



Academic Advising Setup Guide

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Section 1 Academic Advising Setup Description:

PeopleSoft Academic Advisement enables you to track the requirements and policies that a student must satisfy in order to graduate. As a student progresses towards graduation, 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 Academic Advisement pages, this application automatically tracks a student's degree progress. 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.

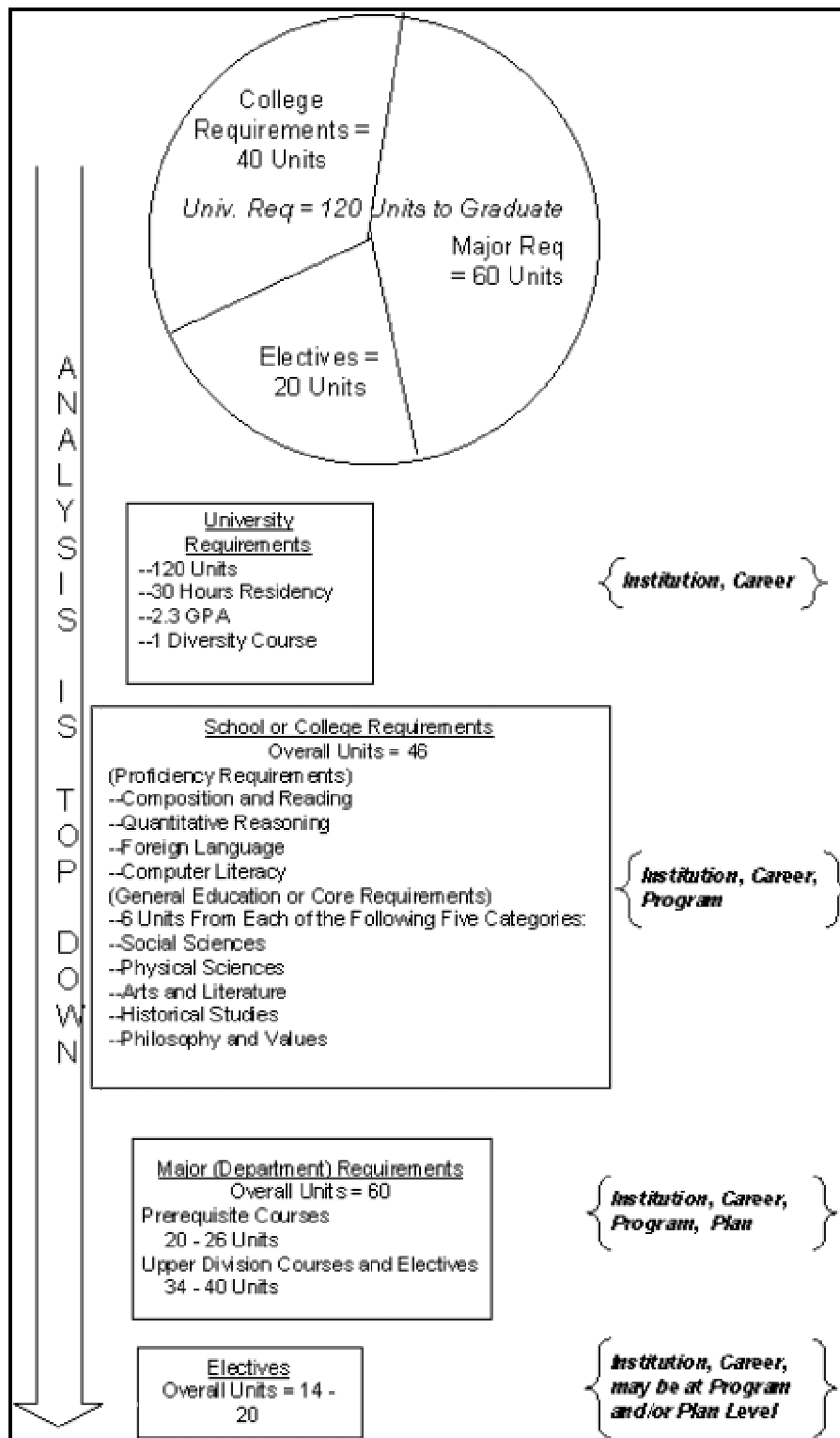
In order for you to be successful in setting up the advisement tables, you must understand all the pieces of the academic structure, what each controls and how student is attached to each one. In order for the Advising to work correctly, first you define course lists, academic requirements, and then establish requirement groups.

Section 2 Understanding the Concepts Used in Academic Advisement:

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.

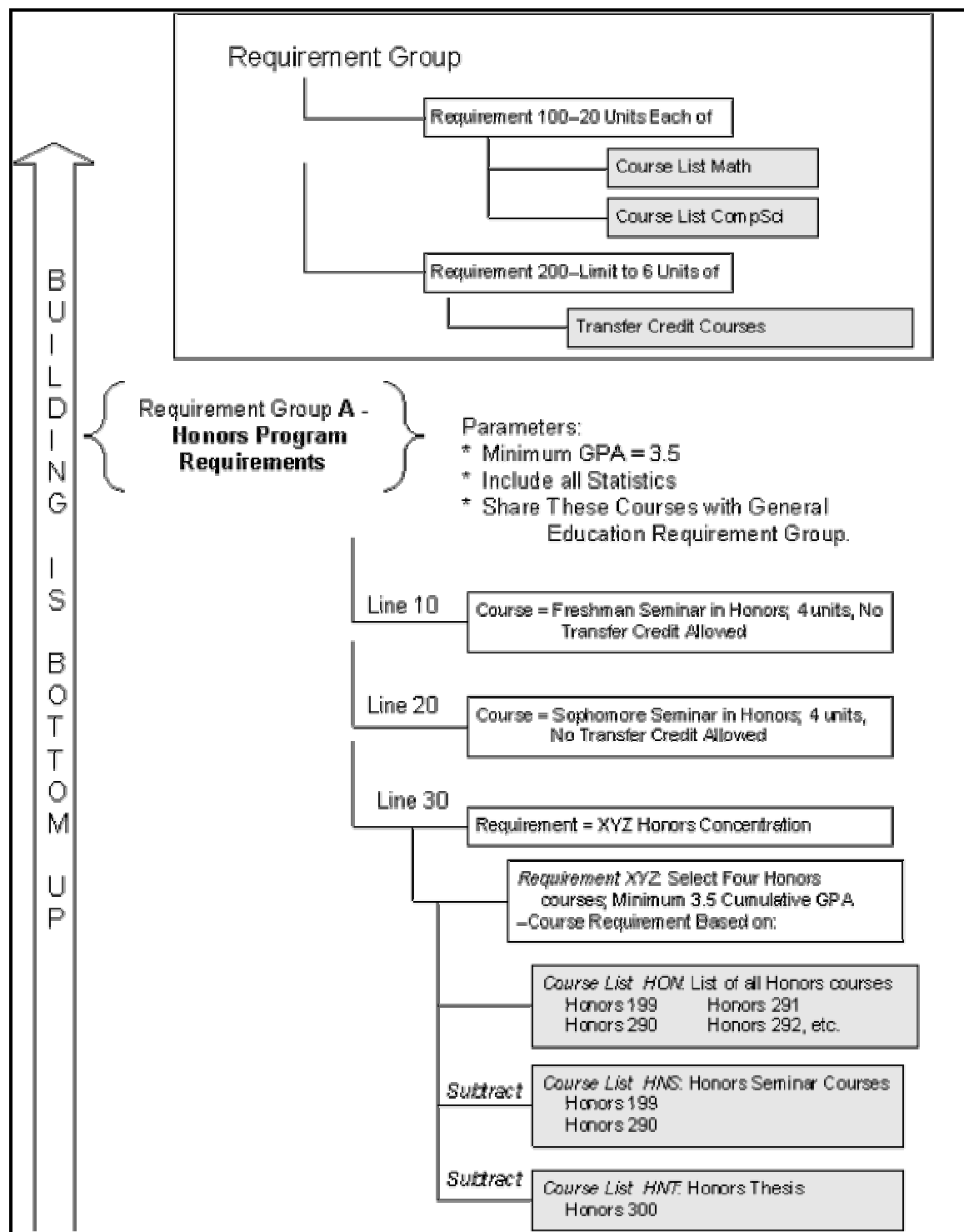
Academic requirement groups consist of academic requirements that are satisfied by course lists. Under Setup, components are listed in this order. However, in order for the Academic Advisement portion of Student Administration to work correctly, you must set up or establish the pages in the reverse order. First, define course lists, then set up academic requirements, and then establish requirement groups.

Traditional concepts of Academic Structure



Traditional Approach to Academic Advisement Concepts (Part 1)

The traditional approach to an institution is shown in the Academic Advisement Concepts (Part 1) diagram.



