University of Delaware
Office of the University Registrar

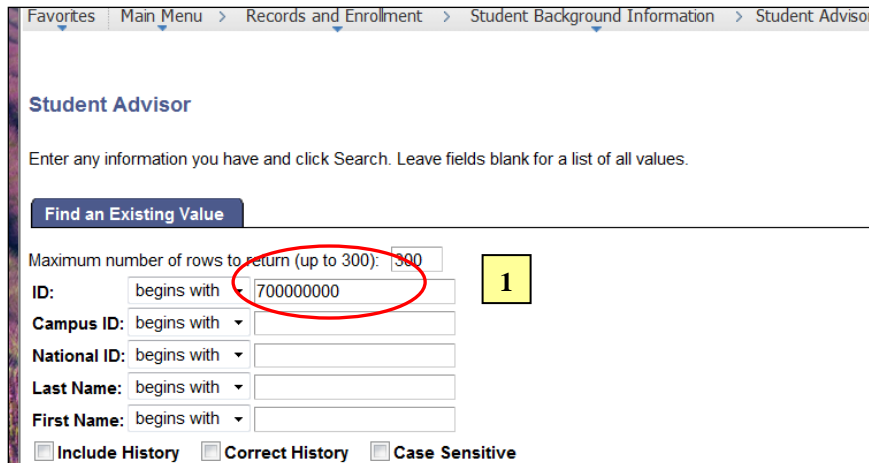# Adding and Changing Advisors

Prior to any action with Advisors

Navigation: *Campus Community > Student Services Center*

1. Before you add an advisor for an existing student, they must have an active career and program, and the associated plan must be listed on the **Student Services Center** – **academics tab.**

   If a recent program/plan change does not appear in UDSIS, you must wait until the change occurs. 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.

2. 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. 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 the section **Updating Advisors**.

3. **Advisor Role** – The default role=Advisor (ADVR) means *"Academic Advisor"*. Other departments also add advisors with different roles. Do not modify/delete any Advisor rows using other advisor roles.
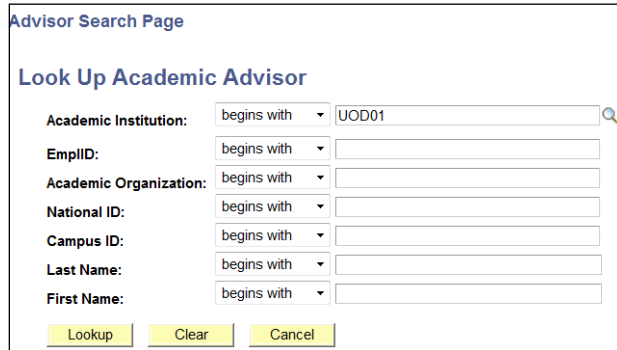
4. **Academic Career, Program and Plan** – use Lookup icons to fill-in these values for your college and major (plan). The system only gives values for which the student is currently active. If your plan t is NOT a choice, you cannot proceed. Wait until the change of major

occurs.

5. **Academic Advisor** – enter Empl ID (UD ID) or use lookup to select the advisor
   For best results, enter information in: Last Name, First Name.

   If the advisor doesn't appear in search, contact the Registrar's office.

After entering an advisor, the screen looks like:

6. The checkboxes in the Advisor screen are not commonly used.

7. Click the **Save** Button.

Updating Advisors

1. Go to: ***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-dated row. All data prior to that date is stored as history.

    a. Make sure **Academic Institution=UOD01**. If it lists UOD02, change it to UOD01 and hit Enter.

    b. Click on **View All** to see all the current advisor rows for the student.

    c. UDSIS will copy up any previous advisors associated with student career/programs which are currently active. If an advisor is associated with an *inactive* student program, UDSIS copies up a row with the Career and a blank program and plan. If the program is active but the plan is NOT active, UDSIS copies up the plan and lists it as "**Plan not Active**".

3. If you are replacing an advisor for a Program/Plan (major) that is already listed, overtype the emplid of the current advisor with the new advisor's emplid or using the lookup to select the advisor. Hit enter and the new advisor's name will automatically fill in next to the emplid.

    If you are deleting an advisor (the student has dropped the major) click on the lower [−] button *(see pic above)* on the appropriate Advisor row you need to delete.

    - A student may have several advisors; only delete the one no longer active for this new date.

    - You cannot delete the advisor row if it is the only one listed after you click the top blue [+] to add today's effective date. The new department should promptly add the advisor for the student's new plan.

        If this does not happen in a timely manner, the previous department can remove an inactive plan/advisor, by adding a new effective date. Then click the magnifier next to **Academic Plan,** click the **Lookup** button to change the previous plan to the student's new **active BS/BA plan** and specify the **Unassigned Advisor ID=777777777**.

If you are <mark>adding a new advisor</mark> for the student's 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 associated career/program/plan using the lookup icons. List the advisor for this plan (major) by entering the Empl ID, or using the lookup to select the advisor.

