Producing Academic Advisement Reports

Understanding Academic Advisement Reports

The advisement report is the degree audit report that reflects a student's progress towards graduation. This report is the core function of the Academic Advisement application. The report indicates whether the student has completed all of the requirements that the student needs to graduate or whether the student still needs to satisfy outstanding requirements.

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

Using the what-if advising capabilities, you can run a simulated advisement report for a student that shows degree progress based on courses the student proposes to take. You can also run a simulated academic advisement report based on simulated careers, programs, plans, and subplans.

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

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

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

Note: During the analysis process, the advisement engine does not recognize courses that you entered into the system using the Historical Course Enrollment page. Any historical courses that you entered into a student's record are used for record and history tracking purposes only.

Prerequisites for Producing Academic Advisement Reports

Before you can process advisement reports, you must:

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

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Related Links

"Understanding Installation Setup and System Defaults (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"

Setting Up Advisement Report Types

Setting Up Report Identifiers

Understanding Batch Academic Advisement Reports

Producing Academic Advisement Reports

This section discusses how to:

- Select general parameters.
- Add a what-if course.
- Select student and what-if data for processing.

Pages Used to Create an Academic Advisement Report

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

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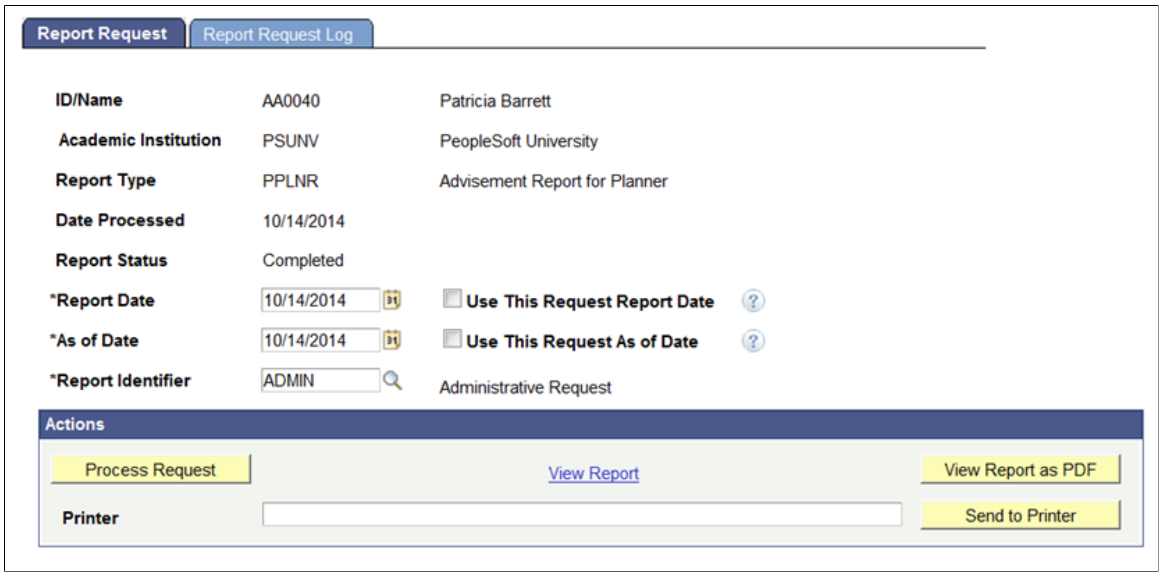
Selecting General Parameters

Access the Report Request page (Academic Advisement, Student Advisement, Request Advisement Report).

Image: Report Request page

Bundle 35. New page design.

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



Report Date

Bundle 35. New behavior.

Reflects the Report Date value identified in the advisement report type setup.

Note: If the default value defined for the advisement report type is *Current Date*, then two additional items appear on the page: the Use This Request Report Date check box and the ? icon, that offers explanatory text.