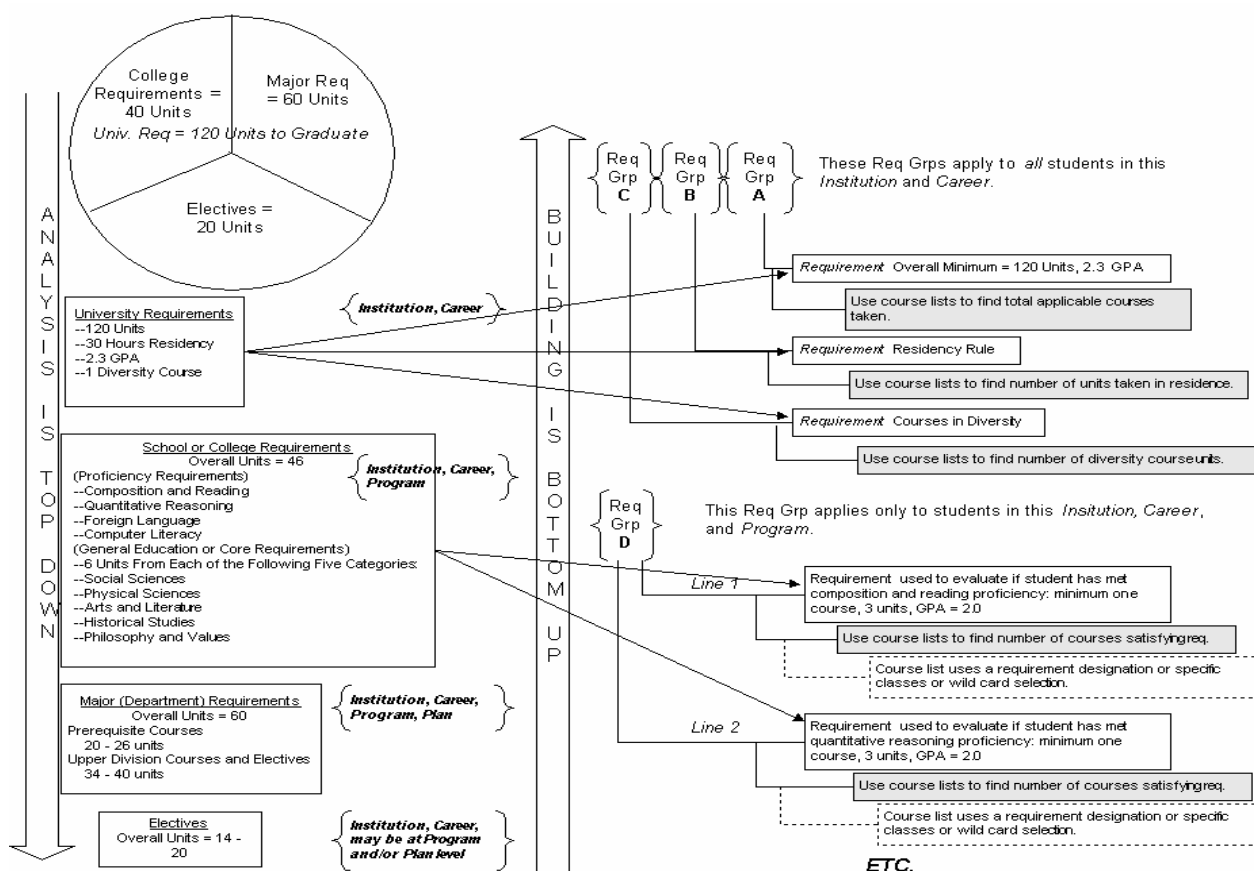
Traditional Approach to Academic Advisement Concepts (Part 2)

In the Academic Advisement Concepts (Part 2) diagram, course lists, requirements, and requirement groups are presented.

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.



Section 3 Creating Academic Course Lists:

A course list is a group of courses that can be used to satisfy an academic requirement. Course lists must be set up before academic requirements or academic requirement groups can be established.

3.1 Academic Course Lists Description

Use the Course List Description page to establish the academic institution, career, program, plan, and sub-plan information for a new course list.

Page Name: Course List Description

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Course Lists → Course List Description

3.1.1 Consideration

COPY BUTTON

Copy Button appears on the first page of the Academic Course Lists component, only in ADD mode. Course lists that are eligible to be copied are academic course lists with a *Usage* of **Academic Advisement** and enrollment course lists.

Because the Academic Course List pages are more complex than the Enrollment Course List counterparts, copying from enrollment to advisement pages is not possible. Course lists with a *Usage* of **Requisite/Restriction** may only be copied as requisite restrictions. These course lists cannot be copied and then saved with any *Usage* other than **Requisite/Restriction**. Course lists with a *Usage* of **Student Individualized Plan** cannot be copied.

If you use the copy feature to create a new course list, you will not be able to assign a specific course list number to the new list. When you save after clicking 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 click the **Copy** button. Instead, create the new course list by retyping all the field values.

USAGE

Select a Usage that indicates how data in your course list will be used. PeopleSoft delivered System default is **Academic Advisement**. Usage values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming effort.

PeopleSoft delivered values are:

Academic Advisement: The data recorded on this page is used during the degree audit process.

Student Individualize Plan: 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.

Usage values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming effort.

DESCRIPTION

The description you enter will appear in the Academic Requirements/List Item Detail when you link the course list.

3.1.2 Recommendation

Type descriptive information in the description fields. The descriptions are useful for documentation or prompting purposes, as well as for searching purposes. For example, you will likely create a number of course lists. It is recommended to employ a standard for descriptions that can be useful in searching. If you have a course list for all your Business School courses, then separate course lists for Finance, Business Economics, and Finance and Business Economics combined, you may wish to standardize your descriptions. E.g.,

Course List Number	Descr Field
21	Bus-All
15	Bus-Finance
36	Bus-Bus Econ
45	Bus-Finance + Bus Econ

Academic Career/Program/Plan/Sub-Plan fields – enter values on the fields based on your course list requirements. When you perform a search for course lists, make sure you filled-in the appropriate field(s) in the “Find an Existing Value” page. If you do not have the right values on the field (s), the course list might not display after you perform the search.

3.2 Academic Course List Details

Use the Course List Detail page to establish exactly which courses comprise the course list.

Page Name: Course List Details

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Course Lists → Course List Detail

3.2.1 Consideration**COURSE SEQUENCE**

Course Sequence is used for 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 using a **Line Type** of **Sequential Restriction or Global Sequential Restriction** on the Line Item page for Academic Requirement. However, if sequence order is important and the **Line Type** is **Sequential Restriction**, enter the correct course order here so that the student must take the courses in the specified order. For example, Spanish 1, Spanish 2, and Spanish 3 should be taken in that order. Sequentially order these courses using this page.

COURSE ID

Enter the Course ID for each course needed to complete the course list. If a course ID contains multiple offerings, any of the offerings attached to that course ID will satisfy 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

Select Include Equivalent Courses check box if courses that are equivalent to the selected course can be used to satisfy this requirement.

If the **Include Equivalent Courses** check box is not selected, the following additional fields are available:

Enter the **Term**, which the student must take this course in order for the course to be used in this course list.

Enter the **Associated Class** number that links all class sections that constitute a single course offering. Associated class number 9999 cannot be selected since this special case cannot be graded.

Enter the **Topic ID** that enables you to associate different course topics with various sets of meetings. It prompts from the topics defined in the course catalog.

The additional fields narrow the selection to a specific term, sections within a term, and/or a specific course. For example, if **Term**, **Associated Class**, and **Topic ID** are left blank, then only the specified course ID satisfies the requirement. When a term is specified, then only the course ID taken in this term meets the requirement. All three fields operate as independent filters for the course ID. If both a term and topic ID are supplied, then only the specified course ID taken during that term with that topic ID satisfies the requirement. If a term, associated class number, and topic ID are supplied, then the course ID must be taken in the specified term with the specified associated class number and topic ID.

WILD CARD INDICATOR

If the WildCard Indicator box is not selected, **Course ID** field will be used to specify the individual courses. You can wild card any position in the field. When using wild cards, equivalent courses are not checked. If the **WildCard Indicator** box is selected, **Academic Group**, **Subject** and **Catalog Number** fields are available for you to select the values.

If you select the **WildCard Indicator** box the following fields are available:

The screenshot shows the 'Academic Course Lists' setup interface. The 'Course List' is '000000000' and the 'Effective Date' is '08/28/2002'. The 'Status' is 'Active'. The 'Course Sequence' is '1'. The 'WildCard Indicator' checkbox is checked. Below this, the 'Academic Institution' is 'California State Univ Fresno'. The 'Academic Group', 'Subject', and 'Catalog Nbr' fields are highlighted with a red circle. The 'Academic Group' field has a search icon. The 'Subject' and 'Catalog Nbr' fields also have search icons. The 'Save' button is at the bottom left, and the 'Add', 'Update/Display', 'Include History', and 'Correct History' buttons are at the bottom right.

CATALOG NUMBER

The Catalog Number naming convention is that alpha characters cannot 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.

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).

Catalog Number	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.

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.

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.

3.3 Academic Course List Parameters

Use the Course List Parameters page to establish the detail parameters for each course contained in the course list.

Page Name: Course List Parameters

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Course Lists → Course List Parameters

PEOPLESoft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Course Lists [New Window](#)

Course List Description Course List Detail Course List Parameters

View All 1 of 1

Course List: 000000000 Description:

Effective Date: 08/28/2002 Status: Active

Course Information View All 1 of 1

Course Sequence: 1

Course Information:

Minimum Units / Crs:

Minimum GP / Unit:

Transfer Level Allowed: Always Allow

Requirement Designation:

Valid Begin:

Valid End:

☐ Course must be GPA material

☒ Test Credit is Allowed

☒ Other Credit is Allowed

☐ Exclude In-Progress Credit

3.3.1 Consideration

COURSE INFORMATION

Course Information field is blank when the *Wildcard Indicator* check box is selected.

MINIMUM UNITS/COURSE

Enter the minimum number of units/course(s) for the course list to be considered valid.

MINIMUM GRADE/UNIT

Enter the minimum number of grade points per unit for the course list 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

Transfer Level Allowed values are PeopleSoft delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming effort.

PeopleSoft delivered values are:

Allow Always: This is the system default value. 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-Years Institution Only: Indicates that only transfer credit from accredited two-year institutions can be used to satisfy the requirement

None: System converts to Allow Always.

REQUIREMENT DESIGNATION

Enter any Requirement Designation that is a special requirement needed for graduation. 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 simply be an identifier used to track what sort of requirement this course fulfills. This is also useful as a way to group courses and can be used as an alternative to course lists. They are being used by CSU campuses for determining General Education requirements.

VALID BEGIN/END

Enter the Valid Beginning and Valid Ending date range that indicates when courses in this Course List must be taken to satisfy the requirement. Leaving the date fields blank indicates that it does not matter when the course is taken.

COURSE MUST BE GPA MATERIAL

Select the Course must be GPA Material box if the course taken to satisfy this requirement needs also to be included in the student's career grade point average calculation. The grade awarded must be set up as ***Include in GPA*** on the grading scheme table. (The course cannot be taken on a pass/no pass or audit basis. The course must be taken for a grade.)

TEST CREDIT IS ALLOWED

Select the Test Credit is Allowed box if the course taken to satisfy this requirement can be taken via the test credit portion of the student's academic record. The field is selected as a system default, but you can unselect the box if necessary.

OTHER CREDIT IS ALLOWED

Select the Other Credit is Allowed box 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 field is selected as a system default, but you can unselect the box if necessary.

EXCLUDE IN-PROGRESS

Select the Exclude In-Progress box if you do not want in-progress coursework to be counted in unit or GPA calculation. The degree audit? Course, must be fully graded to be considered valid. If this check box is not selected, a non-graded 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.

Section 4 Creating Academic Requirements:

Academic requirements contain requirement parameters, pre-conditions, connector types, partitions, detail requisite/restrictions, and line item parameters. Academic Requirement component are used to establish the requirements needed for graduation or to provide you with verifications of ongoing academic progress.

4.1 Academic Requirements

Use the Requirement page to establish the institution, career, program, plan, and sub-plan information for a new academic requirement. Because of the complex task of setting up requirements it is recommended that you set them up and test incrementally. If you set up too many any then try to find a problem, it is difficult to locate which requirement contains the problem.

