Assigning Academic Advisors in PeopleSoft

Business Process Guide

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CAL POLY POMONA

Assigning Academic Advisors in PeopleSoft

This Business Process Guide explains the steps involved in assigning an academic advisor to a student in PeopleSoft. Utilizing this proprietary Batch Processing system, students may be assigned to an advisor (or multiple advisors) that is reflected in BroncoDirect. Students may view all advisors assigned to them on the Student Center page, providing a centralized location to access advisor information. Faculty and staff advisors may view their list of assigned advisees in the Advisor Center. The Batch Processing functions will streamline the process of adding advisees to advisors.

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Introduction

The Assigning Academic Advisor Batch Processing function consists of three major processes: **Initial Assignment Advisor**, **Change Assignment Advisor**, and **Assign Advisors by Spreadsheet**. You can choose whichever process works best for your department or program.

The **Initial Assignment Advisor** process is used to assign advisors to the students who have no advisor assigned in the PeopleSoft system. In many cases, they are first-time freshman or transfer students. This process has three options. They can be used as described below:

1. Assign to an Advisor: to assign a single advisor to a group of students;
2. Assign by Alpha: to assign multiple advisors to a group of students based on the alpha value of student names;
3. Assign by Student Group: to assign multiple advisors to a group of students based on student group codes.

The **Change Assignment Advisor** process is used to assign advisors to the students who have been assigned advisors previously in the PeopleSoft system. This process has five options. They can be used as described below:

1. Advisor 1 to Advisor 2: to re-assign all of Advisor 1's students to Advisor 2;
2. Assign by Alpha: to re-assign all or part of an advisor's students to multiple advisors based on the alpha value of student names;
3. Assign by GPA: to re-assign all or part of an advisor's students to multiple advisors based on students' GPA;
4. Assigned by Class Level: to re-assign all or part of an advisor's students to multiple advisors based on students' class level (freshman, sophomore, junior, senior, etc.);
5. Assign by Student Group: to re-assign all or part of an advisor's students to multiple advisors based on student group codes.

Another option is to use the **Assign Advisors by Spreadsheet** process. The process is used to assign a single advisor or multiple advisors to a group of students regardless of whether the students have pre-assigned advisors in the PeopleSoft system or not. The process takes a student's Bronco number and assigns an advisor specified for the student. There is a one-to-one relationship for each student and his or her advisor. The relationship is given in a spreadsheet.

1. Assign group of students to one advisor
2. Assign multiple groups of students to multiple advisors

The most effective method for departments and programs will be the **Assign Advisors by Spreadsheet** process, particularly if you have multiple advisors and multiple advisees. You can skip to that section in the manual if that is your process of choice.

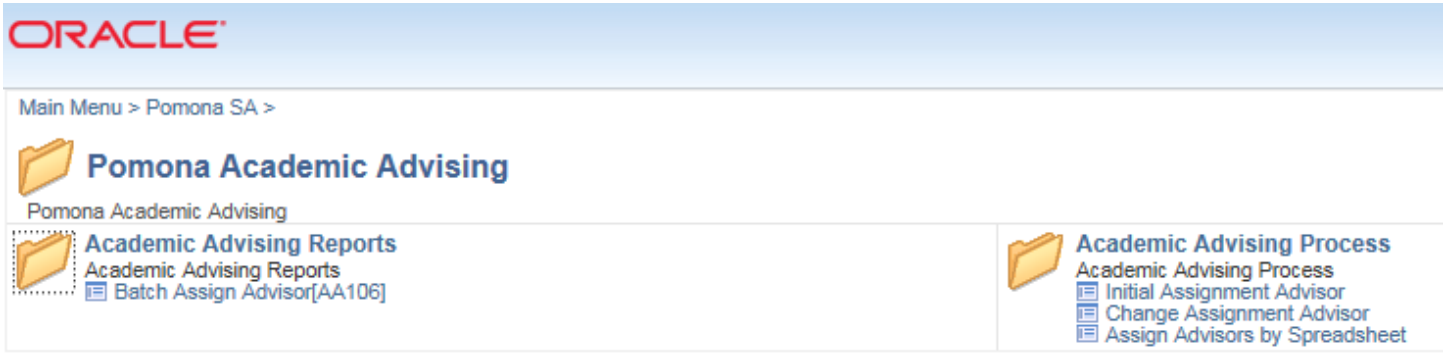
Getting Started: Navigation to Assigning Advisors in Batch

1.) To begin you will need the Bronco IDs of the Advisors and students that you are assigning. Then log on to the PeopleSoft System.

2.) Select Pomona SA

3.) Select Pomona Academic Advising

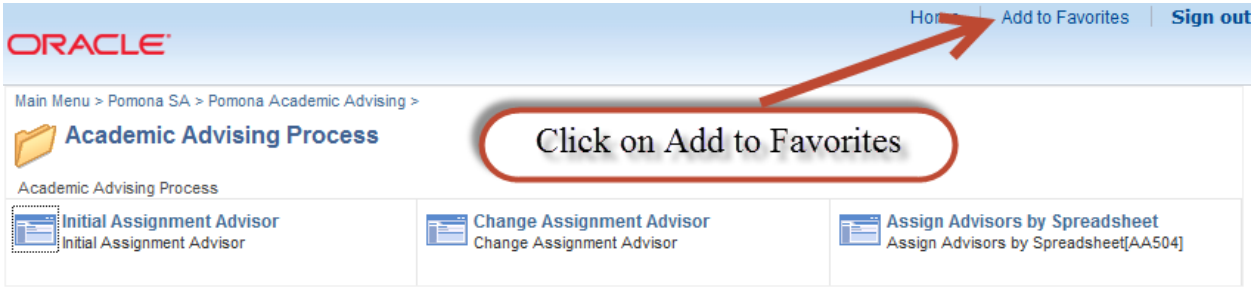
4.) Select "Academic Advising Process"



Adding Batch Assignment of Advisors to Favorites

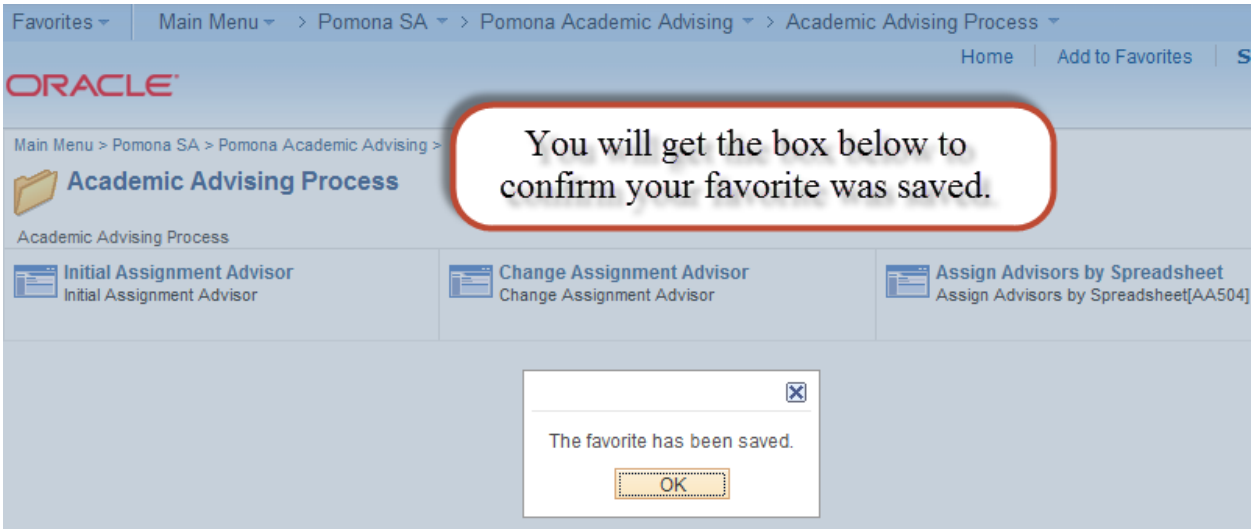
To save the Academic Advising Process to your favorites: follow these steps:

1.)

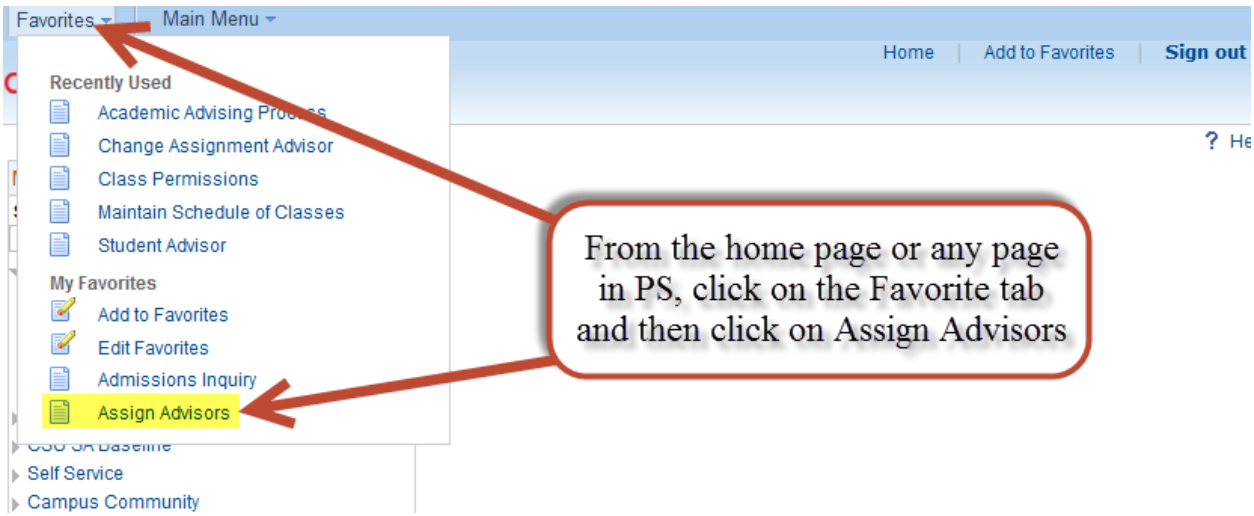


2.)

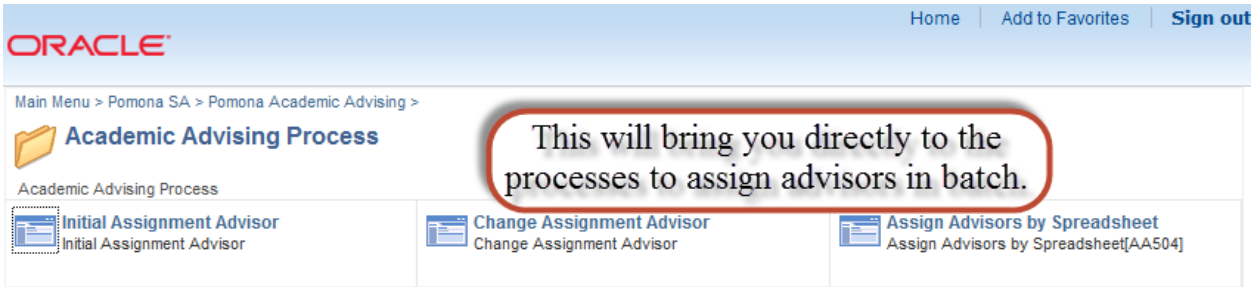
3.)


Favorites
Main Menu
Pomona SA
Pomona Academic Advising
Academic Advising Process
Home
Add to Favorites
ORACLE
Main Menu > Pomona SA > Pomona Academic Advising >
Academic Advising Process
You will get the box below to confirm your favorite was saved.
Academic Advising Process
Initial Assignment Advisor
Initial Assignment Advisor
Change Assignment Advisor
Change Assignment Advisor
Assign Advisors by Spreadsheet
Assign Advisors by Spreadsheet[AA504]
The favorite has been saved.
OK

4.)


Favorites
Main Menu
Home
Add to Favorites
Sign out
Recently Used
Academic Advising Process
Change Assignment Advisor
Class Permissions
Maintain Schedule of Classes
Student Advisor
My Favorites
Add to Favorites
Edit Favorites
Admissions Inquiry
Assign Advisors
From the home page or any page in PS, click on the Favorite tab and then click on Assign Advisors
Self Service
Campus Community

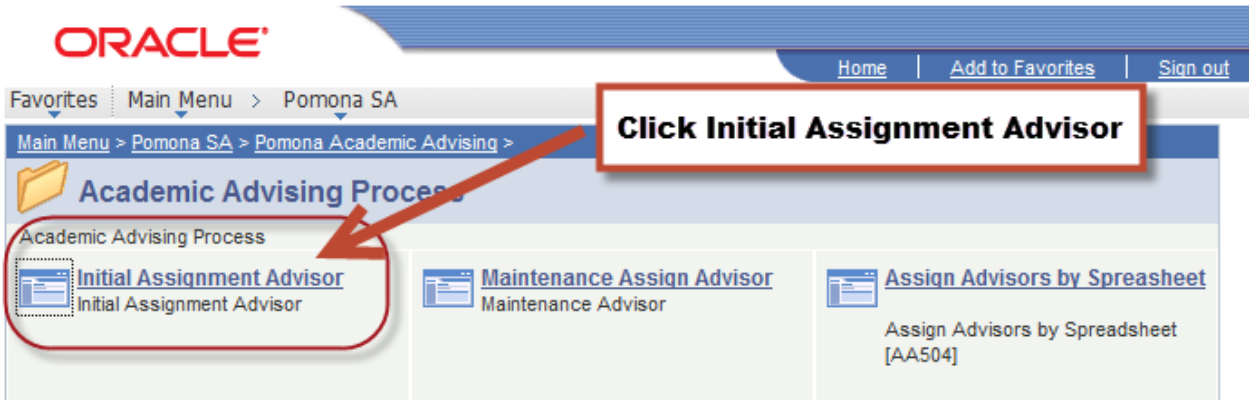
5.)


Home
Add to Favorites
Sign out
ORACLE
Main Menu > Pomona SA > Pomona Academic Advising >
Academic Advising Process
This will bring you directly to the processes to assign advisors in batch.
Academic Advising Process
Initial Assignment Advisor
Initial Assignment Advisor
Change Assignment Advisor
Change Assignment Advisor
Assign Advisors by Spreadsheet
Assign Advisors by Spreadsheet[AA504]

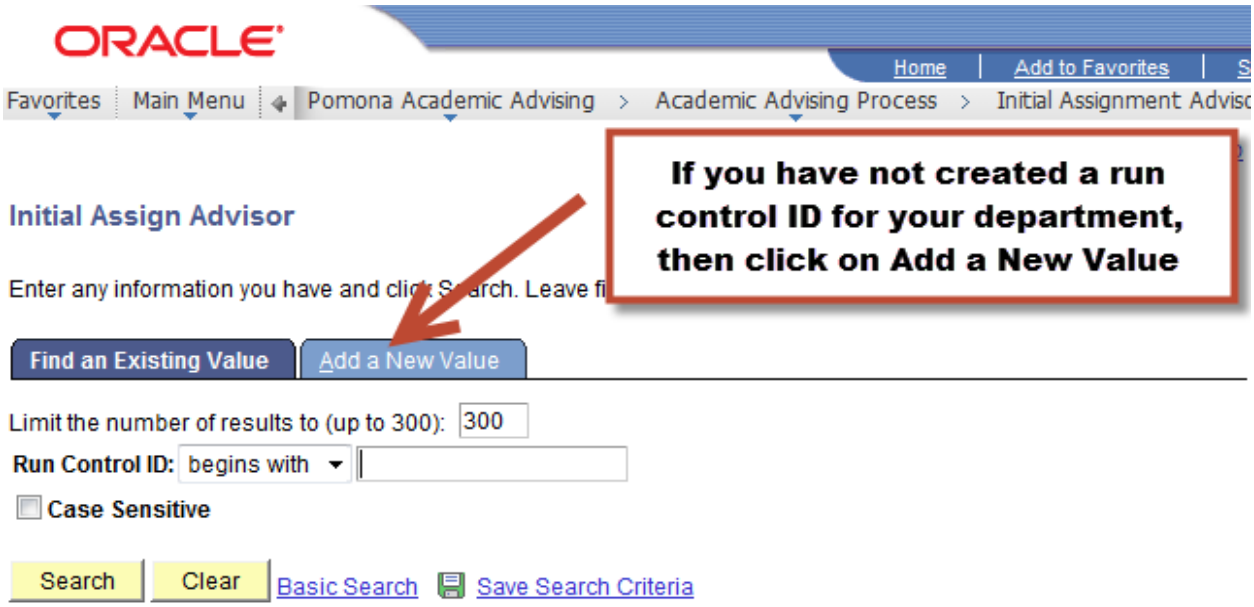
Initial Assignment of Advisors

Once advisors are assigned to all students in your department, the only students who will require initial assignment each year are new, incoming freshmen and transfer students. This process is specifically designed to assign advisors to those students admitted for a given term.

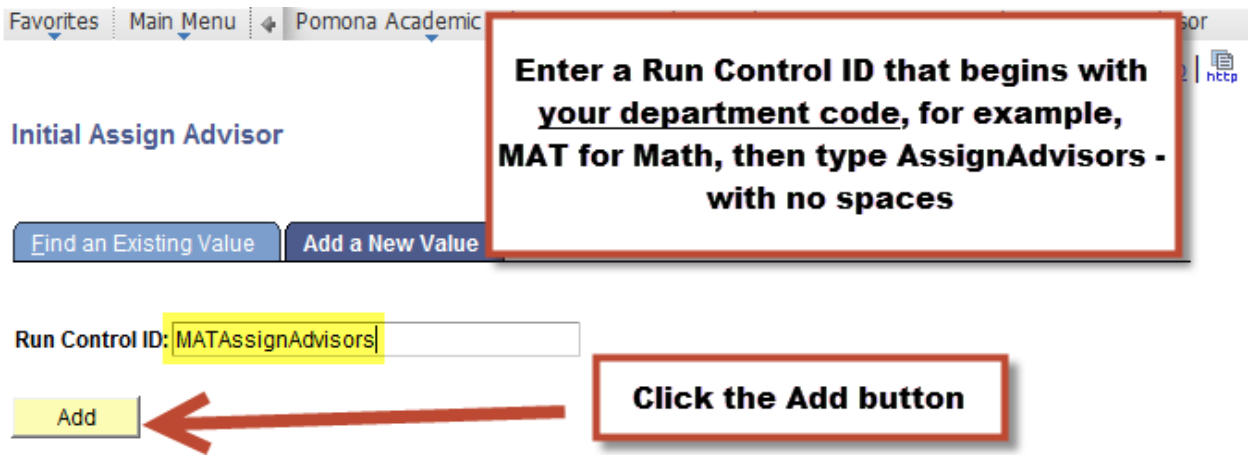
1.)



1a.)

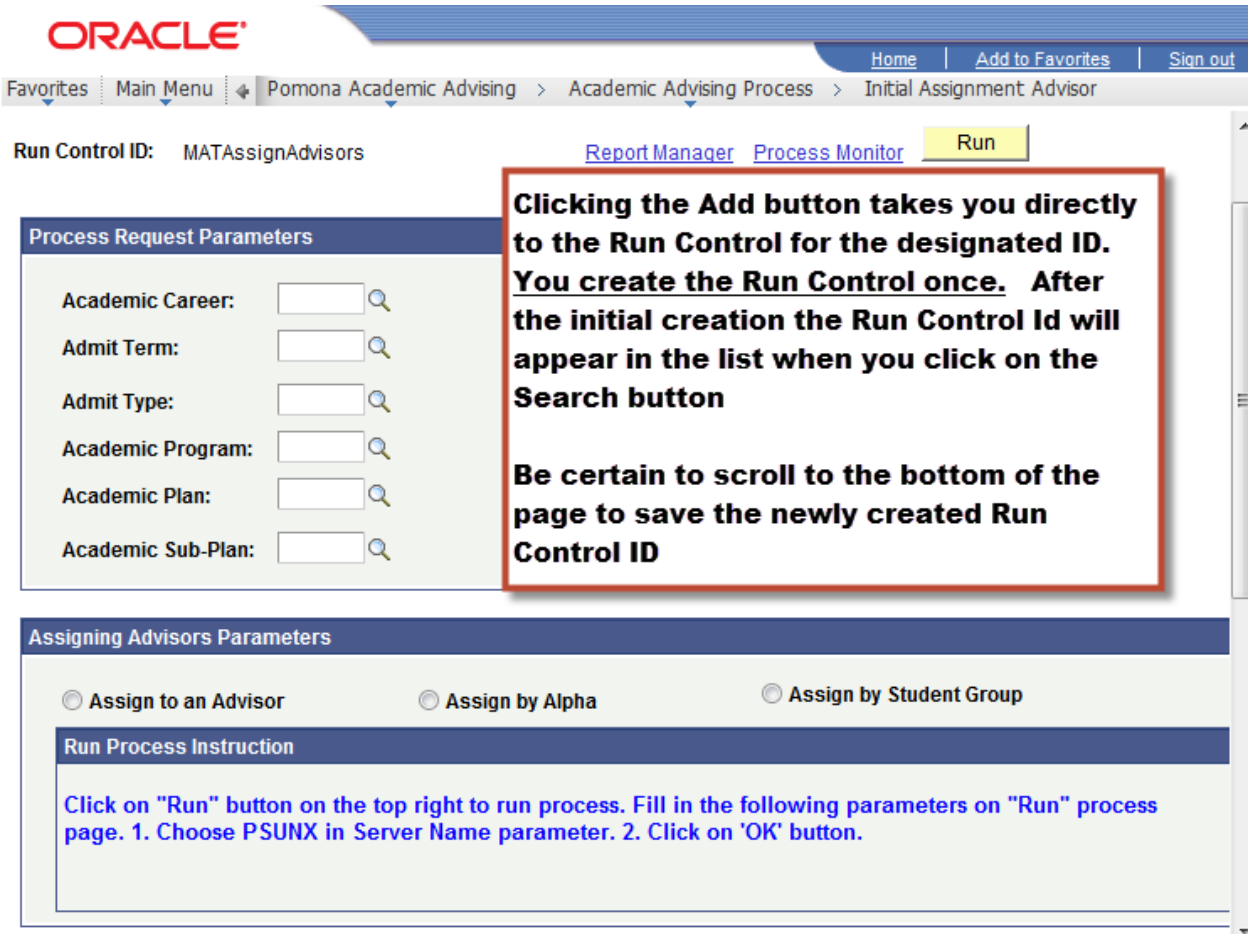


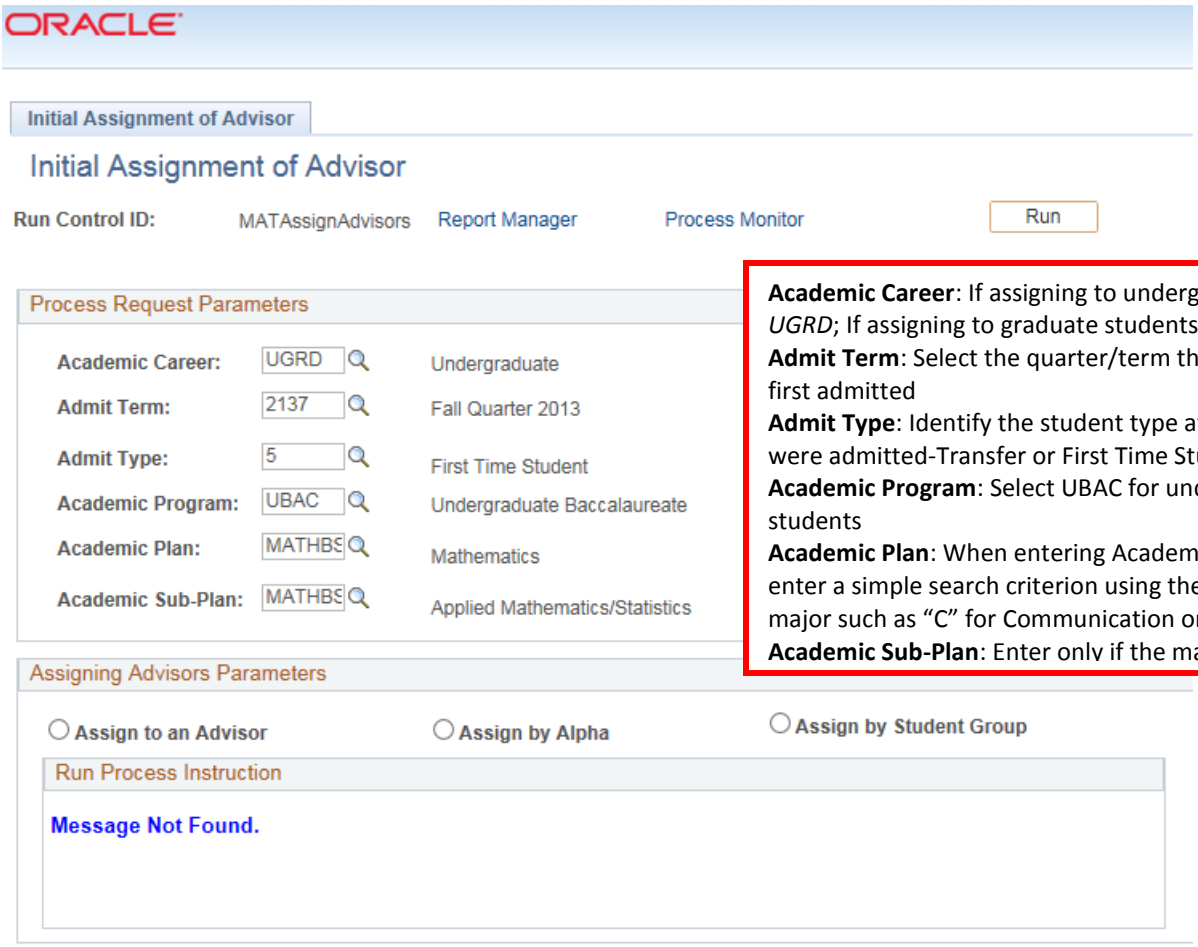
1b.)



