



Guidelines for Maintaining Correct Advisor Information for Students

Maintenance of advisor information supports DU's advising activities. Correct advisor information permits students to identify and contact advisors through the Inspire advising platform, PioneerWeb and the Degree Audit; it enables several web-based advising tools for advisors; it informs advisors and University officials of advising relationships.

Academic departments should assign and maintain accurate faculty advisor information in Banner for undergraduate and graduate students earning a degree in their areas. Academic departments should update advisor assignments in Banner as undergraduate students declare majors and/or graduate students enter their degree programs. Departments should additionally check advising assignments quarterly to ensure assignments are accurate and up-to-date.

UNDERGRADUATE STUDENTS

Advisor data also determines the distribution of registration for first-year undergraduate students. First-year seminar instructors serve as undergraduate students' primary advisors for their first year at DU. These advisor assignments are automatically assigned in Banner. Undergraduates may also have other active advisors assigned.

Academic departments should maintain accurate faculty academic advisor information. However, first-year seminar advisors should be maintained as the primary advisor in addition to faculty academic advisors for undergraduates' first year at DU. When the student reaches sophomore status, the first-year seminar advisor will be removed and students will be handed off to either a major advisor or academic program advisor (if declared) or to work with a staff academic advisor (if undeclared).



Quick Guide Overview

To ensure accurate advisor assignments for students in your academic department, users should use the [Inspire](#) advising platform to view and assess current advising caseloads, as well as determine next steps for using Banner to add, remove, or update advisor assignments for DU students. The first part of this tutorial details the method to view and assess current advising caseloads for an academic department. The second part of this tutorial focuses on how to use Banner to add, remove, or update the advisor assignments that are pulled into Inspire.

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Advisor Assignment Assessment Checklist

Reviewing and assessing advisor assignments should include the following conditions:

- ☐ Assigning advisors to students who have **no** faculty advisor assignment but **do** have a declared major/degree
- ☐ Updating/removing advisors for students who have **no** declared major but **do** have a faculty advisor assignment (this may indicate the student has changed majors and may warrant student outreach for confirmation)
- ☐ Removing advisors from students who have graduated from their academic program
- ☐ Temporarily updating advisor assignments for faculty advisors on leave from DU
- ☐ Removing and reassigning advisors for faculty advisors who have left the University



Advisor types

Outlined below are the most commonly used advisor types available for faculty and staff at both the graduate and undergraduate levels.

ADVISOR TYPE	BANNER CODE	DESCRIPTION
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GRADUATE ADVISOR TYPES

GRADUATE PROGRAM ADVISOR	GRAD	ASSIGNED TO FACULTY OR STAFF WHO ARE ADVISING ON GRADUATE PROGRAM REQUIREMENTS
GRADUATE DISSERTATION OR THESIS ADVISOR	DISS	ASSIGNED TO APPOINTED FACULTY WHO ARE PROVIDING DISSERTATION OR THESIS ADVISING
GRADUATE PRACTICUM OR INTERNSHIP ADVISOR	PRAC	ASSIGNED TO FACULTY OR STAFF WHO ARE PROVIDING PRACTICUM OR INTERNSHIP ADVISING

UNDERGRADUATE ADVISOR TYPES

ACADEMIC ADVISOR	STAC	ASSIGNED TO STAFF ACADEMIC ADVISORS IN THE OFFICE OF ACADEMIC ADVISING
ACADEMIC PROGRAM ADVISOR	PROG	ASSIGNED TO STAFF ACADEMIC ADVISORS HOUSED WITHIN ACADEMIC UNITS
ATHLETICS ADVISOR	ATHL	ASSIGNED TO ADVISORS OF STUDENTS PARTICIPATING IN DU ATHLETICS TEAMS
FACULTY ACADEMIC ADVISOR	MAJR	ASSIGNED TO FACULTY WHO ARE ADVISING ON UNDERGRADUATE MAJOR REQUIREMENTS
FIRST-YEAR SEMINAR ADVISOR	UDCC	ASSIGNED TO FIRST-YEAR SEMINAR FACULTY ADVISORS
HONORS ADVISOR	HNRS	ASSIGNED TO ADVISORS OF STUDENTS PARTICIPATING IN THE HONORS PROGRAM
LEARNING EFFECTIVENESS COUNSELOR	LEP	ASSIGNED TO COUNSELORS OF STUDENTS PARTICIPATING IN THE LEARNING EFFECTIVENESS PROGRAM (LEP)



Advisor Assignment Annual Timeline

The annual timeline below should be used as a general guideline for consistently evaluating **undergraduate** advising assignments to ensure accuracy and proper documentation of advising relationships on campus.

Overview: regular review timeline

- Week(s) 0-2 of each quarter: Departments review advisor assignments.
- Ongoing: As a student declares a major, the faculty/program advisor should be assigned

MAY

After May 1st, Academic Advising will assign incoming undergraduate students to Academic Advisors (STAC) and Academic Program Advisors (PROG), if applicable.

Incoming Undergraduate Students

JUNE

- Registrar's office will remove First-Year Seminar (UDCC) advisors for rising 2nd-year students.
- Academic departments will evaluate and assign rising 2nd-year declared majors to Faculty Academic Advisor(s) (MAJR).

