Using Academic Advisement Self Service

Prerequisites for Using Academic Advisement Self Service

To take full advantage of the self-service features, including the course planning feature (known as My Planner), class planning feature (known as the Shopping Cart) and enrollment capabilities, your institution must, for example:

- Set up courses in the course catalog.
- Schedule classes.
- Define advisement report types.
- Identify those report types for use in self-service on the Academic Institution 7 page.
- Run those report types in batch (one for My Academic Requirements and one for My Planner and Search by My Requirements).
- Decide how the reports will be refreshed (real-time, for example).
- Establish a plan for periodically refreshing those reports in batch.

A number of users – prematriculated students, students, and advisors – can take advantage of some of the Academic Advisement self-service features. To do so requires an EMPLID and a user profile that enables them to access and use the self-service pages.

The What-If Report – What-if Report Selection page and the What-If Report – Create What-if Scenario page are designed for use by advisors, students, and prematriculated students (for example, prospective students). But you must provide your users with access to the respective pages: SAA_SS_WHATIF_SEL and SAA_SS_WHATIF.

Other self-service pages are designed for students only and are accessible to active students only (students whose program status is *active*.) Examples are My Planner, Plan by My Requirements and Search by My Requirements.

If your institution is processing degree progress reports using transcript types (versus advisement report types), you must turn off security to the component, SAA_SS_DPR_ADB.

Important! Before users can view the interactive advisement report in self-service, your institution must first generate the relevant report types for the students, either in batch or individually, using the administrative components.

Related Links

Setting Up Self-Service Features for Academic Advisement

"Setting Up Advisement Report Types (PeopleSoft Campus Solutions 9.0: Academic Advisement)"

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

"Identifying Self-Service Report Types (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"

Viewing an Advisement Report

This section provides an overview of My Academic Requirements and lists the pages used to view an advisement report.

Understanding My Academic Requirements

The self-service functionality provides students with an interactive advisement report that they can use to evaluate their academic progress, access course and class detail, add courses to their planner, place classes in their shopping carts, and enroll in classes. The system can generate the report in real time and the report displays a date and time stamp so that the user knows when the report was last generated.

Depending on your Installation Student Administration setup, you can implement the advisement report using either the Academic Advisement or the Program Guide installation option.

If your institution uses Academic Advisement, the My Academic Requirements page reflects the results of a degree audit. When students access the My Academic Requirements page, satisfied academic requirement groups are collapsed, and unsatisfied ones are expanded. Data about the degree requirements appears in hierarchical structure that corresponds with your institution's advisement setup. For example, a requirement and its contents appear below a heading for a requirement group. In general, lists of courses that may be used or are used to satisfy a given requirement appear below the requirement line, which in turn appears below the requirement. Requirement group report descriptions appear in group boxes, and details about requirements, which are attached to the requirement groups, appear below the requirement groups. Examples of these details include report long descriptions, course statistics, and course lists. Whether specific details, such as requirement line data, appear depends on the setup of your institution. When details are available for a student to view, a caret appears next to the requirement group, requirement, or requirement line, as needed. The icons in the legend and the statuses of *Satisfied* and *Not Satisfied* communicate the completion status of the courses and degree requirements. If there are exceptions that your institution has made to a student’s degree requirements, those also appear on the interactive report. For example, if a change was made so that a student needs to take three credits instead of six for a given requirement, the explanation about the change will be accessible in the relevant area of the report (next to the units required). Similarly, if a course directive (substitution) was made, a Notes column will appear on the report, in the course grid next to the replacement course. A hyperlink directs the user to the explanation about the exception.

The setup of your institution determines whether the report is generated in real time, and it affects which details appear on the report. For example, your institution controls whether a requirement line long description appears on the report or whether the course list should appear. The icons that appear in the legend of the report are dictated by the setup of the advisement report type. The advisement report type setup also dictates whether the report reflects the evaluation of in-progress, what-if, shopping cart, and planned courses. Additionally, you define (on the Define Advisement Report Types page) the other attributes of the report, such as whether topics should display on the report, or whether the audit should evaluate completed or self-reported transfer credit models.