Note: Steps 1a and 1b are done once for each department. Your department code will appear in the select list once it has been created.

2.)



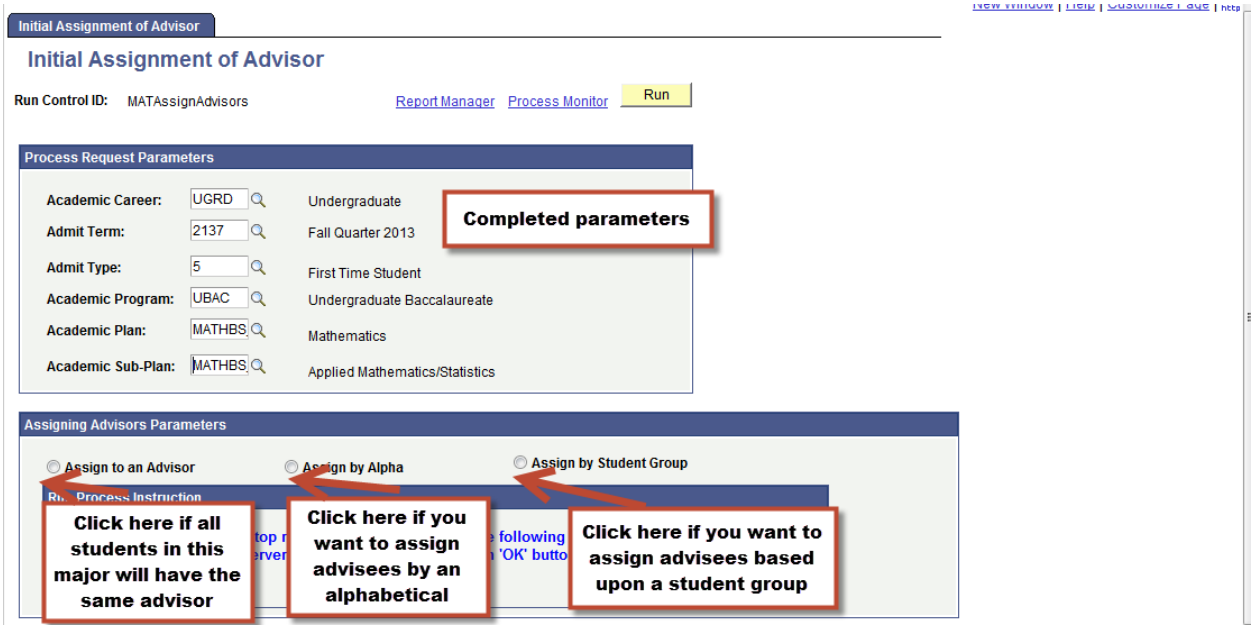


Academic Career: If assigning to undergraduates select *UGRD*; If assigning to graduate students select *PBAC.*
Admit Term: Select the quarter/term that your student was first admitted
Admit Type: Identify the student type at the quarter they were admitted-Transfer or First Time Student
Academic Program: Select UBAC for undergraduate students
Academic Plan: When entering Academic Plan value below, enter a simple search criterion using the first letter of a major such as "C" for Communication or "A" for Arts.
Academic Sub-Plan: Enter only if the major has a sub-plan

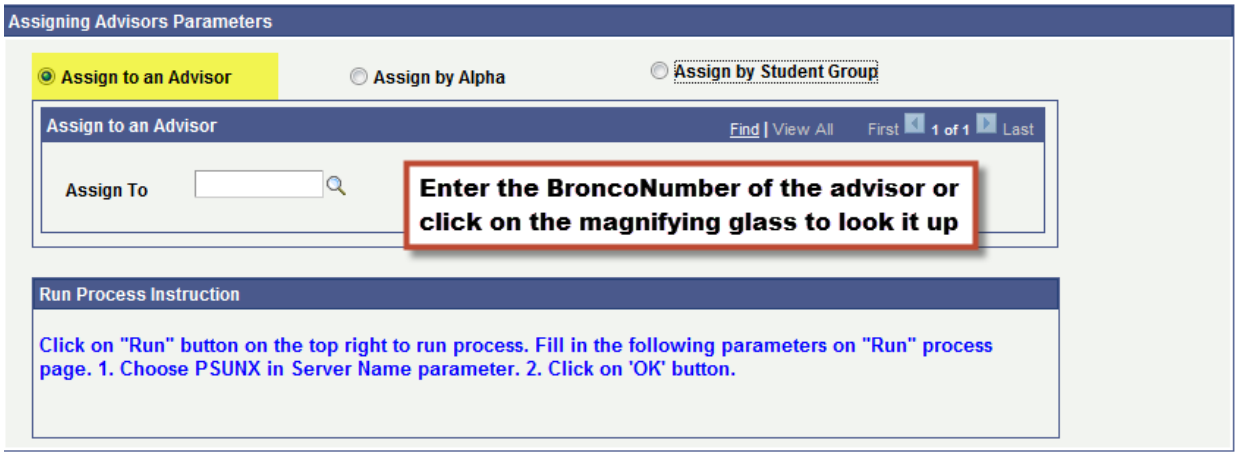
3.)

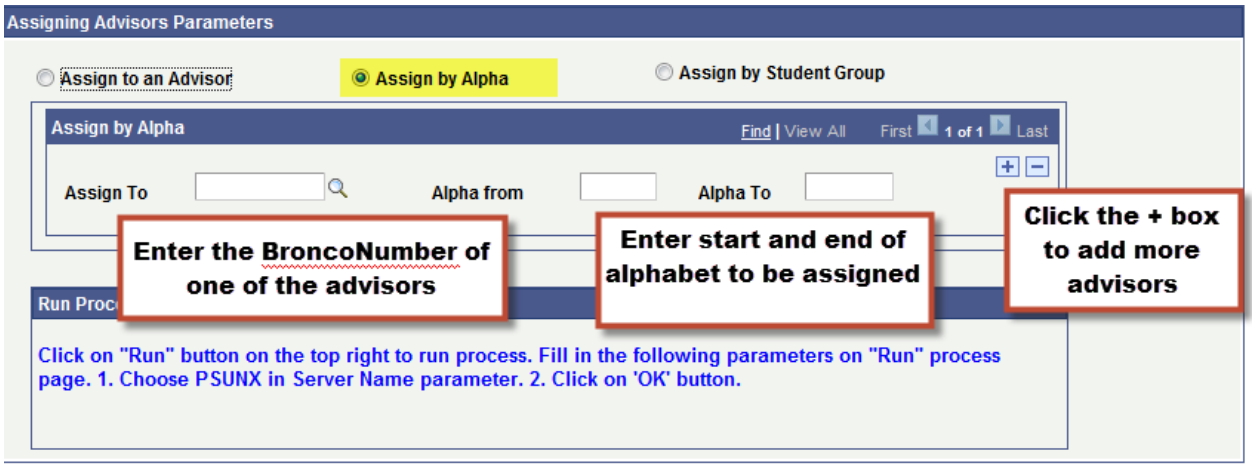
Initial Assign Advisor
Enter any information you have and click Search. Leave fields blank for a list of all v
If you have created a run control ID for your department, put the first letter of run control ID here and then click search
Find an Existing Value
Add a New Value
Limit the number of results to (up to 300): 300
Run Control ID: begins with m
Case Sensitive
Search
Basic Search
Save Search Criteria
Search Results
View All First 1-2 of 2 Last
Run Control ID
Language Code
MATAssignAdvisors
milestones
English
Select the appropriate run control ID
Find an Existing Value | Add a New Value

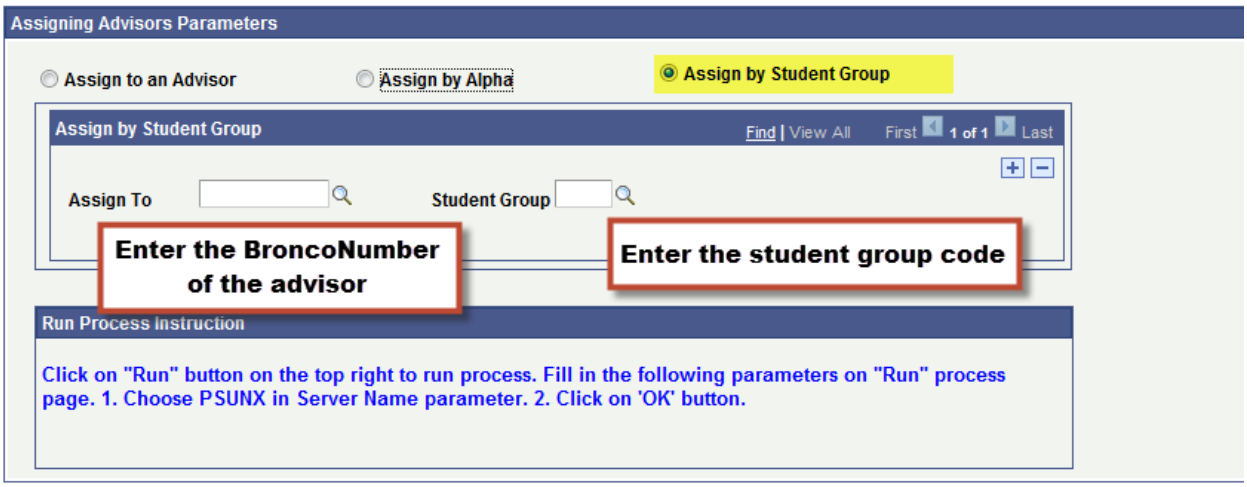
4.)


Initial Assignment of Advisor
Initial Assignment of Advisor
Run Control ID: MATAssignAdvisors
Report Manager
Process Monitor
Run
Process Request Parameters
Academic Career: UGRD Undergraduate
Admit Term: 2137 Fall Quarter 2013
Admit Type: 5 First Time Student
Academic Program: UBAC Undergraduate Baccalaureate
Academic Plan: MATHBS Mathematics
Academic Sub-Plan: MATHBS Applied Mathematics/Statistics
Completed parameters
Assigning Advisors Parameters
Assign to an Advisor
Assign by Alpha
Assign by Student Group
Click here if all students in this major will have the same advisor
Click here if you want to assign advisees by an alphabetical
Click here if you want to assign advisees based upon a student group

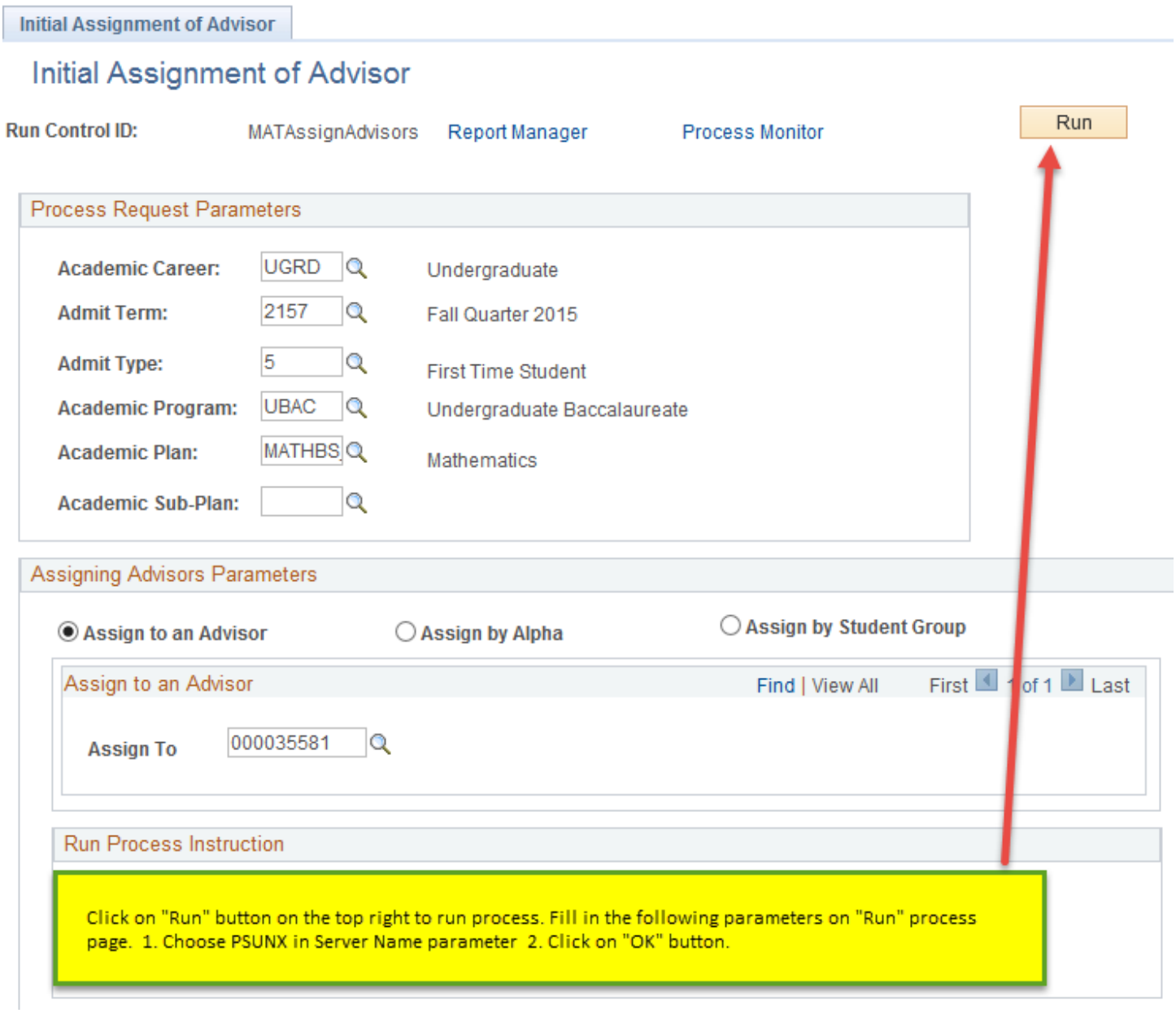
5.)

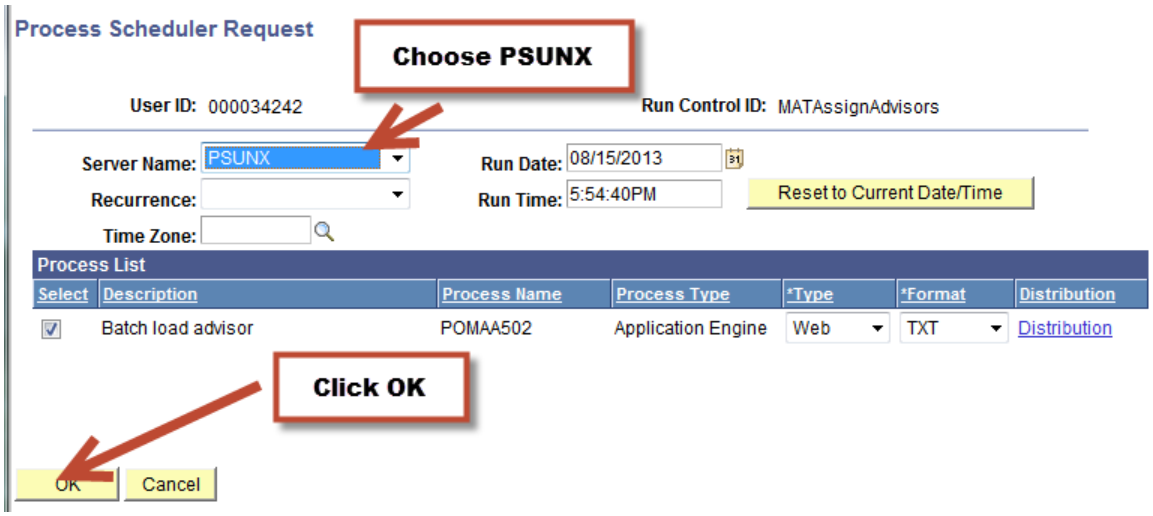

Assigning Advisors Parameters
Assign to an Advisor
Assign by Alpha
Assign by Student Group
Assign to an Advisor
Find | View All
First 1 of 1 Last
Assign To
Enter the BroncoNumber of the advisor or click on the magnifying glass to look it up
Run Process Instruction
Click on "Run" button on the top right to run process. Fill in the following parameters on "Run" process page. 1. Choose PSUNX in Server Name parameter. 2. Click on 'OK' button.


Assigning Advisors Parameters
Assign to an Advisor
Assign by Alpha
Assign by Student Group
Assign by Alpha
Find | View All
First 1 of 1 Last
Assign To
Alpha from
Alpha To
Enter the BroncoNumber of one of the advisors
Enter start and end of alphabet to be assigned
Click the + box to add more advisors
Run Proc
Click on "Run" button on the top right to run process. Fill in the following parameters on "Run" process page. 1. Choose PSUNX in Server Name parameter. 2. Click on 'OK' button.

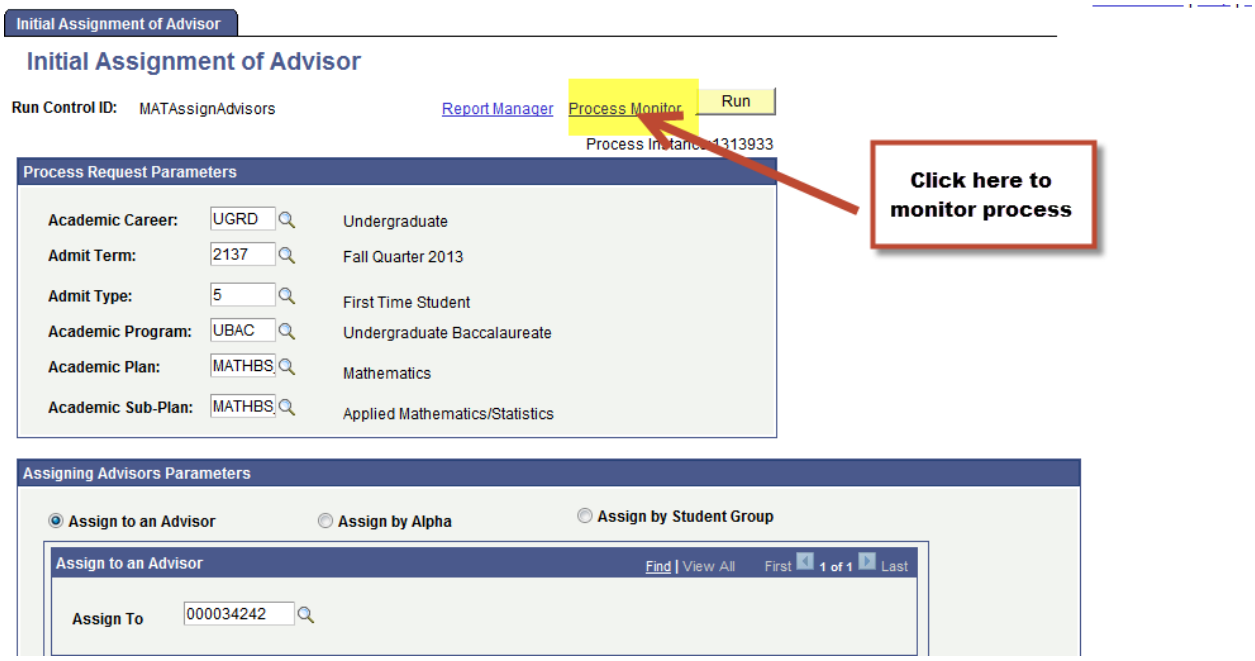

Assigning Advisors Parameters
Assign to an Advisor
Assign by Alpha
Assign by Student Group
Assign by Student Group
Find | View All
First 1 of 1 Last
Assign To
Student Group
Enter the BroncoNumber of the advisor
Enter the student group code
Run Process Instruction
Click on "Run" button on the top right to run process. Fill in the following parameters on "Run" process page. 1. Choose PSUNX in Server Name parameter. 2. Click on 'OK' button.

6.)

