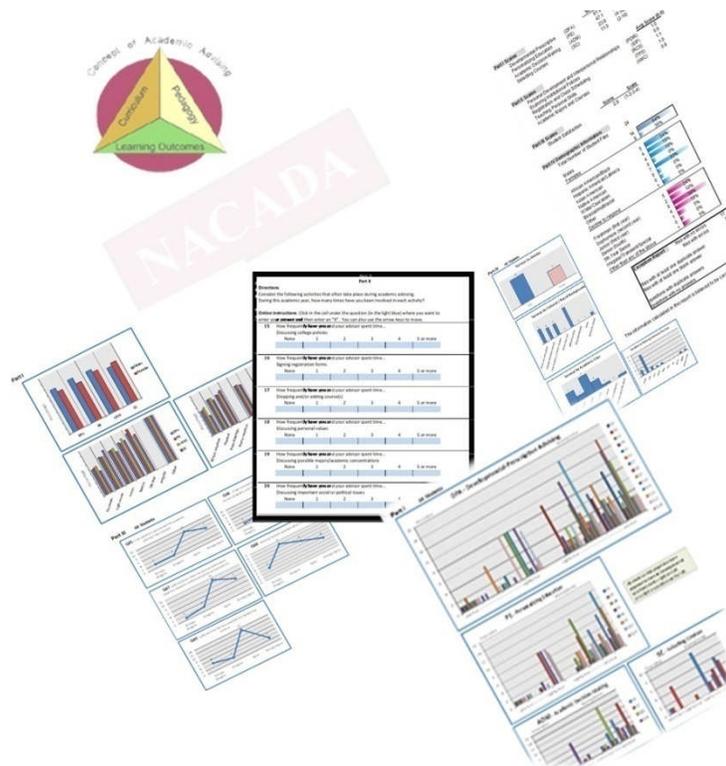


# Academic Advising Inventory System

## A User's Manual

David A. Freitag

7/26/2008



# Academic Advising Inventory System

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# Academic Advising Inventory System

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## Preface

The AAI System is adapted from the Academic Advising Inventory (AAI) developed by Roger B. Winston, Jr., Ph. D. and Janet A. Sandor, Ph. D. at The University of Georgia.

This manual explains how to use the software – not how to understand the data collected from the Academic Advising Inventory assessment instrument. The user of this software should read the AAI User’s Manual on the NACADA website to understand the information generated by the Academic Advising Inventory. Here is a link to the AAI User’s Manual:

<http://www.nacada.ksu.edu/Clearinghouse/Links/AAI%20Manual-02.pdf>

## Permission for Use

The permissions for use as described in the AAI User’s Manual remain in force for the AAIS software implementation of the AAI.

As stated in the User’s Manual for the AAI, “The *Academic Advising Inventory System* (AAIS) is provided to the academic advising profession under the auspices of the National Academic Advising Association and its Web Site as a means of promoting good practices through thorough, theory-based evaluation. The AAI is provided for the non-commercial use of advising practitioners at no costs.... No specific permission is required for institutional uses or for research studies.”

The AAIS is provided for the non-commercial use of advising practitioners at no cost by permission of David A. Freitag.

## Permission to Adapt

As stated in the User’s Manual for the AAI, “Users have permission to use AAI Parts I and II in their entirety, that is, either or both of these parts may be used in their entirety, but individual items may not be removed from these two parts for use in other instruments. Users, however, have permission to use individual items from Parts III and IV. Items in Parts III and IV may be altered or eliminated to fit local conditions.”

The software implementation of the AAI follows those restrictions and pass on those restrictions to the users of this software.

# Academic Advising Inventory System

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## Overview

The purpose of the Academic Advising Inventory System is to minimize the time needed in administrating AAI surveys to students, and to minimize the time needed to consolidate all the student surveys and report the results. The software provides options for using any or all parts of the survey.

### Requirements:

- MS-Excel 2003 or MS-Excel 2007
- Windows skills:
  - Ability to navigate around in a Windows directory structure
  - Ability to create a new sub-directory
  - Ability to open, save, and close a file
- Specific skills in MS-Excel:
  - Ability to enter data in worksheets
  - Ability to navigate from worksheet to worksheet
  - Ability to unhide a worksheet
  - Ability to protect and unprotect a worksheet
  - Ability to save a file.