Page Name: Requirement

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Requirements → Requirement

4.1.1 Consideration

COPY BUTTON

The Copy Button appears on the first page of the Academic Requirements component, only in **ADD** mode. Requirements that are eligible to be copied are academic requirements with a **Usage of Academic Advisement** and enrollment requirements with a **Usage of Requisite Restriction**.

Because the Academic Requirements pages are more complex than their Enrollment Requirement counterparts, copying from enrollment to advisement pages is not possible. Requirements with a **Usage of Requisite/Restriction** may only be copied as requisite restrictions. These requirements cannot be copied and then saved with any **Usage** other than **Requisite/Restriction**.

Note. If you use the copy feature to create a new requirement, you will not be able to assign a specific academic requirement number to the new requirement. When you save after you click the **Copy** button, the system automatically assigns the next sequential number to the new requirement. If you must assign a specific, unused number to the new requirement, do not use the **Copy** button. Instead, create the new requirement by retyping all the field values.

EFFECTIVE DATE

Use Effective Date 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.

The 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. The student's program requirement term is used to evaluate the current effective-dated row to be used.

DESCRIPTION

The Description will display in the Academic Requirement Groups/ Detail page, when you link the Academic Requirement.

LONG DESCRIPTION

The Long Description may be printed on the degree audit report. Use this field to describe the requirement in some detail and to convey exactly what you wish to convey to students and advisors about the requirement. (On the Parameters page, the **Print Control** field value controls whether the **Long Description** and required parameters are printed on the degree audit report.)

USAGE

Select the Usage value that indicates how data in the requirement is used. The field is system default to **Academic Advising**.

PeopleSoft delivered values are:

Academic Advisement: Data recorded on this page is used to define standard academic requirements or may be used on the Requisite Detail page in the Student Records application.

Student Individualized Plan: Data contained on the Authorize Student Exceptions pages overrides any standard academic requirements. The **Student Individualized Plan** value is needed when a specific student or group of students has special requirements and course overrides are used.

Requirement Course Share Restriction: Course sharing is restricted during the degree audit process based on data in the COURSE-SHARE-SET table. This field value imposes a limit on the courses that can be shared between requirement groups linked by a common course share set.

PRE-CONDITION

The system default value is **none**, indicating that the field is deactivated. If the pre-condition is false for a student, the requirement is not considered during analysis. Information is analyzed and reported only if the pre-condition is true.

If the pre-condition is **Table Entry**, then select one of the dynamic conditions that have been previously created in the Define Dynamic Condition component. If the connector type is **IN**, select one of the entity groups that have been previously created on the entity group table. PeopleSoft delivered translate values should not be modified in any way. Any modification to these values will require a substantial programming/configuration effort.

PeopleSoft delivered translate values are:

None - indicates there is no field value.

Academic Level - 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.

Academic Plan - indicates the area of study (for example, major or minor) within the academic program. Some plans are subdivided into sub-plans.

Academic Plans - indicates that all of a student's plans are part of the equation.

Academic Program - indicates the program of study to which a student applies and is admitted.

Academic Programs - indicates that all of a student's 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 - indicates a student's cumulative grade point average.

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**.)

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, such as athlete or 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.

4.1.2 Recommendation

To improve degree audit run times, simplify setups and requirements. Minimize the number of detail lines and limit pre-conditions. Academic Career/Program/Plan/Sub-Plan fields – enter values on the fields based on your academic requirements needs. Employ limits, such as minimum required units, grade points, and the like, at the lowest level possible. When you perform a search for academic requirement, make sure you filled-in the appropriate field(s) in the “Find an Existing Value” page. If you do not have the right values on the field (s), the course list might not display after you perform the search. If you employ naming conventions in the Description field, you can search for words or strings.

NOTE: Academic Advisement and Enrollment requirement use these same tables, they are differentiated by requirement usage.

4.2 Academic Requirement Parameters

Use the Parameters page to establish the parameters or filters for the specific academic requirement as well as what type of requirement information prints on the degree audit report. None of the fields on this page are required.

Page Name: Parameters

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Requirements → Parameters

The screenshot displays the 'Parameters' tab within the 'Academic Requirements' setup. The interface includes a navigation bar with 'Home', 'Worklist', 'Help', and 'Sign Out' links. Below the navigation bar, the breadcrumb trail reads: 'Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirements'. The 'Parameters' tab is selected, showing a form with the following fields:

- Academic Requirement:** 000000000
- Description:** (empty field)
- Effective Date:** 08/29/2002
- Status:** Active
- Minimum GPA:** (empty field)
- Minimum Units:** (empty field)
- Minimum Courses:** (empty field)
- Default for Detail Level:** (empty field)
- Minimum GP / Unit:** (empty field)
- *Course Ranking Scheme:** Chronological (dropdown menu)
- *Reporting:** Always Report (dropdown menu)
- *Credit Include Mode:** All Stats (dropdown menu)
- Choice Resolution Method:** Satisfy in Sequential Order (dropdown menu)
- Connector Type:** AND (radio button selected), OR (radio button)
- Partition Sharing:** (checkbox, unchecked)
- *Print Control:** Print on audit reports (dropdown menu)

4.2.1 Consideration

The fields on this page are identical to the fields on the Requirement Group Parameters page. If the field values entered here are greater than the field values entered on the Requirement Group Parameters page, the parameters specified here override those specified at the requirement group level.

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 points to that same requirement (which requires two courses), then the minimum course parameter should be set to 1 at the requirement line level and set to 2 at the requirement group parameters level.

MINIMUM GPA

Enter a Minimum GPA that is the minimum overall GPA requirement for classes elected to satisfy the requirement. Any value you enter in the field automatically populates to the ***Line Item Parameters*** page.

MINIMUM UNITS

Enter a Minimum Units value that represents the minimum total units for all the courses selected to satisfy the requirement.

MINIMUM COURSES

Enter a Minimum Courses value that represents the minimum number of courses required for the requirement.

MINIMUM GP/UNIT

The Minimum GP/Unit is used to indicate the minimum grade point for courses that satisfy the requirement. The value in this field reflects a parameter for course requirement line type as listed on the Line Item Parameters page.

COURSE RANKING SCHEME

Select the Course Ranking Scheme value that indicates how courses are ranked when used to satisfy a requirement. Course ranking scheme values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming/configuration effort.

The courses are sorted in the following order before the system attempts to satisfy the requirement.

Chronological - indicates courses are ranked by, term (first term to current term).

Course Catalog – indicates courses are ranked by, catalog number. (lowest to highest)

Grade Points - indicates courses are ranked by, grade point (highest to lowest).

Reverse Chronological - indicates courses are ranked by, term in reverse order (current term to first term).

Reverse Course Catalog - indicates courses are ranked by, catalog number in reverse order (highest to lowest)

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.

If a student has taken more courses than needed to meet the requirement 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.

REPORTING

Enter a Reporting value that indicates the conditions under which the requirement is used and reported on the degree audit report. The system default value is *Always Use*. Reporting values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming/configuration effort.

PeopleSoft delivered values are:

Always Report - indicates that the requirement is always reported, regardless of the completion status.

Report Only When Not Satisfied - indicates that the requirement 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 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.

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 predictable since the setting creates a logical paradox. However, if the **Credit Include Mode** is set to **Verify**, then the result is predictable

CREDIT INCLUDE MODE

Select the Credit Include Mode value that indicates how courses in the requirement are included in the degree audit. The system default value is **All Stats**. Commonly, you will only use courses once in an audit; either the course satisfies the General Education requirement or it satisfies the Math, English, etc plan requirement.

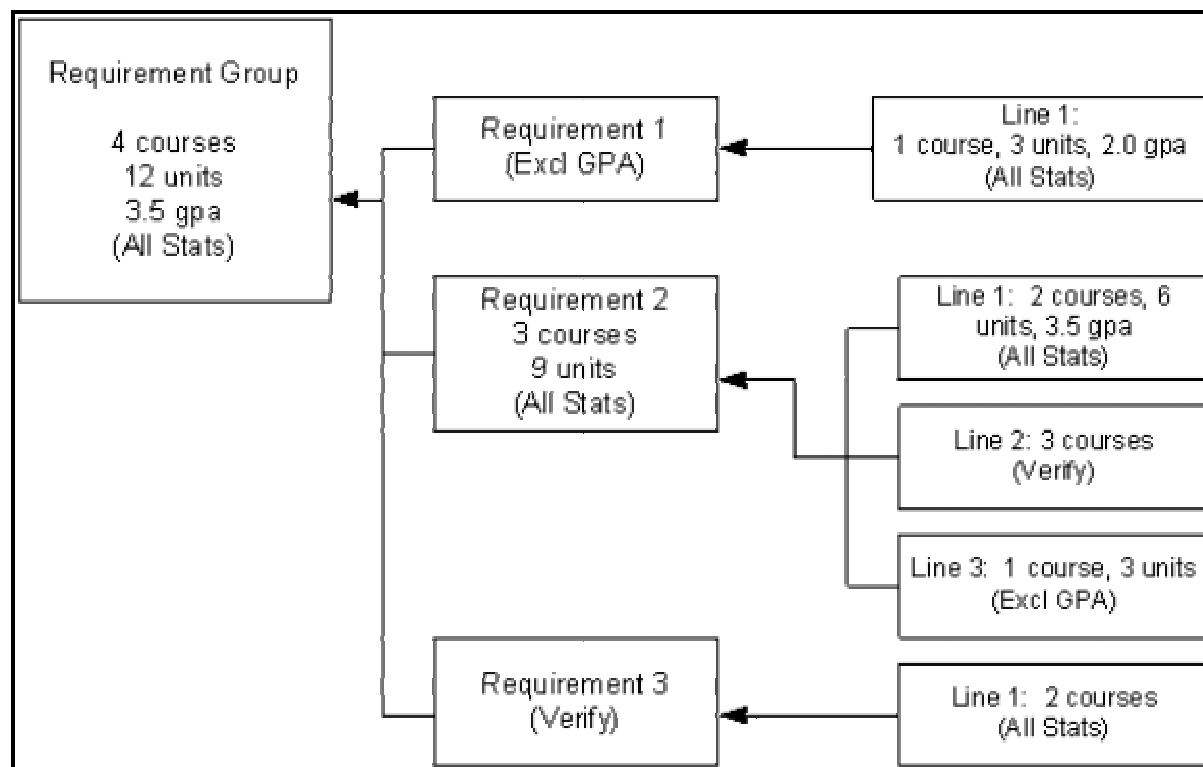
PeopleSoft delivered values are:

All Stats – indicates that all course statistics are reported – that class is “held” from being used for another requirement.

