CHAPTER 1

Setting Up Optional Advisement Data

This chapter discusses how to:

• Set up grade category values.
• Set up cumulative grade point average (GPA) values.
• Set up special requirement usage values.
• Set up valid student groups.
• Set up report identifiers.
• Define default course what-if grades.

Bundle 15: section added
• Set up tests for use in Academic Advisement.

Setting Up Grade Category Values

To set up grade category values, use Grade Category component (GRADECATEGORY).

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

See Also

[ssr, Setting Up Grading, Setting Up Your System for Grading, Defining Grading Schemes
Setting Up Academic Requirements, Setting Up Requirement Line Item Detail]
Page Used to Set Up Grade Category Values

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade Category Table</td>
<td>GRADE_CATEGORY</td>
<td>Set Up SACR, Product Related, Student Records, Grading, Grade Category</td>
<td>Establish new grade category prompt values that can be assigned in the Grading Scheme table and then used as field values for derived lists at the line item detail level. On the Requirement Line Item Detail page, if the line detail type is DLST, then one of the List Recall Mode field values is Grade Category.</td>
</tr>
</tbody>
</table>

Entering Grade Category Values

To set up grade category tables, use the Grade Category component (GRADE Categoria). Access the Grade Category Table page.

Important! Set up one grade category for every setID at your institution. For every table and effective-dated row that you create, include a grade category of None. Because Grade Category is a required field in the Grading Scheme table, you can use a field value of None in the Grading Scheme table for those grades that do not need a particular value.

Grade Category

Enter the grade category that will become a prompt value on the Line Item Detail page and on any Student Record pages that contain this field. Because values are effective-dated, only those values that are valid as of the effective date are included in any prompting action.

Description

Enter the grade category description that will appear when a field is prompted for field values. The system populates the grade category description by default. However, you can change this value. All alphanumeric characters are valid.

Clearly describe the grade category value. For example, you might want to describe a grade category of TXFR as Transfer Pass. In that case, the prompt value appears as Transfer Pass.
Example

At PSUNV, the total number of pass grades that can be counted toward a bachelor’s degree is limited to 24 units. In addition, the total number of pass grades that can be transferred from a community college toward a bachelor’s degree is limited to 6 units. A total of 24 pass units is allowed, but only 6 or fewer of those units can be from another institution.

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

In Academic Advisement, you next create a requirement that is a global limit. It points to all courses on a student’s transcript with a grade that has a grade category of P combined with TP (line detail type of DLST with a list recall mode of Grade Category = P U line detail type of DLST with a list recall mode of Grade Category = TP) on the Requirement Line Item Detail page. The limit allows a maximum of 24 units.

You then create a second requirement that is also a global limit, which points to all courses on a student’s transcript with a grade that has a grade category of TP (line detail type of DLST with list recall mode of Grade Category = TP). This second requirement allows a maximum of 6 units. Any courses over the limit of allowed credits are not counted toward the degree.

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

Setting Up Cumulative GPA Values

To set up cumulative GPA values, use the Cum. Grade Point Average component (CUMULTV_GPA). This section discusses how to enter cumulative GPA values.

Page Used to Set Up Cumulative GPA Values

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cum. Grade Pt. Average Table (cumulative grade point average table)</td>
<td>CUMULTV_GPA</td>
<td>Set Up SACR, Product Related,</td>
<td>Establish new cumulative GPA prompt values for the cumulative GPA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Student Records, Grading, Cum.</td>
<td>field value, which can be used as a precondition or condition</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Grade Point Average</td>
<td>throughout academic advisement. These values also appear on certain</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>advisement reports.</td>
</tr>
</tbody>
</table>

Entering Cumulative GPA Values

Access the Cum. Grade Pt. Average Table page.
Cum. Grade Pt. Average Table

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>Cumulative GPA</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSUUNV</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td></td>
<td>0.5</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>1.0</td>
<td>1.0</td>
</tr>
<tr>
<td></td>
<td>1.5</td>
<td>1.5</td>
</tr>
<tr>
<td></td>
<td>2.0</td>
<td>2.0</td>
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<tr>
<td></td>
<td>2.5</td>
<td>2.5</td>
</tr>
<tr>
<td></td>
<td>3.0</td>
<td>3.0</td>
</tr>
<tr>
<td></td>
<td>3.5</td>
<td>3.5</td>
</tr>
<tr>
<td></td>
<td>4.0</td>
<td>4.0</td>
</tr>
</tbody>
</table>

Each cumulative GPA prompt value is associated with only one academic institution. This field is used for prompting, not for analysis.

Enter the cumulative GPA that is a prompt value for preconditions or conditions of cumulative GPA. Values are 0 through 9, with a maximum of five positions to the left of the decimal point and three positions to the right of the decimal point (for example, 12345.678).

Enter the cumulative GPA description that will appear when a field is prompted for field values. By default, the system populates the Description column with the cumulative GPA value. However, you can change this value. All alphanumeric characters are valid.