If you do not know how to do these specific actions in Excel, you can refer to the “Excel Skills You Need to Know” section of this manual for instructions.

### Files:

The AAIS consists of 5 files:

File Name	Purpose of each file
AAIS_Student_Survey.xls	Used by students to complete their survey.
AAIS_Survey_Reader.xls	Reads student survey files and creates reports and charts.
AAIS_Demographics.xls	Reads the AAIS_Student_Survey.xls file and creates reports by demographic data.
AAIS_Blank_File.xls	A blank survey file used to create student surveys.
AAIS_Users_Manual.pdf	This file.

Note that while the .xls files are in MS-Excel 2003 format, they can be used in MS-Excel 2007 in compatibility mode.

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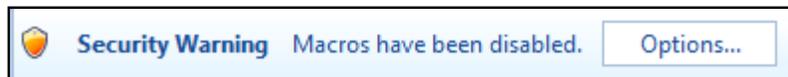
## Installation and Setup

Installing the AAIS is a simple straightforward process. Follow these steps:

1. On your computer, create a directory where you want to install the files.  
For example, you might create a directory called: C:\Excel\AAIS
2. Unzip the files and copy the 5 files of the AAIS to the directory you created in step 1.  
(See page 4 above for a list of the files).
3. Create a directory where you want the AAIS to save the student surveys.  
For example, you might create a directory called: C:\Excel\AAIS\Student\_Files

Now you have to tell the software where everything is and which parts of the 4 parts of the AAI you are going to use. Follow these steps:

4. Open the AAIS\_Student\_Survey.xls file.
5. If macros are not enabled in Excel, you may see this warning:



If you do see the above warning, click on “Options” and you will see this:



Click on “Enable this Content” and then click “OK”. Now macros are enabled for this program. Depending on your security settings, you may have to do this every time you open this file.

# Academic Advising Inventory System

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If you don't see the above warning message, you may see this security notice:



Click on the “Enable Macros” button. Now macros are enabled for this program. Depending on your security settings, you may have to do this every time you open this file. Your computer may have slightly different warnings, but the basic idea is to enable macros – however you have to do it on your computer.

6. Go to the “Parameters” worksheet. If you do not see the “Parameters” worksheet tab at the bottom of the screen, then it is hidden and you must unhide it.

Now you have to tell the software where everything is and which of the 4 parts of the AAI you are going to use.

7. In cell B4 you can change the name of the survey. Whatever you enter here will appear at the top of the “Main” worksheet.

As an example, you can enter “Hypothetical University Advising Survey”

8. In cell B7 indicate if you want to require students to enter their Student ID, Last Name, or nothing to identify their survey. If you select Student ID or Last Name, the student will be prompted to enter that information before taking the survey. That information will be used as the first part of the file name for their survey.

Student surveys are saved in this format:

(Student ID or Last Name or Nothing) 20YY-MM-DD Thh\_mm\_ss

Where YY=year, MM=month, DD=day, hh=hour, mm=minutes, and ss=seconds.

For example, this is a survey file name: A111222333 2008-5-10 T11\_38\_30.xls

This format allows every survey to have a unique file name.

9. In cell B9, enter where you want student files to be saved. You created that directory in step 3 above.

For example: C:\Excel\AAIS\Student\_Files\ (and don't forget the “\” at the end!)

# Academic Advising Inventory System

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10. In cell B10, enter the location of the AAIS\_Blank\_File.xls file. Note that this file is one of the five files of the AAIS. You already created the directory in step 3 above and copied the AAIS files to that directory.

For example: C:\Excel\AAIS\ (and don't forget the "\ " at the end!)

11. In cell B14, you can allow the student to leave survey questions blank by entering a "N". Be aware that if you enter "Y" to check for blank answers, not all questions are checked. These are the questions that are checked:

Part I: the first and last questions are required.

Part II: the first and last questions are required.

