleBooks.....xiii

Preface

PeopleSoft Academic Advisement Preface.....xv

PeopleSoft Application Fundamentals.....xv

Chapter 1

Getting Started With PeopleSoft Academic Advisement.....1

Introducing PeopleSoft Academic Advisement.....1

Understanding Academic Advisement Concepts.....1

Outlining the Academic Structure of an Institution.....4

Calculating Grade Point Averages in PeopleSoft Academic Advisement.....7

PeopleSoft Academic Advisement Implementation.....8

 Setting Up PeopleSoft Academic Advisement Tables.....9

Chapter 2

Setting Up Optional Advisement Data.....11

Setting Up Grade Category Values.....11

 Pages Used to Set Up Grade Category Values.....11

 Entering Grade Category Values.....11

Setting Up Cumulative GPA Values.....13

 Pages Used to Set Up Cumulative GPA Values.....13

Entering Cumulative GPA Values.....	13
Setting Up Special Requirement Usage Values.....	14
Understanding Requirement Usage Values.....	15
Pages Used to Set Up Special Requirement Usage Values.....	16
Entering Requirement Usage Values.....	16

Chapter 3

Setting Up Academic Course Lists.....	19
Setting Up an Academic Course List.....	19
Pages Used to Create an Academic Course List.....	19
Setting Up a Course List Description.....	19
Creating a Course List Detail.....	21
Establishing Course List Parameters.....	25

Chapter 4

Setting Up Academic Requirements.....	29
Setting Up Academic Requirements.....	29
Prerequisites.....	29
Common Elements Used in This Chapter.....	29
Pages Used to Set Up Academic Requirements.....	31
Defining Academic Requirements.....	31
Establishing Requirement Parameters.....	36
Creating a Requirement Line Item.....	52
Specifying Requirement Line Item Parameters.....	57
Setting Up a Requirement Line Item Detail.....	66

Chapter 5

Setting Up Academic Requirement Groups.....	81
Understanding Academic Requirement Groups.....	81
Reporting Sequences of 900 and Greater.....	82
Multiple Programs, Plans, and Sub-Plans.....	83
Altering Academic Structure Processing.....	83
Setting Up an Academic Requirement Group.....	84
Pages Used to Set Up an Academic Requirement Group.....	85
Setting Up Requirement Groups.....	86
Establishing Requirement Group Parameters.....	94
Defining the Requirement Group Detail.....	100

Setting Up the Requirement Group Detail Parameters.....	105
Specifying Required Plans and Sub-Plans.....	108
Identifying Appended Requirement Groups.....	110

Chapter 6

Reviewing the Requirement Group, Requirement, and Course List Summaries.....	113
Reviewing Academic Requirement Group Summaries.....	113
Pages Used to Review Academic Requirement Group Summaries.....	114
Reviewing Academic Requirement Summaries.....	115
Reviewing Advisement Course List Summaries.....	115
Pages Used to Review Advisement Course List Summaries.....	116

Chapter 7

Sharing Courses.....	117
Understanding Course Sharing.....	117
Setting Up Course Share Sets.....	117
Pages Used to Set Up Course Share Sets.....	118
Establishing Course Share Sets.....	118

Chapter 8

Using Advisement Overrides and Course Substitutions.....	123
Understanding Advisement Overrides and Course Substitutions.....	123
Prerequisites.....	123
Setting Up Course Directives and Advisement Overrides.....	124
Understanding Course Directive and Advisement Override Setup.....	124
Pages Used to Set Up Course Directives and Overrides.....	124
Creating Advisement Overrides.....	124
Creating Override Details on the From Page.....	127
Creating Override Details on the To Page.....	127
Defining Course Substitutions.....	129
Understanding Course Substitutions.....	129
Page Used to Define Course Substitutions.....	129
Using the Course Substitution Page.....	129

Chapter 9

Creating and Using Expanded Conditions and Custom Conditions.....	133
Defining Expanded Conditions.....	133
Understanding Expanded Conditions.....	133
Pages Used to Manage Expanded Conditions.....	134
Defining Academic Entity Groups.....	134
Defining Dynamic Conditions.....	136
Establishing Condition Parameters.....	140
Specifying Condition Controls.....	142
Defining Custom Conditions.....	143
Understanding Custom Conditions.....	144
Page Used to Establish Custom Conditions.....	145
Creating Custom Condition Processes.....	145

Chapter 10

Maintaining Academic Advisement Setup Data.....	151
Prerequisite.....	151
Producing an Advisement Group Summary Report.....	151
Understanding the Advisement Group Summary Report.....	151
Pages Used to Produce an Advisement Group Summary Report.....	152
Generating an Advisement Group Summary Report.....	152
Defining Advisement Group Summary Print Options.....	154
Producing a Database Tables Report.....	157
Prerequisite.....	157
Pages Used to Produce a Database Tables Report.....	157
Entering Database Table Information.....	157
Producing Entity Group Table and Condition Table Reports.....	158
Pages Used to Produce Entity Group Table and Condition Table Reports.....	158
Entering Entity Group and Condition Report Parameters.....	158
Producing a Requirement Advisement Report.....	159
Pages Used to Create a Requirement Advisement Report.....	159
Defining the Requirement Advisement Report Parameters.....	159
Defining Requirement Advisement Print Options.....	161
Producing a Reverse Engineering Report.....	163
Pages Used to Produce a Reverse Engineering Report.....	163
Entering Reverse Engineering Report Parameters.....	163

Chapter 11

Processing Academic Advising Reports.....	167
Understanding Online and Batch Advising Reports.....	167
Prerequisites.....	167
Producing an Online Academic Advisement Transcript Report.....	168
Pages Used to Create an Online Academic Advising Report.....	169
Defining the Request Header.....	169
Selecting Advising Transcripts for Processing.....	173
Send To Information Page.....	174
Viewing and Printing Advising Report Results.....	175
Checking for Report Errors.....	176
Producing a Batch Academic Advisement Transcript Report.....	176
Producing Quick What-If and Stored What-If Advisement Reports.....	177
Understanding Quick What-If and Stored What-If Advisement Reports.....	177
Pages Used to Define What-If Scenarios.....	178
Selecting the Course List What-If Option.....	178
Entering a What-if Course.....	179
Entering Quick What-If Parameters.....	179
Defining a Stored What-if Program for a Student.....	180
Defining a Stored What-if Plan for a Student.....	182
Defining a Stored What-if Sub-Plan for a Student.....	184
Processing Self-Service Advising Reports.....	185
Prerequisites.....	185
Pages Used to Perform Self-Service Advising.....	186

Chapter 12

Using the Analysis Database to Create User Configurable Reports.....	187
Understanding the Analysis Database.....	187
Populating the Analysis Database Tables.....	188
Printing the Contents of the Analysis Database.....	189
Pages Used to Print the Contents of the Analysis Database.....	189
Processing the Database Tables Report.....	189
Creating a Customized Report Using the Results in the Analysis Database Tables.....	190
Reviewing the Academic Advisement Analysis Database Tables.....	190

Appendix A

Enhancing Performance in PeopleSoft Academic Advisement.....	209
Understanding Advising Performance.....	209

Condition Processing.....210

Course Share Sets and Restrictions.....210

Course Lists and Efficient Wildcard Course Lists.....211

Using the Include Equivalent Courses Option.....211

Relevant Parameters.....212

Transcript Type Setup.....212

Batch Processing.....212

Appendix B

Course Limit Examples.....213

Setting Up a Local Unit, Course, or GPA Limit Requirement.....213

Setting Up a Global Course Limit Requirement.....216

Appendix C

Sequential Restriction Examples.....219

Setting Up a Local Sequential Restriction Requirement.....219

Setting Up a Global Sequential Restriction Requirement.....220

Appendix D

PeopleSoft Academic Advisement Reports.....223

PeopleSoft Academic Advisement Reports: A to Z.....223

Glossary of PeopleSoft Terms.....227

Index239

About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

PeopleSoft Application Prerequisites

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

See *Using PeopleSoft Applications*.

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

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

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

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (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.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>

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 specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Academic Advisement Preface

This preface discusses PeopleSoft application fundamentals.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Academic Advisement PeopleBook* provides implementation and processing information for your PeopleSoft Academic Advisement system. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for Student Administration and Contributor Relations PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the Student Administration Solutions and Contributor Relations Solutions product lines. Whether you are implementing only PeopleSoft Academic Advisement, some combination of applications within the product lines, or the entire PeopleSoft Student Administration Solutions and Contributor Relations Solutions product lines, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

In addition to the *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations PeopleBook*, you should review the *PeopleSoft Campus Community Fundamentals PeopleBook*. This PeopleBook provides an overview of the Campus Community setup tables, and describes many features that are basic building blocks for both PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions.

Note. One or more pages in PeopleSoft Academic Advisement operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Application Fundamentals for Student Administration PeopleBook*.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “PeopleSoft Campus Community Preface”

CHAPTER 1

Getting Started With PeopleSoft Academic Advisement

This chapter provides an overview of PeopleSoft Academic Advisement, and discusses PeopleSoft Academic Advisement implementation tasks.

Introducing PeopleSoft Academic Advisement

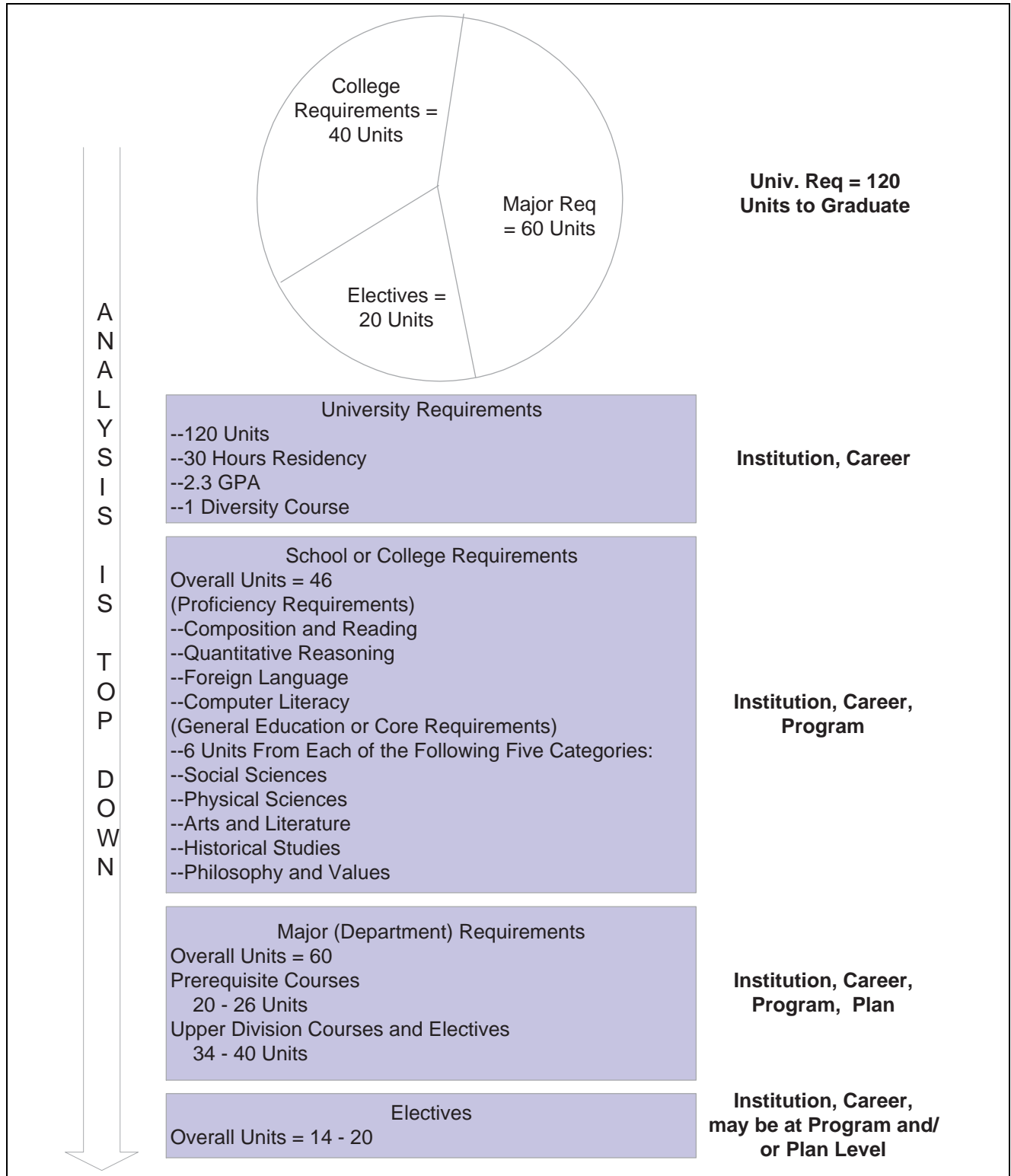
PeopleSoft Academic Advisement is the application within PeopleSoft Student Administration Solutions that is used to track the requirements and policies that a student must satisfy in order to graduate. As a student progresses towards graduation, PeopleSoft Academic Advisement analyzes all courses, restrictions, pre-conditions, and/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 PeopleSoft Academic Advisement pages, this application automatically tracks a student's degree progress. PeopleSoft 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.

Understanding Academic Advisement Concepts

PeopleSoft Academic Advisement is a powerful yet flexible tool because of the underlying concepts used to establish requirements and to execute degree audits. 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/plans). This traditional approach to academic structure is still valid and very necessary; however, while making use of this approach, the PeopleSoft Academic Advisement application is built from the bottom level up (for example, course lists are defined first, followed by academic requirements, then requirement groups). Course lists, requirements, and requirement groups are the building blocks of this versatile and effective degree audit system.

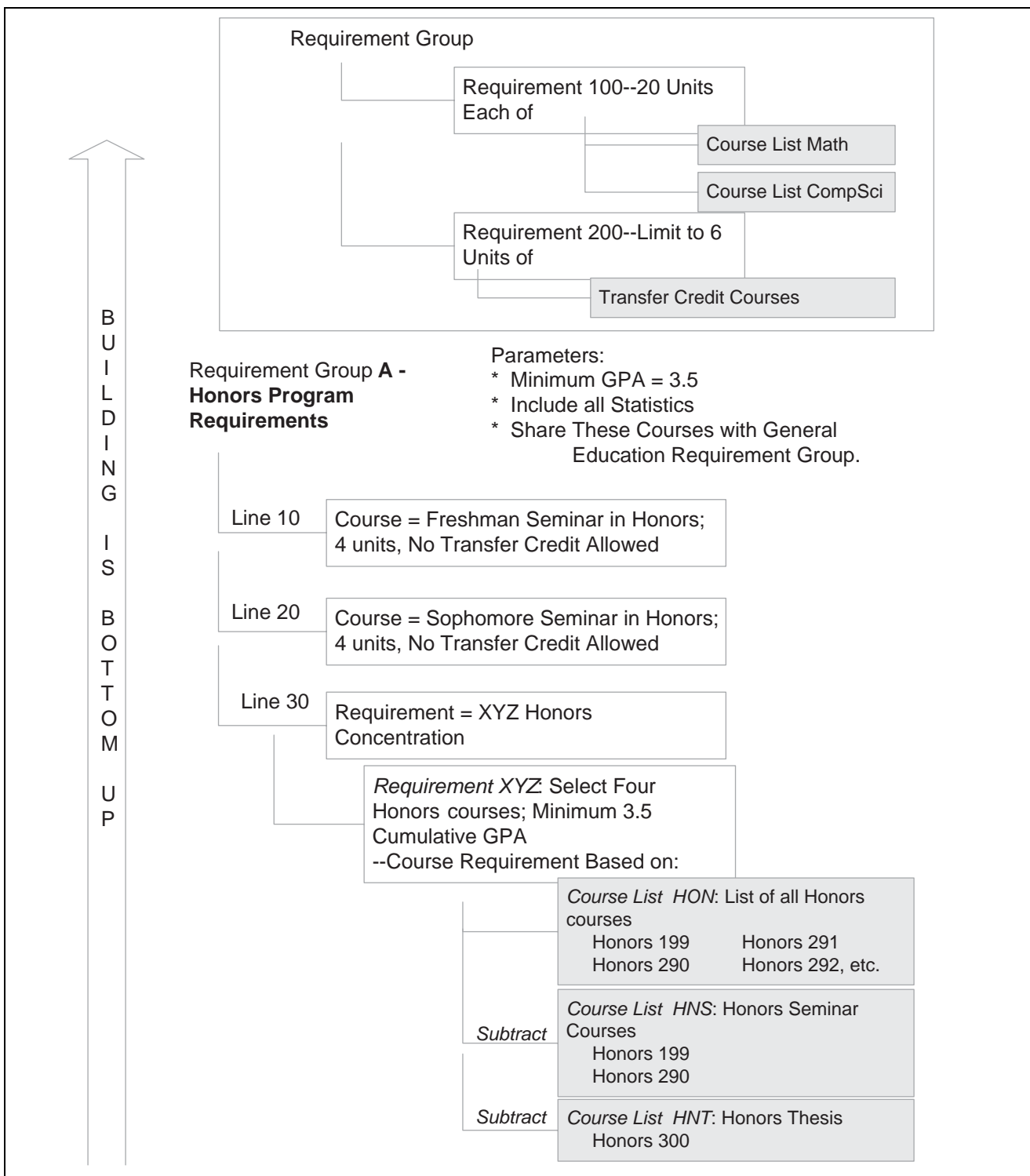
Note. In PeopleSoft Academic Advisement, pages are designed to reflect a conceptual flow. Academic requirement groups consist of academic requirements that are satisfied by course lists. Under Setup, components are listed in this order. However, in order for the academic advisement portion of PeopleSoft Student Administration 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.

In the following diagrams, the traditional concepts of academic structure as well as the PeopleSoft approach to structuring an institution are presented.



Traditional approach to academic advisement concepts (Part 1)

The traditional approach to an institution is shown in the Academic Advisement Concepts (Part 1) diagram. In the Academic Advisement Concepts (Part 2) diagram, course lists, requirements, and requirement groups are presented.



Traditional approach to academic advisement concepts (Part 2)

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 and/or/subtraction/intersection/union.

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.

The next diagram further illustrates how the traditional approach is reflected in the PeopleSoft Academic Advisement application via requirement groups, requirements, and course lists.

Outlining the Academic Structure of an Institution

Before entering any data in the PeopleSoft 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 and/or biological science courses, transfer equivalents, and test equivalents).

In addition, you should take time now to review the setup suggestions and guidelines for enhancing the performance of the advising analysis process.

See [Appendix A, "Enhancing Performance in PeopleSoft Academic Advisement," page 209](#).

Note. 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.
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.

Row	Institution	Career	Program	Plan	Subplan	General Requirement Description	Details
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.
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 in PeopleSoft Academic Advisement

GPA is calculated based on units taken. (Cumulative or overall GPA is calculated by the PeopleSoft Student Records application, not the PeopleSoft Academic Advisement application. In addition, the PeopleSoft 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 PeopleSoft 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/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.

PeopleSoft Academic Advisement Implementation

The relational design of PeopleSoft 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.

In addition, it is important to note that PeopleSoft Academic Advisement shares three of its components with PeopleSoft Student Records. Specifically, the following components call upon the same autonumbering record in the Installation Student Administration 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 Installation Student Administration 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 PeopleSoft Academic Advisement data in a test database, you may inadvertently create data with duplicate record numbers (if you use autonumbering). This will cause serious problems when you attempt to merge the two sets of data into one database.

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

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, “Reviewing Your Installation Setup and System Defaults,” Reviewing Incremental Numbering

Setting Up PeopleSoft Academic Advisement Tables

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

Generally, organizations implement these business processes first. We discuss these business processes in the business process chapters of this PeopleBook.

Step	Reference
1. Define PeopleSoft Student Records data.	<i>PeopleSoft 8 SP1 Student Records PeopleBook</i>
2. Define PeopleSoft Academic Advisement installation options.	<i>PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook</i> , “Reviewing Your Installation Setup and System Defaults”
3. Define grade category values.	Chapter 2, “Setting Up Optional Advisement Data,” Setting Up Grade Category Values, page 11
4. Define cumulative GPA values.	Chapter 2, “Setting Up Optional Advisement Data,” Setting Up Cumulative GPA Values, page 13
5. Define special requirement usage values.	Chapter 2, “Setting Up Optional Advisement Data,” Setting Up Special Requirement Usage Values, page 14
6. Define advising transcript types.	<ul style="list-style-type: none"> Chapter 11, “Processing Academic Advising Reports,” Producing Quick What-If and Stored What-If Advisement Reports, page 177 <i>PeopleSoft 8 SP1 Student Records PeopleBook</i>, “Setting Up Transcripts,” Designating Degree and Program Data
7. Define academic course lists.	Chapter 3, “Setting Up Academic Course Lists,” page 19
8. Define academic requirements.	Chapter 4, “Setting Up Academic Requirements,” page 29
9. Define academic requirement groups.	Chapter 5, “Setting Up Academic Requirement Groups,” page 81
10. Define course share sets.	Chapter 7, “Sharing Courses,” page 117
11. Define dynamic conditions and entity groups.	Chapter 9, “Creating and Using Expanded Conditions and Custom Conditions,” page 133
12. Define student exceptions and overrides.	Chapter 8, “Using Advisement Overrides and Course Substitutions,” page 123
13. (Optional) Define self-service advising options.	Chapter 11, “Processing Academic Advising Reports,” Processing Self-Service Advising Reports, page 185

CHAPTER 2

Setting Up Optional Advisement Data

This chapter discusses how to:

- Set up grade category values.
- Set up cumulative grade point average values.
- Set up special requirement usage values for special reporting and overrides.

Setting Up Grade Category Values

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

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Grading,” Defining Grading Schemes

Chapter 4, “Setting Up Academic Requirements,” Setting Up a Requirement Line Item Detail, page 66

Pages Used to Set Up Grade Category Values

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

Entering Grade Category Values

Access the Grade Category Table page.

Grade Category Table

[View All](#) First ◀ 1 of 1 ▶ Last

SetID: PSUNV ***Effective Date:** 01/01/1900

***Status:** Active

*Grade Category	*Description		
NONE	NONE		
PASS	PASS		
XFER	XFER		

Grade Category Table page

Important! Set up one grade category for every setID at your institution. For every table and effective-dated row that is created, a Grade Category of *None* should be included. Since Grade Category is a required field on the Grading Scheme table, a field value of *None* can be used in the Grading Scheme table for those grades that do not need any particular value.

Grade Category

Enter the grade category that will become a prompt value on the Line Item Detail page and 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 you want associated with the grade category value. This is the description that appears when a field is prompted for field values. The system populates the grade category value in the Description column by default. However, you can change this value. All alphanumeric characters are valid.

Be sure to use a value that clearly describes the grade category value. It is recommended that you use the actual grade category for the description. However, 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 towards a Bachelor's degree is limited to 24 units. In addition, the total number of Pass grades that may be transferred in from a community college that can count towards a Bachelor's degree is limited to 6 units. A total of 24 Pass credits are allowed, but only 6 or fewer of those 24 Pass units can be from another institution.

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

In the PeopleSoft Academic Advisement application, you then create a requirement that is a global limit. It points to all courses on a student's transcript with a grade that has grade category of P combined with TP (Line Detail Type of *DLST* with List Recall Mode of *Grade Category = P* U Line Detail Type of *DLST* with List Recall Mode of *Grade Category = TP*) on the Requirement Line Item Detail page. The limit allows a maximum of 24 units. A second requirement that is also a global limit is then created that 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 towards the degree.

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

Setting Up Cumulative GPA Values

You can use the Cumulative GPA page to establish new cumulative GPA prompt values for the cumulative GPA field value that can be used as a pre-condition or condition throughout academic advisement. These values also appear on certain advisement reports.

Pages Used to Set Up Cumulative GPA Values

Page Name	Object Name	Navigation	Usage
Cum. Grade Pt. Average Table (cumulative grade point average table)	CUMULTV_GPA	Design Student Administration, Define Student Administration, Setup, Cum. Grade Pt. Average Table, Cumulative GPA	Establish new cumulative GPA prompt values for the cumulative GPA field value.

Entering Cumulative GPA Values

Access the Cum. Grade Pt. Average Table page.

Cum. Grade Pt. Average Table

View All First ◀ 1 of 1 ▶ Last

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

Cumulative GPA	Description	
<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	
<input type="text" value="0.5"/>	<input type="text" value="0.5"/>	
<input type="text" value="1.0"/>	<input type="text" value="1.0"/>	
<input type="text" value="1.5"/>	<input type="text" value="1.5"/>	
<input type="text" value="2.0"/>	<input type="text" value="2.0"/>	
<input type="text" value="2.5"/>	<input type="text" value="2.5"/>	
<input type="text" value="3.0"/>	<input type="text" value="3.0"/>	
<input type="text" value="3.5"/>	<input type="text" value="3.5"/>	
<input type="text" value="4.0"/>	<input type="text" value="4.0"/>	

Cum. Grade Pt. Average Table page

- Academic Institution** Each cumulative GPA prompt value is associated with only one Academic Institution. (This field is used for prompting, not analysis.)
- Cumulative GPA** Enter the cumulative GPA that is a prompt value for pre-conditions or conditions of Cumulative Grade Point Average. Valid numbers 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 you want to associate with the Cumulative GPA value. This is the description that appears when a field is prompted for field values. The system populates the Description column by default to the cumulative GPA value. However, you can change this value. All alphanumeric characters are valid.
- Be sure to use a value that clearly describes the Cumulative GPA value. It is recommended that you use the actual cumulative GPA for the description. However, you might want to describe a cumulative GPA of 2.0 as *C average*. In that case, the prompt value appears as *C average*.

Setting Up Special Requirement Usage Values

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

Understanding Requirement Usage Values

In the majority of instances, you will likely run academic advising reports for your students. Academic advising reports track a student's progress towards graduation, based on their particular career, program, plan, sub-plan, and requirement term data.

However, there may be instances where you want to evaluate a group of students based on some different set of criteria. Perhaps you want to evaluate the semester grade point average and academic load for all students in a student group of "Athlete." Or, perhaps you'd like to evaluate the grade point average of coursework in Accounting 1a and Accounting 2a for all Pre-Business majors (to identify those with high grades in these areas, and to inquire if they might be interested in pursuing a degree in the Accounting program.) You can do this by creating special academic requirement groups that reference a user defined requirement usage. The system will *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 you configure.

Note. The maximum number of special requirement groups that the system can process for a single report request is 30. In addition, for *special usage* requirement groups, the system does not reference the career, program, plan, sub-plan 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 you define to all students in your batch. If the number of active academic requirement groups with the special usage exceeds 30, the process will fail.

Here's how to set up special usage values:

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

See Also

Chapter 2, “Setting Up Optional Advisement Data,” Setting Up Special Requirement Usage Values, page 14

Chapter 5, “Setting Up Academic Requirement Groups,” Setting Up Requirement Groups, page 86

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Transcripts,” Defining Transcript Type Basic Data

PeopleSoft 8 SP1 Student Records PeopleBook, “Producing Transcripts,” Understanding Individual Transcript Requests

PeopleSoft 8 SP1 Student Records PeopleBook, “Producing Transcripts,” Creating Batch Transcript Requests

Pages Used to Set Up Special Requirement Usage Values

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

Entering Requirement Usage Values

Access the Requirement Usage page.

Requirement Usage

View All 1 of 1

Requirement Usage: PHBK

*Effective Date: 01/01/1901

*Status: Active

*Description: Phi Beta Kappa

*Short Description: Phi Beta K

*Long Description: Certify students for honors recognition.

Special Report Format

Requirement Usage page

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

Effective Date

Enter an effective date for this requirement usage. The effective date defines when the Status that you select is valid. (A new effective-dated row should

be added if any of the requirement usage information changes.) 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 a status for this requirement usage. Select *Active* when adding a new requirement usage. The *Inactive* option should only be used if your institution will no longer be using this requirement usage. (A new effective-dated row should be added if any of the requirement group information changes.) Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Description, Short Description, and Long Description

Enter a description, short description, and long description for the requirement usage that you are establishing. The Description is used as a search key and also appears in prompts for requirement usage values. Type a description that actually describes the requirement usage, so 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 is printed on the advising report. Use this field to describe the requirement usage in some detail.

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

CHAPTER 3

Setting Up Academic Course Lists

This chapter discusses how to set up academic course lists.

Setting Up an Academic Course List

Here's how to create an academic course list:

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

Pages Used to Create an Academic Course List

Page Name	Object Name	Navigation	Usage
Course List Description	RQ_COURSE_LIST	Manage Student Records, Define Academic Requirements, Setup, Academic Course Lists, Course List Description	Describe the course list.
Course List Detail	RQ_CRSE_LIST_DET	<ul style="list-style-type: none">• Manage Student Records, Define Academic Requirements, Setup, Academic Course Lists, Course List Detail• Manage Student Records, Establish Courses, Setup, Enrollment Course Lists, Course List Detail	Establish exactly which courses comprise the course list.
Course List Parameters	RQ_CRSE_LST_DPRM	Manage Student Records, Define Academic Requirements, Setup, Academic Course Lists, Course List Parameters	Establish detail parameters for each course contained in the course list.

Setting Up a Course List Description

Access the Course List Description page.

Course List Description page

Effective Date and Status

The effective date defines when the status that you select is valid. The 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 a requirement group is defined to the plan level, then the student's plan requirement term is used to determine the effective date for the requirement group. (Student requirement terms are defined in the Student Program/Plan component.) This requirement term is then used to evaluate the current effective-dated row for all requirements and course lists that get used by the requirement group.

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

Copy

In *Add* mode only, the Copy button appears. You can copy course lists with a usage of *Academic Advisement* and *Requisite Restriction* (although requisite restrictions will not appear if you search for course lists to copy –

you must enter the requisite course list number directly during the copy process). Course lists with a Usage of *Student Individualized Plan* cannot be copied. Click the Copy button and enter the course list number that you want to copy, and select the appropriate copy mode. (The default value is *Copy last record*.) Choices include *Copy last record*, *None*, and *Copy all records*. *Copy last record* indicates that only the last effective-dated record is copied. *None* converts to *Copy last record*. *Copy all records* indicates that all effective-dated records are copied. (This field value should be used only when the course list to be copied has multiple effective-dated rows.) Then click OK and the specified course list is copied.

Because the academic course list pages are more complex than their enrollment course list counterparts, copying enrollment course lists and requisite/restriction course lists into course lists with a usage of *Academic Advisement* is not possible. Course lists with a usage 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, you are not able to assign a specific course list number to the new list. When you save after you click 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 use the Copy button. Instead, create the new course list by retyping all the field values.

Usage

Specifies how data in this course list is used. There are two possible usage values for the course list: *Academic Advisement* and *Student Individualized Plan*. (The default value is *Academic Advisement*.) If *Academic Advisement* is used, the data recorded on this page is used during the degree audit process. If *Student Individualized Plan* is used, the data contained on the Student Override Exceptions pages is used for degree audit purposes. The *Student Individualized Plan* value is needed when a specific student or group has special requirements. If a course list has a Usage of *Student Individualized Plan*, the course list can only be used by a requirement with a Usage 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

You can use the academic structure reflected in the Academic Institution, Academic Career, Academic Program, Academic Plan, and Academic Sub-Plan fields to document departmental ownership of the course list. These fields are used for prompting and documentation, and have no impact on auditing analysis.

Creating a Course List Detail

Access the Course List Detail page.

Course List Detail page

A course is specified either by a unique course ID or by using the wildcard indicator. For example, you can insert a row with the course ENGL 62 or set up a wild card course list of all ENGL (courses rather than manually enter each English course row by row.) For example, to set up a list of all courses in a particular subject, select the WildCard Indicator check box and enter a subject of *ENGL* in the Subject field and *###* in the Catalog Nbr field. This value automatically includes all ENGL courses with three numeric values or less. To limit the wildcard list to all two-digit ENGL courses beginning with the number 6, enter a course value of *ENGL* in the Subject field and *6#* in the Catalog Nbr field. (In this example, the number of # signs needed to indicate all courses in a particular subject area varies by institution.)

Fetch

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

Course Sequence

A sequentially assigned number. This number acts as a course specification, indicating either a specific course ID or a group of equivalent courses. Each course sequence number indicates a unique component of the course list and can be arbitrarily assigned except when you plan to assign the course list to a requirement line type of *Sequential Restriction* or *Global Sequential Restriction* on the Line Item page. If sequence order is important and the requirement line type to which this course list is attached is *Sequential Restriction*, enter the correct course order here so that the advising process requires the student to complete the courses in the course sequence you specify. For example, FRENCH 1, FRENCH 2, and FRENCH 3 should be taken in this order. Sequentially order these courses using this page.

If the WildCard Indicator check box is not selected, the Course ID field is used to specify the course and the following fields are available:

Course ID

Enter the Course ID that specifies the course needed to satisfy this course list. (Prompt on this field so that search criteria can be entered to narrow down the selection choices.) If a course ID contains multiple offerings, 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, the audit allows both classes to count towards unit and GPA requirements. The classes are treated as separate courses.

Include Equivalent Courses	<p>Select in order for the system to include in its evaluation both the course ID 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, the following fields become unavailable: Term, Associated Class, and Topic ID.</p> <p><i>Clear</i> this check box in order to further narrow your course parameters with the Term, Associated Class, and Topic ID fields. For example, you may specify not only the course ID, but also the term in which the specific course must be taken.</p> <p>See <i>PeopleSoft 8 SP1 Student Records PeopleBook</i>, “Setting Up the Course Catalog,” Creating Course Equivalency Groups.</p>
Term	<p>Enter the term in which the student must take the course you specify in order for the course to be used in this course list. Leave this field blank to return all values.</p>
Associated Class	<p>Enter the associated class number (of the course you specify) that the student must take in order for the course to be used in this course list. For class associations, indicate a term to prompt off valid values. Leave this field blank to return all values.</p> <hr/> <p>Note. You can not enter 9999, as this special associated class number can be associated with any other associated class number and is never an enrollment section.</p> <hr/> <p>See <i>PeopleSoft 8 SP1 Student Records PeopleBook</i>, “Managing the Schedule of Classes,” Defining Class Associations.</p>
Topic ID	<p>Enter the topic ID (of the course you specify) that the student must take in order for the course to be used in this course list. This field prompts from the topics defined in the course catalog. Leave this field blank to return all values.</p> <p>See <i>PeopleSoft 8 SP1 Student Records PeopleBook</i>, “Setting Up the Course Catalog,” Defining Course Catalog Data.</p>
WildCard Indicator	<p>Select to specify the course is a wild card course, and use additional variables to specify the course you want to capture. The following fields are available.</p>
Academic Group	<p>Enter the academic group from the course catalog offering. (Leave this field blank if any academic group is acceptable.)</p>
Academic Institution	<p>The institution recording the data.</p>
Subject	<p>Enter the subject of the course offering. (Leave this field blank if any subject is acceptable.)</p>
Catalog Nbr (catalog number)	<p>Enter the required portion of the catalog number that is a ten-character field in 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 Nbr of 3## indicates that any 300-level course is acceptable, including 301A, because suffixes are ignored when a number wild card is specified unless a suffix value is exclusively indicated. In another example, a Catalog Nbr field value of 3##B would only accept 300-level courses with a suffix of B. In a third</p>

example, a Catalog Nbr field value of 321* indicates that 321, 321A, and 321B (but not 321AB) are acceptable. You can wild card any position in the field. When using wild cards, equivalent courses are not checked. (This is an efficiency constraint that has been applied.)