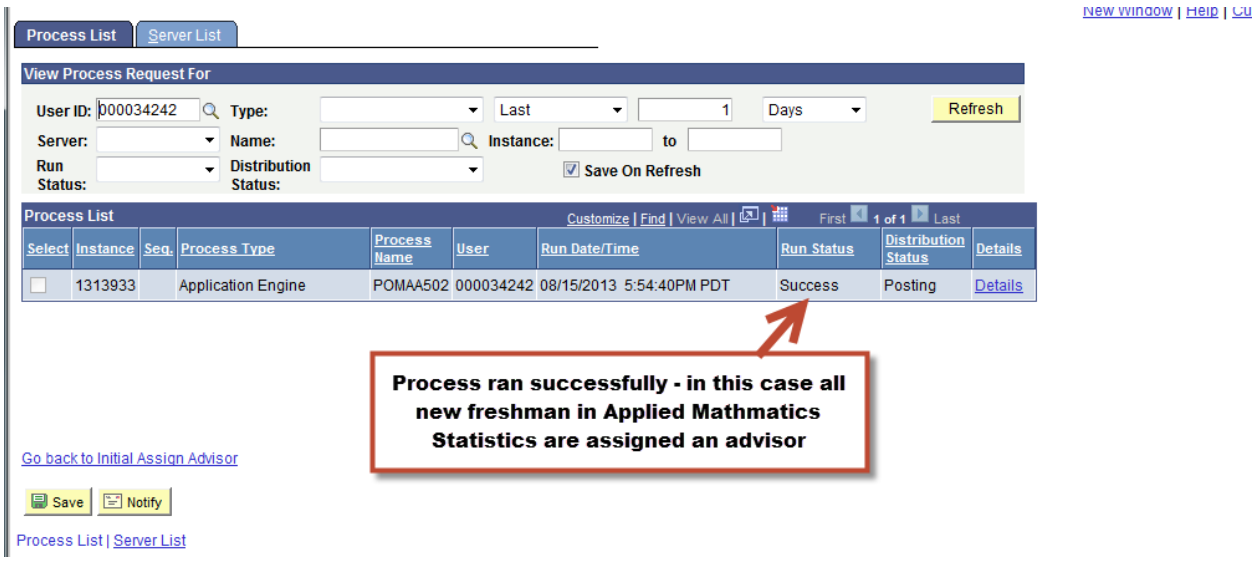

Initial Assignment of Advisor
Initial Assignment of Advisor
Run Control ID:
MATAssignAdvisors
Report Manager
Process Monitor
Run
Process Request Parameters
Academic Career:
UGRD
Undergraduate
Admit Term:
2157
Fall Quarter 2015
Admit Type:
5
First Time Student
Academic Program:
UBAC
Undergraduate Baccalaureate
Academic Plan:
MATHBS
Mathematics
Academic Sub-Plan:
Assigning Advisors Parameters
Assign to an Advisor
Assign by Alpha
Assign by Student Group
Assign to an Advisor
Find | View All
First 1 of 1 Last
Assign To
000035581
Run Process Instruction
Click on "Run" button on the top right to run process. Fill in the following parameters on "Run" process page. 1. Choose PSUNX in Server Name parameter 2. Click on "OK" button.


Process Scheduler Request
Choose PSUNX
User ID: 000034242
Run Control ID: MATAssignAdvisors
Server Name: PSUNX
Run Date: 08/15/2013
Recurrence:
Run Time: 5:54:40PM
Reset to Current Date/Time
Time Zone:
Process List
Select
Description
Process Name
Process Type
*Type
*Format
Distribution
Batch load advisor
POMAA502
Application Engine
Web
TXT
Distribution
Click OK
OK
Cancel

7.)

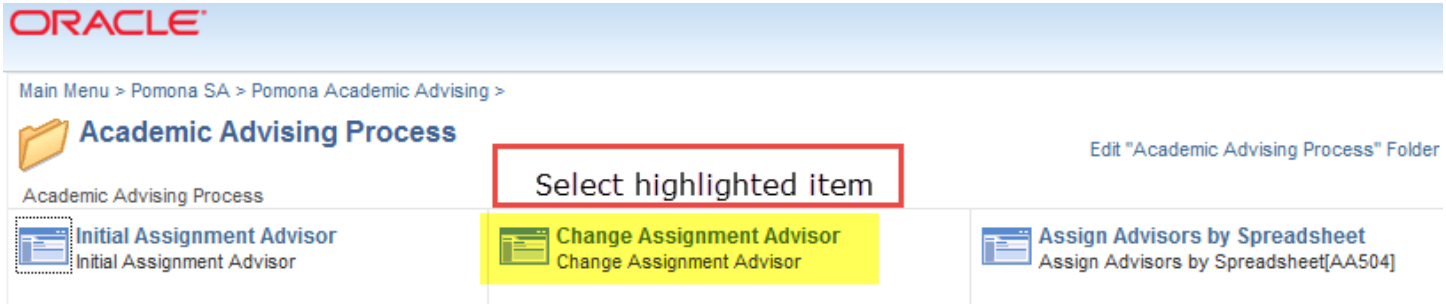

Initial Assignment of Advisor
Initial Assignment of Advisor
Run Control ID: MATAssignAdvisors
Report Manager
Process Monitor
Run
Process Request Parameters
Academic Career: UGRD Undergraduate
Admit Term: 2137 Fall Quarter 2013
Admit Type: 5 First Time Student
Academic Program: UBAC Undergraduate Baccalaureate
Academic Plan: MATHBS Mathematics
Academic Sub-Plan: MATHBS Applied Mathematics/Statistics
Click here to monitor process
Assigning Advisors Parameters
Assign to an Advisor
Assign by Alpha
Assign by Student Group
Assign to an Advisor
Find | View All
First 1 of 1 Last
Assign To 000034242

8.)

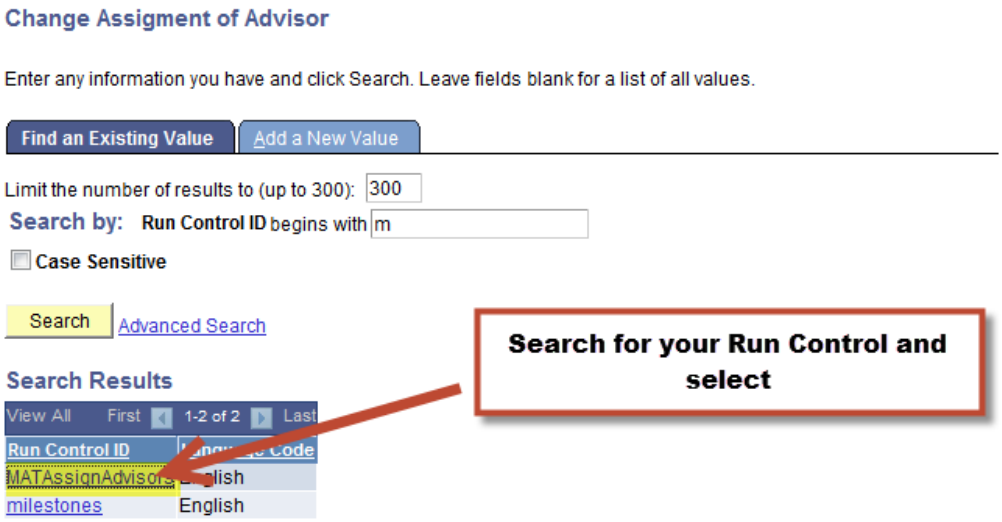


Change Assignment of Advisors

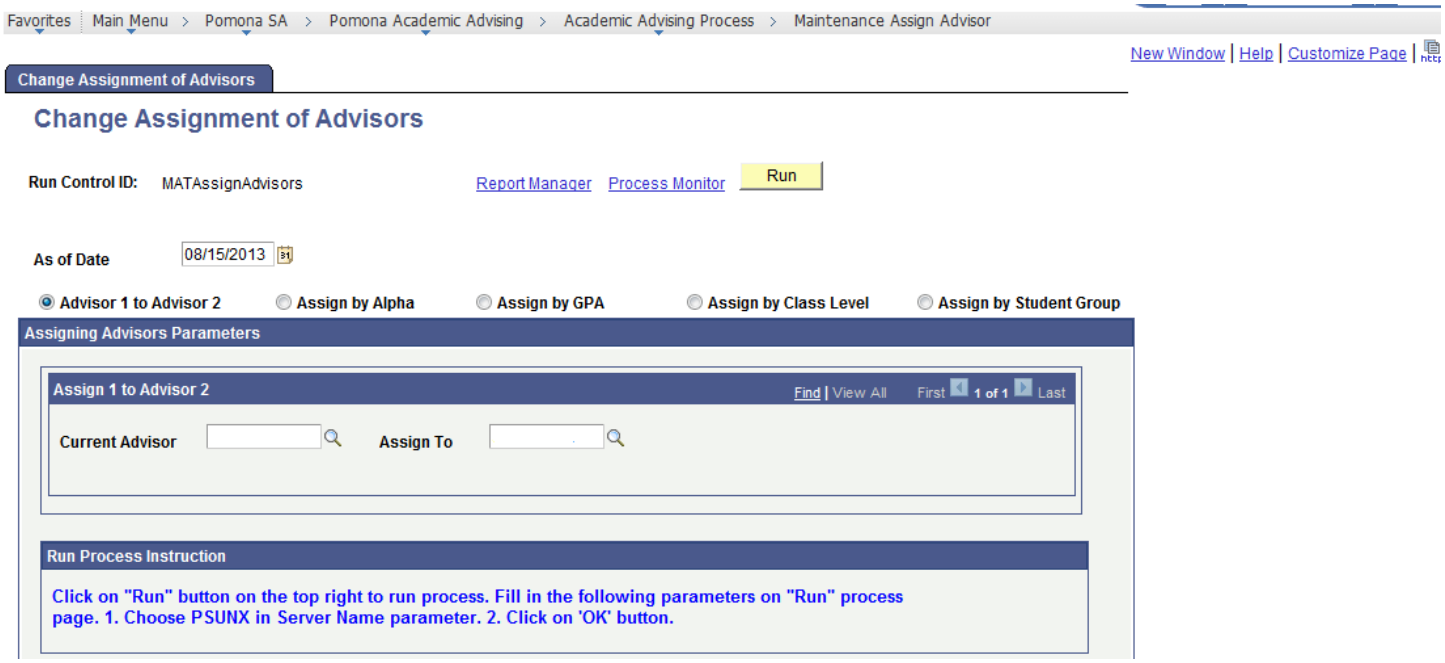
1.)



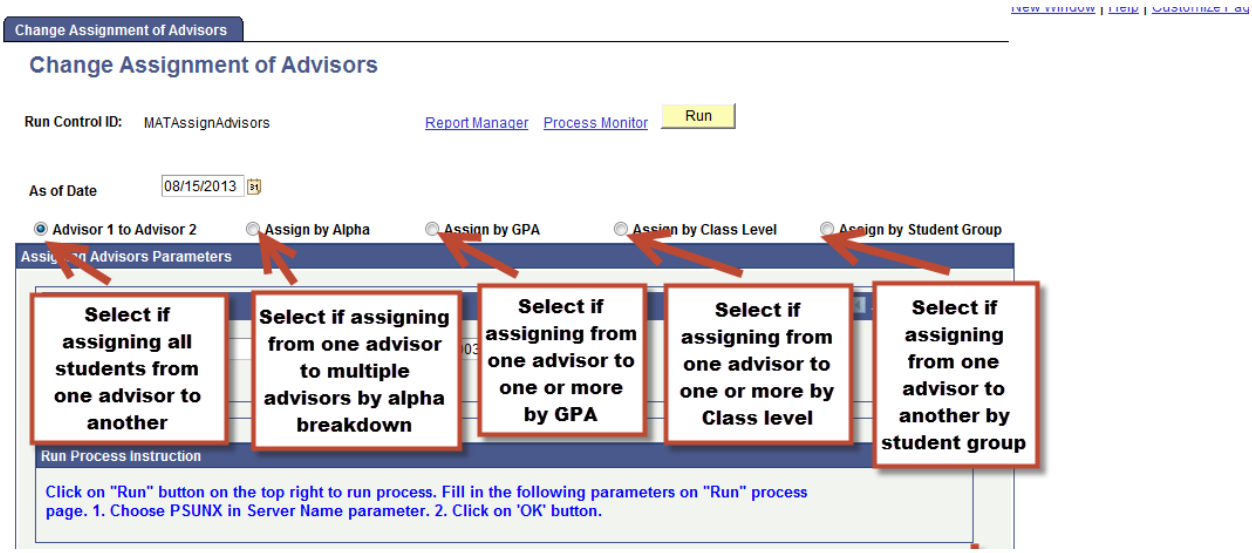
2.)


Change Assigment of Advisor
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value
Add a New Value
Limit the number of results to (up to 300): 300
Search by: Run Control ID begins with m
Case Sensitive
Search
Advanced Search
Search Results
View All First 1-2 of 2 Last
Run Control ID
MATAssignAdvisors English
milestones English
Search for your Run Control and select

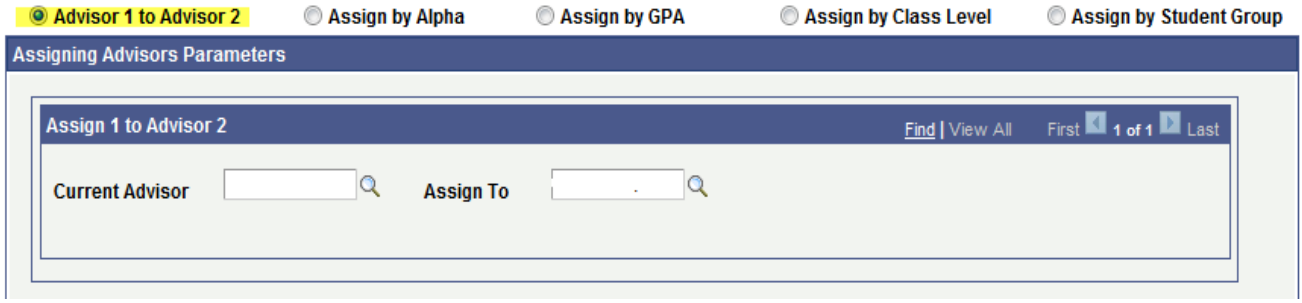
3.)

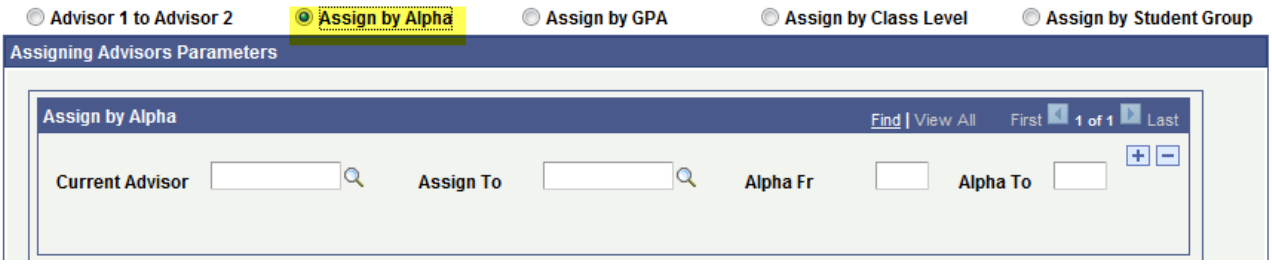

Favorites Main Menu > Pomona SA > Pomona Academic Advising > Academic Advising Process > Maintenance Assign Advisor
New Window | Help | Customize Page
Change Assignment of Advisors
Change Assignment of Advisors
Run Control ID: MATAssignAdvisors
Report Manager
Process Monitor
Run
As of Date 08/15/2013
Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Assigning Advisors Parameters
Assign 1 to Advisor 2
Find | View All First 1 of 1 Last
Current Advisor
Assign To
Run Process Instruction
Click on "Run" button on the top right to run process. Fill in the following parameters on "Run" process page. 1. Choose PSUNX in Server Name parameter. 2. Click on 'OK' button.

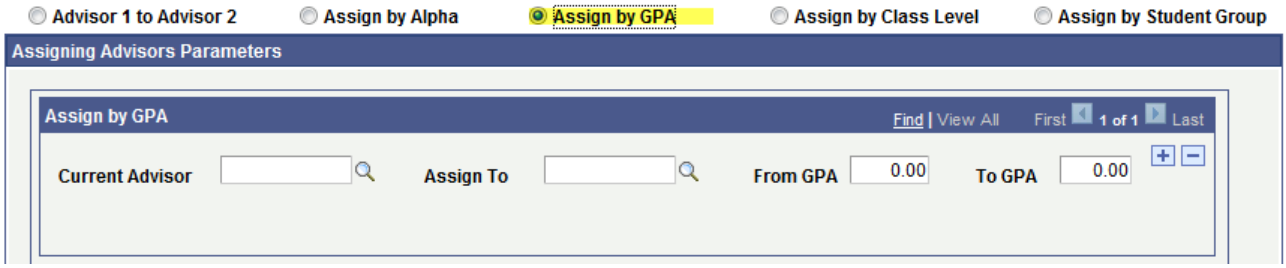
4.)

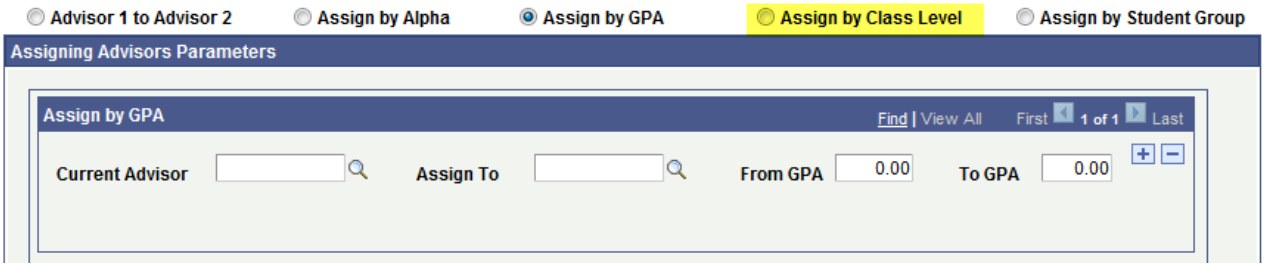

Change Assignment of Advisors
Change Assignment of Advisors
Run Control ID: MATAssignAdvisors
Report Manager
Process Monitor
Run
As of Date 08/15/2013
Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Select if assigning all students from one advisor to another
Select if assigning from one advisor to multiple advisors by alpha breakdown
Select if assigning from one advisor to one or more by GPA
Select if assigning from one advisor to one or more by Class level
Select if assigning from one advisor to another by student group
Run Process Instruction
Click on "Run" button on the top right to run process. Fill in the following parameters on "Run" process page. 1. Choose PSUNX in Server Name parameter. 2. Click on 'OK' button.

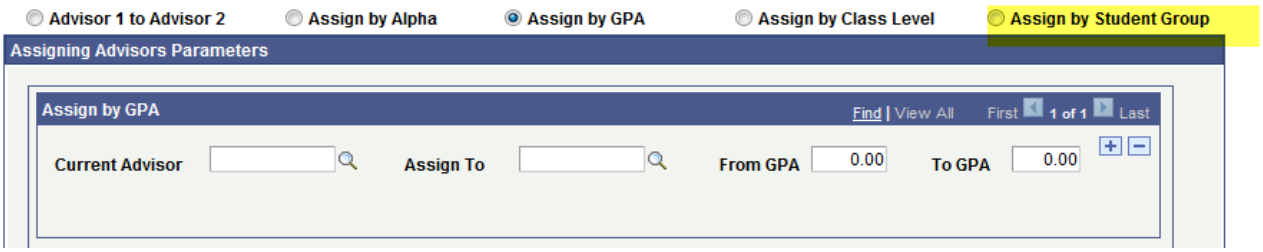
5.)


Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Assigning Advisors Parameters
Assign 1 to Advisor 2
Find | View All
First 1 of 1 Last
Current Advisor
Assign To

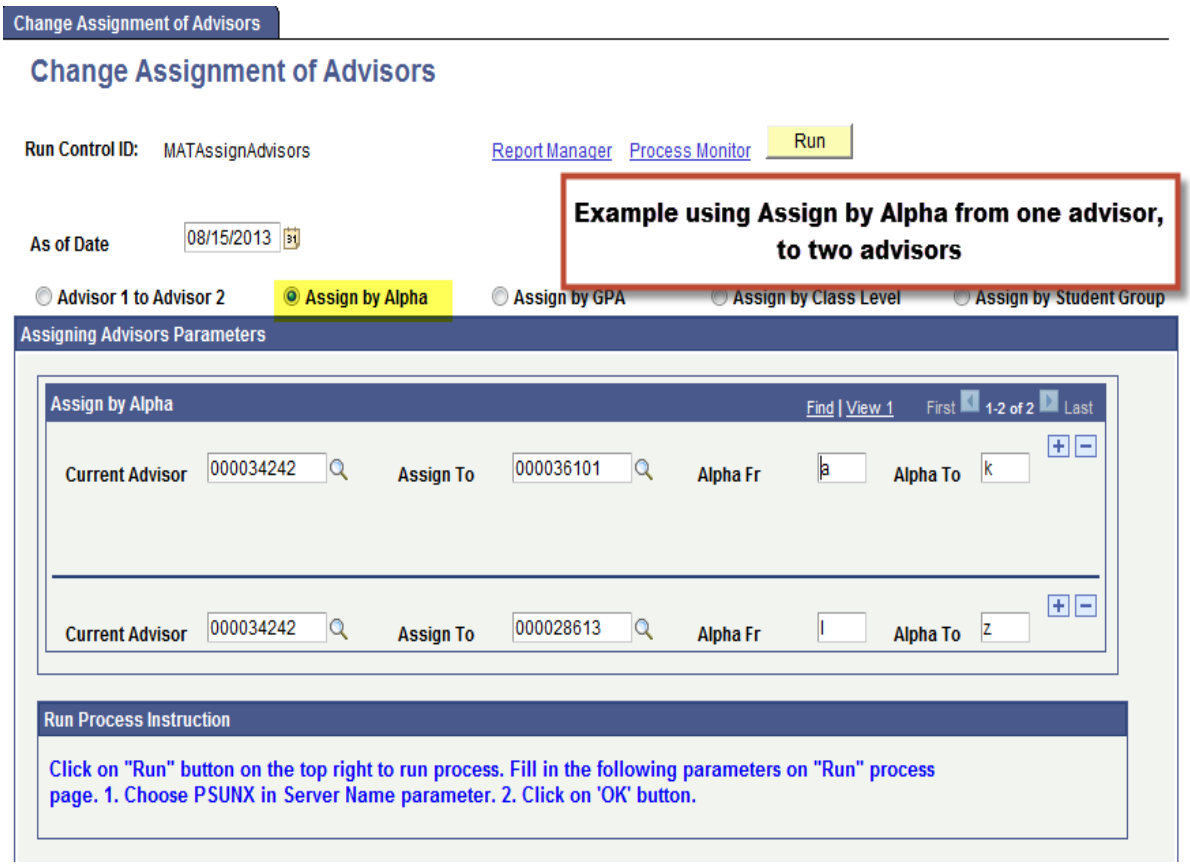

Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Assigning Advisors Parameters
Assign by Alpha
Find | View All
First 1 of 1 Last
Current Advisor
Assign To
Alpha Fr
Alpha To


Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Assigning Advisors Parameters
Assign by GPA
Find | View All
First 1 of 1 Last
Current Advisor
Assign To
From GPA 0.00
To GPA 0.00

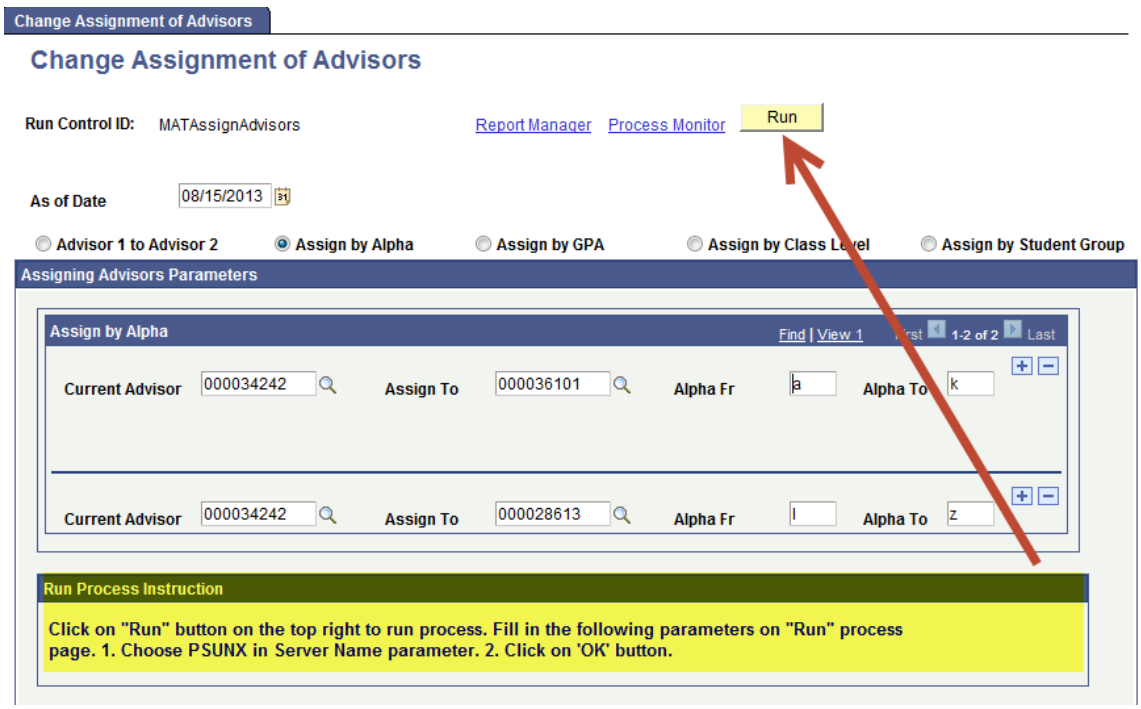

Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Assigning Advisors Parameters
Assign by GPA
Find | View All
First 1 of 1 Last
Current Advisor
Assign To
From GPA
0.00
To GPA
0.00


Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Assigning Advisors Parameters
Assign by GPA
Find | View All
First 1 of 1 Last
Current Advisor
Assign To
From GPA
0.00
To GPA
0.00

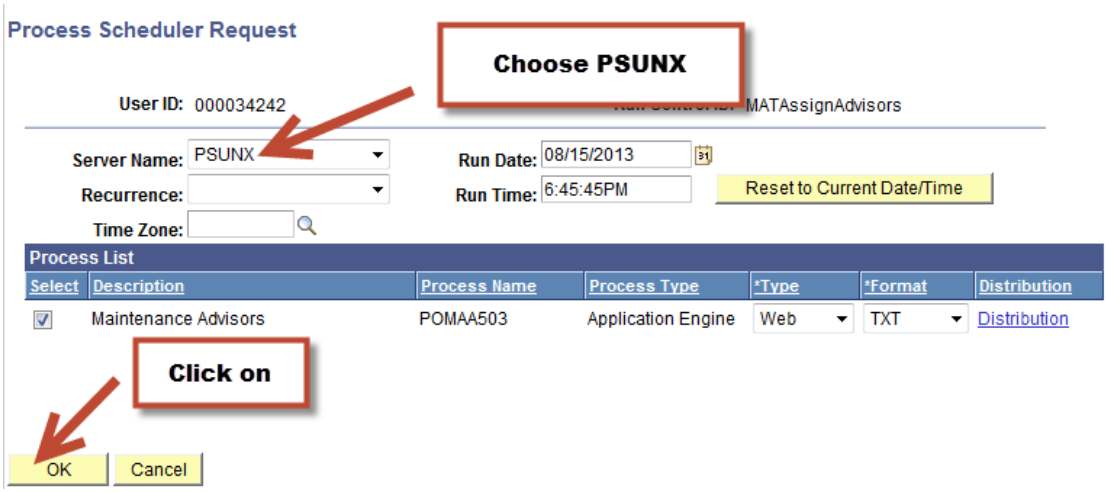
6.)