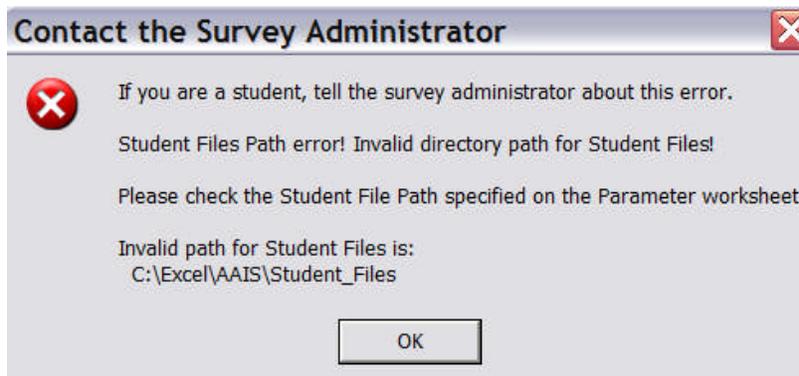
Part III: all 5 questions are required.

Part IV: 4 questions are required. (gender, age, academic class, and cultural/racial background.)

This is not intended to actually make the student answer each question on Part I and Part II. It is intended to at least make the student go to the various worksheets and answer some questions.

12. In cells B17-B20 you indicate if the various Parts of the survey are being used by entering a "Y" or a "N". At least one part of the survey must be selected.
13. Once you have finished entering information on the "Parameters" worksheet, you can Save the file.
14. After you have saved the file, go to the "Main" worksheet, and click on the "Save my Survey" button to setup this worksheet.

If you did not enter the correct information on the "Parameters" worksheet, then you will see an error message window. Depending on the error, it could look like this:



In this specific case, I incorrectly omitted the "\ " at the end of the directory path name.

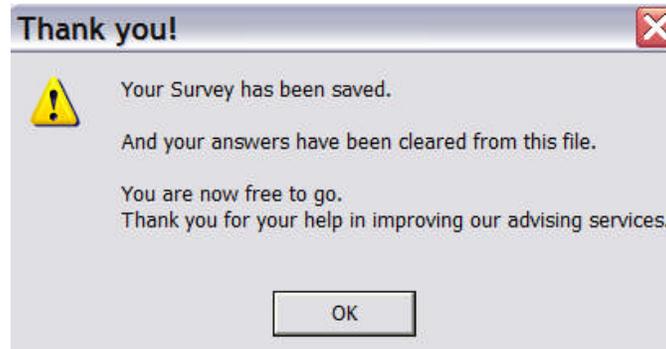
If you do receive an error, you will need to read the error message (maybe even write it down), and click on "OK". Then you need to unhide the "Parameters" worksheet, go fix

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the problem, and click on the “Save my Survey” button on the “Main” worksheet again to test everything again. Repeat this process until all errors are fixed.

If you entered valid information on the “Parameters” worksheet, you will see this after you click on the “Save my Survey” button on the “Main” worksheet:



15. Save the AAIS\_Student\_Survey.xls file to save all your parameters.
16. Go to the student files directory you created in step 5 above, and verify the survey you just created is there. You should delete any student surveys you created so they will not be counted in the reports.

And now you are ready for students to take the survey.

Notice that if you indicated on the “Parameters” worksheet that you are not using Part II then the Part II worksheet is hidden from the students (same for the other Parts also). And the line of instructions for Part II on the “Main” worksheet is hidden too.

# Academic Advising Inventory System

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## Taking a Survey

When you are ready for students to take a survey, open the AAIS\_Student\_Survey.xls file and go to the “Main” worksheet. The software is ready to go.

Now you just have to put a student in front of the computer and let them follow the instructions and complete the survey. If a student does not know how to use MS-Excel, you have a teaching opportunity! You can show them how to click on worksheet tabs to go to each part of the survey, how to page down, and how to click on the “Save my Survey” button when they are finished. Most students will catch on quickly.

When a student clicks on the “Save my Survey” button, their survey is renamed and the file is saved where you told it to be saved on the “Parameters” worksheet. Note that a new file is created for each student taking the survey. The software then clears the survey answers, clears the student’s ID or last name on the “Main” worksheet and is ready for the next student. There is no need for the advisor to do anything between students taking the survey.

At the end of the day you can just close the file. It can’t get much more simple than that.