Continuing Undergraduate Students

- Academic departments will evaluate and assign incoming declared majors to Faculty Academic Advisor(s) (MAJR).

Incoming Undergraduate Students

SEPTEMBER

Students assigned to First-Year Seminar (UDCC) faculty advisor, who will act as the primary advisor for the entire first year.

Incoming Undergraduate Students

In weeks 1-2 of quarter, academic departments will evaluate and assign advising caseloads.

Continuing Undergraduate Students

JANUARY

In weeks 1-2 of quarter, academic departments will evaluate and assign advising caseloads.

Continuing Undergraduate Students

MARCH

In weeks 1-2 of quarter, academic departments will evaluate and assign advising caseloads.

Continuing Undergraduate Students

ONGOING

Upon declaration of major, academic departments will assign declared majors to Faculty Academic Advisor(s) (MAJR) (*rolling basis*).

Continuing Undergraduate Students



Overview

This tutorial details the method to view and assess current advising caseloads for an academic department. Please see the "Adding, Removing, and Updating Advisors in Banner" section below for how to add, remove, or update the advisor assignments that are pulled into Inspire.

1 Viewing assigned advisors for students with declared majors and/or degree programs



Login to Inspire

Users can login to Inspire by navigating to <https://du.inspire.civitaslearning.com>

Be sure to login using the "Log in with DU Email" option



NETID EMAIL

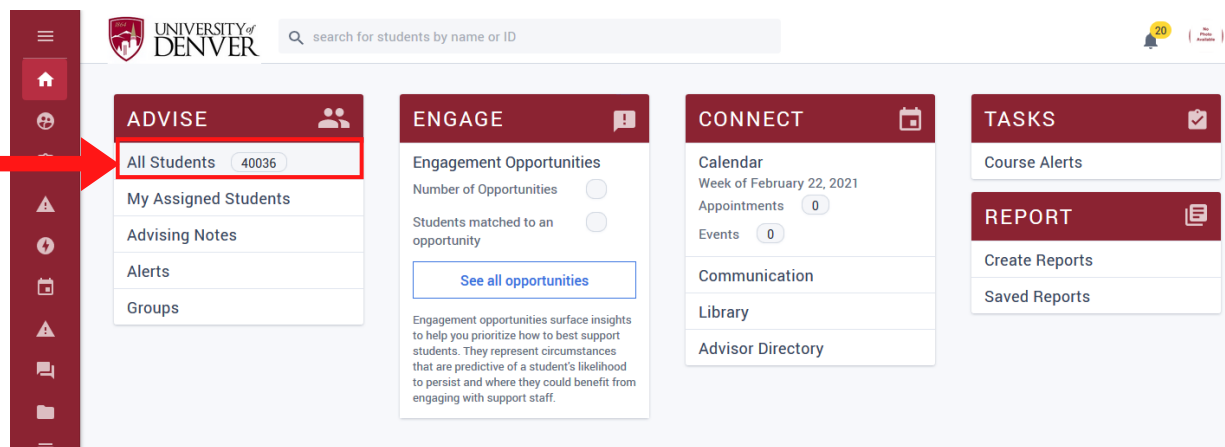
LOGIN WITH DU EMAIL

Don't have an active NetID? Click the "Email" text above to log in with your email and password.

STEP 01

Navigate to All Students

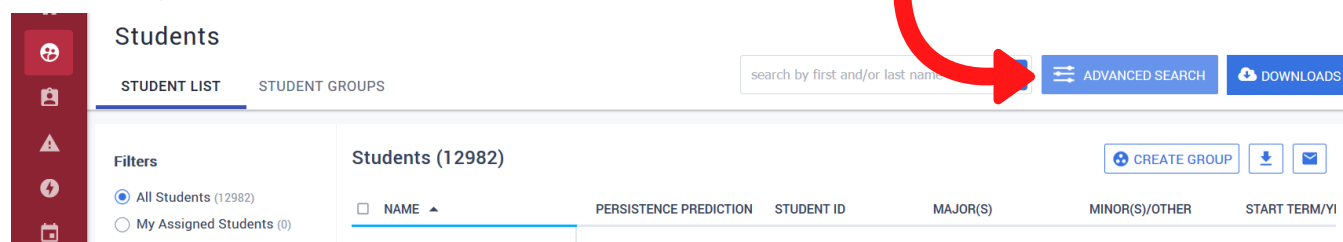
Upon logging in, users will arrive to the Inspire dashboard. Click the "All Students" tab under the Advise tile to navigate to a list of all DU students.



STEP 02

Use the Advanced Search to find distinct groups of students

To search for students based on selected criteria (i.e. major, degree, etc.), select the blue "Advanced Search" option above the list of students.



- 1 Select "**All Students**" to ensure all students with major/degree criteria will surface in your search.
- 2 Choose to include **Active** students or **both Active** and **Inactive** students in your search.

"**Active**" students are:

- students who are currently taking courses in a live term.

