

## Advisor Batch Assignment

This document describes how to add/remove/update advisor assignments through batch processing.

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### Add Advisors in Batch

#### 1) Create the input file – must be .csv (comma-delimited) format

- a) The file can be created manually and must contain these 6 fields:

*Student-ID--Advisor-ID--AdvisorRole---StuCareer---StuProgramCode--StuPlanCode*

OR

- b) Make a “starter file” by running the Cognos rpt – **A8.UD Student Advisor-Add**

at [http://www.udel.edu/registrar/faculty\\_staff/reports/](http://www.udel.edu/registrar/faculty_staff/reports/).

Open the file in Excel and make these edits:

**Do NOT use the Excel Filter function. Use Sort and Delete to remove rows.**

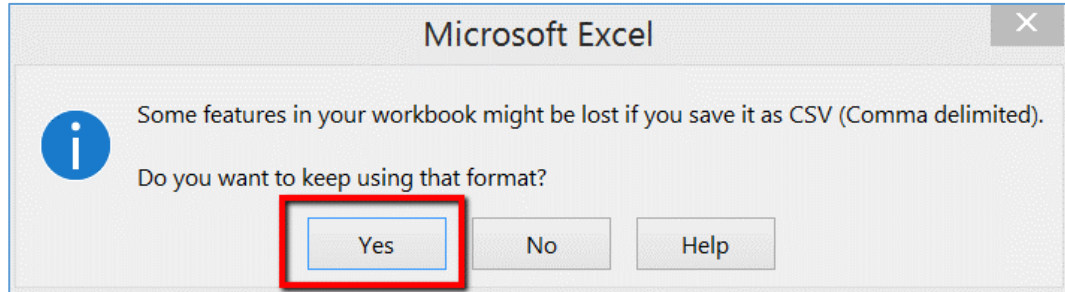
- 1) In column **Advisor ID**, enter the Emplid of the UD Advisor for this student – Program -Plan. Make sure you have the correct Emplid! UDSIS allows any emplid marked as an Advisor.
  - 2) Advisor Role: Enter value: *ADVR (General Advisor)* OR *RSCH (Research Advisor)*
  - 3) Delete all **columns** with DELETE in the header. These are informational columns to help identify students.
  - 4) Delete Header row 1.
- c) File should now look like this, with NO header row, and col A=Student ID and col B=Advisor ID.

	A	B	C	D	E	F
1	701572838	45728	ADVR	UGRD	EG	CHE-BCHE
2	701333749	45728	ADVR	UGRD	EG	CHE-BCHE

- d) Save the file into your Student-Advisor-Load folder. Do NOT have any spaces, periods, etc. in the filename. **Format: YourEmailName-ADD-ADV-plan-date Ex: rsmith-ADD-ADV-FREN-081518**

WIN users: Select “Save as type: **CSV (Comma delimited)**  
MAC users: Select “**Windows Comma Separated (.csv)**”

- e) Excel will ask you to confirm this format. Click **Yes**.



## 2) Run the UDSIS process:

- a) Login to UDSIS and go to

***UDEI Customizations > UD SR Customizations > UD Student Advisor Load***

- b) Click **Search** on the tab **"Find an Existing Value"** and select your Run Control ID: **ADD\_ADVISOR**

**FIRST TIME ONLY:** - Create **Run Control ID:**

1. Click the **Add a New Value** tab
2. Enter Run Control ID: **ADD\_ADVISOR**
3. Click **Add**.

*You can reuse this run control each time you need to add Advisors.*

- c) On the **UD Student Advisor Load** main menu, select button **"Add Advisor"** on the left, and additional icons appear. Click the **paperclip** icon.