Note. Ranges are not supported in the Catalog Nbr field. However, multiple detail lines can be established. For example, in one detail line, you can wild card all 100-level courses. In a second detail line, you can wild card 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 the # sign, the system right-justifies the value. If you enter the * sign, the system left-justifies the value. For example, 1#* retrieves 10 through 19 plus one alphanumeric character (that can be blank).

The following table provides an overview of how the system processes different wild card values.

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

Warning! Alpha characters can not be placed before numeric characters. The format must be NNNNAAAAAA (N means numeric, A means alphanumeric). Specifically, four numeric characters must precede all alpha characters.

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

Establishing Course List Parameters

Access the Course List Parameters page.

Course List Parameters page

Course Sequence

Appears by default from the Course List Detail page.

Course Information

Identifies a course listed on the Course List Detail page. Course information is presented in course sequence order. This field is blank when the WildCard Indicator check box is selected. (The remaining fields on this page contain detailed information about the course.)

Minimum Units / Crs (minimum units/course)

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

Minimum GP / Unit (minimum grade points/unit)

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

Transfer Level Allowed

Indicates what type of transfer credit (if any) is acceptable. Choices include the following:

Always Allow (Default): Indicates that all applicable transfer credit can be used to satisfy the requirement.

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

Never Allow: Indicates that transfer credit can never satisfy the requirement.

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

None: Converts to *Always Allow*.

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

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

See *PeopleSoft 8 SPI Recruiting and Admissions PeopleBook*, “Setting Up Prospects,” Setting Up School Types.

See *PeopleSoft 8 SPI Student Records PeopleBook*, “Setting Up Transfer Credit Processing,” Defining External Organizations.

Course Sequence

Appears by default from the Course List Detail page.

Course Information

Identifies a course listed on the Course List Detail page. Course information is presented in course sequence order. This field is blank when the WildCard Indicator check box is selected. (The remaining fields on this page contain detailed information about the course.)

Minimum Units / Crs (minimum units/course)

The minimum number of units that this course or courses in this list (if a wild-card list) must provide to be considered valid.

Minimum GP / Unit (minimum grade points/unit)

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

Transfer Level Allowed

Indicates what type of transfer credit (if any) is acceptable. Choices include the following:

Always Allow (Default): Indicates that all applicable transfer credit can be used to satisfy the requirement.

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

Never Allow: Indicates that transfer credit can never satisfy the requirement.

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

None: Converts to *Always Allow*.

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

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

See *PeopleSoft 8 SPI Recruiting and Admissions PeopleBook*, “Setting Up Prospects,” Setting Up School Types.

See *PeopleSoft 8 SPI Student Records PeopleBook*, “Setting Up Transfer Credit Processing,” Defining External Organizations.

Requirement Designation

Select any requirement designation that is a special requirement within this course sequence number. Typically, this designation is attached to a course and affects one section of that course. (A requirement designation may reflect additional work that a student needs to complete in addition to the regular course work or the designation may be an identifier used to track what sort of requirement this course fulfills. For example, the requirement designation might indicate that the course fulfills the physical education requirement or the architecture design credit.) Depending on the setup data in the Requirement Designation table, a separate course grade may or may not be required for designation credit to be earned. If a separate requirement designation grade is required, then a RD Grade of *Satisfied* must be entered on the Grade Roster 2 page or the Student Enrollment 4 page for degree audit to include the course. If a separate requirement designation grade is not required, then a passing grade in the course must be earned for designation credit to be granted. (The user defines the minimum grade needed for this default to take place.) If a requirement designation is required, then a 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, the degree audit records the requirement designation as satisfied.

See *PeopleSoft 8 SPI Student Records PeopleBook*, “Preparing for the Course Catalog and Schedule of Classes,” Creating Requirement Designations.

Valid Begin and Valid End

Enter the date range that indicates when this course must be taken to satisfy the requisite. Leaving these fields blank indicates that when the course is/was taken does not matter. Note that in comparing the date range, the start date of the term in which the course is/was taken is used.

Course Must Be GPA Material

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

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

See *PeopleSoft 8 SPI Student Records PeopleBook*, “Setting Up Grading,” Defining Grading Schemes.

Test Credit is Allowed	Select if the course taken to satisfy this requirement can be taken via the test credit portion of the student's academic record. (The default is on.)
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 on.)
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, a nongraded course, a course with a grade of incomplete, or a course in progress will be included in the academic analysis and will satisfy all parameters. (The default is off.)

Example

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

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

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

Then create an academic requirement that references the course list. On the Parameters page, enter a Minimum Units field value of 6 and a Minimum Courses field value of 2. On the Line Item page, enter a Line Type of *Course Requirement*. On the Line Item Detail page, enter a Line Detail Type of *CLST* and enter the course list.

Now create an academic requirement group that references the academic requirement above or attach the academic requirement to some pre-existing academic requirement group. On the Requirement Group Detail page, enter a Group Line Type of *Requirement* and reference the academic requirement.

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

CHAPTER 4

Setting Up Academic Requirements

This chapter discusses prerequisites, common elements, and academic requirement setup.

Setting Up Academic Requirements

Here's how to create an academic requirement:

1. On the Requirement page, enter the institution, career, program, plan, and sub-plan information for the new requirement.
2. (Optional) On the Parameters page, establish the parameters or filters for this requirement, as well as what type of requirement information is printed on the degree audit report.
3. On the Line Item page, enter the requirement detail.
4. On the Line Item Parameters page, indicate the line item parameters for the academic requirement, as well as any additional controls on the requirement line items.
5. (Optional) On the Line Item Detail page, set up additional parameters based on course lists or conditions.

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

Prerequisites

Set up course lists before establishing academic requirements, because academic requirements typically reference course lists.

See Also

Chapter 3, "Setting Up Academic Course Lists," page 19

Common Elements Used in This Chapter

Course Ranking Scheme

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

Chronological: Courses are ranked by term (first term to current term).

Course Catalog: Courses are ranked by catalog number (lowest to highest).

Grade Points: Courses are ranked by grade point (highest to lowest). For example, to create a requirement that requires the student to complete at least five courses in that student's major with a grade of *A*, select *Grade Points*.

Reverse Chronological: Courses are ranked by term in reverse order (current term to first term).

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

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

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

The description is used as a search key and appears in search results for requirements. Enter a description that is meaningful as a search key. For example, *1999 req for PSYCH* (psychology) helps identify this requirement.

The short description appears only on this page.

The long description can be printed on the advising report. Use this field to describe the requirement in some detail. (For example, on the Parameters page, the Print Control field value controls whether the long description and required parameters are printed on the advising report.)

Minimum Units

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

Pages Used to Set Up Academic Requirements

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

Defining Academic Requirements

Access the Requirement page.

Requirement Parameters Line Item Line Item Parameters Line Item Detail

View All 1 of 1

Academic Requirement: 000001101

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

***Description:** Final Residency

***Short Description:** Final Resi ***Usage:** Academic Advisement

***Long Description:** At least 8 of a student's final 16 units must be taken in residence.

***Academic Institution:** PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Academic Program:

Academic Plan:

Academic Sub-Plan:

Pre-Condition: Academic Level Equal 40 Senior

Requirement page

Academic Requirement

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

Copy

In *Add* mode (only), this button appears on this page. Requirements that are eligible to be copied are academic requirements with a value of *Academic Advisement* and enrollment requirements with a value of *Requisite Restriction*. To copy an eligible requirement, click the Copy button, and enter the requirement to copy. Then enter the appropriate Copy Mode field value. (The default value is *Copy last record*.)

Your choices are:

Copy last record: Indicates that only the last effective-dated record is copied.

None: Converts to *Copy last record*.

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

Then click OK to copy the specified requirement.

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

Note. If you use the copy feature to create a new requirement, you cannot assign an academic requirement number to the new requirement. When you save after you click 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 reentering all the field values.

Effective Date

Enter an effective date for this requirement. This date 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 a requirement group is defined to the plan level, then the student's plan requirement term is used to determine the effective date for the requirement group. (You define student requirement terms in the Student Program/Plan component.) This requirement term is then used to evaluate the current effective-dated row for all requirements and course lists that get used by the requirement group.

Status

Select a status for this academic requirement. Values are:

Active: Select when adding a new academic requirement.

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

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

Usage

Select the value that indicates how this requirement is applied. (The field is unavailable for entry unless you are in Add mode.) Values are:

Academic Advisement: The data recorded on this page is used to define standard academic requirements or is used on the Requisite Detail page in the PeopleSoft Student Records application.

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

Requirement Course Share Restriction: Course sharing is restricted during the degree audit process based on data in the COURSE_SHARE_SET table. 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. Requirement course share restriction usage has a reduced set of parameters because there is only one line type: *Unit, Course, or GPA Limit* (grade point average limit).

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

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

Pre-Condition

Select a precondition to restrict application of the requirement to students who match that precondition. For example, if a requirement has a precondition of *Student Group Equal Athlete*, then this requirement applies only to students who have the student group *Athlete*. If this precondition is false for a student, then the system does not apply the requirement to the student but skips it during analysis. If this field contains a value other than *None*, additional fields are available to complete the statement. Possible operators for a statement include *None*, *< or =*, *> or =*, *Equal*, *Greater*, *In*, *Less*, *Not Equal*, and *Not In*. *None* converts to *Equal*. Operators are not used if the is *Table Entry*. If the is *Table Entry*, select a dynamic condition from the Define Dynamic Condition component.

Important! A student with a null set of entities is 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 entity group complements.

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 (the default): No precondition.

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

Academic Level: Compared to the student's academic level as of the advising process as of date.

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

Academic Plans: All of the student's plans are part of the equation. All of the students plans must be *In* or *Not In* the entity group that you specify.

Academic Program: One of the student's programs is part of the equation. *Academic Program* and *Primary Academic Program* reference the same program when the student has only one program.

Academic Programs: All of a student's academic programs are evaluated.

Academic Standing: Indicates 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. This value is evaluated against the student based on the as of date of the advising process.

Academic Sub-Plan: One of the student's sub-plans is part of the evaluation.

Academic Sub-Plans: All of a student's sub-plans are part of the evaluation.

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

Primary Academic Plan: The student's primary academic plan, the plan that 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: A student's primary academic program, the program that 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: A group of students. Values might include *athlete* and *veteran*. Values are defined in the Student Group table.

Student Groups: All student groups containing a student are part of the equation.

Table Entry: A dynamic condition that has been created in the Define Dynamic Condition component.

Note. Operators are not used if the precondition is *Table Entry*. If the precondition is *Table Entry*, select a dynamic condition from the Define Dynamic Condition component.

Important Information About the Primary Academic Plan and Primary Academic Program

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

See Also

[Chapter 9, “Creating and Using Expanded Conditions and Custom Conditions,” Defining Expanded Conditions, page 133](#)

PeopleSoft 8 SPI Student Records PeopleBook, “Managing Students’ Programs, Plans, and Subplans,” Maintaining Students’ Program Stacks

Establishing Requirement Parameters

Access the Parameters page.

The screenshot shows the 'Parameters' page for a requirement. The top navigation bar includes tabs for 'Requirement', 'Parameters', 'Line Item', 'Line Item Parameters', and 'Line Item Detail'. The 'Parameters' tab is selected. The page displays various fields for configuring a requirement parameter. Key fields include 'Academic Requirement' (000001101), 'Description' (Final Residency), 'Effective Date' (02/02/1900), and 'Status' (Active). There are input fields for 'Minimum GPA', 'Minimum Units', and 'Minimum Courses'. A 'Default for Detail Level' box contains a 'Minimum GP / Unit' field. Dropdown menus are provided for 'Course Ranking Scheme' (set to Chronological), 'Reporting' (set to Always Report), 'Credit Include Mode' (set to All Stats), and 'Choice Resolution Method' (set to Satisfy in Sequential Order). A 'Connector Type' section has radio buttons for 'AND' and 'OR', with 'OR' selected. There are checkboxes for 'Partition Sharing' and input fields for 'Min Partitions to Complete' (set to 1) and 'Max Partitions to Allow Credit'. A 'Print Control' dropdown is set to 'Skip printing of this level'.

Parameters page

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

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

For example, if the requirement indicates that the minimum number of units is 24, and the requirement group indicates that the minimum is 18, 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, 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 Credit Include Mode is set to *All Stats* (all course statistics) at the requirement (or requirement group) level, the advisement engine first uses as many units or courses as needed to satisfy the lowest parameter level. For example, if a single requirement line needs one course, and a requirement group points to that requirement (which requires two courses), then set the minimum course parameter to *1* at the requirement line level and set it to *2* at the requirement group parameters level.

Minimum GPA

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 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 Units

The minimum total units for the courses selected to satisfy this requirement.

Default for Detail Level

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

Minimum GP / Unit (minimum grade points/unit)

The minimum grade points per unit for each class selected to satisfy this requirement.

Minimum Courses

The minimum number of courses required for this requirement. In order to include courses worth 0 units and 1 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, courses (such as remedial courses) that are worth 0 units are not picked up in the audit.

Course Ranking Scheme

How the system ranks courses to fulfill the requirement. If a student has taken more courses than needed to meet the requirement and no other information is available, the value in this field determines the order in which courses are to satisfy the requirement. (Courses are sorted in this order for this requirement only.) This field sorts based on the field value but reports on the advising report in chronological order based on term. Select a course ranking scheme:

Chronological: Courses are ranked by term (first term to current term).

Course Catalog: Courses are ranked by catalog number (lowest to highest).

Grade Points: Courses are ranked by grade point (highest to lowest). For example, to create a requirement that requires the student to complete at least 3 courses in their major with a grade of *A*. To do this, select *Grade Points*.

Reverse Chronological: Courses are ranked by term in reverse order (current term to first term).

Reverse Course Catalog: Courses are ranked by catalog number in reverse order (highest to lowest). For example, you might want to create a requirement that uses 400–level courses before 100–level courses.

Reporting

Select a value to determine the conditions under which the requirement is reported on the advising report. Values are:

Always Report: Requirement always reports, regardless of the completion status.

Note. Except for *Always Report*, every reporting value acts as a post-condition.

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

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

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

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

Credit Include Mode

Select a mode to determine how courses in the requirement are included in the degree audit. Values are:

All Stats: All course statistics are reported. 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): Courses in this requirement are excluded from the GPA of the overall requirement group GPA containing this requirement. Like *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: The system verifies that the course was taken, but credit is not recorded 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 towards requirement completion. For example, for an undergraduate diversity requirement,

verify that all undergraduate students 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 field value is *Verify*, the parameters (Minimum Units and Maximum Units Allowed field 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 less than 6 or more than 15 units, then the truth value is false. If the student is within this range, then the truth value is true. *Verify* accepts and reports all courses that match the course list, whereas *All Stats* and *Excl GPA* lines use the minimum or maximum values to exclude courses from use for the requirement (so they can be used elsewhere in the audit).

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

Choice Resolution Method

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

None: Converts to Satisfy in Sequential Order.

Satisfy in Sequential Order: Detail lines are evaluated in sequential order except for limits that are analyzed first. If the requirement consists of Line 10 OR Line 20 OR Line 30 OR Line 40, where partition sharing is *not* enabled and the minimum partitions to complete is 2, any partitions must be satisfied, even though Line 10 and Line 20 are analyzed first. In another example, if a requirement consists of Line 10 OR Line 20, a course that can satisfy both Line 10 and Line 20 will be 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: After limits are analyzed, detail lines are sorted to find the best combination with regard to the requirement. If the requirement consists of 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 2, then courses that satisfy multiple partitions can be used in any two of the lines.

Connector Type

Select the main connector type for this requirement. The connector type indicates 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 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 joining 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. This field is used as the connector default on the Line Item page when rows are inserted.

If the connector type is OR, then the fields described below are available for entry.

Important! Regardless of which Choice Resolution Method field value you select, if the student does not meet the requirements of any of the lines, 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, 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)

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

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

The maximum number of partitions that can be credited towards meeting a requirement. For example, this feature might be used in a distribution requirement where a student must meet five of seven requirement partitions, but cannot get credit for more than five partitions.

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 is *Verify*, you do not need to activate partition sharing. However, if a History course satisfies both the General Education requirement and the Writing requirement, 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). 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, the statement is satisfied.

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 requirement line level.

Print on Audit Reports : Requirement information (the long description and the required parameters) is always printed on the report.

Do Not Print: Requirement information (as well as the line item parameter information) is never printed on the report.

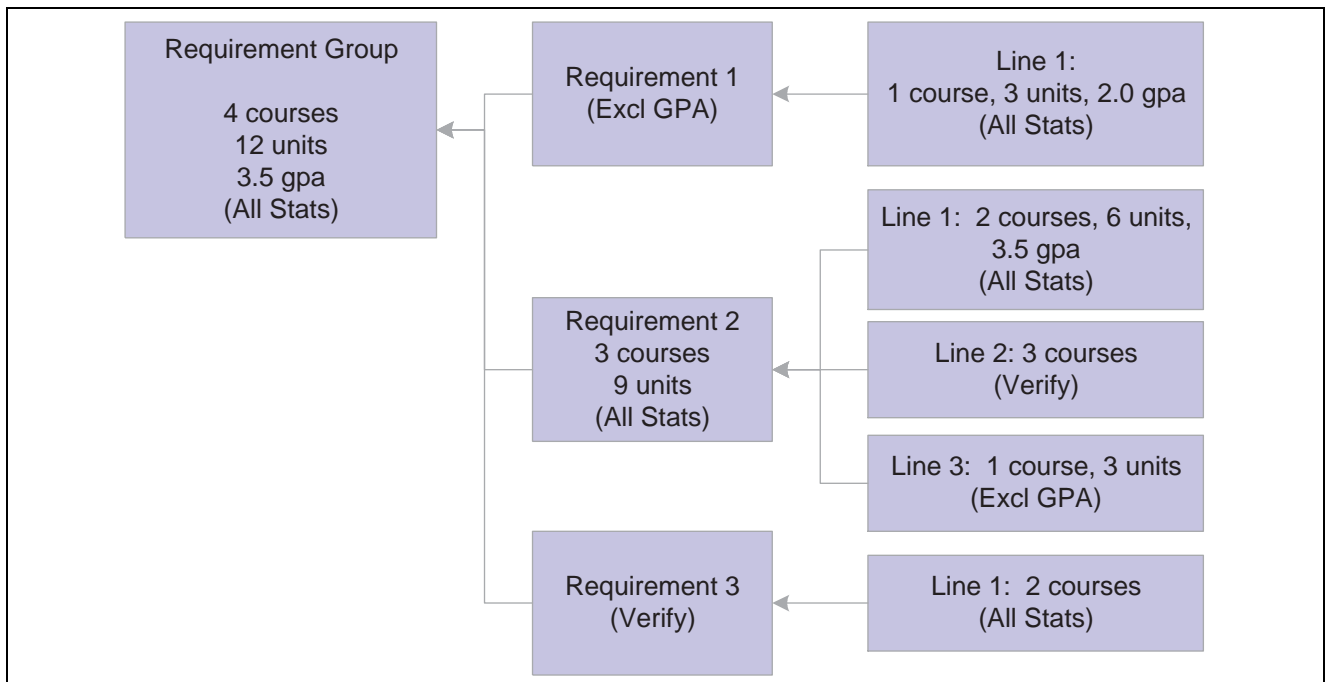
Print If There is Line Detail: If line detail is used to satisfy this requirement, the information is printed on the report in addition to the requirement information.

Skip Printing of This Level: Requirement lines (but not a description of the requirement itself) are printed on the report. This value is not used in analysis; it affects the printout format only.

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

Example of Credit Include Mode

In the following example, the requirement group at the top of the diagram requires a total of 4 courses for 12 units with a combined minimum GPA of 3.5. The three detail lines (requirements) contribute to these parameters according to the Credit Include Mode value that is assigned at each level.



Credit Include Mode diagram

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

Requirement 2 requires a minimum of 3 courses for a total of 9 units. Line 1 requires 2 courses with a minimum of 6 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. Since this is the only line contributing 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 3 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 3 courses or 9 units at the requirement level. This line only helps to satisfy the overall requirement by passing a true (if the 3 courses are found) or false. Line 3 requires 1 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 course count and units are passed to the requirement level.

Requirement 3 has one detail line that requires 2 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.

Example of Choice Resolution Method

When the choice resolution method is *Satisfy in Sequential Order* and a requirement consists of Line 10 *OR* Line 20, the system will use 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 will be used in Line 10, not Line 20. (Note that 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.

Requirement	Satisfy in Sequential Order	Investigate All Combinations
Requirement 1234 Minimum Partition = 1 OR Connector Type	RQ not satisfied	RQ satisfied
Line 0010 Minimum 2 courses CLST of Math 1 and Math 2	Math 1	
OR		
Line 0020 Minimum 2 courses CLST of Math 1 and Math 5	Math 5	Math 1 and Math 5

In another example, when lines are unioned together 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 the student completes Math 1 and Math 2 with the following setup:

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

Sorting Requirement Lines and Partitions (SRPCARN1)

When you run the advising process, the system calls a routine that calculates the priority of lines if the requirement contains partitions or is an “OR” requirement. The system processes the lines and assigns a priority to the lines in order to select the best solution. By selecting a choice resolution method of *Investigate All Combinations*, the system will use different criteria to determine which line to use first.

The main key for sorting lines is the status of the line. There are 4 possible values for this key:

- 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.

Based on this logic, the system gives priority to all satisfied lines over incomplete or unused lines. This logic applies to both *Satisfy in Sequential Order* and *Investigate All Combinations*. However, if the choice resolution method is *Investigate All Combinations*, the system calculates priority differently based on the parameters passed to the routine. The following list documents which lines the system selects when you use the *Investigate All Combinations* option.

If minimum units are required for the requirement group or requirement:

1. Line Status — Descending
2. Line Units — Descending
3. Line Courses — Descending

4. Line GPA — Descending
5. Line Qualified Units — Descending
6. Line Qualified Courses — Descending
7. Line Qualified GPA — Descending

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

1. Line Status — Descending
2. Line Courses — Descending
3. Line Units — Descending
4. Line GPA — Descending
5. Line Qualified Courses — Descending
6. Line Qualified Units — Descending
7. Line Qualified GPA — Descending

If no minimum units or courses are required and 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

Sorting Courses (SRPCARN2)

Some course characteristics may alter sort order. The first characteristic that alters sort order is the course status. The possible status values are as follows:

- The course is a substituted course.
- The course is a soft-substituted course.
- The course hasn't been substituted or excluded.
- The course is soft-excluded or excluded.

This high level sort order ensures that courses that are substituted or soft substituted are given priority over regular courses, and 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 being passed into the sort routine, courses will be sorted in the following order:

Chronological Sort

1. Status of the course — Ascending
2. Term — Ascending
3. Course units — Descending
4. Course ranking — Ascending

Reverse Chronological Sort

1. Status of the course — Ascending
2. Term — Descending
3. Course units — Descending
4. Course ranking — Ascending

Grade Points Sort

1. Status of the course — Ascending
2. Grade points for the course — Descending
3. Course units — Descending
4. Course ranking — Ascending

Catalog Number Sort

1. Status of the course — Ascending
2. Catalog number — Ascending
3. Course units — Descending
4. Course ranking — Ascending

Reverse Catalog Number Sort

1. Status of the course — Ascending
2. Catalog number — Descending
3. Course units — Descending
4. Course ranking — Ascending

Combinations of Print Control and Credit Include Mode Field Values

The following table contains almost all possible combinations of the Print Control and Credit Include Mode field values. The Print Control field is contained on the Parameters page as well as the Line Item Parameters page. The Credit Include Mode field is contained on the Requirement Group Parameters page, the Parameters page, and the Line Item Parameters page. Depending on the field values for Print Control and Credit Include Mode, the requirement group long description, requirement long description, requirement line long description, courses, and/or conditions are printed on the audit report.

Note. Often, there is more than one combination that results in the same information printing 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

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:

- An *X* indicates that the item appears on the advisement report.
- The *Exclude GPA* value is excluded from 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 was not considered in the design of this grid.
- Due to the number of entries, the table has been divided into smaller sections.

Print Control and Credit Include Mode Values

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	X	AS	DNP		AS	DNP		
AS	X	AS	DNP		AS	DNPLD		
AS	X	AS	DNP		AS	PITILD		
AS	X	AS	DNP		AS	SPOTL		
AS	X	AS	DNP		AS	POAR		

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	X	AS	PITILD	X	AS	DNP		
AS	X	AS	PITILD	X	AS	DNPLD	X	
AS	X	AS	PITILD	X	AS	PITILD	X	X
AS	X	AS	PITILD	X	AS	SPOTL		X
AS	X	AS	PITILD	X	AS	POAR	X	X
AS	X	AS	SPOTL		AS	DNP		
AS	X	AS	SPOTL		AS	DNPLD	X	
AS	X	AS	SPOTL		AS	PITILD	X	X
AS	X	AS	SPOTL		AS	SPOTL		X
AS	X	AS	SPOTL		AS	POAR	X	X
AS	X	AS	POAR	X	AS	DNP		
AS	X	AS	POAR	X	AS	DNPLD	X	
AS	X	AS	POAR	X	AS	PITILD	X	X
AS	X	AS	POAR	X	AS	SPOTL		X

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	X	AS	POAR	X	AS	POAR	X	X
AS	X	VER	DNP		VER	DNP		
AS	X	VER	DNP		VER	DNPLD		
AS	X	VER	DNP		VER	PITILD		
AS	X	VER	DNP		VER	SPOTL		
AS	X	VER	DNP		VER	POAR		
AS	X	VER	PITILD		VER	DNP		
AS	X	VER	PITILD		VER	DNPLD		
AS	X	VER	PITILD		VER	PITILD		
AS	X	VER	PITILD		VER	SPOTL		
AS	X	VER	PITILD		VER	POAR		
AS	X	VER	SPOTL		VER	DNP		
AS	X	VER	SPOTL		VER	DNPLD		
AS	X	VER	SPOTL		VER	PITILD		
AS	X	VER	SPOTL		VER	SPOTL		
AS	X	VER	SPOTL		VER	POAR		
AS	X	VER	POAR	X	VER	DNP		

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	X	VER	POAR	X	VER	DNPLD		
AS	X	VER	POAR	X	VER	PITILD		

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	X	VER	POAR	X	VER	SPOTL		
AS	X	VER	POAR	X	VER	POAR		
AS	X	AS	DNP		VER	DNP		
AS	X	AS	DNP		VER	DNPLD		
AS	X	AS	DNP		VER	PITILD		
AS	X	AS	DNP		VER	SPOTL		
AS	X	AS	DNP		VER	POAR		
AS	X	AS	PITILD	X	VER	DNP		
AS	X	AS	PITILD	X	VER	DNPLD	X	
AS	X	AS	PITILD	X	VER	PITILD	X	X
AS	X	AS	PITILD	X	VER	SPOTL		X
AS	X	AS	PITILD	X	VER	POAR	X	X
AS	X	AS	SPOTL		VER	DNP		

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	X	AS	SPOTL		VER	DNPLD	X	
AS	X	AS	SPOTL		VER	PITILD	X	X
AS	X	AS	SPOTL		VER	SPOTL		X
AS	X	AS	SPOTL		VER	POAR	X	X
AS	X	AS	POAR	X	VER	DNP		
AS	X	AS	POAR	X	VER	DNPLD	X	

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	X	AS	POAR	X	VER	PITILD	X	X
AS	X	AS	POAR	X	VER	SPOTL		X
AS	X	AS	POAR	X	VER	POAR	X	X
AS	X	VER	DNP		AS	DNP		
AS	X	VER	DNP		AS	DNPLD		
AS	X	VER	DNP		AS	PITILD		
AS	X	VER	DNP		AS	SPOTL		
AS	X	VER	DNP		AS	POAR		
AS	X	VER	PITILD		AS	DNP		

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	X	VER	PITILD		AS	DNPLD		
AS	X	VER	PITILD		AS	PITILD		
AS	X	VER	PITILD		AS	SPOTL		
AS	X	VER	PITILD		AS	POAR		
AS	X	VER	SPOTL		AS	DNP		
AS	X	VER	SPOTL		AS	DNPLD		
AS	X	VER	SPOTL		AS	PITILD		
AS	X	VER	SPOTL		AS	SPOTL		
AS	X	VER	SPOTL		AS	POAR		
AS	X	VER	POAR	X	AS	DNP		

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	X	VER	POAR	X	AS	DNPLD		
AS	X	VER	POAR	X	AS	PITILD		
AS	X	VER	POAR	X	AS	SPOTL		
AS	X	VER	POAR	X	AS	POAR		
VER	X	ANY	ANY		ANY	ANY		

Creating a Requirement Line Item

Access the Line Item page.

The screenshot displays the 'Line Item' page within a software application. At the top, there are navigation tabs: 'Requirement', 'Parameters', 'Line Item' (which is selected), 'Line Item Parameters', and 'Line Item Detail'. Below the tabs, there's a header bar with 'View All' and '1 of 1' indicators. The main content area is divided into two sections. The top section displays 'Academic Requirement: 000001089', 'Description: Psych Stats Requirement', 'Effective Date: 02/02/1900', and 'Status: Active'. The bottom section, titled 'Line Item', contains a 'Refresh Parentheses' button, a 'Line:' field with the value '0010', and a '+ -' button. Below these are several fields: '*Line Type:' set to 'Course Requirement', 'Institution:' set to 'PSUNV', '*Description:' set to 'Psych Stats', '*Short Description:' set to 'Psych Stat', '*Long Description:' with the text 'Successfully complete one approved statistics course:', and 'Pre-Condition:' set to 'None'.

Line Item page

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

A Line Type of *Global Limit*; *Global Sequential Restriction*; *Sequential Restriction*; or *Unit*, *Course*, or *GPA Limit* is enforced only on academic requirements with a Credit Include Mode field 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 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 of *Used by Requirement* (so long as the requirement contains the global limit or restriction.) The List Recall Mode of *Used by Requirement* points to a course list that contains all courses that exceed the limit or violate the restriction, thus enabling these courses to be subtracted from a requirement with a Credit Include Mode of *Verify*. A requirement line with a Credit Include Mode of *Verify* cannot implement a local restriction because the line can specify a local check instead.

Refresh Parentheses

Click to refresh and display the parentheses after you add new detail lines. If new lines and connectors are added, the existing display may not show the parentheses in the correct position. The display of parentheses is updated when the page is saved or when you click this button. Parentheses cannot be explicitly set 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 A OR B AND C OR D is entered, 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 A OR B AND C OR D is entered, 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 that indicates how this detail line is connected with the prior detail line. If *NONE* is selected, the field value populates the Connector Type field on the Parameters page.

Line

A sequential line number that is assigned by the system but can be overridden by the user. (Computer-generated line numbers are assigned in increments of 10.) It determines the order in which the detail lines are evaluated. When adding a new line, replace the field value *NEW* with the next sequential line number.

Line Type

Select the line type that indicates the line type of the requirement. Values are:

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 stated on the Line Item Detail page are true, false is recorded. If the check box is selected, and any conditions stated on the Line Item Detail page are false, true is recorded. If the check box is clear, and the conditions stated on the Line Item Detail page are true, true is recorded.
- If the check box is not selected, and any conditions stated on the Line Item Detail page are false, false is recorded.) For example, if the condition requirement is a cumulative GPA of less than 3.5, and the student has a GPA of 4.0, the condition is met, and true is recorded.
- If the check box is selected, then false is recorded because the student does not meet the condition (which now requires a cumulative GPA of more than 3.5).

Course Requirement: Enables you to specify a course list (static or derived) from which the student must take individual courses. The number of course units and courses can be indicated on the Line Item Parameters page.

Global Limit: Is activated when it is encountered by the audit and affects all requirement groups using a credit include mode 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, 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, it applies only to the plan requirement groups that are evaluated after this plan and any sub-plan requirement groups. The limits usually affect courses taken from a specific course list, units, or GPA in course requirement lines and specific course lines. For example, this line type could be used to ensure that a student uses no more than 9 units of remedial work towards the total number of units required to graduate. In addition, this line type splits courses even when the Enable Splitting check box on the Line Item Parameters page is not selected.

Important! The global limit is applied 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: Checks 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, they are excluded from the entire audit at the academic level (for example, career, program, plan, or sub-plan), 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 will be encountered early in the audit process and applied throughout the remainder of the audit.

Sequential Restriction: Checks 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 captured by a requirement with a Credit Include Mode of All Stats. Courses captured by requirements with a Credit Include Mode of Verify are not evaluated. (Local targets are defined on the Line Item Detail page. In the absence of a local target, the default target is the current requirement.) If the courses taken do not match the specified sequence in the course list, the out-of-sequence courses are disallowed in the course requirement lines and specific course lines, but are available for use by other requirements. The sequential restriction is different from a global sequential restriction in that it applies to a specific requirement, rather than to the entire audit.

See [Appendix C, "Sequential Restriction Examples," page 219](#).

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. Local limits and restrictions are checked against targets.

Specified Courses: Enables you to specify a course list from which the student must take one of each course represented in the course list. For example, if the course list consists of English 100, History 100, and a wildcard for Math, the student must complete a minimum of one English 100, one History 100, and one Math course regardless of the minimum course or unit parameters set at the line item level. The Minimum Units and Minimum Courses fields on the Line Item Parameters page refer to the number of instances that each course in the course list must be taken. Leave the fields blank to require one for each course. Insert a value to require each course in the course list to be taken 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 must be completed for the entire requirement, including all requirement lines.

Unit, Course or GPA Limit: Checks courses used by the requirement in which it resides or other local target to enforce maximum units, courses, or GPA limits. If the unit, course, or GPA limit is exceeded, the courses are disallowed in the course requirement lines, but are available to be used 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 *Used By* derived course list field value. The requirement, requirement groups, academic programs, or academic plans that are intersected with the courses to be limited then become the target.

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

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

Pre-Condition

Select a value for the precondition filter. A precondition is used 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 is applicable only to students with a cumulative grade point average that is greater than 3.00. If this precondition is false for a student, the requirement line is not considered during analysis. Information is analyzed and reported 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).

Values are:

None (the default): No precondition.

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

Academic Level: Student's year of study. Values include freshman and sophomore. This value is evaluated against the student based on the as of date that is specified at run time.

Academic Plan: Student's academic plan (for example, major or minor) within the academic program. *Academic Plan* and *Primary Academic Plan* reference the exact same plan when the student has only one plan.

Academic Plans: All of a student's plans are part of the equation.