Change Assignment of Advisors
Change Assignment of Advisors
Run Control ID: MATAssignAdvisors
Report Manager
Process Monitor
Run
As of Date 08/15/2013
Example using Assign by Alpha from one advisor, to two advisors
Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Assigning Advisors Parameters
Assign by Alpha
Find | View 1
First 1-2 of 2 Last
Current Advisor 000034242
Assign To 000036101
Alpha Fr a
Alpha To k
Current Advisor 000034242
Assign To 000028613
Alpha Fr l
Alpha To z
Run Process Instruction
Click on "Run" button on the top right to run process. Fill in the following parameters on "Run" process page. 1. Choose PSUNX in Server Name parameter. 2. Click on 'OK' button.

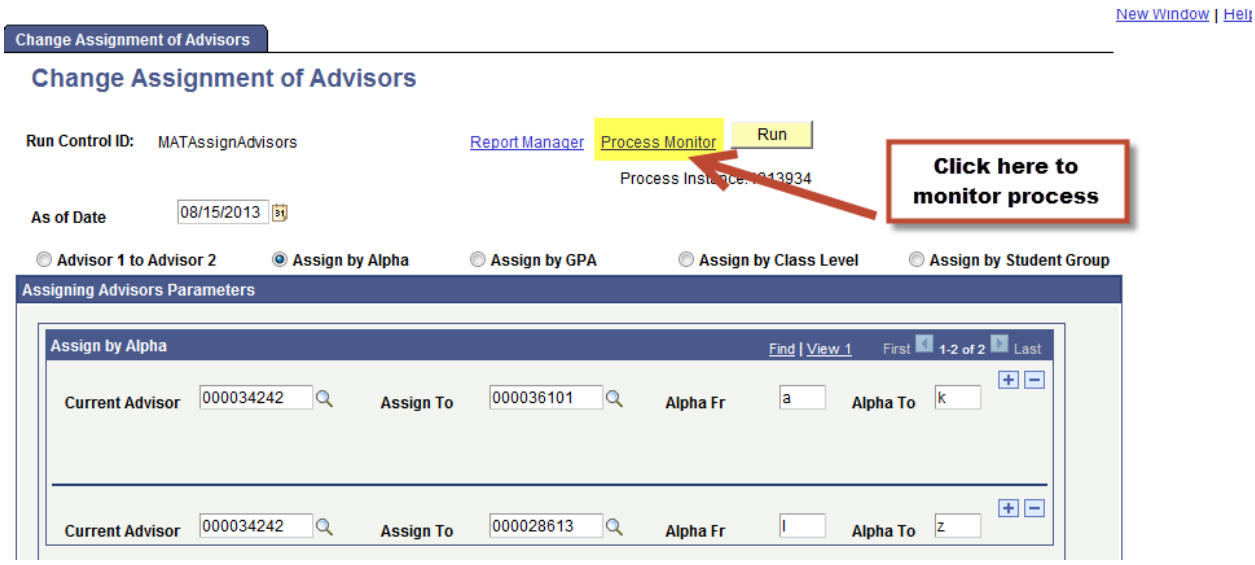
7.)


Change Assignment of Advisors
Change Assignment of Advisors
Run Control ID: MATAssignAdvisors
Report Manager
Process Monitor
Run
As of Date 08/15/2013
Advisor 1 to Advisor 2
Assign by Alpha
Assign by GPA
Assign by Class Level
Assign by Student Group
Assigning Advisors Parameters
Assign by Alpha
Find | View 1
First 1-2 of 2 Last
Current Advisor 000034242
Assign To 000036101
Alpha Fr a
Alpha To k
Current Advisor 000034242
Assign To 000028613
Alpha Fr l
Alpha To z
Run Process Instruction
Click on "Run" button on the top right to run process. Fill in the following parameters on "Run" process page. 1. Choose PSUNX in Server Name parameter. 2. Click on 'OK' button.

8.)

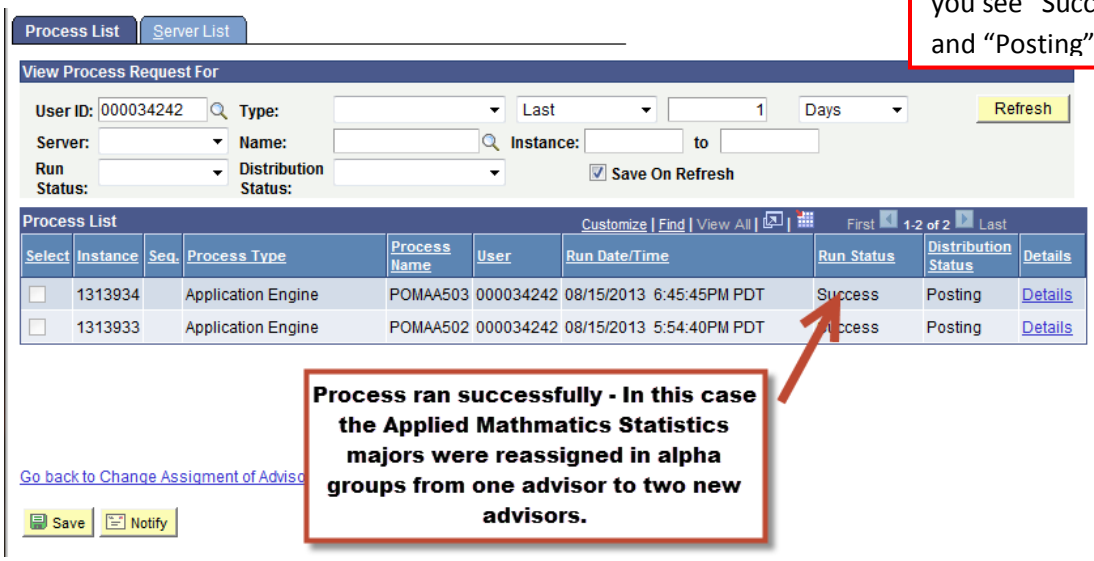

Process Scheduler Request
Choose PSUNX
User ID: 000034242
MATAssignAdvisors
Server Name: PSUNX
Run Date: 08/15/2013
Recurrence:
Run Time: 6:45:45PM
Reset to Current Date/Time
Time Zone:
Process List
Select
Description
Process Name
Process Type
*Type
*Format
Distribution
Maintenance Advisors
POMAA503
Application Engine
Web
TXT
Distribution
Click on
OK
Cancel

9.)



10.)

Select refresh to complete process until you see "Success" in the Run Status field and "Posting" in the Distribution Status

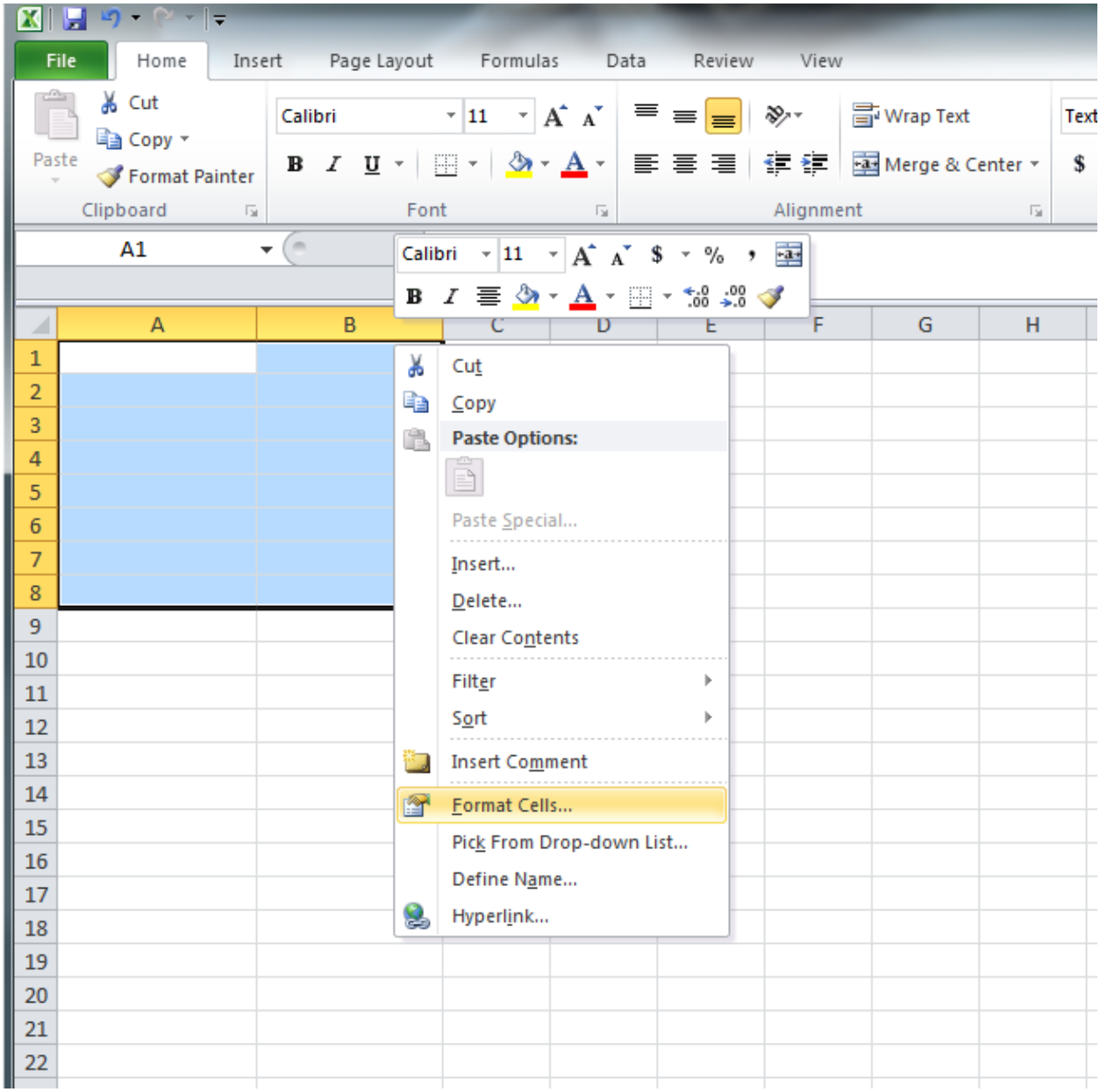


Assign Advisors by Spreadsheet

1.) First prepare an excel file with all advisor Bronco IDs in column A and student Bronco IDs in column B.

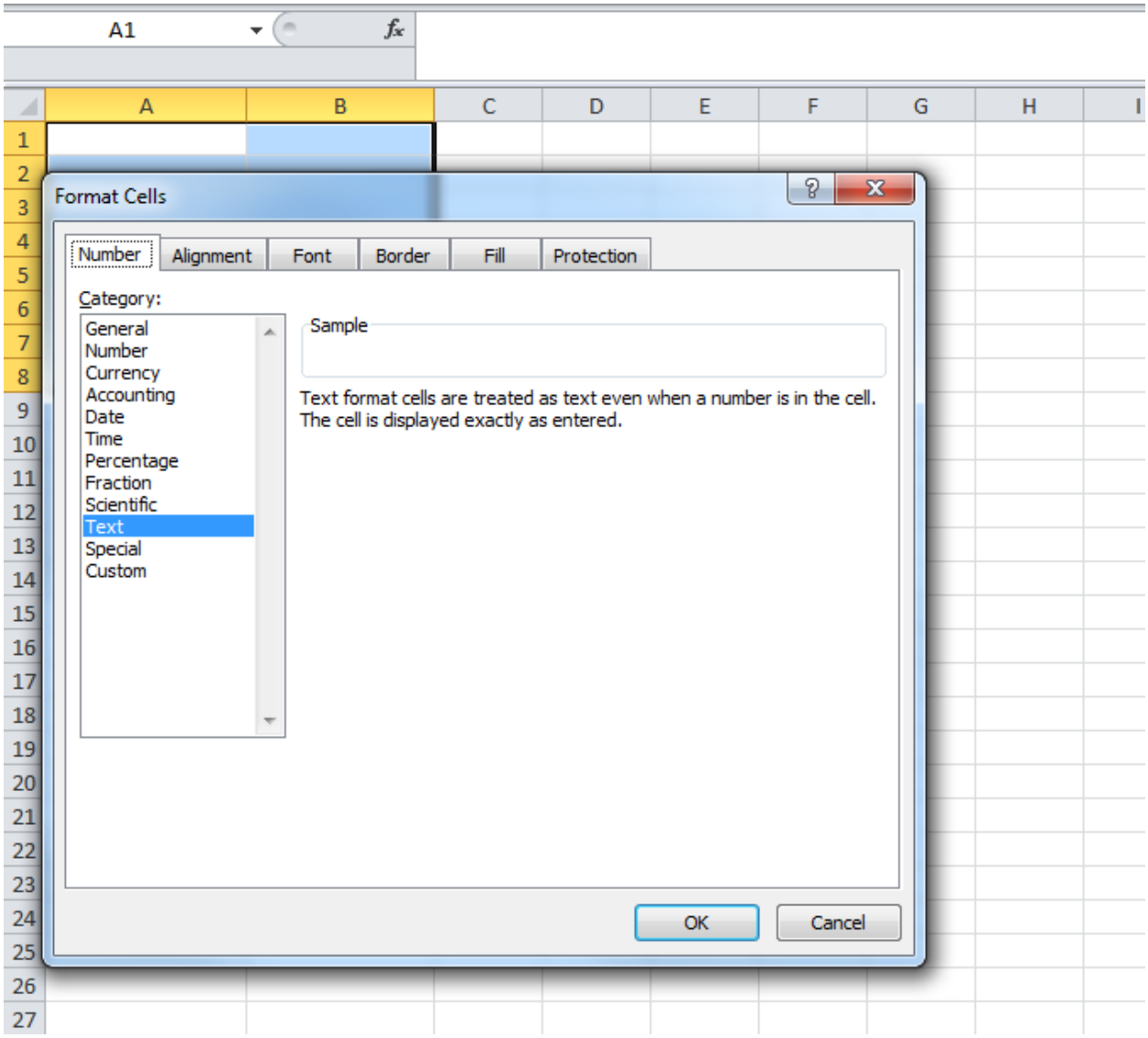
2.) Columns A and B need to be set in TEXT format, otherwise the leading zeros (000) will not be displayed.

a.) Highlight columns A and B, right click mouse and select Format Cells



After selecting Format Cells, choose Text from the category under Number tab.

Click OK Columns A and B are now in Text format



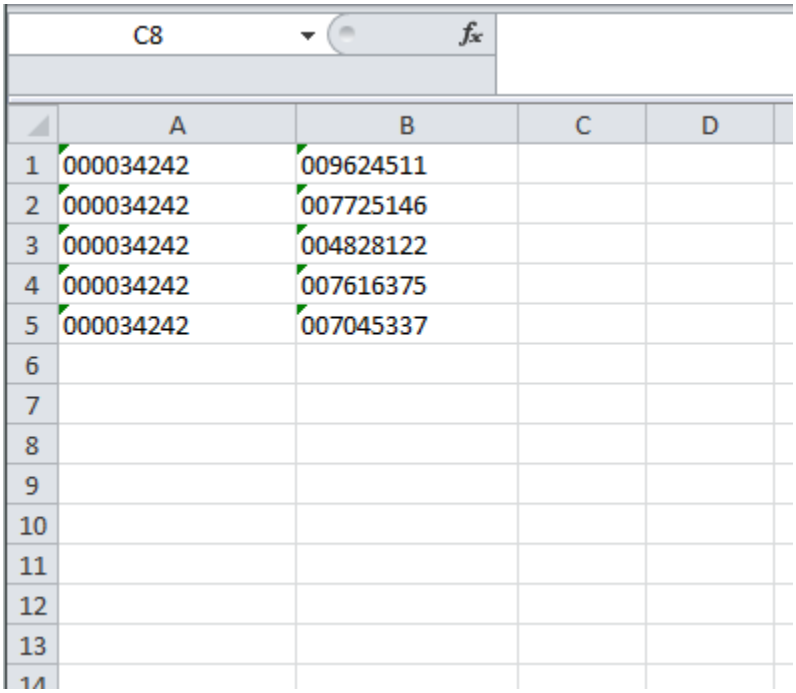
3.) Enter Advisor and Student IDs.

a.) Enter the 9 digit BroncoNumber for Advisors in column A. Match each advisor ID to a student advisee ID for the assignment process to run correctly.

b.) Enter the 9 digit BroncoNumber for Students in column B.

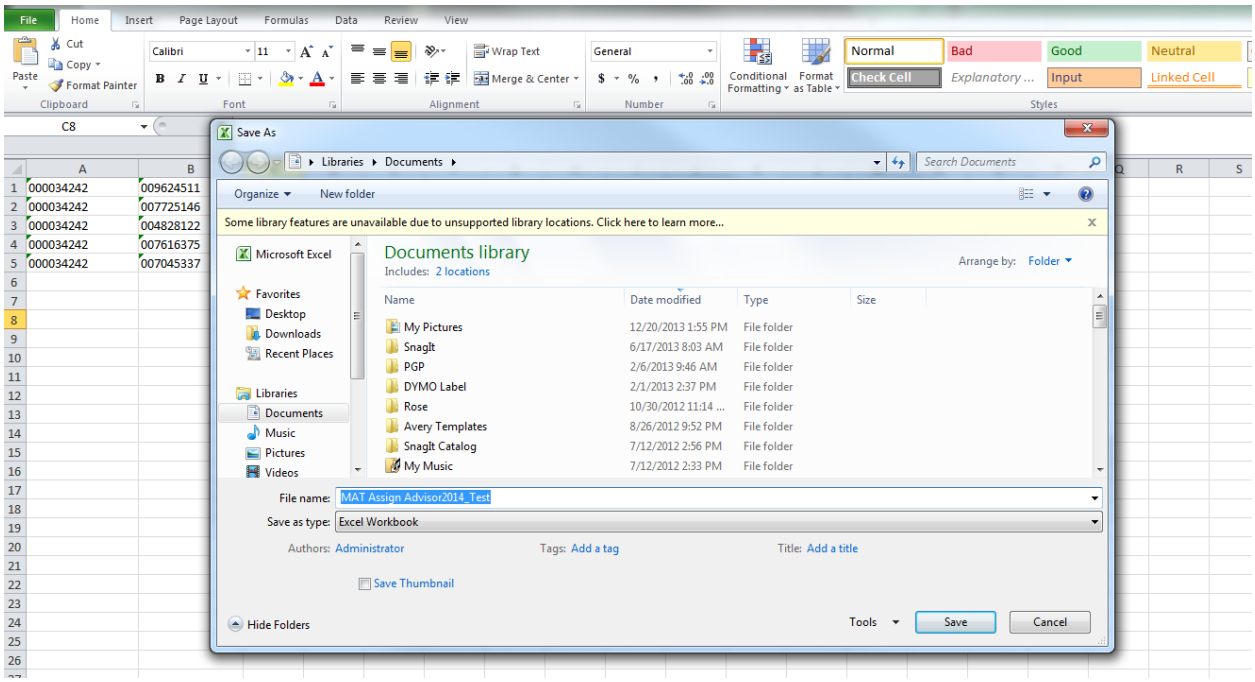
c.) Note that there is no heading for either column A or B.

4.)Save as an Excel File- Begin the filename with your department abbreviation, for example Math would be MAT. Follow whatever naming convention makes sense for your business process after the department abbreviation.

