Setting Up Academic Advisement Self-Service

Setting Up Self-Service Features for Academic Advisement

To set up self-service Academic Advisement features, use the Academic Advising setup (SAA_SS_RPT_OPT) component.

This section discusses how to define Academic Advisement setup and Advising Notes Categories and Subcategories.

Pages Used to Set Up Self-Service Features for Academic Advisement

Bundle 36. New pages for Advising Notes functionality.

Page Name	*Definition Name*	*Navigation*	*Usage*
Bundle 36. Advising Notes options added. Academic Advising Setup	SAA_SS_RPT_OPT	Set up SACR, Common Definitions, Self Service, Academic Advising	Enable self-service features and define behavior for self-service Academic Advisement functionality.
Bundle 36. New page. Note Category Table	SAA_NOTE_TYPE_TBL	Set up SACR, Product Related, Academic Advisement, Note Category Table	Update and maintain Advising Notes categories.
Bundle 36. New page. Note Subcategory Table	SAA_NOTE_STYPE_TBL	Set up SACR, Product Related, Academic Advisement, Note Subcategory Table	Update and maintain Advising Notes subcategories.

Defining Academic Advisement Setup

Bundle 36. Added Advising Notes functionality.

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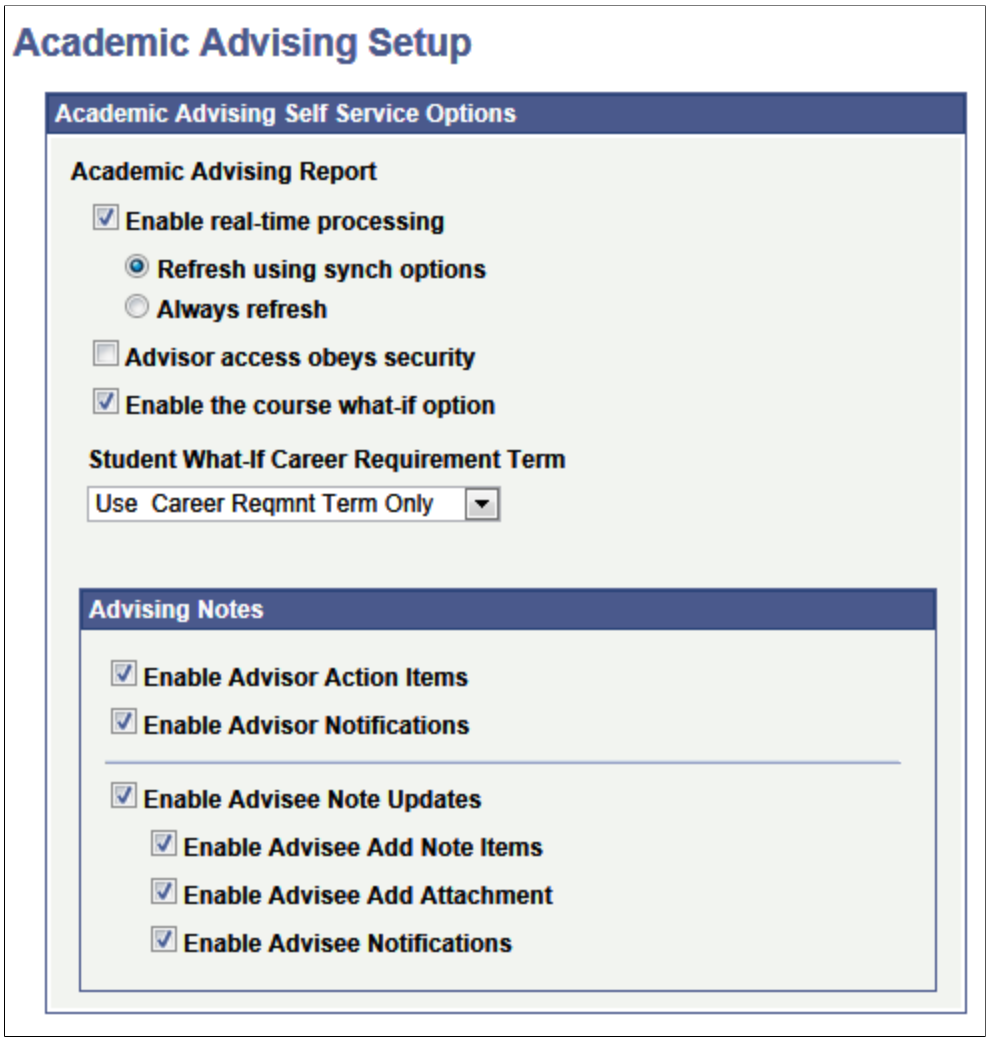
Access the Academic Advising Setup page (Set Up SACR, Common Definitions, Self Service, Academic Advising).

Image: Academic Advising Setup page

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



Enable real-time processing

Select to instruct the system to automatically generate an advisement report when students access the My Academic Requirements page.