# Academic Advising Inventory System

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## Creating Reports

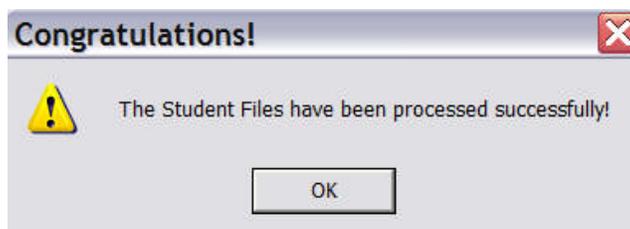
OK, so now you have a bunch of student surveys that have been saved in the location you indicated in step 3 above. Follow these steps to create reports and charts of the data:

17. Open the file AAIS\_Survey\_Reader.xls
18. You may have to enable macros just like you did in step 5 above.
19. On the “Main” worksheet, enter the location of the student files in cell B12.
20. Click on the “Process AAIS Student Files” button.

Depending on the number of student files being processed, this step may take a few minutes. Look at the status bar near the bottom of the screen on the left for the number of files that are being processed and which file is processed now.

On a reasonably fast computer it should take about 3 minutes to process 1000 student files. To process 9000 student surveys, the maximum number of student files the AAIS can process, the process should take about 27 minutes to complete.

21. If you did not enter the correct student file directory path on the “Main” worksheet, you will see an error message. Correct the location data on “Main” and try again.
22. If everything runs successfully, you will see this message:



Click on “OK” and then you are ready to view the report and chart worksheets. Enjoy!

Refer to <http://www.nacada.ksu.edu/Clearinghouse/Links/AAI%20Manual-02.pdf> for information on how to interpret the results of the AAI assessment instrument.

But what if you want to see the data by demographic group? For example, you may want to compare the answers of males and females. Or to compare freshmen with other academic classes. To generate those reports, follow these steps:

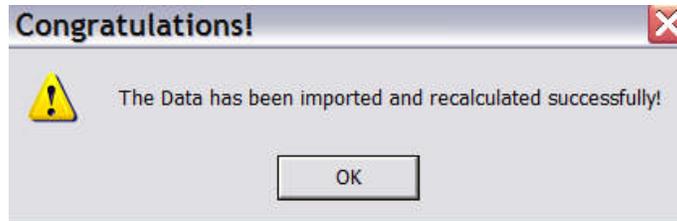
23. Open the file AAIS\_Demographics.xls  
This may take a few minutes while it recalculates.
24. You may have to enable macros just like you did in step 5 above.
25. On the “Main” worksheet, enter the location of the AAIS\_Survey\_Reader.xls file in cell B10.
26. Click on the “Create Detailed AAIS Reports” button.

## Academic Advising Inventory System

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Regardless of the number of student files being processed, this step will take about 3 minutes. Look at the status bar near the bottom of the screen for a progress percentage.

27. If you did not enter the correct directory path on the “Main” worksheet, you will see an error message. Correct the location data on the “Main” worksheet and try again.
28. If everything runs successfully, you will see this message:



Click on “OK” and then you are ready to view the report and chart worksheets.

# Academic Advising Inventory System

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## Advanced Uses of the AAIS

### Organizing your Files

After a while you may want to copy the student files somewhere else to make reporting easier and to be able to compare survey results by semester or by year. Here is an example of directory names you might use:

```
C:\Excel\AAIS\Student Files\2008_Fall  
C:\Excel\AAIS\Student Files\2008_Spring  
C:\Excel\AAIS\Student Files\2008_All
```

Be creative! Having different directories will enable you to run reports for individual semesters or for entire years. If you copy the 4 AAIS files to each directory then you will have reports to refer back to later. But as long as you have the student surveys, you can always regenerate the AAIS reports at any time.

### Customizing the Student Survey

If you want to remove some of the questions in Part IV of the survey, rows 46-92 for example, you can unprotect the “Part IV” worksheet with the password “aais”. Then you can hide the rows of the questions you do not want the students to answer. Be sure to protect the worksheet with the password “aais” again so students cannot change the worksheet later.

To hide rows in MS-Excel, unprotect the worksheet and then select the rows you want to hide and right click your mouse. Select ‘hide’.

If you want to change Part III, the password for the Part III worksheet is also “aais”.

