Module:	Academic Advisement
Business Process Name:	**Advisor Assignments**
Created By:	Kristin Eaton
Creation Date:	May 30, 2013
Revised Date:	April 9, 2014

Table of Contents

Advisor Assignments 2

Security Needed for Advisor Assignment Updates 2

Creating an Advisor Assignment 2

Advisor Details 3

Advisor Role. 6

UA South Assignments. 10

Creating Additional Rows 12

Making Corrections versus Adding a New Effective Dated Row. 13

Deleting a Row 14

Example of a Common Set-Up 15

Checking Your Work 16

Changing the "Work" Number 18

Advisor Assignments for the ARC Website 19

Advising Coordinator Check Box 20

Troubleshooting Advisor Assignments 22

Advisor Assignments

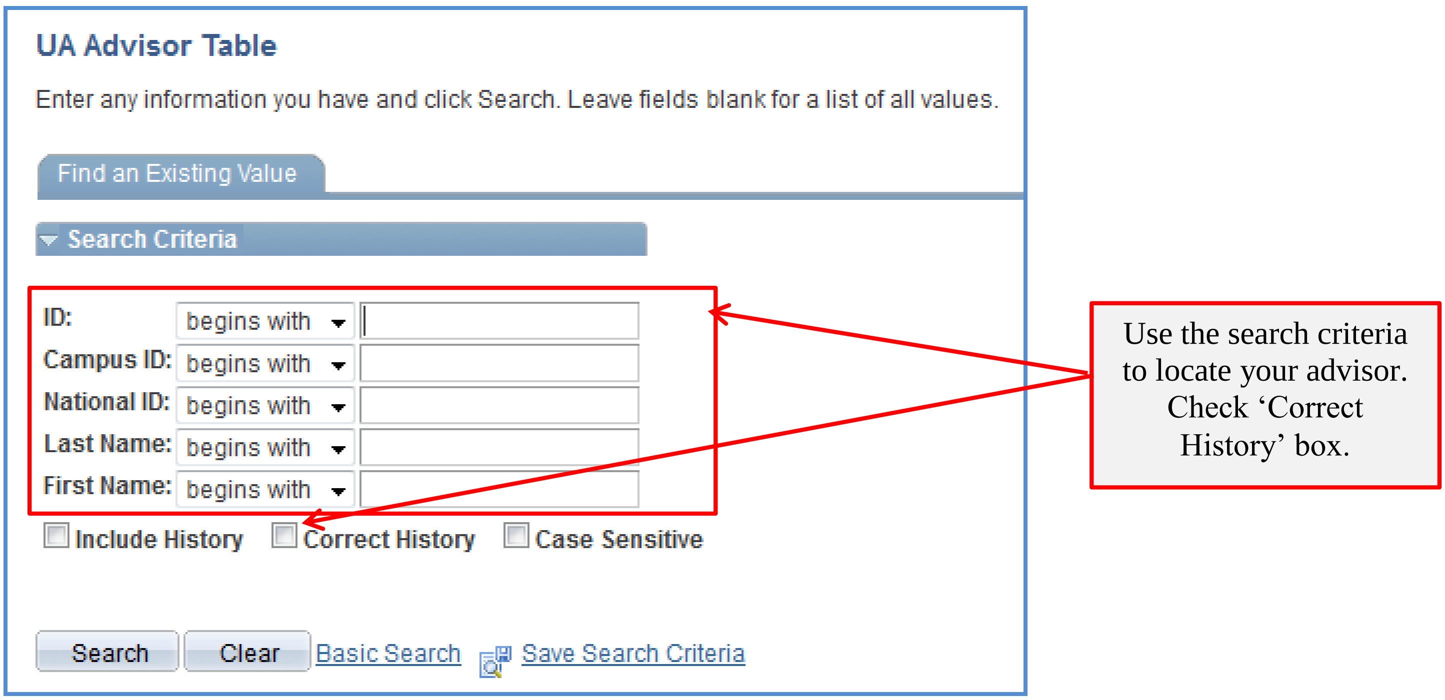
The Advisor Assignment modification uses delivered and modified functionality to populate and maintain information regarding all University of Arizona academic advisors and the rules by which students they advise are assigned. Advising Coordinators/Directors from each college will be responsible for the set-up and maintenance of the tables that hold these rules in UAccess Student.