Use the two radio buttons to indicate that your institution wants to use real-time processing with or without synchronization options (also referred to as triggers).

If you enable real-time processing and select *Always refresh,* then the system will regenerate a report when the student accesses My Academic Requirements, Search by My Requirements, or Plan by My Requirements. That is, the report is regenerated regardless of whether anything changed on the student's record.

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Note: On the administrative side, the system will also regenerate the report if the user accesses a previously run report and, from the Report Request page, clicks the View Report link.

Advisor access obeys security

Select to use the Advisement Report Security component to manage advisors' ability to view the advisement reports of their advisees in self service. By default, this check box is cleared, and advisors may view all advisement reports that have been generated for their advisees, regardless of their institution. Remember that the advisement reports that advisors access from My Advisees are those defined in the Student Academic Requirement Report field on the Academic Institution 7 page.

Enable the course what-if option

Select to enable students to run a course what-if scenario in self-service using the What-If Report – Create What-if Scenario (SAA_SS_WHATIF) page. Clear the check box to disable this ability.

Student What-If Career Requirement Term

This field is for use with the What-If Report – Create What-if Scenario page, which a student can use to define a what-if career scenario and generate a what-if advisement report based on his or her what-if career, program, plan, or subplan.

The field values here affect what requirement term value or values the student sees in the Catalog Year field on the What-If Report – Create What-if Scenario page.

Use Career Requirement Term Only is the default value. By default, the term value that the Catalog Year field displays on the Create What-if Scenario page is the student's career requirement term. If a student has no career requirement term, the field displays the student's primary program requirement term. With this selection, the Catalog Year field is not editable by the student.

If you want to enable students to change the Catalog Year field value (that is, the career requirement term value to be used in the what-if audit), select the *Use Term Table Setup* field value. You can then define valid begin and end dates on the Term Table page. With this option, you control (using begin and end dates) the (requirement) terms available to the students when they define their what-if career scenario.

Bundle 36. Advising Notes setup.

Advising Notes

Enable Advisor Action Items

If enabled, the Action Items region is displayed and the column is included in Advising Notes lists. This is an initial setup value because turning off this feature would make existing data inaccessible.

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Enable Advisor Notifications If enabled, the notify advisee button is displayed.

Enable Advisee Note Updates If enabled, the update note button is displayed. Disabling Advisee Note Updates disables all the following advisee features:

- Enable Advisee Add Note Items—the advisee can add note items such as comments.
- Enable Advisee Add Attachment—the advisee can add or delete attachments to the note but cannot delete the advisor's attachments.
- Enable Advisee Notifications—the advisor is automatically notified when the advisee submits an update.

Defining Note Categories

Bundle 36. New page.

Use this page to view and define Advising Note categories for your institution. You can create long and short descriptions for each category and change its active status.

Access the Note Category Table page (Set Up SACR, Product Related, Academic Advisement).

Defining Note Subcategories

Bundle 36. New page.

Use this page to view and define Advising Note subcategories for your institution. Subcategories are child values of Note categories. You can create long and short descriptions for each subcategory and change its active status.

Access the Note Subcategory Table page (Set Up SACR, Product Related, Academic Advisement).

Related Links

"Defining Terms, Sessions, and Session Time Periods (PeopleSoft Campus Solutions 9.0: Application Fundamentals)"

"Understanding Academic Requirement Groups (PeopleSoft Campus Solutions 9.0: Academic Advisement)"

Viewing Advisee Information Through Self-Service Pages

"Creating and Managing Advising Notes (PeopleSoft Campus Solutions 9.0: Academic Advisement)"

Defining Self-Service Installation Settings

To define conditions under which an advisement report is generated for self service, use the Academic Advisement installation component (SAA_INSTALL_AA).

This section discusses how to define installation settings for Academic Advisement.

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Page Used to Define Self-Service Installation Settings