If your institution selects the Program Guide installation option, then the report that appears on the My Academic Requirements page has a different look because the data comes from the Program Guide requirements. Because no degree audit is performed against Program Guide rules, the report does not indicate whether a rule is satisfied or not. Instead, My Academic Requirements displays descriptive

 Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

information from the Program Guide course lists, requirements, and requirement groups. Courses taken, planned, and in progress appear on the report, but a student, along with his advisor, must evaluate his degree progress. Students can still use the Program Guide report to plan or enroll in courses.

See Setting Up Self-Service Features for Academic Advisement.

Using the Search by My Requirements feature, students can access additional information and perform these actions:

- Access course details.
- View wildcard course list information.
- View information about exceptions and overrides.
- Add classes to their shopping cart.

Pages Used to View an Advisement Report

Page Name	*Definition Name*	*Navigation*	*Usage*
My Academic Requirements	SAA_SS_DPR_ADB	Self Service, Degree Progress/ Graduation, My Academic Requirements	Students assess academic progress toward graduation, review course detail, add courses to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.
My Academic Requirements	SAA_SS_DPR_AAL	Self Service, Degree Progress/ Graduation, My Academic Requirements	Students review their program guide, courses taken, review course detail, add courses to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.
My Academic Requirements – Course Detail	SSS_CRSE_OFFER_DTL	Self Service, Degree Progress/Graduation, My Academic Requirements Click a course description link.	Students review course details, add a course to My Planner, view class sections for a specific term, and, if term activated, add a class to their shopping cart.
My Academic Requirements - Course List Detail	SAA_SS_DPR_AAL_WC	Self Service, Degree Progress/Graduation, My Academic Requirements Click a course link.	View details about a course list.

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

Page Name	*Definition Name*	*Navigation*	*Usage*
My Academic Requirements	SAA_SS_DPR_ADB_DTL	Self Service, Degree Progress/Graduation, My Academic Requirements Click the numeric link in the Notes column (if applicable). Or, if the exception is a change, click the Note link to view the details of the change.	View a description of any exception or override that affects the course or the requirement group, requirement or requirement line.
What-If Report – What-if Report Selection	SAA_SS_WHATIF_SEL	Self Service, Degree Progress/Graduation, View What-if Report	Student or prematriculated student can view an existing report or initiate the steps to create a new what-if advisement report.
What If Report	SAA_SS_DPR_ADB	Click the report date link on the What-If Report – What-if Report Selection page.	Student or prematriculated student can view a saved what-if report.
What-If Report – Create What-if Scenario	SAA_SS_WHATIF	Click the Create New Report button on the What-If Report –What-if Report Selection page.	Student or prematriculated student can define a what-if scenario and generate a what-if advisement report. Depending on the setup, the student may also be able to define a course what-if scenario.
What If Report – Select Course for What-if Scenario	SSS_BROWSE_CATLG	Click the Browse Course Catalog button on the Create What-if Scenario page.	Student or prematriculated student can select courses for the what-if scenario.

Searching for Classes by Academic Requirements

This section provides an overview of the Search by My Requirements feature and lists the pages used to access this feature.

Understanding Search by My Requirements

The Search by My Requirements feature enables students to search for classes based on their degree requirements. The information that appears on the page is based on the student's most recently run advisement report, but the presentation of the information varies from that shown on the My Academic Requirements page because the student using the information intends to enroll in a class.

The main difference between the Search by My Requirements and My Academic Requirements pages is that the course lists include courses offered for the selected term only. Also, whereas the institution may or may not include planned courses on the My Academic Requirements report type, the data included on the Search by My Academic Requirements includes planned courses. As with My Academic Requirements, the data reflects the report type and other advisement setup. Finally, students must be eligible to enroll in order to search for classes by academic requirements.

 Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

If your institution selects the Program Guide installation option, then the report that appears in Search by My Academic Requirements looks and operates differently because the data comes from the Program Guide requirements. Also, because no degree audit is performed against Program Guide rules, the report does not indicate whether a degree requirement is satisfied or not.

Using the Search by My Academic Requirements feature, students can access these additional details and perform these actions:

- Access course detail.
- Add courses to their planner.
- View class sections.
- View wildcard course list information.
- View information about exceptions and overrides.

Pages Used to Search by My Requirements

Page Name	***Definition Name***	***Navigation***	***Usage***
Add Classes - Search by My Requirements	SAA_SS_DPR_ADB_SR	Self Service, Enrollment, Enrollment: Add Classes Select the term (as needed). Click the Change button (as needed). Click the My Requirements option. Click Search.	For a selected term, a student can search for classes based on his or her degree requirements.
Add Classes - Course Detail	SSS_CRSE_OFFER_DTL	From the Add Classes – Search by My Requirements page, click a link for a course description.	Students review course details, view class sections for the selected term, and, if term activated, add a class to their shopping cart. Students can also view their course schedule and shopping cart contents for the selected term.

Viewing Advisee Information Through Self-Service Pages

Bundle 36. New pages added for Advising Notes.

This section lists the pages used to view advisee information using self-service pages.

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

Pages Used to View Advisee Information Through Self-Service

Page Name	*Definition Name*	*Navigation*	*Usage*
My Advisees	SSS_ADVISEE_LIST	Self Service, Advisor Center, My Advisees	Bundle 36. Advising Notes functionality. An advisor can view a list of his or her advisees and access other academic and personal information about them, for example, class schedules, term progress, transfer credit reports, transcripts and advising notes.
Bundle 36. New page. Advising Notes	SAA_SS_ADVNOTE_STU	Self Service, Advisor Center, My Advisees. Click the Advising Notes icon for the respective advisee.	View all advising notes for the selected student, irrespective of who created them.
Bundle 36. New page. Advising Notes	SAA_SS_ADVNOTE_ADD	Self Service, Advisor Center, My Advisees. Click the Advising Notes icon for the respective advisee. Click the create a note button.	Create an advising note for the selected advisee.
Bundle 36. New page. Advising Notes	SAA_SS_ADVNOTE	Self Service, Advisor Center, My Advisees. Click the Advising Notes icon for the respective advisee, and again, click the specific Advising Note icon to view details.	View and update an advising note for the selected advisee. Add or remove attachments to the note. Advisors can create or delete related action items. Update note details including advisee access to the note. Send notifications to the advisee with an editable message.
Bundle 36. New page. Advising Notes	SAA_SS_ADVNOTE_SUM	Self Service, Advisor Center, My Advisees. Select the my advising notes button	View notes that have been created by or assigned to an advisor. Use filters to search for specific notes.

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

Page Name	*Definition Name*	*Navigation*	*Usage*
Advisee's Student Center (search)	SSS_ADVISEE_LIST	Click the View Data for other Students button on the My Advisees page.	Bundle 36. Advising notes functionality. An advisor can search for an advisee or prospective student and then go to the Advisee Student Center for the selected advisee or prospective student. From the Advisee Student Center, the advisor can access other academic and personal information about the selected advisee or prospective student, for example, class schedules, term progress, transfer credit reports, transcripts and advising notes. If the person is a prospective student, the advisor can generate a what-if advisement report based on the prospective student's intended program of study.
My Advisees - Committee Members	SSS_ADVISEE_COMEMB	Click a committee name on the My Advisees page.	Review committee members, their roles, and their contact numbers.
Advisee Requirements	SAA_SS_DPR_ADB	Click the View Student Details link on the My Advisees page for a student in the list of advisees and on the Advisee Student Center page, under Academics, select Academic Requirement from the drop-down list. Click the Go button.	Advisors can view a student's advisement report.
Advisee Requirements - Course Detail	SSS_CRSE_OFFER_DTL	Click the course description link on the Advisee Requirements page.	Advisors can review course details and, if the student is term activated, view class sections for a specific term.