### Manually completing the survey

If your students do not have access to a computer to take the survey, you can print the survey pages and they can complete the survey with a pen or pencil. Then you just have to have someone enter the survey’s into the software later.

# Academic Advising Inventory System

## Sample Survey, Reports and Charts

This is the first part of Part I of the survey.

ACADEMIC ADVISING INVENTORY									
Roger B. Winston, Jr. and Janet A. Sandor									
Part I									
<p>Part I of this Inventory concerns how you and your advisor approach academic advising. Even if you have had more than one advisor or have been in more than one type of advising situation this year, please respond to the statements in terms of your current situation.</p>									
<p>There are 14 pairs of statements in Part I. You must make two decisions about each pair in order to respond: (1) decide which one of the two statements most accurately describes the academic advising you received this year, and then, (2) decide how accurate or true that statement is (from very true to slightly true).</p>									
<p>Online Instructions: Click in the cell under the question (in the light blue) where you want to enter your answer and then enter an "X". You can also use the arrow keys to move.</p>									
EXAMPLE									
80. My advisor plans my schedule. <table border="1"><tr><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td></tr></table> very true ----- slightly true					OR My advisor and I plan my schedule together. <table border="1"><tr><td style="background-color: #e0f0ff;"> </td><td style="background-color: #0070c0;">X</td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td></tr></table> slightly true ----- very true		X		
	X								
<p>EXPLANATION: In this example, the student has chosen the statement on the right as more descriptive of his or her academic advising this year, and determined that the statement is toward the slightly true end (response F).</p>									
<p>Try it yourself! Enter an "X" in one of the light blue cells. That is all you need to do to answer a question.</p>									
1 My advisor is interested in helping me learn how to find out about courses and programs for myself. <table border="1"><tr><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td></tr></table> very true ----- slightly true					OR My advisor tells me what I need to know about academic courses and programs. <table border="1"><tr><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td></tr></table> slightly true ----- very true				
2 My advisor tells me what would be the best schedule for me. <table border="1"><tr><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td></tr></table> very true ----- slightly true					OR My advisor suggests important considerations in planning a schedule and then gives me responsibility for the final decision. <table border="1"><tr><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td><td style="background-color: #e0f0ff;"> </td></tr></table> slightly true ----- very true				

There are 14 questions in Part I.

# Academic Advising Inventory System

Here is the report from the AAIS\_Survey\_Reader.xls file.

<b>Part I Scales</b>		<u>Score</u>	<u>Range</u>
Developmental-Prescriptive (DPA)		81.9	(14-112)
Personalizing Education (PE)		47.1	(8-64)
Academic Decision-Making (ADM)		23.8	(4-32)
Selecting Courses (SC)		11.0	(2-16)

<b>Part II Scales</b>		<u>Avg Score (0-5)</u>
Personal Development and Interpersonal Relationships (PDIR)		1.0
Exploring Institutional Policies (EIP)		0.9
Registration and Class Scheduling (RCS)		1.1
Teaching Personal Skills (TPS)		1.0
Academic Majors and Courses (AMC)		0.8

<b>Part III Scales</b>		<u>Score</u>	<u>Scale</u>
Student Satisfaction		2.9	(1-2-3-4)

<b>Part IV Demographic Information</b>			
Total Number of Student Files	24		
Males	14	64%	
Females	8	36%	
African American/Black	5	24%	
Hispanic American/Latino/a	4	19%	
Asian American	4	19%	
Native American	0	0%	
White/Caucasian	7	33%	
Biracial/multiracial	0	0%	
Other	0	0%	
Decline to respond	1	5%	
Freshman (first year)	5	24%	
Sophomore (second year)	2	10%	
Junior (third year)	8	38%	
Senior (fourth)	4	19%	
5th Year Senior	1	5%	
Irregular/Transient/Special	0	0%	
Other than any of the above	1	5%	