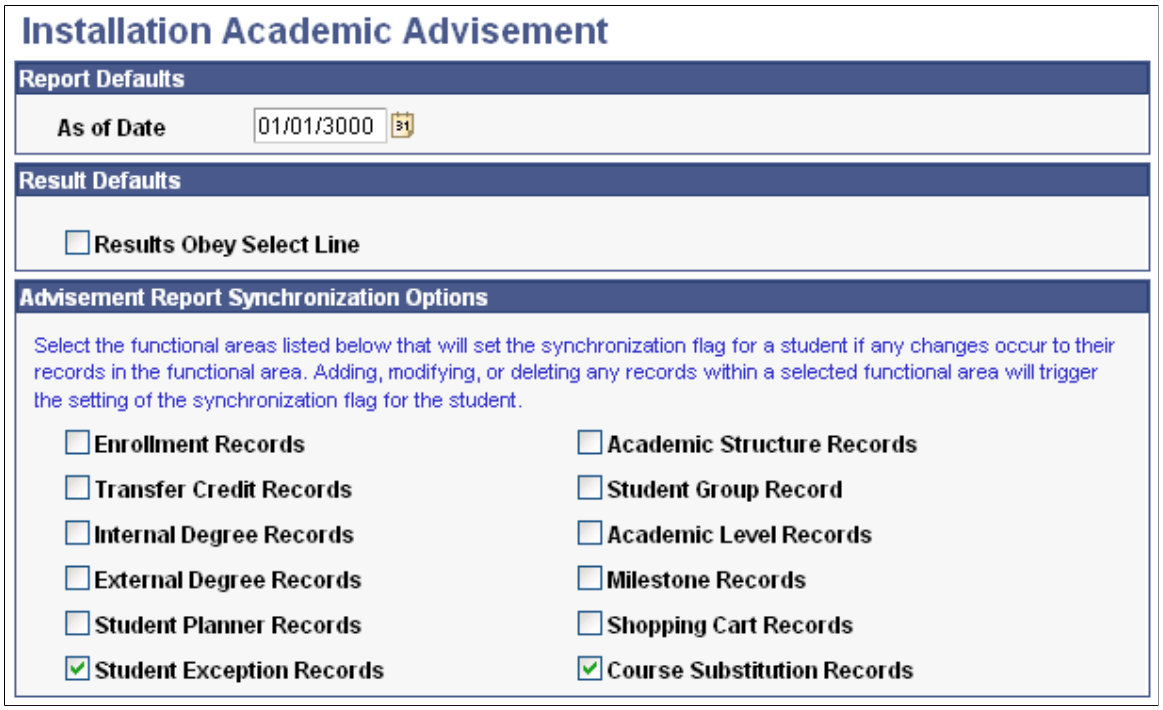
Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Academic Advisement	SAA_INSTALL_AA	Set Up SACR, Install, Academic Advising Installation, Installation Academic Advisement	Disable on-demand report processing and enable the system to track which students need to have new reports generated, based on changes made to their academic history.

Installing Self-Service Academic Advisement

Access the Installation Academic Advisement page (Set Up SACR, Install, Academic Advising Installation).

Image: Installation Academic Advisement page

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



The check boxes on this page determine under which conditions a student's academic history will cause the system to generate an advisement report for a student. If the institution has enabled real-time processing (on the Academic Advising Setup page) and selected check boxes on this page, a new advisement report will be generated when a student accesses the My Academic Requirements page. If the institution has not enabled real-time processing, the institution can use the conditions to "trigger" a batch process to run and generate advisement reports at predefined intervals. To run the advisement reports in batch based on these synchronization options, your institution will use the Generate Report Requests (SAA_RC_RPTRQST) and Generate Advisement Reports (SAA_RC_RPTGEN) components.

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Selecting a check box causes the system to set a synchronization (sync) flag for that change. In turn, the flag cues the institution to rerun the advisement report. Here are the actions for each check box that set a sync flag:

Enrollment Records	Adding, deleting, or modifying any enrollment records through Enrollment, Enrollment Requests, Quick Enrollment, or Grading.
Transfer Credit Records	Posting or unposting any transfer credit.
Internal Degree Records	Awarding, revoking, or modifying any degree record through the Student Program/Plan, Degree Maintenance, or Batch Graduation Processing pages.
External Degree Records	Adding, modifying, or removing any externally awarded degrees through the External Education pages.
Student Planner Records	Adding, modifying, or removing any records from the student's planner.
Academic Structure Records	Adding, modifying, or removing any values from the student's Records Program stack. This also includes admissions matriculation.
Student Group Record	Adding, modifying, or removing any advisement student group values for a student.
Academic Level Records	Making any changes to a student's academic level, either by automated processes from grading and enrollment or through manual override in term processing.
Milestone Records	Adding, modifying, or removing any milestone values for a student.
Shopping Cart Records	Adding, modifying, or removing any records in the student's Shopping Cart.
Student Exception Records	Reprocessing when a student override is made. Specifically, the flag is set when any of the following types of student-based exceptions are created: course directive, requirement change, waiver, or override. The flag is also set when there is any change made to such an exception, whether it is a change to the description or to the override detail itself.
Course Substitution Records	Reprocessing when a course substitution is made using the Create Course Substitution component (STDNT_CRS_SUBS). The flag is also set when there is any change made to the component, whether it is a change to the long description or to the substitution detail itself.

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Example

An institution selects the *Enrollment Records* check box. A student has an advisement report dated May 10, 2006. The current date is July 18, 2006 and the student has just enrolled in a summer school class. The change to the student's enrollment record sets a synchronization flag. The institution nightly runs a batch process to generate new advisement reports for students for whom the synchronization flag is set to "Y." On the following day, the student looks at his My Academic Requirements page. The advisement report that appears there will be up to date (with a date and time stamp as of the previous night's batch process).

Alternatively, if the institution has selected the Enable real-time processing check box on the Academic Advising Setup page, then when student enrolls in a class then the system automatically generates the report to automatically (in real time) when the student next accesses the My Academic Requirements page. The student will immediately see the course he's just enrolled in.

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