PLEASE REVIEW BANNER 9 ADMIN PAGES & SSB AND ARGOS: SYSTEMS OVERVIEW AND BASIC INSTRUCTIONS BEFORE YOU BEGIN.

Banner 9 Admin Pages: Multiple Advisors (SGAADVR)

The Multiple Advisor (SGAADVR) form allows a student's advisor history to be recorded.

NOTE: This form allows us to track multiple advisors and advisor types for any given student. This is managed on a term by term basis (term specific). The term typed in the Key Block "Term" field allows you to see the advisor assigned from the term you enter here until an advisor change has been made. Although Banner is "term-driven" which allows you to update advisors for the upcoming term, *it is best not to assign advisors too far into the future* to avoid the amount of maintenance required if advisors are reassigned at a later date. This also allows advisor types other than academic advisors (such as academic skills counselors) to be assigned and maintained by other departments without having to add those assignments to many upcoming and future terms.

Accessing students' advisor records:

1. In the Go To area on the Welcome screen, enter the form name, **SGAADVR**, and press the Enter key.

	Welcome
SGAADVR	×
Multiple Advisors (SGAADVR)	

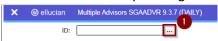
The SGAADVR form will open.

-								
×	@ ellucian	Multiple Advisors SGAADVR	9.3.7 (DAILY)		🔒 ADD	RETRIEVE	RELATED	🇱 TOOLS
	ID:			Term:				Go
Get	Started: Comple	te the fields above and click Go	. To search by name, press TAB f	from an ID field, enter your s	earch criter	ria, and then press	ENTER.	

2. Enter the student ID number and press the Go button



search for a student by clicking the "more" (...) button



and entering the student's last name, first name then click Go.

-						
× @ ellucian Person Search	SOAIDEN 9.3.12 (DAILY)		÷	B	a *	1
PERSON SEARCH			🗄 Insert	Delete	🖷 Сору	🖫 Filter
Basic Filter Advanced Filter						0
ID •	Last Name SSS Test%	First Name Test%	2.			
Middle Name	Change Indicator	•	Add Another Fie	ld ▼		3
					Clear All	Go

- 3. Select the student from the search results and click the **Select** button at the bottom of the page). The student ID and name is entered in the form.
- 4. In the Term field, type the term for which students will be registering (ex: type 201909 for Fall 2019) or select the term from the options in the "more" list (...)



5. Click the **Go** button to get to Advisor Information fields. The 999999 (end of time) in the To Term field signifies that the advisor will carry forth on the student record until the advisor is removed or ended.

ID: 00181994 Sss Test Student, Test T. Term: 201909			Slart Over
* ADVISOR INFORMATION			🗄 Insert 🗧 Delete 📲 Copy Ϋ, Filter
From Term 201801	🖉 Mainter	nance To Term 9:	9999
ID Name	Advisor Type	Advisor Type Description	Primary Indicator *
0050	ACAD	Academic Advisor	
			Record 1 of 1

An advisor may already be assigned for that term. If that is the appropriate advisor and the Primary Indicator is marked appropriately, click the Start Over button at the top of the page to clear the student ID field and enter the next student's ID. If there is no advisor, follow the Add Advisor instructions.

To Remove Advisor

If an advisor was <u>incorrectly</u> assigned (or if the advisor listed never advised the student) their name should be <u>removed</u> from the Advisor list.

1. Enter the student ID, the Term code the advisor was first assigned (*From Term in step 5 above*), and then press the **Go** button.

× @ elluci	an Multiple Advisors SGAADVR 0.3.7 (DAII	Y)	2 ⁺ ^	dd 🗎 Re	TRIEVE 🛔 R	ELATED	toous
	ID: 00181994	Term: 201	1801			G	0
	Sss Test Student, Test T.						
Click on in							
CIICK ON IN	correctly assigned advisor	's name and click the Del	lete button.				
	COrrectly assigned advisor n Multiple Advisors SGAADVR 9.3.7 (DAILY)	's name and click the Del	lete button.	ADD	Retrieve	A RELATED	🔆 тос
× @ elluciar	, ,	's name and click the Del	lete button.	ADD			🔆 TOC
× @ elluciar	Multiple Advisors SGAADVR 9.3.7 (DAILY) Test Student, Test T. Term: 201801	's name and click the Del	lete button.	ADD	2		tart Over

From T	erm 201801	<u>e</u> /	Maintenance	To Term	999999
ID	Name	Advisor Type	Advisor Type Description		Primary Indicator *
005	C.	ACAD	Academic Advisor		✓
🖌 🛋 🚺 of 1	► ► 10 ▼ Per Page				Record 1 of 1

- Click the Save button to save the change if done
- 4. Click the Start Over button if you are done with that student's record. Clear the student ID field to enter the next student's ID.