Academic Program: Student's academic program primary or otherwise) as defined on the Student Program page. *Academic Program* and *Primary Academic Program* reference the exact same program when the student has only one program.

Academic Programs: All of a student's academic programs are part of the equation.

Academic Standing: Student's academic standing at the institution. For example, values might include good standing, probation, and dismissal. Valid values are defined on the Academic Standing table. This value is evaluated against the student based on whatever As of Date is specified at run time.

Academic Sub-Plan: Student's sub-plan.

Academic Sub-Plans: 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).

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

Important! The primary academic plan is the plan designated by the lowest plan sequence number on the Student Plan page, and primary academic program is the program 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 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: 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: Student's student group is evaluated. (For example, values might include *Athlete* or *Veteran*.) Valid values are user-defined on the Student Group table.

Student Groups: All of the student's student groups are part of the equation.

Table Entry: A dynamic condition that has been previously created in the Define Dynamic Condition component is compared against the student (for example, Student Group = Athlete AND Academic Level = First Year).

Note. Operators are not used if the precondition is *Table Entry*. If the precondition is *Table Entry*, then select one of the dynamic conditions that has been previously created in the Define Dynamic Condition component.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort. However, you can use a condition specification as a precondition on the Line Item page. The Define Dynamic Condition component is used to define new condition specifications. On the Condition page, the Description, Academic Institution, and Connector Type of the new Condition Specification are established. Once a condition specification is created, you can use it as a condition line type in a requirement; as a condition group line type in a requirement group; or as a precondition on the Requirement Group, Requirement, or Requirement Line Item page.

Specifying Requirement Line Item Parameters

Access the Line Item Parameters page.

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

View All 1 of 1

Academic Requirement: 000001089 **Description:** Psych Stats Requirement
Effective Date: 02/02/1900 **Status:** Active

Line Item Parameters View All 2 of 2

Line Nbr: NEW **Line Name:**

Minimum GPA: **Maximum Units Allowed:**
Minimum Units: **Maximum Courses Allowed:**
Minimum Courses: **Minimum GP / Unit:**

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

Background Key

Line Nbr: NEW **Line Name:**

☐ **Count Attempts** **Print Control:** Print on audit reports
☐ **Display Select Line**
☐ **Enable Splitting**

Line Item Parameters page

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

Using this page, you can:

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

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

Requirement Line Item - Line Type	Elements That Appear
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 are recorded on this page take precedence over the parameters that are recorded at the requirement level and at the requirement group level. For example, the line item parameters might 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 field value of *Verify* for Credit Include Mode. The requirement and requirement group Credit Include Mode value can be *All Stats*. Remember that the lowest level (or the line) takes precedence.

Minimum Units	The minimum total units required to satisfy this line number.
Minimum Courses	<p>The minimum number of classes that are required to satisfy this line number.</p> <p>Note regarding <i>Specified Courses</i> requirement lines: If the line type is specified course, you can leave this 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 list(s). Regardless of this field value, this line type requires a course for each course sequence found in the course list identified on the Line Item Detail page.</p>
Minimum GPA	<p>The minimum overall GPA requirement for classes 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.)</p> <p>If the requirement line is a limit, this value serves as 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,</p>

if only one music course can be used in the audit, and that course must have a grade of C or better, enter *2.000* in this field.

Maximum GPA Allowed

Enter the maximum GPA allowed for any courses allowed by this limit.

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

Maximum Units Allowed

The maximum total units allowed for this line number. If the line type is a limit, and a value is not supplied, 0 units are allowed.

Maximum Courses Allowed

The maximum total courses allowed for this line number. Following are descriptions for both limits and non-limits.

For limits:

If values are not entered in the Maximum Units Allowed and Maximum Courses Allowed fields, the default value for each field is *0*. If either field is left blank, 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 of *All Stats*. (Requirements with a Credit Include Mode of *Verify* do not enforce limits or restrictions.) In another example, if you want to limit courses in the course list to 3 units, the Maximum Units Allowed field value should be 3 and the Maximum Courses Allowed field value should be at least *1*. If a line with a Credit Include Mode of *Verify* needs a minimum of 5 units and a maximum of 100 units, then if 101 units are picked up in the audit, the line is not satisfied just as if only 4 units were picked up.

Another example: To limit courses in the course list to 3 units, the Maximum Units Allowed field value should be 3 and the Maximum Courses Allowed field value should be at least *1*. If a line with a Credit Include Mode of *Verify* needs a minimum of 5 units and a maximum of 100 units, then if 101 units are picked up in the audit, the line is not satisfied, as though only 4 units had been picked up.

For non-limits:

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

Minimum GP/Unit (minimum grade points per unit)

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 indicated on the Basic Data page, then all in-progress work is included on the transcript.

If this field contains a value, that value is ignored if the requirement is in progress.) This field value does not override the minimum grade points per unit value that is set on the Course List Parameters page.

Reporting

The conditions under which a specific line number is reported on the advising report. Values are:

Always Report: The requirement line is always reported, regardless of the completion status.

Report Only When Not Satisfied: The requirement line is reported only when the student did not successfully complete it. (For example, this value could be used to report probationary status.)

Report Only When Satisfied: The requirement line is reported only when the student successfully completes it. (For example, this value could be used to report honors status.)

Except for *Always Report*, every reporting value acts as a post-condition. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Print Control

This field controls whether the Long Description field (from the Line Item page) and the required parameters (on this page) are printed 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 your line type, you can select from the following values:

Print on Audit Reports: Requirement line information (the Long Description and required parameters) is always printed on the report.

Do Not Print: Requirement line information (as well as line item parameter information) is never printed on the report.

Do Not Print Line Detail: If line detail is used to satisfy this requirement, the information is not printed on the report.

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

Skip Printing of This Level: Requirement lines are not printed on the report.

This field is not used in analysis; it affects the printout format only.

Credit Include Mode

Select the value that determines how you want the courses in the requirement line to be included in the degree audit.

All Stats: All course statistics are reported.

Excl GPA: Courses in this requirement line are excluded from the GPA, if any, on the Line Item Parameters page. This value is more commonly used at the

lower level of requirement or at the requirement line level to prevent the GPA from certain courses being used at the higher level of requirement.

Verify: The application verifies that the course was taken, but credit is not recorded, so the course can be used elsewhere in the audit. However, the course is counted towards requirement line completion. This value is commonly used 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 field value is *Verify*, the parameters (Minimum Units and Maximum Units Allowed field 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 less 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, thus 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 indicate whether a List Include Mode field value or course list specification, or both must be contained within each line item detail.

Important! The default check box status is clear, and you should not select the check box 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.

Note. See the *Warning!* text and the examples regarding this option at the end of this term table.

Count Attempts

Select if all attempts at a course should be counted during the degree audit process. If selected, 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. If this check box is selected, the student has a course count of 2, which is used by the Line Item Parameters page to satisfy minimum and maximum course requirement parameters. In addition, the GPA as well as units and course count of the course are included in the degree audit. However, if that course has a repeat code attached to it that indicates the course is not included in the GPA, the repeat code is obeyed. (Repeat codes are established on the Repeat Scheme table.)

Warning! When the Line Detail Type on the Line Item Detail page is *DLST* (derived list), all attempts at a course are counted as if the Count Attempts check box is selected. Refer to Line Detail Type of Course List or Derived Course List for detailed information concerning how a line detail type of derived course list affects the Count Attempts check box.

Display Select Line

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

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

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

We recommend that you use the summary pages (located under Define Academic Requirements) in order to view historical course list information.

If the Override Standard Set Logic check box is selected, the Display Select Line check box is unavailable for entry. This check box is also unavailable for entry if the Print Control field value selected on this page is other than *Print on Audit Reports* or *Print If There is Line Detail*.

Enable Splitting

Select if units can be split during the processing of this line number. For example, if this check box is selected, and a requirement calls for 10 units, but a student took four 3-unit courses, the units are split, and only 10 units are used to satisfy the requirement. The remaining two units can be used to satisfy another requirement. If this check box had not been selected in the above example, all 12 units would have been used to satisfy the 10-unit requirement.

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

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

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

Using the Override Standard Set Logic Check Box

If the 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 (union, subtraction, and intersection) are listed under List Include Mode.
- When the detail line is a course list, the List Include Mode and Course List field on the Line Item Detail page must contain values except as specified in the preceding item.
- When the detail line is a derived course list, 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, above.
- Standard logic (to combine this list with the previous list) is in effect.

For example, standard set logic acts as follows:

Line 1: A

Line 2: intersect B

Line 3: union C

Line 4: subtract D, resulting in the equation $((A \cap B) \cup C) - D$

If the check box is selected:

- Any detail line can have a blank List Include Mode field.
Four operators are listed under the List Include Mode field because *Complement* list operation is allowed.
- When the detail line is a course list, either the List Include Mode field or the Course List field (but not both) on the Line Item Detail page can be blank.
- When detail line is derived course list, 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.

For example, override standard set logic acts as follows:

Line 1: A.

Line 2: B.

Line 3: intersect.

Line 4: C.

Line 5: D.

Line 6: subtract.

Line 7: union, resulting in the equation $(A \cap B) \cap (C \cap D) \cup$

Note. When the Override Standard Set Logic check box is selected, each course list (set) and operator must be placed 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 the operator and a list are placed on the same line, the previous set is affected.

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

A union B intersect C subtract D.

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

A B union C intersect D subtract.

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

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

Here is another example:

Math courses intersected with 200-level courses intersected with transfer courses unioned with Math courses intersected with 100-level courses intersected with transfer courses. This would produce one list of 100- and 200-level transfer Math courses. To create this, use override set logic as follows:

Line 1: Math courses

Line 2: 200-level courses

Line 3: intersect

Line 4: transfer courses

Line 5: intersect

Line 6: Math courses

Line 7: 100-level courses

Line 8: intersect

Line 9: transfer courses

Line 10: intersect

Line 11: union

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

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

Line 1: Math courses (A).

Line 2: intersect 200-level courses (B).

Line 3: intersect transfer courses, labeled C.

Line 4: intersect Math courses, labeled A.

Line 5: intersect 100-level courses, labeled D.

Line 6: intersect transfer courses, labeled C.

Line 7: union.

This example would process as follows:

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

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

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

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

Z intersect C = nothing, labeled R.

Union = nothing.

Setting Up a Requirement Line Item Detail

Access the [Line Item Detail](#) page.

The screenshot displays the 'Line Item Detail' page. At the top, there are tabs: 'Requirement', 'Parameters', 'Line Item', 'Line Item Parameters', and 'Line Item Detail'. The 'Line Item Detail' tab is selected. Below the tabs, there are two 'View All' buttons with '1 of 1' indicators. The main content area shows the following details:

- Academic Requirement:** 000001089
- Description:** Psych Stats Requirement
- Effective Date:** 02/02/1900
- Status:** Active

Below this, there is a section for the **Line Item** with the following details:

- Line Nbr:** 0010
- Descr:** Psych Stats

Under the Line Item, there is a **Line Item Detail** section with the following details:

- *Line Detail Sequence:** 1
- *Line Detail Type:** CLST (with a magnifying glass icon)
- Course List:** 000000070 (with a magnifying glass icon and a 'View' button)

There are also '+' and '-' buttons next to the *Line Detail Type field.

Line Item Detail page

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

Line Detail Sequence

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

Line Detail Type

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.

Select a line detail type. Values are:

CLST (course list): Specifies 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 than a derived course list line detail type. (Repeat codes are defined on the Repeat Scheme table.) Requirements that use a course list line detail type pull in only courses that earn credit. As a result, if the repeat scheme is set up to allow multiple all attempts of a course to earn credit, then multiple attempts of the same course are used to satisfy the requirement. Requirements that use a derived course list line detail type pick up all courses, even those that do not earn units.

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

Warning! When the line detail type is *CLST*, the advisement engine does not pull courses with no earned credit into the evaluation of the requirement because non-credit-earning courses 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 non-credit-earning classes. When these attempted classes 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*, then the characteristics of the course list line detail type prevail, and no non-credit earning courses are pulled into the requirement.

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

Warning! When the line detail type is *DLST*, the advisement engine is designed to pull 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 field 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. The units shown in this requirement should be considered as the units attempted because those values are used to calculate the GPA. To establish a requirement for overall units using a line detail type of *DLST* and a List Recall Mode field value of *All Courses*, the units attempted (which are displayed for courses that did not earn credit), will be used to satisfy any unit requirements. To have non-credit earning courses eliminated from this requirement, establish a minimum grade point per unit on the Line Item Parameters page.

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

List Include Mode

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

Important! If the Display Select Line check box is selected on the Line Item Parameters page, then the List Include Mode field value is set to *Y*. If the Override Standard Set Logic check box on the Line Item Parameters page is selected, then the possible List Include Mode field values include *C* (complement).

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

Condition Requirement Line Type Fields

Academic Institution

The system displays the academic institution that you defined on the Requirement page. This field is used for prompting, not analysis. Each academic requirement is associated with only one academic institution.

Academic Career

Enter the academic career that is associated with this particular condition. (The value in this field might not match the academic career specified on the Requirement page.)

Condition Code

Select the condition code that indicates which field in the database is to be checked by 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 same plan when the student has only one plan. Academic Program and Primary Academic Program reference the 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. Student Groups indicates that all student groups containing a student are part of the equation. Table Entry is a condition code that enables you to select one of the dynamic conditions that has been previously created in the Define Dynamic Condition component. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Values are:

None: No field value.

Academic Level: Student's year of study. (For example, *freshman* and *sophomore*.) This value is evaluated against the student based on whatever as of date is specified at runtime.

Academic Plan: 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: Student's academic program.

Academic Programs: All of a student's programs are part of the evaluation.

Academic Standing: Student's standing at the institution. (For example, values might include good standing, probation, and dismissal. Valid values are defined on the Academic Standing table.) This value is evaluated against the student based on the as of date you specify at runtime.

Academic Sub-Plan: Student's sub-plan.

Academic Sub-Plans: All of a student's sub-plans are part of the evaluation.

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).

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

Important! The primary academic plan is the plan designated by the lowest plan sequence number on the Student Plan page, and primary academic program is the program 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 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: 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 Number 0.)

Student Group: Student's student group. (For example, values might include athlete and veteran.) Values are defined on the Student Group table.

Student Groups: All of a student's student groups are part of the evaluation.

Table Entry: Student's with this dynamic condition (that has been previously created in the Define Dynamic Condition component).

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

Condition Operator

Identifies what type of comparison is to be applied to the condition data. Condition operators include *Equal*, *None*, *< or =*, *> or =*, *Greater*, *In*, *Not In*, *Less*, and *Not Equal*. (*None* converts to *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 in any way. Any modifications to these values will require a substantial programming effort.

Condition Data

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

Course List Line Detail Type

Course List	Indicates a group of classes that comprises a course of study or select a course list from the available course list numbers.
View	Click to access the Course List Summary page where you can review the course list details.

Derived List Line Detail Type

List Recall Mode	If you have a Line Detail Type of Derived List, select the list recall mode that indicates the conditions that are used to select courses from the student’s transcript. Values are:
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None: No field value.

2-year Institution Transfer Courses: All 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, a school can be identified as a two-year or four-year institution.

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

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

Important! A requirement group reporting sequence number of 900 or greater ensures that all courses are considered during an audit.

All Courses: All courses on a student’s transcript for all careers.

Courses in Target Career: All courses (including internally transferred courses) that are taken 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, the target career is *Undergraduate*. (During an audit, the advisement engine uses all courses that are taken by a student 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 allowable in the requirement, all transfer credit that is posted to the target career will be 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 field value *Courses in Target Career* to block the cross-sharing of courses from one career to another.)

Credit with No Designation: All courses with no requirement designation.

Grade Category: All courses are assigned a grade that belongs to a particular grade category. (When this field value is entered, 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.

Include in GPA Courses: All courses that are completed with a grade that is defined on the Grading Scheme table as *Include in GPA*.

Internal Transfer Credit: Course 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. This field value is used 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*. Previously, these courses were coded *EN*.

Other Credit: Course equivalents that are awarded through the Other Credits component.

Taken After Limit (#Units) and *Taken Before Limit (#Units):* Courses that are taken after or before a unit limit, respectively. Enter the unit limit in the Quantity field. (The units are evaluated 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, the begin date of the articulation term (to which the credit is posted) is used to determine whether the credit is valid for the particular derived course list.

Note. Any of the term-related values for List Recall Mode refer to terms in which the student was enrolled in at least one course. Terms not attended by a student are of no consequence.

Taken Before Term in Residence Nbr: Counts the courses taken before the term indicated. (This value pulls in home courses as well as transfer courses taken prior to the term 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, the begin date of the articulation term (to which the credit is posted) is used to determine whether or not the credit is valid for the particular derived course list.

Warning! The term value used here is not related to or based on the value that is used in the Term Activation component. PeopleSoft 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 were taken 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, the begin date of the articulation term (to which the credit is posted) is used to determine whether or not the credit is valid for the particular derived course list.

Taken in Consecutive (#Terms): 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 3 courses taken in 2 consecutive terms, the results could be 3 courses from Fall 1997 and Spring 1998, 3 courses from Spring 1998 and Fall 1998, 3 courses from Fall 1998 and Spring 1999, and 3 courses from Spring 1999 and Fall 1999. In this example, 5 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, the begin date of the articulation term (to which the credit is posted) is used to determine whether or not the credit is valid for the particular derived course list.

Taken in Last (#Terms): 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 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, the begin date of the articulation term (to which the credit is posted) is used to determine whether or not the credit is valid for the particular derived course list.

Taken in Last (#Units): Indicates how many consecutive units are to be checked. These units begin with the most recent units taken and go back in time; for example, first Fall 1996, then Summer 1996, and then Spring 1996. Enter 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, the begin date of the articulation

term (to which the credit is posted) is used to determine whether or not the credit is valid for the particular derived course list.

Taken in Last Graded (#Terms): Indicates 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 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, the begin date of the articulation term (to which the credit is posted) is used to determine whether or not the credit is valid for the particular derived course list.

Taken While in Residence: Indicates home courses taken while the student is in residence regardless of career.

Test Credit: Indicates course equivalents awarded through the Test Credits component.

Transfer Credit: Course 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. This transfer credit is input into the system using the Course Credits component.

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.

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

Note. 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 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: Includes all courses used by the requirement groups that point to the student's primary academic plan. The primary academic plan 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.) Note that *Used By...* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

Used by Primary Academic Program: Includes all courses used by the requirement groups that point to the 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.) Note that *Used By* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

Used by Requirement Group: Indicates all courses 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, the effective-dated row selected by the advisement engine is 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 due to an unsatisfied precondition, 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 due to an unsatisfied precondition, a false occurs. Note that *Used By* means used by an *All Stats* or *Excl GPA* requirement group. Verified courses are not picked up.

Used by Requirement: Indicates all courses used by a specific requirement. Enter the appropriate requirement in the Academic Requirement field. (A requirement line number in the Line Nbr field is optional. If this field is left blank and there are multiple lines in the requirement, then all lines are evaluated.) If the requirement has two effective-dated rows, the effective-dated row selected by the advisement engine is 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 that does not exist for the student due to an unsatisfied precondition, a false does not occur. If the check box is not selected and a line detail type of *DLST* points to a requirement that does not exist for the student due to an unsatisfied precondition, a false occurs. Note that *Used By* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

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

Recall Interpretation

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

Select a recall interpretation mode. Values are:

None: Acts like All Components Combined.

All Components Combined: All course partitions are combined.

Component with Max Course: The partition containing the most courses is used. For example, a partition consisting of five Spanish classes would be used rather than a partition of three Italian classes.

Each Component: 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 grouped by parentheses. Vectors are used in the computations resulting from this field value (*Each Component*). A vector is defined as a list of lists and is used only at the requirement level. The *Each Component* field 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.

Recall Interpretation Examples

The lists that are recalled by the Recall Interpretation field consist of courses that are selected by a requirement. The field causes the audit to dynamically determine how the courses used by the requirement should be viewed.

- Example 1

Requirement A needs to fulfill two partitions: Line 10 requiring one course from a course list of Latin Studies OR Line 20 requiring two courses from a course list of Greek Studies OR Line 30 requiring three courses from a course list of Ethnic Studies. The student has completed three classes in each course list: Latin 100, 110, and 200; Greek 100, 250, and 265; and Ethics 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 field value of *Used by a Requirement*. If requirement A is specified in the Academic Requirement field, then the Recall Interpretation field value specified in requirement B determines how the courses that are used by requirement A are returned to requirement B. If the field value is *None* or *All Components Combined*, the derived list that is created consists of all courses that are used in all partitions of requirement A.

In this example, one Latin course and two Greek courses are used. If the field value is *Component with Max Courses*, 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 two Greek courses would be returned. Even if the student had successfully completed 10 Latin classes, the derived list evaluates only the number of courses that are used in each component and selects the one with the most classes.

In this instance, the classes that satisfy Line 20 are used because Line 10 uses only one course and Line 30 does not pull in any courses because Lines 10 and 20 satisfy the two minimum partitions. When the Recall Interpretation field value is *Each Component*, the derived list is a list of lists that lists the comprising 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 indicates courses that were awarded a grade that is defined on the Grading Scheme table 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 field value on the Course List Parameters page allows transfer courses and the Valid Attempt check box is selected for the appropriate Grade Input field 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* field 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.

Requirement Line Item Examples

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

- Example - Interpretation of 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 if the 2-unit part or the 1-unit part will be used by the requirement. Consequently, 2 units minus 1 unit equals 2 units because the units selected are assumed to be different parts of the course. Also, 2 units minus 2 units equal 1 unit.

- Example - Interpretation of 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.

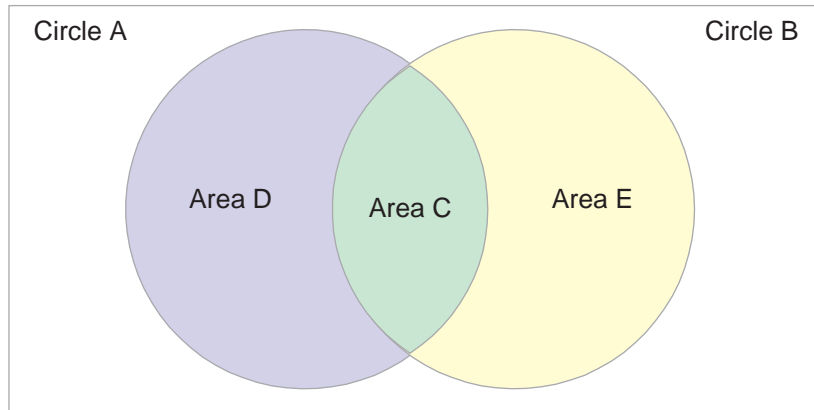
- Example - Interpretation of Complement of a Split Course

The complement of 1 unit is 2 units. As the diagram below indicates, a complement is an item not common to both areas.

- Example - Interpretation of Union of a Split Course

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

The following charts illustrate field value examples and field value set operations.



Union = Total of Both Circles

$$\mathbf{A \text{ union } B = D + C + E}$$

Subtraction = One Circle Minus Common Elements of Another

$$\mathbf{A \text{ subtract } B = D}$$

Intersection = All Items in Common

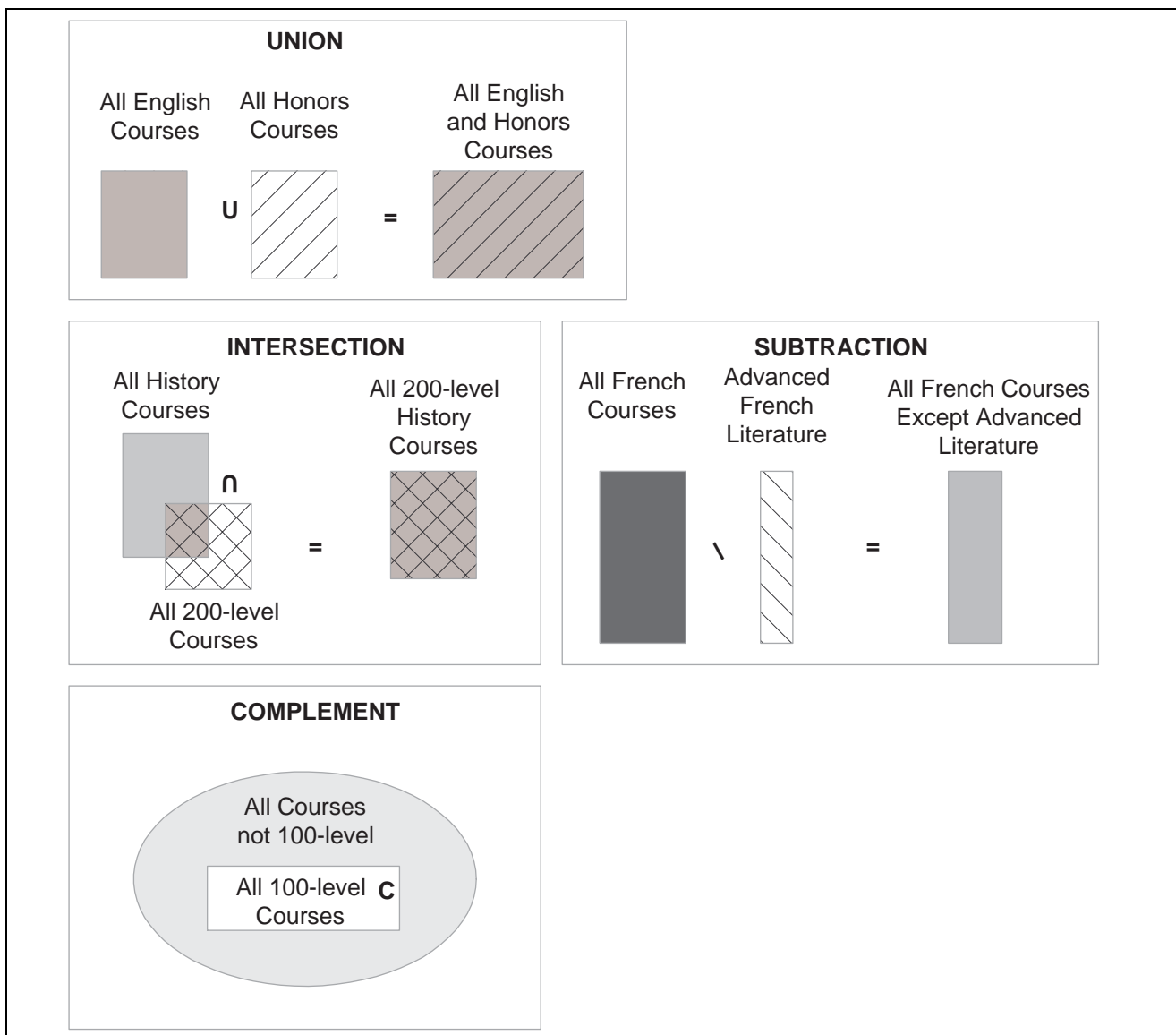
$$\mathbf{A \text{ intersect } B = C}$$

Complements = Items Not Common to Both; Only Works on a Single Set

$$\mathbf{A^c = E \text{ and Everything Outside the Circles}}$$

$$\mathbf{A^c \text{ intersect } B = E}$$

List Include Mode field value examples



List Include Mode field value set operations

Once a new row is inserted, if the new line detail type is *CLST*, the List Include Mode field value affects the Course List field value.

Once a new row is inserted, if the new line detail type is *DLST*, the List Include Mode field value affects the List Recall Mode field value.

Special rules of set operation and list recall mode apply if the line type specified on the Line Item page is *Global Sequential Restriction*; *Sequential Restriction*; *Global Limit*; *Unit*, *Course*, or *GPA Limit*; or *Specified Courses*.

Line Type	DLST Allowed?	CLST Allowed?	Override Standard Set Logic Check Box
Global Sequential Restriction	No	All but U	Not Available
Sequential Restriction	PL, PPL, PR, PPR, USE, GUS, DLST-1 and I	All but U	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 but U	Not Available

Legend

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

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Transfer Credit Processing,”
Defining External Organizations

PeopleSoft 8 SP1 Student Records PeopleBook, “Processing Transfer Credit,” Processing Other Transfer Credit

CHAPTER 5

Setting Up Academic Requirement Groups

This section provides an overview of academic requirement groups, and discusses how to set up an academic requirement group.

Understanding Academic Requirement Groups

Academic requirement groups are the highest level “parent” record, that consist of detail lines pointing to conditions, courses, and requirements as well as parameters that include unit and course requirements. Requirement groups are set up to 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 plus other pertinent academic data (such as catalog year, also known as requirement term) to determine which requirement groups it should apply to the student.

The academic advising engine compares a student’s career, program, plan, sub-plan, and pre-condition 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.

The academic structure (as reflected by the academic career, academic program, academic plan, and academic sub-plan), Reporting Seq (reporting sequence) field on the Requirement Group page, and 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 sub-plan requirement groups. For requirement groups that are set up at the same academic structure level and with the same reporting sequence number, the system applies them in requirement group number order.

In this scenario, the following processing order would occur:

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 no plans or sub-plans applied to the student are to be evaluated prior to the program or plan (see Altering Academic Structure Processing) 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 would process and report 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 sub-plan-level requirement groups. If the requirement groups listed above all had different reporting sequence numbers, the groups would be processed and reported in the following 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

Sub-plan Level

Requirement Group #700, Reporting Sequence #1

Reporting Sequences of 900 and Greater

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

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

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

Multiple Programs, Plans, and Sub-Plans

Advisement audits are generated by career. The career requirement groups as well as the primary academic program (which is the program with the lowest career sequence number) are evaluated first. Then the primary plan (which is the plan with the lowest plan sequence number) associated with this program is evaluated, and then all the sub-plans 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 sub-plans. 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)

Sub-plan attached to plan 10

Secondary plan (plan sequence number 20)

Sub-plan attached to plan 20

Secondary program (career sequence number 1)

Plan attached to secondary program

Altering Academic Structure Processing

Users are able to alter the academic structure processing by selecting the Evaluate plan before program check box and the Evaluate sub-plan before plan check box on the Academic Plan Table page and the Academic Sub-Plan Table page, respectively.

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

For example, if the plan in the above example were selected to evaluate before the program, the following would be the processing order, while the reporting order would remain the same as before.

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 sub-plans designated on the first page (Requirement Groups) of the Academic Requirement Groups component. If a plan is appended to another plan on the Plans Appended page, the requirement uses the characteristics of the first plan, not the appended plan. For example, requirement group 200 is set up as PSUNV/UGRD/FAU/MUSIC and appends a plan of PSUNV/UGRD/LAU/PSYCH. On the Academic Plan table for the music plan, the Evaluate Plan Before Program check box is not selected. On the Academic Plan table for the psychology plan, the Evaluate Plan Before Program check box is selected. The psychology plan requirement groups that are appended to the music plan requirement groups are evaluated after the program.

Setting Up an Academic Requirement Group

Here's how to create an academic requirement group:

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

Pages Used to Set Up an Academic Requirement Group

Page Name	Object Name	Navigation	Usage
Requirement Group	ADVIS_RQRMNT_GROUP	Manage Student Records, Define Academic Requirements, Setup, Academic Requirement Groups, Requirement Group	Establish the institution, career, program, plan, and sub-plan information for a new requirement group.
Parameters	ADVIS_RQ_GRP_PARM	Manage Student Records, Define Academic Requirements, Setup, Academic Requirement Groups, Parameters	Establish the requirement group parameters or filters for this specific requirement group.
Detail	ADVIS_RQ_GRP_DET	Manage Student Records, Define Academic Requirements, Setup, Academic 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	Manage Student Records, Define Academic Requirements, Setup, Academic Requirement Groups, Detail Parameters	Establish course validation parameters. This page is blank unless the Group Line Type on the Detail page is Course or Wild Card Course.
Plans Required	ADVIS_RQRMNT_PLANS	Manage Student Records, Define Academic Requirements, Setup, Academic Requirement Groups, Plans Required	Define plans/sub-plans that are required for a specific requirement group. For example, a student with a major in English may be required to declare a specialization. You can use this page to define the required sub-plan. During the degree audit process, a student's records (not requirements) are checked. The audit is not complete until this condition is satisfied. Once a student declares a required plan or sub-plan on the Student Program page, the specific requirement groups that need to be satisfied for the plan/sub-plan appear on the degree audit report. If the student has not declared the required plan/sub-plan on the Student Program page, a generalized message appears on the degree audit report that indicates that a required plan/sub-plan has not been satisfied.

Page Name	Object Name	Navigation	Usage
Plans Appended	ADVIS_RQRMNT_SUBST	Manage Student Records, Define Academic Requirements, Setup, Academic Requirement Groups, Plans Appended	Point to established requirement groups (by academic structure) and append those groups to the requirement group identified on this page. Requirement groups that have already been established can be appended to another requirement group.

Setting Up Requirement Groups

Access the Requirement Group page.

Requirement Group Parameters Detail Detail Parameters Plans Required Plans Appended

View All 1 of 1

Requirement Group: 000110

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

***Description:** Final Residency ***Reporting Seq:** 1

***Short Description:** Final Resi ***Usage:** Academic Advisement

***Long Description:** At least 8 of the final 16 units must be taken in residence.

***Academic Institution:** PSUNV PeopleSoft University

Academic Career: UGRD Undergraduate

Academic Program:

Academic Plan:

Academic Sub-Plan:

Pre-Condition: Academic Level > or = 40 Senior

▼ Catalog Description View All First 1 of 1 Last

At least 8 of the final 16 units must be taken in residence.

☐ Enable Catalog Print

☐ Override Standard Description

Requirement Group page

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

Each requirement group is assigned a sequential, identifying number by the system that is unique to that requirement group. (However, the number can be user-assigned, if necessary.) Each requirement group consists of detail lines pointing 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 of *Academic Advisement* or a user-defined usage. 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 you want to copy. Then enter the appropriate copy mode field value. Choices include *Copy last record*, *None*, and *Copy all records*. *Copy last record* indicates that only the last effective-dated record is copied. *None* converts to *Copy last record*. *Copy all records* indicates that all effective-dated records are copied. (This field value should be used only when the requirement group to be copied has multiple effective-dated rows.) Then click OK and the specified requirement group is copied.

Note. You can copy a requirement group with a usage of *Academic Advisement* and then change the usage of the new copy to *Student Individualized Plan*. Also, if you use the copy feature to create a new requirement group, you can not 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 retyping all the field values.

Effective Date

The effective date defines when the status that you select is valid. (A new effective-dated row should be added if any of the requirement group information changes.) This date reflects the student's requirement term as determined by the requirement group.

When a requirement group is applied 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 a requirement group is defined to the plan level, then the student's plan requirement term is used to determine the effective date for the requirement group. (Student requirement terms are defined on the Student Program/Plan component.) This requirement term is then used to evaluate the current effective-dated row for all requirements and course lists that get used by the requirement group.

