Hand Out # 4 – PeopleBooks List Recall Mode

List Recall Mode

If the line detail type is *Derived List,* then select a list recall mode to specify the conditions that are used to select courses from the student's transcript:

None: Select to specify no field value.

2-year Institution Transfer Courses: Select to specify external transfer course credit from a two-year institution.

Note. The Advisement School Type field on the School Type Table page contains the value that drives the derived lists in academic advisement. Each school type can belong to an advisement school type. On the School Data page, you can identify a school as a two-year or four-year institution.

4-year Institution Transfer Courses: Select to specify all external transfer course credit from a four-year institution (as defined on the School Type Table page).

All Courses Used: Select to use all courses to satisfy requirements where the credit include mode value on the Line Item Parameters page is *All Stats* or *Excl GPA.* This field value retrieves all courses that are used *before* the requirement. *Used* means captured. Verified courses are not picked up.

Important! To ensure that all courses are considered during an audit, specify a requirement group reporting sequence number of 900 or greater.

All Courses: Select to specify all courses on a student's transcript for all careers.

Courses in Target Career: Select to specify all courses (including internally transferred courses) that the student takes in the career that is specified by the target requirement group of this requirement. For example, if a requirement group is specified as an undergraduate career requirement and points to this requirement line item detail, then the target career is *Undergraduate.* (During an audit, the advisement engine uses all courses that a student takes under all active careers. Also, all transfer credit, regardless of career and program to which it was posted, can be used to satisfy the requirements of all active careers. If transfer work is allowed in the requirement, then all transfer credit that is posted to the target career is included in this list. To restrict a dual-career student from using courses that are taken in one career to satisfy requirements in both careers, use the List Recall Mode value *Courses in Target Career* to block the cross-sharing of courses from one career to another.)

Credit with No Designation: Select to specify all courses with no requirement designation.

Grade Category: Select to assign to all courses a grade that belongs to a particular grade category. (When you enter this field value, the Reference Data field becomes available to record the actual grade category prompt value.) To create a grade category prompt value, use the Grade Category Table page.

Include in GPA Courses: Select to specify all courses that are completed with a grade that is defined on the Grading Scheme Table page as *Include in GPA.*

Internal Transfer Credit: Select to specify equivalents that are awarded by the course credit system with a source type of internal. Courses that are transferred internally are selected from one career and have course equivalents that are applied to another career, program, or plan. External course credit, test credit, and other credits are not included. You use this field value to differentiate internally transferred courses from regularly enrolled courses. (Users who internally transfer courses and use the derived course list field value of *Courses in Target Career* can subtract internally transferred courses that are identified with the target career.) When courses are printed on the advisement audit, internally transferred courses are coded as *IT* (internally transferred). Previously, these courses were coded as *EN* (Enrolled).

Other Credit: Select to specify equivalents that are awarded through the Other Credits component.

Taken After Limit (#Units) (taken after limit [number of units]) and *Taken Before Limit (#Units)* (taken before limit [number of units]): Select to specify courses that the student takes after or before a unit limit, respectively. Enter the unit limit in the Quantity field. (The system evaluates units in chronological order.) For example, enter *60* to restrict courses to those taken after 60 units. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether the credit is valid for the particular derived course list.

Note. The term-related values for List Recall Mode refer to terms in which the student was enrolled in at least one course. Terms that the student did not attend are of no consequence.

Taken Before Term in Residence Nbr (taken before term in residence number): Select to count the courses that the student took before the term that is indicated. (This value pulls in home courses as well as transfer courses taken before the term that is specified.) Enter the number of terms in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course

credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken Before Term Number: Courses that the student took before the term number that appears in the Quantity field. Terms are counted starting with the first term in which a student is enrolled. For example, term 1 is the student's first term at the university and term 3 is the third term. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Consecutive (#Terms) (taken in consecutive [number of terms]): Select to specify how many terms in consecutive order are to be checked. Enter the number of terms in the Quantity field. (For a student, consecutive terms are defined as consecutive enrolled terms. For example, if a student is enrolled in spring and fall classes but not in summer classes, then the student's spring and fall classes are considered as consecutive.) When selecting a number of terms, the audit creates a vector of lists.