To Add Advisor

1. Enter the student ID, the Term in which the advisor assignment is effective, and then press the **Go** button.

× Ø ellucian	Multiple Advisors SGAADV 3.3.7 (DAILY)	2	🔒 ADD	🖺 RETRIEVE	🔅 TOOLS
ID	00181994 Sss Test Student, Test T.	Term: 201909			Go
Get Started: Compl	te the fields above and click Go. To search by name, press TAB from an ID fie	ld, enter your search criteria, and then press ENTER.			

If the Block Header Term <u>does not</u> match the From Term on the advisor information record, continue on to step 3.
 --OR--

If the Block Header Term matches the From Term on the advisor information record, continue on to step 5.

3. When the Block Header Term (aka the effective term of the advisor you entered) does not match the From Term on the advisor information record, Click the **Maintenance** button

×	@ ellucian	Multiple Advisors SGAADVR 9.3.7 (DAIL	Y)	
ID: 00	181994 Sss Te	st Student, Test T. Term: 201909		
· ADVI	SOR INFORMATIC	DN	•	
	From Term	201801		Maintenance
ID	Name		Advisor Type	Advisor Type Description
00		and the second se	ACAD	Academic Advisor
	(1 of 1 🕨)	Per Page		

4. If you are terminating **all** advisors listed on the screen and assigning new advisors for the new effective term, click the **End Advisor** option



-OR -

If you are ending **some** of the advisors listed on the screen, but not all, or you are not inactivating any advisors, just adding additional, click on the **Copy** Advisor option



5. Click on the incorrectly assigned advisor's name (if applicable) and click the Delete button.

¥ @ ell	lucian	Multiple Advisors SGAADVR	9 3 7 (DAILY)	•			ADD	RETRIEVE	島 RELATED	🔆 TOOLS
	lacian		5.5.1 (BARET)							
ID: 00181994	D: 00181994 Sss Test Student, Test T. Term: 201801									tart Over
ADVISOR INF	ORMATIO	N						🖶 Insert	Delete 🗖 C	opy 🔍 Filter
Fro	om Term	201801		(<u> </u>	Naintenance		To Term	999999		
ID	Nam	e	Advisor Ty	/pe	Advisor Type Descrip	otion		Primary Indicator *		
005	-	C. 🗲	ACAD		Academic Advisor				V	
K 🛋 1 o	of 1 🕨 🕨	10 🔻 Per Page								Record 1 of 1

Do this for every advisor you are not carrying over to the new effective term record

- 6. Click Insert to add new advisor
- 7. Enter Advisor ID, or Enter the Advisor Name to add as Last Name, First Name. Include a wildcard character (%) to search any other characters in the name, then press the **Enter** key

X @ ellucian Multiple Advisors SGAADVR 9.3.7 (DAILY)		÷	ADD 🖺 RE	ETRIEVE 🛛 🛔 REL	ATED 🛛 🔆 TOOL
ID: 00181994 Sss Test Student, Test T. Term: 201801				C	Start Over
ADVISOR INFORMATION			0	Insert 📮 Delete	Copy 🔍 Filt
From Term 221601	🚊 Mainter	To Ter	m 9999999		
ID Name	Advisor Type	Advisor Type Description		Primary Indicator *	
SSS%, Test%					

8. If more than one match is found, click Press to See Results



9. Select the advisor from the extended search results, and click OK

Extended Search X
Criteria Q
Name and ID
100 fee Braique Too fee BRIDHR
SSS Test Faculty, Test Test 00674848
The first Budget from fait (RECEIPTER
The Second Second Second Second Second Second
And Secretarians, New Yorking Karl Social Secretarian
Income Country, Country, Security (1991)
2017 Text Disabet. Text lead 2017/2014
THEY Take Discound. Take and DETUTION.
NEW YAR DALLARS, YAR AND COLUMN
۰. ۲
Image: Non-State Image: Non-State Per Page Per
Cancel ОК

10. Enter Advisor Type Code or click the "more" (...) button, select the code, and click OK.

×	ellucian Multiple Advisors SGAADVR 9.3	7 (DAILY)		👔 ADD 🖺 RETRIEVE 🗸 RELATED 🔅	TOOLS			
ID: 0018	D: 00181994 Sss Test Student, Test T. Term: 201801 Start Ove							
ADVISO	RINFORMATION		OR	😫 Insert 🗖 Delete 🥤 Copy	Ÿ, Filter			
	From Term 201801	× 1	🖉 Maintenance	To Term 999999				
ID	Name	Advisor Type	2 sor Type Description	Primary Indicator *				
0067	SSS Test Faculty, Test T.	ACAD						
	1 of 1 🕨 刘 🛛 10 🔻 Per Page		<u> </u>	Recor	d 1 of 1			

11. Check (or uncheck) the box under Primary Indicator. The Primary Advisor appears on student records, etc. Only one advisor can be marked as Primary Advisor.