As of Date

Bundle 35. New behavior.

Reflects the As of Date value identified in the advisement report type setup.

Note: If the default value defined for the advisement report type is *Current Date*, then two additional items appear on the page: the Use This Request As of Date check box and the ? icon, that offers explanatory text.

Use This Request Report Date

Bundle 35. New check box.

This check box appears only when the Report Date value on the advisement report type setup is *Current Date*.

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Select this option for the request process to use the user-defined date as the report date. If the check box is not selected, then the Report Date on the request is updated with the current date.

Use This Request As of Date

Bundle 35. New check box.

This check box appears only when the As of Date value on the advisement report type setup is *Current Date*.

Select this option for the request process to use the user-defined date as the As of Date. If the check box is not selected, then the As of Date on the request is updated with the current date.

This help icon appears only when the As of Date or Report Type values on the advisement report type setup are *Current Date*.

Mouse-over the icon to read explanatory text for the check box. You can customize the text to suit your need using the Message Catalog:

- Use this Request As of Date check box: Entry 14530, 13.
- Use this Request Report Date check box: Entry 14530, 14.

Report Identifier

Enter the report identifier (for example, ADMIN) from the Report Identifier table.

Actions

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

View Report

Click to view the report that was generated. This link appears on the page after the report request is processed.

View Report as PDF

Click to view a .PDF version of the advisement report. This button appears on the page after the request is processed.

Printer

Enter the path for your local postscript printer. This field appears on the page after the request is processed.

Send to Printer

Click to send the report results to the designated printer. This button appears on the page after the request is processed.

What-If Information

Use Career Simulation

Select to indicate that you want to set up a what-if scenario.

Note: You do not need to select this check box if you want to set up a course what-if scenario only.

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If selected, the View/Change the Career Simulation link appears. Click to access the Create What-If Scenario page to create a what-if career scenario.

Add a What-If Course

Click to access the Advisement Report Request - Course Search page.

You can use the Advisement Report Request - Course Search page to select a course that you want included in the degree audit.

Enter the courses in the order in which you want to simulate their being taken. The number of what-if courses you add has no limit. Click the Add a What-If Course link each time you want to add a what-if course to the setup. You must select a career, term, and then subject before executing the search.

After you have selected the course, subject, catalog number, units, requirement designation (if applicable), and topic ID (if applicable), these values appear on the Report Request page. You can change these values as desired. You can also enter a specific academic term. The more data you enter about the what-if course, the more accurately the degree audit can evaluate the what-if course.