As an example, suppose that you apply a requirement group defined at a program level to a student. It has two effective-dated rows of 01/01/1900 and 01/01/2000. The student's academic program requirement term is Fall 1999, so the current effective-dated row for the requirement term of Fall 1999 is 01/01/1900. The 01/01/1900 requirement group points to a requirement with effective-dated rows of 01/01/1900 and 01/01/1980. Again, the student's program requirement term is used (as 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.

Status	Select <i>Active</i> when adding a new requirement group. The <i>Inactive</i> option should only be used if your institution will no longer be using this requirement group. (A new effective-dated row should be added if any of the requirement group information changes.) Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.
Description, Short Description, and Long Description	<p>The Description is used as a search key and also appears in search results for requirement groups. Type a description that describes the requirement group in a way that is meaningful as a search key. For example, a description of <i>1998 req for PSYCH</i> helps to identify this requirement group. The Short Description appears only on this page. The Long Description is the internal description of the requirement group and is also printed on the degree audit report.</p> <hr/> <p>Note. Users are able to alter the academic structure processing of requirement groups by evaluating plans before programs and/or sub-plans before plans.</p> <hr/>
Reporting Seq (reporting sequence)	<p>Indicates the sequence or order (within a specific level of the academic structure) in which a requirement group is analyzed and reported during the academic advisement process. (The default value is <i>1</i>.) There is a difference between processing order and reporting order. Processing order refers to the order in which courses are processed by the audit engine. Processing order is affected by academic structure, requirement group number, and reporting Sequence number. Reporting order refers to the order in which courses, requirements, and requirement groups are printed in the audit report.</p> <hr/> <p>Important! A reporting sequence number of 900 or above affects the processing order of a requirement group that points to a VERIFY requirement. This special sequence number keeps that particular requirement group from processing until the end of the audit. For example, a user can establish a career requirement that verifies all courses used throughout the audit. For a requirement group with a reporting sequence number of 900 or above that points to an ALL STATS requirement, the requirement group is processed at the time it is encountered. The reporting of a requirement group with a reporting sequence number of 900 remains the same in both scenarios. It is displayed last within its academic structure level.</p> <hr/>

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

Career Level

Requirement Group #1111, Reporting Sequence = 1

Requirement Group #1100, Reporting Sequence = 2

Requirement Group #1000, Reporting Sequence = 900

Program Level

Requirement Group #2001, Reporting Sequence = 1

Requirement Group #2010, Reporting Sequence = 5

Requirement Group #2050, Reporting Sequence = 5

Plan Level

Requirement Group #4700, Reporting Sequence = 1

Requirement Group #3000, Reporting Sequence = 900

Requirement Group #2005, Reporting Sequence = 901

Requirement Group #1200, Reporting Sequence = 999

Sub-plan Level

Requirement Group #700, Reporting Sequence = 1

The default value in the Reporting Seq field is 1, which results in the engine reporting requirement groups in requirement group number order within each section of the academic structure. If the requirement groups listed above all had a reporting sequence number of 1, the groups would be reported in the following 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 the value in the Reporting Seq field is changed, the advisement engine reports the requirement groups by reporting sequence number. If two or more requirement groups are assigned the same reporting sequence number (for example, 5, 10, or 900) within the same section of the academic structure, the groups are sorted by requirement group number.

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

Career and Program Levels

Requirement Group #1111, Reporting Sequence = 1
 Requirement Group #2001, Reporting Sequence = 1
 Requirement Group #1100, Reporting Sequence = 2
 Requirement Group #2010, Reporting Sequence = 5
 Requirement Group #2050, Reporting Sequence = 5
 Requirement Group #1000, Reporting Sequence = 900

Plan Level

Requirement Group #4700, Reporting Sequence = 1
 Requirement Group #3000, Reporting Sequence = 900
 Requirement Group #2005, Reporting Sequence = 901
 Requirement Group #1200, Reporting Sequence = 999

Sub-plan Level

Requirement Group #700, Reporting Sequence = 1

Usage

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

Academic Advisement: This requirement group is used during the regular degree audit process.

Student Individualized Plan: This requirement group is used as a substitute requirement group for a student or group of students, and is assigned on the Authorize Student Exceptions pages.

You can also define a special usage for a requirement group on the Requirement Usage page. Special usage values are used to isolate or point to specific groups of students with common characteristics. In addition, the special usage is designed to isolate special requirement groups that can be attached to a transcript type that can be run against any student.

Once a requirement group has been assigned this special usage, the transcript type tables can specify a special report identified by the requirement group Usage.

See [Chapter 2, “Setting Up Optional Advisement Data,” Setting Up Special Requirement Usage Values, page 14.](#)

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

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

Academic Career	Contains the academic program for this requirement group. There can be any number of academic programs within an academic career.
Academic Program	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. A value in this field is not mandatory. If a value is not entered, the requirement group applies to all programs within the specified career.
Academic Plan	An area of study (for example, major or minor) within the academic program. Some plans are subdivided into sub-plans. (A value in this field is not mandatory. If a value is not entered, the requirement group applies to all plans within the specified career or the specified program, if a program is entered on this page.) Note that the system ensures that the program or career values are valid for the plan; error messages occur, when necessary. (Some academic plans are defined only to a career, so a program is not necessary.)
Academic Sub-Plan	A further specialization within the academic plan. There can be any number of academic sub-plans within an academic plan. The sub-plan is similar in concept to the plan with each sub-plan assigned a user-defined sub-plan type (for example, a concentration or specialization). A value in this field is not mandatory. If a value is not entered, the requirement group applies to all sub-plans within the specified career or the specified plan, if a plan is entered on this page.
Pre-Condition	If the pre-condition is false for a student, the requirement group is not considered during analysis. Information is analyzed and reported only if the pre-condition is true for the student. (The default value is <i>None</i> , indicating that the field is deactivated.) If this field contains a value other than <i>None</i> , then additional fields are available in order to complete the pre-condition statement. (Possible operators for a pre-condition statement include <i>None</i> , <i><</i> or <i>=</i> , <i>></i> or <i>=</i> , <i>Equal</i> , <i>Greater</i> , <i>In</i> , <i>Less</i> , <i>Not Equal</i> , and <i>Not In</i> . <i>None</i> converts to <i>Equal</i> . Operators are not used if the pre-condition is <i>Table Entry</i> . If the

Pre-Condition is *Table Entry*, then select one of the dynamic conditions that has been previously created in the Define Dynamic Condition component.) A pre-condition is used to restrict the use of a requirement group to a particular type of student. For example, if a requirement group has a Pre-Condition of *Academic Standing Equal Good Standing*, then this requirement group is only used when the student is in good academic standing.

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

Basic pre-condition 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 Pre-Condition on the Requirement Group page. The Define Dynamic Condition component is used to define new condition specifications. On the Condition page, the description, academic institution, and Connector type of the new condition specification are established. Once a condition specification is created, you can use it as a condition *Line Type* in a requirement; as a condition *Group Line Type* in a requirement group; or as a Pre-Condition on the Requirement Group, Requirement, or Requirement Line Item page.

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

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

See [Chapter 9, “Creating and Using Expanded Conditions and Custom Conditions,” Defining Academic Entity Groups, page 134.](#)

Select a pre-condition value.

None: No pre-condition.

Academic Level: Student’s year of study. (For example, valid values include freshman and sophomore.) This value is evaluated against the student based on whatever *As of Date* is specified at run time.

Academic Plan: Student’s academic plan. *Academic Plan* and *Primary Academic Plan* reference the exact same plan when the student has only one plan.

Academic Plans: All of a student’s plans are part of the equation.

Academic Program: Student’s academic program. *Academic Program* and *Primary Academic Program* reference the exact same program when the student has only one program.

Academic Programs: All of a student's academic programs are part of the equation.

Academic Standing: A student's standing at the institution. (For example, values might include good standing, probation, and dismissal. Valid values are defined on the Academic Standing table.) This value is evaluated against the student based on whatever As of Date is specified at run time.

Academic Sub-Plan: A student's academic sub-plan.

Academic Sub-Plans: 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 student's term history cumulative statistics, in conjunction with the processing as of date).

Primary Academic Plan: A student's primary academic plan. The primary academic plan 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.)

Important! The primary academic plan is the plan designated by the lowest plan sequence number on the Student Plan page, and primary academic program is the program 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 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: 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, the primary career is designated as Student Career Nbr 0.)

Student Group: indicates a grouping of students. (For example, values might include athlete and veteran.) Valid values are defined on the Student Group table.

Student Groups: indicates that all student groups containing a student are part of the equation.

Table Entry: indicates a dynamic condition that has been previously created in the Define Dynamic Condition component.

Catalog Description

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

Enable Catalog Print

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

Override Standard Description

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

Establishing Requirement Group Parameters

Access the Parameters page.

The screenshot displays the 'Parameters' tab for Requirement Group 000127. The page is titled 'Requirement Group Parameters' and includes tabs for 'Detail', 'Detail Parameters', 'Plans Required', and 'Plans Appended'. The main content area shows the following parameters:

- Requirement Group:** 000127
- Description:** BA-English Requirements
- Effective Date:** 01/01/1900
- Status:** Active
- Minimum GPA:** [Empty field]
- Minimum Units:** 63.00
- Minimum Courses:** [Empty field]
- *Course Ranking Scheme:** Chronological
- *Reporting:** Always Report
- *Credit Include Mode:** All Stats
- Choice Resolution Method:** Satisfy in Sequential Order
- Connector Type:** AND (selected), OR
- Partition Sharing:** [Empty checkbox]
- Min Partitions to Complete:** 1
- Max Partitions to Allow Credit:** [Empty field]
- *Course Share Set:** 000000011 (LAU Dist with ENGL-BA)

Parameters page

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

The fields on this page are identical to the fields on the Requirement Parameters page. If the field values entered on the Requirement Parameters page are greater than the field values entered on the Requirement Group Parameters page, the parameters specified at the requirement level override those specified at the requirement group level. (You should *always* insert required parameters at the lowest level possible.) For example, if the requirement indicates the minimum units is 24 while the requirement group indicates a minimum units of 18, 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, the audit engine searches for 10 units.

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

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

Minimum GPA	<p>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 2.500 is entered in this field.)</p> <p>In-progress courses or grades that are not included in GPA (pass/no pass or transfer credit grades, for instance) satisfy the minimum GPA requirement.</p>
Minimum Units	Represents the minimum total units for all of the courses selected to satisfy this requirement group.
Default for Detail Level	The minimum course grade that satisfies this requirement group. This value automatically appears by default to each detail line.
Minimum GP / Unit	The minimum grade points per unit needed to satisfy this requirement group. The value in this field reflects a portion of the course validation parameters listed on the Detail Parameters page.
Minimum Course	Represents the minimum number of courses required for this requirement group. In order to include courses with 0 units, you must specify a value in this field. If the Minimum Units field contains a field value but this field does not, courses with 0 units (such as remedial courses) will not be picked up in the audit.
Course Ranking Scheme	<p>Indicates how courses are ranked when used to satisfy the requirement group. If a student has taken more courses than needed to meet the requirement group and no other information is available for course selection, the value in this field is used to decide in which order valid courses will be selected to satisfy the requirement group. (Courses are sorted in this order for this requirement group only.) Select a course ranking scheme value.</p> <p><i>Chronological:</i> Indicates that courses are ranked by term (first term to current term).</p> <p><i>Course Catalog:</i> Indicates that courses are ranked by catalog number (lowest to highest).</p>

Grade Points: Indicates that courses are ranked by grade point (highest to lowest).

Reverse Chronological: Indicates that courses are ranked by term in reverse order (current term to first term).

Reverse Course Catalog: Indicates that courses are ranked by catalog number in reverse order (highest to lowest). For example, you might want to create a requirement group that uses 400-level courses before 100-level courses. To do this, select the *Reverse Course Catalog* field value. The Course Ranking Scheme field is used to rank courses only if no other information is available that would affect course ranking. This field sorts based on the field value but 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.

Reporting

Indicates the conditions under which the requirement group is reported. Select a reporting value.

Always Report: Indicates that the requirement group is always reported, regardless of the completion status.

Report Only When Not Satisfied: Indicates that the requirement group is reported only when the student did not successfully complete it. (For example, this value could be used to report probationary status.)

Report Only When Satisfied: Indicates that the requirement group is reported only when the student successfully completes it. (For example, this value could be used to report honors status.) Except for *Always Report*, every reporting value acts as a post-condition. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Important! The Reporting field value *Report Only When Not Satisfied* behaves differently, depending on whether the Credit Include Mode field value is *All Stats* or *Verify*. For example, for a requirement with a Minimum Units of 3.00, a Credit Include Mode field value of *All Stats*, and a Reporting value of *Report Only When Not Satisfied*, the results of the audit are not as expected since the requirement group may print on the degree audit report even if it is unsatisfied. However, if the Credit Include Mode is set to *Verify*, then the result is predictable.

Credit Include Mode

Indicates how courses in the requirement group are included in the degree audit. Select a credit include mode.

All Stats: All course statistics are reported. A course captured by an *All Stats* requirement group is used for that requirement group and cannot be counted towards any other *All Stats* requirement group.

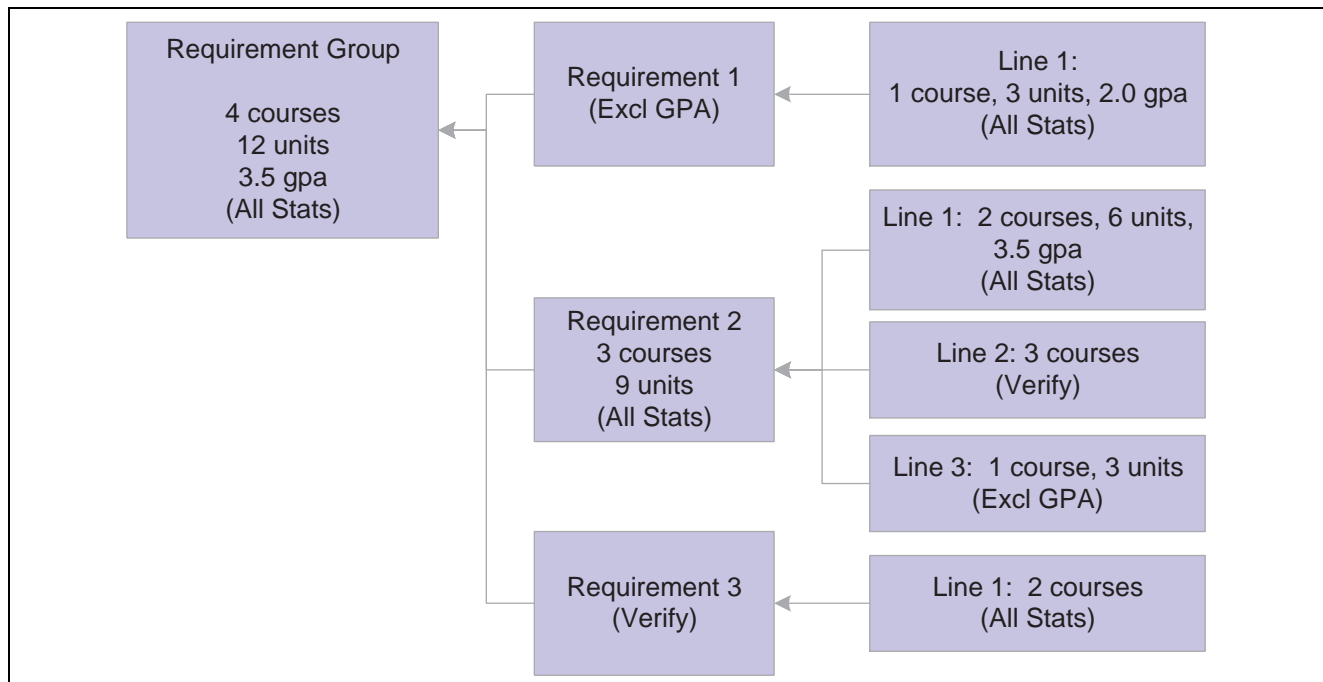
Excl GPA: Courses in this requirement group are excluded from GPA. This value is more commonly used at the lower level of requirement or at the requirement line level to prevent the GPA from certain courses being used at

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 towards any other *All Stats* or *Excl GPA* requirement group.

Verify: The application checks/verifies that the course was taken, but credit is not recorded 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 towards requirement group completion. (For example, for a graduate program electives requirement group, verify that all graduate students in the School of Education masters program complete at least two courses numbered 400 or higher in an academic area/plan other than their own.) This value is commonly used in requirements that have overall unit requirements (such as completion of 120 units to graduate), required term unit loads, or required academic standing status. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Important! When the credit include mode is *Verify*, the parameters (Minimum Units and Maximum Units Allowed field 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 less than 6 or more than 15 units, then the truth value is false. If the student is within this range, then the truth value is true. *Verify* accepts and reports all courses that match the course list and transcript whereas *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 at the top of the diagram requires a total of 4 courses for 12 units with a combined minimum GPA of 3.5. The three detail lines (requirements) contribute to these parameters according to the credit include mode value assigned at each level.



Credit Include Mode diagram

Requirement 1 has one detail line. The line requires 1 course of 3 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 only allows units and course count to contribute to the minimum parameters required at the requirement group level.

Requirement 2 requires a minimum of 3 courses for a total of 9 units. Line 1 requires 2 courses with a minimum of 6 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. Since this is the only line contributing 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 3 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 3 courses or 9 units at the requirement level. This line only helps to satisfy the overall requirement by passing a true (if the 3 courses are found) or false. Line 3 requires 1 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 course count and units are passed to the requirement level.

Requirement 3 has one detail line that requires 2 courses. Credit include mode for this line is set to *All Stats*, so courses are used to satisfy this line and course count, units, and GPA are passed to the requirement level. However, the credit include mode for the requirement is set to *Verify*, so no course information is passed to the requirement group level. This requirement passes a true or false value to the requirement group level and is used in determining the completion status of the overall requirement group.

Choice Resolution Method

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.

Satisfy in Sequential Order indicates that detail lines are evaluated in sequential order except for limits that are analyzed first. 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, 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, a course that can satisfy both Line 10 or Line 20 will be 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 will be used to satisfy Line 10, not Line 20. Note that when 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 indicates that after limits are analyzed, detail lines are sorted so as to find the best combination in regards to the requirement group. 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 is selected, if the student does not meet the requirements of any of the lines, 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, the audit lists just the courses for the satisfied partitions.

Connector Type

The main (default) Boolean operator to be used 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 joining 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. This field is used as the connector default on the Detail page when rows are inserted.

If the connector type is OR, then the following additional fields are available.

Min Partitions to Complete (minimum partitions to complete)

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, the audit engine searches for two of the three partitions.

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

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

Partition Sharing

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

Example

Suppose that the statement is (A AND B) OR (C AND D) OR (A AND F) OR (C AND G). 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, the statement is satisfied.

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

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

Defining the Requirement Group Detail

Access the Detail page.

Requirement Group		Parameters		Detail		Detail Parameters		Plans Required		Plans Appended	
View All First 1 of 1 Last											
Requirement Group:		000127		Description:		BA-English Requirements					
Effective Date:		01/01/1900		Status:		Active					
Group Line Type View 1 1-3 of 3											
				*Line:		0010				+ -	
*Group Line Type:		Requirement									
Requirement:		000001096				ENG Distribution					
Requirement Usage:		Academic Advisement									
				*Line:		0020				+ -	
*Group Line Type:		Requirement									
Requirement:		000001111				BA-ENGL Advanced					
Requirement Usage:		Academic Advisement									
				*Line:		0030				+ -	
*Group Line Type:		Requirement									
Requirement:		000001112				BA-ENGL Electives					
Requirement Usage:		Academic Advisement									

Detail page

Refresh Parentheses

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

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

(Connector Type)

The system displays this field on all line numbers subsequent to the first line. Select a value to specify how a detail line connects to the prior

detail line. If you select *NONE*, the field value automatically populates to the connector type on the Parameters page.

Line

A sequential line number that the system generates but 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.

Group Line Type

Select the type of requirement group line that you want 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. Your choices are:

Course: Specifies a course that a student must take. This is less robust than using a requirement line that points to a course list.

Requirement: Specifies 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: Specifies a course range based on values of the subject area and course catalog number using special wild card characters. Equivalent courses are not included in this match.

Condition: Specifies a condition (or conditions) that the student must satisfy. For example, you can require the completion of a specific milestone.

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

Institution

This is a display-only field. Each requirement group is associated with only one academic institution.

Condition Code

Enter a condition code that indicates which field in the database you want the system to evaluate. For example, *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.

Your choices are:

None: No field value.

Academic Level: 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* you specify at run time.

Academic Plan: Student's plan (for example, major or minor) within the academic program.

Academic Plans: All of a student's plans are part of the equation.

Academic Program: Student's program of study.

Academic Programs: All of a student's programs are part of the equation.

Academic Standing: Student's academic standing at the institution. (For example, values might include good standing, probation, and dismissal. Valid values are defined on the Academic Standing table.) The system evaluates this value against the student's standing (defined in term statistics) based on the As of Date you specify at run time.

Academic Sub-Plan: Student's sub-plan.

Academic Sub-Plans: 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 student's term history cumulative statistics, in conjunction with the processing as of date).

Primary Academic Plan: Student's primary academic plan. The primary academic plan 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 with the lowest Student Career Number.)

Important! The primary academic plan is the plan designated by the lowest plan sequence number on the Student Plan page, and the primary academic program is the program designated by the lowest career sequence number on the Student Program page. However, 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 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: A student's primary academic program. The primary academic program is the program designated by the lowest career sequence number.

Student Group: A student's academic group, such as athlete or veteran. Valid values are defined on the Student Group Table page.

Student Groups: All of a student's student groups are part of the equation.

Table Entry: A dynamic condition that you create in the Define Dynamic Condition component.

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

Condition Operator

The type of comparison you want to apply to the condition data. Condition operators include *Equal*, *None*, *< or =*, *> or =*, *Greater*, *In*, *Less*, *Not Equal*, and *Not In*. *None* converts to *Equal*. Use an operator that makes sense in the equation. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Condition Data

The value you want 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 is *Table Entry*, then select a previously created dynamic condition.

If the group line type is *Course*, the following fields are available:

Course ID

The course needed to satisfy this requirement.

Include Equivalent Courses

Select in order for the system to include in its evaluation both the course ID 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, the following fields become unavailable: Term, Associated Class, and Topic ID.

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

Term

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

Associated Class

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

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

See *PeopleSoft 8 SPI Student Records PeopleBook*, “Managing the Schedule of Classes,” Defining Class Associations.

Topic ID

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

See *PeopleSoft 8 SPI Student Records PeopleBook*, “Setting Up the Course Catalog,” Defining Course Catalog Data.

If the group line type is *Requirement*, the following fields are available:

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

If the group line type is *Wild Card Course*, the following fields are available:

Academic Institution	This is a display-only field. Each requirement group is associated with only one academic institution.
<hr/> Important! If you do not enter an academic group, subject, or catalog number, the system returns all values. <hr/>	
Academic Group and Subject	Enter the appropriate academic group and subject of the course.
Catalog Nbr (catalog number)	<p>Select the catalog number using a combination of real numbers, letters, pound sign symbols, and asterisks. The pound sign (#) is used to wild card the numeric portion of the catalog number and the asterisk (*) is used to wild card the alpha portion of the catalog number. The catalog number field format is NNNNAAAAAA where N indicates a numeric value and A indicates an alpha value. For example, a catalog number of 3## indicates that any 300 level course is acceptable, including 301A, because suffixes are ignored when a number wild card is specified unless a suffix value is exclusively indicated. In another example, a catalog number 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 wild card any position in the field.</p> <p>When using wild cards, courses that are equivalent to the wild card course you specify are <i>not</i> evaluated. (This is an efficiency constraint that has been applied.) In addition, requirement groups with a group line type of <i>Wild Card Course</i> act like requirements with a line detail type of <i>CLST</i> on the Line Item Detail page and do not pull courses with no earned credit into the evaluation of the requirement group.</p> <hr/> Important! Ranges are not supported in the Catalog Nbr field. Instead, you must insert multiple detail lines. For example, in one detail line, you can wild card all 100-level courses. In a second detail line, you can wild card all 200-level courses. Then connect the two detail lines with the AND connector. <hr/>

Setting Up the Requirement Group Detail Parameters

Access the Detail Parameters page.

Detail Parameters page

Course Information

If you select a detail line type of *Course*, you should define course validation parameters (values that filter what characteristics the course must possess for the system to consider it valid). Course validation parameters identify the specific parameters of the course in the Course Information field.

Minimum Units

The minimum units for the class.

Minimum Units / Crs
(minimum units per course)

The minimum number of units that each course or wild card course must provide to satisfy the requirement group.

Minimum Courses

The minimum number of classes required for this detail line.

Minimum GP / Unit

The minimum number of grade points per course unit that must be attained for a course to be included in this detail line.

Transfer Level Allowed

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

Always Allow: All applicable transfer credit can satisfy the requirement.

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

Never Allow: Transfer credit can never satisfy the requirement.

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

None converts to *Always Allow*.

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

Requirement Designation

Select to specify the course as valid only if it has this requirement designation associated with it. Typically, 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. For example, the requirement designation might indicate that the course is only valid 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, 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 a RD grade of *Satisfied* must be entered 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 a passing grade in the course to which the requirement designation is attached must be earned for designation credit to be granted. (The user defines the minimum grade needed for this default to take place.) If a requirement designation is required, then a 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, the degree audit records the requirement designation as if it were satisfied.

See *PeopleSoft 8 SPI Student Records PeopleBook*, “Preparing for the Course Catalog and Schedule of Classes,” Understanding Requirement Designations.

Valid Begin and Valid End

Date range that indicates when this course must be taken to satisfy the requirement. Leave these fields blank to indicate that the course can be taken during any time period. The system uses the start date of the term in which the course is taken.

Course Must Be GPA Material

Select if the course taken to satisfy this requirement group needs to be applied towards the student’s career grade point average calculation. The course cannot be taken on a pass/no pass or audit basis. The course must be taken for a grade.

Important! Only courses with grades for which you select the Include in GPA check box on the Grading Scheme Table page are eligible.

Test Credit is Allowed

Select if the course can be originally from the test credit portion of the student’s academic record.

Other Credit is Allowed

Select if the course can be originally from the other credit portion of the student’s academic record. Note that internal transfer credit is marked and treated as enrolled credit.

Exclude In-Progress Credit

Select if the course must be fully graded in order for the system to consider it valid. If you do not select this check box, the system will include a non-graded

course, a course with a grade of incomplete, or a course in progress as part of the academic analysis and the course will satisfy all parameters. Typically, this check box is used for enrolment requisites on the Enrollment Requirement Group component. It is usually not used for academic advising reports.

Example

In this example, the Exclude In-Progress Credit check box is selected. In order 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 of *Condition*. On the same page, create a second detail line with a Group Line Type of *Wild Card Course*. On the Detail Parameters page for detail line 2, select the Exclude In-Progress Credit check box. Now the system will verify 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 coursework completed, but at least one course in progress, will meet this requirement.

You can click the links at the bottom of this page to access other pages within this component.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook, “Setting Up Prospects,” Setting Up School Types

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Transfer Credit Processing,”
Defining External Organizations

Specifying Required Plans and Sub-Plans

Access the Plans Required page.

The screenshot displays the 'Plans Required' tab of a software interface for setting up academic requirement groups. At the top, there are tabs for 'Requirement Group', 'Parameters', 'Detail', 'Detail Parameters', 'Plans Required' (selected), and 'Plans Appended'. Below the tabs, a header bar shows 'View All' and '1 of 1'. The main form area contains the following fields:

- Requirement Group:** 000127
- Description:** BA-English Requirements
- Effective Date:** 01/01/1900
- Status:** Active
- ☒ **Other Plans/Sub-Plans Required**
- Number Required:** 1

Below these fields is a section titled 'Plans/SubPlans Required' with its own 'View All' and '1 of 1' header. This section contains the following fields:

- *Plan Sequence:** 1
- Academic Institution:** PeopleSoft University
- Academic Career:** Undergraduate
- Academic Program:** (empty field)
- *Academic Plan:** (empty field with a search icon)
- Academic Sub-Plan:** (empty field with a search icon)

Plans Required page

Other Plans/Sub-Plans Required

Select to require that students in this career and/or program declare a plan or sub-plan. If you select this check box, you do not have to enter information on the Detail page. The Detail page is not required because the system considers the required plans/sub-plan information as the requirement group detail.

Number Required

The number of plans or sub-plans (from the list you specify) that the student must declare. If field is left blank, all plans and sub-plans that you list are required. For example, if this were a Business major requirement group, you could insert sub-plans here for each Business major area of specialization, then enter a number required value of 1, to indicate that all Business majors must declare at least one sub-plan in one of the areas you define.

Plan Sequence

Indicates the search order of multiple plans or sub-plans, if any. The system will first see if the student has the item you list with the lowest sequence number, and continue 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, the system populates the *Academic Program* field when you enter an *Academic Plan* (if the academic plan is tied to a program).

Academic Plan

The required plan (for example, major or minor) for students in the academic program and/or career that you specify on the Requirement Group page.

Academic Sub-Plan

The required sub-plan (for example, specialization or concentration) for students in the academic plan and/or career that you specify on the Requirement Group page.

Example

To graduate with a BA in English, a student must declare a career of UGRD, a program of LAU, and a plan of ENGLISH. This student must also satisfy one of three sub-plans: CREATIVE WRITING, LITERATURE, or CLASSICS.

Use this page to indicate that a sub-plan is necessary for graduation. Select the Other Plans/Sub-Plans Required check box. Enter a 1 in the Number Required field. For Plan Sequence 1, enter an academic plan of *ENGLISH* and an academic sub-plan of *CREATIVE WRITING*. For plan sequence 2, enter an academic plan of *ENGLISH* and an academic sub-plan of *LITERATURE*. For plan sequence 3, enter an academic plan of *ENGLISH* and an academic sub-plan of *CLASSICS*.

Once the student declares a sub-plan on the Student Program page, the degree audit report lists the requirement groups that are satisfied or need to be satisfied for the sub-plan. Until the student declares a sub-plan, the degree audit report indicates that a required sub-plan 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 within this component.

Identifying Appended Requirement Groups

Access the Plans Appended page.

The screenshot shows the 'Plans Appended' page in a PeopleSoft application. At the top, there are tabs: 'Requirement Group', 'Parameters', 'Detail', 'Detail Parameters', 'Plans Required', and 'Plans Appended'. The 'Plans Appended' tab is selected. Below the tabs is a header bar with 'View All' and '1 of 1'. The main content area displays the following information:

- Requirement Group:** 001500
- Description:** BA-English Requirements
- Effective Date:** 01/01/1900
- Status:** Active

Below this information is a section titled 'Include Requirement Groups for:'. It contains the following fields:

- Academic Institution:** PeopleSoft University
- Academic Career:** UGRD (with a magnifying glass icon)
- Academic Program:** LAU (with a magnifying glass icon)
- Academic Plan:** CLSC-BA (with a magnifying glass icon)
- Academic Sub-Plan:** (empty field with a magnifying glass icon)

Plans Appended page

You can attach requirement groups from a different academic structure (career, program, plan, and sub-plan) 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 sub-plans that have virtually identical requirements, you can create them for one of the two groups, then simply append the requirements to the other group through the plans appended page.

If this page is used, then the Detail page is not required since the appended requirement group plans are considered as the requirement group detail.

On the audit report, an appended requirement group prints with the requirement group to which it is attached. So, if a requirement group is appended to one at the career level, then the appended group prints with the career-level requirement groups.

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

Enter the data that matches the already existing requirement groups that you want to append. This data is used during analysis to search for requirement groups that match the structure defined on this page. Blank fields are ignored, and a requirement group is appended only if all the non-blank field values match exactly.

CHAPTER 6

Reviewing the Requirement Group, Requirement, and Course List Summaries

This chapter discusses the PeopleSoft Academic Advisement summary pages, which provide high-level overviews of core advisement functionality. Specifically, this chapter discusses how to:

- Review academic requirement group summaries.
- Review academic requirement summaries.
- Review advisement course list summaries.

Reviewing Academic Requirement Group Summaries

Use the Academic Requirement Group Summary component to view summaries of academic requirement groups, which include detail about each group's academic requirements and requirement lines. Each academic requirement group consists of the following 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.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Setting Up Enrollment Requisites,"
Viewing Enrollment Requisite Summary Information

Pages Used to Review Academic Requirement Group Summaries

Page Name	Object Name	Navigation	Usage
Requirement Group Summary	ADVIS_RQ_GRP_SUMM	<ul style="list-style-type: none"> • Manage Student Records, Define Academic Requirements, Inquire, Academic Rqrmnt Group Summary, Requirement Group Summary • Manage Student Records, Establish Courses, Inquire, Enrollment Requisite Summary, Enrollment Requisite Group 	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	Manage Student Records, Define Academic Requirements, Inquire, Academic Requirement Group Summary. Click the requirement group name.	Review the description of the academic requirement group.
Requirement Summary	ADVIS_RQ_SUMMARY	<ul style="list-style-type: none"> • Manage Student Records, Define Academic Requirements, Inquire, Academic Requirement Summary, Requirement Summary Click the specific academic requirement. • Manage Student Records, Establish Courses, Inquire, Enrollment Rqrmnt Summary, Enrollment Requirement Summary 	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	Manage Student Records, Define Academic Requirements, Inquire, Academic Requirement Group Summary Click requirement group name. On Requirement Summary page, click the requirement name.	Review the description of the academic requirement, which automatically populates from the Academic Requirements component.
Requirement Line Description	RQ_LN_SUMM_DESC	Manage Student Records, Define Academic Requirements, Inquire, Academic Requirement Group Summary Click the requirement name to access the Requirement Summary page. Click a specific academic requirement line.	Review the long description and requirement description for a specific academic requirement line.

Reviewing Academic Requirement Summaries

Use the Academic Requirement Summary component to review a summary of a specific academic requirement.

These pages are the same as the corresponding pages of the Academic Requirement Group Summary component. However, through the Academic Requirement Summary component they provide a direct view of academic requirements as they exist separate from academic requirement groups.

See Also

Chapter 4, “Setting Up Academic Requirements,” page 29

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Enrollment Requisites,”
Viewing Enrollment Requisite Summary Information

Chapter 6, “Reviewing the Requirement Group, Requirement, and Course List Summaries,”
Reviewing Academic Requirement Group Summaries, page 113

Reviewing Advisement Course List Summaries

Use the Advisement Course List Summary component to review a summary of specific academic course lists, including descriptions of each course on an academic course list. This component is shared with PeopleSoft Student Records, where you can view enrollment course list details.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Enrollment Requisites,”
Viewing Enrollment Requisite Summary Information

Chapter 3, “Setting Up Academic Course Lists,” page 19

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Enrollment Requisites,”
Defining Enrollment Course Lists

Pages Used to Review Advisement Course List Summaries

Page Name	Object Name	Navigation	Usage
Course List Summary	RQ_COURSELIST_SUMM	<ul style="list-style-type: none"> • Manage Student Records, Define Academic Requirements, Inquire, Advisement CourseList Summary, CourseList Summary • Manage Student Records, Establish Courses, Inquire, Enrollment CourseList Summary, CourseList Summary 	View a summary of a specific academic course list.
Course Description	CLST_SUMM_DESC	Manage Student Records, Define Academic Requirements, Inquire, Academic Course List SummaryClick a specific course.	View the course description for a specific course ID on an academic course list.