Clearly describe the cumulative GPA value. For example, you might want to describe a cumulative GPA of 2.0 as *C average*. In that case, the prompt value appears as *C average*.

Setting Up Special Requirement Usage Values

This section provides an overview of special requirement usage values and discusses how to enter requirement usage values.

**Understanding Special Requirement Usage Values**

In most cases, you will probably run academic advisement reports for your students. These reports track students’ progress toward graduation based on their career, program, plan, subplan, and requirement term data.
However, in some instances you want to evaluate a group of students based on a different set of criteria. Perhaps you want to evaluate the semester grade point average and academic load for all students in a student group called *Athlete*. Perhaps you want to evaluate the GPA of course work in Accounting 1a and Accounting 2a for all pre-business majors to identify those with high grades and to inquire if they are interested in pursuing a degree in the accounting program. You can do either evaluation by creating special academic requirement groups that reference a user-defined requirement usage. The system does not include academic requirement groups with a special requirement usage in general advising reports; the special requirement groups are used only by specially designed transcript type reports that you configure.

**Note.** The system can process a maximum of 30 special requirement groups that the system can process for a single report request. In addition, for special *usage* requirement groups, the system does not reference the career, program, plan, subplan, and precondition fields to determine which requirement groups apply to each student. Therefore, when creating special usage requirement groups, keep in mind that the system will attempt to apply all requirement groups with the special usage that you define to all students in the batch. If the number of active academic requirement groups with the special usage exceeds 30, the process will fail.

To set up special usage values:

1. Use the Requirement Usage page to define a special usage value.
   All user-defined usage values must be four characters (for example, ACCT). The first and last characters cannot be spaces. Usage values that are delivered with the system are three characters (for example, STD and ADV).

2. Use the Requirement Group page to create an academic requirement group, which may reference one or more academic requirements, and specify the special usage value in the Usage field.
   You can assign usage values at the requirement group level only.

3. Use the Basic Data page to create a transcript type that references the special usage value.
   Select the Special Advising Report check box and enter the special usage in the Requirement Usage field.

4. Run the report.
   - To run the report for a small group of students by ID, specify the transcript type, which you defined in step 3, on the Request Header page and enter all IDs on the Request Detail page.
   - To run the report for a large group of students by parameters, specify the transcript type, which you defined in step 3, on the Transcript request page and enter the parameters that capture your target population.

**See Also**

[lsaa, Setting Up] Optional Advisement Data, Setting Up Special Requirement Usage Values

[Setting Up Academic Requirement Groups, Setting Up a Requirement Group]

[lssr, Setting Up] Transcripts, Defining Transcript Types, Defining Transcript Type Basic Data

[lssr, Producing] Transcripts, Using the XML Transcript Template, Understanding the XML Transcript Template

[lssr, Producing] Transcripts, Processing Batch Transcripts
Page Used to Set Up Special Requirement Usage Values

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requirement Usage</td>
<td>RQRMNT_USEAGE</td>
<td>Academic Advisement, Academic Requirements, Define Requirement Usages</td>
<td>Create special usage field values for generating alternate report formats.</td>
</tr>
</tbody>
</table>

Entering Requirement Usage Values

Access the Requirement Usage page.

**Requirement Usage**

**Effective Date**

Enter an effective date for this requirement usage. The effective date defines when the status that you select is valid. If any of the requirement usage information changes, you should add a new effective-dated row. When you create an academic requirement group that references this requirement usage, the effective date of the requirement usage must be less than or equal to the effective date of the academic requirement group.

**Status**

Select the status of the requirement usage. Values are:

- **Active**: Select to add a new requirement usage.
- **Inactive**: Select only if your institution will no longer use this requirement usage. If any of the requirement group information changes, you should add a new effective-dated row.
Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Enter a description to use as a search key and to appear in prompts for requirement usage values. The description should accurately describe the requirement usage so that the label is meaningful as a search key. For example, a description of *Phi Beta Kappa* helps to identify this requirement. The short description appears only on this page. The long description appears on the advising report.

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

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## Setting Up Valid Student Groups

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

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

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

See **sss, Setting Up Academic Advisement Self-Service**

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

### Page Used to Define Valid Student Groups

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Valid Student Groups</td>
<td>SAA_VALID_STDNT_GR</td>
<td>Set Up SACR, Product Related, Academic Advisement, Advising Student Groups</td>
<td>Enter student groups for use in Academic Advisement and real-time processing.</td>
</tr>
</tbody>
</table>

### Defining Valid Student Groups

Access the Define Valid Student Groups page.
Define Valid Student Groups

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>PSUNV</th>
<th>PeopleSoft University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>01/01/2004</td>
<td></td>
</tr>
</tbody>
</table>

**Effective Date**

Enter the date for which the student group is effective.

**Student Group**

Enter the valid student group or groups for the assigned effective date.