4. <mark>If there are any blank rows after you complete your updates, delete them using [–] button</mark>.

5. Click the **Save** button. No other changes can be made to this student's record for this effective date.

Common Errors

1) If you get this error, you haven't clicked the top-blue plus sign to add a new effective-dated row. See **Updating Advisors- Step 2**.

Message

Cannot change current or history records unless in Correction mode. (15,1)

You have attempted to change a record that is effective dated, and the record contains an effective date that makes it either the current record or a historical record. Either use the Add (+) button to create a new record with a future effective date, or change your mode to Correction.

2) If you get the error below, there is a <mark>blank Advisor row</mark> associated with the student.
Click the "**View All**" link on the **second blue bar** to list all the Advisor rows. As shown above, click the "minus" button to delete any blank row. Then you will be able to **Save** the record.

Message

An Academic Advisor or an Advising Committee must be specified. (14600,194)

Either an Academic Advisor or an Advising Committee must be selected for each Advising Role before a record can be saved. Select a valid Academic Advisor or Advising Committee then save the record.

[OK]

Include History

1. **Include History** button – By default, UDSIS only shows you the last effective-dated record.
To view previous advisor assignments, click the **Include History** button. The topmost blue bar will list the number of historical rows *(see below: rows list as 1 of 2)*

2. To see *historical* rows, click **View All** to see all effective-dated rows, or use [▶]. to page through.

Viewing Advisors in UDSIS

Students view their advisors in their **UD Student Homepage,** in the **Degrees & Advisement** tile at the **Advisors** menu item. This link 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, it will display "**You have not been assigned to an Advisor or to any Advising Committees**.":
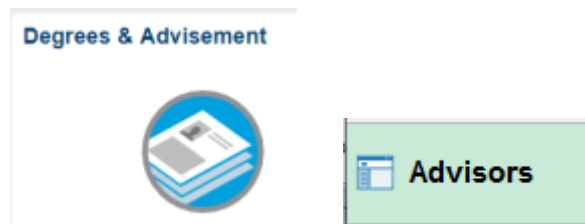
Administrative Users will view a student's advisor(s) at: *Campus Community > Student Services Center*, in the **Advisor blue box** in the right column.

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 the **Faculty & Advisors Homepage** > *Advisor Center* tile.

2. When the last advisor is removed from an advisor in UDSIS, overnight his/her access to the **Faculty & Advisors Homepage** > *Advisor Center* tile.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 the **Faculty & Advisors Homepage** > *Advisor Center* tile*.*

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

UD | UDSIS

Advisor Assignment

Maintenance WorkCenter

The Advisor Assignment Maintenace WorkCenter is a tool to easily discover which students need advisor assignment updates for the academic plans you manage. Updates are made inside the WorkCenter, one-by-one, using the lists provided. Staff should check their WorkCenter at least **weekly** to update advisor assignments..

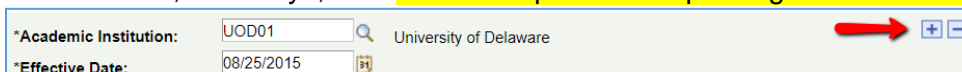Navigation: ***UDEL WorkCenters > Advisor Assignment Maintenance***

The WorkCenter uses information you provided to the Registrar's Office during Advisor Assignment training – ie. the Major/Minor plan codes you assign - to create the list of students that need plan/advisor updates. If no plans or an incomplete list of plans appear on the tab: **Plans you Assign**, contact the Registrar's Office. A description of the tabs follow:
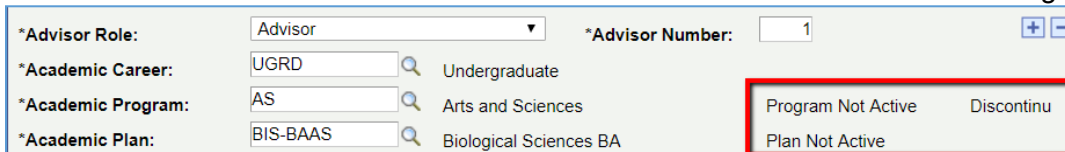
Plan Inactive

These students no longer have the plan code listed on their Student Advisor record.They have either totally switched out of your major/minor OR they have switched into another plan in your department. This tab appears first, for often, correcting the assignment here for current students will automatically correct/remove them from the "Advisor Missing" list

TO Correct the Advisor Information:

a)   Click on a Student Name in the list. The Student Advisor screen for that student will appear on the right-hand side of the page. If no names appear, you have no corrections to make.

b)   FIRST STEP, as always, is to click the topmost blue plus sign to set a new effective date.
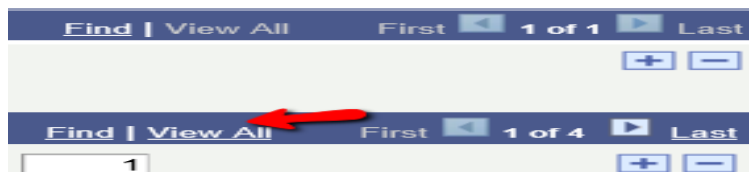
| *Academic Institution: | UOD01 | University of Delaware | + − |
| *Effective Date: | 08/25/2015 | | |