For example, if the engine is searching for three courses that were taken in two consecutive terms, then the results could be three courses from fall 1997 and spring 1998, three courses from spring 1998 and fall 1998, three courses from fall 1998 and spring 1999, and three courses from spring 1999 and fall 1999. In this example, five terms were retrieved with a total of 12 courses selected. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Last (#Terms) (taken in last [number of terms]): Select to specify how many consecutive terms are to be checked. These terms begin with the most recent and go back in time; for example, fall 1996, summer 1996, spring 1996. Enter the number of terms in theQuantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Last (#Units) (taken in last [number of units]): Select to specify how many consecutive units to check. These units begin with the most recent and go back in time; for example, first fall 1996, then summer 1996, and then spring 1996. Enter the number of units in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken in Last Graded (#Terms) (taken in last graded [number of terms]): Select to specify how many consecutive graded terms are to be checked. These terms begin with the most recent and go back in time. (For example, fall 1996, summer 1996, spring 1996.) Enter the number of terms in the Quantity field. All term- and unit-based derived list field values include transfer course credit, other credit, test credit, and internal transfer course credit. When evaluating transfer credit in term- and unit-based derived course lists, use the begin date of the articulation term (to which the credit is posted) to determine whether or not the credit is valid for the particular derived course list.

Taken While in Residence: Select to specify home courses that are taken while the student is in residence regardless of career.

Test Credit: Select to specify course equivalents awarded through the Test Credits component.

Transfer Credit: Select to specify credit that is transferred in from an external institution. Test credit, other types of credit, and internally transferred coursework are not included. All transfer credit, regardless of career and program to which it is posted, can be used to satisfy the requirements of all active careers. You use the Course Credits component to input this transfer credit into the system.

Note. The Advisement School Type field on the School Type Table page contains the value that drives the derived lists in academic advisement. Each school type can belong to an advisement school type. On the School Data page, you can identify a school as a two- or four-year institution.

Used by Academic Plans and *Used by Academic Programs:* Select to include all courses that are used by requirement groups in the current audit defined to the plan level or program level, respectively. *(Used By* means used by an *All Stats* or *Exclude GPA* requirement. Verified courses are not picked up.)

Note. If a student has multiple programs (containing multiple plans), the primary academic plan is not necessarily the lowest plan sequence number under a given program, but it is the plan with the lowest plan sequence number under the program with the lowest student career number.

For example, suppose that under a program of LAU (attached to a student career number of 0), a student has a plan of PSYCH with a plan sequence number of 10. The same student has a plan of ART with a plan sequence number of 10 under a program of FAU (attached to a student career number of 1). Both plans have a plan sequence number of 10, but the plan under the program with the lowest career number is the primary plan. In this example, the primary plan is PSYCH, which is tied to a student career number of 0 through the LAU program.

Used by Primary Academic Plan: Select to include all courses that are used by the requirement groups that point to the student's primary academic plan, which 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 (student career number) *0.) Used By* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

Used by Primary Academic Program: Select to include all courses that are used by the requirement groups that point to the student's primary academic program, which is the program designated by the lowest career sequence number. (On the Student Program page, the primary career is designated as student career number *0.) Used By* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

Used by Requirement Group: Select to specify all courses that are used by a specific requirement group. Enter the appropriate requirement group in the Requirement Group field. If the requirement group has two effective-dated rows, then the advisement engine selects a row based on the student's requirement term for that academic level (for example, program or plan). If the Ignore Missing Target check box is selected and a line detail type of *DLST* points to a requirement group that does not exist for the student because of an unsatisfied precondition, then a false does not occur. If the check box is not selected and a line detail type of *DLST* points to a requirement group that does not exist for the student because of an unsatisfied precondition, then a false does occur. *Used By* means used by an *All Stats* or *Excl GPA* requirement group. Verified courses are not picked up.

Used by Requirement: Select to specify all courses that are used by a specific requirement. Enter the appropriate requirement in the Academic Requirement field. (A requirement line number in the Line Nbr [line number] field is optional. If you leave this field blank and there are multiple lines in the requirement, then all lines are evaluated.) If the requirement has two effective-dated rows, then the effective-dated row that is selected by the advisement engine is based on the student's requirement term for that academic level (for example, program or plan). If you select the Ignore Missing Target check box and a line detail type of *DLST* points to a requirement that does not exist for the student because of an unsatisfied precondition, then a false does not occur. If you do not select the check box and a line detail type of *DLST* points to a requirement that does not exist for the student because of an unsatisfied precondition, then a false does occur. *Used By* means used by an *All Stats* or *Excl GPA* requirement. Verified courses are not picked up.

Course Attributes: Select to specify a course attribute as defined on the Course Attribute Table prior or equal to the effective date on the requirement. After selecting the course attribute, select the attribute value. The Attribute Value field is available only after a course attribute is selected.

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