

Adding and Changing Advisors

<u>Contents</u>	Page
Prior to any action with Advisors.....	1
Adding Advisor to New Student	1
Updating Advisors.....	4
Include History and Return to Search	5
Viewing Advisors in UDSIS.....	5
Registrar's Office Standard COGNOS Reports.....	6
Advisor Access in UDSIS.....	6

Prior to any action with Advisors (IMPORTANT NOTE)

Navigation: Main Menu > Campus Community > Student Services Center

1. Before you add an advisor to an existing student, go to the Student Services Center – **academics tab**, and confirm their **current Program and Plan**. Make sure you are viewing the active career and program/plan.
2. If their current plan is correct, proceed to the Adding Advisors step.
3. If it a recent program/plan change has not yet been recorded in UDSIS, you must wait until the change occurs. The Change of Major form copies all affected parties when the change is complete. Any questions, contact the Registrar's Office.

Adding an Advisor to a New Student

Navigation: Records and Enrollment > Student Background Information > Student Advisor

1. Navigate to the Search Page and enter student's **UD ID** or name and click the **Search** button.

- The Academic Advisor is stored within UDSIS with an **Effective Date**. This allows UDSIS to store historical information about advisors. The student's assigned advisors as of an effective date appear in one or more rows below the date row..

Effective Date – Accept the current date.

NOTE: **Only ONE save of changes can be made per day.**

If you add an advisor, save the record, and later determine it is the wrong person, you will need to wait until the next day to update the student's record.

If you are adding an advisor to a student who already has information on this page, see page 6: changing an advisor or adding an additional advisor. Contact the Registrar's Office if you have any other questions before proceeding.

- Advisor Role** – accept default of Advisor (Other choices apply to graduate program options.)
If the student already has an advisor, follow the Updating directions below.

- Academic Career, Program and Plan** – use Lookup icons to fill-in these values for your college and major (plan). Note: The system will only give you the values for which the student is currently active. If your department is NOT a choice, do not proceed. Contact the Registrar's Office or wait a few days till the change of major occurs.
- Academic Advisor** – enter Empl ID (UD ID) or use lookup to select the advisor
For best results, enter information in more than one of these boxes:
Academic Organization (department),
Last Name
First Name.
If the advisor doesn't appear in search, contact the Registrar's office.

The screenshot shows the 'Advisor Search Page' with the heading 'Look Up Academic Advisor'. It contains several search criteria, each with a 'begins with' dropdown menu and a text input field: Academic Institution (with 'UOD01' entered), EmplID, Academic Organization, National ID, Campus ID, Last Name, and First Name. At the bottom are three buttons: 'Lookup', 'Clear', and 'Cancel'.

After entering and advisor, the screen looks like:

The screenshot shows the 'Student Advisor' screen. At the top, it displays 'Student Name' and 'Student ID'. Below this is a search bar with 'Find | View All' and 'First 1 of 1 Last'. The main area contains several fields: '*Academic Institution' (UOD01, University of Delaware), '*Effective Date' (02/23/2011), '*Advisor Role' (Advisor), '*Advisor Number' (1), '*Academic Career' (UGRD, Undergraduate), '*Academic Program' (AS-A, Arts and Sciences - Associates), '*Academic Plan' (UST-AA, University Studies AA), and 'Academic Advisor' (99999, Advisor Name). At the bottom, there are four checkboxes: 'Advised by Committee', 'Must Approve Enrollment', 'Must Approve Graduation', and 'Graduation Approved'. A red oval highlights these checkboxes. At the very bottom, there are several buttons: 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'. A red oval highlights the 'Save' button.

- Click any checkboxes in the Advisor screen that apply (these are not commonly used).
- Click the **Save** Button.

Updating Advisors

Prior to updating any advisors read the Important Note on Page 1.

1. Navigate to the Search Page:

Records and Enrollment > Student Background Information > Student Advisor

and enter student's UD ID or name and click the Search button.