CHAPTER 7

Sharing Courses

This chapter provides an overview of sharing courses and discusses how to set up course share sets.

Understanding Course Sharing

By default, a course cannot be used by more than one requirement group. However, by using a course share set, courses can be shared by more than one requirement group. A course share set is a tag that defines a set of requirement groups that can share courses.

You use several pages to set up the sharing capabilities of PeopleSoft Academic Advisement.

Here's how to share courses:

1. Define as many course share sets as necessary on the Course Share Sets page.
2. Indicate, on the Requirement Group Parameters page, if a requirement group belongs to a course share set that enables it to share courses with another group.

Note. Course share sets are used after the requirement groups, requirements, and course lists are defined. 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.

See Also

Chapter 5, "Setting Up Academic Requirement Groups," page 81

Setting Up Course Share Sets

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

Pages Used to Set Up Course Share Sets

Page Name	Object Name	Navigation	Usage
Course Share Sets	CRSE_SHARE_SET	Manage Student Records, Define Academic Requirements, Setup, Course Share Sets, Course Share Set	Enable courses to be shared by more than one requirement group.

Establishing Course Share Sets

Access the Course Share Sets page.

Course Share Sets

View All
First
1 of 1
Last

Course Share Set: 000000010

+

-

***Effective Date:** 02/02/1900

📅

Active

***Description:** Psych/GE Share

Requirement: 000001133

🔍

Restrict Psych

Requirement Groups in Share Set

1-2 of 2

		Institution	Career	Program	Plan
000115	LAU GE Distribution	PeopleSoft University	Undergrad	Lib Arts	
000116	Psychology Requirements	PeopleSoft University	Undergrad	Lib Arts	Psychology

Course Share Sets page

Course Share Set

This is the identifying number of the tag that you are establishing. This tag defines the requirement groups that can share. 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) Choose the academic requirement number that places restrictions on course sharing for this share set.

Choose the academic requirement number that places restrictions on course sharing for this share set. The academic requirement must have a usage value of *Requirement Course Share Restriction*. (Requirement course share restrictions are established in the Academic Requirements component.)

It is not necessary to enter a value in the Requirement field. If no value is entered, then there is no restriction on what courses or units can be shared. For restricted sharing, you must specify a requirement. Restricted sharing is needed 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 are displayed under Requirement Groups in Share Set are the groups that are using the share set. There must be more than one group listed in order for sharing to be in effect.

Note. After a course share set is established and used on the Requirement Group Parameters page, the requirement groups affected are then listed on the Course Share Sets page under the appropriate course share set.

Example

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

Course Share Sets

View All First 1 of 1 Last

Course Share Set: 000000010 + -

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

***Description:** Psych/GE Share

Requirement: 000001133 🔍 Restrict Psych

Requirement Groups in Share Set 1-2 of 2

		Institution	Career	Program	Plan
000115	LAU GE Distribution	PeopleSoft University	Undergrad	Lib Arts	
000116	Psychology Requirements	PeopleSoft University	Undergrad	Lib Arts	Psychology

Course Share Sets page (CRSE_SHARE_SET)

Specifically, academic requirement 1133 restricts psychology sharing to one course.

Requirement Parameters Line Item Line Item Parameters Line Item Detail

View All 1 of 1 + -

Academic Requirement: 000001133

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

***Description:** Restrict Psych

***Short Description:** Psych ***Usage:** Rq Course Share Restrictn

***Long Description:** Restrict Psych sharing to one course

***Academic Institution:** PSUNV PeopleSoft University

Academic Career: UGRD 🔍 Undergraduate

Academic Program: 🔍

Academic Plan: 🔍

Academic Sub-Plan: 🔍

Pre-Condition: None

Requirement page (ADVIS_REQUIREMENT)

There is one requirement line contained in this requirement. Requirement course share restriction usage can use only one line type: *Unit, Course or GPA Limit*.

The screenshot shows the 'Line Item' tab of the 'Requirement' page. The top navigation bar includes 'Requirement', 'Parameters', 'Line Item', 'Line Item Parameters', and 'Line Item Detail'. The 'Line Item' tab is active, displaying a 'View All' button and a '1 of 1' indicator. The main content area shows the following details:

- Academic Requirement:** 000001133
- Description:** Restrict Psych
- Effective Date:** 01/01/1900
- Status:** Active

Below this, the 'Line Item' section is displayed with a 'View All' button and a '1 of 1' indicator. It includes a 'Refresh Parentheses' button and a 'Line: 0010' field. The line item parameters are as follows:

- *Line Type:** Unit, Course or GPA Limit
- Institution:** PSUNV
- *Description:** restrict
- *Short Description:** restrict
- *Long Description:** restrict
- Pre-Condition:** None

Line Item page (ADVIS_RQRMNT_LINE)

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 no courses can be shared. You must enter a value in both fields if you want to restrict sharing to a certain number of units/courses.

The screenshot shows the 'Line Item Parameters' tab of the 'Requirement' page. The top navigation bar includes 'Requirement', 'Parameters', 'Line Item', 'Line Item Parameters', and 'Line Item Detail'. The 'Line Item Parameters' tab is active, displaying a 'View All' button and a '1 of 1' indicator. The main content area shows the following details:

- Academic Requirement:** 000001133
- Description:** Restrict Psych
- Effective Date:** 01/01/1900
- Status:** Active

Below this, the 'Line Item Parameters' section is displayed with a 'View All' button and a '1 of 1' indicator. It includes a 'Line Nbr: 0010' field and a 'Line Name: restrict' field. The parameters are as follows:

- Minimum GPA:** (blank)
- Maximum GPA Allowed:** (blank)
- Maximum Units Allowed:** 3.00
- Maximum Courses Allowed:** 1.00
- *Course Ranking Scheme:** Chronological
- *Reporting:** Always Report
- ☐ **Override Standard Set Logic**

A 'Background Key' section is also present, showing the following details:

- Line Nbr:** 0010
- Line Name:** restrict
- ☐ **Count Attempts**
- Print Control:** Print on audit reports

Line Item Parameters page (ADVIS_RQ_LINE_PARM)

The line item detail should contain the type of courses to be limited. In this example, the limit is on all psychology courses which then must be intersected by the derived course list of used by requirement group (or used by requirement) to create the limit target.

The screenshot displays the 'Line Item Detail' page for an academic requirement. The top navigation bar includes tabs for Requirement, Parameters, Line Item, Line Item Parameters, and Line Item Detail. The main header shows 'Academic Requirement: 000001133', 'Description: Restrict Psych', 'Effective Date: 01/01/1900', and 'Status: Active'. Below this, the 'Line Item' section shows 'Line Nbr: 0010' and 'Descr: restrict'. The 'Line Item Detail' section contains three entries:

*Line Detail Sequence	*Line Detail Type	Description
1	CLST (Course List)	Course List
Course List: 000000069 (All Psych Courses)		
2	DLST (Derived Course List)	Derived Course List
List Include Mode: Intersection		
List Recall Mode: Used by Requirement Group		
<input checked="" type="checkbox"/> Ignore Missing Target		
Requirement Group: 000115 (LAU GE Distribution)		
3	DLST (Derived Course List)	Derived Course List
List Include Mode: Intersection		
List Recall Mode: Used by Requirement Group		
<input checked="" type="checkbox"/> Ignore Missing Target		
Requirement Group: 000116 (Psychology Requirements)		

Line Item Detail page (ADVIS_RQ_LN_DETAIL)

Note. Requirements with a usage value of *Requirement Course Share Restriction* must intersect with the target requirements. For example, if a share set has three requirement groups but only two are restricted in sharing, the requirement that restricts needs two additional detail lines: Used by Requirement 1234 and Used by Requirement 3456 plus a third detail line of the courses that are being restricted.

CHAPTER 8

Using Advisement Overrides and Course Substitutions

This chapter provides an overview of advisement overrides and course substitutions, lists prerequisites, and discusses how to:

- Set up course directives and advisement overrides.
- Define course substitutions.

Understanding Advisement Overrides and Course Substitutions

Use advisement overrides and course substitutions to modify existing requirements and make exceptions for a specific student.

Advisement overrides enable you to override any part of a student's degree requirements. Standard requirements can be overridden or an entire program can be configured for a specific student or group of students. Course directives are a type of advisement override. These mandate (or direct) where specific courses will or will not be used to satisfy requirements. (For example, you can direct that a course be used toward satisfying a student's major requirements, not general education requirements.) Course directives are a method of course override.

Course substitution enables you to select a course to use in place of the required course. Substitutions can be set up in advance or after course completion. (For example, transfer work in the Summer session can be preapproved so it is automatically calculated in the Fall session.)

There are three ways to make academic advisement exceptions for a student:

- Direct where specific courses will or will not be used to satisfy requirements using the Authorize Student Exceptions page. (This is the preferred way to create a course substitution.)
- Change/override/waive a requirement using the Authorize Student Exceptions page.
- Substitute one course for a required course on the Course Substitution page.

Prerequisites

Before you begin, you must set up the following items:

- Academic course lists.

- Academic requirements.
- Academic requirement groups.

See Also

[Chapter 3, “Setting Up Academic Course Lists,” page 19](#)

[Chapter 4, “Setting Up Academic Requirements,” page 29](#)

[Chapter 5, “Setting Up Academic Requirement Groups,” page 81](#)

Setting Up Course Directives and Advisement Overrides

This section provides an overview of course directives and advisement overrides, and discusses how to:

- Create advisement overrides on the Authorize Student Exceptions page.
- Create override details on the From page.
- Create override details on the To page.

Understanding Course Directive and Advisement Override Setup

Use the Authorize Student Exceptions component to create an advisement override. An advisement override can act to direct a course, change a requirement, override a requirement, or waive a requirement. An established override enables you to override a course, a requirement, a requirement line, or a requirement group. Once an override is established, it is always available for editing or revising.

When any course directives or override exceptions are entered into the database, the user’s ID is recorded for security and traceability reasons. (This audit trail is printed as part of the degree audit report.)

Pages Used to Set Up Course Directives and Overrides

Page Name	Object Name	Navigation	Usage
Authorize Student Exceptions	AA_OVERRIDE	Manage Student Records, Define Academic Requirements, Use, Authorize Student Exceptions, Override	Create an advisement override.
From	AA_RQRMNT_GRP_INFO	Click the Create Exception link on the Authorize Student Exceptions page.	Record the specifics of an advisement override.
To	AA_OVRD_RQ_GRP_I	Click the Create Exception link on the Authorize Student Exceptions page.	Record the specifics of an advisement override.

Creating Advisement Overrides

Access the Authorize Student Exceptions page.

Authorize Student Exceptions

View All First 1 of 1 Last

Advisement Override: 000000015 **User ID:** Carroll,Bruce

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

***Description:** Change EnglComp Req **Short Description:** Chang Engl

Long Description: Change EnglComp Req

Override Detail

***Academic Institution:** PSUNV PeopleSoft University

***Academic Career:** UGRD Undergraduate

Academic Program: [Create Exception](#)

Academic Plan:

Academic Sub-Plan:

***Selection Code:** Student

***Selection Data:** AA0015 Miller,Barbara

***Operation Code:** Requirement Change

Level: RQ Requirement

Authorize Student Exceptions page

Note. Overridden data is used for the degree audit report only. Original data recorded in all other Student Administration pages remains unchanged.

Advisement Override	An automatically assigned sequential number that is unique for each override.
User ID	The ID of the user who created the advisement override.
Effective Date	The latest effective date for this advisement override defines whether or not the advisement override is used. If an advisement override has an effective date prior to the as-of-date value on the Request Detail page of the transcript request, then the override will be in effect. However, if the effective date is later than the as-of-date value, the override will not be in effect and will be ignored. For example, if the effective date is 01/01/2001 and the as-of-date value is 09/19/2000, the override is ignored.
Description, Short Description, and Long Description	The description and short description field values are used for documentation purposes only. The long description field value is printed on the audit report.
Academic Institution	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 mandatory.)

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 mandatory.)

Note. Academic Program, Academic Plan, and Academic Sub-Plan fields can be blank as long as the subject of the override exists at the career level or higher.

Academic Program The academic program that contains the course, requirement line, requirement, or requirement group that is the subject of the override. (A value in this field is not mandatory.)

Academic Plan The academic plan that contains the course, requirement line, requirement, or requirement group that is the subject of the override. (A value in this field is not mandatory.)

Academic Sub-Plan The academic sub-plan that is a further specialization within the academic plan that contains the course, requirement line, requirement, or requirement group that is the subject of the override. (A value in this field is not mandatory.)

Selection Code Enter the selection code that determines who or what the override affects. Choices include:

Primary Academic Plan: Indicates that the override applies to all students in the specified primary plan.

Academic Program: Indicates that the override applies to all students in the specified program.

Student Group: Indicates that the override applies to all 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*. Choices include all valid values, based on whatever Selection Code field value was entered. For example, if you choose a Selection Code of *Student Group*, then the only values available in the Selection Data field are student groups. If a Selection Code of *Student* is entered, then only the student's ID can be entered in the Selection Data field.

Operation Code Enter the operation code that indicates the type of advisement override. Choices include:

Course Directive: Indicates that the override directs where a specific course is used or not used to satisfy a requirement. (For example, a course can be directed to satisfy a major requirement, not a general education requirement.)

Requirement Change: Indicates that the override acts as a change to a specific requirement.

Requirement Override: Indicates that a specific requirement is overridden 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 Level field value choices include *LN*, *RG*, and *RQ*. If the Operation Code is *Requirement Override*, then Level field value choices include *RG* and *RQ*. *LN* indicates that the operation code works at the requirement line level. *RG* indicates that the operation code works at the requirement group level. *RQ* indicates that the operation code works at the requirement level.

Create Exception

Click this link to access the From page and To page, where you can record the specifics of an advisement override.

Creating Override Details on the From Page

Access the From page.

From page

Enter those specific items that you are overriding/changing. Based on the information entered on the Authorize Student Exceptions page, only relevant fields appear on this page. In addition, prompt values are filtered based on the information entered on the Authorize Student Exceptions page.

Note. Fields available on the From and To pages depend on information entered on the Authorize Student Exceptions page.

Creating Override Details on the To Page

Access the To page.

To page

Only relevant fields appear on this page. Prompt values are filtered based on the information entered on the Authorize Student Exceptions page and the From page. There may not be any fields on this page, depending on information entered in previous pages. In this example, enter the minimum units and minimum courses involved in this requirement change.

Example

To waive a requirement line that exists at the plan (PSYCH) level for a particular student, enter an Academic Institution of *PSUNV*, Academic Career of *UGRD*, Academic Program of *LAU*, and Academic Plan of *PSYCH*. Enter a Selection Code of *Student* and enter the student's ID (*AA0015*) in the Selection Data field. Enter an Operation Code of *Requirement Waiver*. Enter *LN* in the Level field.

Authorize Student Exceptions

View All
First
1 of 1
Last

Advisement Override: 000000016
User ID: Carroll,Bruce

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

***Description:** Waive Psych Stats
Short Description: WaiveStats

Long Description: Waive Psych Stats

Override Detail

***Academic Institution:** PSUNV PeopleSoft University

***Academic Career:** UGRD Undergraduate

Academic Program: LAU Liberal Arts Undergraduate

Academic Plan: PSYCH Psychology

Academic Sub-Plan:

***Selection Code:** Student

***Selection Data:** AA0015 Miller,Barbara

***Operation Code:** Requirement Waiver

Level: LN Rq Line

[Create Exception](#)

Authorize Student Exceptions page (AA_OVERRIDE)

Click the Create Exception link to access the From and To pages. Finish setting up the override.

From
To

Requirement Group	Academic Requirement	Line Nbr
000116 Psychology Requirements	000001089 Psych Stats Requirement	0010 Psych Stats

Authorize Student Exceptions - From page (AA_RQRMNT_GRP_INFO)

Note. Because this is a waiver, the To page is not needed. You only need to reference the waived requirement line.

Defining Course Substitutions

This section provides an overview of course substitutions, and discusses how to set up course substitutions.

Understanding Course Substitutions

Course substitution is one type of student specific exception. The page is keyed off a student's ID so each course substitution is student-specific and defined with that student in mind. Substitutions affect a student's career. Each career can contain course substitutions. A student with multiple careers can have multiple course substitutions that are relevant to a specific career.

Note. Course substitution does not apply across careers. When creating a course substitution where the original course and the substituted course are from different careers, the substitution is not effective. To make the substitution, the course must first be transferred into the target career and then substituted.

You can substitute any course for any other course whether or not it appears on a student's transcript. An advisor can substitute a course that the student completes in some future term. If the student never takes the course, the substitution is not processed.

Note that once a course has been identified as a substitute for another course, its former identity no longer exists. The course substitution process literally changes the course identity to that of a new course.

Note. When a degree audit report is run, 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.

See Also

[Chapter 11, "Processing Academic Advising Reports," Producing Quick What-If and Stored What-If Advisement Reports, page 177](#)

Page Used to Define Course Substitutions

Page Name	Object Name	Navigation	Usage
Course Substitution	STDNT_CRS_SUBS	Manage Student Records, Define Academic Requirements, Use, Course Substitution, Student Course Sub	Substitute one course for another course.

Using the Course Substitution Page

Access the Course Substitution page.

Course Substitution

Name: Adams, Kimberly **Student ID:** AA0001

Academic Career: Undergraduate **Student Career Nbr:** 0

View All ◀ 1 of 1 ▶

***Substitution Seq:** ***Course Source:**

***Long Description:**

Select Course: <input type="button" value="Search"/>	003294	Engl Lit	210	African Am Writ
Substitute for: <input type="button" value="Search"/>	003276	Engl Lit	102	Survey of American Literature

Course Substitution page

Academic Career	Indicates the student's academic career.
Student Career Number	This is a sequentially assigned number indicating each specific career of the student. The value populates automatically from the Student Program page. This number indicates which career is affected by the substitution.
Substitution Seq (substitution sequence)	This number tracks this course substitution. The number is a sequential number that is automatically assigned by the system but can be overridden by the user. (It is recommended that the user not override this number.) Each substitution sequence number reflects one course substitution. A student can have multiple course substitutions.
Course Source	<p>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. Your choices are the following:</p> <p><i>Course Offerings:</i> Includes all courses. There are no career or enrollment restrictions on what courses are available.</p> <p><i>Enrollment:</i> Includes courses that the student actually enrolled in. There is no career restriction on what courses are available. This field is used for prompting, not analysis.</p> <p><i>Other Credit, Test Credit, or Transfer Courses:</i> Includes credit and courses that the student received from other sources than course offerings and enrollment. These values prompt only on courses in the academic career. This field is used for prompting, not analysis.</p> <p>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.</p>
Long Description	Long description of the course substitution.

Select Course and Search	The substitute course. Click the search button to select from a list of available courses. The system bases the list on your course source setting. If you have selected any course source other than course offerings, the system lists courses or credit work that the student has on record.
Substitute for and Search	The course for which you are assigning a substitute course. Click the search button to select from a list of available courses.

CHAPTER 9

Creating and Using Expanded Conditions and Custom Conditions

This chapter provides overviews of both expanded conditions and custom conditions, and discusses how to:

- Define and manage expanded conditions.
- Define and manage custom conditions.

Defining Expanded Conditions

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

- Create entity groups.
- Create dynamic conditions.

Understanding Expanded Conditions

Expanded conditions consist of entity groups and dynamic conditions. Entity groups and dynamic conditions can be used as pre-conditions or condition requirements.

An academic entity group is defined as similar items grouped together for more efficient use as a single condition. For example, an entity group might include all programs within a career or multiple plans within a program.

Here's how to create entity groups:

1. Enter the effective date, institution, description, and entity group type information for the new academic entity group in the Entity Group page.
2. In addition, use the page to establish the details of individual entity group items that comprise the academic entity group.

Here's how to create dynamic conditions:

1. Use the Condition Line page to create a condition specification. The description, connector type, and condition lines within the condition specification are established on this page.
2. Create parameters for the condition specification on the Condition Parameters page.
3. Use the Condition Controls page to record milestones.

Pages Used to Manage Expanded Conditions

Page Name	Object Name	Navigation	Usage
Entity Group	AA_IN_CONDITION1	Manage Student Records, Define Academic Requirements, Setup, Define an Entity Group, Entity Group	Establish the institution, description, and entity group type information for a new academic entity group. Once an entity group is created, it can be used as a pre-condition or condition requirement.
Condition Line	RQ_CONDITION	Manage Student Records, Define Academic Requirements, Setup, Define Dynamic Condition, Condition Line	Create a condition specification.
Condition Parameters	RQ_CONDITION_PARM	Manage Student Records, Define Academic Requirements, Setup, Define Dynamic Condition, Condition Parameters	Establish condition parameters.
Condition Controls	RQ_CONDITION_CTRL	Manage Student Records, Define Academic Requirements, Setup, Define Dynamic Condition, Condition Controls	Stipulate condition controls.

Defining Academic Entity Groups

Access the Entity Group page.

Entity Group

View All First 1 of 1 Last

Academic Entity Group: 000009

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

***Status:** Active

***Academic Institution:** PSUNV PeopleSoft University

***Description:** Fine Arts Majors **Short Description:** Fine Arts

Long Description: Fine Arts Majors

***Entity Group Type:** Plan

Entity Group Item Detail First 1-4 of 4 Last

	Academic Plan	Description		
1	ART	Art (BFA)	+	-
2	ARTHIST	Art History (BFA)	+	-
3	DANCE	Dance (BFA)	+	-
4	MUS-BA	Music-BA	+	-

Entity Group page

Academic Entity Group

This arbitrary number is unique for each entity group. This academic entity group can be used as a pre-condition or condition requirement.

Effective Date

The latest effective date entered for the entity group is used during analysis.

Academic Institution

Enter 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 are establishing. The description appears on the audit report.

Short Description and Long Description

Enter descriptions for the entity group that you are establishing. These descriptions are used for documentation purposes only.

Entity Group Type

Enter 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.

Plan: Indicates that the entity group contains academic plans.

Program: Indicates that the entity group contains academic programs. This is the default field value.

Student Group: Indicates that the entity group contains student groups.

Sub Plan: Indicates that the entity group contains academic sub-plans.

Entity Group Item Detail This group box lists the details contained in this academic entity group. An entity group item number is a sequential line number that is automatically assigned to each item in the entity group. The user can override the number.

Description The description is automatically supplied.

Defining Dynamic Conditions

Access the Condition Line page.

Condition Line Condition Parameters Condition Controls

View All 1 of 1

Condition Specification: 000003

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

*Description: Certified Sr. Fine Arts Major Short Description: Certified

Long Description: Senior Fine Arts major who has successfully passed either an audition (dance and music) or a portfolio (art).

Connector Type: AND *Institution: PSUNV

Condition View All 1 of 3

*Condition Line Sequence: 1

*Condition Process Type: Standard Condition

Academic Plan In 000009 Fine Arts Majors

Condition Line page

A condition specification is a condition that includes connector types, lines, process types, parameters, and controls. Once a condition specification is created, it may be referenced as a pre-condition or condition requirement by academic/enrollment requirements and academic/enrollment requirement groups. It may also be referenced by another dynamic condition. (For example, you could create two dynamic conditions and then point to these from a third dynamic condition. Dynamic condition #1 equals level = freshman and cum GPA ≥ 2.0 . Dynamic condition #2 equals sophomore and cum GPA ≥ 2.5 . Dynamic condition #3 equals table entry = dynamic condition #1 OR table entry = dynamic condition #2.)

Condition specifications can be used as multi-dimensional pre-condition values. (For example, plan = psych AND cumulative GPA > 3.0 .) Condition specifications can also be used as multi-dimensional condition lines for a requirement. (For example, to satisfy a requirement, the condition line is student group = honors OR cumulative GPA > 3.0 .) Using Boolean logic, dynamic conditions can be combined within entity groups to create complex expanded conditions. For example, dynamic condition #1 equals student group = athlete AND level = freshman. Dynamic condition #2 equals student group = international AND level = sophomore. You can combine the two dynamic conditions into entity group #1, which equals a table entry of dynamic condition #1 OR table entry of dynamic condition #2.

Condition Specification	This is an arbitrary number that is unique for each condition specification. This condition specification can be used as a pre-condition or condition requirement.
Effective Date	The latest effective date entered for the condition specification is used during analysis.
Description	Enter a description for the condition specification that you are establishing. The description appears on the audit report.
Short Description and Long Description	Enter descriptions for the condition specification that you are establishing. These descriptions are used for documentation purposes only.
Connector Type	Select the main connector type for this condition specification. Choices include <i>None</i> , <i>AND</i> , and <i>OR</i> . (<i>None</i> converts to <i>AND</i> .) The connector type indicates the Boolean operator to be used in the equation that contains the condition lines.
Institution	Enter the academic institution. Each condition specification is associated with only one academic institution. (This field is used for prompting, not analysis.)
Condition Line Sequence	This number indicates the order in which the condition lines are evaluated. The condition line sequence number is automatically assigned, but can be overridden by the user.
Condition Process Type	<p>Select from the following the condition process types:</p> <p><i>Standard Condition:</i> Indicates that the condition is one of the delivered, standard conditions. This is the default field value. If <i>Standard Condition</i> is entered, three additional fields become available to complete the condition line statement. The first field contains the standard condition code. Enter the appropriate field value. Then enter an operator. (Operators include <i>< or =</i>, <i>> or =</i>, <i>Equal</i>, <i>Greater</i>, <i>In</i>, <i>Less</i>, <i>Not Equal</i>, and <i>Not In</i>. Operators are not used if the standard condition is <i>Table Entry</i>.) Finally, enter the final field value to complete the statement. For example, the condition line might be <i>Academic Plan Equals Art History (MA)</i>. If the condition is <i>Table Entry</i>, then select an existing condition specification number. Delivered translate values for the standard condition field are listed below.</p> <p><i>None:</i> Indicates no field value.</p> <p><i>Academic Level:</i> Indicates the year of study. (For example, valid values include freshman and sophomore.) This value is evaluated against the student based on whatever As of Date is specified at run time.</p> <p><i>Academic Plan:</i> Indicates the area of study (for example, major or minor) within the academic program. Some plans are subdivided into sub-plans. <i>Academic Plan</i> and <i>Primary Academic Plan</i> reference the exact same plan when the student has only one plan.</p> <p><i>Academic Plans:</i> Indicates that all of a student's plans are part of the equation.</p> <p><i>Academic Program:</i> Indicates the program of study to which a student applies and is admitted. <i>Academic Program</i> and <i>Primary Academic Program</i> reference the exact same program when the student has only one program.</p>

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. Valid values are defined on the Academic Standing table.) This value is evaluated against the student based on whatever *As of Date* is specified 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 student's term history cumulative statistics, in conjunction with the processing as of date).

Primary Academic Plan: Indicates a student's primary academic plan. The primary academic plan 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.)

Important! The primary academic plan is the plan designated by the lowest plan sequence number on the Student Plan page, and primary academic program is the program 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 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.

See *PeopleSoft 8 SPI Student Records PeopleBook*, "Performing Batch Term Activation," Understanding Term Activation.

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, the primary career is designated as Student Career Nbr 0.)

Student Group: Indicates a grouping of students. (For example, values might include athlete and veteran.) Valid values are defined on the Student Group table.

Student Groups: Indicates that all student groups containing a student are part of the equation.

Table Entry: Indicates a dynamic condition that has been previously created in the Define Dynamic Condition component.

User Programmable Condition: Indicates that the condition is a user programmable condition. If *User Programmable Condition* is entered, the Condition Process Identifier field becomes available. Enter the appropriate value that is a unique, arbitrary number for the condition process. There are three delivered field values: 0001 (*Milestone Check*), 0002 (*Internal Degree Check*), and 0003 (*External Degree Check*). *Milestone Check* indicates a check to see if a milestone is completed, in progress, or not completed. (The required status of the milestone is recorded on the Condition Controls page.) *Internal Degree Check* indicates a check to see if a student has received a degree (for example, a BA) from the home institution. *External Degree Check* indicates a check to see if a student has received a degree (for example, a BS) from another institution.

Note. Additional condition process identifier field values can be created on the Condition Processes table. Delivered field values are numbered from 1 through 500. Client-added values should be numbered above 500.

Example

Condition Specification 000004 has multiple condition lines.

Condition Line
Condition Parameters
Condition Controls

View All 1 of 1

Condition Specification: 000004

+

-

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

at

***Status:** Active

***Description:** Passed Portfolio/Audition
Short Description: Port/Aud

Long Description: Completed either a portfolio or an audition.

Connector Type: OR
***Institution:** PSUNV

Condition
View 1
1-2 of 2

***Condition Line Sequence:** 1

+

-

***Condition Process Type:** User Programmable Condition

Condition Process Identifier: 0001

🔍

 Milestone Check

***Condition Line Sequence:** 2

+

-

***Condition Process Type:** Standard Condition

Table entry

000002

🔍

 Writing Portfolio

Using the Condition Line page for multiple conditions (RQ_CONDITION)

Establishing Condition Parameters

Access the Condition Parameters page.

Condition Parameters page

Condition parameters are only valid if the Condition Process Type on the Condition Line page is *User Programmable Condition*. If the Condition Process Type is *Standard Condition*, then the Condition Parameters page is not activated.

When the Condition Process Type on the Condition Line page is User Programmable Condition, parameters or filters for the condition lines are established on the Condition Parameters page.

Condition Specification An arbitrary number that is unique for each condition specification. This condition specification can be used as a pre-condition or condition requirement.

Effective Date Automatically populates from the Condition Line page.

Condition Line Sequence Automatically populates from the Condition Line page.

Condition Process Identifier Automatically populates from the Condition Line page. The condition process identifier that appear on this page serves the following function:

Milestone Check: Indicates a check to see if a milestone is completed, in progress, or not completed. (The required status of the milestone is recorded on the Condition Controls page.)

Important! The *Milestone Check* condition process identifier uses the academic structure as a filter when a milestone is attached to a template. The fields denoting the academic structure (institution, career, program, and plan) are used to narrow the possible values for each milestone. The milestone that you selected on the Condition Controls page must be defined in a Milestone Template with the same academic structure as that specified on the Condition Parameters page. If a milestone is not attached to a template, define only the academic institution on the Condition Parameters page.

Internal Degree Check: Indicates a check to see if a student has received a degree (for example, a BA) from the home institution.

External Degree Check: Indicates a check to see if a student has received a degree (for example, an AA) from another institution. External degrees are recorded within the Education component.

Note. The fields that are available on this page depend on the condition process identifier that is recorded on the Condition Line page.

Condition Line Detail Sequence	Indicates the order in which the condition line details are evaluated. This number is automatically assigned, but can be overridden by the user.
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, select the academic program that is associated with this condition line detail.
Academic Plan	If applicable, select the academic plan that is associated with this condition line detail.
Degree	Enter the degree that must be obtained to satisfy the condition line.

Specifying Condition Controls

Access the Condition Controls page.

Condition Controls page

Condition controls are only valid if the Condition Process Type on the Condition Line page is *User Programmable Condition*. If the Condition Process Type is *Standard Condition*, then the Condition Controls page is not activated.

When the Condition Process Type on the Condition Line page is *User Programmable Condition*, additional controls on the condition lines are established on the Condition Controls page. You can record milestone information as well as the required minimum grade points.

Condition Specification	An arbitrary number that is unique for each condition specification. This condition specification can be used as a pre-condition or condition requirement.
Effective Date	Automatically populates from the Condition Line page.
Institution	If applicable, automatically populates from the Condition Line page.
Condition Line Sequence	Automatically populates from the Condition Line page.
Condition Line Detail Sequence	Automatically populates from the Condition Parameters page.

Note. The fields that are available on this page depend on the condition process identifier that is recorded on the Condition Line page.

Milestone	Enter the milestone that must be achieved to satisfy this condition line detail. (For example, a milestone could be an audition, qualifying exam, or thesis.) Milestones are established on the Milestone table.
Milestone Complete	<p>Select the appropriate milestone complete value from the following field values:</p> <p><i>None:</i> Indicates that the field is not applicable.</p> <p><i>Completed:</i> Indicates that the student must complete this milestone to satisfy the condition line detail.</p> <p><i>In Progress:</i> Indicates that the student must be working towards completing the milestone to satisfy the condition line detail.</p> <p><i>Not Completed:</i> Indicates that the student must not have completed this milestone to satisfy the condition line detail.</p>
Milestone Level	Enter the minimum level for this milestone. For example, a milestone level might be honors, undergraduate, or graduate.
Minimum Grade Points	Enter the minimum grade points that are acceptable to complete this condition line detail.
Milestone Title	Enter a descriptive phrase as the milestone title. This field does not appear on the audit report. It is used for documentation purposes only.

Defining Custom Conditions

This section provides an overview of custom conditions, and discusses how to establish custom conditions.

Understanding Custom Conditions

A condition table provides a solid structure for condition expansion, including condition processes. Custom conditions can be created by each institution, as needed. These conditions can be based on demographic data and existing student record data as well as such criteria as eligibility to enroll, completion of a specific test, or some unique combination of conditions required for enrollment in a specific course.

Because only certain conditions (like GPA, student group, academic plan, academic program, milestone, and external/internal degree) are delivered with PeopleSoft Academic Advisement, additional conditions can be created as needed.

Every institution can create unique conditions to meet specific needs. For example, a custom condition might be needed 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 program to set up customized processes using this table. A new Cobol program must be written. The person who writes the program should be experienced in how Cobol is handled in PeopleSoft software. Parameters entering the custom program should be passed in using the copybook SRCUCOND. (The bind/select variables in the stored statements must also match, otherwise the program stops executing, usually with a remote call error.) The only values to be passed to the custom program are the 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. Below 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 any other values are needed, those values need to be linked into the custom program as an external copybook. The following is the code from the custom program SRPCU001.cbl that shows how the ID was passed into the custom program.

```

01  CADAEE      EXTERNAL.    COPY SRCCADAEE.

LINKAGE SECTION

01  SQLRT.      COPY PTCSQLRT.

01  CUSR1.      COPY SRCUCOND.

PROCEDURE DIVISION USING  SQLRT

                        CUSR1.

```

Depending on what condition 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. Copying external arrays other than SRCCACDD into working storage is not recommended because other parameters may be modified in future releases. However, information in array SRCCACDD will be supported in future releases.

Here’s how to create custom conditions:

- 1. With the assistance of a developer, create a customized process.
- 2. Create a new condition process identifier using the Condition Processes page. Enter the effective date, status, descriptions, logical process type, logical name, process key format, and requirement key count (if appropriate) for the condition process identifier.
- 3. Use this condition process identifier as a user programmable condition on the Condition Line page. Create condition lines within the condition specification.