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

Page Name	*Definition Name*	*Navigation*	*Usage*
Advisee Student Center	SSS_STUDENT_CENTER	• Self Service, Advisor Center, Advisee Student Center • Self Service, Advisor Center, My Advisees Click the View Student Details link for an advisee on the My Advisees page or click the Student Center subtab.	Bundle 36. Advising notes functionality. Advisors can access an advisee's related transactions and view information such as class schedule, dates, and account information. Advisees can select Advising Notes from the Academic drop down list to view their notes. Based on advisee access settings, they can update advising notes, add Note items and attachments; and automatically generate notifications to the advisor when they submit an update.
What-If Report – What-if Report Selection	SAA_SS_WHATIF_SEL	On Advisee Student Center, under Academics, select What-if Report from the drop-down list box. Click the Go button.	Advisors can view an existing report or initiate the steps to create a new advisement report for a student or prospective student.
What If Report	SAA_SS_DPR_ADB	Click the report date link on the What-If Report – What-if Report Selection page.	Advisor can view a saved what-if report.
What-If Report – Create What-if Scenario	SAA_SS_WHATIF	Click the Create New Report button on the What-If Report – What-if Report Selection page.	Advisors can define a what-if scenario for the student or prospective student and generate a what-if advisement report for that individual. Depending on the setup, the advisor may also be able to define a course what-if scenario.
What If Report – Select Course for What-if Scenario	SSS_BROWSE_CATLG	Click the Browse Course Catalog button on the Create What-if Scenario page.	Advisors can select courses for the what-if scenario.
Advisee Assignments	SS_LAM_STD_GR_LST	On Advisee Student Center, under Academics, select Assignments from the drop-down list box. Click the Go button.	Advisors can view advisee's assignments and grades.
Advisee Course History	SSS_MY_CRSEHIST	On Advisee Student Center, under Academics, select Course History from the drop-down list box. Click the Go button.	Advisors can view advisee's course history.

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

Page Name	*Definition Name*	*Navigation*	*Usage*
Advisee Exam Schedule	SSR_SSENRL_NODATA	On Advisee Student Center, under Academics, select Exam Schedule from the drop-down list box. Click the Go button.	Advisors can view advisee's exam history.
Advisee Grades	SSR_SSENRL_GRADE	On Advisee Student Center, under Academics, select Grades from the drop-down list box. Click the Go button.	Advisors can view an advisee's grades.
Advisee Unofficial Transcript	SSS_TSRQST_UNOFF	On Advisee Student Center, under Academics, select Transcript: View Unofficial from the drop-down list box. Click the Go button.	Advisors can view an advisee's unofficial transcript.
Advisee Transfer Credit	SCC_SUM_TRNSFRCRT	• Self Service, Advisor Center, Advisee Transfer Credit • Self Service, Advisor Center, My Advisees Click the View Student Details link for an advisee. Click the Transfer Credit subtab. • On Advisee Student Center, under Academics, select Transfer Credit: Report from the drop-down list box. Click the Go button.	Advisors can view information such as advisees's course and test credits.
Advisee General Info (general information)	SCC_SUM_PERSONAL	• Self Service, Advisor Center, Advisee General Info • Self Service, Advisor Center, My Advisees Click the View Student Details link for an advisee. Click the General Info subtab.	Advisors can view information such as an advisee's service indicators, initiated checklists, personal data, and student groups.