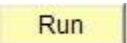


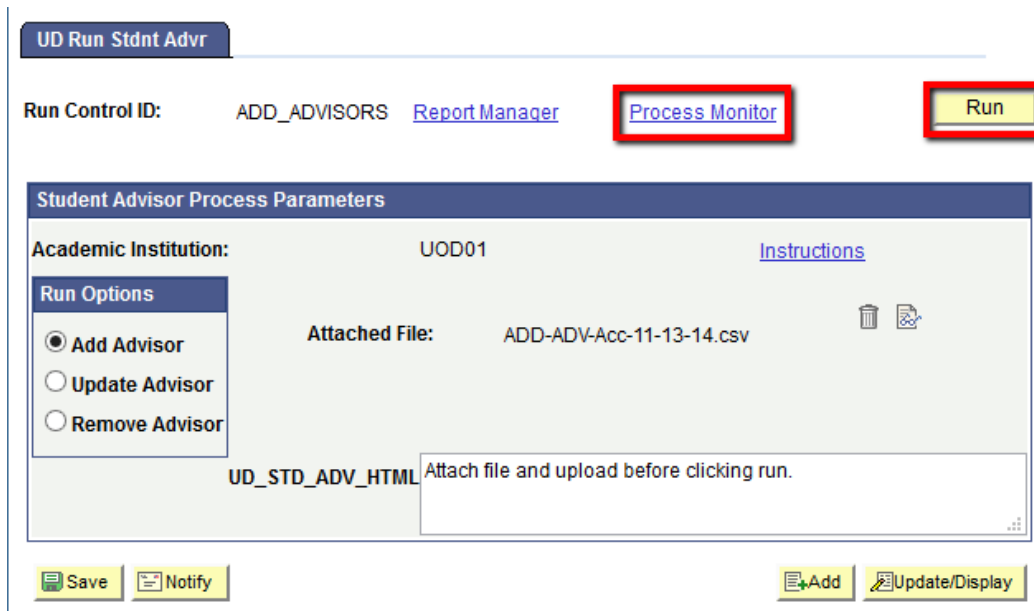
- d) Click **Browse** and select your previously created **.csv (comma-delimited) file** of Advisor Assignments. When you click **Open**, the filename will appear in the File Attachment window:
- e) Click button **Upload** to upload file.  
Other icons: TRASH CAN – delete the file      VIEW ATTACHMENT– paper with eyeglasses  
Instructions link – this documentation
- f) Click **SAVE** to save the run control.

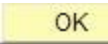
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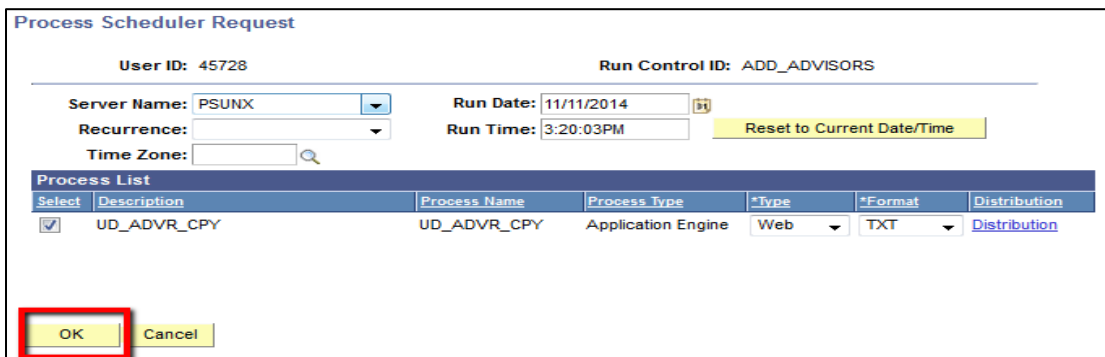
Note: The effective date for the new advisor will be the day the batch process is completed. If there is an existing effective date for the current date, the effective date will be moved to the next day.

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- g) Click . Note the Process Monitor link for later step.



- h) Select Server Name: **PSUNX** and Click 

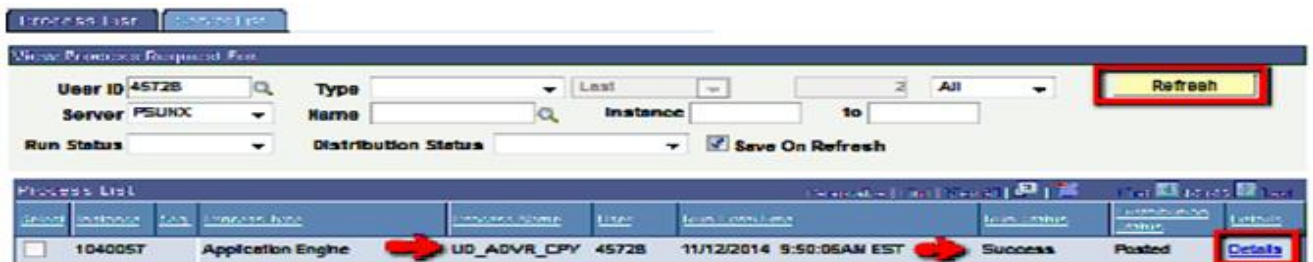


Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	UD_ADVR_CPY	UD_ADVR_CPY	Application Engine	Web	TXT	Distribution

This returns you to previous screen. A process instance number appears below the Run button.