Page Used to Establish Custom Conditions

Page Name	Object Name	Navigation	Usage
Condition Processes	CONDITION_PROC_TBL	Manage Student Records, Define Academic Requirements, Setup, Condition Processes, Condition Process Table	Establish custom condition processes.

Creating Custom Condition Processes

Access the Condition Processes page.

Condition Processes

View All 1 of 1

Condition Process Identifier: 0001

*Effective Date: 01/01/1900

*Status: Active

*Description: Milestone Check Short Desc: Milestone

*Logical Process Type: Cobol Process

*Logical Name: SRPCUSR1

*Process Key Format: TYP2 Milestone Key

☐ Ignore Key Count

Required Key Count:

Condition Processes page

To create a custom condition, a new condition process identifier is established that is then used to create a new condition specification. Once a condition specification is created, it may be referenced as a pre-condition or condition requirement by academic/enrollment requirements and academic/enrollment requirement groups. It may also be referenced by another dynamic condition. (For example, you could create two dynamic conditions and then point to these from a third dynamic condition. Dynamic condition #1 equals level = freshman and cum GPA ≥ 2.0 . Dynamic condition #2 equals sophomore and cum GPA ≥ 2.5 . Dynamic condition #3 equals table entry = dynamic condition #1 OR table entry = dynamic condition #2.)

Condition Process Identifier	An arbitrary number that is unique for each condition process identifier. This condition process identifier can be used as a pre-condition or condition requirement.
-------------------------------------	--

Note. Three condition process identifiers are delivered with the system. These are 0001 Milestone Check, 0002 Internal Degree Check, and 0003 External Degree Check.

Effective Date	The latest effective date entered for the condition process identifier is used during analysis.
Description and Short Description	Enter descriptions for the condition process identifier that you are establishing. None of these values appears on the audit reports. These fields are used for documentation purposes only.
Logical Process Type	Indicate what process is used. Currently, the only field value available is <i>Cobol Process</i> .
Logical Name	Enter the logical name of the program that is called for this specific condition process identifier.
Process Key Format	Select the process key format that controls what fields are available on the Condition Parameters and Condition Controls pages. In addition, this field value also determines which logical name is called. Choices include <i>TYP1 Program Key</i> , <i>TYP2 Milestone Key</i> , <i>TYP3 Internal Degree</i> , and <i>TYP4 External Degree</i> . (The default value is <i>TYP1 Program Key</i> .)

TYP1 Program Key provides the keys (values) needed to run the program. *TYP2 Milestone Key* provides the keys (values) needed to define/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 this check box if the number of key values (or rows) on the Condition Parameters page is irrelevant. The Required Key Count field becomes unavailable for edit. Clear this check box to make available the Required Key Count field, where you specify how many key values must be entered on the Condition Parameters page.

Required Key Count

Enter the number of key values (or rows) that must be entered on the Condition parameters page. If you do not enter a key count value, then no entries are permitted on the Condition Parameters page. For example, if the required key count is 4, then there must be four rows on the corresponding Condition Parameters page.

Example

Use the delivered condition process identifier *0001* (milestone check) to require a milestone as defined in the Define Dynamic Condition component.

The screenshot shows the 'Condition Processes' page with a blue header bar. In the top right corner of the header, there is a 'View All' link and a pagination indicator '1 of 1'. Below the header, the form contains the following fields:

- Condition Process Identifier:** 0001
- *Effective Date:** 01/01/1900 (with a calendar icon)
- *Status:** Active (dropdown menu)
- *Description:** Milestone Check
- Short Desc:** Milestone
- *Logical Process Type:** Cobol Process (dropdown menu)
- *Logical Name:** SRPCUSR1
- *Process Key Format:** TYP2 (with a magnifying glass icon) Milestone Key
- ☐ **Ignore Key Count**
- Required Key Count:** (empty text box)

On the right side of the form, there are two yellow buttons: a '+' button and a '-' button.

Using the Condition Processes page when a milestone check has been defined in the Define Dynamic Condition component (CONDITION_PROC_TBL)

Use this condition process identifier as a user programmable condition on the Condition Line page.

Using the Condition Line page to reference a condition specification (RQ_CONDITION)

Condition specification 004 (containing condition process identifier 0001) can then be referenced.

Using the Condition Parameters page to compare the number of rows versus the key count of the referenced condition process (RQ_CONDITION_PARM)

The number of rows on this page must match the key count of the referenced condition process, if a key count is required.

The screenshot displays the 'Condition Controls' page with the following structure:

- Condition Line** | **Condition Parameters** | **Condition Controls**
- Condition Specification:** 000004 **Effective Date:** 01/01/1900
- Condition Line Sequence:** 1
- Condition Line Detail Sequence:** 1
- Milestone:** AUDITION (with search icon) Audition
- Milestone Complete:** Completed (dropdown) Completed
- Milestone Level:** DANCE (with search icon) Dance Audition
- Minimum Grade Points:** [Empty field]
- Milestone Title:** Audition

Reviewing specific condition data on the Condition Controls page (RQ_CONDITION_CTRL)

Specific condition data that references each row (or key) can be entered here.

CHAPTER 10

Maintaining Academic Advisement Setup Data

This chapter discusses the various reports that you can run periodically in order to review the advisement setup data in your system. These reports are designed to assist you with the planning and maintenance of your organization's advisement data. Specifically, this chapter discusses how to:

- Produce an Advisement Group Summary report.
- Produce a Database Tables report.
- Produce Entity Group Table and Condition Table reports.
- Produce a Requirement Advisement report.
- Produce a Reverse Engineering report.

Prerequisite

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

See Also

[Chapter 3, "Setting Up Academic Course Lists," page 19](#)

[Chapter 4, "Setting Up Academic Requirements," page 29](#)

[Chapter 5, "Setting Up Academic Requirement Groups," page 81](#)

[Chapter 9, "Creating and Using Expanded Conditions and Custom Conditions," page 133](#)

Producing an Advisement Group Summary Report

This section provides an overview of the Advisement Group Summary report, and discusses how to create 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 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, if you need a printout of all the academic requirement groups that are defined for an undergraduate psychology major, you can run this report.

While preparing to print this report, you can request that the requirements, lines, and courses be summarized in generalized terms or in specific detail. The parameters that you define for the requirement advisement report appear on the report.

Here's how to create an advisement group summary report:

1. Select the academic requirement group or enter other general parameters on the Advisement Groups Summary Report page. In addition, enter the description and detail options available through the Print Options link.
2. Click the Run button to process the report.

Pages Used to Produce an Advisement Group Summary Report



Page Name	Object Name	Navigation	Usage
Advisement Group Summary Report	RUNCTL_SRGRPADV	Manage Student Records, Define Academic Requirements, Report, Advisement Group Summary, Advisement Group	Request a report detailing all the requirements contained in a specific requirement group or all requirement groups that meet the criteria established in this page.
Print Options	PRINT_OPTIONS_SEC	Click the Print Options link on the Advisement Group Summary Report page.	Select summary report preferences.


Generating an Advisement Group Summary Report


Access the Advisement Group Summary Report page.

Advisement Group Summary Report


Run Control ID: PSDF [Report Manager](#) [Process Monitor](#) Run

*As of Date:  Requirement Group: 


Academic Institution:  PeopleSoft University

Academic Career:  Undergraduate

Academic Program:  Liberal Arts Undergraduate

Academic Plan:  Psychology

Academic Sub-Plan: 

Requirement Usage: 

Honor Blank Values: ☐

[Print Options](#)

Advisement Group Summary Report page

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.

While preparing to print this report, you can request that the groups, requirements, lines, and courses be summarized in generalized terms or in specific detail. The parameters that you define for the summary report appear on the report.

Run Control ID	Identifies the report request. (You can use any alphanumeric combination.)
As of Date	The advisement group summary report will accurately reflect the requirements contained in the specified requirement group (or requirement groups that meet the search criteria) as of this date. (This field value automatically populates to the current date, but it can be modified. A value in this field is mandatory.)
Requirement Group	<p>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.</p> <p>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/or requirement usage are automatically contained within the specified requirement group. If you do not enter a requirement group number, then these fields remain on the page and are used to identify the requirement groups that satisfy the search criteria.</p>

Academic Institution	Enter the academic institution. Each requirement group is associated with only one academic institution. (A value in this field is mandatory.)
	<hr/> <p>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.) Since fields are analyzed in a hierarchical order, appropriate field values are system-supplied. For example, if you enter an Academic Program, the appropriate Academic Career field value is automatically supplied by the system. If any of these fields are left blank, the report will contain <i>all</i> careers, programs, plans, and sub-plans that satisfy the search criteria.</p> <hr/>
Academic Career	Enter the academic career that is affected by the requirement groups.
Academic Program	Select 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	Select the Academic Sub-Plan that is a further specialization within the academic plan.
Requirement Usage	Indicates how the requirement groups are used in the academic advisement process. Choices include <i>None</i> , <i>Academic Advisement</i> , and <i>Student Individualized Plan</i> . (The default value is <i>None</i> .) If <i>None</i> is used, the field is not used as a limiting parameter. If <i>Academic Advisement</i> is used, requirement groups with a usage of academic advisement are contained in the report. If <i>Student Individualized Plan</i> is used, 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 in any way. Any modifications to these values will require a substantial programming effort.
Honor Blank Values	<p>Select if blank fields on this page represent actual values. (The default is clear.) For example, if 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 not selected, the blank field acts as a wildcard and every requirement group with an academic program in the specified career will be contained in the report.</p> <hr/> <p>Note. The Honor Blank Values check box does not affect the Requirement Usage field.</p> <hr/>
Print Options	Click to access the print options.

Defining Advisement Group Summary Print Options

Access the Advisement Group Summary – Print Options page.

Advisement Group Summary

Print Options

Description Options

Print Course Level:

Standard ▼

Print Group Level:

Standard ▼

Print Line Level:

Standard ▼

Print Requirement Level:

Standard ▼

Detail Options

☐

Print Group Level

☐

Print Line Level

☐

Print Requirement Level

Course List Detail Level:

List and Courses ▼

[Return](#)

Advisement Group Summary — Print Options page

Description Options

Description options enable you to control how descriptions are presented in the summary report.

Print Course Level

Enter the print course level that governs the type of course description that is contained in the report. Choices include *None*, *All*, *Long*, and *Standard*. (The default value is *Standard*.) *None* indicates that a description is not printed in the report. *All* indicates that the standard, short, and long descriptions on the Course List Description page are printed in the report. *Long* indicates that the long description on the Course List Description page is printed in the report. *Standard* indicates that the description on the Course List Description page is printed in the report. 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 Group Level

Enter the print group level that governs the type of requirement group description that is contained in the report. Choices include *None*, *All*, *Catalog*, *Excp Cat*, *Long*, and *Standard*. (The default value is *Standard*.) *None* indicates that a description is not printed in the report. *All* indicates that the standard, short, and long descriptions on the Requirement Group page plus the catalog description are printed in the report. *Catalog* indicates that the description on the Requirement Group page is printed in the report. *Excp Cat* indicates that the standard, short, and long descriptions on the Requirement Group page are printed in the report. *Long* indicates that the long description on the Requirement Group page is printed in the report. *Standard* indicates that the description on the Requirement Group page is printed in the report. 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 Line Level

Enter the print line level that governs the type of line description that is contained in the report. Choices include *None*, *All*, *Long*, and *Standard*. (The default value is *Standard*.) *None* indicates that a description is not printed in the report. *All* indicates that the standard, short, and long descriptions on the Requirement Line Item page are printed in the report. *Long* indicates that the long description on the Requirement Line Item page is printed in the report. *Standard* indicates that the description on the Requirement Line Item page is printed in the report. 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 Requirement Level

Enter the print requirement level that governs the type of requirement description that is contained in the report. Choices include *None*, *All*, *Long*, and *Standard*. (The default value is *Standard*.) *None* indicates that a description is not printed in the report. *All* indicates that the standard, short, and long descriptions on the Requirement page are printed in the report. *Long* indicates that the long description on the Requirement page is printed on the report. *Standard* indicates that the description on the Requirement page is printed in the report. 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.

Detail Options

Detail options enable you to control how details are presented in the summary report.

Print Group Level

Select to print the requirement group detail on the report. If the check box is not selected, no group detail is printed.

Print Line Level

Select to print the line detail on the report. If the check box is not selected, no line detail is printed.

Print Requirement Level

Select to print the requirement detail on the report. If the check box is not selected, no requirement detail is printed.

Course List Detail Level

Indicates how the course list detail appears in the report. Choices include *None*, *List and Courses*, *List and Courses with Detail*, *List Only*, and *List Only with Detail*. (The default value is *List and Courses*.) *None* converts to *List and Courses*. *List and Courses* indicates that the course list plus specific courses are printed in the report. *List and Courses with Detail* indicates that the course list plus specific courses with detail are printed in the report. *List Only* indicates that the course list only is printed in the report. *List Only with Detail* indicates that the course list with detail is printed in the report. 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.

Producing a Database Tables Report

Create a Database Table report in order to retrieve all 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 values (wild card).
2. Click the Run button to process the report.

Prerequisite

Before you can run the Database Tables report, you must first populate the database tables by running a transcript with a report format of Analysis Database for the student or group of students in whom you are interested.

Pages Used to Produce a Database Tables Report

Page Name	Object Name	Navigation	Usage
Database Tables Report	RUNCTL_SRDBTBLS	Manage Student Records, Define Academic Requirements, Report, Database Tables Report, Database Tables	Retrieve all 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 see the data that is available for the student. On any specific day, one standard and one special report can be run for the same student.

Entering Database Table Information

Access the Database Tables Report page.

Database Tables Report

Run Control ID: PSDF [Report Manager](#) [Process Monitor](#) Run

*As of Date: 06/06/2001

ID: AA0001

Report Type: STD Standard Report

Database Tables Report page

As of Date	The database tables report will accurately reflect 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 it can be modified. A value in this field is mandatory.)
ID	The student's ID number.
Report Type	Choices include <i>SPC</i> (special) and <i>STD</i> (standard). <i>SPC</i> indicates a special advising report using a special requirement usage. <i>STD</i> indicates a standard advising report.

Producing Entity Group Table and Condition Table Reports

Create the Entity Group Table report or the Condition Table report in order to review the various condition data that is set up for a specific institution, as of a particular date.

Here's how to produce an entity group table and condition table report:

1. Select the as of date and institution for which you want to report conditions on the Entity Group Table and Condition Table Reports page.
2. Click the Run button.
3. Select either the Condition Table Report or the Entity Group Table Report process to specify the report type.
4. Click the OK button to process the report.

Pages Used to Produce Entity Group Table and Condition Table Reports

Page Name	Object Name	Navigation	Usage
Entity Group Table and Condition Table Reports	RUNCTL_SRMISRPT	Manage Student Records, Define Academic Requirements, Report, Miscellaneous Reports, Miscellaneous Reports	<p>Process one of two academic advisement administrative reports: the entity group table report and the condition table report.</p> <p>The entity group table report lists all the entity groups for the institution as of the As of Date field value.</p> <p>The condition table report lists all the dynamic conditions for the institution as of the As of Date field value.</p>

Entering Entity Group and Condition Report Parameters

Access the Entity Group Table and Condition Table reports page.

Run Control ID	Identifies the report request. (You can use any alphanumeric combination.)
As of Date	The report will accurately reflect the retrieved information as of this date. (This field value automatically populates to the current date, but it can be modified. A value in this field is mandatory.)
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 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 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 you define for the requirement advisement report appear on the report.

Here's how to create a requirement advisement report:

1. Select the academic requirement or enter other general parameters on the Requirement Advisement page. In addition, enter the description and detail options available through the Print Options link.
2. Click the Run button to process the report.

Pages Used to Create a Requirement Advisement Report

Page Name	Object Name	Navigation	Usage
Requirement Advisement Report	RUNCTL_SRRQRADV	Manage Student Records, Define Academic Requirements, Report, Requirement Advisement, Requirement Adv	Process a report detailing a specific requirement or all requirements that meet the criteria established in this page.
Print Options	PRINT_OPTIONS_SEC2	Click the Print Options link on the Requirement Advisement Report page.	Select report preferences.

Defining the Requirement Advisement Report Parameters

Access the Requirement Advisement Report page.

Requirement Advisement Report

Run Control ID: PSDF

[Report Manager](#) [Process Monitor](#) Run

*As of Date:06/06/2001

Academic Requirement:

Academic Institution:PSUNVPeopleSoft University

Academic Career:BUSNGraduate Business

Academic Program:MBA Masters of Business Admin

Academic Plan:FINANC-MBA Finance (MBA)

Academic Sub-Plan:

☐ Honor Blank Values

[Print Options](#)

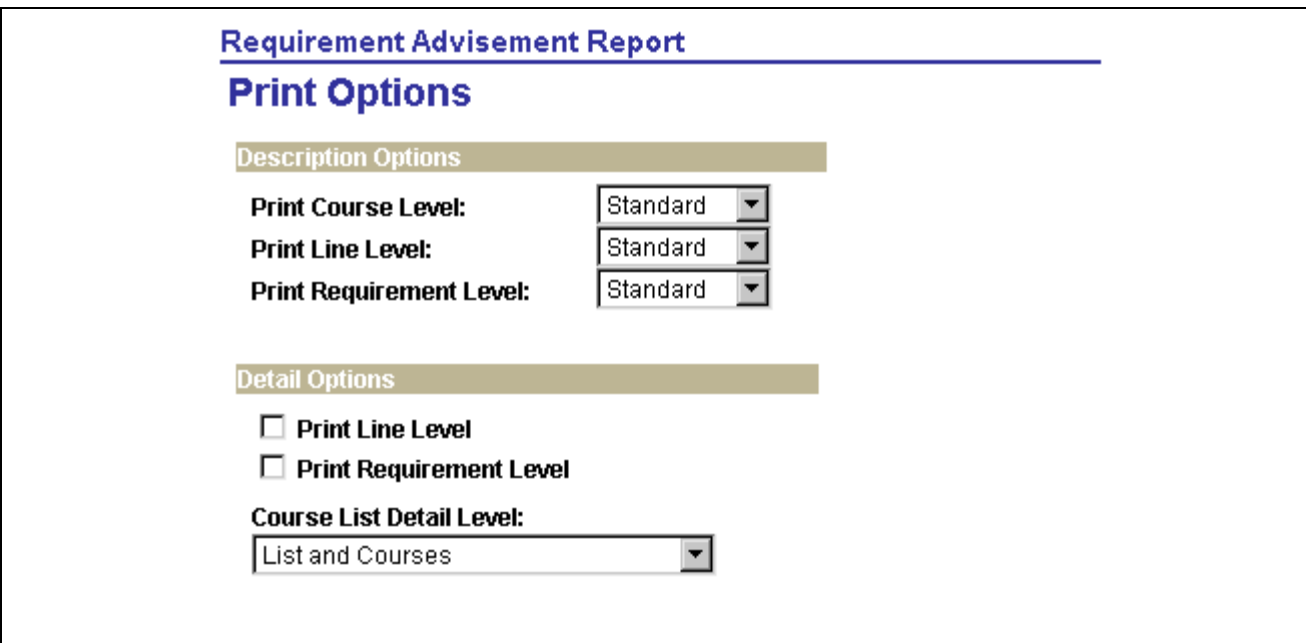
Requirement Advisement Report page

Run Control ID	Identifies the report request. (You can use any alphanumeric combination.)
As of Date	The requirement advisement report will accurately reflect the specific requirement (or requirements that meet the search criteria) as of this date. (This field value automatically populates to the current date, but it can be modified. A value in this field is mandatory.)
Academic Requirement	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 mandatory.)
<div><div>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.) Since fields are analyzed in a hierarchical order, appropriate field values are system-supplied. For example, if you enter an Academic Program, the appropriate Academic Career field value is automatically supplied by the system. If any of these fields are left blank, the report will contain <i>all</i> careers, programs, plans, and sub-plans that satisfy the search criteria.</div></div>	
Academic Career	Enter the academic career that is affected by the requirements.
Academic Program	Select 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	Select the academic sub-plan that is a further specialization within the academic plan. (A value in this field is not mandatory.)
Honor Blank Values	Select this check box if blank fields on this page represent actual values. (The default is clear.) For example, if the check box is selected and the Academic Program field is left 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 contained in the report.
Print Options	Click to access the print options.

Defining Requirement Advisement Print Options

Access the Print Options page.



Requirement Advisement Report

Print Options

Description Options

Print Course Level: Standard

Print Line Level: Standard

Print Requirement Level: Standard

Detail Options

☐ Print Line Level

☐ Print Requirement Level

Course List Detail Level: List and Courses

Print Options page

Description Options

Description Options enable you to control how descriptions are presented in the report.

Print Course Level	Governs the type of course description that is contained in the report. Choices include <i>None</i> , <i>All</i> , <i>Long</i> , and <i>Standard</i> . (The default value is <i>Standard</i> .) <i>None</i> indicates that a description is not printed in the report. <i>All</i> indicates that the standard, short, and long descriptions on the Course List Description page are printed in the report. <i>Long</i> indicates that the long description on the Course List Description page is printed in the report. <i>Standard</i> indicates that the description on the Course List Description page is printed in the report. Values for this field are delivered with your system as translate
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values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Print Line Level

Defines the type of line description that is contained in the report. Choices include *None*, *All*, *Long*, and *Standard*. (The default value is *Standard*.) *None* indicates that a description is not printed in the report. *All* indicates that the standard, short, and long descriptions on the Requirement Line Item page are printed in the report. *Long* indicates that the long description on the Requirement Line Item page is printed in the report. *Standard* indicates that the description on the Requirement Line Item page is printed in the report. 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 Requirement Level

Defines the type of requirement description that is contained in the report. Choices include *None*, *All*, *Long*, and *Standard*. (The default value is *Standard*.) *None* indicates that a description is not printed in the report. *All* indicates that the standard, short, and long descriptions on the Requirement page are printed in the report. *Long* indicates that the long description on the Requirement page is printed on the report. *Standard* indicates that the description on the Requirement page is printed in the report. 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.

Detail Options

Detail Options enable you to control how details are presented in the summary report.

Print Line Detail

Select to print the line detail on the report. If the check box is not selected, no line detail is printed.

Print Requirement Detail

Select to print the requirement detail on the report. If the check box is not selected, no requirement detail is printed.

Course List Detail Level

Enter the value that indicates how the course list detail appears in the report. Choices include *None*, *List and Courses*, *List and Courses with Detail*, *List Only*, and *List Only with Detail*. (The default value is *List and Courses*.) *None* converts to *List and Courses*. *List and Courses* indicates that the course list plus specific courses are printed in the report. *List and Courses with Detail* indicates that the course list plus specific courses with detail are printed in the report. *List Only* indicates that the course list only is printed in the report. *List Only with Detail* indicates that the course list with detail is printed in the report. 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.

Producing a Reverse Engineering Report

Use the Reverse Engineering Report page to search for a requirement, course, course list, or condition that is being used in the system. 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/or which requirement group, requirement, or requirement line contains a specific condition.

The reverse engineering reports include enrollment and academic advisement requirement groups, requirements, and course lists.

Here's how to produce a reverse engineering report:

1. Select the report type and any other general parameters on the Reverse Engineering Report page.
2. Click the Run button to process report.

Pages Used to Produce a Reverse Engineering Report

Page Name	Object Name	Navigation	Usage
Reverse Engineering Report	RUNCTL_SRREVENG	Manage Student Records, Define Academic Requirements, Report, Reverse Engineering, Reverse Engineer	Enter the parameters that will capture the data you want to review. Select a report type in order for the page to display the appropriate parameter fields.

Entering Reverse Engineering Report Parameters

Access the Reverse Engineering Report page.

Reverse Engineering Report

Run Control ID: PSDF [Report Manager](#) [Process Monitor](#)

*As of Date: *Report Type:

Course ID:

Subject Area:

Catalog Nbr:

Academic Group:

Select Course:

Reverse Engineering Report page

Run Control ID	Identifies the report request. (You can use any alphanumeric combination.)
As of Date	<p>The reverse engineering report will accurately reflect the requirements, courses, course lists, or conditions as of this date. (This field value automatically populates to the current date, but it can be modified. A value in this field is mandatory.)</p> <p>Enter the Report Type that indicates the subject of the search. Choices include Courses in Course Lists; Conditions in RG, RQ, RQLN; Course Lists in Requirements; and Requirements in REQ Group. (The default value is Courses in Course Lists.) Courses in Course Lists indicates that a course is the subject of the search. 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.</p> <hr/> <p>Note. Depending on the Report Type field value, additional fields are available on this page.</p> <hr/>

Report Type of Courses in Course Lists

If the report type is *Courses in Course Lists*, a course is the subject of the search.

Course ID, Subject Area, and Catalog Number	Enter the course ID, subject area, or catalog number plus for the course that is the basis of this search. Combinations of field values must make logical sense.
	<hr/> <p>Important! Even if all field values are known in advance, you must click the Search button in order to successfully run a report.</p> <hr/>

Search	Click to retrieve available courses. If you click this button without entering a course ID, the system retrieves courses from all valid institutions. If your database contains more than one institution that uses similar subject areas and catalog numbers, be sure and select the appropriate course by course ID rather than catalog number.
Select Class	Click the Select Class button next to the course that you want to select. This course is now listed on the Reverse Engineering Report page. The Academic Group field value is supplied.

Report Type of Conditions in RG, RQ, RQLN

If the report type is *Conditions in RG, RQ, RQLN*, a condition (or conditions) in a requirement group, requirement, or requirement line is the subject of the search.

Condition Code	Enter the condition code that indicates which field in the database will be checked by this condition. For example, <i>Academic Level</i> , <i>Academic Plan</i> , <i>Academic Program</i> , and <i>Academic Sub-Plan</i> are condition codes. <i>Academic Plan</i> and <i>Primary Academic Plan</i> reference the exact same plan when the student has only one plan. <i>Academic Program</i> and <i>Primary Academic Program</i> reference the exact same program when the student has only one
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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. *Student Groups* indicates that all student groups containing a student are part of the equation. *Table Entry* is a condition code that enables you to select one of the dynamic conditions that has been previously created in the Define Dynamic Condition component. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Note. If the Condition Code is *Table Entry*, 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 *Equal*, *None*, *< or =*, *> or =*, *Greater*, *In*, *Less*, *Not Equal*, 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 in any way. Any modifications to these values will require a substantial programming effort.

Ignore Condition Operator

Select the Ignore Condition Operator check box if the Condition Operator field should be ignored when the report is run. (The default is clear.) For example, if the check box is selected, then the Condition Operator field is unavailable and all 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 to be checked against the condition code. For example, specific academic plans and programs as well as dynamic conditions are condition data values. If the condition code is *Table Entry*, then select a previously created dynamic condition from the prompt box.

Report Type of Course Lists in Requirements

If the report type is *Course Lists in Requirements*, a course list is the subject of the search.

Enter the course list number that is the basis for this report.

Report Type of Requirements in REQ Group

If the report type is *Requirements in REQ Group*, a requirement is the subject of the search.

Enter the requirement that is the basis for this report.

CHAPTER 11

Processing Academic Advising Reports

This chapter provides an overview of online and background processing, and discusses how to:

- Process online academic advising reports, that you use to create audit reports for a small group of students.
- Process batch academic advising reports, that you use to create audit reports for a large group of students, or a single student population.
- Process stored What-if and Quick What-If reports, that you can run online or in batch.
- Process self-service advisement reports, that students and advisors can use through the PeopleSoft Learner Services and PeopleSoft Learning Management collaborative applications.

Understanding Online and Batch Advising Reports

The online advising report is associated with the Transcript Request component and is used primarily for running degree progress reports and transcripts; this is the core function of the PeopleSoft Academic Advisement application.

Batch advising reports can be run from the Batch Transcript Request page and the Transcript Generation page. After the reports are run, they can be viewed on the Report Results page. To store data in the analysis database via the batch process, enter a Transcript Type field value that references the advising process and select the Database Report check box.

Note. To improve degree audit run times, when creating large transcript/advisement report requests, limit the number of individual reports (request detail records) for online display to 10 per transcript request header. All detail report lines must be retrieved for a transcript request header, and if you have a large amount of individual requests, the system attempts to load all the data.

Prerequisites

Before you can process advising reports, you must set up advisement transcript types on the Basic Data page.

Note. On the Basic Data page where you define transcript types, the Advising Report check box must be selected in order 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 advising reports, you must designate at least one transcript type for self-service, by selecting the Allow Student Self-Service check box on the Basic Data page.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Transcripts,” Defining Transcript Types

Producing an Online Academic Advisement Transcript Report

The PeopleSoft Academic Advisement transcript report is a very important degree audit tool. You run this report in order to view a student’s process towards graduation. An entire printout of the student’s academic history can be produced as well as an advisement report that indicates whether the student has completed all requirements needed to graduate or whether the student still needs to satisfy outstanding requirements.

Note. Courses entered into the system using the Historical Course Enrollment page are not recognized by the advisement engine during the analysis process. Any historical courses that are entered into a student’s record are used for record/history tracking purposes only.

Here’s how to create an online degree progress transcript report:

1. Enter the institution, transcript type, output destination, and report format on the Request Header page.
2. Enter all necessary IDs on the Request Detail page. (Insert rows, as needed.) For each ID, supply what-if information and number of mailed copies, as required.
3. Click the Process Request button on the Request Detail page.
4. View report results on the Report Results page.
5. Check any reporting errors on the Report Errors page.

Pages Used to Create an Online Academic Advising Report

Page Name	Object Name	Navigation	Usage
Request Header	SA_REQUEST_HEADER	<ul style="list-style-type: none"> • Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Request Header • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Request Header 	Select the type of transcript and to set other general parameters of the request. Be sure to specify an advising transcript type.
Request Detail	SA_REQUEST_DETAIL	Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Request Detail	Insert a row for each student that you want to evaluate. Select the what-if advising options as necessary.
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 advising report.
Report Results	SA_REPORT_RESULTS	<ul style="list-style-type: none"> • Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Report Results • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Report Results 	View the results of your transcript request process. Depending on the transcript type, you may see a transcript only, a transcript and an audit report, or simply an audit report.
Report Errors	SA_REQ_REPORT_ERR	<ul style="list-style-type: none"> • Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Report Errors • Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Report Errors 	View any reporting errors. If the Report Results page is blank or incomplete after you click the Process Request button on the Request Detail page or the word Errors rather than Successful appears next to the Print button, check this page. All report errors are described in detail in the Message Text field.

Defining the Request Header

Access the Request Header page.

Request Header	Request Detail	Report Results	Report Errors
Report Request Nbr: 000000977 Request Date: 06/06/2001 User ID: PS			
<hr/> *Institution: <input type="text" value="PSUNV"/> PeopleSoft University *Transcript Type: <input type="text" value="ADV"/> Academic Advisement Report <input type="checkbox"/> Freeze Record <input type="checkbox"/> Override Service Indicator			
<hr/> *Output Destination: <input type="text" value="Printer"/> Number of Copies: <input type="text" value="1"/> Future Release: <input type="text" value="ImedProc"/> Academic Career: <input type="text"/> Term: <input type="text"/> Print Date: <input type="text" value="06/06/2001"/> Request Reason: <input type="text"/> <input type="checkbox"/> Cancel Request			
*Report Format <input type="text" value="Standard Report Format"/> <input type="button" value="+"/> <input type="button" value="-"/>			

Request Header page

Report Request Number	Identifies this report request.
Request Date and User ID	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	The institution to which both the transcript type data and the students you process are associated.
Transcript Type	<p>The type of transcript that you want to process. Different transcript types produce varying types of unofficial, official, or advising types of reports. Transcript type values (including academic advisement field values) are defined on the Basic Data page.</p> <p>A special usage value can also be used as an academic advisement transcript type.</p> <p>See Chapter 2, "Setting Up Optional Advisement Data," Setting Up Special Requirement Usage Values, page 14.</p>

Note. Any modified usage value can be associated with a transcript type and then entered in the Transcript Type field. Modified usage values are established on the Requirement Usage page and attached to a transcript type on the Basic Data page. These values are effective-dated and match the student's requirement term.

Freeze Record

Select to prevent this request from being purged when during a subsequent transcript purge process.

Override Service Indicator

Select to have the system ignore student-specific service indicators when you process the request. If the check box is not selected, then service indicators are evaluated.

For instance, some service indicators prevent a student from receiving a transcript.

See *PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook*, "Managing Service Indicators".

Output Destination

Select the output destination for the report. Choices include *Printer* and *Page*. (The *EDI* option is not available.) *Printer* prints the report immediately. (You can also view the report on the Report Results page.) *Page* sends the report to the Report Results page. (Click the Print button to print the report.) 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.

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 is *Printer*.

Future Release

Enter the future release value that triggers when the system processes the transcript request through a batch (background) generation process.

Choices are:

None: Indicates that there is no specific future release transcript request.

Degree: Indicates when the degree is conferred, a transcript or degree audit is produced.

Grades: Indicates when a fully graded date is reached, a transcript or degree audit is produced.

Hard 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 work has been posted before running the report.)

Trnsfr Cr: Indicates that a transcript request is produced when transfer credit is posted.

Academic Career

The academic career in which the future release is valid. (The field is available when a future release value of *Degree* or *Grades* is entered.)

Term

The term in which the future release is valid. The field is available with a future release value of *Degree* or *Grades*.

Print Date

The current date automatically populates as the print date. You can modify this value, as necessary. (The field is unavailable if a future release value of *None*, *Degree*, or *Grades* is entered.)

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. Choices include *None*, *Data Change*, *End of Term Print*, *External Request*, *Graduation*, *Student's Request*, and *Web Transcript Request*.

Cancel Request

Select to cancel the print request. (A future release value must be supplied for this check box to be available.)

Note. Use multiple Report Format rows to both print a report and write the report to the analysis database.

Report Format

Indicates the format of the report. (For this field to be available, the Advising Report check box on the Basic Data page must be selected and the transcript type must be an advisement report type or a special usage report type.) Choices include the following:

Standard Report Format (Default): Indicates that the report is printed as hardcopy or delivered to a page. (The analysis database is not refreshed when the Report Format field value is *Standard Report Format*.)

Analysis Database: Indicates that the report is written to the analysis database. The report is stored in computer-readable format so application programs can be written against the tables to create modified reports. (This is the only field value that refreshes the database tables.)

Completed Only: Indicates that the report contains only those requirements that have been wholly completed. (Normally, the degree audit report bolds incomplete requirement groups and requirements while completed requirement groups and requirements are not bold.)

Incompleted Only: Indicates that the report contains only those requirements that have not been totally completed. (This field value can help a counselor determine exactly what a student needs to satisfy to graduate.)

Note. Use a Report Format of *Analysis Database* to write the degree audit report to the analysis database for future use by other Crystal and SQR reports or COBOL programs. Data stored in these academic advisement analysis tables can be reused. The tables can be queried for data.

These tables do not automatically purge and must be updated to remain current.