Excl GPA- indicates that courses in this requirement 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 “rolled up” to the higher level of requirement or requirement group.

Verify – indicates that the application checks/verifies that the course was taken, but credit is not recorded; the course is not “held” from being used elsewhere. However, the course is counted toward requirement group completion.

Example of Credit Include Mode



CHOICE RESOLUTION METHOD

Select the Choice Resolution Method value that indicates the preferred method of analyzing multiple partitions in an **AND** or **OR** statement.

PeopleSoft delivered values are:

Satisfy in Sequential Order – indicates that detail lines are evaluated in sequential order except for limits, which are analyzed first.

Investigate all Combinations – indicates that after limits area analyzed, detail lines are sorted so as to find the best combination in regard to the requirement.

Regardless of which method you select, if the student does not meet the requirements of any of the lines, the system will show you the courses it can get to fulfill each of the partitions. If the student meets the requirements for the Minimum number of partitions, it will show just the courses for the satisfied partitions.

CONNECTOR TYPE

Select the main Connector Type for the requirement. The connector type indicates 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, then the detail appears on the page as (A **OR** B) **AND** (C **OR** D). The first partition is (A **OR** B), the second partition is (C **OR** D). 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.) The main connector is always the connector type as specified on the panel.

If the **Connector Type** is **OR**, then the following additional fields are available:

Min Partition to Complete – Enter a Min Partitions to Complete value that indicates the minimum number of partitions that must be completed to satisfy the requirement. In the above example of “A **OR** B **AND** C **OR** D”, if the value in this field is 2, the system would look doe 2 of the 3 partitions.

Max Partitions to Allow Credit – Enter a Max Partitions to Allow Credit value that indicates the maximum number of partitions that can be credited toward meeting the requirement. This might be used in distribution requirement where a student must meet 5 of the 7 requirement lines but cannot get credit for more than 5.

Normally, courses are not shared between partitions. Select the **Partition Sharing** option if partitions can share courses.

For example, in the above 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.

If you were using the Credit Include Mode of “Verify”, you would not need to activate Partition Sharing. However, if you have a History course that satisfies the General Education requirement and a Writing requirement, you can use this control to share courses on those two requirement lines.

PRINT CONTROL

Select the Print Control value. The system default value is **Print on Audit Reports**. The value that you choose in this field controls 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 **ONLY** controls the requirement level, not the requirement group or requirement line level. Print control values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming/configuration effort.

PeopleSoft delivered values are:

Print on Audit Reports - indicates that requirement information (that is, the **Long Description** and required parameters) is always printed on the report.

Do Not Print - indicates that requirement information (as well as line item parameter information) is never printed on the report.

Print If There is Line Detail - indicates that 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 - indicates that requirement lines are printed on the report, not a description of the requirement itself. This field is not used in analysis; it impacts the printout format only.

Note that the Credit Include Mode value (All Stats or Verify) can have an impact on the Print Controls. If the requirement or requirement group is set to Credit Include Mode of “Verify”, no line detail will display, despite the Print Controls at the line level.

4.2.2 Recommendation

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.

Make sure your Connector Type is setup correctly, or else the student degree audit results will be incorrect, like units will be calculated wrong.

4.3 Academic Requirement Line Item

Use the Line Item page to create a Requirement Line Item. This page contains the detail line type for a specific academic requirement. Click the View All link to view all detail lines (including connector types) that affect the requirement.

A Line Type of *Global Limit*; *Global Sequential Restriction*; *Sequential Restriction*; or *Unit*, *Course*, or *GPA Limit* is only enforced on academic requirements with a Credit Include Mode of **All Stats**. Requirements with a Credit Include Mode of *Verify* are not held to these limits and restrictions. 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* when 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 allowing 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 is able to specify a local check instead.

Page Name: Line Item

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Requirements → Line Item

The screenshot displays the 'Line Item' setup page in PeopleSoft. The 'Line Item' tab is active, and the 'Refresh Parentheses' button is highlighted with a red circle. The form contains the following fields and values:

- Academic Requirement: 000000000
- Description: (empty)
- Effective Date: 08/29/2002
- Status: Active
- Line: (empty)
- Line Type: (dropdown menu)
- Institution: CSUNR
- Short Description: (empty)
- Long Description: (empty)
- Pre-Condition: None

At the bottom of the page, there are buttons for 'Save', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The page also includes a breadcrumb trail: Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirements > Line Item.

4.3.1 Consideration**REFRESH PARENTHESES**

Click Refresh Parentheses 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 the page is saved or when you click the button. Parentheses cannot be explicitly set to group detail rows.

LINE TYPE

Select the Line Type that indicates the line type of the requirement. Line type values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming/configuration effort.

PeopleSoft delivered values are:

Condition Requirement line type - specifies conditions associated with the student. (**Complement of Line Conditions** check box appears on page for this line type. If selected and conditions stated on Line Item Detail page are true, false is recorded. If selected and any conditions stated on Line Item Detail page are false, true is recorded. If not selected and conditions stated on Line Item Detail page are true, true is recorded. If not selected and any conditions stated on Line Item Detail page are false, false is recorded.)

Course Requirement line type - 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. A static course list is one you've created through setup; a derived course list is one that is created on the fly from parameters you've included in the requirement.

Warning! 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 pre-conditions, as necessary.

Global Limit line type - is activated when it is encountered by the audit and impacts all requirement groups using a **Credit Include Mode** of **All Stats** or **Excl GPA** that are evaluated AFTER it 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 those plan requirement groups that are evaluated after this plan and any sub-plan requirement groups. The limits usually affect courses taken from a specified list, units, or GPA in course requirement lines and specific course lines. (In addition, this line type splits courses even when the **Enable Splitting** check box on the Line Item Parameters page is not selected.)

Global Sequential Restriction line type - 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 courses are out of order, the courses are excluded from the entire audit at the level (for example, career, program, or plan) that the restriction is encountered and below. For example, to enforce a particular sequence of courses for the entire audit, place restriction at the career level with a reporting sequence of **1**.

Sequential Restriction line type - checks courses used by the stated requirement or other target to verify, that the student took the required courses in the correct order. (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 it is not correct, the courses are disallowed in the course requirement lines and specific course lines, but are available to be used by other requirements.

Specified Courses line type - enables you to specify a course list from which the student must take one course from each course sequence represented in the list. For example, if the course list consists of English 100, History 100, and a wild card for Math, the student must complete English 100, History 100, and one Math course regardless of the parameters set at the line item level.

Unit, Course or GPA Limit line type - 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 a minimum of 9.0 units, are required. Line 10 needs three 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.

LONG DESCRIPTION

The Long Description may be printed on the degree audit report. Use this field to describe the requirement in some detail. (Note: Same comment as before.) (On the Parameters page, the **Print Control** field value controls whether the **Long Description** and required parameters are printed on the degree audit report.)

Pre-Condition: Please refer to “Requirement” page for setup information.

4.4 Academic Requirement Line Item Parameters- Line Type is Course Req.

Use the Line Item Parameters page to establish Requirement Line Item parameters. This page contains line item parameters for the specified academic requirement line. The fields that are available depend on the Line Type that is recorded on the Line Item page.

The Line Item Parameters page is also used to indicate additional controls on requirement line items. You can determine the number of times that a student takes a course, split units and courses, and control what kind of requirement line item information is printed on the degree audit report. In addition, any courses still needed to fulfill a requirement can be printed as part of the academic advisement report.

The values recorded here take precedent over the parameters 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 only need 3 units. The audit engine searches for 6 units.

Page Name: Line Item Parameters

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Requirements → Line Item Parameters

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirements

Requirement Parameters Line Item Line Item Parameters Line Item Detail

View All 1 of 1

Academic Requirement: 000000016 Description: Testing Bundle 4 Split

Effective Date: 01/01/1901 Status: Active

Line Item Parameters View 1 1-2 of 2

Line Nbr: 0010 Line Name: Test Bundle 4 Split

Minimum GPA: 2.000 Maximum GPA Allowed:

Minimum Units: 2.00 Maximum Units Allowed:

Minimum Courses: Maximum Courses Allowed:

Minimum GP / Unit:

Course Ranking Scheme: Chronological Reporting: Always Report

Credit Include Mode: Verify Override Standard Set Logic

Background Key

Line Nbr: 0010 Line Name: Test Bundle 4 Split

Count Attempts

Display Select Line

Enable Splitting

Print Control: Print if there is line detail

Course Requirement line type 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.

4.4.1 Consideration

MAXIMUM GPA ALLOWED

Maximum GPA appears on the page if the **Credit Include Mode** is set to **Verify**. Enter the maximum overall GPA requirement for classes selected to satisfy this specific line number.

MAXIMUM UNITS ALLOWED

Enter a Maximum Units Allowed value that represents the maximum total units allowed for the specific line number.

MAXIMUM COURSES ALLOWED

Enter a Maximum Courses Allowed value that represents the maximum total courses allowed for the specific line number.

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. In addition, whichever value is LESS in the *Maximum Units Allowed* field or the *Maximum Courses Allowed* field is obeyed. 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

Enter the Minimum GP / Unit that is the minimum grade points per unit needed to satisfy this specific line number. (When running 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 of the Transcript Type component, then all in-progress work is included on the transcript. Specifically, if the Minimum GP / Unit field contains a value, then that value is ignored if the requirement is in progress.) This value does not override the minimum GP/unit value set on the Course List Parameters page.

COURSE RANKING AND REPORTING

Refer to Parameter page for setup information.

CREDIT INCLUDE MODE

Select a Credit Include Mode value that indicates how courses in the requirement line are included in the degree audit. Choices include *All Stats*, *Excl GPA*, and *Verify*. *All Stats* indicates that all course statistics are reported

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 and transcript whereas an *All Stats* or *Excl GPA* line uses the minimum parameters in order to free additional courses to be used elsewhere.

OVERRIDE STANDARD SET LOGIC

Override Standard Set Logic check box indicates whether a *List Include Mode* value or course list specification or both must be contained within each line item detail.

When the check box is selected, each course list (set) and operator must be placed on a separate detail line to obtain consistent, accurate audit results. (It is not required 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

COUNT ATTEMPTS

Select the Count Attempts check box 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.

When the Line Detail Type on the Line Item Detail page is **DLST**, 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 the Display Select Line check box if all courses that can be taken to fulfill an outstanding requirement need to be printed on the academic advisement report.