- i) Click link **Process Monitor**.
- j) Click the **Refresh** button periodically to update the process status. The process is finished when the Run Status is **Success** and the Distribution Status is **Posted**. (**Queued** and **Processing** indicate the process is still running.)

When you see Distribution Status is **Posted**, click the link **Details**.



ID	Process Type	Process Name	User	Last Modified	Run Status	Distribution Status	Details
104005T	Application Engine	UD_ADVR_CPY	45728	11/12/2014 9:50:06AM EST	Success	Posted	Details

k) Click **View Log/Trace**

Process Detail

Process	
Instance	1040057
Name	UD_ADVR_CPY
Run Status	Success
Type	Application Engine
Description	UD_ADVR_CPY
Distribution Status	Posted

Run	Update Process
Run Control ID	ADD_ADVISORS
Location	Server
Server	PSUNX
Recurrence	
	<input type="radio"/> Hold Request
	<input type="radio"/> Queue Request
	<input type="radio"/> Cancel Request
	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On	11/12/2014 9:50:33AM EST
Run Anytime After	11/12/2014 9:50:06AM EST
Began Process At	11/12/2014 9:50:40AM EST
Ended Process At	11/12/2014 9:50:55AM EST
	<a href="#">Parameters</a> Transfer
	<a href="#">Message Log</a> View Locks
	<a href="#">Batch Timings</a>
	<a href="#">View Log/Trace</a>

OK Cancel

### 3) Check the Results:

- To view any errors, click a report ending in ERR.txt.
- UD\_STDNT\_ADVSR\_Log.txt. is an extensive log. You can look for the string:  
Processed Student Advisor for Emplid:  
The end of the file lists: Total number of Records processed:

View Log/Trace

Report

Report ID: 737604 Process Instance: 1040057 [Message Log](#)

Name: UD\_ADVR\_CPY Process Type: Application Engine

Run Status: Success

UD\_ADVR\_CPY

Distribution Details

Distribution Node: sa Expiration Date: 02/10/2015

Name	File Size (bytes)	Datetime Created
<a href="#">AE_UD_ADVR_CPY_1040057_stdout</a>	1,409	11/12/2014 9:50:55.896386AM EST
<a href="#">JD_STDNT_ADVSR_CiErr.txt</a>	303	11/12/2014 9:50:55.896386AM EST
<a href="#">JD_STDNT_ADVSR_Err.txt</a>	185	11/12/2014 9:50:55.896386AM EST
<a href="#">JD_STDNT_ADVSR_Inputfile_Err.txt</a>	148	11/12/2014 9:50:55.896386AM EST
<a href="#">JD_STDNT_ADVSR_Log.txt</a>	4,536	11/12/2014 9:50:55.896386AM EST

Distribute To

Distribution ID Type	*Distribution ID
User	45728

Return

## Remove Advisors in Batch

### 1) Create the input file – must be .csv (comma-delimited) format

- a) The file can be created manually and must contain the first 5 fields, and optionally a 6th:

*Student-ID--Advisor-ID--AdvisorRole---StuCareer---StuProgramCode---Optional: StuPlanCode*

OR

- b) Make a “starter file” by running the Cognos rpt – **A9. UD Student Advisor-Remove** at [http://www.udel.edu/registrar/faculty\\_staff/reports/](http://www.udel.edu/registrar/faculty_staff/reports/).

Open the file in Excel and make these edits:

**Do NOT use the Excel Filter function. Use Sort and Delete to remove rows.**

- 1) Delete all **columns** with DELETE in the header. These are informational to help identify students.
  - 2) Delete Header row 1.
- c) File should now look like this, with NO header row, and col A=Student ID and col B=Advisor ID.

700000000	12345	ADVR	UGRD	AS
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**NEW 6-1-18:** If you optionally specify the Stu Plan Code as the 6<sup>th</sup> field, only the row for this Student-Advisor-Plan Code will be removed. If NO plan code is specified, all plan codes for this specific Student-Advisor combination will be removed.