See [Chapter 12, “Using the Analysis Database to Create User Configurable Reports,” Understanding the Analysis Database, page 187.](#)

Selecting Advising Transcripts for Processing

Access the Request Detail page.

Request Detail page

Note. In order to access the Quick What-If Analysis Report page, the Request Detail page 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 the report can be run again using today’s date as the request date on the Request Header page.

Seq Nbr (sequence number) The sequence number is a sequential number that is system-supplied. This number determines the order in which the individual report requests are processed. The user can override the number, if necessary.

ID Enter the ID of the student for whom the report will be run.

Note. The As of Date field is only used when running academic advisement audit reports (including special usage reports). This field can be used as a what-if date for an audit report.

As of Date The audit report will accurately reflect all relevant student data as of this date. (This field value automatically populates to 01/01/3000, but it can be modified at each run time. To set the field default to the current date, leave the Transcript Default As of Date field blank on the Installation Student Administration page.) A value in this field is mandatory. This field is used to include or exclude

future-dated programs, plans, sub-plans, conditions, and/or entity groups when running an academic advisement transcript report. When the audit report is run, all student data as of the As of Date field value is included in the audit.

Regardless of the As of Date value, all courses on a student's transcript will be used.

See *PeopleSoft 8 SPI Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, "Reviewing Your Installation Setup and System Defaults," Reviewing Incremental Numbering.

Note. You do not have to use a what-if scenario in order to run a report. In fact, a what-if scenario may not be used that often.

Under What-If Analysis, the following what-if functions are available: stored what-if, quick what-if, and course list what-if.

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. The following 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.

The Enable Stored What-If check box is used only to enable/disable the Stored What-If option. (The Quick What-if option becomes unavailable and the Stored What-If option becomes available when the Enable Stored What-If check box is selected.)

Enable Stored What-If and Stored What-If

Select to enable the Stored What-If option. Click the Stored What-If link if you want to create a new stored what-if scenario or run the degree audit report based on previously stored what-if information for the student.

See [Chapter 11, "Processing Academic Advising Reports," Understanding Quick What-If and Stored What-If Advisement Reports, page 177.](#)

Quick What-If

To enable this option, do not select the Enable Stored What-If check box. Click to run a simulated academic advisement report that compares the student's transcript against a proposed academic career, program, plan, and/or sub-plan that is input using the Quick What-If Analysis Report page.

Course List What-If

To enable this option, do not select the Enable Stored What-If check box. Click to select an existing course from the course catalog to use during a what-if analysis.

Send

If the report will be sent to a recipient, click to access the Send To Information page and enter the recipient information.

Send To Information Page

Access the Send To Information page.

Specify External Org ID (specify external organization ID)

Select to send the transcript to an external organization that is already in your database. Enter the appropriate organization number and location. If you do not select this check box, enter the address of the requester.

OK

Click to exit the page and return to the Request Detail page.

Process Request and Output Destination

Click the Process Request button on the Request Detail page when you are ready to submit the requests for processing. The degree audit report is sent to the specified output destination on the Request Header page.

Print

Click to print all the reports listed on the page. Use the Report Manager to view the Crystal report. When multiple sequence number rows are present, all the listed reports print.

Viewing and Printing Advising Report Results

Access the Report Results page.

Request Header Request Detail **Report Results** Report Errors

View All 1 of 1

Seq Nbr: 1 [Print](#)

ID: AA0022 Tam,Phillip [Report Manager](#)

Transcript and Advisement Report With Current Term

Name : Tam,Phillip

Student ID: AA0022

Print Date : 2001-06-06

PeopleSoft University

4301 Hacienda Boulevard

Pleasanton, CA 94588

United States

- - - - - **Academic Program History** - - - - -

Program : Graduate Liberal Arts Programs

1900-02-02 : Teaching-MA Major

Report Results page

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 (and/or needed) to satisfy requirements are printed in the report.

Career level requirements print under the program levels on reports. Most students have only one career and one program. However, if a student has two programs (for example, LAU and FAU), then the UGRD level requirement prints under each declared program rather than under undergraduate requirements. As a result, a single requirement may appear more than once in an audit report even though it is required only once.

Note. There is a difference between processing order and reporting order. Processing order refers to the order in which courses are processed by the audit engine. Academic structure, requirement group number, and reporting sequence number affect processing order. Reporting order refers to the order in which courses, requirements, and requirement groups are printed in the audit report.

In general, the long description of the requirement groups, requirements, and requirement lines are displayed. Under each long description of the requirement groups and requirements, the report contains information regarding GPA and units. (The column containing units lists units earned, not units taken. Refer to Calculating GPAs for a detailed description of units earned versus units taken.) If the student has not met a requirement, the heading is printed in bold. If the requirement has been met, the heading is not bolded.

When courses are printed, information concerning the term, course, course description, units, grade, and code appears in the report. (Courses are always printed in chronological order based on term.) Additionally, if any courses were transferred from an external organization, detail is listed. Codes include EN (regularly enrolled course credit), IT (internal transfer course credit), TE (test credit), OT (other credit), and TR (external transfer course credit).

Note. Course substitutions and overrides are noted 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 displayed and the GPA calculation is noted. A discrepancy occurs if the units earned differ from the units taken.

Click the Print button to store a printable PDF version of the Report Results page in Report Manager.

Checking for Report Errors

Access the Report Errors page.

Seq Nbr (sequence number)	A sequential number that was system-supplied. This number determined the order in which the individual report requests were processed.
Sequence	The message sequence number.
Message Text	Error description.

Producing a Batch Academic Advisement Transcript Report

In addition to processing advising reports for small groups of students, you can run a background process for large groups of students through the Batch Transcript Request component.

See Also

PeopleSoft 8 SPI Student Records PeopleBook, “Producing Transcripts,” Creating Batch Transcript Requests

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

This section provides an overview of what-if reports, and discusses how to define what if audit scenarios.

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

Using the what-if advising capabilities, you can run a simulated academic advisement report that compares the student's transcript against multiple careers, programs, plans, and/or sub-plans. Individual courses with credit can also be included in the process. Conditions such as multiple requirement terms can be set that enable the appropriate requirement groups to be used in the audit processing.

In addition, non-posted transfer credit can also be included in a what-if audit when the audit report is run from the self-service application. Modeling transfer credit enables students who are not term-activated, prospective applicants, or visitors to run a what-if audit using self-reported, completed, but not yet posted transfer credit. Instead of posting credit (which can only be accomplished if a student is term-activated), the model becomes completed. The internal equivalents are then available as input into the degree progress analysis, enabling the student, applicant, or visitor to see 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.)

The following what-if capabilities enable the academic advisor or student to run any number of degree audit reports based on what-if situations:

- The Course List What-If option is used to retrieve what-if individual courses from the established course catalog.
- The Quick What-If option is used to create a new what-if scenario (program, plan and sub-plan) for a student.
- The Stored What-If option is used to create or recall previously stored what-if information (program, plan, sub-plan, and requirement term) for a student.

The Course List What-If option can be used 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. The following combinations are possible: Course List What-If option alone, Course List What-If option and Stored What-If option, Course List What-If option and Quick What-If option, Stored What-If option alone, and Quick What-If option alone.

Pages Used to Define What-If Scenarios

Page Name	Object Name	Navigation	Usage
Course List What-If Analysis	SA_REQ_CRSE_WHIF	Click the Course List What-If link on the Request Detail page.	Select an existing course or 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 to retrieve available courses.	Review and select available courses.
Quick What-If Analysis	SA_REQST_DTL_SEC2	Click the Quick What-If link on the Request Detail page.	Run a simulated academic advisement report that compares the student's transcript against a one-time proposed academic career, program, plan, and/or sub-plan.
Program What-If	STDNT_PROG_WHIF	Manage Student Records, Define Academic Requirements, Use, Stored WhatIf, Program What-If Click the Stored What-If link on the Request Detail page.	Create a stored what-if program scenario for a student.
Plan What-If	STDNT_PLAN_WHIF	Manage Student Records, Define Academic Requirements, Use, Stored WhatIf, Plan What-If Click the Stored What-If link on the Request Detail page.	Create a what-if plan scenario for a student.
Sub-Plan What-If	STDNT_SUBPLAN_WHIF	Manage Student Records, Define Academic Requirements, Use, Stored WhatIf, SubPlan What-If Click the Stored What-If link on the Request Detail page.	Create a what-if sub-plan scenario for a student.

Selecting the Course List What-If Option

Access the Course List What-If Analysis page.

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

Enter the courses (if there is more than one course) in the order in which you want to simulate the courses being taken. If courses are required to be taken in a certain order (for example, 100-level courses before 200-level courses), then enter the simulated courses in the proper order.

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

Click the Search button to retrieve available courses. The Course Search page appears.

Entering a What-if Course

Access the Course Search page.

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

The system supplies the Units Taken field value on the Course List What-If Analysis page. You can change this value.

Entering Quick What-If Parameters

Access the Quick What-If Analysis Report page.

Quick What-If Analysis Report

Tam, Phillip

AA0022

PeopleSoft University

Current Information

Career:

Career Nbr:

Program:

Plan:

Sub-Plan:

Overrides

Career: GRAD

Graduate

Program Override: GLAU

Graduate Liberal Arts Programs

Plan Override: ENGL-PHD

English-PhD

SubPlan Override:

Requirement Term

0524

2004 SmQt

0524

2004 SmQt

0524

OK

Cancel

Quick What-If Delete

Quick What-If Analysis Report page

Career Information

Career Nbr (career number) Specify a value only if you want to override a specific career of the student. Leave blank to override all of the student's careers.

Program Specify a value only if you want to override a specific program of the student. Leave blank to override all of the student's programs.

Plan Specify a value only if you want to override a specific plan of the student. Leave blank to override all of the student's plans.

Sub-Plan Specify a value only if you want to override a specific sub-plan of the student. Leave blank to override all of the student's sub-plans.

Overrides

Career The substitute or what-if career.

Program Override The substitute or what-if program.

Plan Override The substitute or what-if plan.

SubPlan Override The substitute or what-if sub-plan.

Requirement Term

(Career Requirement Term) You must enter a what-if requirement term (catalog year) value for the career override. The system uses this value to select the correct effective dated, career level requirement groups.

(Program Requirement Term) If you specify a program override, you must enter a what-if requirement term. The system uses this value to select the correct effective dated, program level requirement groups.

(Plan Requirement Term) If you specify a plan override, you must enter a what-if requirement term. The system uses this value to select the correct effective-dated, plan level requirement groups.

(Sub-Plan Requirement Term) If you specify a sub-plan override, you must enter a what-if requirement term. The system uses this value to select the correct effective-dated, sub-plan level requirement groups.

Important! If the Current Information fields are left blank, then only the override values are all taken into account during the what-if analysis. Enter values in the Current Information fields if the student has multiple programs, plans, and/or sub-plans but only wants that specific program, plan, and/or sub-plan overridden during the what-if analysis. In such a case, enter the appropriate field value in order to restrict the what-if analysis. For example, if a student's primary plan is Accounting (but the student has a second plan of Communications) and the override plan is Business with a requirement term of Fall 1998, the analysis overrides all existing plans (Accounting and Communications) if the Plan field under Current Information is left blank. However, if *Accounting* is entered for Plan under Current Information, then the what-if analysis overrides the plan of Accounting only, and retains the plan of Communication – thus, the student is evaluated as a double major – Communication and Business.

OK, Cancel, and Quick What-if Delete Click OK to save and exit the Quick What-If Analysis Report page and return to the Request Detail page. Click Cancel to exit the page without saving the what-if information. Click Quick What-if Delete to delete all what-if field values.

Important! When you use the Quick What-If option, the student's academic record is temporarily (not permanently) modified. Any data you enter through the Quick What-If Analysis Report page is used only once because the data is not saved after you process the request.

Defining a Stored What-if Program for a Student

Access the Program What-If page.

Program What-If | Plan What-If | SubPlan What-If

Tam, Phillip ID: AA0022

Copy from student record: **Copy** Program Status: ActiveOnly

View All First 1 of 1 Last

Academic Career:	UGRD	Student Career Nbr:	1	+ -
*Status:	INCL	Include		
*Academic Institution:	PSUNV	PeopleSoft University		
*Academic Program:	LAU	Liberal Arts Undergraduate	<input type="checkbox"/>	Joint Prog Appr
Admit Term:	0290	1997 Fall		
*Requirement Term:	0290	1997 Fall		
Expected Grad Term:				
Career Requirement Term:				
Dual Academic Program:				
Campus:	WALCR	Walnut		
Acad Load:	Full-Time			

Program What-If page

Copy

Click to retrieve the student's existing record. Values are automatically supplied in appropriate fields. (The page must be in *Add* mode to create a new what-if program scenario.) You can use these field values to build what-if career and program data. Change field values and insert rows, as necessary.

Program Status

This value works in conjunction with the Copy button. If you select *Active Only*, then all active careers, programs, plans, and sub-plans are copied and can be used in this program what-if scenario. If you select *All Status*, then all careers, programs, plans, and sub-plans (both active and inactive) are copied and can be used in this program what-if scenario.

Academic Career and Student Career Number

The student's academic career and student career number automatically populate from the prompt page. (The student's primary career is designated as Student Career Number 0.) You can change these values.

To create a stored what-if scenario with multiple programs tied to the same career, insert two rows of career/program data on this page. (For example, you can insert a Liberal Arts program as well as a Fine Arts program and tie each to a career of Undergraduate.) Be sure to attach the program that you want as the student's what-if primary academic program to the row with the lowest *Student Career Number*. In the example above, one of the rows would be Undergraduate, Liberal Arts and the other row would be Undergraduate, Fine Arts. Each of these rows would have a different Student Career Number.

To create a stored what-if scenario with multiple careers, insert one additional row of data on this page for each additional career. (For example, you can insert a Liberal Arts program tied to an Undergraduate career as well as a Liberal Arts program tied to a Graduate career.) In this case, all Student Career Number field values should be 0. On this page, the Student Career Number

field values should only be different if you want to identify which career among identical career values references the primary academic program.

Status	Indicates how the program is processed in the what-if degree audit. Choices include <i>INCL</i> , <i>NINC</i> , and <i>OPT</i> . (The default value is <i>INCL</i> .) <i>INCL</i> means that the advisement status of the what-if career and program is included in the degree audit. <i>NINC</i> indicates that the advisement status of the what-if career and program is not included in the degree audit. <i>OPT</i> indicates that the what-if career and program appear on the report but are not counted towards graduation.
Academic Institution	Enter the academic institution that contains the stored what-if scenario.
Academic Program	The what-if academic program for the student.
Admit Term	The what-if admit term that indicates the term in which the student was admitted to the what-if program.
Requirement Term	The what-if starting term of the student. (Each requirement term has a begin and end date.) The system uses this value to select the appropriate effective dated program level requirement groups.
Expected Grad Term (expected graduation term)	The term in which the student is expected to graduate.
Career Requirement Term	Indicates which career level requirement groups are used in the audit. (For example, all undergraduate requirements with an effective date prior to Fall 1999 are used in the audit if the career requirement term is <i>Fall 1999</i> .)
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 a program is entered, then the student will have dual academic programs (as stated on this page) for this what-if scenario.
Campus	Enter the campus that the student attends.
Acad Load (academic load)	Enter the academic load for the student in this what-if scenario. Choices include <i>None</i> , <i>Full-Time</i> , and <i>Part-Time</i> . (The default value is <i>Full-Time</i> . <i>None</i> converts to <i>Full-Time</i> .) Full-time and part-time academic loads are defined by each institution.

Defining a Stored What-if Plan for a Student

Access the Plan What-If page.

Program What-If Plan What-If **SubPlan What-If**

Tam, Phillip ID: AA0022

View All 1 of 1

Academic Career: UGRD **Student Career Nbr:** 1

Status: Include **Admit Term:** 1997 Fall

Academic Program: Liberal Arts Undergraduate **Requirement Term:** 1997 Fall

Plan Description View All 1 of 1

***Academic Plan:** STATISTICS Statistics + -

Plan Sequence: 10 **Degree:** Concentration

Advisement Status: INCL Include **Degree Checkout Stat:**

***Requirement Term:** 0290 1997 Fall **Student Degree Nbr:**

Completion Term:

Plan What-If page

Academic Plan	Enter the what-if academic plan for the student.
Plan Sequence	Enter the what-if plan sequence number that indicates the order (or sequence) of multiple plans or sub-plans, if any. The plan with the lowest sequence number is considered primary within the program.
Advisement Status	Enter the advisement status for this what-if academic plan that indicates how the plan is processed in the what-if degree audit. Choices include <i>INCL</i> , <i>NINC</i> , and <i>OPT</i> . (The default value is <i>INCL</i> .) <i>INCL</i> means that the advisement status of the what-if plan is included in the degree audit. <i>NINC</i> indicates that the advisement status of the what-if plan is not included in the degree audit. <i>OPT</i> indicates that the what-if academic plan appears on the report but is not counted towards graduation.
Requirement Term	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 plan level requirement groups.
Degree	A display-only field that is associated with the plan.
Degree Checkout Status	A display-only field that does not affect the what-if analysis. If you click the Copy from student record button on the Program What-If page, a value may appear.
Student Degree Number	A display-only field that does not affect the what-if analysis. If you click the Copy from student record button on the Program What-If page, a value may appear.
Completion Term	A display-only field that does not affect the what-if analysis. If you click the Copy from student record button on the Program What-If page, a value may appear.

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

Access the SubPlan What-If page.

Program What-If Plan What-If SubPlan What-If

Tam, Phillip ID: AA0022

View All 1 of 1

Academic Career: UGRD **Student Career Nbr:** 1

Status: Include **Admit Term:** 1997 Fall

Academic Program: Liberal Arts Undergraduate PeopleSoft University

Academic Plan View All 1 of 1

Academic Plan: Statistics Concentration

Requirement Term: 1997 Fall

Academic SubPlan View All 1 of 1

Sequence Number: 10 + -

Academic Sub-Plan: [] []

Academic Sub-Plan Type: [] []

Advisement Status: INCL [] Include

***Requirement Term:** [] []

SubPlan What-If page

Sequence Number	Specifies the order (or sequence) of multiple sub-plans, if any. The sub-plan with the lowest sequence number is considered primary within the plan.
Academic Sub-Plan	The what-if academic sub-plan for the student.
Academic Sub-Plan Type	The appropriate academic sub-plan type prompts from the Academic Sub-Plan Table page.
Advisement Status	Indicates how the sub-plan is evaluated in the what-if degree audit. Advisement status values include the following: <i>INCL</i> (default): Indicates that the advisement status of the what-if sub-plan is included in the degree audit. <i>NINC</i> : Indicates that the advisement status of the what-if sub-plan is not included in the degree audit. <i>OPT</i> : Indicates that the what-if academic sub-plan appears on the report but is not counted towards graduation.
Requirement Term	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 sub-plan level requirement groups.

Processing Self-Service Advising Reports

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the Learner Services application, you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

The self-service Degree Progress Report feature enables students and advisors to process and view advising reports that you define for self-service processing. Users of this feature can conduct what-if scenarios and explore the course requirement consequences of completing additional coursework, or changing the student’s major, minor, sub-plan, and requirement term.

Prerequisites

Before individuals at your institution can use the self-service Degree Progress report feature, you must:

- License the Learner Services collaborative application.
- Assign student users an active program, a user ID, and a password.
- Assign advisors a valid user ID and password.
- Set up a self-service advising transcript type.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, “Setting Up Transcripts,” Defining Transcript Types

Pages Used to Perform Self-Service Advising

Page Name	Object Name	Navigation	Usage
Degree Progress Report	SS_ES_AARPT_TYPE	SA Self Service, Learner Services, Academics, View Degree Progress Report, Ss Es Aarpt Type	Students and advisors use this page to assess academic progress toward graduation. Students and advisors can run what-if reports to simulate additional coursework completion or to simulate a different academic career, program, plan, or sub-plan.
Report Results	SS_REPORT_RESULT_A	<ul style="list-style-type: none"> SA Self Service, Learner Services, Academics, View Degree Progress Report, Ss Report Result A SA Self Service, Learner Services, Academics, View Unofficial Transcript, Ss Report Result A 	Students and advisors use this page to view the academic advisement report.
View Previously Requested Reports	SS_STUREQ_RSLT	Click the View a Report that you had previously requested link on the Degree Progress Report page	Students and advisors use this page to review reports that they requested in the past. To view a specific report, students click the corresponding Go button.
Degree Progress Report – Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If Report button on the Degree Progress Report page.	Students and advisors use this page to enter hypothetical career, program, sub-plan, and requirement term information. Students or advisors must enter a required term for every career, program, plan, or sub-plan override option that they specify.
Degree Progress Report – Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on the Degree Progress Report page.	Students and advisors use this page to enter hypothetical coursework data.
Course List What-If Analysis Report – Course Search	STDNT_CRSE_SECPNL	Click the Search button on the Degree Progress Report – Course List What-If Analysis page.	Students and advisors use this page to select courses for their Course List Analysis report.

CHAPTER 12

Using the Analysis Database to Create User Configurable Reports

This chapter provides an overview of the analysis database, including all of the analysis database tables, and discusses how to:

- Run the process that populates the analysis database.
- Print the contents of the analysis database.
- Create a user defined advisement report using the analysis database.

Understanding the Analysis Database

The analysis database is a feature that integrates the power of the academic advising transcript with a large number of student data result tables.

On the Request Header page, one of the field values for Report Format is *Analysis Database*. The analysis database report format is a special report format that is computer-friendly rather than people-friendly. The report is written in computer-readable format so that you can write application programs against the analysis database tables. When the Report Format field value is *Analysis Database*, the report data is written to and stored in the analysis database tables. This database can then be used as the basis for user configurable reports using Crystal, SQR, or OLAP.

More information is stored in the analysis database tables than appears in the printed report formats. The database tables contain keys for each object in the report that an application program can use to reference other objects in the student's record that are not contained in the printed report. The analysis database contains data on courses that were considered for satisfying a requirement, but rejected. It also contains information on courses captured by global limits.

Data stored in these academic advisement analysis tables can be reused. The tables can be queried for data. In order to maximize performance, overly complex joins should be avoided. 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. (A script must be written by the database administrator in order 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.

Efficient processing of reports is always a priority, and there are several things you can do to maximize performance when writing reports against the analysis database. When using Crystal reports, it is best to create a temporary table where the data to be reported is denormalized into one table. Then use one SQL statement to retrieve the data in a sorted order, using breaks on the data to control the output. This is done to overcome the performance degradation that occurs when using multiple Crystal sub-reports in one report. Another task that would improve performance is to create indices on the analysis database tables so joins are on the indices. Setting the initial size of the tables correctly also improves performance. If the tables are not sized correctly, performance could quickly degrade as the tables grow in size. This is a task for the database administrator.

Populating the Analysis Database Tables

You can populate the analysis database tables by running the transcript request process for a single student or small group of students (through the Transcript Request component), or for a large population of students (through the Transcript Generation component).

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

1. Access the Request Header page.
2. Specify an advising transcript type in the Transcript Type field.
3. Specify a report type of *Analysis Database* in the Report Type field.

Running the transcript process with this option selected will send 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 ID's for the processing group.
5. (Optional) Enter what-if parameters.
6. If you have a small number of IDs to process, click the Process Request button to process the request and populate the analysis database tables. If you have a large number of IDs to process, save the request, note the request number, and then run the process through the Transcript Generation component.

Here's how to populate the analysis database tables for a large group of students (batch mode):

1. Access the Batch Transcript Request page.
2. Specify an advising transcript type in the Transcript Type field.
3. Select the Database Report check box.
4. Specify the parameters for the processing group.
5. Click the Run button to process the request and populate the analysis database tables.

See Also

Chapter 11, "Processing Academic Advising Reports," page 167

PeopleSoft 8 SPI Student Records PeopleBook, "Producing Transcripts," Creating Batch Transcript Requests

Printing the Contents of the Analysis Database

Use the Database Tables Report component to retrieve all data stored 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 see the data that is available for the student. On any specific day, one standard and one special report can be run for the same student.

Pages Used to Print the Contents of the Analysis Database

Page Name	Object Name	Navigation	Usage
Database Tables Report	RUNCTL_SRDBTBLS	Manage Student Records, Define Academic Requirements, Report, Database Tables Report, Database Tables	Enter the parameters that capture the student or group of students that you want to report, and process the report.

Processing the Database Tables Report

Access the Database Tables Report page.

Database Tables Report

Run Control ID: PSDF [Report Manager](#) [Process Monitor](#)

*As of Date:

ID:

Report Type: Standard Report

Database Tables Report page

As of Date

The database tables report will accurately reflect the contents of each academic advisement table for the designated student as of this date. (The current date is the default field value, but it can be modified. A value in this field is mandatory.)

ID

Enter the student's ID, or leave blank to return all values.

Report Type

Enter the report type. Choices include *SPC* and *STD*. *SPC* indicates a report with a special requirement usage, and *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 analysis database sequence number). If you process multiple reports for a student with the same report type on a single day, all data for the day appears on the Database Tables report.

Creating a Customized Report Using the Results in the Analysis Database Tables

Use SQL to print a report that contains the analysis database information. Your programmer must write a program that reports against the table in order to retrieve the data.

Once the data is retrieved, use Crystal, SQR, or OLAP to create a customized report. In fact, most tools that coordinate with SQL tables can be used.

Reviewing the Academic Advisement Analysis Database Tables

At a minimum, tables from the analysis database always contain the following column headings: ID, RPT_DATE, RPT_TYPE, and ANALYSIS_DB_SEQ.

Table Name: R_REPORT

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
WHAT_IF_FL		Char	1	What-If Flag
REPORT_REQUEST_NBR		Char	9	Report Request Nbr
INSTITUTION		Char	5	Academic Institution
TSCRPT_TYPE		Char	5	Transcript Type

Table Name: R_ORDER

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ENTRY_R_TYPE		Char	6	Valid Types: Career ('KEYCAR'), Program ('KEYPRG'), Plan ('KEYPLN'), Sub-Plan ('KEYSUB'), Requirement Group ('KEYRQG'), Requirement ('KEYREQ'), and Requirement Line ('KEYRQL').

Table Name: R_RQRMNT_GROUP

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
RQRMNT_GROUP	Y	Char	6	
RQ_DATE		PSDATE		Effective Date of Requirement Group

Column Name	Key	Data Type	Length	Comments
ENTRY_R_STATUS		Char	4	
PARTITION_FAIL		Char	1	Partition Fail Flag

Table Name: R_RG_LINK

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	

Table Name: R_TRANSCRIPT

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
CRSE_TAG	Y	Char	4	
INSTITUTION		Char	5	

Column Name	Key	Data Type	Length	Comments
SRC_INSTITUTION		Char	5	
ACAD_CAREER		Char	4	
SRC_CAREER		Char	4	
CRSE_CAREER		Char	4	
STRM		Char	4	Term
APPLIED_TERM		Char	4	
TERM_TAKEN		Char	4	
CLASS_NBR		Char	5	
STDNT_ENRL_STATUS		Char	2	
UNT_TAKEN		Decimal	3.2	
UNT_PRGRSS		Decimal	3.2	
GRADING_BASIS_ENRL		Char	3	
CRSE_GRADE_OFF		Char	3	
REPEAT_CODE		Char	4	
ASSOCIATED_CLASS		Smallint	4	
AUDIT_GRADE_BASIS		Char	1	
EARN_CREDIT		Char	1	

Column Name	Key	Data Type	Length	Comments
INCLUDE_IN_GPA		Char	1	
UNITS_ATTEMPTED		Char	1	Valid Choices: In Progress ('I') and Attempted ('Y').
GRADE_POINTS		Decimal	6.3	
CRSE_ID		Char	6	
CRSE_OFFER_NBR		Char	2	
SESSION_CODE		Char	3	
CLASS_SECTION		Char	4	
ACAD_GROUP		Char	5	
SUBJECT		Char	8	
CATALOG_NBR		Char	10	
DESCR		Char	30	
COMPONENT		Char	3	
CRS_TOPIC_ID		Decimal	3	
EQUIV_CRSE_ID		Char	5	
OVRD_CRSE_EQUIV_ID		Char	1	
START_DT		PSDATE		
END_DT		PSDATE		
CRSE_COUNT		Decimal	2.2	

Column Name	Key	Data Type	Length	Comments
CLASS_ENRL_TYPE		Char	1	
RQ_SCHOOL_TYPE		Char	4	
UNT_EARNED		Decimal	3.2	

Table Name: R_SUBSTITUTION

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
CRSE_TAG	Y	Char	4	
ACAD_GROUP		Char	5	
CRSE_ID		Char	6	
SUBJECT		Char	8	
CATALOG_NBR		Char	10	
DESCR		Char	30	
OPRID		Char	8	
DESCR254A		Char	254	

Table Name: R_REQUIREMENT

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_DATE		PSDATE		Effective Date of Student's Requirement
ITEM_R_STATUS		Char	4	
PARTITION_FAIL		Char	1	Partition Fail Flag

Table Name: R_RQRMNT_LINE

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		

Column Name	Key	Data Type	Length	Comments
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_LINE_NBR	Y	Char	4	
ITEM_R_STATUS		Char	4	
DISP_SELECT_LINE		Char	1	
REQ_LINE_TYPE		Char	3	

Table Name: R_CAREER

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ACAD_CAREER	Y	Char	4	
CAR_DATE		PSDATE		
ITEM_R_STATUS		Char	4	

Table Name: R_ACAD_PROG

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ACAD_PROG	Y	Char	5	
ACAD_CAREER		Char	4	
ITEM_R_STATUS		Char	4	

Table Name: R_ACAD_PLAN

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ACAD_PLAN	Y	Char	10	
ACAD_CAREER		Char	4	
ACAD_PROG		Char	5	
ITEM_R_STATUS		Char	4	

Table Name: R_ACAD_SUBPLAN

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
ACAD_SUB_PLAN	Y	Char	10	
ACAD_CAREER		Char	4	
ACAD_PROG		Char	5	
ACAD_PLAN		Char	10	
ITEM_R_STATUS		Char	4	

Table Name: R_COURSE_USEAGE

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		

Column Name	Key	Data Type	Length	Comments
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_LINE_NBR	Y	Char	4	
CRSE_TAG	Y	Char	4	
SEL_PROCESS_TYPE		Char	3	Valid Types: Verify ('VER'), Sequence ('SEQ'), Limit ('LIM'), and Standard ('STD').
SEL_MODE		Char	1	Valid Modes: Selected ('S'), Not Selected ('N'), and Excluded ('X').
IN_PROGRESS_GRD		Char	1	In Progress Flag: In Progress ('Y').

Table Name: R_COND_USEAGE

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	

Column Name	Key	Data Type	Length	Comments
REQUIREMENT	Y	Char	9	
RQ_LINE_NBR	Y	Char	4	
CONDITION_CODE	Y	Char	3	
CONDITION_OPERATOR	Y	Char	2	
CONDITION_DATA	Y	Char	10	

Table Name: R_UNIT_CRSE_GPA

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
UNITS_REQUIRED		Decimal	4.2	
UNITS_NEEDED		Decimal	4.2	
CRSES_REQUIRED		Decimal	4.2	
CRSES_NEEDED		Decimal	4.2	

Column Name	Key	Data Type	Length	Comments
GPA_REQUIRED		Decimal	3.3	
GPA_ACTUAL		Decimal	3.3	

Table Name: R_DESCRIPTION

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
DESCR_LN_NBR	Y	Smallint		
DESCR254		Char	254	

Table Name: R_OVERRIDE_RG

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		

Column Name	Key	Data Type	Length	Comments
RQRMNT_ GROUP	Y	Char	6	
RQ_RG_OVRD_ ACTION		Char	4	
OLD_UNITS		Decimal	4,2	
NEW_UNITS		Decimal	4,2	
OLD_CRSES		Decimal	4,2	
NEW_CRSES		Decimal	4,2	
REF_RQMT_ GROUP		Char	6	
OPRID		Char	30	
DESCR254A		Char	254	

Table Name: R_OVERRIDE_RQ

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_ SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_ GROUP	Y	Char	6	
REQUIREMENT		Char	9	

Column Name	Key	Data Type	Length	Comments
RQ_OVRD_ACTION		Char	4	
OLD_UNITS		Decimal	4.2	
NEW_UNITS		Decimal	4.2	
OLD_CRSES		Decimal	4.2	
NEW_CRSES		Decimal	4.2	
REF_REQUIREMENT		Char	9	
OPRID		Char	30	
DESCR254A		Char	254	

Table Name: R_OVERRIDE_LN

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_LINE_NBR	Y	Char	4	

Column Name	Key	Data Type	Length	Comments
RQ_LN_OVRD_ACTION		Char	4	
OLD_MIN_UNITS		Decimal	4.2	
NEW_MIN_UNITS		Decimal	4.2	
OLD_MAX_UNITS		Decimal	4.2	
NEW_MAX_UNITS		Decimal	4.2	
OLD_MIN_CRSES		Decimal	4.2	
NEW_MIN_CRSES		Decimal	4.2	
OLD_MAX_CRSES		Decimal	4.2	
NEW_MAX_CRSES		Decimal	4.2	
OPRID		Char	30	
DESCR254A		Char	254	

Table Name: R_COURSE_DIRECT

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence

Column Name	Key	Data Type	Length	Comments
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
REQUIREMENT	Y	Char	9	
RQ_LINE_NBR	Y	Char	4	
CRSE_TAG	Y	Char	4	
OPRID		Char	30	
DESCR254A		Char	254	

Table Name: R_RQDPLN_HEADER

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
PLANS_NEEDED		Smallint		

Table Name: R_RQDPLN_DETAIL

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ENTRY_SEQ	Y	Smallint		
RQRMNT_GROUP	Y	Char	6	
ACAD_CAREER	Y	Char	4	
ACAD_PROG	Y	Char	5	
ACAD_PLAN	Y	Char	10	
ACAD_SUB_PLAN	Y	Char	10	

Table Name: R_WHAT_IF

Column Name	Key	Data Type	Length	Comments
ID	Y	Char	11	Student's ID
RPT_DATE	Y	PSDATE		Report Date
RPT_TYPE	Y	Char	4	Report Type
ANALYSIS_DB_SEQ	Y	Smallint		Report Type Sequence
ACAD_CAREER		Char	4	
ACAD_CAREER_OVRD		Char	4	

Column Name	Key	Data Type	Length	Comments
CAR_REQ_TERM		Char	4	
ACAD_PROG		Char	5	
ACAD_PROG_OVRD		Char	5	
ACAD_PROG_TERM		Char	4	
ACAD_PLAN		Char	10	
ACAD_PLAN_OVRD		Char	10	
ACAD_PLAN_TERM		Char	4	
ACAD_SUB_PLAN		Char	10	
ACAD_SUB_PLAN_OVRD		Char	10	
ACAD_SUB_PLAN_TERM		Char	4	

APPENDIX A

Enhancing Performance in PeopleSoft Academic Advisement

This appendix provides an overview of issues that effect performance in PeopleSoft Academic Advisement, and discusses setup preferences for the following areas:

- Condition processing.
- Course share sets and restrictions.
- Course lists and wildcards.
- Use of *Include Equivalent Courses*.
- Relevant parameters.
- Transcript type setup.
- Batch processing.