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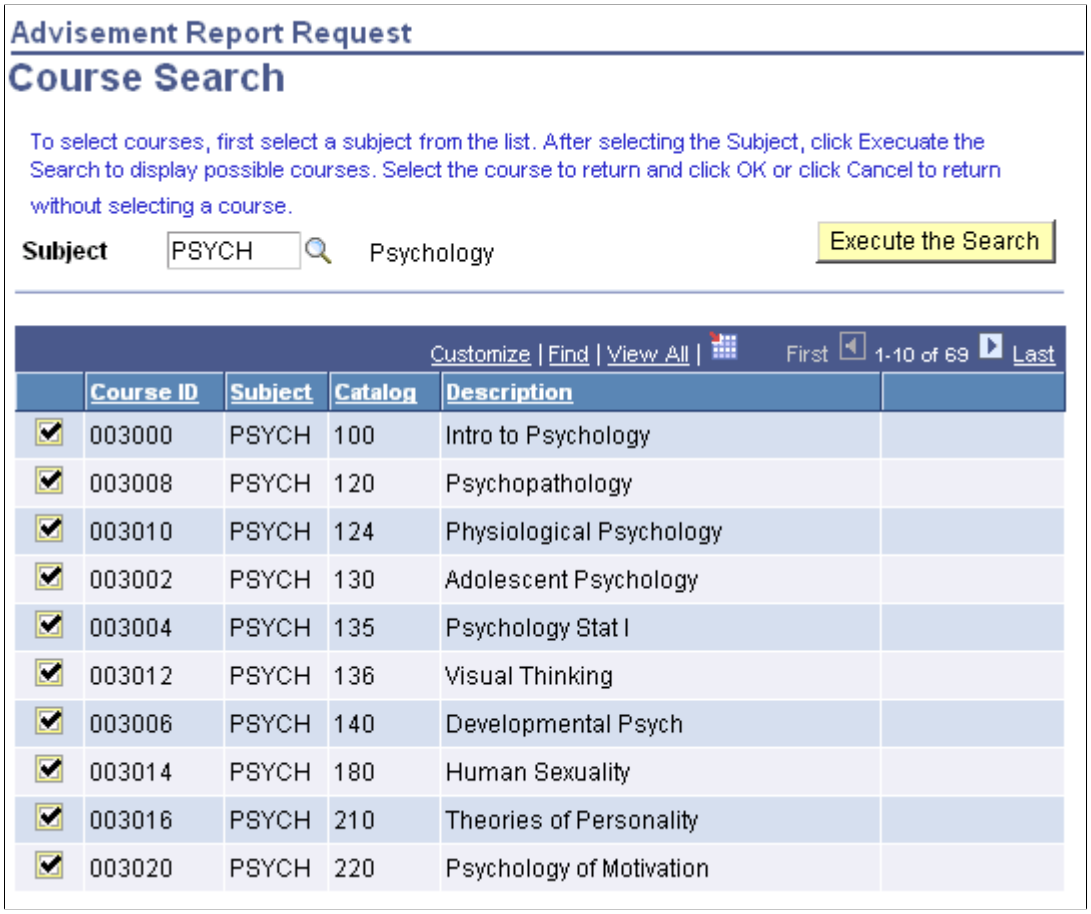
Adding a What-If Course

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

Image: Advisement Report Request - Course Search page

This example illustrates the fields and controls on the Advisement Report Request - Course Search page. You can find definitions for the fields and controls later on this page.



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

Subject Enter the subject.

Execute the Search Click to display a list of courses. Select the check box next to the required course, and then click the OK button. The course then appears on the Report Request page.