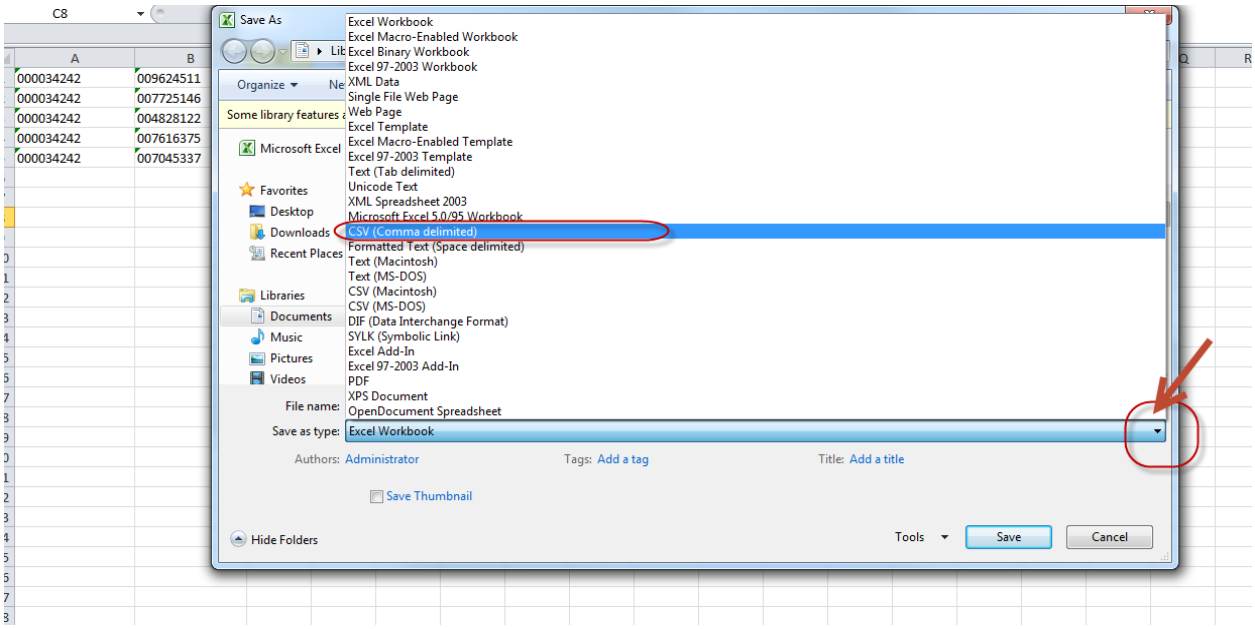


a.) Save the file in CSV format

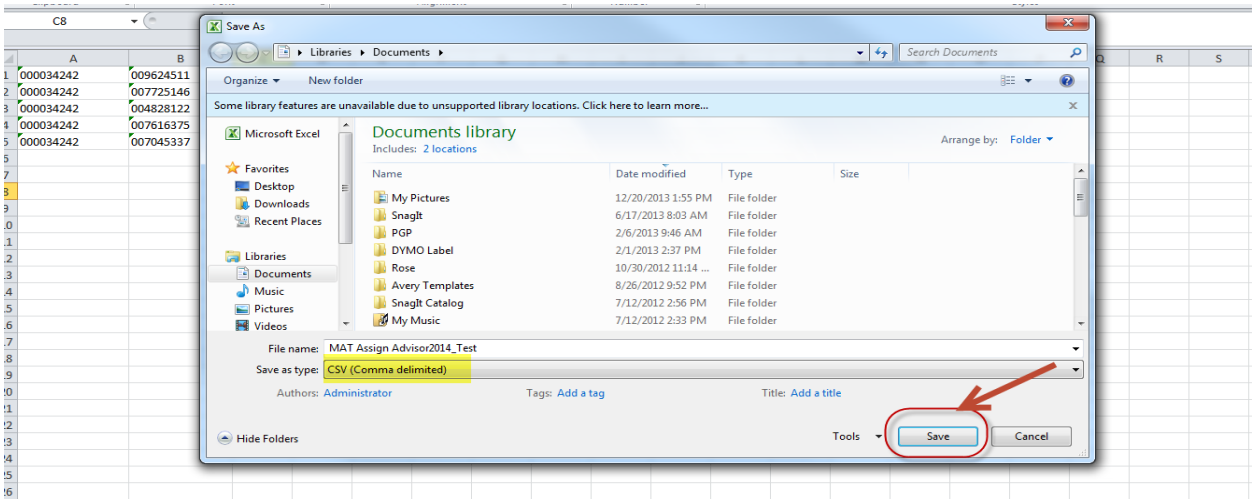
In the Excel file you have created in step a, click on File and Save As
It should look like the example below



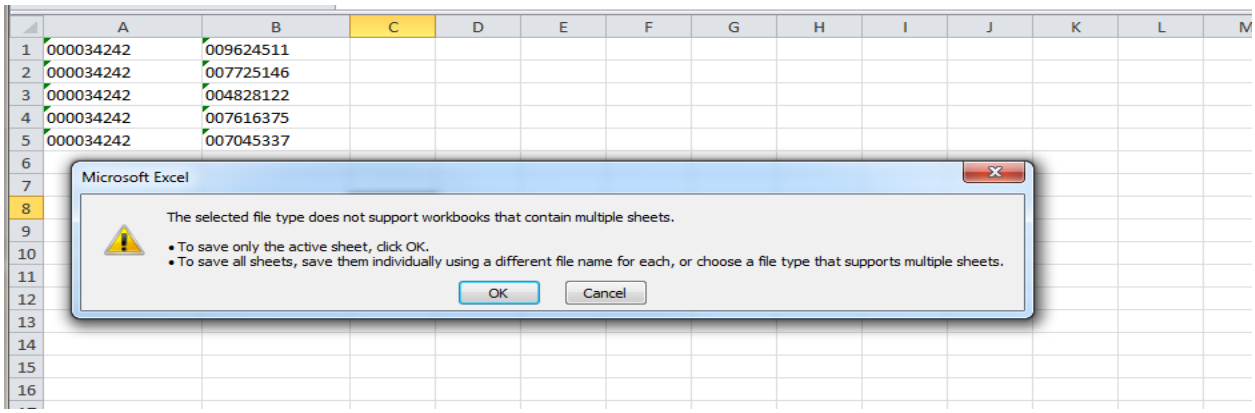
On the “Save as type” field, click on the down arrow on the far right hand side of the screen



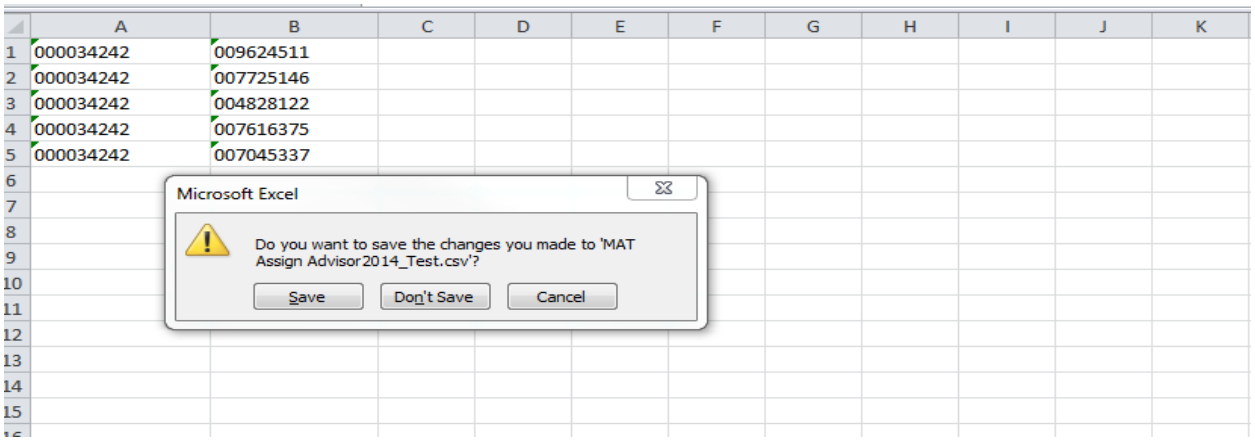
Make certain the “Save as type” is CSV (Comma delimited) as highlighted below.
Select Save



You will likely get a least two Microsoft messages, just click OK or YES



When you attempt to close the file, a message will pop up asking if you want to save the changes you made. Select Save

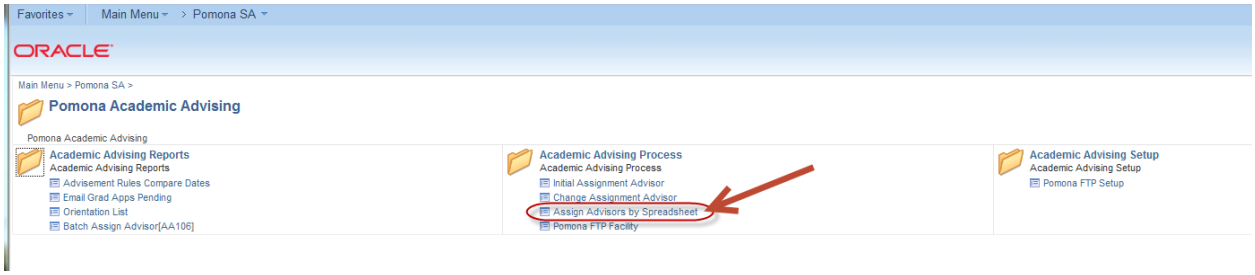


If additional messages pop up, click Save until you are out of Excel

4.) Uploading the CSV file in PeopleSoft

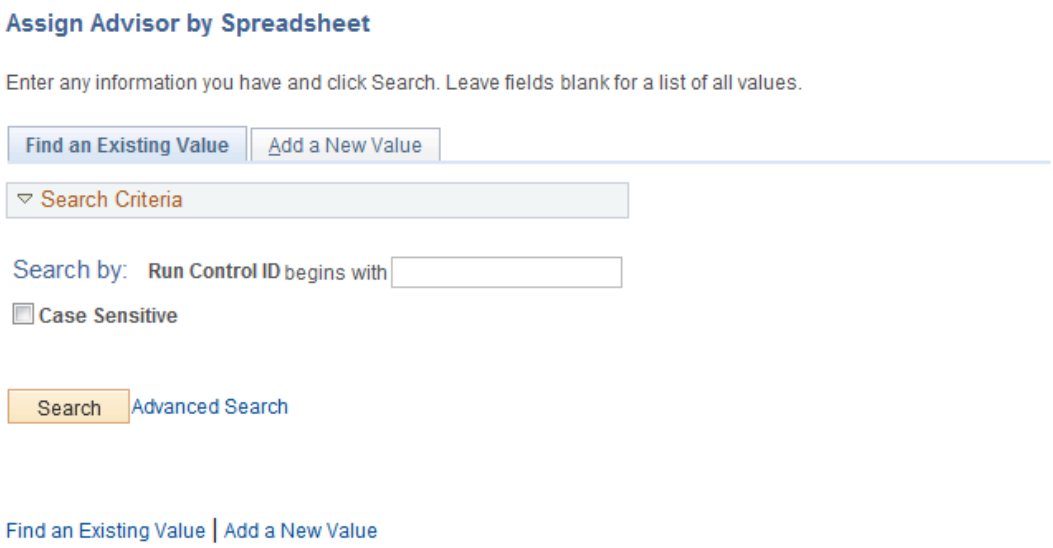
Begin by logging into PeopleSoft. Select Pomona SA>Pomona Academic Advising>Academic Advising Process>Assign Advisors by Spreadsheet

Below is an example of the screen page you should see. Click on "Assign Advisors by Spreadsheet"

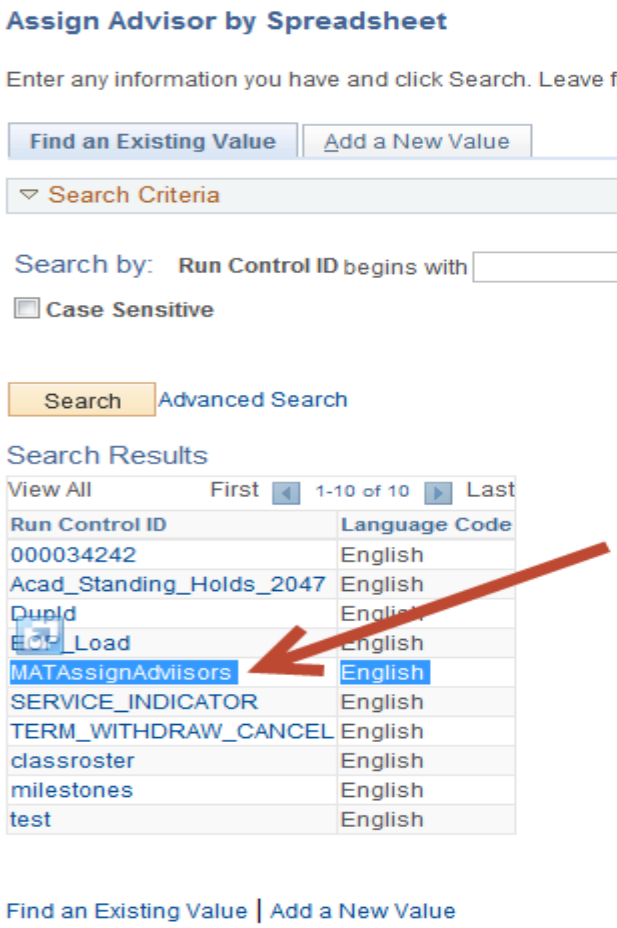


After selecting Assign Advisor by Spreadsheet, the Run Control Page appears. If you have not created a value for your department, please refer to the steps to create a run control beginning on Page 7 of this document.

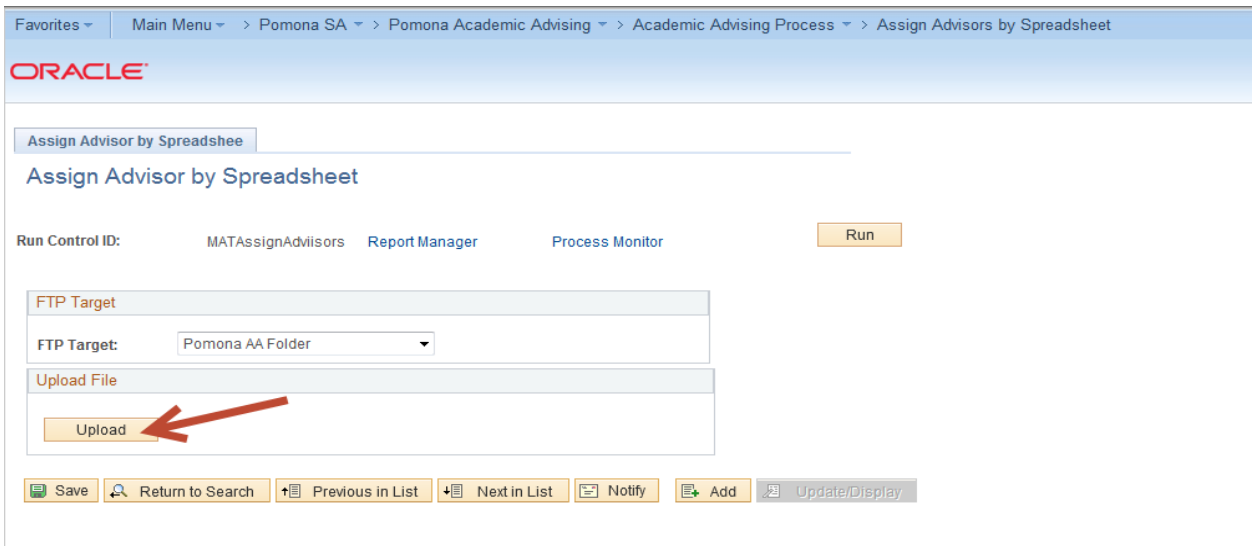
If you have already created a Run Control, then click Search



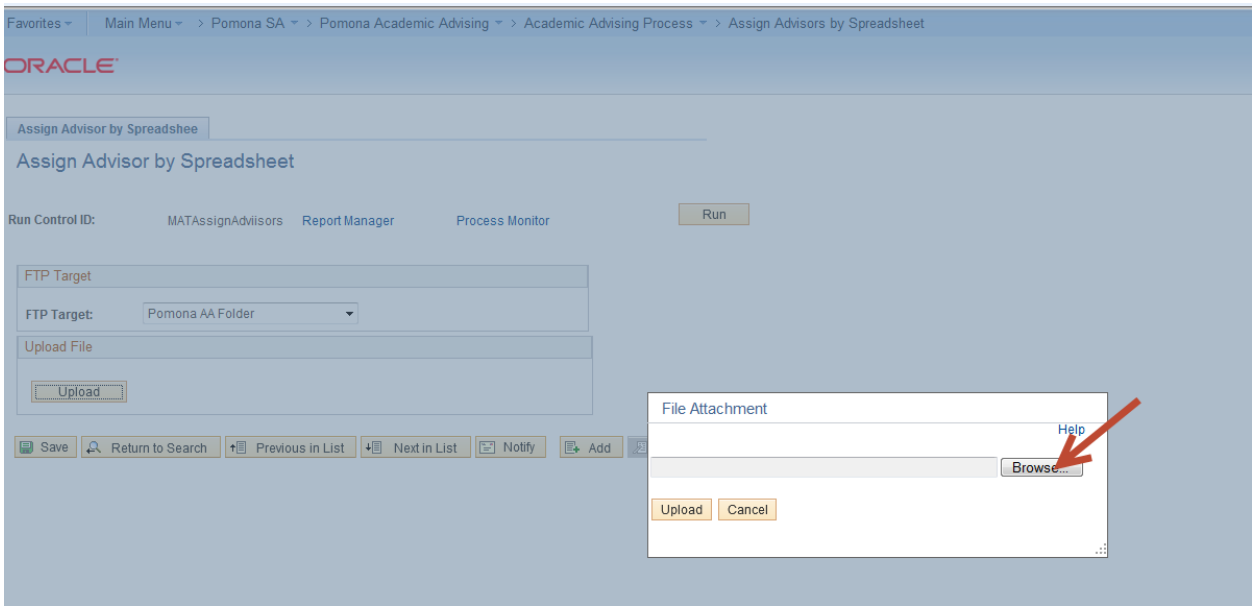
Click on the appropriate Run Control ID, in this example it is MATAssignAdvisors



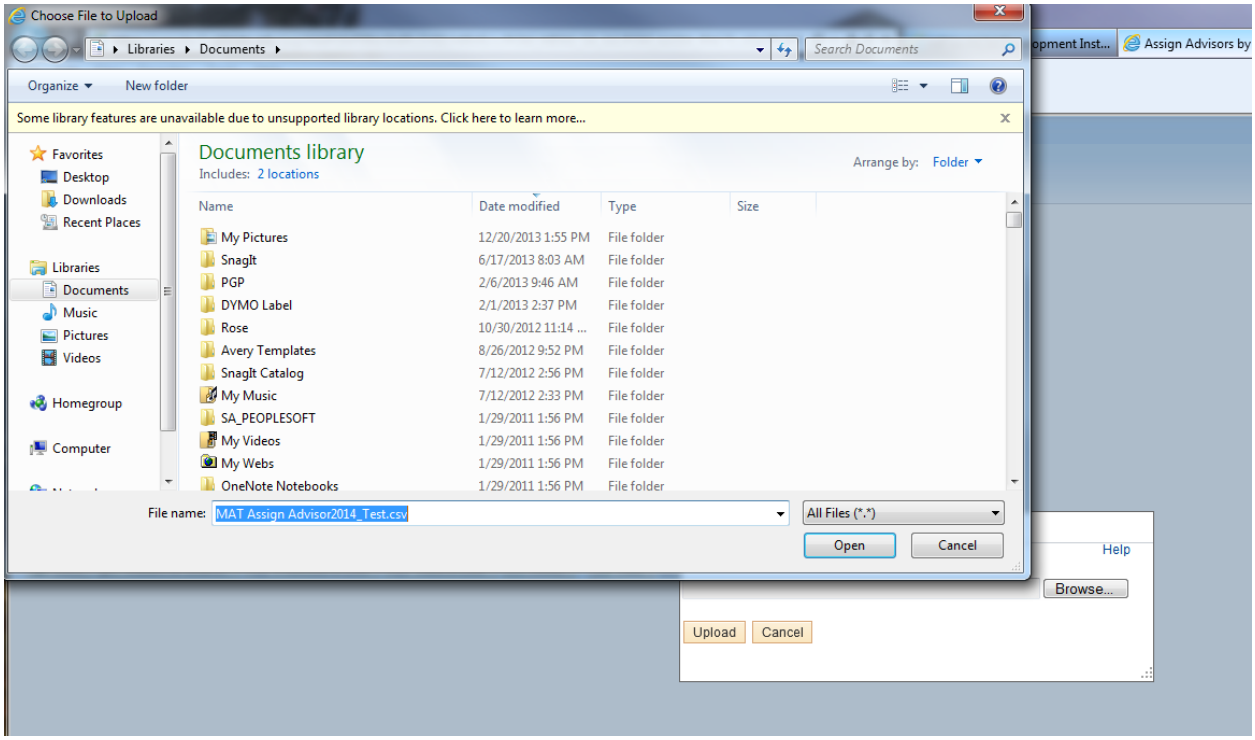
Make certain the FTP Target field shows Pomona AA Folder and then select the Upload button.



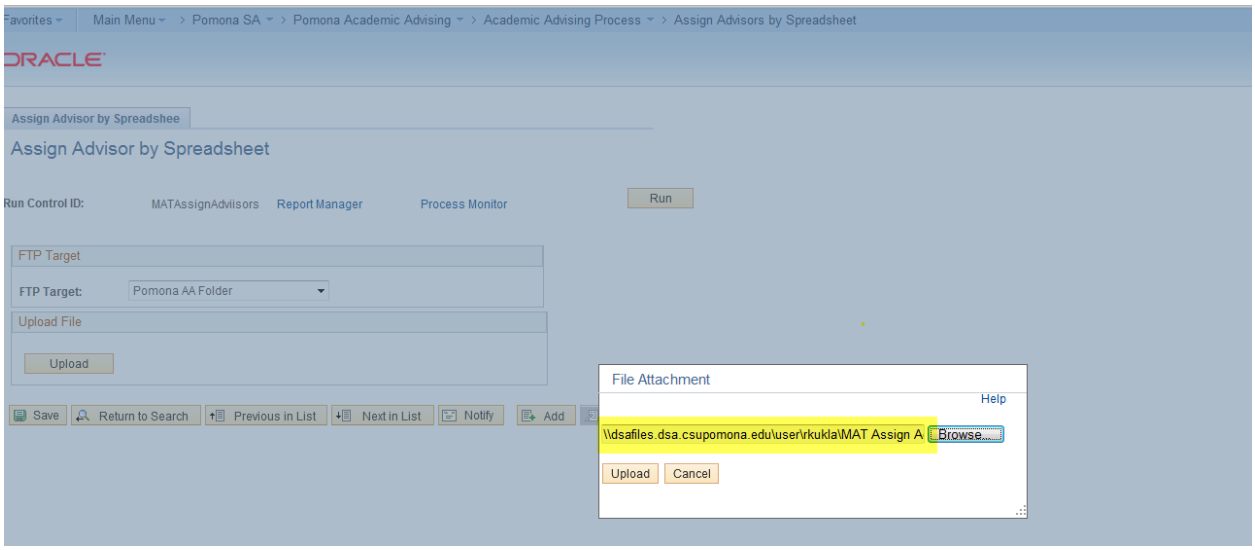
After selecting Upload, click on the Browse button as noted below.