- d) Save the file, selecting “**Save as type: CSV (Comma delimited)**” into your Student-Advisor-Load folder with format: **YourEmailName-REM-ADV-plan-date**

**Example: rsmith-REM-ADV-FREN-081518**

### 2) Run the UDSIS process:

- a) Login to UDSIS and go to

**UDEL Customizations > UD SR Customizations > UD Student Advisor Load**

- b) Click  on the tab “**Find an Existing Value**” and select your Run Control ID: **REMOVE\_ADVISOR**

**FIRST TIME ONLY:** - Create Run Control ID:

1. Click the **Add a New Value** tab
2. Enter Run Control ID: **REMOVE\_ADVISOR**
3. Click **Add**.

*You can reuse this run control each time you need to remove Advisors.*

- c) When the **UD Student Advisor Load** main menu appears, specify Run Option on left **Remove Advisor**
- d) Click the paperclip icon and browse to select your input file – a .csv (comma-delimited) file
- e) Continue as above to run the process – Step 2 under ADD

### 3) Check the Results – See Step 3 under ADD

# Update Advisor

## 1) Run the UDSIS process:

a) Login to UDSIS and go to

**UDEL Customizations > UD SR Customizations > UD Student Advisor Load**

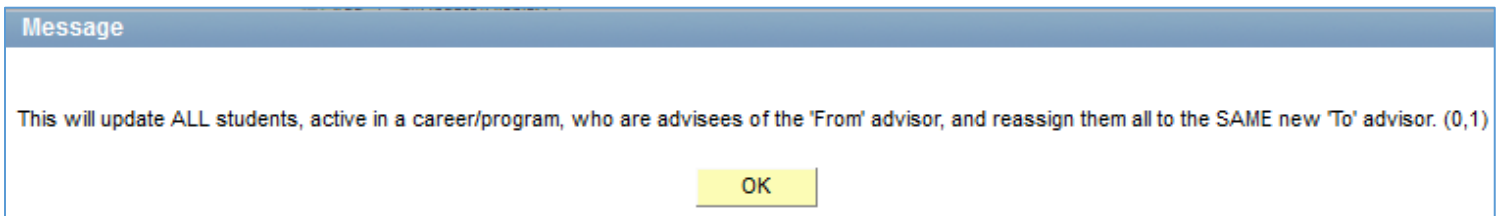
b) Click  on the tab **“Find an Existing Value”** and select your Run Control ID: **UPDATE\_ADVISOR**

**FIRST TIME ONLY:** - Create Run Control ID:

1. Click the **Add a New Value** tab
2. Enter Run Control ID: **UPDATE\_ADVISOR**
3. Click **Add**.

*You can reuse this run control each time you need to reassign ALL students from one advisor to another.*

c) The Run Option: **Update Advisor** does **NOT** take file input; ie. It does NOT process against specific students. When you select that Run Option, you see the warning message:



This option should only be used when the Advisor has left UD or is no longer advising. All students, active in their career and program (college) who are assigned to the “From” Advisor, will now be assigned to the SAME “To” Advisor.

d) Enter Advisor Emplids. Use the magnifying glass to verify that you have the correct ones.

UD Run Stdnt Advr

Run Control ID: UPDATE\_ADVISORS [Report Manager](#) [Process Monitor](#)

Student Advisor Process Parameters

Academic Institution: UOD01

Run Options

Add Advisor

Update Advisor

Remove Advisor

From ID: 27459  To ID: 45728

Save Return to Search Previous in List Next in List Notify Add Update/Display

## Swap Advisor in Batch

**NEW 6-5-18:** If you want to assign a portion of the students assigned to the current advisor to a **different advisor**, use the new SWAP feature. It will swap a new Advisor ID for the current one while retaining the same Student, Career, Program and Plan. Academic departments who assign a staff advisor for the first years of a student's matriculation, and then switch to a faculty advisor will find this feature very useful and easy to use.

### 1) Create the input file – must be .csv (comma-delimited) format

The file can be created manually and must contain these 7 fields:

*Student-ID--Advisor-ID--AdvisorRole---StuCareer---StuProgramCode--StuPlanCode--SwapToAdvisorID*

OR

Run the Cognos report **A11. UD Student Advisor-Swap**, choosing the student's term, career and major/minor.

- a) Edit the file, sorting by fields (Advisor, Campus, Academic Level, etc) to create the targeted list of students that need an advisor change. Enter the "Swap To" advisor in the 7<sup>th</sup> column.]