"**Inactive**" students are:

- not currently registered for courses in a live term
- incoming admitted students
- students who were previously registered for courses in the last 3 calendar years (including graduated students).

Students Advanced Search

Student name(s) or ID(s)

- OR -

Search based on:

Students

☒ All
☐ My Assigned

☒ Active
☐ Inactive

Persistence Prediction

☐ Very Low
☐ Low
☐ Moderate

Below the persistence information, 7 categories of filters are available to filter for distinct groups of students. It is important to note that Inspire filters operate using "and" logic, meaning that students will only appear in the results if they meet **ALL** selected criteria.

When desiring to view **active** students who have a listed major or degree program in an academic area, it is recommended to use the **1 Major(s)** and/or **2 Degree Program(s)** filters to search for students in that academic discipline. It is also recommended to use the **3 "Enrolled Next Term"** filter as a proxy for students who are or will be registered/active for a given quarter (note: not using this filter may yield results that includes graduated students). Lastly, check next to the advisor types (i.e. **4 Faculty Academic Advisor**, etc.) you would like to see for the group of students in order to display current advisor assignments, if they exist.

When you have entered all search criteria, select the blue "search" button at the bottom of the screen.

Academic Information

+ Degree

✓ Major(s)

1 PSYC-MAJOR-SS-PSYC-BS-Psychology

+ Minor(s)/other

+ Department

+ College

+ GPA

+ Academic Standing

✓ Enrolled Next Term

3 Fall-2021

+ FTPT

✓ Academic Level

Undergraduate

+ Undergraduate Type

+ Leave of Absence: Expected Return Term

✓ Degree Program

2 Bachelor of Science-Social Sci(BS-SOC SCI)

Progress to Degree

+ Start Term/Year

+ Total Institutional Credits Earned

+ Completed Terms

+ Applied to Graduate

+ Graduation Application Term

+ Transfer Credits

Courses

+ Term

+ Course Number

+ Section ID

+ Grade

+ Credits

+ Instructor

Enrollment

+ Term of Enrollment

+ Enrolled In Active Term

Advising

+ Athletics Advisor

+ Dissertation Advisor

+ DSP Advisor

+ Graduate Program Advisor

+ Honors Advisor

+ Inspire General User

+ LEP Advisor

✓ Faculty Academic Advisor

4 Faculty Academic Advisor

☐ select all

+ Minor Advisor

+ Grad Internship/Practicum Advisor

+ Academic Program Advisor (UG)

+ Staff Academic Advisor

+ First-year Seminar Advisor

+ Student has scheduled or completed an Inspire appointment

+ Holds

+ Student Modality

+ Financial Aid

Academic Alerts

+ Type

+ Status

CANCEL RESET SEARCH

It may additionally be helpful to complete a separate search for students who are currently on a **Leave of Absence**, but will be returning in an upcoming term to ensure they have an assigned advisor in your academic unit. To complete this search, you will include the same elements from the search above, but you will uncheck the "**Enrolled Next Term**" filter (unless you would like to see whether students on a Leave of Absence have already registered) and select the desired term for the "**Leave of Absence: Expected Return Term**" filter. This will produce a list of students who intend to return in the term you specified, which may be helpful for outreach regarding registration or any other applicable policies.

The screenshot displays a search interface with a sidebar on the left containing icons for various functions. The main content area is divided into several filter categories:

- Academic Information**
 - + Degree
 - + Major(s): PSYC-MAJOR-SS-PSYC-BS-Psychology
 - + Minor(s)/other
 - + Department
 - + College
 - + GPA
 - + Academic Standing
 - + Enrolled Next Term
 - + FPTT
 - + Academic Level: Undergraduate
 - + Undergraduate Type
 - + Leave of Absence: Expected Return Term: Winter 2022 (highlighted with a red box)
 - + Degree Program: Bachelor of Science-Social Sci(BS-SOC SCI)
- Progress to Degree**
 - + Start Term/Year
 - + Total Institutional Credits Earned
 - + Completed Terms
 - + Applied to Graduate
 - + Graduation Application Term
 - + Transfer Credits
- Courses**
 - + Term
 - + Course Number
 - + Section ID
 - + Grade
 - + Credits
 - + Instructor
- Enrollment**
 - + Term of Enrollment
 - + Enrolled In Active Term
- Advising**
 - + Athletics Advisor
 - + Dissertation Advisor
 - + DSP Advisor
 - + Graduate Program Advisor
 - + Honors Advisor
 - + Inspire General User
 - + LEP Advisor
 - + Faculty Academic Advisor: Faculty Academic Advisor
 - ☐ select all
 - + Minor Advisor
 - + Grad Internship/Practicum Advisor
 - + Academic Program Advisor (UG)
 - + Staff Academic Advisor
 - + First-year Seminar Advisor
 - + Student has scheduled or completed an Inspire appointment
 - + Holds
 - + Student Modality
 - + Financial Aid
- Academic Alerts**
 - + Type
 - + Status

STEP 03

Add additional columns, view/edit search criteria, and/or download student list

A list of students matching the selected criteria will surface. From here, you can **1** add additional columns of student information, **2** go back and edit the search criteria, and/or **3** download the list of students into an Excel spreadsheet.