Find the CSV version of you Excel Spreadsheet and click on the Open button

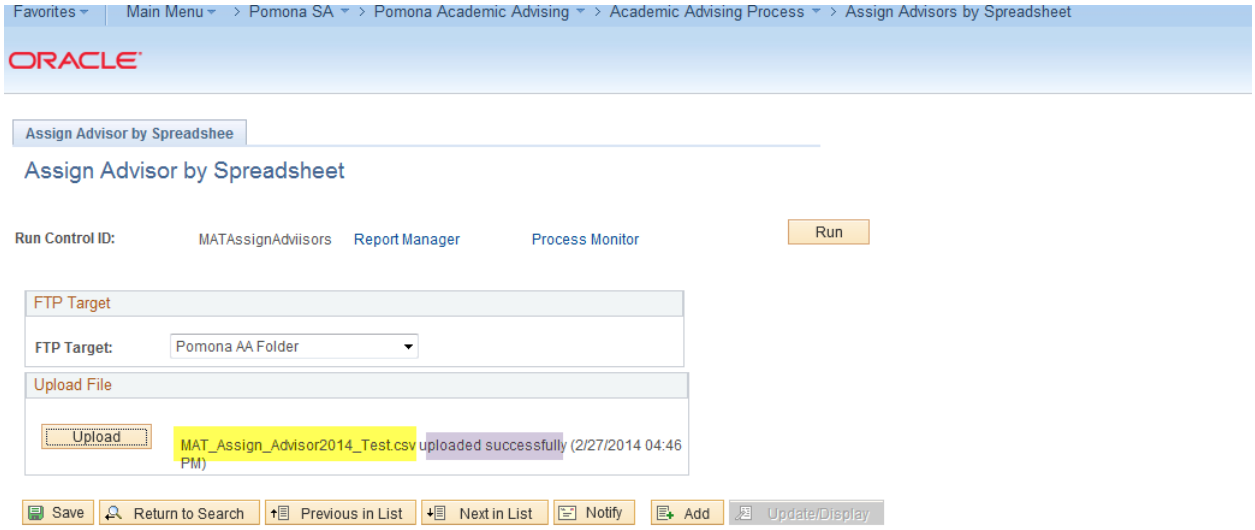


The file will be inserted into the File Attachment as highlighted below. Select Upload



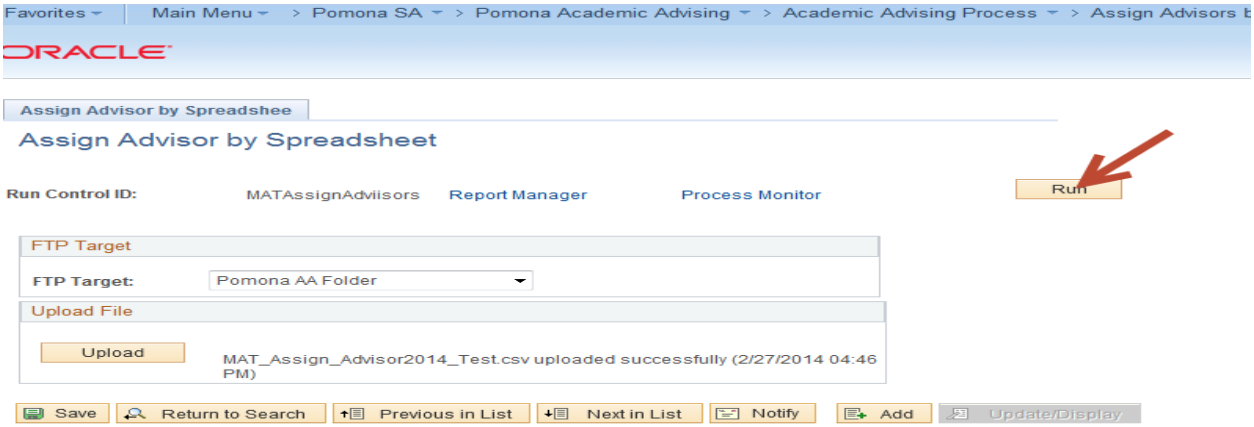
In the space next to the upload button, check to make certain that the correct file uploaded as highlighted in yellow below.

Also confirm that the file was uploaded successfully as highlighted below in purple

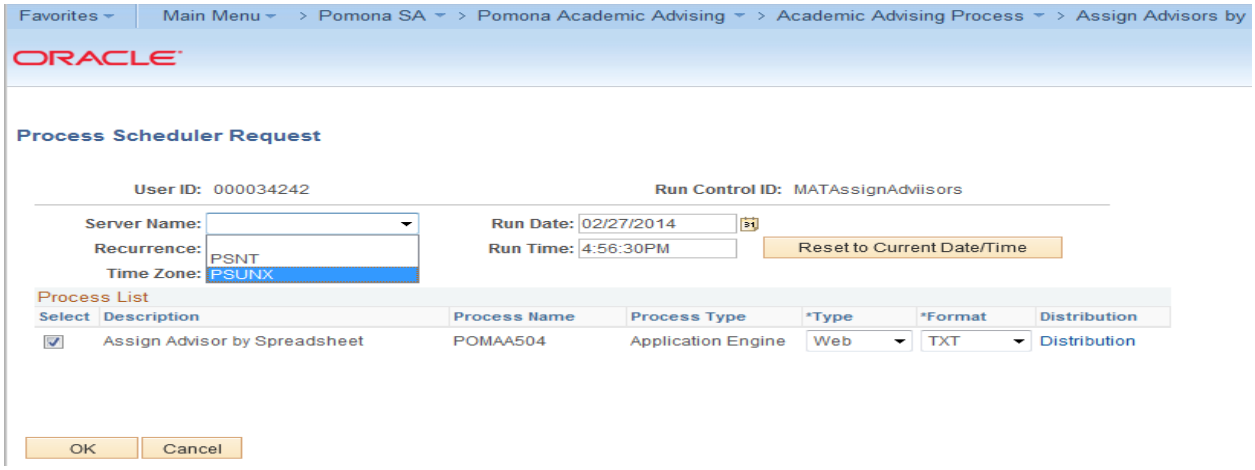


5.) Run the process to assign advisors using the CSV file

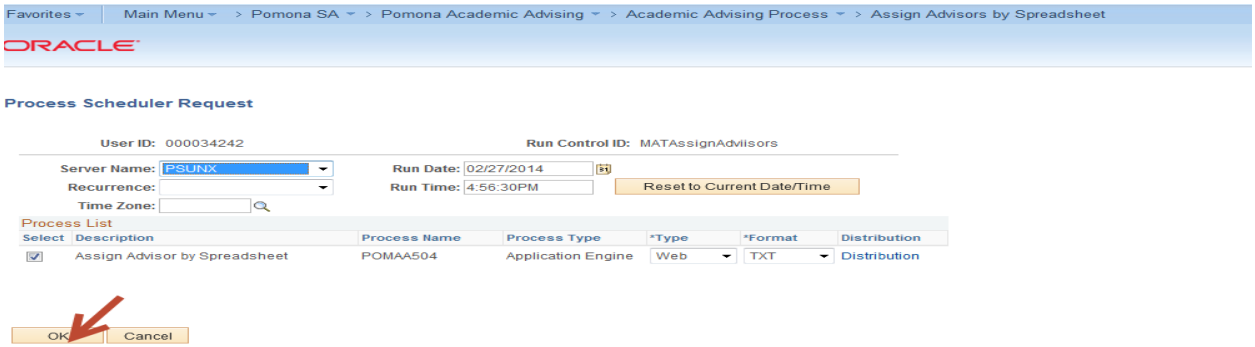
Click on the Run button as noted with the red arrow below.



You must select a server by selecting the down arrow and clicking on PSUNX as highlighted in blue below.

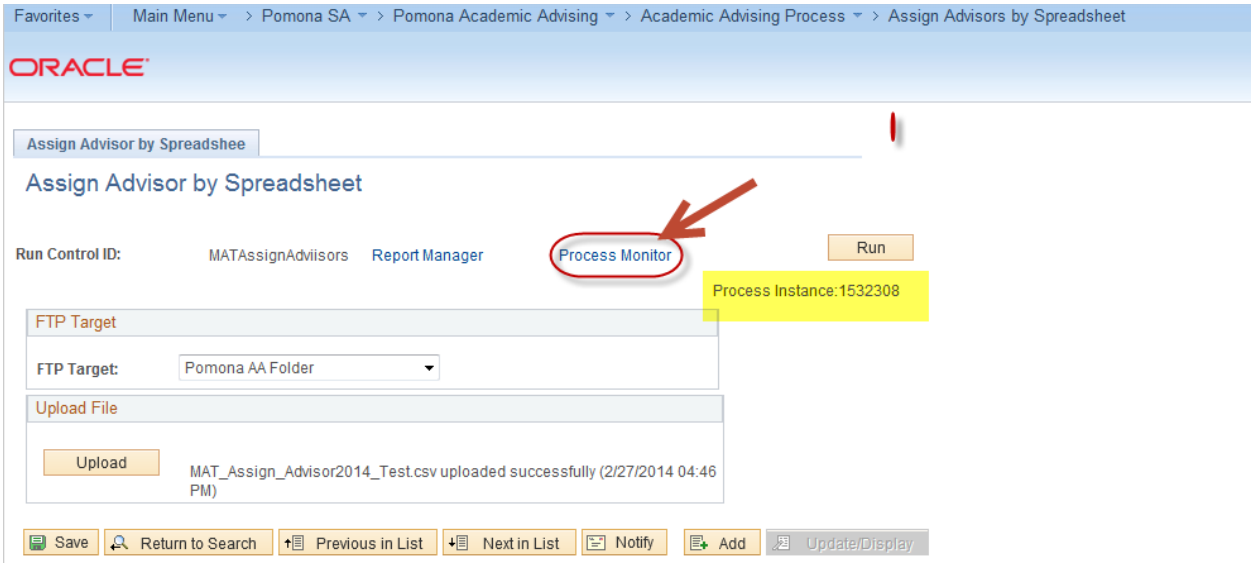


After selecting the PSUNX server, click on the OK button

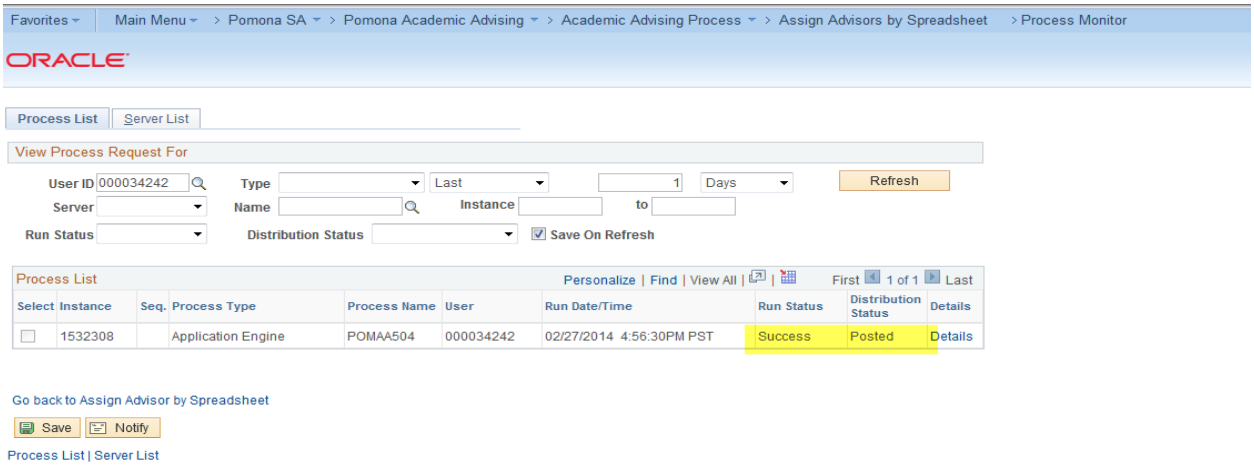


After selecting the OK button, you will return to the Run Control page. Notice as highlighted in yellow below, the process instance number is now listed on this page.

To track the progress of the assigning process, click on Process Monitor.



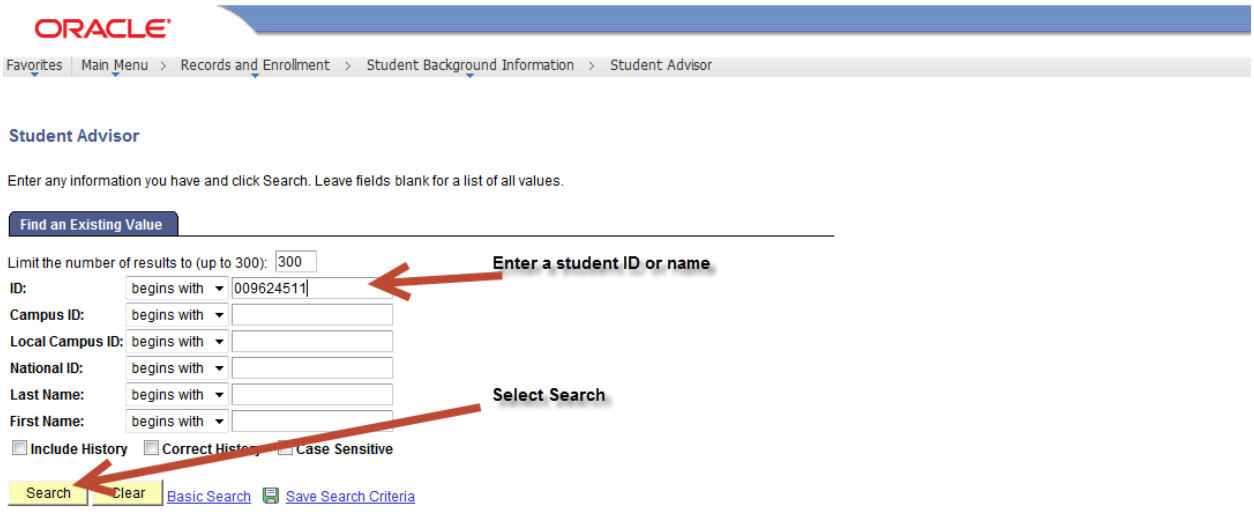
The Run Status will ultimately indicate Success. You may see the process in Queue or Processing or Success. Hopefully you will never see a failed message.



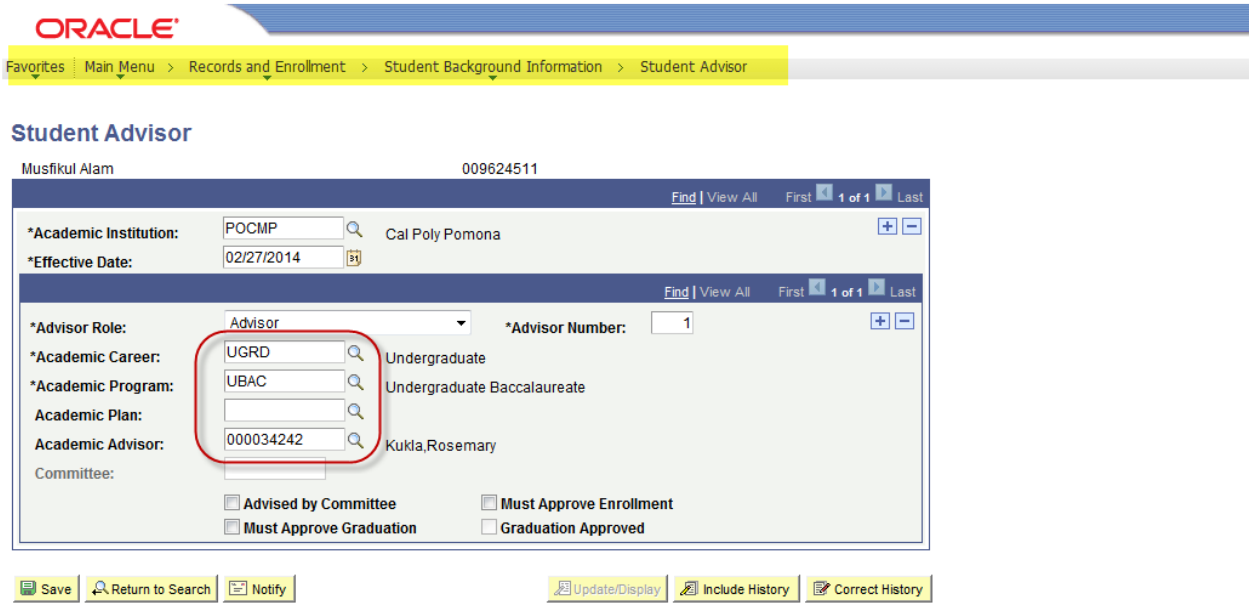
Note: To be eligible to have an advisee assigned, a person must have the Advisor box checked and at least the Academic Career identified in the Instructor/Advisor Table. If a person is not available to assign as an advisor contact the Academic Programs Office.

Student Advisor Assignment – one student at a time

Begin by going to Student Advisor (Records and Enrollment>Student Background Information> Student Advisor) – at the search page enter a student ID or name and select Search.

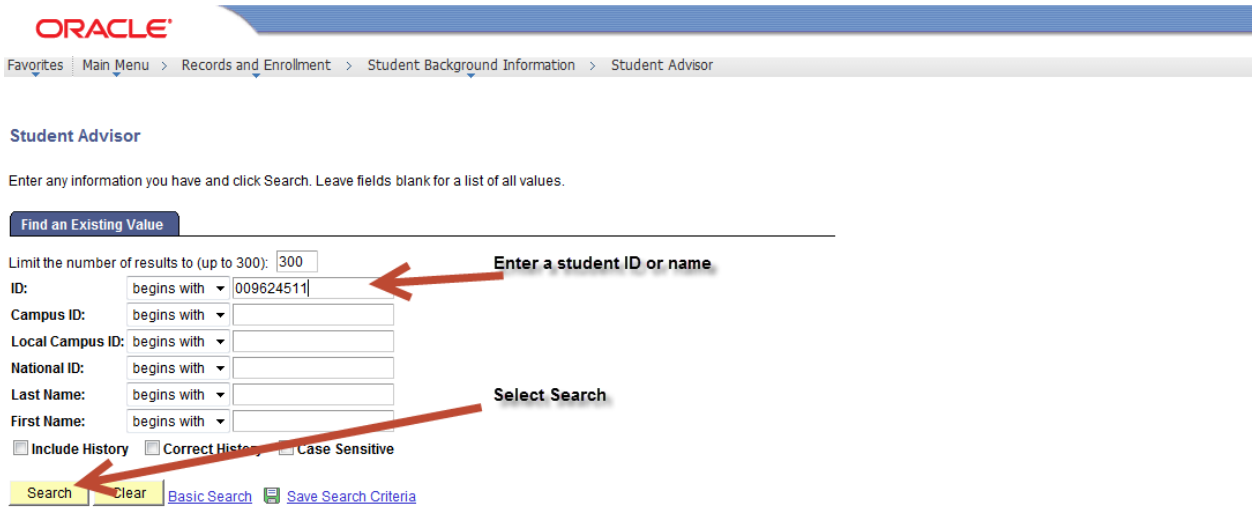


Enter the Academic Career and Program. Enter the Academic Advisor ID and Save.



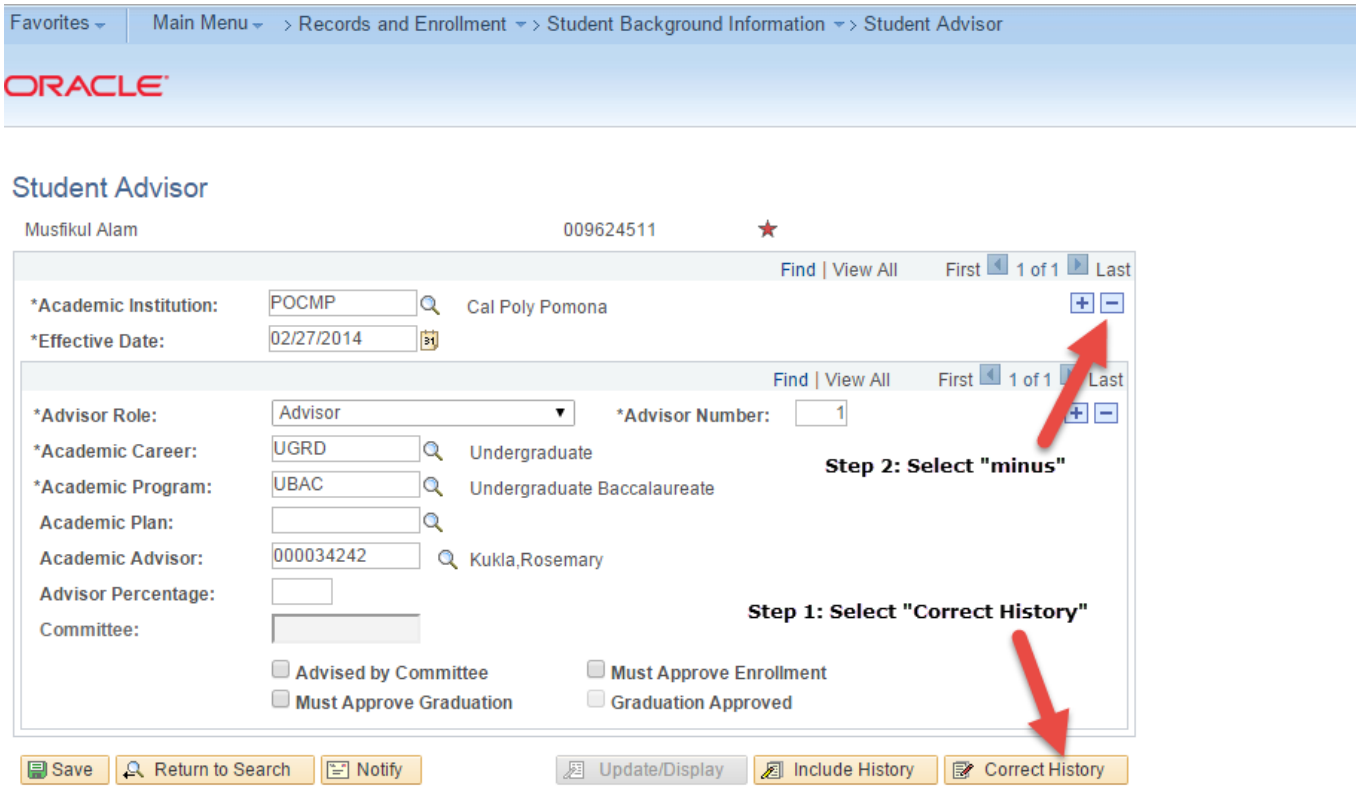
Remove Student Advisor – one student at a time

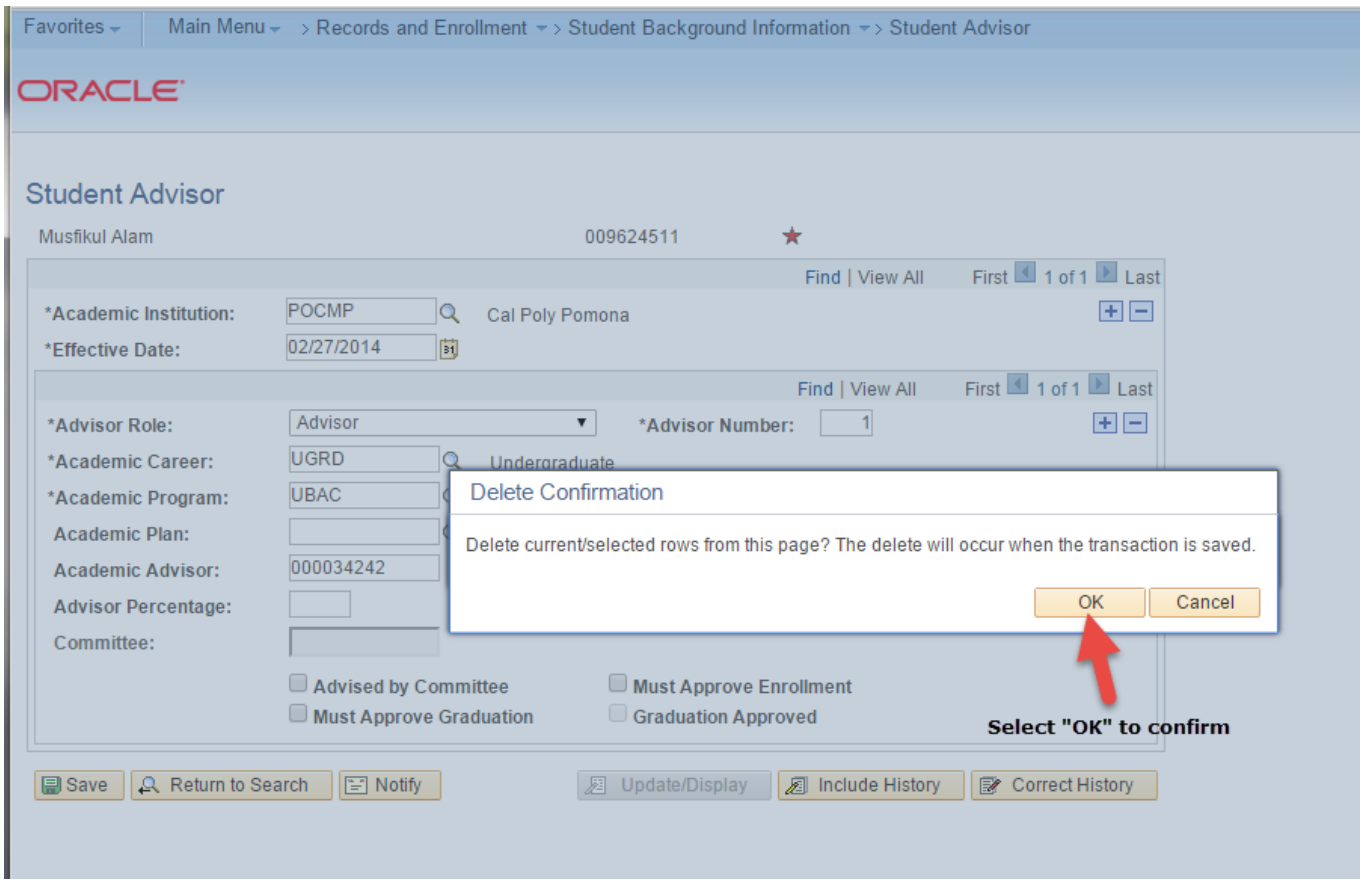
Begin by going to Student Advisor (Records and Enrollment>Student Background Information> Student Advisor) – at the search page enter a student ID or name and select Search.