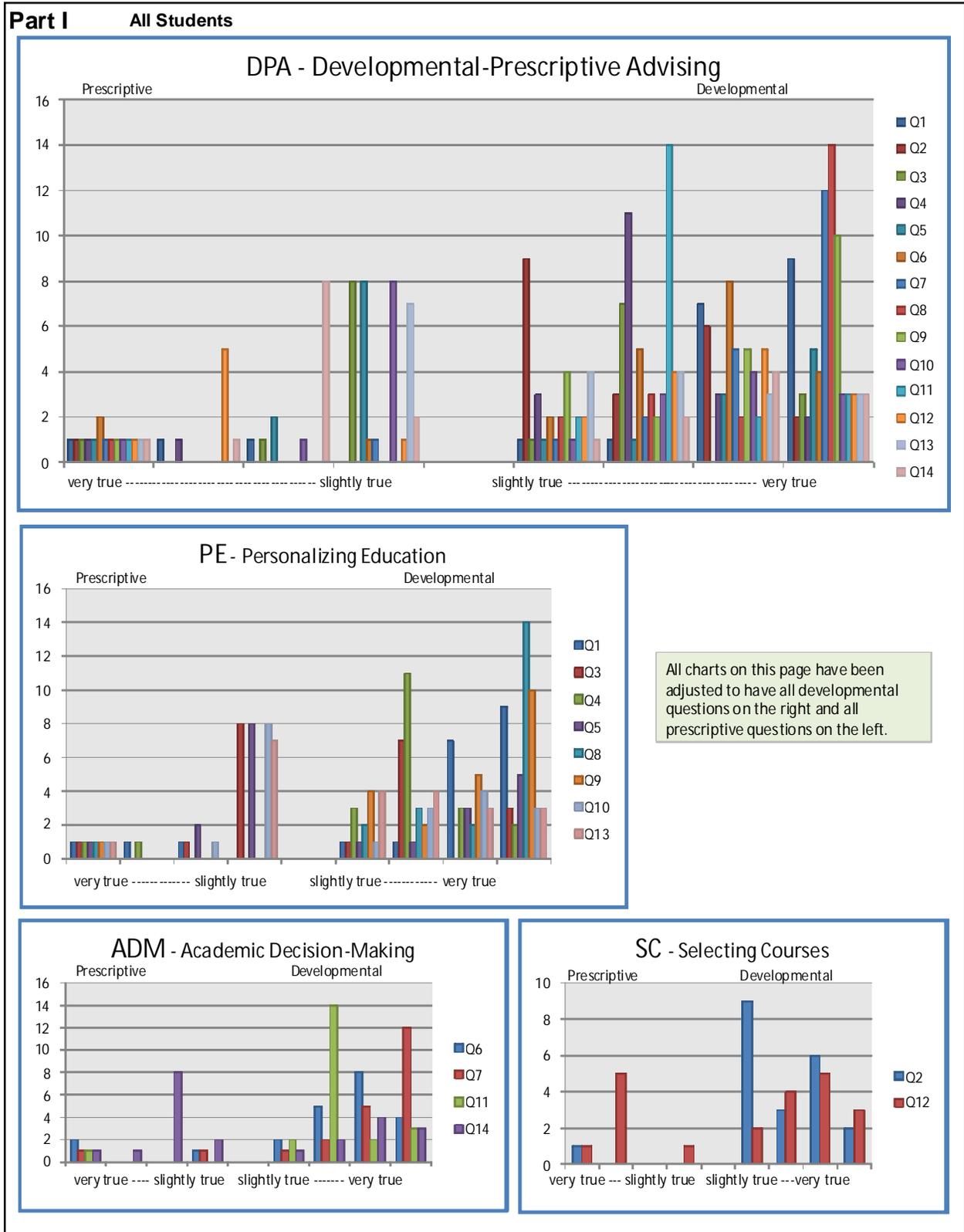
  

<b>Exception Report</b>		
files with no errors		17
files with errors		7
files with at least one duplicate answer		3
files with at least one blank answer		5
questions with duplicate answers		74
questions with no answers		70

Note: Questions with errors in Part I will lower the score for Part I scales.