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

Page Name	*Definition Name*	*Navigation*	*Usage*
Advisee Academics	SCC_SUM_ACADEMICS	• Self Service, Advisor Center, Advisee Academics • Self Service, Advisor Center, My Advisees Click the View Student Details link for an advisee. Click the Academics subtab.	Advisors can view information such as an advisee's career, program, and term summary.
Degree Progress Report	SS_ES_AARPT_TYPE	On Advisee Student Center, select Degree Progress Report from the drop-down list box. Click the Go button.	Advisors can view or generate an advisee's degree progress report (that is, advisement transcript). Note: This is not the default option. Institutions must change component permissions to enable users to view or generate the advisement transcripts.
Quick What-If Analysis Report	SA_REQST_DTL_SEC3	Click the Quick What-If button on the Degree Progress Report page.	Advisors can run a quick what-if scenario for their advisees (on an advisement transcript). Note: This is not the default option. Institutions must change component permissions to enable users to view or generate the advisement transcripts.
Course List What-If Analysis	SA_REQ_CRSE_WHIF2	Click the Course List What-If button on the Degree Progress Report page.	Advisors can run a course list what-if scenario for their advisees (on an advisement transcript). Note: This is not the default option. Institutions must change component permissions to enable users to view or generate the advisement transcripts.
Emergency Contacts List	SS_CC_EMRG_CNTCT_L	On Advisee Student Center, under Personal Information, select Emergency Contact.	Advisors can view an advisee's emergency contact information.
Enrollment Dates	SSR_SSENRL_APPT	On Advisee Student Center, under Enrollment Dates, select *details*.	Advisors can view an advisee's enrollment appointments.

 Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

Page Name	*Definition Name*	*Navigation*	*Usage*
Send Notification	SSS_NOTIFY	Advisor Center, My Advisees Select the Notify Selected Advisees or Notify All Advisees button.	Advisors can send notifications to their advisees.
Advisee To Dos	SS_CC_TODOS	On Advisee Student Center, under To Do List, select *details.*	Advisors can view an advisee's to do list summary.
Advisee Class Schedule, Weekly Calendar View	SSR_SS_WEEK	• On Advisee Student Center, under Academics, select My Class Schedule. • On Advisee Class Schedule, select the Weekly Calendar View.	Advisors can view an advisee's weekly schedule.
FERPA Message for Instructor/Advisor	SSR_FERPA_STMNT	Click View FERPA Statement link from any of the Advisor Center subtabs.	Advisors can view the FERPA restrictions and link to the U. S. Department of Education Family Educational Rights and Privacy Act.

Viewing Self-Service Advisement Transcripts

The self-service Degree Progress Report feature enables students and advisors to process and then view advisement reports (that is, advisement transcripts) that your institution defines for self-service processing. Users of this feature can conduct what-if scenarios and can explore the course requirement consequences of completing additional coursework or of changing the student's program of study.

This section lists prerequisites and lists the pages used to perform self-service advising.

See Applying for Graduation Using Self-Service Pages.

Prerequisites

Before individuals at your institution can use the self-service Degree Progress Report (advisement transcript) feature, you must:

- 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.
- Turn off security to the component, SAA_SS_DRP_ADB.

Related Links

"Defining Transcript Types (PeopleSoft Campus Solutions 9.0: Student Records)"

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.

Pages Used to View Self-Service Advisement Transcripts

Page Name	*Definition Name*	*Navigation*	*Usage*
Degree Progress Report	SS_ES_AARPT_TYPE	Self Service, Degree Progress/Graduation, View Degree Progress Report	Students and advisors can 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 subplan.
Report Results	SS_REPORT_RESULT_A	• Self Service, Degree Progress/Graduation, View Degree Progress Report, Report Results • Self Service, Academic Records, View Unofficial Transcript, Report Results	Students and advisors can view the advisement transcript.
View Previously Requested Reports	SS_STUREQ_RSLT	Click the View a Report that you had previously requested link on the Degree Progress Report page or the Unofficial Transcript page.	Students and advisors can 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 button on the Degree Progress Report page.	Students and advisors can enter hypothetical career, program, subplan, and requirement term information. Students or advisors must enter a required term for every career, program, plan, or subplan 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 can 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 can select courses for the Course List Analysis report.

Copyright © 1988, 2015, Oracle and/or its affiliates. All rights reserved.