Advisor KNOW HOW:
Running “What If” Reports in Campus Solutions

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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.
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.
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
  ○ WHAT1 and ADMWH Advisement Reports

☒ Documentation & Support Resources

☒ Q&A
Foundational Concepts and Terminology
What is an advisement report?

Student Record  (Declarations + Courses)

+ Advisement Rules  (by Catalog)

Advisement Report
What is an advisement report?

**Student Record** *(Declarations + Courses)*

+ **Advisement Rules** *(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
  ○ 152PRE, 960PRET

❖ 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
**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

<table>
<thead>
<tr>
<th>Admission Record</th>
<th>Student Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Plan</td>
<td>One or more Academic Plans</td>
</tr>
<tr>
<td>One Program - Based on Plan</td>
<td>One or more Academic Programs</td>
</tr>
<tr>
<td>Admit Term</td>
<td>Requirement Terms on Each: Career, Program and Plan</td>
</tr>
<tr>
<td>Credit Pre-Posted to Application Academic Program</td>
<td>Credit posted to Student Record</td>
</tr>
<tr>
<td>Not available on “ADV” Advisement Report (Student Center) or Statistics</td>
<td>Available on Student Center ADV Report and Statistics</td>
</tr>
</tbody>
</table>
Types of Advisement Reports
“ADV” Advisement Report Type

● Main type of Advisement Report

☑ Used in Student Center

☑ Must have Active Student Record

○ After Matriculation until Graduation, Discontinued, Suspended
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
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
Demonstration

log in

UNI University of Northern Iowa
Security for What-If Reports

● Security Role:
  ○ Student System
    ▫ UNI_CSS_AA_ADVVISOR_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 JOBAID
  - Academic Structure Guide for What-If Advisement Reports
  - Major & Minor Code Sheets
    - Plan codes per Catalog
    - Registrar.uni.edu > Faculty & Staff > Major & Minor Codes
    - Undergraduate, Graduate, Program Certificates
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**
  - Understanding of academic advising approaches and strategies.

- **INFORMATIONAL**
  - 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

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

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

- **CONCEPTUAL**
  - Understanding of expected outcomes of academic advising.

- **INFORMATIONAL**
  - Knowledge of curriculum, degree programs, and other academic requirements and options.

- **INFORMATIONAL**
  - 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.
Questions?