2. Click the top to create a new record with a new Effective Date. Changes can only be made in the new effective date. All data prior to that date is stored as history.
 - a. Click on **View All** to see all the current advisors for the student.
 - b. UDSIS copies up any previous advisors who are associated with student careers and programs **which are currently active**. If a student program listed here is inactive, UDSIS does not copy up the program or plan info; instead leaving it as Career=UGRD with a blank program and plan. If the program is active but the plan is NOT active, UDSIS will copy it up and list it as "plan not active".
 - c. If you are **replacing an advisor** for a Program/Plan (major) that is already listed, overwrite the emplid of the current advisor with the new advisor. Hit enter and the new advisor's name will automatically fill in next to the emplid.
 - d. If you are **deleting an advisor** (the student has dropped the major) click on the button on the appropriate lower Advisor row you need to delete.

Remember: When you are notified through a Change of Major form that a student has dropped the program or plan you manage, you need to update their info, deleting the associated advisor row. A student with a double major or several minors may have several advisors. Only delete the one that no longer applies for this new date.

- If you are **adding a new advisor** for your Program/Plan, click on the lower button (see pic above) to add a new Advisor record (row) for this effective date. Change the Academic Career, Program and Plan to the career/program/plan for the student. Add the advisor for this plan (major) by entering the Empl ID, or using the lookup to select the advisor.
- If there are any blank rows after you complete your updates, delete them using button.
- Click the **Save** button. No other changes can be made to this student's record for this effective date.

Include History and Return to Search buttons

- Include History button** – UDSIS will only show you the current record, if you want to see *historical* rows you must click this button
 - Click **View All** to see both rows at the same time
- Return to Search button** – **click this button to find another student's record**

Viewing Advisors in UDSIS

- Students view their advisors in their Student Center, in the Advisor blue box in the right column. This box lists any advisor assigned to their **current active career/program**. If they have no advisors assigned at all, or none assigned for their current **active** career/program, the box will display as this:
- Administrative Users will view a student's advisor in *Campus Community > Student Services Center*, in the Advisor blue box in the right column.

Registrar's Office Standard COGNOS Reports

1. Go to http://www.udel.edu/registrar/faculty_staff/reports/ to run COGNOS Advisement-related reports.
 - a. You must have access to Cognos. See Setup and Browser notes for important info.
2. Key Reports:
 - a. Report "A5" lists students active in the term in the prompted plan with ALL their advisors. Report "A5-Plan" lists all students in a prompted plan with the Advisor for that plan only. If no advisor is assigned, the column is blank.
 - b. Report "A10", the Advisee Plan Audit, checks that the student is still active in the Academic plan listed at *Records and Enrollment > Student Background Information > Student Advisor*. Due to the frequency of student plan changes, we recommend staff **run this report weekly**.

The report is typically run using the College code prompt. Staff can subsequently filter the output report in Excel, choosing the academic plan codes they manage.

For the plans highlighted in yellow on the report, staff can update the UDSIS advisor information, either updating the student's academic plan if the advisor is still valid, or totally removing the advisor row if the student is no longer in the department. The student's current programs/plans are listed on the report to help determine the update required.
 - c. Reports "A8" and "A9" are used in conjunction with the UD Student Advisor Batch Load process (*additional training required*). The reports, however, can be run independent of the process to check advisor assignments.

"A8" lists all students with NO advisor for the prompted plan – a quick way to check if any students need advisor assignment.
"A9" lists all advisees of a prompted advisor.
 - d. Other advisement reports provide information on incomplete grades and academic standing. If you have any questions, please contact registrar-datarequest@udel.edu .

Advisor Access in UDSIS

1. When an advisor is assigned his/her first advisee in UDSIS, overnight his/her access is automatically updated to grant access in UDSIS to *Self Service > Advisor Center*.
2. When the last advisor is removed from an advisor in UDSIS, overnight his/her access to *Self Service > Advisor Center* is automatically removed.
3. If the advisor performs advising duties but does not have assigned advisees, complete the UDSIS Access request webform at www.udel.edu/udsisaccess to request "Drop-In Advisor" access. This will provide *Self Service > Advisor Center*.

This access will remain until a webform request for removal of this access is received/processed.