The screenshot shows the student search interface. On the left, a sidebar contains a red box labeled **1** around the 'Add/remove Columns' section, which lists various student information categories like Academic Information and Demographics. In the center, the 'Search Criteria' section has a red box labeled **2** around the 'EDIT SEARCH' button. On the right, the 'Students' section shows a list of search results with columns for NAME, PERSISTENCE PREDICTION, STUDENT ID, and MAJOR(S). A red box labeled **3** is around the 'DOWNLOAD' button in the top right corner. A 'Downloads' pop-up window is visible on the right, showing a download link for 'Students 2021-02-26 15:19:10' with a green status 'ready to download' and a red arrow pointing to the download icon. A yellow callout box says: 'When download is ready, click the arrow to download list into Excel.'

Note: you may need to use the horizontal scroll bar to see all columns of information

STEP 03 Open Excel document and format spreadsheet for desired utility

Upon opening the student list in Excel, several things may need to be formatted to maximize report utility. For example, students may have more than one major or degree program falling into a single column. A comma denotes differentiation of another major and/or degree program (denoted in red below).

1	A	B	C	D	E	G
	FIRST NAME	LAST NAME	STUDENT ID	MAJOR(S)	DEGREE PROGRAM	START TERM/YEAR
2	Rachel	Cuda	873277576	BIOL-MAJOR-NM-BIOL-BS-Biological Sciences, PSYC-MAJOR-SS-PSYC-BS-Psychology	Bachelor of Science-Social Sci(BS-SOC SCI)	FALL 2017
3	Sasha	Davies	873547399	ENVI-MAJOR-NM-GEOG-BS-Environmental Science, PSYC-MAJOR-SS-PSYC-BS-Psychology	Bachelor of Science-Social Sci(BS-SOC SCI)	FALL 2019
4	Camille	Abelanet	873277678	PSYC-MAJOR-SS-PSYC-BS-Psychology	Bachelor of Science-Social Sci(BS-SOC SCI), Master of Arts-Social Sci(MA-SOC SCI)	FALL 2017
5	Tom	Adams	873482630	PSYC-MAJOR-SS-PSYC-BS-Psychology	Bachelor of Science-Social Sci(BS-SOC SCI)	FALL 2017
6	Fern	Arce	873270575	PSYC-MAJOR-SS-PSYC-BS-Psychology	Bachelor of Science-Social Sci(BS-SOC SCI)	FALL 2017
7	Alisha	Azam	873269531	PSYC-MAJOR-SS-PSYC-BS-Psychology	Bachelor of Science-Social Sci(BS-SOC SCI)	FALL 2017

Students with multiple majors and degrees will have all information fall into one column. Majors and degrees are delineated by a **comma**.

For students with multiple majors and/or degree programs, you can separate the majors and degree programs into distinct columns. To do so, follow these steps:

- 1 Add blank columns next to the field you'd like to separate out (it is recommended to add as many columns as the entry with the highest number of listed majors/degree programs).

1	FIRST NAME	LAST NAME	STUDENT ID	MAJOR(S)	MAJOR 2	MAJOR 3	DEGREE PROGRAM	ST
2	Rachel	Cuda	873277576	BIOL-MAJOR-NM-BIOL-BS-Biological Sciences, PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI)	FA
3	Sasha	Davies	873547399	ENVI-MAJOR-NM-GEOG-BS-Environmental Science, PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI), Master of Arts-Social Sci(MA-SOC SCI)	FA
4	Camille	Abelanet	873277678	PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI)	FA
5	Tom	Adams	873482630	PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI)	FA
6	Fern	Arce	873270575	PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI)	FA

- 2 Highlight the column you'd like to separate out (Major(s), for instance), then go to the **Data** tab and then select **Text to Columns**.

1	FIRST NAME	LAST NAME	STUDENT ID	MAJOR(S)	MAJOR 2	MAJOR 3	DEGREE PROGRAM	ST
2	Rachel	Cuda	873277576	BIOL-MAJOR-NM-BIOL-BS-Biological Sciences, PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI)	FA
3	Sasha	Davies	873547399	ENVI-MAJOR-NM-GEOG-BS-Environmental Science, PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI)	FA
4	Camille	Abelanet	873277678	PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI), Master of Arts-Social Sci(MA-SOC SCI)	FA
5	Tom	Adams	873482630	PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI)	FA

- 3 Choose "**Delimited**" and click Next. Select "**Comma**" under **Delimiters**. Click Next. Click Finish. Lastly, A message may pop up: "There's already data here. Do you want to replace it?" Click **OK**.

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☐ Tab

☐ Semicolon

☒ Comma

☐ Space

☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier:

Data preview

MAJOR(S)

BIOL-MAJOR-NM-BIOL-BS-Biological Sciences PSYC-MAJOR-SS-PSYC-BS-Psychology

ENVI-MAJOR-NM-GEOG-BS-Environmental Science PSYC-MAJOR-SS-PSYC-BS-Psychology

PSYC-MAJOR-SS-PSYC-BS-Psychology

PSYC-MAJOR-SS-PSYC-BS-Psychology

Buttons: Cancel, < Back, Next >, Finish

Microsoft Excel

There's already data here. Do you want to replace it?

