Advisor KNOW HOW :
Running "What If" Reports in Campus Solutions

Office of Academic Advising
ITTC 007 / 319273-3406 / academic-advising@uni.edu
advising.uni.edu

Our focus will be on how to create simulation advisement reports in Campus Solutions
- using what-if academic plans (majors, minors, certificates)
  using what-if courses
  using what-if catalogs
  using what-if matriculation with credits

* This session will be recorded and posted on the Academic Advisor Portal website.

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Have you encountered these situations…

● The student has a good amount of General Education complete, and is limited in major options because of scaffolding / pre-requisites and sequence of curriculum.

Wondering whether a course will double count or even just count for a requirement, in particular UNIFI.

The student who is unsure about enrolling in a course that they can't see "counting" toward something..

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Today's Agenda:

● **Prerequisite Concepts and Terminology**
  ○ Program Plan Stack Levels
  ○ Requirement Terms / Catalogs
  ○ Courses

Navigation in Campus Solutions and Steps to Requesting Advisement Report
  ○ Finding an Existing ADV Report
  ○ Adding a New Report

Using Request Advisement Report to set up What -If Case Scenarios
  ○ WHATI and ADMWH Advisement Reports

Documentation & Support Resources

Q&A

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Foundational Concepts and Terminology

What is an advisement report?

Student Record *(Declarations + Courses)*

+Advisement Rules *(by Catalog)*

Advisement Report

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What is an advisement report?

Student Record (Declarations + Courses)

+ <u>Advisement Rules</u> (by Catalog)

Advisement Report

ADV Report Type = Student Center

Student Record: "Program/Plan Stack"

● Academic Plans (Plans)
  ○ Declared Majors, Minors, Certificates
  ○ Codes: 212BAT, 780MIN, THFIUCERT
  ○ 152**PRE**, 960**PRET**

Academic Programs (Programs)
  ○ Combination of College and Degree Type
  ○ Codes: CBAUG, SBST

Academic Career (Career)
  ○ Undergraduate, Graduate, Non-Degree
  ○ Code: UGRD

Student Record - Program/Plan Stack

1(or more) Plan

History BA

1(or more) Program

SBSUG

A Career

Undergraduate

What-IF Program/Plan Stack

Plan(s) 🪣 Any

Minor, Certificate OR

Pre-Major Code

Program SBSUG

Career

UGRI

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Student Record: Program/Plan Stack

● **Requirement Terms**
  - Linked to a catalog
  - Term started in Career or Program or Plan
  - Dictates which version of rules will be applied to that student.
  - Unique to each level

Student Record: Program/Plan Stack

● **Requirement Term Codes**
- ○ Catalog Year (3 digits)
- ○ Catalog Term (Summer =1, Fall =2, Spring =3)
- ○ Currently **2023** catalog, Fall (**2**) Term
- ○ Code: 2232

Student Records - Course Records

● UNI Course Enrollments

Posted Transfer Coursework

Posted Credit by Exam

Associated Grades and Units (Statistics)

Admission Record vs. Student Record

Admission Record	Student Record
One Plan	One or more Academic Plans
One Program - Based on Plan	One or more Academic Programs
Admit Term	Requirement Terms on Each: Career, Program and Plan
Credit Pre-Posted to Application Academic Program	Credit posted to Student Record
Not available on "ADV" Advisement Report (Student Center) or Statistics	Available on Student Center ADV Report and Statistics

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Types of Advisement Reports

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"ADV" Advisement Report Type

● **Main type of Advisement Report**

   Used in Student Center

   Must have Active Student Record

   ○ After Matriculation until Graduation, Discontinued, Suspended

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WHAT-IF Advisement Report Types

- **Simulation Reports**
  - Student Record
  - What-If program/plan stack
  - What-If Courses
  - What-If Requirement Terms
  - After Matriculation, even if graduated or discontinued

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WHAT-IF (WHATI) Advisement Report

● **Today:**
  ○ Add Plans
  ○ Change Catalog for General Education from LAC to UNIFI
  ○ Add What-If Class

ADMISSION WHAT-IF (ADMWH) Advisement Report

● **Today:**
- Simulation Report
- Create Student Record based on Admission Record
- See entered Transfer Work saved to Admission Record
  - Entered on an Academic Program

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Demonstration

log in

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My Page | Resources | **Work @ UNI** | Life @ UNI | Reporting

Personalize Content | Layout | ? Help

Security Request System

Security Request System
This tool allows users to view and request roles that grant access to many systems across campus.

Security Request System Help
Help page for the SRS system

PeopleSoft SIS Access

Campus Solutions
Access to Campus Solutions.