ENABLE SPLITTING

Select the Enable Splitting check box if units can be split during the processing of the **Line Nbr.** For example, if 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 check box is not selected in the above example, all 12 units are used to satisfy the 10-unit requirement.

This check box cannot be used with a **Credit Include Mode** of *Verify* (on the Line Item Parameters page) since it would have no effect.

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

PRINT CONTROL

Select a Print Control value. The value that you choose in this field controls whether, the **Long Description** (from the Line Item page) and the required parameters (on this page) are printed on the degree audit report.

For more information for Print Control, please refer to the Print Control/Credit Include Mode Settings table.

4.4.2 Recommendation

The **Override Standard Set Logic** check box should remain in the default status (clear) unless you COMPLETELY understand the ramifications of nonstandard or reverse logic. Only very experienced users should use this function. The check box appears on the Line Item Parameters page, but it affects how fields on the Line Item Detail page are evaluated

To prevent over-matching (that is, more credit units being applied than the minimum required), select the **Enable Splitting** check box. On the Line Item Parameters page, do not enter a value in the **Maximum Units Allowed** field. Only enter a value 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.)

Select the **Count Attempts** box if you want grades of (F) calculated into a GPA requirement.

4.5 Academic Requirement Line Item Parameters- Line Type is Condition Req.

The screenshot shows the 'Academic Requirements' setup page in the PEOPLE Soft system. The breadcrumb trail is: Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirements. The 'Line Item' tab is selected, showing 'Line Item Parameters' for 'Testing Bundle 4' (Academic Requirement: 000000015, Effective Date: 01/01/1901, Status: Active). The 'Line Item Parameters' section includes fields for 'Line Nbr' (NEW), 'Line Name', and 'Reporting' (Always Report). A 'Background Key' section at the bottom shows 'Line Nbr' (NEW), 'Line Name', and 'Print Control' (Print on audit reports).

Condition Requirement line type specifies conditions associated with the student. *Complement of Line Conditions* check box appears on the Line Item page for this line type. If selected and conditions stated on Line Item Detail page are true, false is recorded. If selected and any conditions stated on Line Item Detail page are false, true is recorded. If not selected and conditions stated on Line Item Detail page are true, true is recorded. If not selected and any conditions stated on Line Item Detail page are false, false is recorded

4.6 Academic Requirement Line Item Parameters- Line Type is Global Limit and Unit/Course or GPA Limit

The screenshot shows the 'Academic Requirements' setup page in the PEOPLE Soft system, similar to the previous one but for a different line type. The 'Line Item Parameters' section includes fields for 'Line Nbr' (NEW), 'Line Name', 'Minimum GPA' (input field), 'Maximum GPA Allowed' (input field), 'Maximum Units Allowed' (input field), and 'Maximum Courses Allowed' (input field). It also includes 'Course Ranking Scheme' (Chronological), 'Reporting' (Always Report), and an 'Override Standard Set Logic' checkbox. The 'Background Key' section at the bottom shows 'Line Nbr' (NEW), 'Line Name', and 'Print Control' (Print on audit reports).

Global Limit line type is activated when it is encountered by the audit and impacts all requirement groups using a **Credit Include Mode of All Stats** or **Excl GPA** that are evaluated AFTER it is encountered. The limits usually affect courses taken from a specified 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.

Unit, Course or GPA Limit line type 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.

4.6.1 Consideration

If values are not entered in Maximum Units Allowed and Maximum Courses Allowed fields, the defaulted value for each field is zero (0). If either of these fields is left blank, the limit excludes all courses in the course list since a blank field has a field value of zero (0). 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 zero (0), all courses in the course list are ineligible to be used 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.

4.6.2 Recommendation

The **Override Standard Set Logic** check box should remain in the default status (clear) unless you COMPLETELY understand the ramifications of nonstandard or reverse logic. Only very experienced users should use this function. The check box appears on the Line Item Parameters page, but it affects how fields on the Line Item Detail page are evaluated

4.7 Academic Requirement Line Item Parameters- Line Type is Global Sequential Restriction

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirements [New Window](#)

Requirement Parameters Line Item Line Item Parameters Line Item Detail

View All 1 of 1

Academic Requirement: 000000015 Description: Testing Bundle 4
Effective Date: 01/01/1901 Status: Active

Line Item Parameters View All 3 of 3

Line Nbr: NEW Line Name:

Reporting: Always Report

Background Key

Line Nbr: NEW Line Name:

☐ Count Attempts Print Control: Print on audit reports

Global Sequential Restriction line type 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). (Refer to the Course List guideline for Course Sequence.) If courses are out of order, the courses are excluded from course requirement lines and specific course lines from the point at which the sequential problem is encountered. **Sequential Restriction** line type checks courses used by the stated requirement or other target to verify, that the student took the required courses in the correct order. (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, the courses are disallowed in the course requirement lines and specific course lines, but are available to be used by other requirements.

4.8 Academic Requirement Line Item Parameters- Line Type is Specified Courses

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirements

New Window

Requirement Parameters Line Item Line Item Parameters Line Item Detail

View All 1 of 1

Academic Requirement: 000000015 Description: Testing Bundle 4

Effective Date: 01/01/1901 Status: Active

Line Item Parameters View All 3 of 3

Line Nbr: NEW Line Name:

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

*Course Ranking Scheme: Chronological *Reporting: Always Report

*Credit Include Mode: All Stats

Background Key

Line Nbr: NEW Line Name:

☐ Count Attempts ☐ Display Select Line ☐ Enable Splitting

Print Control: Print on audit reports

Specified Courses line type enables you to specify a course list from which the student must take one course from each course sequence represented in the list. For example, if a course line type of *Specified Courses* points to a CLST of English 100, History 100, and a wild card for Math, the student must complete English 100, History 100, and one Math course regardless of the parameters set here. The minimum units/courses field values refer to an overall requirement for the line.

Recommendation – Please refer to Line Type Course Requirement page for setup information.

4.9 Academic Requirement Line Item Detail

Use the Line Item Detail page to set up additional parameters based on course lists or conditions. Each detail line is defined by parameters on the Line Item Parameters page. Depending on the Line Type that is recorded on the Line Item page, different fields and field values are available on this page. Each line must have at least one line item detail. The Line Detail Sequence is the row number of the line item detail as described on this page. You can have multiple rows of line detail under a single Line Nbr (line number).

Page Name: Line Item Detail

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Requirements → Line Item Parameters

4.9.1 Consideration**LINE DETAIL SEQUENCE**

Line Detail Sequence is 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

Select the Line Detail Type value that indicates the type of line detail.

PeopleSoft delivered values are:

Course List (CLST) – indicates a group of courses that is defined in the Course List Table.

Derived Course List (DLST) – specifies a subset of a student’s transcript or academic record based on condition or analysis.

When the **Line Detail Type** is **CLST**, the advisement engine does not pull courses with no earned credit into the evaluation of the requirement since 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 allow 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 **DLST** is intersected with a **Line Detail Type** of **CLST**, then the characteristics of the course list line detail type prevail, and no non-credit earning courses are pulled into the requirement.

Below is a screen shot shows **Line Detail Type** values using **Derived Course List**.

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirements [New Window](#)

Requirement Parameters Line Item Line Item Parameters Line Item Detail

View All 1 of 1

Academic Requirement: 000000016 Description: Testing Bundle 4 Split

Effective Date: 01/01/1901 Status: Active

Line Item View 1 1 of 1

Line Nbr: 0010 Descr: Test Bundle 4 Split

Line Item Detail View All 1 of 1

'Line Detail Sequence: 1 'Line Detail Type: DLST Derived Course List

List Recall Mode: Used by Requirement

☐ Ignore Missing Target

Academic Requirement: 000000015 Testing Bundle 4

Line Nbr: 0010 Testing Bundle 4

Save Return to Search Next in List Previous in List Add Update/Display Include History Correct History

[Requirement](#) | [Parameters](#) | [Line Item](#) | [Line Item Parameters](#) | [Line Item Detail](#)

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, in order 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 will display each and 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, as those are the values used to calculate the GPA. If you want 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.

LIST RECALL MODE

Select the List Include Mode 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.) Field choices are **Y** (indicating union), **I** (indicating intersection), and **N** (indicating subtraction).

Once **F7** is pressed, if the new Line Detail Type is course list (**CLST**), the List Include Mode value affects the Course List field value.

Once **F7** is pressed, if the new Line Detail Type is derived course list (**DLST**), the List Include Mode value affects the List Recall Mode field value.

If the Display Select Line option is selected on the Line Item Controls panel, then the List Include Mode field value is set to Union (Y).

If the Override Standard Set Logic option on the Line Item Parameters panel is selected, then the possible values for this field include "C" (complement).

If Derived course list is selected, **List Recall Mode** values are as follows:

None - indicates no field value.

2-year Institution Transfer Courses - indicates all transfer courses from an accredited 2-year institution.

4-year Institution Transfer Courses - indicates all transfer courses from an accredited 4-year institution.

All Courses Used - indicates all courses used to satisfy requirements where Credit Include Mode is All Stats or Exclude GPA (not all the courses taken). This choice picks up all courses used at the point at which this was encountered in the audit.

All Courses - indicates all courses the student has taken that are referenced in the Course Catalog. If you want to identify only courses that are marked as "Valid Attempt," use a course list with the Wild Card option selected or use the Derived List option "Valid Attempts."

Courses in Target Career - indicates all courses taken under the Career specified on the Requirement Group to which this Requirement is attached. No courses taken in another career will be pulled in.

Credit with No Designation - indicates all courses with no requirement designation.

Grade Category - indicates all courses assigned a grade that belongs to a particular grade category. Grade Category is defined on the Grade Scheme Table.

Include in GPA Courses - indicates all courses completed with a grade that can be included in GPA.

Other Credit - is all course credit granted through the other credit panels.

Taken After Limit (#Units) - indicates that the system will start looking for units after it has passed the number of units specified in the **Quantity** field. The units are considered in chronological order. For example, you may want to assess courses taken while in Residence *after* 90 units have been taken.

Taken Before Limit (#Units) - indicates that the system will look only at units taken before the unit value entered in the **Quantity** field.

Taken Before Term in Residence Nbr - counts courses taken before this term in residence. Enter the number of the term in the **Quantity** field.

Taken Before Term Number - indicates courses that were taken before the term number entered in the **Quantity** field. Terms are counted starting with the first term in which a student is enrolled in at least one course. For example, term 1 is the student's first term in which he is enrolled in at least one course at the university. Term 3 is the third term in which the student is enrolled. The value for the term is assigned at the start of the term, not upon completion.