Buttons: OK, Cancel

- 4 You will now see majors separated into distinct columns.

1	FIRST NAME	LAST NAME	STUDENT ID	MAJOR(S)	MAJOR 2	MAJOR 3	DEGREE PROGRAM	STAR
2	Rachel	Cuda	873277576	BIOL-MAJOR-NM-BIOL-BS-Biological Sciences	PSYC-MAJOR-SS-PSYC-BS-Psychology		Bachelor of Science-Social Sci(BS-SOC SCI)	FALL
3	Sasha	Davies	873547399	ENVI-MAJOR-NM-GEOG-BS-Environmental Science	PSYC-MAJOR-SS-PSYC-BS-Psychology		Bachelor of Science-Social Sci(BS-SOC SCI)	FALL
4	Camille	Abelanet	873277678	PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI), Master of Arts-Social Sci(MA-SOC SCI)	FALL
5	Tom	Adams	873482630	PSYC-MAJOR-SS-PSYC-BS-Psychology			Bachelor of Science-Social Sci(BS-SOC SCI)	FALL

- 5 You can use the same process to separate advisors of the same type into distinct columns (**note:** advisors of different types (i.e. Faculty Academic Advisors and Graduate Program Advisors) will fall into distinct columns on their own upon downloading the report). It is important to note that the delimiter for advisors is a **semicolon**, not a comma.

1	FACULTY ACADEMIC ADVISOR	FACULTY ADVISOR 2	FACULTY ADVISOR 3	START TERM/YEAR	COLLEGE
2	(2) Reichmann-Decker, Aimee; Sasaki, Nancy			FALL 2017	Social Sciences(SS)
3	(2) Miller, Pamela; Hamann, Hillary			FALL 2017	Social Sciences(SS)
4				FALL 2017	Social Sciences(SS)
5					

Advisors of the same type are delineated by a **semicolon** as opposed to a comma. Be sure to choose correct delimiter in **Text to Columns** options.

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☐ Tab

☒ Semicolon

☐ Comma

☐ Space

☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier:

Data preview

FACULTY ACADEMIC ADVISOR

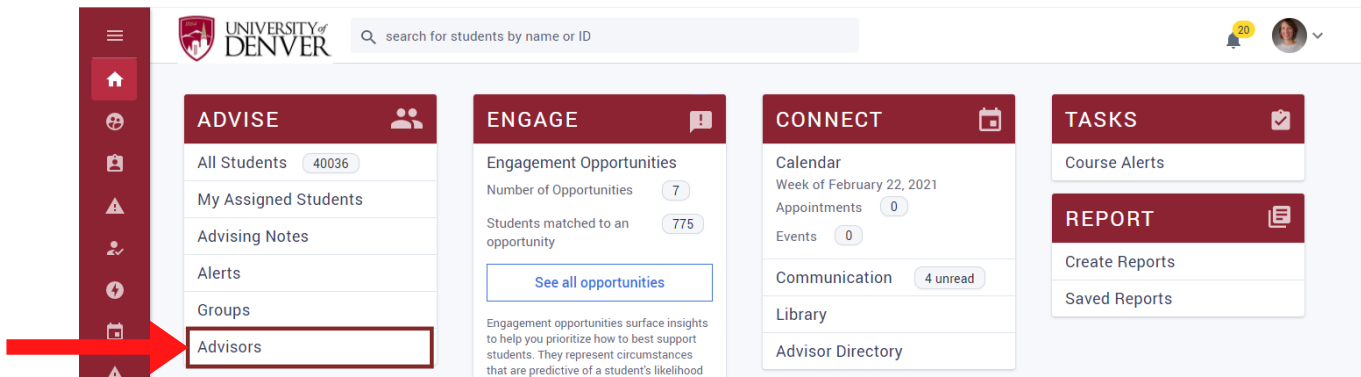
(2) Reichmann-Decker, Aimee Sasaki, Nancy

(2) Miller, Pamela Hamann, Hillary

Buttons: Cancel, < Back, Next >, Finish

2 Viewing current advising caseloads for a particular faculty or staff advisor

Follow the steps below to view the **current** advising caseloads for a given faculty or staff advisor. On the Inspire dashboard, click the **Advisors** tab under the **Advise** tile.



There are several tools available to pare down the list of advisors:

- 1 **Active** versus **Inactive** status (Inactive is usually reserved for employees no longer at DU).
- 2 **Advisor type**.
- 3 Additionally, search for advisors directly by using the **search bar**.
- 4 Lastly, **add or remove columns** of advising caseload and activity information.

From here, you can either:

- 5 Download an overview of advising information (to view caseload or advising activity comparisons such as available appointments, number of advising notes, or system login info *across advisors*).
- 6 Click an advisor's name to get the detailed list of students assigned to their advising caseload (note: remember to select **active** and **inactive** students to see ALL students for a given advisor. Again, as a proxy, you can add the "**Enrolled Next Term**" column to get a sense of which students will actually be enrolled in the upcoming term.).