# Academic Advising Inventory System

Here are a few of the many charts included in the AAIS:



# Academic Advising Inventory System

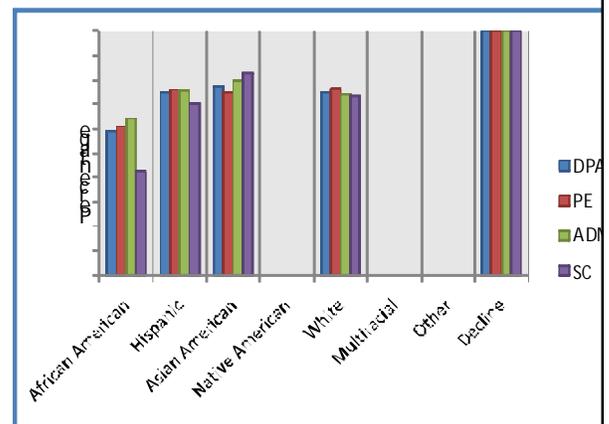
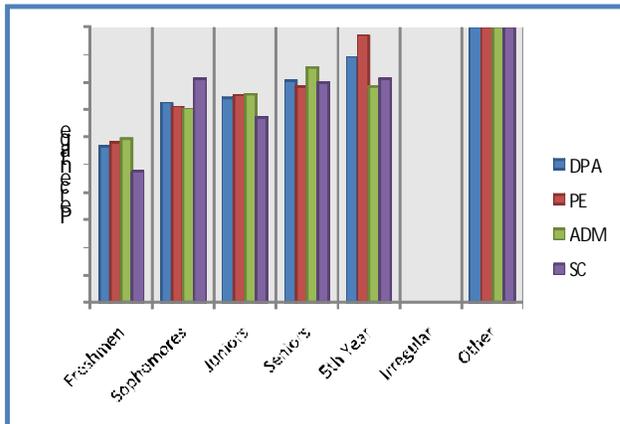
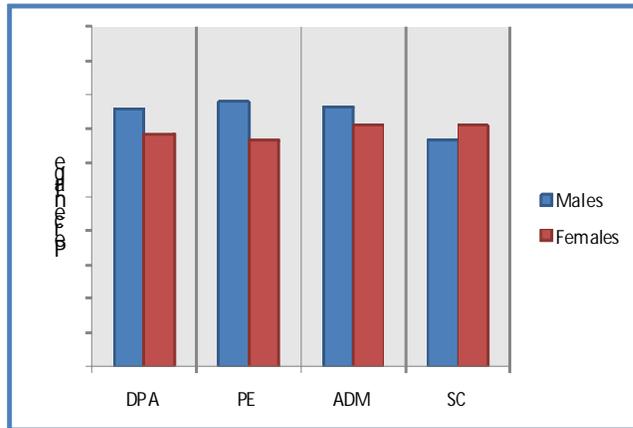
Here is the report from the AAIS\_Demographics.xls file.

<b>Part I Scales</b>	(14-112)	(8-64)	(4-32)	(2-16)	scales:				
	<b>DPA</b>	<b>PE</b>	<b>ADM</b>	<b>SC</b>	(14-112)	(8-64)	(4-32)	(2-16)	
					<b>DPA</b>	<b>PE</b>	<b>ADM</b>	<b>SC</b>	
All	81.9	47.1	23.8	11.0	African American	66.6	39.2	20.6	6.8
					Hispanic	84.3	48.8	24.3	11.3
Males	85.0	49.8	24.5	10.7	Asian American	86.8	48.0	25.5	13.3
Females	76.8	42.6	22.8	11.4	Native American				
					White	84.3	48.9	23.7	11.7
Freshmen	63.8	37.2	19.0	7.6	Multiracial				
Sophomores	81.0	45.5	22.5	13.0	Other				
Juniors	83.1	48.1	24.3	10.8	Decline	112.0	64.0	32.0	16.0
Seniors	90.3	50.3	27.3	12.8					
5th Year	100.0	62.0	25.0	13.0					
Irregular									
Other	112.0	64.0	32.0	16.0					
<b>Part II Scales</b>					<b>scale = 0-1-2-3-4-5</b>				
	<b>PDIR</b>	<b>EIP</b>	<b>RCS</b>	<b>TPS</b>	<b>AMC</b>				
All	1.0	0.9	1.1	1.0	0.8				
						<b># Students</b>			
Males	1.2	1.1	1.2	1.1	1.0	14			
Females	0.7	0.5	0.9	0.9	0.6	8			
Freshmen	0.7	0.6	0.8	0.8	0.6	5			
Sophomores	0.5	0.3	0.9	0.7	0.5	2			
Juniors	0.9	0.7	1.0	0.8	0.7	8			
Seniors	0.9	0.6	0.9	0.9	0.5	4			
5th Year	1.1	1.2	1.0	0.7	0.7	1			
Irregular						0			
Other	5.0	5.0	5.0	5.0	5.0	1			
African American	0.6	0.8	0.7	0.7	0.4	5			
Hispanic	1.1	0.5	1.0	0.8	0.7	4			
Asian American	0.9	0.7	1.0	0.8	0.5	4			
Native American						0			
White	0.8	0.7	1.0	0.9	0.7	7			
Multiracial						0			
Other						0			
Decline	5.0	5.0	5.0	5.0	5.0	1			
<b>Part III Scales</b>					<b>scale = 1-2-3-4</b>				
	<b>Student Satisfaction</b>				<b>Student Satisfaction</b>				
All	2.9								
Males	3.1				African American	2.5			
Females	2.6				Hispanic	3.1			
Freshmen	2.5				Asian American	2.9			
Sophomores	2.9				Native American				
Juniors	3.0				White	3.0			
Seniors	3.0				Multiracial				
5th Year	2.8				Other				
Irregular					Decline	4.0			
Other	4.0								