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Setting Up Report Identifiers

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

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

This section discusses how to define the report identifier.
Page Used to Set Up a Report Identifier

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Report Identifier</td>
<td>SAA_RPT_IDENT_TBL</td>
<td>Academic Advisement, Academic Requirements, Define Report Identifier</td>
<td>Enter the report identifier for a set of requests to be created, processed, or purged.</td>
</tr>
</tbody>
</table>

Defining the Report Identifier

Access the Define Report Identifier page.

![Define Report Identifier page]

**Effective Date**

Enter an effective date to define when the status that you select is valid.

**Status**

Select the status of the report identifier. Values are.

- **Active**: Select when adding a new report identifier.
- **Inactive**: Select only if your institution will no longer use this report identifier.

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

**Description and Long Description**

Enter a description of the report identifier that is meaningful as a search key. This description appears in search results for report identifiers. The long description is the internal description of the report identifier; it is for your institution’s reference.

See [saa, Producing Academic Advisement Reports](#).

See [saa, Managing Batch Academic Advisement Reports, Purging Academic Advisement Reports, Purging Academic Advisement Report Results](#).
Setting Up Optional Advisement Data

Chapter 1

Defining Default Course What-If Grades

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

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

See ssr, Setting Up Grading.

Bundle 15: this section is new

Setting Up Tests for Use in Academic Advisement

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

Page Used to Set Up Tests for Use in Academic Advisement

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Tests for Advisement</td>
<td>SAA_COND_TEST</td>
<td>Set Up SACR, Product Related, Academic Advisement, Define Tests for Advisement</td>
<td>Set up test information for use in preconditions and conditions in academic requirements and academic requirement groups.</td>
</tr>
</tbody>
</table>

Defining Tests for Use in Academic Advisement

Access the Define Tests for Advisement page.
### Define Tests for Advisement

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>PSUNY PeopleSoft University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test ID</td>
<td>ACT ACT Assessment</td>
</tr>
<tr>
<td>Requirement Usage</td>
<td>ADV Academic Advisement</td>
</tr>
<tr>
<td>Effective Date</td>
<td>08/31/2009</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
</tbody>
</table>

#### Processing Controls

- **Months Valid**: 48
- **Enable User to Override Months**: [ ]
- **Test Score Method**: Highest Score
- **Enable User to Override Method**: [ ]

#### Valid Data Sources

- **Data Source**: American College Testing
- **Data Source**: Educational Testing Service
- **Data Source**: School

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**Define Tests for Advisement page**

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

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

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**Test ID**

Select the Test ID (ACT, GMAT, GRE for example) that you want to use in Advisement. This field prompts on the values previously defined in the Test Tables component. This field is unavailable for entry unless you are in Add mode.

**Requirement Usage**

Select the value that specifies how this requirement is applied. This field is unavailable for entry unless you are in Add mode.

**Status**

Select the status of the report identifier. Values are:

- **Active**: Select when adding a new report identifier.
- **Inactive**: Select only if your institution will no longer use this report identifier.

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

Enter the number of months for which a test score can be considered valid. An empty (blank) field is interpreted to mean that the test is always valid.

**Test Score Method**

Select a default value to be used when you use this test ID in preconditions and conditions. (On this same page, you can enable users to override this default value when the field appears in the Academic Requirement Group, Academic Requirement, , or Define Dynamic Condition components.) Values are:

- **Average of All Scores Taken**: Select to have the advisement engine average scores for a given test when it processes the test for a precondition or condition in an academic requirement or requirement group.

- **First Test Taken**: Select to have the advisement engine use the test score with the earliest date when it processes the test for a precondition or condition in an academic requirement or requirement group.

- **Highest Score**: Select to have the advisement engine use the highest score for a given test when it processes the test for a precondition or condition in an academic requirement or requirement group.

- **Last Test Taken**: Select to have the advisement engine use the score from the date of the last test taken when it processes the test for a precondition or condition in an academic requirement or requirement group.

- **Lowest Score**: Select to have the advisement engine use the lowest score for a given test when it processes the test for a precondition or condition in an academic requirement or requirement group.

**Enable User to Override Method**

Select this check box if you want to enable a user to change the Test Score Method field value when setting up a precondition or condition in the Academic Requirement Group, Academic Requirement, , or Define Dynamic Condition components. This check box label is defined in the Message Catalog. You may change this label as needed.

**Enable User to Override Months**

Select this check box if you want to enable a user to change the Test Score Method field value when setting up a precondition or condition in the Academic Requirement Group, Academic Requirement, , or Define Dynamic Condition components. This check box label is defined in the Message Catalog. You may change this label as needed.

**Data Source**

Select one or more valid data sources (American College Testing, for example) for the Test ID you are defining. Values for this field are delivered with your system as translate values. You can modify these translate values. The delivered testing agency values that appear here are American College Testing, College Board, Educational Testing Services, and Law School Admission Services. These are the data sources that the audit engine will consider as valid when processing a test score in an academic requirement or requirement group.

**See Also**

- [lsad, Setting Up](#) External Test Score Loads
- [lsaa, Setting Up](#) Academic Requirements
- [lsaa, Setting Up](#) Academic Requirement Groups