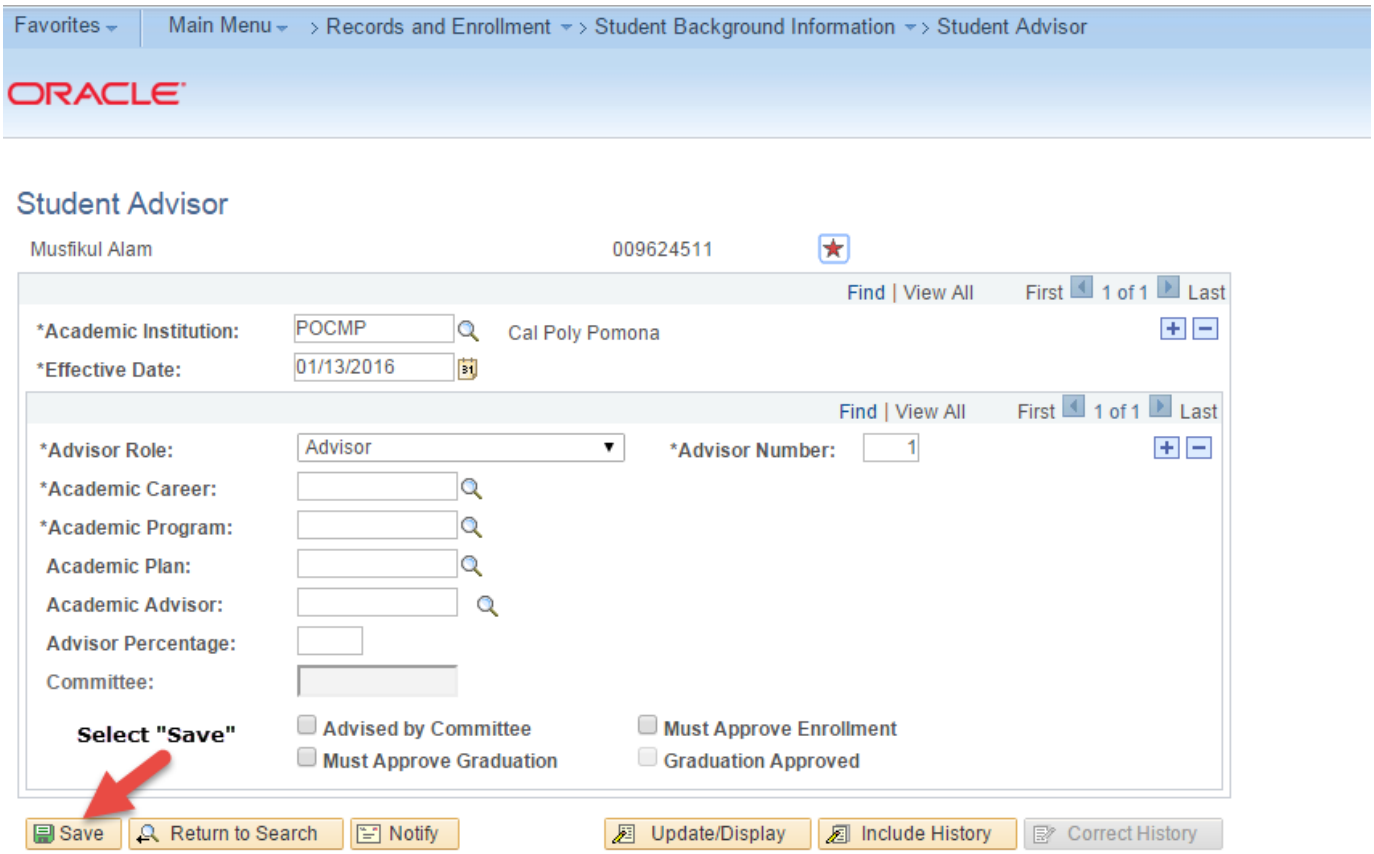


1.)The student has only one advisor assigned

Follow the steps shown in the screens below to remove the advisor from the student. Remember to save the change.

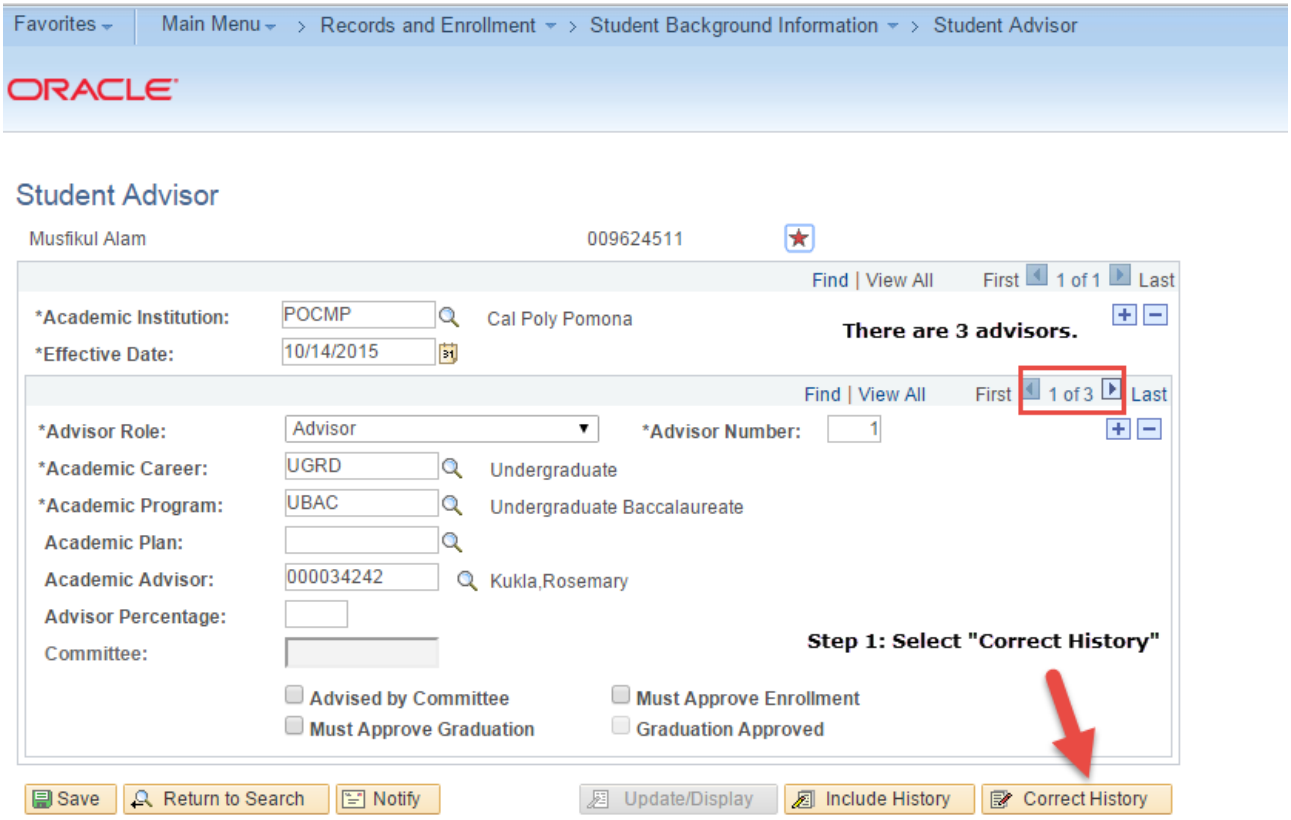

Favorites
Main Menu
Records and Enrollment
Student Background Information
Student Advisor
ORACLE
Student Advisor
Musfikul Alam
009624511
Find | View All
First 1 of 1 Last
*Academic Institution:
POCMP
Cal Poly Pomona
*Effective Date:
02/27/2014
Find | View All
First 1 of 1 Last
*Advisor Role:
Advisor
*Advisor Number:
1
*Academic Career:
UGRD
Undergraduate
*Academic Program:
UBAC
Undergraduate Baccalaureate
Academic Plan:
Academic Advisor:
000034242
Kukla,Rosemary
Advisor Percentage:
Committee:
Step 2: Select "minus"
Step 1: Select "Correct History"
Advised by Committee
Must Approve Enrollment
Must Approve Graduation
Graduation Approved
Save
Return to Search
Notify
Update/Display
Include History
Correct History

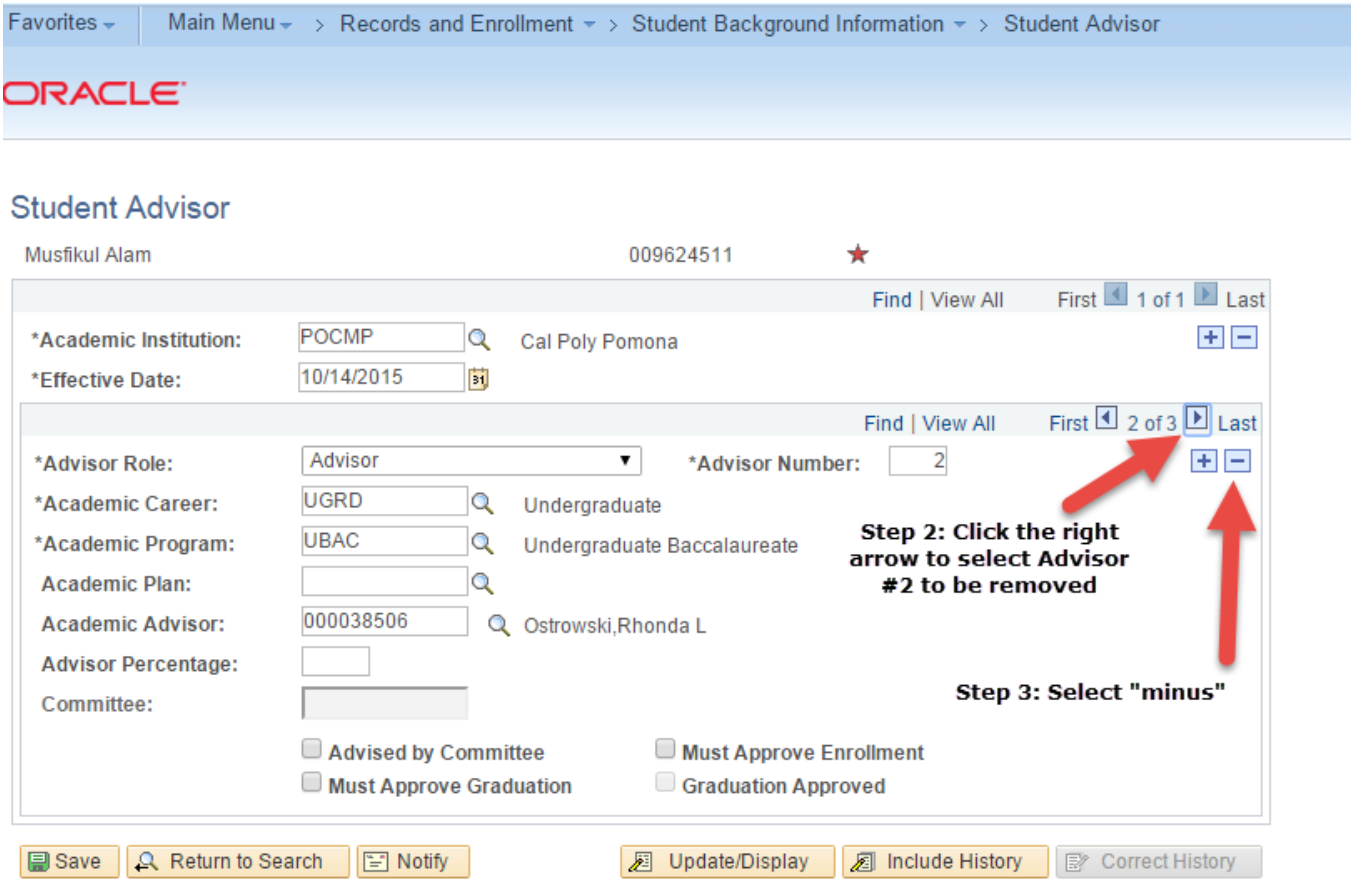

Favorites
Main Menu
Records and Enrollment
Student Background Information
Student Advisor
ORACLE
Student Advisor
Musfikul Alam
009624511
Find | View All
First 1 of 1 Last
*Academic Institution:
POCMP
Cal Poly Pomona
*Effective Date:
02/27/2014
Find | View All
First 1 of 1 Last
*Advisor Role:
Advisor
*Advisor Number:
1
*Academic Career:
UGRD
Undergraduate
*Academic Program:
UBAC
Academic Plan:
Academic Advisor:
000034242
Advisor Percentage:
Committee:
Delete Confirmation
Delete current/selected rows from this page? The delete will occur when the transaction is saved.
OK
Cancel
Select "OK" to confirm
Advised by Committee
Must Approve Enrollment
Must Approve Graduation
Graduation Approved
Save
Return to Search
Notify
Update/Display
Include History
Correct History

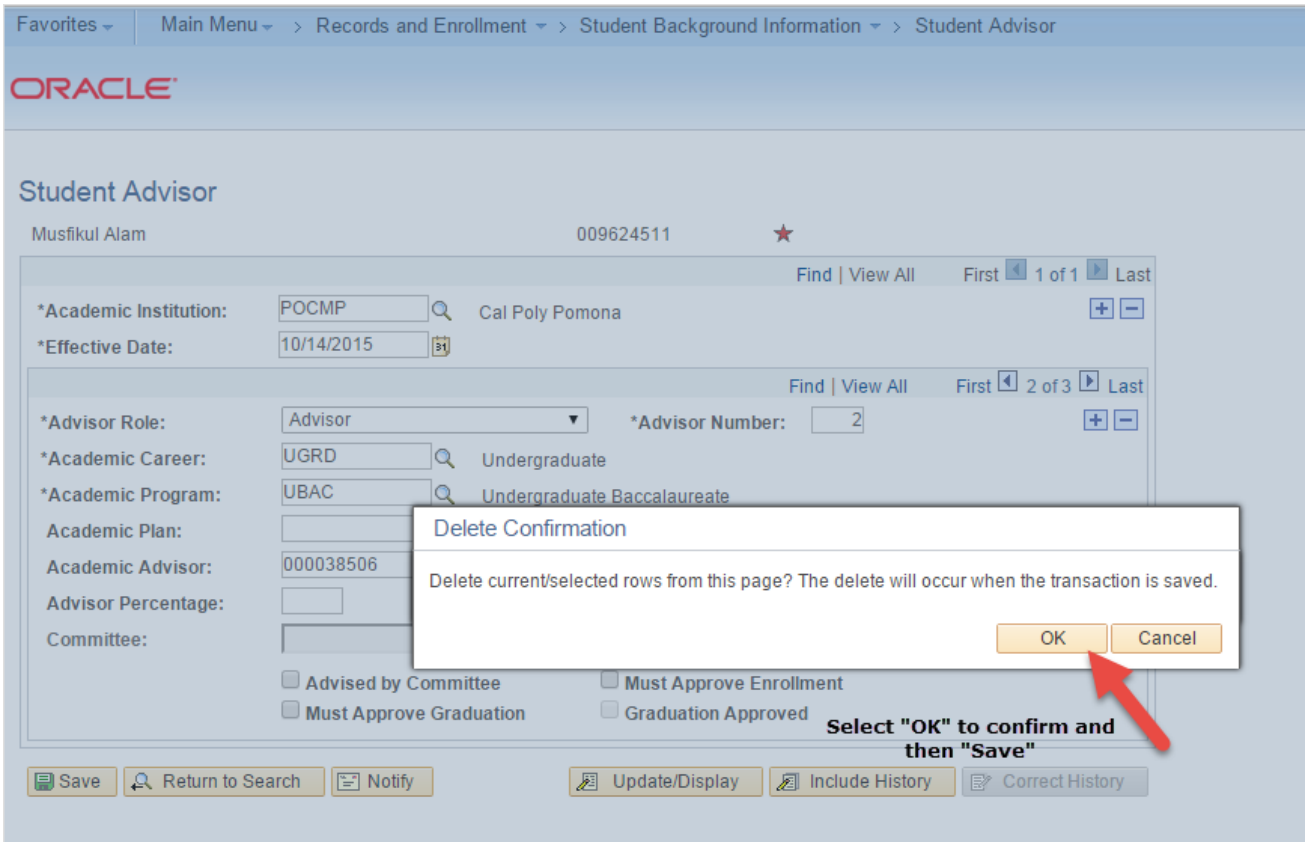


2.) The student has multiple advisors assigned and one of the advisors will be removed

Follow the steps shown in the screens below to remove the advisor from the student. Remember to save the change.

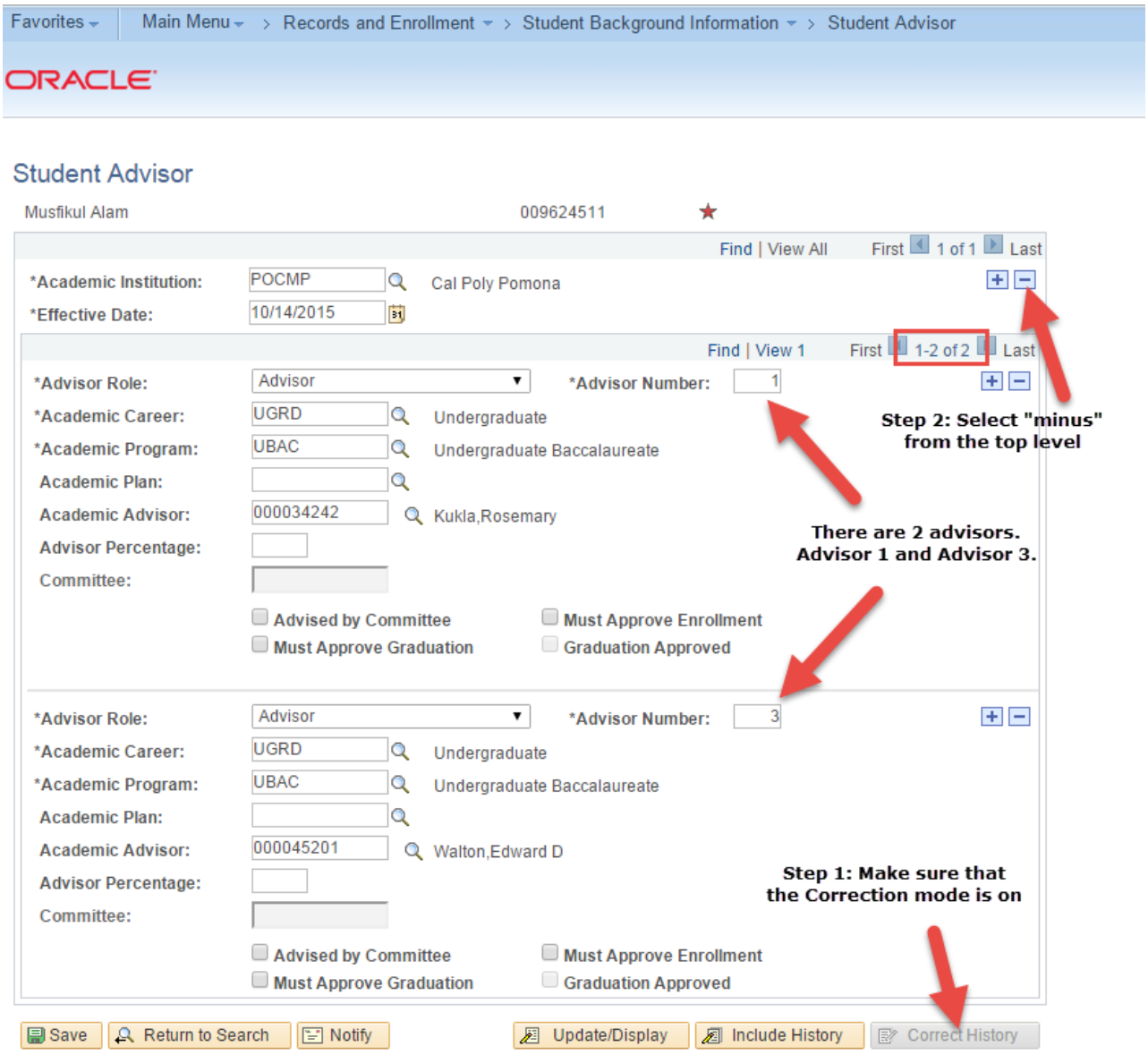

Favorites
Main Menu
Records and Enrollment
Student Background Information
Student Advisor
ORACLE
Student Advisor
Musfikul Alam
009624511
Find | View All
First 1 of 1 Last
*Academic Institution:
POCMP
Cal Poly Pomona
*Effective Date:
10/14/2015
There are 3 advisors.
Find | View All
First 1 of 3 Last
*Advisor Role:
Advisor
*Advisor Number:
1
*Academic Career:
UGRD
Undergraduate
*Academic Program:
UBAC
Undergraduate Baccalaureate
Academic Plan:
Academic Advisor:
000034242
Kukla,Rosemary
Advisor Percentage:
Committee:
Step 1: Select "Correct History"
Advised by Committee
Must Approve Enrollment
Must Approve Graduation
Graduation Approved
Save
Return to Search
Notify
Update/Display
Include History
Correct History