×@	ellucian Multiple Advisors SGAADVR 9.3.7 (I	DAILY)		1	add 💾 Retrieve	뤎 REL/	ATED 🔅 TOOLS
ID: 00181	ID: 00181994 Sss Test Student, Test T. Term: 201801						Start Over
* ADVISOR	RINFORMATION				🗄 Insert	Delete	Copy 🔍 Filter
	From Term 201801	(<u> </u>	To Term	999999		
ID	Name	Advisor Type	Advisor Type Description		Primary Indicator *		
00674	SSS Test Faculty, Test T.	ACAD	Academic Advisor				
	1 of 1 🕨 🔰 10 🔻 Per Page		Not	te: Only one advisor can be mar	ked as Primary	_	Record 1 of 1
							2
							SAVE

Advisor	Description	Primary Indicator		
Code				
ACAD	Academic Advisor (for Undergraduate Students	One Advisor must be checked as Primary (only one		
	only)	can be the primary)		
ACSK	Academic Skills	Do not check as Primary		
ATHL	Athletics Advisor	Do not check as Primary		
PEER	Peer Advisor	Do not check as Primary		
PROG	Program Coordinator (for Graduate Students	Do not check as Primary		
	only – oversees entire program)			
PRAD	Program Advisor (for Graduate Students only –	One Advisor must be checked as Primary (only one		
	advises students)	can be the primary)		
VETS	Veteran Advisor	Do not check as Primary		

12. Click Save.



13. Click Start Over if you are done with that student's record. Clear the student ID field to enter the next student's ID.

🔒 ADD		A REL	ATED	🏶 TOOLS	
		- 4	Start Over		
	🕂 Insert	Delete	🖪 Сору	👻 Filter	

Please note: the Maintenance icon options of "End Advisor" and "Copy Advisor" affect <u>all</u> advisors listed in a given term array.

The Term Codes below are an example to help you with the process.

When to use "End Advisor":

Ex: The student was assigned an advisor for Fall 2018. The student changed majors effective Fall 2019. Part 1: Update the student's record by ending previous advisor term. Part 2: Add new advisor for Fall 2019.

If there is <u>only one</u> advisor for the term – follow this 2-part instruction:

<u>Part 1</u>

- 1. Enter the student ID and 201909 Term code, and click Go.
- 2. Click on the From Term field to activate the Maintenance button
- 3. Click the Maintenance button and select "End Advisor". 201909 will be populated in the **To Term** field.

🚊 Maintenance

🚊 Maintenance

4. Click Save.

<u>Part 2</u>

- 5. Click Start Over.
- 6. Enter 201909 in the Term field.
- 7. Click Go. The From Term field will populate with the same term shown in the Term field.
- 8. Enter the advisor ID or Name and Advisor Type and click the Primary Indicator box (or not).
- 9. Click Save.
- Click Start Over if you are done with that student's record.

When to use "Copy Advisor":

Ex: The student was assigned multiple advisors for Fall 2018. The student changed majors effective Fall 2019. Part 1: Update the student's record by ending previous advisor term and copying those advisors to the new term. Part 2: End some but not all advisors, and Add new advisors for Fall 2019.

If there are <u>multiple</u> advisors listed for the term – follow these instructions to maintain the continuance of the additional advisors listed:

- 1. Enter the student ID and 201909 Term code, and click Go.
- 2. Click on the From Term field to activate the Maintenance button
- 3. Click on the Maintenance button and select Copy Advisor.
- 4. The From Term now indicates the same term in the Key Block and the To Term is 999999.
- 5. Click on the row with the advisor's name to be ended and click the Delete button (do this for all advisors to be ended).
- 6. Click the Insert to add any additional advisors.
- 7. Enter the advisor ID or Name and Advisor Type and click the Primary Indicator box (or not).
- 8. Click Save.
- Click Start Over if you are done with that student's record. Clear the student ID field to enter the next student's ID.

To return to the Welcome page, click the Exit icon 🔀 in the Toolbar.