This will cause UDSIS to check the current status of the student's Academic Program and Plan:

*Advisor Role:	Advisor	*Advisor Number:	1	+ −
*Academic Career:	UGRD	Undergraduate		
*Academic Program:	AS	Arts and Sciences	Program Not Active	Discontinu
*Academic Plan:	BIS-BAAS	Biological Sciences BA	Plan Not Active	

You SHOULD, at a minimum see "Plan not active" for the plan you manage, matching the list item on the left..

c)   Click the "View All" link on the Advisors blue bar to view ALL advisors for the student.

**Find	View All**	First ◄ 1 of 1 ► Last
	+ −
**Find	View All**	First ◄ 1 of 4 ► Last
1	+ −

d)   For "Plan Not Active", click the 🔍 magnifier and then [Look Up] to see active plans.
If the student has switched to a related major/minor and will retain the same advisor, you can click the

new plan code and then . If the new plan code requires a different advisor, enter the new plan code and Advisor ID and hit SAVE.

You can delete your plan's advisor if the student has switched out of your department if there are multiple advisors for the most recent effective date. Remember to delete any blank rows before saving the record.

If you do not manage advisors for the new plan the student has entered, OR if you see "Program Not Active" after clicking the top-blue plus sign, the NEW department should assign an advisor for the new major, and then you can delete the previous advisor.. If this does not happen in a timely manner, see **Updating Advisors-step 3** above.

TO **Refresh the list of students** after saving changes :

Click the blue arrow circle to the right of the tab title.

Inactive Plans with Advisor
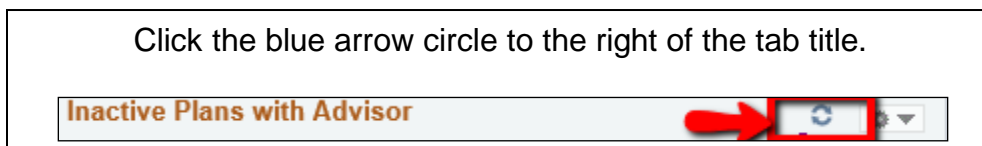
# Advisor Missing – *All Colleges except Arts & Sciences-UGRD Majors*

This tab applies to all colleges except Arts & Sciences-UGRD students-Majors only. If you assign advisors for a MINOR in all colleges (UGRD and GRAD) or any Major except for AS-UGRD students, then this tab is for you!

These students **do not have a valid advisor for a plan code you manage.** If no names appear, you have no advisors to add! If MANY appear, you probably will want to add these in batch mode.

TO Add an Advisor:

a) Click on a Student Name in the list. The Student Advisor screen for that student will appear on the right-hand side of the page.

b) If today's date appears on the right-hand screen (the first advisor assignment for the student), continue to c); otherwise click the topmost blue plus sign to set a new effective date.

If many students need advisors, you may want to add these in batch mode if you have the security.

c) Use the magnifier glass or enter the Career, Academic Program, Plan and Advisor ID and hit SAVE.

d) If a student's advisor record has this advisor, change the Advisor ID to a valid one for your plan.

777777777   Unassigned,Advisor
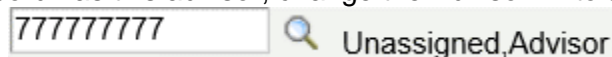
AS Maj-Advr Missing

This tab is ONLY used by Arts & Sciences Advisor Assigners for UGRD Majors only. It includes the filters specified in the CAS advising model. If students appear here, then they may have an "Academic Advisor" (ADVR) for the AS UGRD major listed. Note that all Minors lacking advisors, regardless of college, appear on the "Advisor Missing" tab.

Batch Asgmt

This tab provides quick links to the Advisor-related COGNOS reports, A8-A11, that are used to create the batch assignment files. A link is also provided for the UDSIS page to run the UD Student Advisor Load process if you have security to run the batch load.

Plans You Assign

This tab lists the academic plan codes you manage. This "setup" information determines the students presented to you on the preceding tabs. If changes are needed to this setup or you have questions about the Advisor Assignment WorkCenter, please click the Registrar's Office. link at the bottom right of the WorkCenter home page.

To Return to UDSIS full navigation after accessing your WorkCenter:

Click the HOME icon in the top right corner of your screen:

Advisor-Related COGNOS reports

Go to http://www.udel.edu/registrar/faculty_staff/reports/ to run COGNOS Advisement-related reports. You must have access to Cognos. Key Reports are:

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.

Reports "A8", "A9" and "A11" 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 – similar to the **Advisor Missing tab** in the Advisor Assignment WorkCenter
"A9" lists all advisees of a prompted advisor.

"A11" lists the current advisors of a prompted plan.

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.

similar to the **Plan Inactve tab** in the Advisor Assignment WorkCenter. 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.