ConnectUNI
Access to Recruiting and Grad Application Review Portal

My Administrative Access

Forms Repository

Forms Repository
Master index of important forms at the University of Northern Iowa.

My Workspaces

e-Business Resources

UNI e-BUSINESS suite

e-Business Login
Access e-Business Applications/Timecard/Payslip/Leave Balances

My Personnel Action Forms(PAF)
View your personnel actions including first hire/new appointment, position change/reappointment, special compensation and more.

Ask an e-Business Question

Register for Training
User training for e-Business

e-Business Forms

UNI Timecards

e-Business Web Site

e-Business Login Help

Business Operations Services

ProTrav System
This tool is used to reconcile procurement card charges and facilitate travel reimbursement

Request for Payment
This tool is used to request vendor payments that are not associated with a Purchase Order or Procurement Card purchase.

Business Operations Training
Training Resources

ITS Absence Request

Department Directory URL

Direct Deposit Sign-up

Custom UNI Applications

Facilities Management

Facilities Management Website
Service Requests/Work Order Status, Key and building Access requests, Rent a Vehicle, Construction Updates

Human Resource Services

HRS Website
Employee information for Merit, Merit Supervisory & Confidential, Professional & Scientific, Institutional Officials, Academic Administrators, and Faculty.

Jobs@UNI
An online electronic hiring system for faculty and staff positions for the University of Northern Iowa

Professional Development Reg
Enroll in professional development opportunities hosted by Human Resource Services. Within the registration system, click the "View current reservation schedule" button to view your registration history.

The Work Number
The University of Northern Iowa (UNI) utilizes The Work Number service for all employment or income verification requests for faculty, staff, graduate assistants, and student employees.

Benefits and Services

- Benefits
- Employee Development
- Disability Services

Benefits Self-Service System
Benefits Self-Service System is designed to help you enroll, make changes, and view your current benefit elections all in one location.

For additional support, visit the Benefits Self-Service Help site.

Working at UNI

Resources

- Employee Assistance Program
- Merit Promotion & Transfer
- P&S Promotion & Transfer

External Employee Services

- IPERS
- TIAA-CREF
- ASIFlex
- Social Security Online

Technology Resources

SERVICE HUB
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Service Hub
Service Hub allows UNI students, faculty, and staff to notify technical support personnel about issues or problems they are having with their information technology (IT), submit requests for new IT services, or browse solutions to common IT problems.
- Service Hub

Security for What -If Reports

● Security Role:
  ○ Student System

   UNI_CSS_AA_ADVISOR_SUPER or

   UNI_CSS_AA_ADV_RPT_VIEW

Security - Row Level

  ○ Report Types

   ADV, WHATI, ADMWH

Supporting Resources

● Advisor Portal / Training & Development / Advisor KNOW HOW / Archive

- ○ Request What-If Advisement Report <u>JOBAID</u>
- ○ <u>Academic Structure Guide</u> for What-If Advisement Reports
- ○ <u>Major & Minor Code Sheets</u>
    - Plan codes per Catalog
    - Registrar.uni.edu > Faculty & Staff > Major & Minor Codes
    - Undergraduate, Graduate, Program Certificates

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Upcoming Advisor KNOW HOW Sessions:

WEDNESDAY, OCTOBER 18, 2023 | 3:30 - 4:45 P.M. | ZOOM

Managing Your Advising Workload Through Advisor Reports (MyAdvisees) Workspace

CONCEPTUAL

C4 Understanding of academic advising approaches and strategies.

INFORMATIONAL

I7 Knowledge of information technology applicable to relevant advising roles.

Advisor Reports (My Advisees) workspace is a complement to Advisor Center in MyUNIverse. Through this workspace, an academic advisor can run reports specifically for their assigned students to assist in managing their caseload and work as an academic advisor. In this 45 minute session, we will walk through the diverse reports available to academic advisors and how you might engage with students on topics related to:

/ **Enrollment Status** - including full-time/part-time
/ **Registration** - including holds and foreign language requirement
/ **Grades/Academic Standing** - including mid-term/final grades, cumulative and major/minor (plan) GPA, and academic standing

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FRIDAY, DECEMBER 1, 2023 | 10:00 - 11:00 A.M. | ZOOM

Course Demand in Report Center - Information for Undergraduate Semester Planning and Persistence

CONCEPTUAL

C5 Understanding of expected outcomes of academic advising.

INFORMATIONAL

I2 Knowledge of curriculum, degree programs, and other academic requirements and options.

INFORMATIONAL

I7 Knowledge of information technology applicable to relevant advising roles.

This session is designed for academic advisors and university administrators (including deans/associate deans and department heads) to learn about and understand how to effectively use Course Demand in Report Center. Additional session description will be released at a later date.

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Questions?

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