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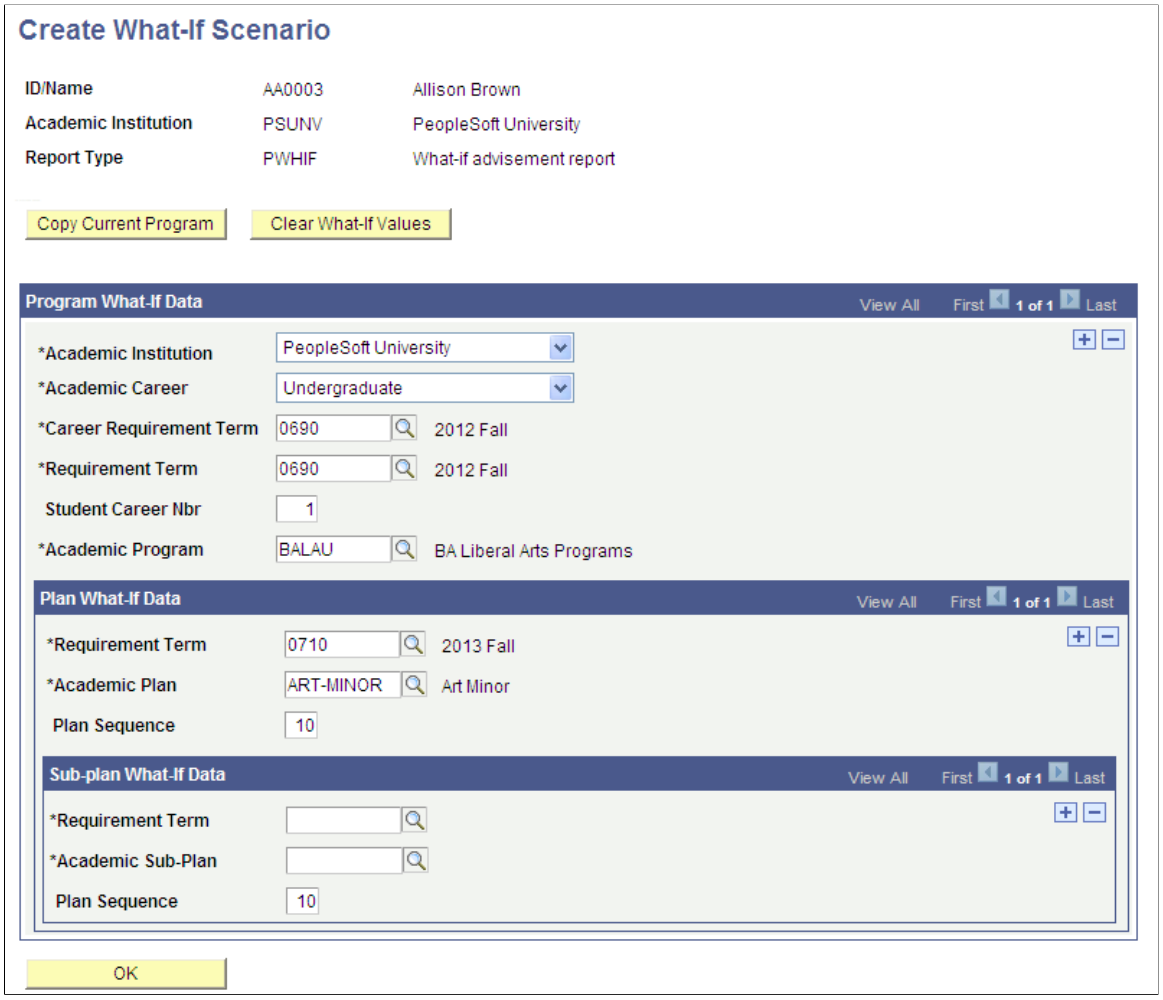
Selecting Student and What-If Data for Processing

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

Image: Create What-If Scenario page

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



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

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

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

Program What-If Data

Academic Institution This field defaults to the institution for which the report type was defined. Do not change this value.

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Academic Career Enter the value for the what-if career.

Career Requirement Term Enter a what-if requirement term value for the career override. The system uses this value to select the correct effective-dated career-level requirement groups.

Requirement Term Enter the what-if program requirement term. The system uses this value to select the appropriate effective-dated program-level requirement groups.

Student Career Number The default value on this page is 1. You can change the student career number for use in the scenario.

Academic Program Enter the academic program value that you want to use in the what-if degree audit.

You can use one or many programs in the what-if scenario.

Plan What-If Data

Requirement Term Enter the requirement term for the what-if plan. The system uses this value to select the appropriate effective-dated plan-level requirement groups.

Academic Plan Enter an academic plan for use in the what-if scenario.

The system uses this value to select the correct effective-dated plan-level requirement groups.

Plan Sequence Displays a sequence number. This sequential number is supplied by the system.

This number indicates the order or sequence of multiple plans, if any. The plan with the lowest sequence number is considered primary within the plan. You can override the number.

Sub-plan What-If Data

Requirement Term Enter the requirement term for the what-if subplan. The system uses these values to select the appropriate effective-dated subplan-level requirement groups.

Academic Sub-Plan Enter an academic subplan for use in the what-if scenario. The system uses this value to select the appropriate effective-dated subplan-level requirement groups.

Plan Sequence Displays a sequence number. This sequential number is supplied by the system. This number indicates the order (or sequence) of multiple subplans, if any. The subplan with the lowest sequence number is considered primary. The user can override the number, if necessary.

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

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