Taken in Consecutive (#Terms) - indicates how many terms in consecutive order are to be checked against the derived course list. Enter number of terms in **Quantity** field. Terms are considered in chronological order. (For a student, consecutive terms are defined as consecutive enrolled terms. For example, if a student is enrolled in Spring and Fall but not Summer, then the student's Spring and Fall classes are considered 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 97 and Spring 98, 3 courses from Spring 98 and Fall 98, 3 courses from Fall 98 and Spring 99, and 3 courses from Spring 99 and Fall 99. In this example, 5 terms were retrieved with a total of 12 courses selected. If a student does not have the number of terms specified, no courses are evaluated for that "block."

Taken in Last (#Terms) - indicates how many consecutive terms are to be checked against the derived course list. 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.

Taken in Last (#Units) - indicates how many consecutive units are to be checked against the derived course list. These units begin with the most recent taken and go back in time. (For example, units completed in Fall 1996, Summer 1996, Spring 1996.) Enter number of units in the **Quantity** field.

Taken in Last Graded (#Terms) - indicates how many consecutive terms in which the student received a grade are to be checked against the derived course list. These terms begin with the most recent term in which the student received a grade and go back in time. Enter number of terms in the **Quantity** field.

Taken While in Residence - indicates courses taken while the student is in residence.

Test Credit - is credit that a student earns via testing.

Transfer Credit - is credit that is transferred from any other institution.

Used by Academic Plans - includes all courses used by requirement groups that point to the student's academic plan(s).

Used by Academic Programs - includes all courses used by requirement groups that point to the student's academic program(s).

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 Sequence Number.

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 Student Career Number of 0 on the Student Program panel.

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 main Connector Type is OR, the **Recall Interpretation** field appears on this panel. The value determines how values (courses) are returned from the target (in this case, the requirement group) that is being referenced. **All Components Combined** indicates that all course partitions are combined. **Component with Max Courses** indicates the partition containing the most of one type of class is used rather than a partition with a lesser number of one type of class. For example, you may have a requirement group assessing whether a student met the foreign language requirement. Each line might be a requirement looking for classes within different languages. A partition that has pulled five Spanish classes would be used rather than a partition of three Italian classes. **Each Component** indicates that each partition is evaluated. This field value returns a vector, which is a list of lists representing courses from each partition.

Used by Requirement - indicates all courses used by a specific requirement. Enter the appropriate requirement in the **Academic Requirement** field and the specific requirement line number in the **Line Nbr** field.

If the academic requirement main Connector Type is OR, and you do not complete the Line Number field, the **Recall Interpretation** field appears on this panel. The value you choose in this field controls how the line detail is interpreted.

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 a valid attempt, whereas a grade of W may not be considered a valid attempt.)

IGNORE MISSING TARGET

Select Ignore Missing Target option if you want to indicate that if the specified Requirement Group or Requirement is not available for the student (due to a pre-condition, for example), the audit should continue to process but have no results for this line. If you do not turn on this option and the target does not apply to the student, you'll receive an error when you run the audit.

Section 5 Processing Academic Requirement Groups in the Degree Audit

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 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

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 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 ** (note special features of this number)

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 or Above

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/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

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 and Academic Sub-Plan Table, respectively.

Warning! 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

Section 6 Academic Requirement Groups

Academic requirement groups consist of detail lines pointing to conditions, courses, and requirements as well as parameters that include unit and course requirements. If you try to create a requirement group without supplying information in all the required page fields, an error/information message appears that indicates which information is missing.

Requirement groups you can build identify the student population to be evaluated in the audit or advisement process. For example, requirement groups that target all undergraduate students or only undergraduate students in the math plan or only undergraduate students who belong to a specific student group. The academic advising engine compares a student's career, program, plan, and sub-plans with the academic structure established for a requirement group.

6.1 Academic Requirement Group

Use the Requirement Group page to establish the institution, career, program, plan, and sub-plan information for a new requirement group.

Page Name: Requirement Group

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Requirements Groups → Requirement Group

The screenshot shows the 'Requirement Group' setup screen in PeopleSoft. The breadcrumb navigation is: Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirement Groups. The 'Requirement Group' tab is selected. The form contains the following fields:

- Requirement Group: 000000
- Effective Date: 08/30/2002
- Status: Active
- Description: (empty)
- Short Description: (empty)
- Long Description: (empty)
- Reporting Seq: 1
- Usage: Academic Advisement
- Academic Institution: CSUNR (Test University)
- Academic Career: UGRD (Undergraduate)
- Academic Program: (empty)
- Academic Plan: (empty)
- Academic Sub-Plan: (empty)
- Pre-Condition: None

The 'Copy' button is located in the top right corner of the form area, next to the 'View All' button and the '1 of 1' indicator.

6.1.1 Consideration**COPY BUTTON**

Copy Button appears on the first page of the Academic Requirement Groups component, only in **ADD** mode. 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.

If you use the copy feature to create a new requirement group, you cannot 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.

REQUIREMENT GROUP

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.

EFFECTIVE DATE

The date reflects the requirement term of the student being audited. The audit picks the appropriate requirement term for the student and matches it to the effective-dated row. During the evaluation process that determines which requirement group applies to a student, the begin date of the requirement term for that academic career, program, plan or sub-plan is matched to the appropriate effective-dated row for requirement groups defined to the same academic structure level. The student must satisfy the requirements of the correct effective-dated row in order to graduate.

DESCRIPTION

The **Description** text is used in the dialog box in the Description field. (Same comment as before.) If partial text is entered in the Description field, the system will match the partial description entered with this field.

Enter the Long Description to provide the internal description of the requirement group. ***This is the value that displays on the Advising Transcript.*** This is a 254-character field.

REPORTING SEQ.

Enter the Reporting Seq. value that indicates the sequence (or order) in which a requirement group is analyzed and reported during the academic advisement process. The default is 1. Normally, requirement groups are processed in requirement group order number, within the same academic structure and same Reporting Sequence value. However, you can control how the requirement groups are analyzed and printed within the same academic structure by using the Reporting Sequence value.

USAGE

Please refer to Academic Requirement page for setup information.

ACADEMIC CAREER

If you complete only the Institution and Career values, the system will use all requirement groups where those two values match the student's institution and career as it performs the audit. (A value in this field is mandatory.)

ACADEMIC PROGRAM

Select the Academic Program to which a student applies, is admitted, and ultimately graduates. (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

Enter the Academic Plan that is 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 within the specified program.)

The system ensures that the Program and Career values match the Plan you enter; it will override the values you've entered if they are not correct for that Plan.

ACADEMIC SUB-PLAN

Enter the Academic Sub-Plan that is 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

Please refer to Academic Requirement page for setup information.

6.1.2 Recommendation

To improve audit degree run time - PeopleSoft maximum number of Requirement Groups to be processed at a specific academic level (in the program AXR3) is 30. The maximum number of Requirement Groups that can be processed for the entire audit (accumulated in program AXR2 from all calls to AXR3) is 50.

The student's academic structure (career/program/plan) is read in and stored in an array. Program AXR2 takes the first level (career) and calls program AXR3 to retrieve all the Requirement Groups that are defined to the academic value. (Note: Actually, it's not to improve run time. Once you get an overflow error, the report does not even run. Glad you included this.)

6.2 Academic Requirement Group Parameters

Use the Parameters page to establish the requirement group parameters or filters for this specific requirement group. ***These parameters are used after the Line level parameters of the Requirement are satisfied.*** None of the fields on this panel are required. In order for requirement group parameters to work, you must define detail lines. Detail lines are established on the Requirement Group Detail panel. You can set up the parameters first, but detail lines are necessary for parameters to be effective.

Page Name: Parameters

Navigation: [Home](#) → [Manage Student Records](#) → [Define Academic Requirements](#) → [Setup](#) → [Academic Requirements Groups](#) → [Parameters](#)

Requirement Group: 000000 Description: + -

Effective Date: 08/30/2002 Status: Active

Minimum GPA: Default for Detail Level

Minimum Units: Minimum GP / Unit:

Minimum Courses:

'Course Ranking Scheme: Chronological

'Reporting: Always Report

'Credit Include Mode: All Stats

Choice Resolution Method: Satisfy in Sequential Order

Connector Type

☒ AND ☐ OR ☐ Partition Sharing

'Course Share Set Description

6.2.1 Consideration

The values on this page are identical to the Requirement Parameters page. Please refer to Academic Requirement Parameters page.

COURSE SHARE SET

Enter the appropriate Course Share Set number. (Prompt contains values that were established using the Course Share Sets page -- see section on setting up Course Share Sets.) 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.

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

6.2.2 Recommendation

Make sure your Connector Type is setup correctly, or else the student degree audit results will be incorrect, like units will be calculated wrong.

6.3 Academic Requirement Groups Detail

Use the Detail page to review the detail for a specific requirement group. You can view all detail lines (including connector types) that affect the requirement group.

Page Name: Detail

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Requirements Groups → Detail

The screenshot shows the PeopleSoft Academic Requirement Groups Detail page. The top navigation bar includes links for Home, Worklist, Help, and Sign Out. Below the navigation bar, the breadcrumb trail is: Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirement Groups. A 'New Window' link is also present. The page has several tabs: Requirement Group, Parameters, Detail (selected), Detail Parameters, Plans Required, and Plans Appended. The 'Detail' tab shows the following information:

- Requirement Group: 000000
- Description:
- Effective Date: 08/30/2002
- Status: Active

Below this information is a section for 'Group Line Type'. It includes a 'View All' link and a '1 of 1' indicator. A table is displayed with the following columns:

Group Line Type	Line
Course	NEW
Condition	
Course	
Requirement	
Wild Card Course	

The 'Course' option is selected in the dropdown menu. At the bottom of the page, there is a 'Save' button and a row of buttons: Add, Update/Display, Include History, and Correct History. The bottom navigation bar shows the following links: Requirement Group | Parameters | Detail | Detail Parameters | Plans Required | Plans Appended.

6.3.1 Consideration

GROUP LINE TYPE

Select the Group Line Type to the type of requirement group line. Group line type values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values will require a substantial programming/configuration effort.

PeopleSoft delivered values are:

Condition line type - specifies conditions that the student must satisfy. (For example, a specific academic plan can be required.)

Course line type - enables you to specify a specific course that a student must have taken. This includes checking for equivalent courses.