**Do NOT use the Excel Filter function. Use Sort and Delete to remove rows.**

- b) Delete all **columns** with DELETE in the header. These are informational columns to help identify students.
- c) Delete Header row 1.
- d) Save the file into your Student-Advisor-Load folder. Do NOT have any spaces, periods, etc. in the filename. **Format: YourEmailName-SWAP-ADV-plan-date Ex: rsmith-SWAP-ADV-FREN-081518**  
WIN users: Select "**Save as type: CSV (Comma delimited)**"  
MAC users: Select "**Windows Comma Separated (.csv)**"

### 2) Run the UDSIS process:

- f) Login to UDSIS and go to

**UDEL Customizations > UD SR Customizations > UD Student Advisor Load**

- g) Click  on the tab "**Find an Existing Value**" and select your Run Control ID: **SWAP\_ADVISOR**

**FIRST TIME ONLY:** - Create **Run Control ID:**

1. Click the **Add a New Value** tab
2. Enter Run Control ID: **SWAP\_ADVISOR**
3. Click **Add**.

*You can reuse this run control each time*

- h) When the **UD Student Advisor Load** main menu appears, specify Run Option on left **Swap Advisor**
- i) Click the paperclip icon and browse to select your input file – a .csv (comma-delimited) file
- j) Continue as above to run the process – Step 2 under ADD

### 3) Check the Results – See Step 3 under ADD



## Advisor History Table FACTs

1. Advisors in UDSIS are processed manually at:  
*Main Menu > Records and Enrollment > Student Background Information > Student Advisor*
2. When you need to add or change an advisor, **Step 1** is to add a new effective-dated row.

**Step 2- Review:** 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”.

**Add/Update/Delete:** as needed, specifying the student’s current career/program/plan and the assigned Advisor ID. Multiple advisor rows can be added for each effective-date. If changing the advisor for info that was “copied-up” row, you can update the Advisor Emplid in that row.

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.

The screenshot shows the 'Student Advisor' form. At the top, there's a search bar with '7xxxxxxx'. Below that, the form is divided into sections. The first section has fields for '\*Academic Institution:' (UOD01) and '\*Effective Date:' (02/03/2015). The second section has fields for '\*Advisor Role:' (Advisor), '\*Academic Career:' (UGRD), '\*Academic Program:' (MS), and '\*Academic Plan:' (ENSC-MS-BS). There are also checkboxes for 'Advised by Committee', 'Must Approve Enrollment', 'Must Approve Graduation', and 'Graduation Approved'. The third section has fields for '\*Advisor Role:' (Advisor), '\*Academic Career:' (UGRD), '\*Academic Program:' (MS), and '\*Academic Plan:' (FR-MIN). There are two rows of advisor information, with Advisor Numbers 1 and 2. Red boxes highlight the '+ Add Row' button and the 'Advisor Emplid' field.

3. If the student is currently active in a Career and program and has advisors assigned, they will appear in the Advisor Box for the student at *Campus Community > Student Services Center*. If the student is not active, the box displays:

The screenshot shows a box titled 'Advisor'. Inside the box, it says 'Program Advisor' and 'None Assigned'.

4. You cannot remove the last, ONLY advisor for a student.
5. **Students switching programs:** If a student switches programs (colleges), any previous advisor assignments for plans (Majors or Minors) will NOT be copied up, since they are now associated with an inactive program. Registrar’s Office staff will add back Advisors associated with MINORs, if the student is retaining the Minor when changing programs.
6. **UD Student Advisor Load-ADD** will always add the new advisor as the next higher Advisor#. This process allows you, just like UDSIS, to add any advisor in the UDSIS Instructor/Advisor table.



The process will only add one advisor to a specific student per effective date. A second advisor input record for that student will be added with a date of “processing date+1”.

7. **UD Student Advisor Load-REMOVE** will re-order remaining advisors so their Advisor #s are sequential – ie...If there were 3 advisors and #2 was deleted, it will add the new row with old #1 and the old #3 will become new #2.
8. In **UD Student Advisor Load**, if the same student is processed in two separate runs of the process on the same day, the second process create a row with an effective date of Process Date+1. The advisor will appear in the Advisor box at *Campus Community > Student Services Center*. The details link will list all advisor info when the effective date is today.
9. A plan must be specified on the top row of the student advisor stack, or else you will get an error when processing that student.
10. Staff should delete the input file after verifying the results. In case of problems, contact the Registrar's office ([dwilder@udel.edu](mailto:dwilder@udel.edu)) and keep the file so that IT can debug the problem.

1-11-19