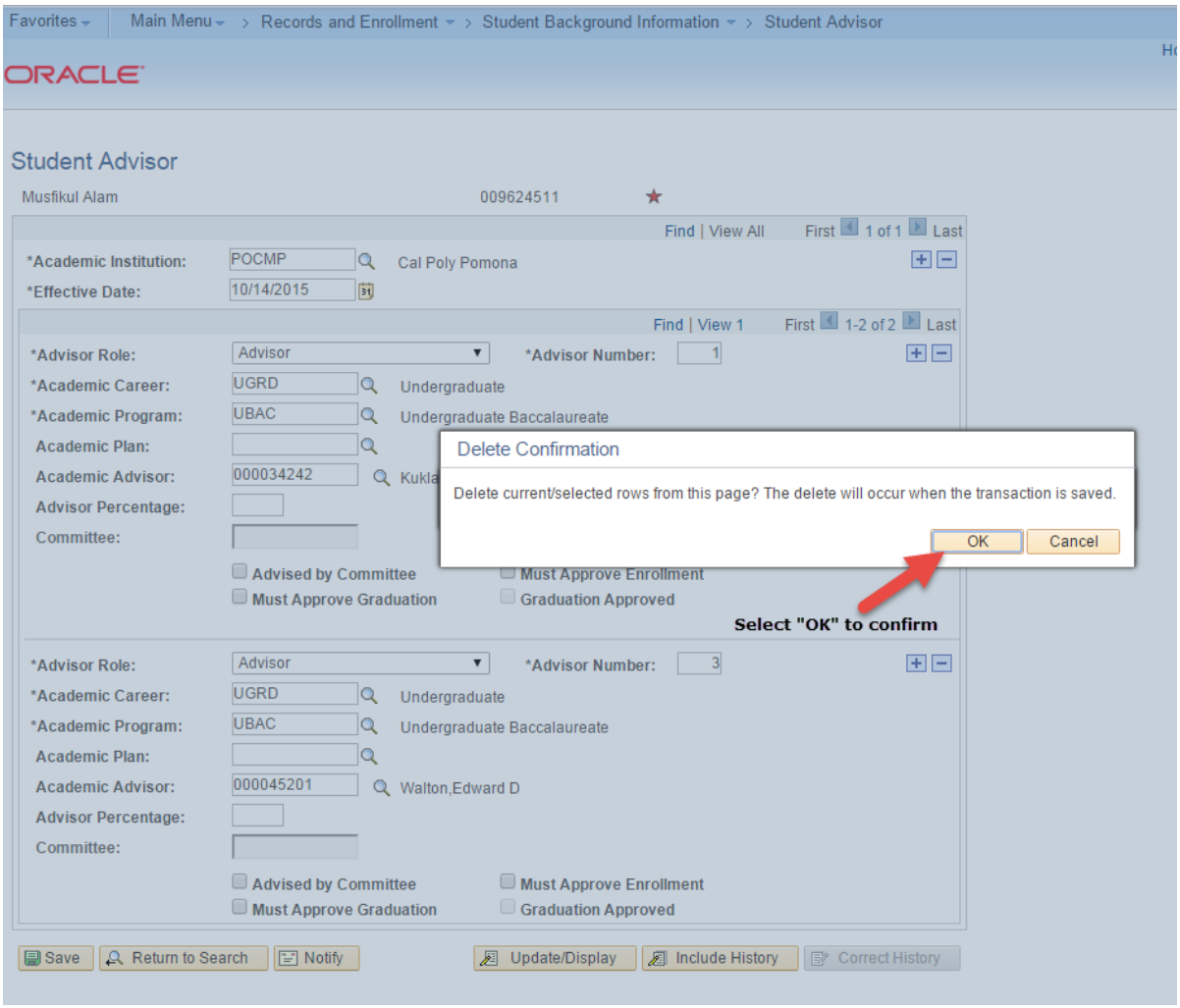

Favorites
Main Menu
Records and Enrollment
Student Background Information
Student Advisor
ORACLE
Student Advisor
Musfikul Alam
009624511
Find | View All
First 1 of 1 Last
*Academic Institution: POCMP Cal Poly Pomona
*Effective Date: 10/14/2015
Find | View All
First 2 of 3 Last
*Advisor Role: Advisor
*Advisor Number: 2
*Academic Career: UGRD Undergraduate
*Academic Program: UBAC Undergraduate Baccalaureate
Academic Plan:
Academic Advisor: 000038506 Ostrowski,Rhonda L
Advisor Percentage:
Committee:
Advised by Committee
Must Approve Enrollment
Must Approve Graduation
Graduation Approved
Step 2: Click the right arrow to select Advisor #2 to be removed
Step 3: Select "minus"
Save
Return to Search
Notify
Update/Display
Include History
Correct History

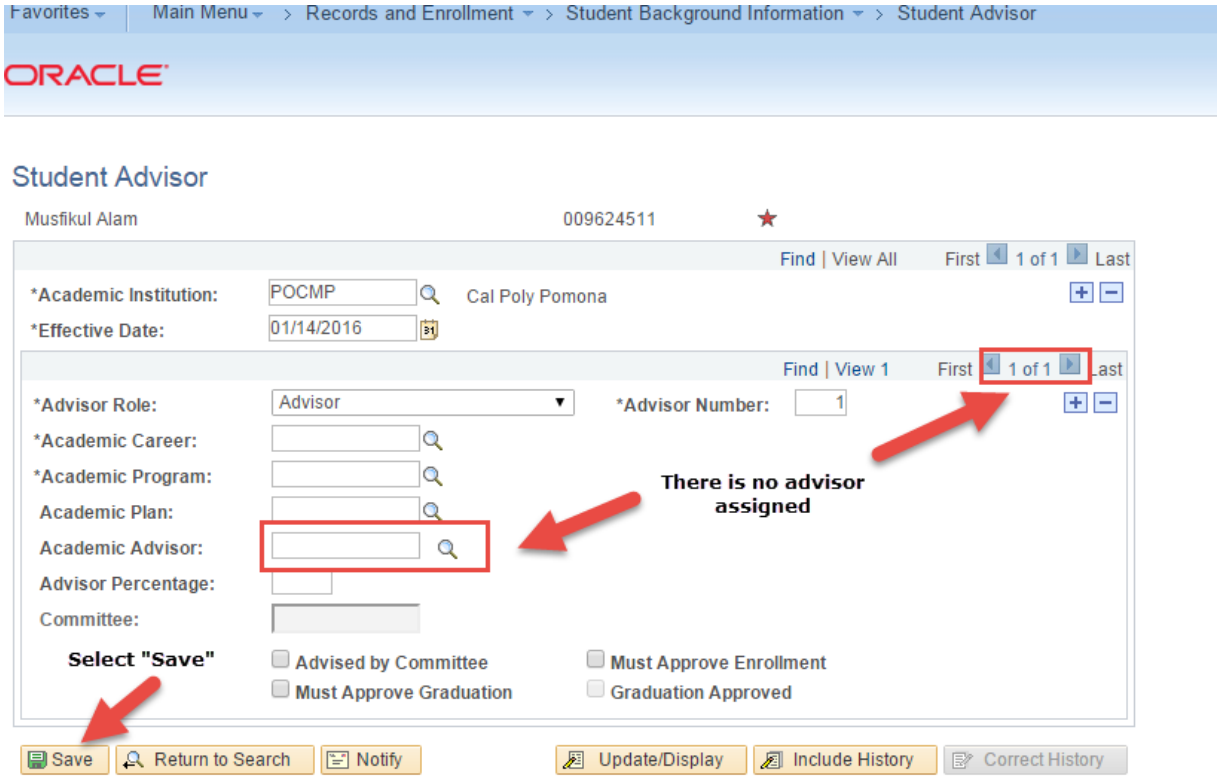

Favorites
Main Menu
Records and Enrollment
Student Background Information
Student Advisor
ORACLE
Student Advisor
Musfikul Alam
009624511
Find | View All
First 1 of 1 Last
*Academic Institution: POCMP Cal Poly Pomona
*Effective Date: 10/14/2015
Find | View All
First 2 of 3 Last
*Advisor Role: Advisor
*Advisor Number: 2
*Academic Career: UGRD Undergraduate
*Academic Program: UBAC Undergraduate Baccalaureate
Academic Plan:
Academic Advisor: 000038506
Advisor Percentage:
Committee:
Delete Confirmation
Delete current/selected rows from this page? The delete will occur when the transaction is saved.
OK
Cancel
Advised by Committee
Must Approve Enrollment
Must Approve Graduation
Graduation Approved
Select "OK" to confirm and then "Save"
Save
Return to Search
Notify
Update/Display
Include History
Correct History

3.) The student has multiple advisors assigned and all of the advisors will be removed

Follow the steps shown in the screens below to remove the advisors from the student.




Favorites
Main Menu
Records and Enrollment
Student Background Information
Student Advisor
ORACLE
Student Advisor
Musfikul Alam
009624511
Find | View All
First 1 of 1 Last
*Academic Institution:
POCMP
Cal Poly Pomona
*Effective Date:
10/14/2015
Find | View 1
First 1-2 of 2 Last
*Advisor Role:
Advisor
*Advisor Number:
1
*Academic Career:
UGRD
Undergraduate
*Academic Program:
UBAC
Undergraduate Baccalaureate
Academic Plan:
Academic Advisor:
000034242
Advisor Percentage:
Committee:
Advised by Committee
Must Approve Enrollment
Must Approve Graduation
Graduation Approved
Delete Confirmation
Delete current/selected rows from this page? The delete will occur when the transaction is saved.
OK
Cancel
Select "OK" to confirm
*Advisor Role:
Advisor
*Advisor Number:
3
*Academic Career:
UGRD
Undergraduate
*Academic Program:
UBAC
Undergraduate Baccalaureate
Academic Plan:
Academic Advisor:
000045201
Walton,Edward D
Advisor Percentage:
Committee:
Advised by Committee
Must Approve Enrollment
Must Approve Graduation
Graduation Approved
Save
Return to Search
Notify
Update/Display
Include History
Correct History

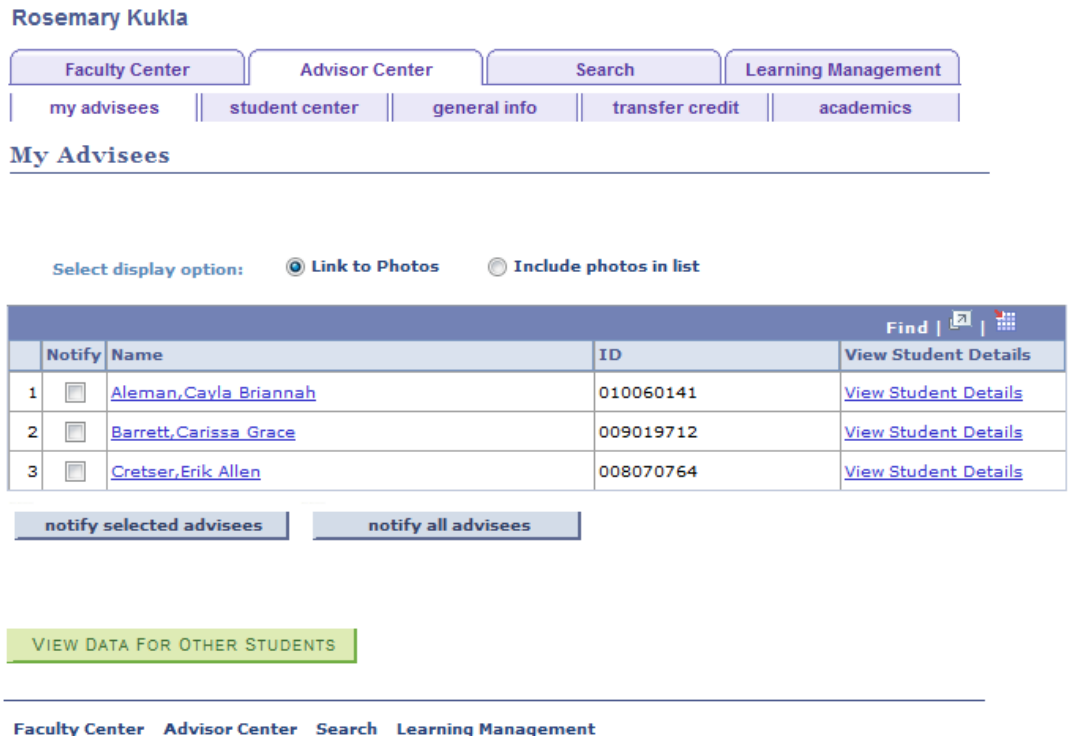

Favorites
Main Menu
Records and Enrollment
Student Background Information
Student Advisor
ORACLE
Student Advisor
Musfikul Alam
009624511
Find | View All
First 1 of 1 Last
*Academic Institution:
POCMP
Cal Poly Pomona
*Effective Date:
01/14/2016
Find | View 1
First 1 of 1 Last
*Advisor Role:
Advisor
*Advisor Number:
1
*Academic Career:
*Academic Program:
Academic Plan:
Academic Advisor:
Advisor Percentage:
Committee:
There is no advisor assigned
Select "Save"
Advised by Committee
Must Approve Enrollment
Must Approve Graduation
Graduation Approved
Save
Return to Search
Notify
Update/Display
Include History
Correct History

For the Advisor: Viewing the list of assigned advisees

In the Advisor Center, select My Advisees:

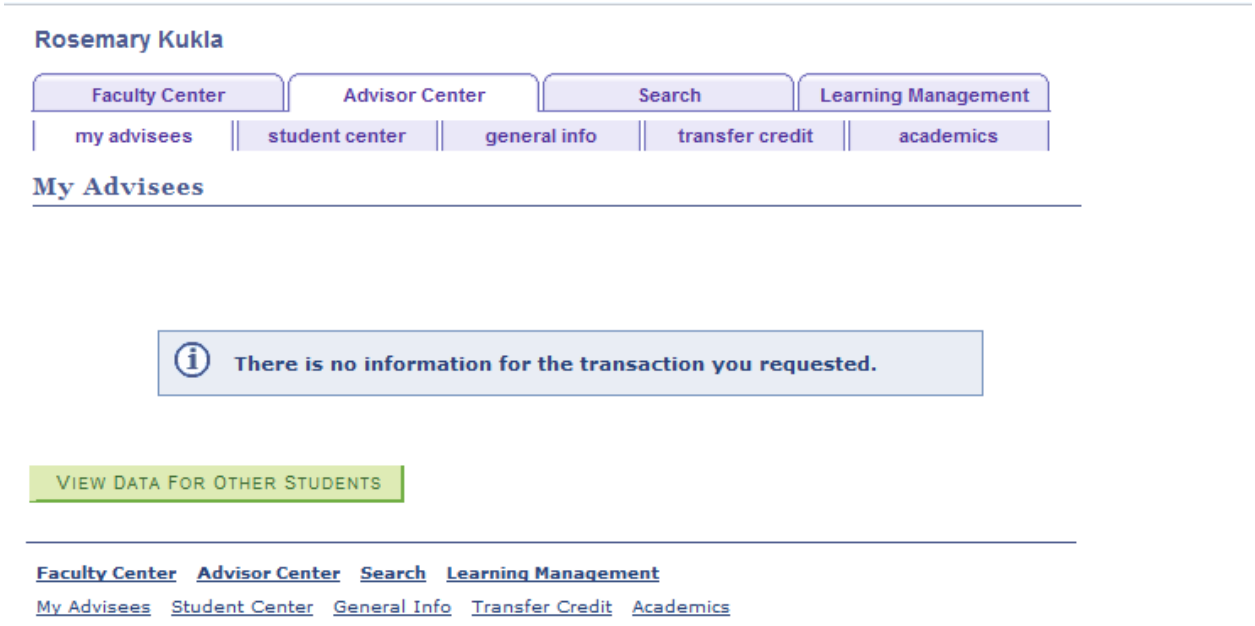
Click on “View Student Details” to see the Student Center for each of your advisees.

Use the VIEW DATA FOR OTHER STUDENTS button to see the Student Center for a student not assigned as your advisee.

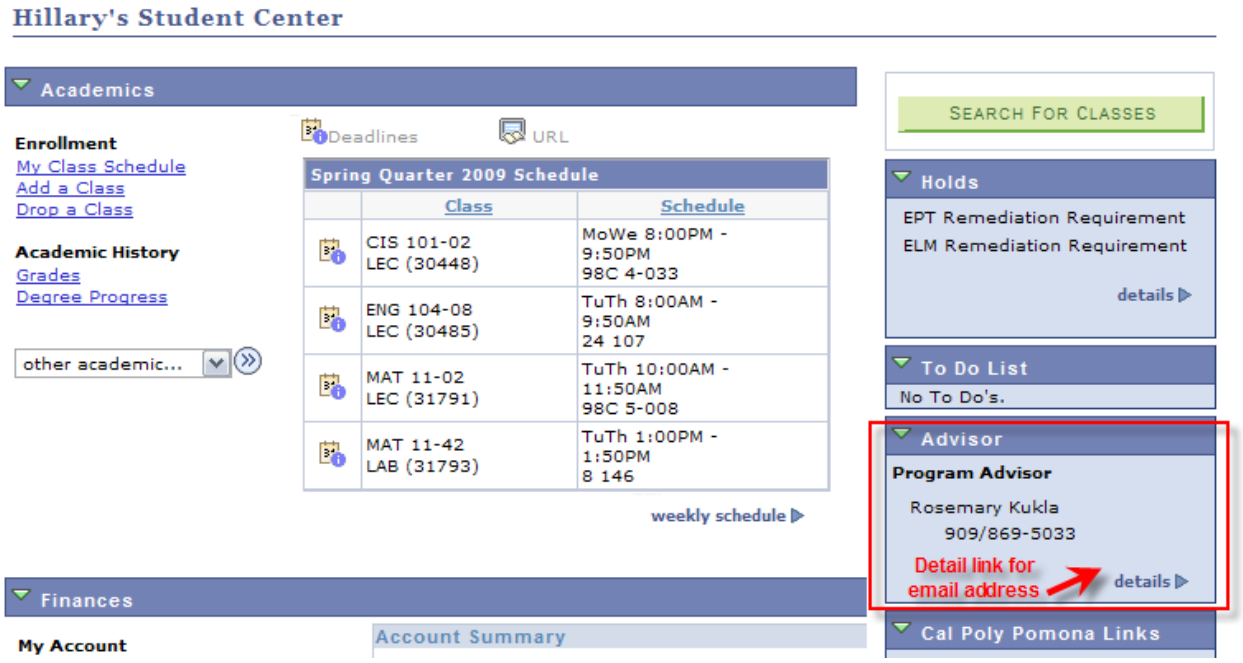


Note: A student who does not have an active major plan does not appear on this list even if assigned to the advisor. This would include students who have graduated or those who have been gone more than two terms.

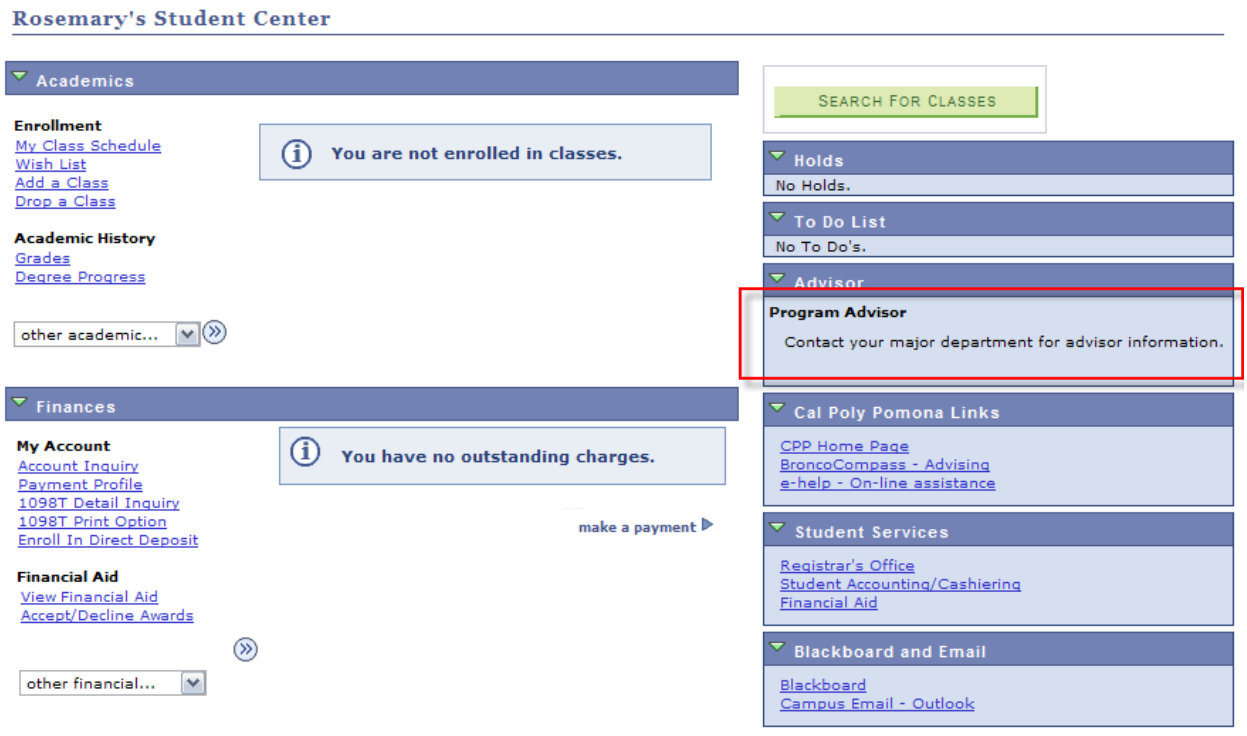
If there are no advisees assigned to an advisor, this is what the page would look like after selecting the “View My Advisees” button.



For the Student: Viewing their assigned advisor's name



View for a student without an assigned advisor:



Appendix A

Glossary of Key Terms

This glossary provides definitions of many terms provided in this user guide to run assign advisor processes. The definitions are basically from the PeopleSoft system tables and are widely used in PeopleSoft data updates and processing.

Academic Career	UGRD – Undergraduate; PBAC – Post-baccalaureate; EXED – Extended Education
Admit Term	Winter/Spring/Summer/Fall + Year. The term code is in the format of Century (1 digit, 2 for 2000)+Year(2 digits, 15 for 2015)+Term (1 digit, 1 for winter, 3 for spring, 5 for summer, 7 for fall). For example, 2093 is 2009 spring quarter and 2157 is 2015 fall quarter)
Admit Type	4 - Transfer student; 5 - First time student/freshman
Academic Program	For assign advisor processes, the most often used program code is UBAC – Undergraduate Baccalaureate. Other codes could be MSTR – Masters, UTRAN – Undergraduate Transitory, CRED – Credential program, etc.
Academic Plan	Majors studied.
Academic Sub-Plan	Minors studied.
Student Group	Three or four alphanumeric character codes used to categorize students. Examples are 2YPG – Two year pledge students, 4PR – Four year pledge priority registration, and IN12 – Undergraduate below 12 units. The codes have to be assigned to students before the assign advisor processes are run.
Class Level	Freshman, Sophomore, Junior, Senior, Post-Baccalaureate and Master.
FTP	File Transfer Protocol – a standard network protocol used to transfer computer files from one host to another host.
Run Control ID	A unique name used to identify which inputs on a page are saved and used to run a process or a report. Run Control ID belongs to individual users. A Run Control ID has to be created by individual users using his or her account and the ID is only visible to the owner.