Requirement line type - specifies a requirement key in the requirement table. Multiple requirement groups can point to a single requirement that was created only one time. As a result, History 101 could satisfy a GE requirement as well as a History major requirement.

Wild Card Course line type - 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. Requirement groups with a **Group Line Type** of *Wild Card Course* act like requirements with a **Line Detail Type** of *CLST* on the Line Item Detail page and do not pull courses with no earned credit into the evaluation of the requirement group.

Below screen shot is Group Line Type *Course*.

The screenshot shows the PEOPLE SofT Academic Requirement Groups setup screen. The 'Requirement Group' is 000000, 'Effective Date' is 08/30/2002, and 'Status' is Active. The 'Group Line Type' is 'Course'. The 'Course ID' is 000004, 'Description' is 'Introductory Biology', 'Subject Area' is 'BIO', and 'Section' is '1A'. The 'Include Equivalent Courses' checkbox is unchecked. The 'Line' is 'NEW'. The 'Save' button is highlighted.

Below screen shot is Group Line Type *Requirement*.

The screenshot shows the PEOPLE SofT Academic Requirement Groups setup screen. The 'Requirement Group' is 000000, 'Effective Date' is 08/30/2002, and 'Status' is Active. The 'Group Line Type' is 'Requirement'. The 'Requirement' is 000000001, 'Description' is 'Economics', and 'Requirement Usage' is 'Requisite/Restriction'. The 'Line' is 'NEW'. The 'Save' button is highlighted.

REQUIREMENT

Choose one of the Academic Requirements already established. Peoplesoft will not allow you to save a Requirement Group with a Group Line Type of Requirement which does not refer to a specific Academic Requirement.

Below screen shot is Group Line Type *Condition*.

PEOPLE
Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirement Groups [New Window](#)

Requirement Group Parameters Detail Detail Parameters Plans Required Plans Appended

View All First 1 of 1 Last

Requirement Group: 000000 Description:

Effective Date: 08/30/2002 Status: Active

Group Line Type View All 1 of 1

'Line: NEW

'Group Line Type: Condition

Academic Institution: Test University

Condition Code: Academic Plan

Condition Operator: Equal

Condition Data: ART Art

Save Add Update/Display Include History Correct History

[Requirement Group](#) | [Parameters](#) | [Detail](#) | [Detail Parameters](#) | [Plans Required](#) | [Plans Appended](#)

CONDITION CODE

Enter the Condition Code that indicates which field in the database will be checked by this condition. PeopleSoft delivered translate values should not be modified in any way. Any modification to these values will require a substantial programming/configuration effort.

Please refer to Academic Requirement page under Pre-Condition for the Condition Code delivered values definition.

Below screen shot is Group Line Type *Wild Card Course*.

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirement Groups [New Window](#)

Requirement Group Parameters Detail Detail Parameters Plans Required Plans Appended

View All First 1 of 1 Last

Requirement Group: 000000 Description:

Effective Date: 08/30/2002 Status: Active

Group Line Type View All 1 of 1

Line: NEW

Group Line Type: Wild Card Course

Academic Institution: Test University

Academic Group:

Subject:

Catalog Nbr:

Art

Save Add Update/Display Include History Correct History

[Requirement Group](#) | [Parameters](#) | [Detail](#) | [Detail Parameters](#) | [Plans Required](#) | [Plans Appended](#)

Academic Group/Subject/Catalog Nbr.: Please refer to **Academic Course List Detail** page for setup information.

6.4 Academic Requirement Groups Detail Parameters

Use the Detail Parameters page to establish course validation parameters. This page is blank unless the Group Line Type on the Detail page is Course or Wild Card Course.

Page Name: Detail Parameters

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Academic Requirements Groups → Detail Parameters

Below screen shot is a Group Line Type **Course or Wild Card Course**.

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirement Groups [New Window](#)

Requirement Group Parameters Detail Detail Parameters Plans Required Plans Appended

View All 1 of 1

Requirement Group: 000000 Description:

Effective Date: 08/30/2002 Status: Active

Course Validation Parameters View All 1 of 1

Course Information:

Minimum Units: Minimum Units / Crs:

Minimum Courses: Minimum GP / Unit:

Transfer Level Allowed: Always Allow

Requirement Designation:

Valid Begin: Valid End:

Course must be GPA material

Test Credit is Allowed

Other Credit is Allowed

Exclude In-Progress Credit

Save Add Update/Display Include History Correct History

6.4.1 Consideration

Please refer to *Academic Course List Parameters* page for setup information.

6.5 Academic Requirement Groups Plans Required

Use the Plans Required page to 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: Plans Required

Navigation: [Home](#) → [Manage Student Records](#) → [Define Academic Requirements](#) → [Setup](#) → [Academic Requirements Groups](#) → [Plan Required](#)

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirement Groups [New Window](#)

Requirement Group Parameters Detail Detail Parameters Plans Required Plans Appended

View All 1 of 1

Requirement Group: 000000 Description: + -

Effective Date: 09/03/2002 Status: Active

☒ Other Plans/Sub-Plans Required 1 Number Required

Plans/SubPlans Required View All 1 of 1

Plan Sequence: 1 + -

Academic Institution: Test University

Academic Career: Undergraduate

Academic Program:

Academic Plan:

Academic Sub-Plan:

Save Add Update/Display Include History Correct History

6.5.1 Consideration

OTHER PLANS/SUB-PLANS REQUIRED

Select the Other Plans/Sub-Plans Required check box if any concentrations or specializations are required. If this check box is selected, additional fields are provided.

NUMBER REQUIRED

Enter the value indicating the number of plans or sub-plans that must be declared by the student in the Number Required field. If field is left blank, all plans and sub-plans (if any) are required.

PLAN SEQUENCE

Enter the Plan Sequence value that indicates the order (or sequence) of multiple plans or sub-plans, if any.

6.6 Academic Requirement Groups Plans Appended

Use the Plans Appended page to 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. 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.

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. As a result, you can hold a medical student to biology requirements.

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.

Page Name: Plans Appended

Navigation: [Home](#) → [Manage Student Records](#) → [Define Academic Requirements](#) → [Setup](#) → [Academic Requirements Groups](#) → [Plan Appended](#)

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Academic Requirement Groups [New Window](#)

Requirement Group Parameters Detail Detail Parameters Plans Required Plans Appended

View All 1 of 2

Requirement Group: 000000 Description:

Effective Date: 09/03/2002 Status: Active

Include Requirement Groups for:

Academic Institution: Test University

Academic Career:

Academic Program:

Academic Plan:

Academic Sub-Plan:

Save Add Update/Display Include History Correct History

[Requirement Group](#) | [Parameters](#) | [Detail](#) | [Detail Parameters](#) | [Plans Required](#) | [Plans Appended](#)

6.6.1 Consideration

The **Academic Career**, **Academic Program**, **Academic Plan**, and **Academic Sub-Plan** fields are used during analysis to search for requirement groups that match the structure defined on this page. (These fields are not prompt values.) Blank fields are ignored, and a requirement group is appended only if all the non-blank field values match exactly.

ACADEMIC CAREER

Enter the Academic Career that contains the academic program. A value in this field is not mandatory. If a value is entered, then the value is used to locate the requirement group. If the field is left blank, then this requirement group may not be selected during analysis.

ACADEMIC PROGRAM

Select the Academic 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 entered, then the value is used to locate the requirement group. If the field is left blank, then this requirement group may not be selected during analysis.

ACADEMIC PLAN

Enter the Academic Plan that is 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 entered, then the value is used to locate the requirement group. If the field is left blank, then this requirement group may not be selected during analysis.

ACADEMIC SUB-PLAN

Select the Academic Sub-Plan that is 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 entered, then the value is used to locate the requirement group. If the field is left blank, then this requirement group may not be selected during analysis.

Section 7 Requirement Usage

Use the Requirement Usage page to create special usage field values for generating alternate report formats. Usage field values can be configured in order to create alternate report formats. Special usage values are used to isolate or point to specific students or groups of students. Once a requirement group has been assigned a special usage, the transcript type tables can specify a special report identified by the requirement group usage. Usages can be user-defined at the requirement group level only.

7.1 Requirement Usages

Page Name: Requirement Usages

Navigation: [Home](#) → [Manage Student Records](#) → [Define Academic Requirements](#) → [Setup](#) → [Requirement Usages](#)

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Requirement Usages [New Window](#)

Requirement Usage

View All 1 of 1

Requirement Usage: ADV

Effective Date: 01/01/1900

Status: Active

Description: Academic Advisement

Short Description: Advisement

Long Description: Use for Standard Advisement Requirements

No Special Formatting

Save Return to Search Next in List Previous in List Add Update/Display Include History Correct History

7.1.1 Consideration

REQUIREMENT USAGE

Enter the appropriate Requirement Usage. Usages delivered with the system are 3-character values (for example, STD and ADV). All user-defined usages must be 4-character values (for example, PHBK). The first and last characters cannot be spaces.

Once a requirement usage is established, create a requirement group on the Requirement Groups page that uses the special usage in the **Usage** field. On the Basic Data page, select the **Special Advising Report** check box and enter the special usage in the **Requirement Usage** field. Then run an audit (using the Transcript Request component) that uses the special usage as the transcript type on the Request Header page.

Once a **Requirement Usage** is established all requirement groups that are flagged with this usage are pulled into audits with this usage specified as part of the transcript type.

NO SPECIAL FORMATTING

No Special Formatting appears on the 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.

Section 8 Condition Processes

Every institution can create unique conditions to meet specific needs. A custom condition might be needed to establish a minimum requirement or might be used to 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 the 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 conditions truth values, either T or F.

8.1 Condition Processes

Use the Condition Processes page to establish custom conditions. 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.

Page Name: Condition Processes

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Condition Processes

The screenshot displays the 'Condition Processes' page in the PeopleSoft interface. The page header includes the PeopleSoft logo and navigation links: Home, Worklist, Help, and Sign Out. Below the header, a breadcrumb trail shows the path: Home > Manage Student Records > Define Academic Requirements > Setup > Condition Processes. The main content area is titled 'Condition Processes' and features a form for creating a new condition process. The form includes the following fields and controls:

- Condition Process Identifier:** 0000
- Effective Date:** 09/03/2002
- Status:** Active (dropdown menu)
- Description:** (text input field)
- Short Desc:** (text input field)
- Logical Process Type:** Cobol Process (dropdown menu)
- Logical Name:** (text input field)
- Process Key Format:** TYP1 (text input field) with a magnifying glass icon and the text 'Program Key'.
- Ignore Key Count:** (checkbox, currently unchecked)
- Required Key Count:** (text input field)

At the bottom of the form, there are several buttons: Save, Add, Update/Display, Include History, and Correct History. The page also includes a 'View All' link and a 'New Window' link.