# Academic Advising Inventory System

Here are a few of the many charts from the AAIS\_Demographics.xls file.

## Part I



# Academic Advising Inventory System

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## Basic Excel Skills You Need to Know

### For MS-Excel 2007:

How to navigate from worksheet to worksheet:

At the bottom of the Excel screen are worksheet tabs.

In a new Excel file, the file will contain worksheets named, “Sheet 1”, “Sheet 2”, and the like. In the AAIS, you will see worksheet names like, “Parameters”, “Part I”, “Reports”, “Charts” and “Main”.

To move from one worksheet tab to another, left click on the worksheet tab you want to go to.

How to unhide a worksheet:

To unhide a worksheet, right-click on any worksheet tab and select “unhide” from the popup menu. If more than one worksheet is hidden, then you will then have to select which worksheet you want to unhide.

How to hide a worksheet:

To hide a worksheet, right-click on any worksheet tab and select “hide” from the popup menu.

How to protect a worksheet:

To protect a worksheet, click on the “Home” tab of the Ribbon. Then click on “Format”. Then click on “Protect Sheet”. A popup dialogue box will be displayed and you can either press “OK” to protect the worksheet without a password, or you can enter a password and then press “OK”. You will be required to enter the password again to confirm you remember it.

How to unprotect a worksheet:

To unprotect a worksheet, click on the “Home” tab of the Ribbon. Then click on “Format”. Then click on “Unprotect Sheet”. If the worksheet is protected by a password, a popup dialogue box will be displayed and you will have to enter the password and click on “OK” to unprotect the worksheet.

# Academic Advising Inventory System

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## **For MS-Excel 2003:**

How to navigate from worksheet to worksheet:

At the bottom of the Excel screen are worksheet tabs.

In a new Excel file, the file will contain worksheets named, “Sheet 1”, “Sheet 2”, and the like. In the AAIS, you will see worksheet names like, “Parameters”, “Part I”, “Reports”, “Charts” and “Main”.

To move from one worksheet tab to another, left click on the worksheet tab you want to go to.

How to unhide a worksheet:

To unhide a worksheet, select the Format menu item at the top of the screen. Click on Sheet, and then click on Unhide. Then select the worksheet you want to unhide.

How to hide a worksheet:

First go to the worksheet you want to hide. Then select the Format menu item at the top of the screen, and then click on Sheet. Then click on Hide.

How to protect a worksheet:

To protect a worksheet, first go to the worksheet you want to protect. Then select the Tools menu item at the top of the screen. Click on Protection and then click on Protect Sheet. A popup dialogue box will be displayed and you can either press “OK” to protect the worksheet without a password, or you can enter a password and then press “OK”. You will be required to enter the password again to confirm you remember it.

How to unprotect a worksheet:

To unprotect a worksheet, Select the Tools menu item at the top of the screen. Then click on “Format”. Then click on “Unprotect Sheet”. If the worksheet is protected by a password, a popup dialogue box will be displayed and you will have to enter the password and click on “OK” to unprotect the worksheet.