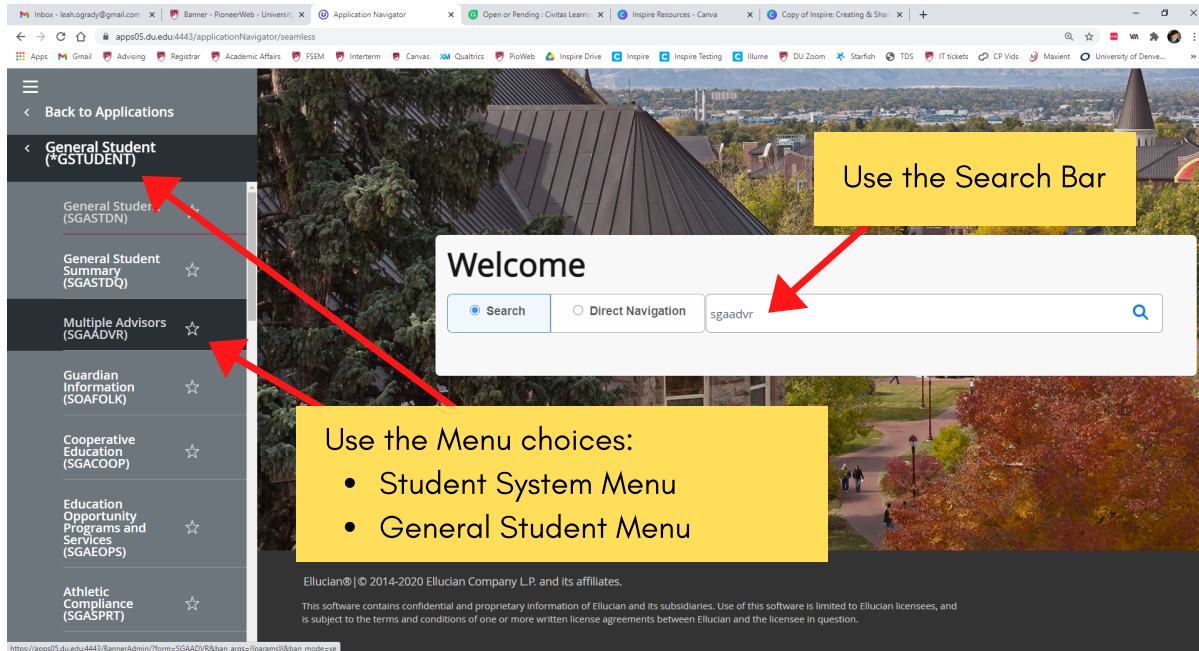
The screenshot shows the 'Advisors' page in Inspire. The page has a search bar at the top right (labeled 3) and a 'DOWNLOADS' button (labeled 5). The left sidebar has filters for Status (labeled 1) and Advisor Type (labeled 2). The main content area shows a table of advisors (labeled 6) with columns for Name, Status, Advisor Type, Assigned Students, Available Appts, and Scheduled Appts. A red arrow points to the 'Abroad, DU' advisor name, and a yellow callout box says 'Click the name of the advisor to get a list of students assigned to their advising caseload.'

NAME	STATUS	ADVISOR TYPE	ASSIGNED STUDENTS	AVAILABLE APPTS	SCHEDULED APPTS
Abroad, DU	Active	--	0	0	0
[Redacted]					0
[Redacted]					0
[Redacted]					0
[Redacted]	Active	Inspire General User	0	0	0
Advising (Undergradu...	Active	Inspire General User	0	0	0
AdvisorplusSSU1, De...	Active	--	0	0	2
AdvisorplusSSU2, De...	Active	--	0	0	0
AdvisorplusSSU3, De...	Active	--	0	0	0
AdvisorplusSSU4, De...	Active	--	0	0	0
AdvisorplusSSU5, De...	Active	--	0	0	0
AdvisorSSU1, Demo	Active	Inspire General User	0	0	1

1

Getting to Multiple Advisors (SGAADVR) Screen

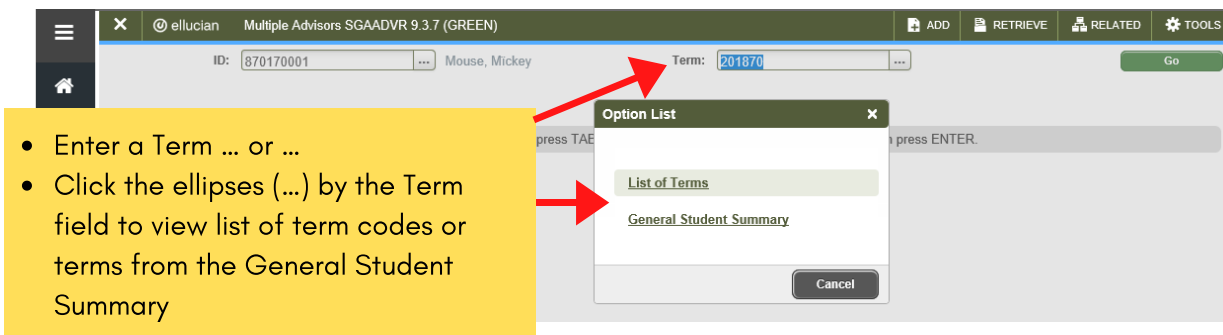
- STEP 01** Log in to iBanner.
- Select Multiple Advisors page, **SGAADVR**, from the General Student Menu or type in **SGAADVR** in the **SEARCH BAR** on the **LANDING PAGE**. If you are in the General Student Page (**SGASTDN**), click Assign Advisors to Student on the **RELATED MENU**.