8.1.1 Consideration

CONDITION PROCESS IDENTIFIER

The value in this field is 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.

Three condition process identifiers are delivered with the system. These are 0001 Milestone Check, 0002 Internal Degree Check, and 0003 External Degree Check.

LOGICAL PROCESS TYPE

Enter the Logical Process Type that indicates what process will be used. Currently, the only field value available is ***Cobol Process***.

LOGICAL NAME

Enter the Logical Name of the program that is called for this specific condition process identifier.

PROCESS KEY FORMATT

Select the Process Key Format that controls what fields are available on the Condition Parameters and Condition Controls pages. The default value is ***TYP1 Program Key***.

PeopleSoft delivered values are:

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

If the Ignore Key Count check box is not selected, the ***Required Key Count*** field is used to specify how many key values (or rows) on the Condition Parameters page must be entered or the value is assumed to be zero. If a key count value is not entered, then no entries are permitted on the Condition Parameters page.

IGNORE KEY COUNT

If the Ignore Key Count check box is selected, the ***Required Key Count*** field is unavailable and the number of rows on the Condition Parameters page is not relevant.

Section 9 Define Entity Group

This section describes how to create and use expanded conditions and custom conditions. Expanded conditions consist of entity groups and dynamic conditions. Entity groups and dynamic conditions can be used as pre-conditions or condition requirements.

A condition table allows a solid structure for condition expansion, including condition processes. Create Custom Conditions per institution, as needed basis. 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.

9.1 Define Entity Group

Use the Entity Group page to 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.

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.

Page Name: Entity Group

Navigation: [Home](#) → [Manage Student Records](#) → [Define Academic Requirements](#) → [Setup](#) → [Define Entity Group](#)

The screenshot displays the 'Entity Group' setup page in PeopleSoft. The page header includes the PeopleSoft logo and navigation links: Home, Worklist, Help, and Sign Out. The breadcrumb trail is: Home > Manage Student Records > Define Academic Requirements > Setup > Define an Entity Group. The main form contains the following fields:

- Academic Entity Group:** 000000
- Effective Date:** 09/03/2002
- Status:** Active
- Academic Institution:** CSUNF Test University
- Description:** (empty text box)
- Short Description:** (empty text box)
- Long Description:** (empty text box)
- Entity Group Type:** Program

Below the main form is the 'Entity Group Item Detail' section, which contains a table with the following data:

Academic Program	Description
1 UNDGR	Undergraduate

9.1.1 Consideration

ACADEMIC ENTITY GROUP

The value in this field is an arbitrary number that is unique for each entity group. This academic entity group can be used as a pre-condition or condition requirement and can be used in Academic Advisement and Enrollment Requirements.

Enter the Entity Group Type that indicates what types of items are contained in the group.

PeopleSoft delivered values are:

Academic Program/Plan/Sub-Plan and Student Group.

ENTITY GROUP ITEM DETAIL

Enter the *Academic Plan*, *Academic Program*, *Student Group*, or *Academic Sub-Plan* that is an entity group item in this group. (The field that appears on this page depends on the **Entity Group Type** field value. For example, if the **Entity Group Type** is **Program**, then the **Academic Program** field appears on this page.) The **Description** is automatically supplied.

Section 10 Define Dynamic Condition

Use the Condition panel to create condition specifications. A condition specification is a customized condition that includes connector types, lines, process types, parameters, and controls. Once a condition specification is created, it may be used as a pre-condition or condition requirement.

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 requirement XYZ, the condition line is student group = athlete OR academic plan = dance.)

10.1 Define Dynamic Condition

Use the Condition Line page to create a condition specification.

Page Name: Condition Line

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Define Dynamic Condition → Condition Line

The screenshot displays the 'Condition Line' page in the PeopleSoft system. The page has a navigation bar at the top with links for Home, Worklist, Help, and Sign Out. Below the navigation bar, the breadcrumb trail is: Home > Manage Student Records > Define Academic Requirements > Setup > Define Dynamic Condition. The page title is 'Condition Line'. The 'Condition Line' tab is selected, and the 'Condition Parameters' and 'Condition Controls' tabs are also visible. The 'Condition Specification' field is set to 000000. The 'Effective Date' is 09/03/2002. The 'Status' is Active. The 'Description' and 'Long Description' fields are empty. The 'Short Description' field is empty. The 'Connector Type' is AND. The 'Institution' is CSUNR. The 'Condition' section shows the 'Condition Line Sequence' as 1 and the 'Condition Process Type' as Standard Condition. The 'None' dropdown is visible at the bottom.

10.1.1 Consideration

CONDITION SPECIFICATION

The value is an arbitrary number that is unique for each condition specification. This condition specification can be used as a pre-condition or condition requirement.

CONNECTOR TYPE

Select the main Connector Type for the condition specification. The connector type indicates the Boolean operator to be used in the equation that contains the condition lines.

PeopleSoft delivered values are:

None, AND, and OR. (None converts to AND.)

CONDITION LINE SEQUENCE

The Condition Line Sequence number indicates the order in which the condition lines are evaluated. This number is automatically assigned, but can be overridden by the user.

CONDITION PROCESS TYPE

Select the Condition Process Type. The system default value is **Standard Condition**.

PeopleSoft delivered values are:

Standard Condition – indicates that the condition is one of the delivered, standard conditions.

User Programmable Condition – indicates that the condition is a user programmable condition.

If **Standard Condition** is selected, three additional fields become available in order 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 **< or =**, **> or =**, **Equal**, **Greater**, **In**, **Less**, **Not Equal**, and **Not In**. Operators are not used if the standard condition is **Table Entry**.) Finally, enter the final field value to complete the statement. For example, the condition line might be **Academic Plan Equals Art History (MA)**. If the condition is **Table Entry**, then select an existing condition specification number.

Please refer to Academic Requirement page/Pre-Condition field for the Standard Condition delivered values definition.

If **User Programmable Condition** is selected, the **Condition Process Identifier** field becomes available. Enter the appropriate value that is a unique, arbitrary number for the condition process.

The screenshot displays the 'Define Dynamic Condition' page in the PeopleSoft system. The page has a navigation bar at the top with links for Home, Worklist, Help, and Sign Out. Below the navigation bar is a breadcrumb trail: Home > Manage Student Records > Define Academic Requirements > Setup > Define Dynamic Condition. The page is divided into three tabs: Condition Line, Condition Parameters, and Condition Controls. The 'Condition Parameters' tab is currently selected. It contains several fields: 'Condition Specification' (000000), 'Effective Date' (09/04/2002), 'Status' (Active), 'Description', 'Long Description', 'Connector Type' (AND), and 'Institution' (CSUNR). Below these fields is a section titled 'Condition' which includes 'Condition Line Sequence' (1), 'Condition Process Type' (User Programmable Condition), and 'Condition Process Identifier'.

PeopleSoft delivered values are:

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.

Additional **Condition Process Identifier** values can be created on the Condition Processes Table. Delivered field values are numbered from 1 through 500.

10.1.2 Recommendation

Conditional Process Identified – client added values should be numbered above 500.

10.2 Condition Parameters

Use the Condition Parameters page to establish condition parameters. 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.

Page Name: Condition Parameters

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Define Dynamic Condition → Condition Parameters

Below screen shot is a Condition Process Identifier using **Milestone Check**.

10.2.1 Consideration

The fields that are available on the page depend on the **Condition Process Identifier** that is recorded on the Condition Line page.

The **Condition Line Sequence** number, and **Condition Process Identifier** automatically populate from the Condition Line page.

Below screen shot is a Condition Process Identifier using **Internal/External Degree Check**.

Internal Degree Check condition process identifier indicates a check to see if a student has received a degree (for example, a BA) from the home institution.

Enter the **Degree** that must be obtained in order to satisfy the condition line.

External Degree Check condition process identifier 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.

10.3 Condition Control

Use the Condition Controls page to stipulate condition controls. 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.

The Condition Controls page is the third page in the Define Dynamic Condition component

Page Name: Condition Control

Navigation: Home → Manage Student Records → Define Academic Requirements → Setup → Define Dynamic Condition → Condition Control

Below screen shot is a Condition Process Identifier using **Milestone Check**.

10.3.1 Consideration

The **Condition Line Sequence** number for this condition specification automatically populate from the Condition Line page.

The **Condition Line Detail Sequence** number automatically populates from the Condition Parameters 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

Select the appropriate **Milestone Complete** field value.

PeopleSoft delivered values are:

None - indicates that the field is not applicable.

Completed - indicates that the student must complete this milestone to satisfy the condition line detail.

In Progress - indicates that the student must be working towards completing the milestone in order to satisfy the condition line detail.

Not Completed - indicates that the student must not have completed this milestone in order to satisfy the condition line detail.

MILESTONE LEVEL

Enter the Milestone 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.)

Below screen shot is a Condition Process Identifier using **Internal/External Degree Check**.

Section 11 Course Share Sets

By default, a course cannot be used by more than one requirement group. However, by using a course share set tag, courses can be shared by more than one requirement group.

You use several pages in order to set up the sharing capabilities of Academic Advisement. First, you need to set up as many course share sets as necessary. Course share sets are established on the Course Share Sets page. Once defined, the course share set values are referenced on the Requirement Group Parameters page for every requirement group that belongs to the set.

Course share sets are used after the requirement groups, requirements, and course lists are defined. In addition, the course share set is used only at the academic requirement group level and is established on the Course Share Sets page. A requirement group can reference several share sets. As a result, one requirement group can share its courses with many other requirement groups.

11.1 Course Share Sets

Use the Course Share Sets page to enable courses to 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. The course share set is used only at the academic requirement group level on the Requirement Group Parameters page.

Page Name: Course Share Sets

Navigation: [Home](#) → [Manage Student Records](#) → [Define Academic Requirements](#) → [Setup](#) → [Course Share Sets](#)

PEOPLE Soft

Home Worklist Help Sign Out

Home > Manage Student Records > Define Academic Requirements > Setup > Course Share Sets [New Window](#)

Course Share Sets

View All First 1 of 1 Last

Course Share Set: 000000000 + -

Effective Date: 09/05/2002 Active

Description: Short Desc:

Requirement:

Save Add Update/Display Include History Correct History

11.1.1 Consideration**COURSE SHARE SET**

The Course Share Set 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.

REQUIREMENT

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.