Understanding Advising Performance

PeopleSoft Academic Advisement is a powerful and flexible tool because of the underlying concepts used to establish requirements and execute degree audits. Because of this flexibility, there are a number of ways to establish your degree requirement setup. This appendix discusses the processing consequences of various types of setup and enables you to create the most efficient setup possible; thus, reducing the amount of time the system requires to complete the report process.

Note. Processing an academic advising report is very CPU (central processing unit) intensive. Verify that your hardware configuration is appropriate for the PeopleSoft Academic Advisement application. When running online reports in two-tier mode, verify that you have 65 MB of RAM free for the process. If you are using an application server, multiply 65 MB by the number of concurrent processes.

See Also

“Hardware and Software Requirements” documentation on Customer Connection

Condition Processing

Condition processing, either through condition requirement lines or preconditions, can be a powerful tool that the system uses to determine both a student's academic status and whether it should apply a particular requirement to a student's advising report. For example, a specific requirement may only be applicable to Honors students, and a precondition of *Student Group Equal to Honors* could determine the student population to which the requirement applies. However, complex condition processing and multiple condition processing do take considerable processing time and therefore you should 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 considerably less time than processing one requirement group with large number of requirements that are all attached with preconditions.

In addition, processing time for conditions can be compounded with the use of entity groups and dynamic conditions. Once again, you may find that these are necessary for particular requirements, but you should use them sparingly.

If you must use entity groups, limit the number of rows within the entity group setup. The number of rows that exist on the entity group determines how many "hits" the system needs to make to the database in order to determine a true or false value. Sometimes it is possible to utilize the opposite operator, for instance *NOT IN*, that could reduce the number of rows the system must evaluate. For example, if a requirement should be evaluated for all students *except* those in one particular student group, rather than establishing an entity group with all student groups except that one and using an operator of *IN*, create an entity group with only that particular student group that you want to exclude and use an operator of *NOT IN*.

Course Share Sets and Restrictions

Course share sets enable the system to use courses in more than one *All Stats* requirement group. For instance, if a course could satisfy both a general education requirement and a major requirement, you may want to consider establishing a course share set to allow the course to satisfy both requirements.

Course share sets are only necessary if the requirements are 'capturing' course statistics through an *All Stats* requirement line. If the requirement is only verifying course information (set to *Verify*), then all courses are open to be 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 courses within the same requirement group (that you want the system to share), utilize the Partition Sharing option on the Requirement Group Parameters page. Partition sharing within a requirement group can be more efficient for the advising report process than course share sets.

One aspect of course share sets that takes considerable processing time is the evaluation of course share set restrictions. The larger the share set and the more complex the restriction, the more processing the restriction requires. If you need to set up limits on the sharing of courses, consider creating an academic requirement with a *Unit, Course, GPA Limit* line type that intersects the requirement groups to which the limit applies, instead of using a share set restriction. Having the advising system evaluate the limit once when it processes this limit, rather than considering the limit each time it encounters a requirement group within the share set, saves processing time.

Course Lists and Efficient Wildcard Course Lists

Wildcarding can be a very efficient way to establish course lists. To maximize efficiencies, consider the highest level you can establish a wildcard. For instance, if all Psychology courses are acceptable to fulfill a requirement, just indicate Psychology in the Subject field, rather than creating course sequences with Psych 1##, Psych 2##, and so on.

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

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

Using the Include Equivalent Courses Option

Within the setup of academic course lists, specifically on the Course Detail page, users can select the Include Equivalent Courses check box when entering a course ID. This functionality enables the system to consider the course ID as valid to satisfy a particular requirement (if all relevant parameters are met), and it also enables any equivalent course for this course ID (as established on the Course Equivalencies page under the Establish Courses menu) to satisfy the requirement.

If the Include Equivalent Courses check box is selected, the advisement engine must search the database for any valid course equivalencies, even if no equivalencies exist for this course ID. Therefore, we recommend that you clear the Include Equivalent Courses check box if the course ID has no equivalencies.

Relevant Parameters

Throughout the advisement application, you can set parameters at a number of different levels. To decrease processing time, use only those parameters absolutely necessary for the requirement. For instance, evaluate whether both a minimum unit and a minimum course count parameter are necessary. If all 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. Only use parameters at the academic course list level to exclude courses. If all the courses in the course list are 3 units or greater, there is no need to set a parameter of minimum units per course at 3. Only if the course could have an equivalent course of less than 3 units (such as a transfer course) that you consider unacceptable to fulfill the requirement, should you use the parameter. Any field that is not required by the system, and many parameters are not, should be filled out only when absolutely necessary. Whenever possible, leave the field in its default state, or clear the field so that it is blank.

Transcript Type Setup

In order to decrease processing time for an academic advisement report, consider the transcript type setup for advising reports. Determine whether or not printing the enrollment detail or transfer credit history with your advising reports is necessary for your business process. Institutions may want to display this information with such a report, but should be aware that this causes additional processing time.

There are times when utilizing the options on the transcript type setup would be more beneficial than processing requirements to produce the same information. For example, rather than creating large condition requirements to display academic program or academic standing information, enable this information to display through the transcript type setup. Reducing condition processing will increase performance.

Batch Processing

Depending on the number of CPUs at your institution, you can run batch transcript generation jobs concurrently. Rather than creating one large transcript request, separate the job into smaller populations, such as by academic program. A CPU will need to be devoted for each job, so the number of CPUs available will determine how many concurrent runs are possible. Remember to leave one CPU open for additional processing at your institution other than the transcript generation.

APPENDIX B

Course Limit Examples

This appendix is a supplement to the general documentation on limits, and provides examples and detailed instructions for setting up two types of course limit requirements:

- Local unit, course, or GPA limit requirements.
- Global course limit requirements.

See Also

Chapter 4, “Setting Up Academic Requirements,” Creating a Requirement Line Item, page 52

Setting Up a Local Unit, Course, or GPA Limit Requirement

Local limit requirements work to limit the number of units or courses that can be counted toward a specific requirement group, requirement, or requirement line. With the use of more advanced derived lists, local limits can also apply to a dynamically generated group of targets (such as all courses used by a particular plan). Unlike their *global* course limit requirement counterpart, *local* course limit requirements have a specific target to which they apply, even if that target is dynamically generated from a derived list.

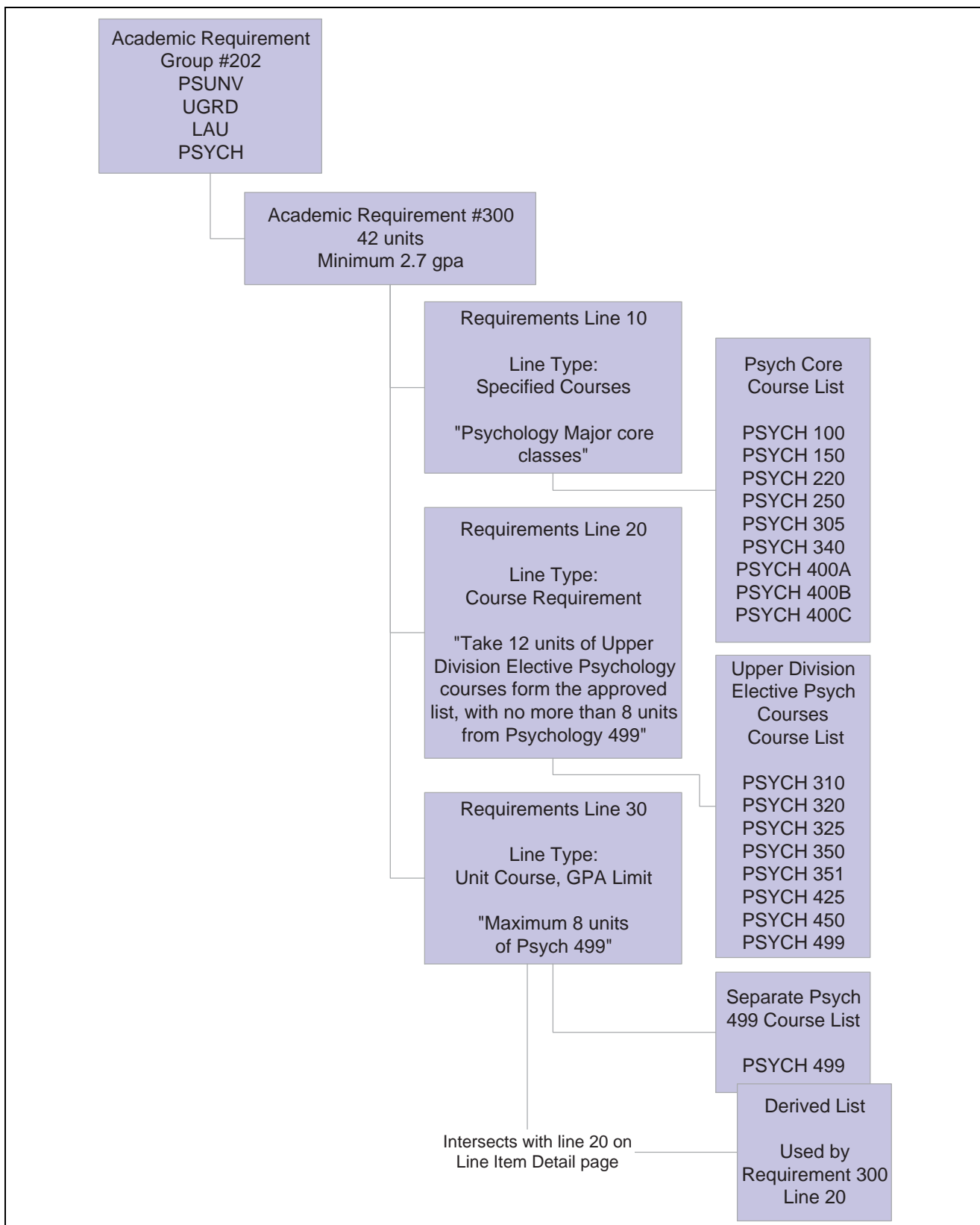
Here’s how to set up a simple local course limit requirement:

1. Create an academic course list that includes the course or courses that you want to limit. For example, Psychology 499 (to represent a special course for independent research, that is repeatable, but that can count towards graduation up to a maximum of 8 units.)
2. Locate an existing *All Stats* academic requirement Line Item that requires or includes as options these same courses. For example, the Psychology Major requirement.
3. For the same requirement mentioned in step 2, add another line item with a Line Type of *Unit, Course, or GPA Limit*.
4. On the Line Item Params page, for the *Unit, Course, or GPA Limit* line, specify a Maximum Units Allowed value of 8, and a Maximum Courses Allowed value of 999. The system will obey the lower of the two limit numbers (in this case, 8 units.)
5. Access the Line Item Detail page for the limit line, and attach the course list you created in step 1.
6. Save the requirement. By default, the target of your local course limit 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 Psychology Majors.
7. If you need to be more specific about the target of your course limit, you can do so by intersecting 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 (not all), you can skip step 6, and instead:

- a. On the Line Item Detail page, insert a second Line Detail Type of *DLST*. Select a List Include Mode of *Y — Intersection With*. Select a List Recall Mode of *Used by Requirement*, and specify the requirement and line number that you specifically want to limit.
- b. Save the requirement.

The following diagram displays an overview of how to set up a local unit, course, or GPA limit requirement.



Setting Up a Global Course Limit Requirement

Global limit requirements work to limit the number of units or courses that can be counted toward an overall advising report. Unlike their *local* course limit requirement counterpart, *global* course limit requirements typically have no specific target requirement, and go into effect as soon as they are encountered by the advising system.

The exception to the rule of global limits not requiring targets is when you want to apply a global limit to requirements that capture courses through a Credit Include Mode of *Verify*. As you will see in the following exhibit diagram, to enforce a global limit on Verify requirements, you must subtract a derived list of *Used By (your global limit)* from the Global Limit target requirement.

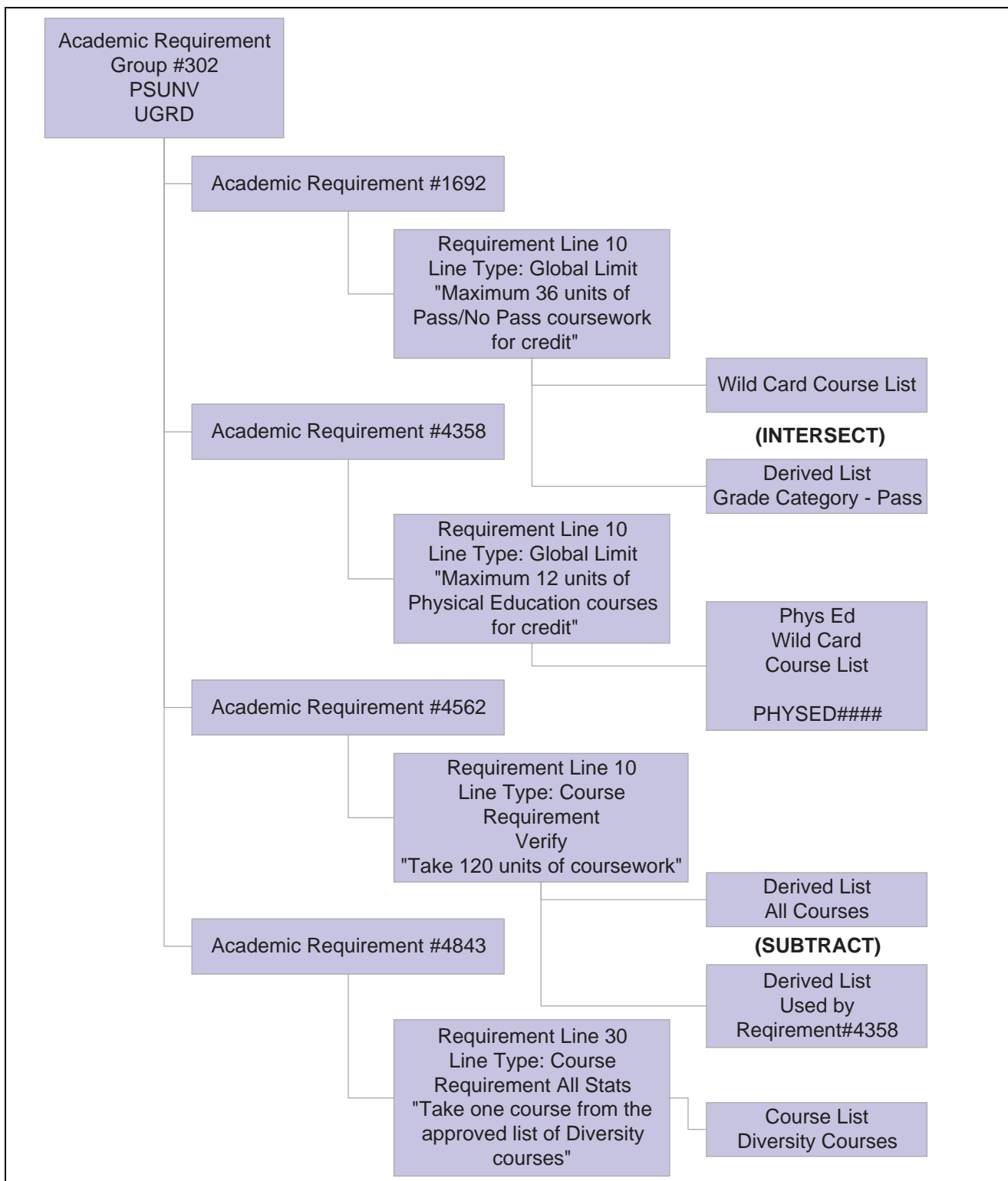
Reporting sequence and academic structure determine the order in which academic requirement groups are encountered.

See [Chapter 5, “Setting Up Academic Requirement Groups,” Understanding Academic Requirement Groups, page 81](#).

Here’s how to set up a global course limit:

1. Create an academic course list that includes the courses for which 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 sub-plan 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.



APPENDIX C

Sequential Restriction Examples

This appendix is a supplement to the general documentation on sequential restrictions, and provides examples and detailed instructions for setting up two types of sequential restriction requirements:

- Local sequential restriction requirements.
- Global sequential restriction requirements.

See Also

Chapter 4, “Setting Up Academic Requirements,” Creating a Requirement Line Item, page 52

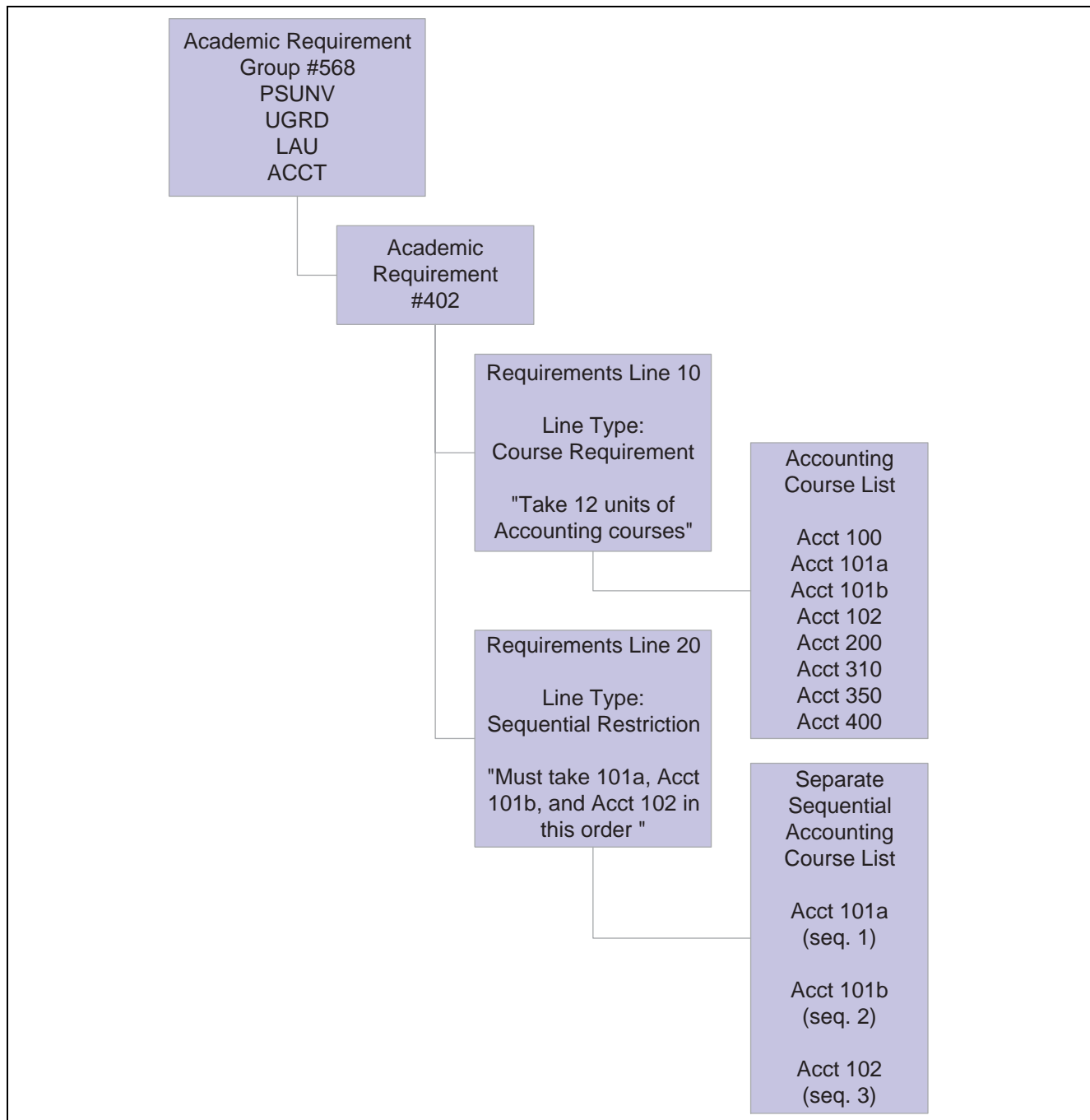
Setting Up a Local Sequential Restriction Requirement

Local restriction requirements enforce course completion in a particular order, for a specific requirement group, requirement, or requirement line. With the use of more advanced derived lists, local sequential restriction requirements can also apply to a dynamically generated group of targets (such as all courses used by a particular plan). Unlike their *global* sequential restriction counterpart, *local* sequential restriction requirements have a specific target to which they apply.

Here’s how to set up a simple local sequential restriction requirement:

1. Create an academic course list that includes the courses for which you want to control sequence. For example, Accounting 100a (course sequence 1), Accounting 100b (course sequence 2), and Accounting 200 (course sequence 3). Make sure that the course sequence value is assigned to the correct course on the Course Detail page.
2. Locate an existing *All Stats* academic requirement Line Item that requires these same courses. For example, the Accounting Minor requirement, which requires 18 units total, and points to a course list of many Accounting courses, in no particular order.
3. In the same requirement mentioned in step 2, add a second line item with a Line Type of *Sequential Restriction*.
4. Access the Line Item Detail page for line 20, and attach the special sequential restriction course list you created in step 1.
5. Save the requirement. By default, the target of your sequential restriction line item will be the current requirement. So, if you do not specify a target, you can save the requirement and simply attach it to a requirement group that applies to Accounting Minors.

The following diagram displays an overview of how to set up a local sequential restriction requirement.



Local sequential restriction requirement structure

Setting Up a Global Sequential Restriction Requirement

Global restriction requirements work to enforce that only those courses taken in a particular sequence can apply toward the advising report. Unlike their local sequential restriction counterpart, *global* sequential restriction requirements have no specified target (their default target is the entire audit), and they go into effect as soon as they are encountered by the advisement engine process (based on reporting sequence).

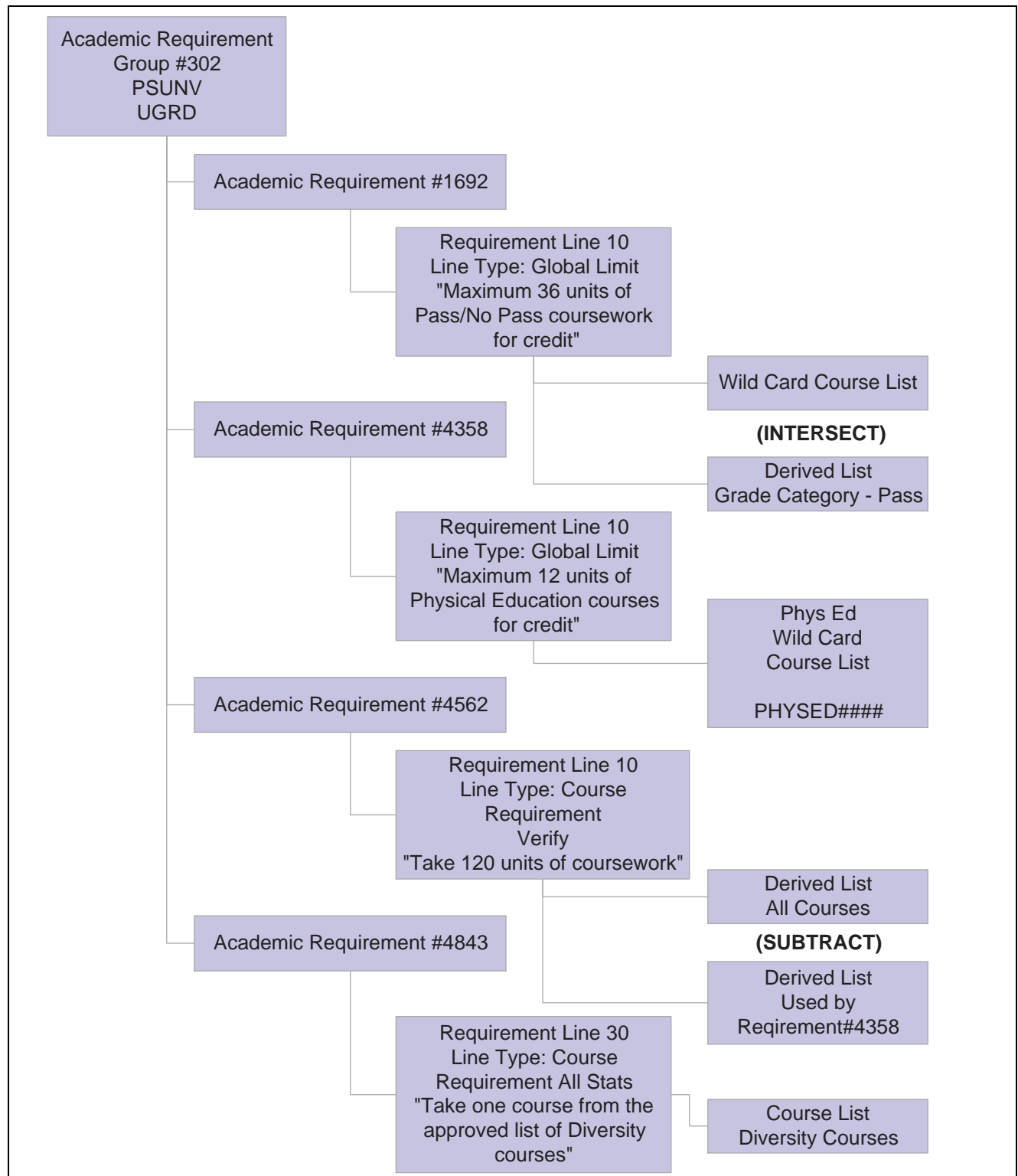
Reporting sequence and academic structure determine the order in which academic requirement groups are evaluated.

See [Chapter 5, “Setting Up Academic Requirement Groups,” Understanding Academic Requirement Groups, page 81.](#)

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 sub-plan level requirement group. What is important to note is that the system begins enforcing the global sequential restriction only when it is encountered by the advisement engine. Therefore, the higher you place the sequential restriction requirement, the sooner the system will “see” the requirement and begin enforcing it.

The following diagram displays an overview of how to set up a global sequential restriction requirement.



Global limit structure

APPENDIX D

PeopleSoft Academic Advisement Reports

This appendix provides an overview of PeopleSoft Academic Advisement reports, lists common elements, and enables you to:

- View summary tables of all reports.
- View report details and tables accessed.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

PeopleSoft Academic Advisement Reports: A to Z

This table lists the PeopleSoft Academic Advisement reports, sorted alphabetically by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
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)	Manage Student Records, Define Academic Requirements, Report, Miscellaneous Reports, Miscellaneous Reports	RUNCTL_SRMISRPT
SRDBTBLS Database Tables report	The database tables report lists all data stored in each academic advisement table for a specific student on a specific date. (SQR)	Manage Student Records, Define Academic Requirements, Report, Database Tables Report, 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)	Manage Student Records, Define Academic Requirements, Report, Miscellaneous Reports, Miscellaneous Reports	RUNCTL_SRMISRPT

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)	Manage Student Records, Define Academic Requirements, Report, Advisement Group Summary, Advisement 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)	Manage Student Records, Define Academic Requirements, Report, Reverse Engineering, Reverse Engineer	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)	Manage Student Records, Define Academic Requirements, Report, Requirement Advisement, Requirement Adv	RUNCTL_SRRQRADV

Report ID and Report Name	Description	Navigation	Run Control Page
SRTRPRNT Advisement report or Transcript report	<p>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).</p> <p>The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the PeopleSoft Academic Advisement application.</p> <p>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)</p>	Manage Student Records, Manage Academic Records, Process, Transcript Print, Transcript Print	RUNCTL_SRTRPRINT
SR777 Advisement report or Transcript report	<p>A singular advisement report, or a singular transcript report. The transcript type you specify at run time determines which format the system uses (advisement or transcript).</p> <p>The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the PeopleSoft Academic Advisement application.</p> <p>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. (Crystal)</p>	<p>Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Report Results</p> <p>Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Report Results</p>	SA_REPORT_RESULTS

Report ID and Report Name	Description	Navigation	Run Control Page
SR778M Advisement report or Transcript report	<p>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).</p> <p>The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the PeopleSoft Academic Advisement application.</p> <p>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. (Crystal)</p>	<p>Manage Student Records, Define Academic Requirements, Report, Student Advisement Report, Request Detail</p> <p>Manage Student Records, Manage Academic Records, Inquire, Transcript Request, Request Detail</p>	SA_REQUEST_DETAIL

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

Index

A

- academic advisement data reports 151
- academic advisement reports
 - processing 167
- academic advisement transcript report
 - producing 168
- academic course lists
 - establishing 19
- academic entity groups
 - setting up 134
- Academic Requirement Group Summary
 - page 113
- academic requirement groups
 - setting up 81
- Academic Requirement Summary
 - page reviewing 115
- academic requirements
 - setting up 29
- additional documentation x
- Advisement Course List Summary
 - page 115
- Advisement Group Summary report 224
- Advisement Group Summary Report
 - page 152
- advisement overrides and course
 - substitutions 123
- Advisement report 225–226
- advising report results
 - viewing and printing 175
- advising reports 167
- analysis database
 - creating a customized report using 190
 - printing the contents of 189
 - report format 187
 - tables 190
 - using 187
- appended requirement group plans
 - identifying 110
- application fundamentals ix
- Authorize Student Exceptions page 124

C

- comments, submitting xiii
- common elements xiii
- condition controls

- external degree check condition process
 - identifier for 142
- internal degree check condition process
 - identifier for 142
 - specifying 142
- Condition Controls page 134, 142
- Condition Line page 134, 136
- condition parameters
 - creating 140
 - external degree check condition process
 - identifier for 140
 - internal degree check condition process
 - identifier for 140
 - milestone check condition process
 - identifier for 140
- Condition Parameters page 134, 140
- Condition Processes page 145
- Condition Processes table 144
- condition specifications 136
- Condition Table report 223
- Consolidated Publications Incorporated (CPI) x
- contact information xiii
- country-specific documentation xii
- course and requirement waivers 123
- Course Description page 116
- course directives and overrides 123
- course limit examples 213
- Course List Description page 19
- course list descriptions
 - setting up 19
- course list detail
 - creating 21
- Course List Detail page 19, 21
- course list parameters
 - establishing 25
- Course List Parameters page 19, 25
- Course List Summary page 116
- Course List What-If Analysis page 178
- Course List What-If Analysis Report
 - page 186
- Course Search page 178–179
- course share sets 117
 - setting up 118
- Course Share Sets page 118

Course Substitution page 129
 courses
 sharing 117
 credit include mode diagram 41
 cross-references xii
 Cum. Grade Pt. Average Table page 13
 cumulative GPA 11
 custom conditions
 creating and using 133
 defining 144
 Customer Connection Website x
 customized report using the analysis
 database
 creating 190

D

Database Tables report 223
 database tables report (SQR)
 producing 157
 Database Tables Report page 157, 189
 Degree Progress Report - Course List
 What-If Analysis page 186
 Degree Progress Report - Quick What-If
 Analysis Report page 186
 Degree Progress Report page 186
 Detail page 85, 100
 Detail Parameters page 85, 105
 documentation
 country-specific xii
 printed x
 related x
 updates x
 dynamic conditions 133
 defining 136

E

Entity Group page 134
 entity group table and condition table
 reports
 producing 158
 Entity Group Table and Condition Table
 Reports page 158
 Entity Group Table report 223
 entity groups 133
 expanded conditions
 creating and using 133
 external degree check
 condition process identifier for condition
 controls 142

condition process identifier for condition
 parameters 140

F

From page 124, 127

G

glossary 227
 grade category 11
 Grade Category page 11
 Grade Category Table page 11
 group line type on Detail page 100

I

internal degree check
 condition process identifier for condition
 controls 142
 condition process identifier for condition
 parameters 140

L

limits
 examples of 213
 line detail type on Line Item Detail
 page 66
 Line Item Detail page 31, 66
 Line Item page 31, 52
 Line Item Parameters page 31, 57
 line type on Line Item page 52
 list include mode field value 77

M

milestone check 140, 142

N

notes xii

P

Parameters page 31, 36, 85, 94
 partial or split course 77
 partition 76
 partition sharing 40
 PeopleBooks
 ordering x
 PeopleCode, typographical
 conventions xi
 PeopleSoft application fundamentals ix
 performance

- academic advising report
 - processing 209
- Plan What-If page 178, 182
- Plans Appended page 86, 110
- Plans Required page 85, 108
- pre-condition for academic
 - requirement 34
- pre-condition for academic requirement
 - group 92
- prerequisites ix
- print control and credit include mode
 - settings 46
- Print Options - Requirement Advisement
 - Report page 161
- Print Options page 152, 154, 159
- printed documentation x
- processing order 176
- Program What-If page 178, 180

Q

- Quick What-If Analysis page 178
- Quick What-If Analysis Report page 179

R

- related documentation x
- report errors
 - checking 176
- Report Errors page 169, 176
- Report Results page 169, 175, 186
- reporting order 176
- reports appendix 223
- Request Detail page 169, 173, 177
- request header
 - defining 169
- Request Header page 169
- required plans and subplans
 - specifying 108
- Requirement Advisement report 224
- requirement advisement report (SQR)
 - producing 159
- Requirement Advisement Report
 - page 159
- requirement advisement report parameters
 - defining 159
- Requirement Description page 114
- requirement designation 27, 107
- Requirement Group Description page 114
- requirement group detail
 - defining 100

- requirement group detail parameters
 - setting up 105
- Requirement Group page 85–86
- requirement group parameters
 - establishing 94
- Requirement Group Summary page 114
- requirement group, requirement, and course
 - list summaries
 - reviewing 113
- requirement groups
 - setting up 86
- Requirement Line Description page 114
- requirement line item
 - creating 52
- requirement line item detail
 - setting up 66
- requirement line item parameters
 - specifying 57
- Requirement page 31
- requirement parameters
 - establishing 36
- Requirement Summary page 114
- requirement usage 11
- Requirement Usage page 16
- Reverse Engineering report 224
- reverse engineering report (SQR)
 - producing 163
- Reverse Engineering Report page 163

S

- self-service advising reports
 - understanding 185
- Send To Information page 169, 174
- sequential restriction examples 219
- sharing courses 117
- special requirement usage 11
- split course 77
- stored what-if plan for a student
 - creating 182
- stored what-if program for a student
 - creating 180
- stored what-if sub-plan for a student
 - creating 184
- Sub-Plan What-If page 178
- SubPlan What-If page 184
- suggestions, submitting xiii

T

- terms 227

- To page 124, 127
- Transcript report 225–226
- transcripts to process
 - selecting 173
- typographical conventions xi

U

- usage field
 - Course List Description page 21
 - Requirement Group page 90
- user configurable reports
 - using the analysis database to create 187

V

- vectors 76
- View Previously Requested Reports
 - page 186
- visual cues xii

W

- warnings xiii
- what-if capabilities
 - using 177
- wildcard indicator
 - Course List Detail page 22