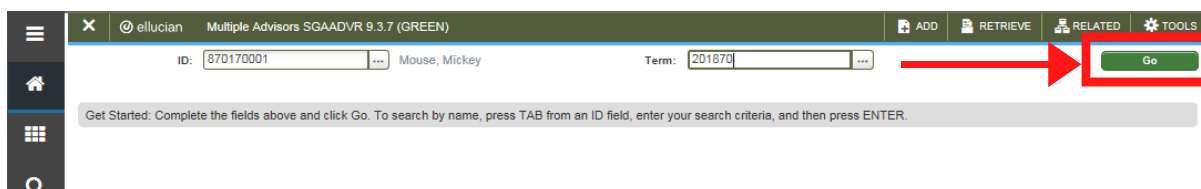
2

Viewing Advisors (only)

- STEP 2a.** Enter student ID and the desired (effective) Term. **NOTE:** You must enter a valid term to access further information. If you want to view current advisor assignments, enter the current term. If you want to enter past advisor assignments, enter a prior term. You may click the ellipses (...) to view valid terms or terms from the student's General Student Summary.



- STEP 2b.** Press **GO**, or **ALT-PAGEDOWN** to navigate to the Advisor Information section of the page.



NOTE: If you see a message similar to this, it just means that the advisor assignment has been carried forward from a prior term

STEP 2c.

If an advisor(s) exists for the effective term, the advisor's ID, Name, Advisor Type Code and Description will display. The Primary indicator may be checked if an individual has been identified as the student's primary advisor. If only one advisor exists he/she must have the Primary indicator checked. If multiple advisors exist, only one can have the Primary indicator checked.

Primary indicator must be checked if there are multiple advisors

STEP 2d.

START OVER to return to the key block, or **EXIT** when finished:

- iBanner **START OVER** button
- iBanner **Exit** button

STEP 2e.

NOTE: If there is a message, it will display on top of the **START OVER** button.

The number above the message is a "toggle" to hide/display the message: Click the number to hide the message so that you can access the **START OVER** button, or press **F5**, and return to the Key Block of the **SGAADVR** page.

3 Adding Advisors (no current advisor exists)

STEP 3a.

Enter student ID and the desired (effective) Term. **NOTE:** You must enter a valid term to continue. If you want the assignment to be for the current term, enter the current term code. Press **GO**, or **ALT-PAGEDOWN** to navigate to the Advisor Assignment section of the page.

STEP 3b.

Enter the Advisor ID or search by Advisor Name.

- If you don't know the ID of the advisor, click the ellipses (...) to search for advisor's ID numbers.

Click the ellipses (...) to search for advisors if you don't know the ID number

Press **GO** or **ALT-PAGEDOWN**

Enter filter criteria and press **GO** or **F8** to search.

Press the select button to select the advisor ID, or double-click your mouse in the ID field

Either double-click your mouse on the Advisor Name/ID Number, or use the iBanner **SELECT** button

STEP 3c.

Once the appropriate advisor is listed, indicate the *Advisor Type* code, according to the guidelines listed above. You may double-click, or press the **F9** key with your cursor in the *Advisor Type* field, to display and select the desired code from the List of Values. Lastly, click the *Primary* checkbox.

- Indicate the Advisor Type in the Code field
- Click the Primary checkbox

STEP 3d.

Save or press **F10**.

iBanner **SAVE** button

STEP 3f.

START OVER, or press **F5**, to update advisor assignment for another student. Note that the message displays on top of the **START OVER** button.

iBanner **START OVER** button is "hidden" behind the message.

STEP 3g.

Click the number to hide the message so that you can access the **START OVER** button , or press **F5**, and return to the Key Block of the **SGAADVR** page. Press **EXIT** when finished.

4

Adding Advisors if Advisor exists for current term and you wish to add additional advisors

STEP 4a.

Enter student ID and the desired (effective) Term. **NOTE:** You must enter a valid term to continue. If you want the assignment to be for the current term, enter the current term code. Press **GO**, or **ALT-PAGEDOWN** to navigate to the Advisor Assignment section of the page.

STEP 4b.

1. Use the down arrow key on your keyboard to navigate to the **NEXT RECORD**.
2. Follow steps Steps 3a–3g above for adding an advisor with no current advisor listed.
3. DO NOT click the Primary checkbox as there can be only one primary advisor. **NOTE:** For undergraduate students, the First-Year Seminar instructor/advisor should remain Primary until a student as reached sophomore standing.
4. **SAVE** and **START OVER** or **EXIT**

5

Adding Advisors if Advisor exists from a previous term and you wish to add additional Advisors

STEP 5a.