Security:

The security needed to perform this job can be requested through the Access Provisioning Tool at www.uaccess.arizona.edu. The role can be found through: UAccess Student-Campus Users>Academic Advising>Role-Advisor Assignment Update. For new Academic Advising Directors/Coordinators, this role is also included within the Composite for Academic Advising College Director. Requesting the Composite will gain you the necessary security to perform the necessary tasks associated with Advisor Assignments.

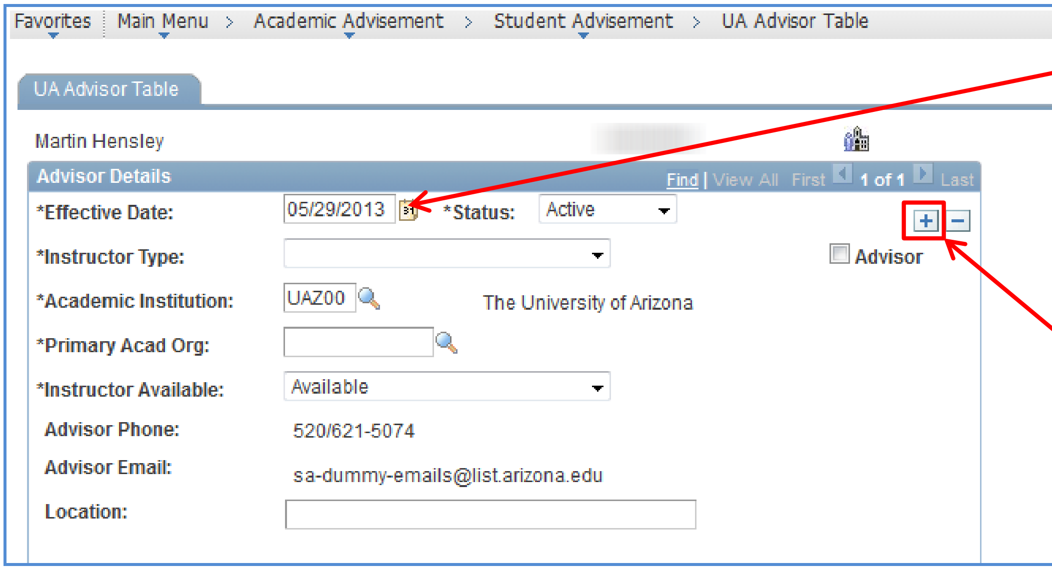
Creating an Advisor Assignment:

With the proper security, one may create an advisor assignment by navigating to the following location within UAccess Student: **Main Menu →Academic Advisement →Student Advisement → UA Advisor Table →Find an Existing Value.**



There are two sections within the *UA Advisor Table*: *Advisor Details* and *Advisor Role. Advisor Details* holds contact and status information for an advisor while the *Advisor Role* defines the advising roles.

Advisor Details:

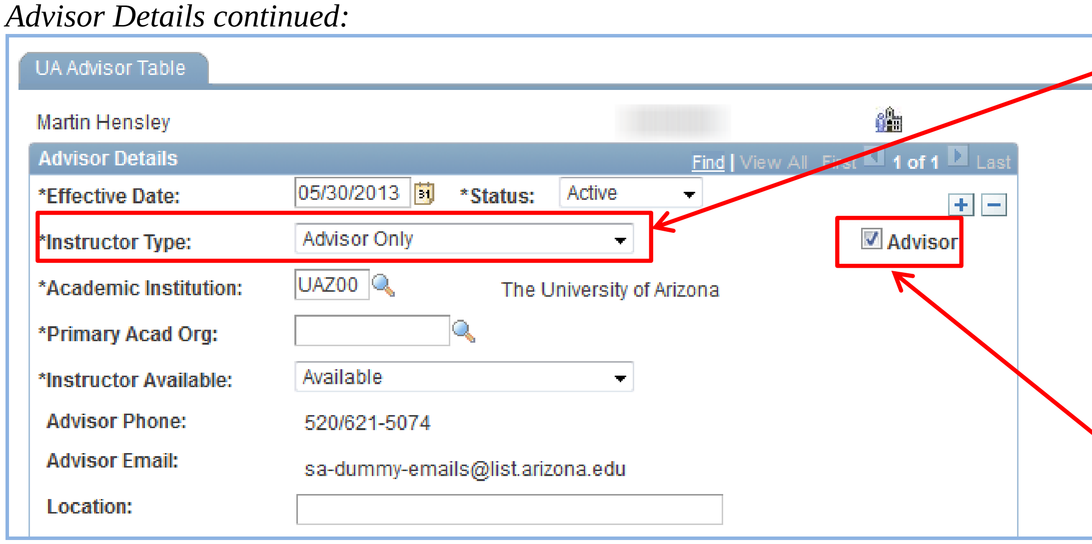


If this is your advisor's first entry, the effective date will default to the current date. You may choose to backdate this to 01/01/1901.

If an existing row appears, click on the + button to create a new row. This new row will appear with the current date.

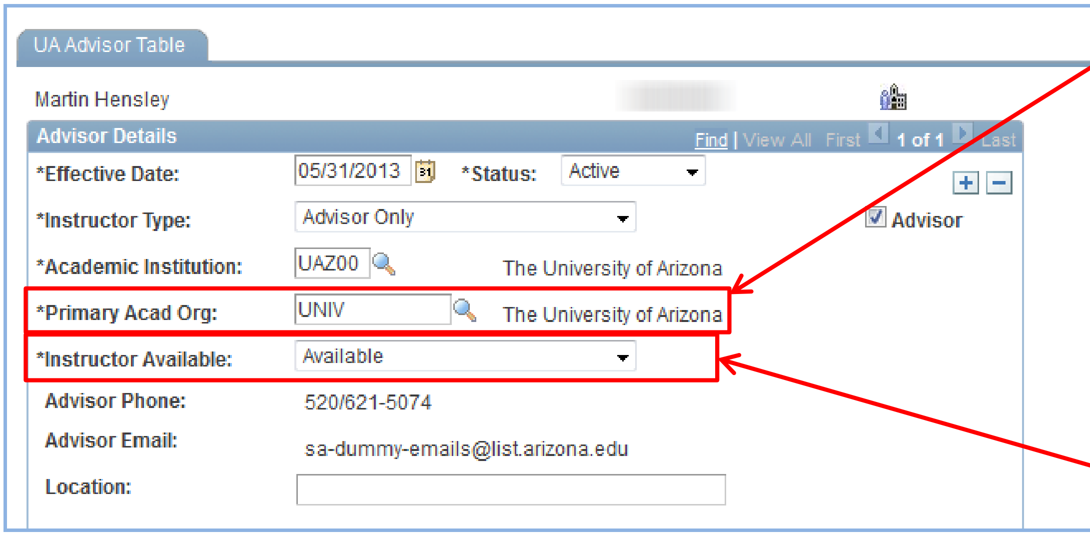
Select the "Instructor Type" within the drop down menu located here. In most cases, this field will be populated with the "Advisor Only" value. However, if the advisor is also an instructor, you may choose to select the respective value.

Advisor Details continued:



If "Advisor Only" value has been selected, the "Advisor" box to the right will be check automatically. If your advisor is any other *Instructor Type*, you will need to check this box manually. Checking this box is critical as it identifies advisors who need to be assigned to students in the batch process.

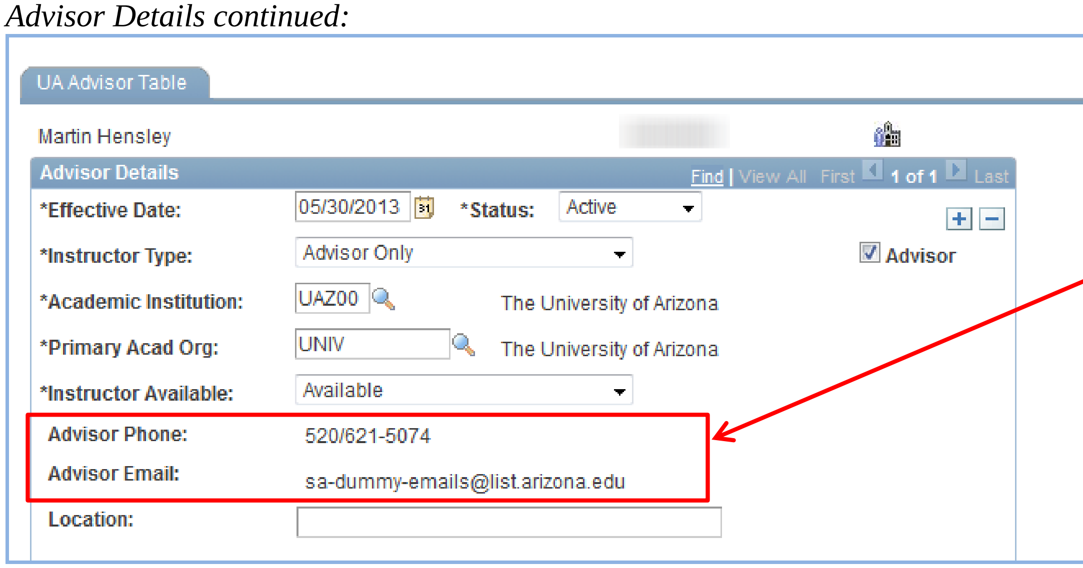
Advisor Details continued:



Since this table shares information with the Instructors table, the "Primary Acad Org" should be left as is. If this field is blank, populate it with the "UNIV" value. This field has no effect on advisor assignments but is necessary to populate.

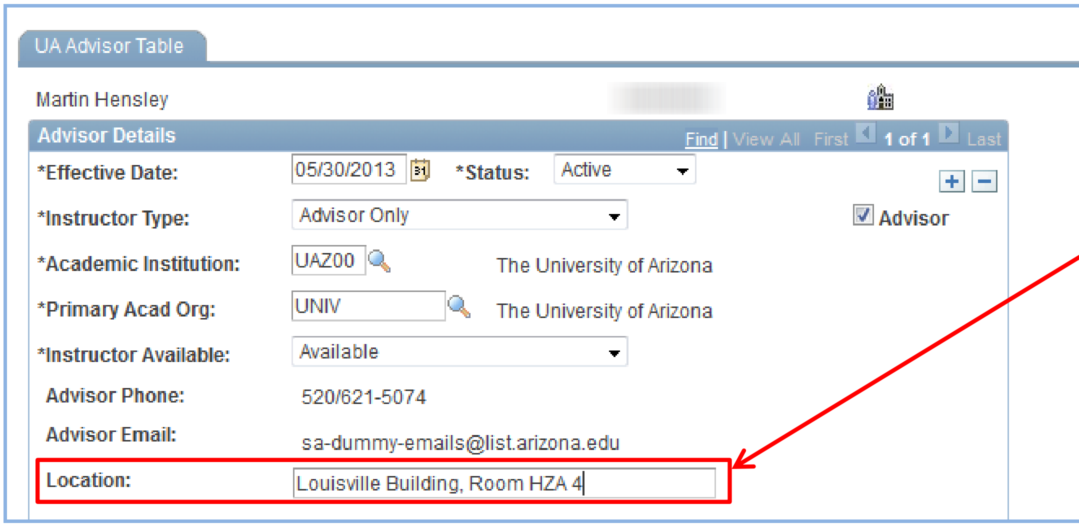
Similarly to the "Primary Acad Org", the "Instructor Available" should be kept as is. If the field is blank, select "Available". This is a required field.

Advisor Details continued:



'Advisor Phone' and is pulling the 'Work' phone type. 'Advisor Email' is using the 'UA Official' email type. Most advisors choose to populate their 'Work' number with a front desk number. Should your advisor choose to update their work phone, they may log into UAccess Employee to do so. Instructions on how to update this phone number can be found on page 16.

Advisor Details continued:



Enter the advisor's location (Building and Room information) into the "Location" field.