Enter student ID and the desired (effective) Term. **NOTE:** You must enter a valid term to continue. If you want the assignment to be for the current term, enter the current term code. Press **GO**, or **ALT-PAGEDOWN** to navigate to the Advisor Assignment section of the page.

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

STEP 5b.

Before entering additional advisor(s), click the **MAINTENANCE** button. You can only make modifications to the student record if the term code in the Key Block matches the term code in the Advisor Information section:

Note that term codes do not match.

Click the **MAINTENANCE** button.

STEP 5c.

Click **COPY ADVISOR**.

Option List

Copy Advisor

End Advisor

Cancel

You will now see the previous advisor displayed on your screen.

STEP 5d.

Add the new advisor described above in steps 3b - 5g:

1. Add advisor
2. Indicate advisor Type
3. Only 1 advisor can be *Primary*
4. **SAVE**

6 Removing Advisors if one or more Advisor exists and all should be removed:

STEP 6a. Enter student ID and the desired (effective) Term. **NOTE:** You must enter a valid term to continue. If you want the assignment to be for the current term, enter the current term code. Press **GO**, or **ALT-PAGEDOWN** to navigate to the Advisor Assignment section of the page.

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170001 Mouse, Mickey Term: 201870

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

STEP 6b. Click the **MAINTENANCE** button.

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170001 Mouse, Mickey Term: 201870

Maintenance

From term not equal to key block term. Press DUPREC to update.

Insert Delete Copy Filter

ID 870170007 Name Wolf, Big B. Advisor Type MAJR Advisor Type Description Major Primary Indicator * [X]

Record 1 of 1

STEP 6c. Click **END ADVISOR**.

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170001 Mouse, Mickey Term: 201870

Start Over

Advisor Information

From Term: 201830 Maintenance To Term: 999999

ID 870170007 Name Wolf, Big B. Advisor Type MAJR Advisor Type Description Major Primary Indicator * [X]

Option List

Copy Advisor

End Advisor

Cancel

Record 1 of 1

This will remove **ALL** advisors from the effective term forward.

STEP 6d. **SAVE** or **F10**. **START OVER** to return to key block, or **EXIT** when finished. **NOTE:** If the student is still active, you may want to **START OVER** to add advisors for the appropriate term – see Steps 3a-3g above.

7 Changing Advisors if multiple Advisors exist but not all should be modified:

STEP 7a. Enter student ID and the desired (effective) Term. **NOTE:** You must enter a valid term to continue. If you want the advisor(s) to be modified for the current term, enter the current term code. Press **GO**, or **ALT-PAGEDOWN** to navigate to the Advisor Assignment section of the page.

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170001 Mouse, Mickey Term: 201870

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

STEP 7b. You can only make modifications to the student record if the term code in the Key Block matches the term code in the Advisor Information section:

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170002 Mouse, Minnie Term: 201870

From term not equal to key block term. Press DUPREC to update.

ADVISOR INFORMATION

From Term: 201370 To Term: 999999

ID	Name	Primary Indicator *
871529999	Weaver, Timothy	<input checked="" type="checkbox"/>

Record 1 of 1

Before entering additional advisor(s), click the **MAINTENANCE** button.

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170001 Mouse, Mickey Term: 201870

From term not equal to key block term. Press DUPREC to update.

ADVISOR INFORMATION

From Term: 201870 To Term: 999999

Maintenance

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
870170007	Wolf, Big B.	MAJR	Major	<input checked="" type="checkbox"/>

Record 1 of 1

STEP 7c. Click **COPY ADVISOR**.

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170001 Mouse, Mickey Term: 201870

Start Over

ADVISOR INFORMATION

From Term: 201830 To Term: 999999

Maintenance

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
870170007	Wolf, Big B.	MAJR	Major	<input checked="" type="checkbox"/>

Option List

Copy Advisor

End Advisor

Cancel

Record 1 of 1

STEP 7d. You will see all of the advisors associated with the effective Term in the key section

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170001 Mouse, Mickey Term: 201930

Start Over

ADVISOR INFORMATION

From Term: 201930 To Term: 999999

Maintenance

ID	Name	Primary Indicator *
870170007	Wolf, Big B.	<input checked="" type="checkbox"/>
870170003	Train, Chew C.	<input type="checkbox"/>

Record 1 of 2

STEP 7e. Select the advisor you want to remove.
DELETE RECORD.

Multiple Advisors SGAADVR 9.3.7 (GREEN)

ID: 870170001 Mouse, Mickey Term: 201930

Start Over

ADVISOR INFORMATION

From Term: 201930 To Term: 999999

Maintenance

ID	Name	Primary Indicator *
870170007	Wolf, Big B.	<input checked="" type="checkbox"/>
870170003	Train, Chew C.	<input type="checkbox"/>

Record 1 of 2

DELETE RECORD

SAVE

- Select the record to remove
- iBanner **DELETE RECORD** button
- iBanner **SAVE** button

STEP 7f. Remember that one of your Advisors needs to be flagged as *Primary*. **SAVE** or **F10. EXIT** when finished.