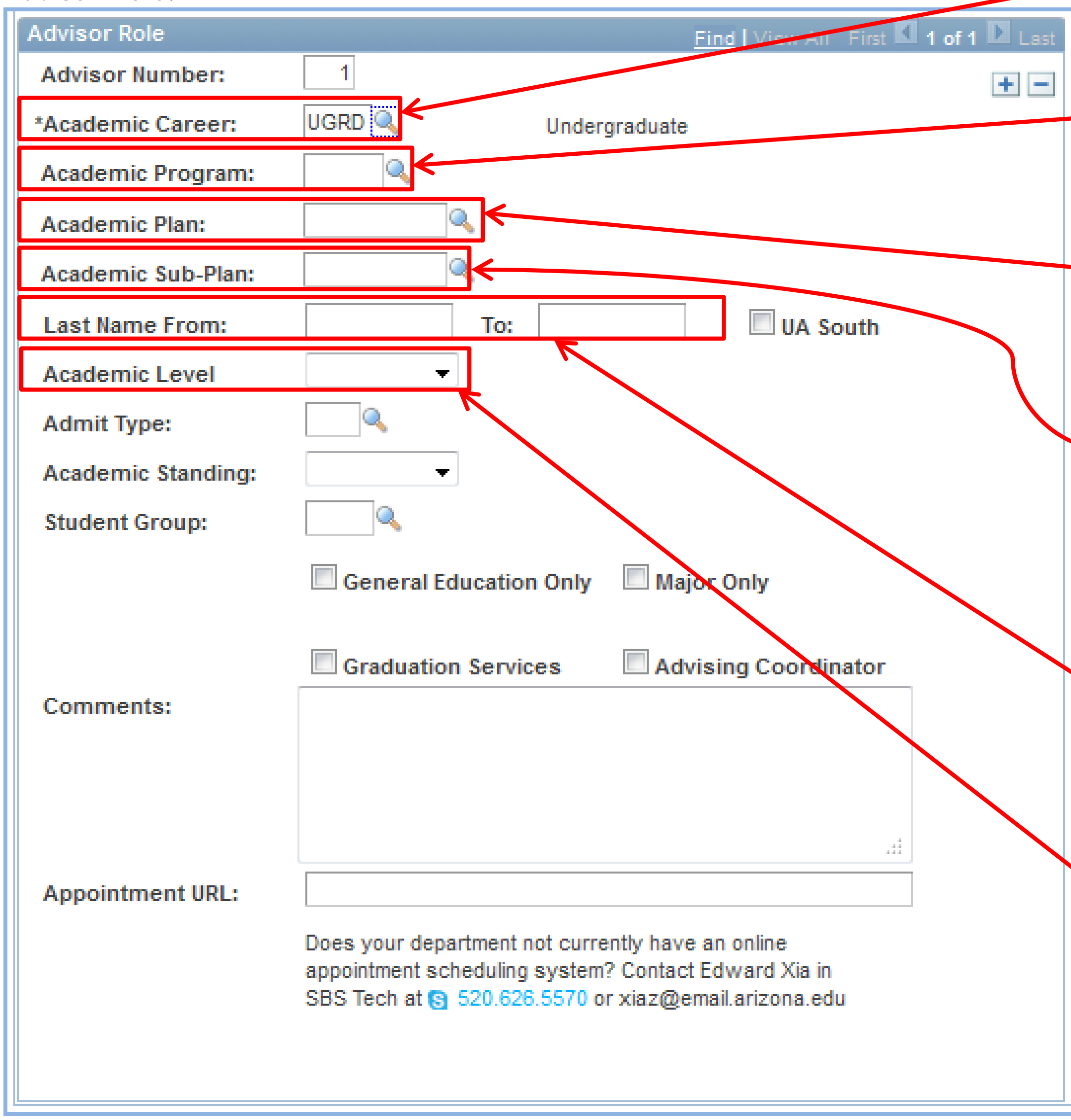
Congratulations. You have successfully completed the *Advisor Details* section of the table! Now, let's move on to the *Advisor Role* section.

<u>Advisor Role</u>

As previously noted, the *Advisor Role* area allows us to define the population of students an advisor may see. Roles can be defined based on academic program (College), academic plan (Majors and Minors), last name preferences, student groups, and other values seen in the picture below. Each piece additional field that is populated allows you to further define the Advisor's role and student population.

Also within this area, you may include the URL to your online appointment system or website information that describes to students how to make an appointment. This will allow students to link to this page from their *My Advisor* screen in Student Services Center. If departments within your college do not currently have an online appointment scheduling system and are interested in having one, please contact Edward Xia in SBS Tech at xiaz@email.arizona.edu.

Advisor Role:



Academic Career should **<u>always</u>** be populated with *UGRD.*

** *Academic Program* provides all UA Colleges. **

** *Academic Plan* provides all major, major 2, and minor codes.**

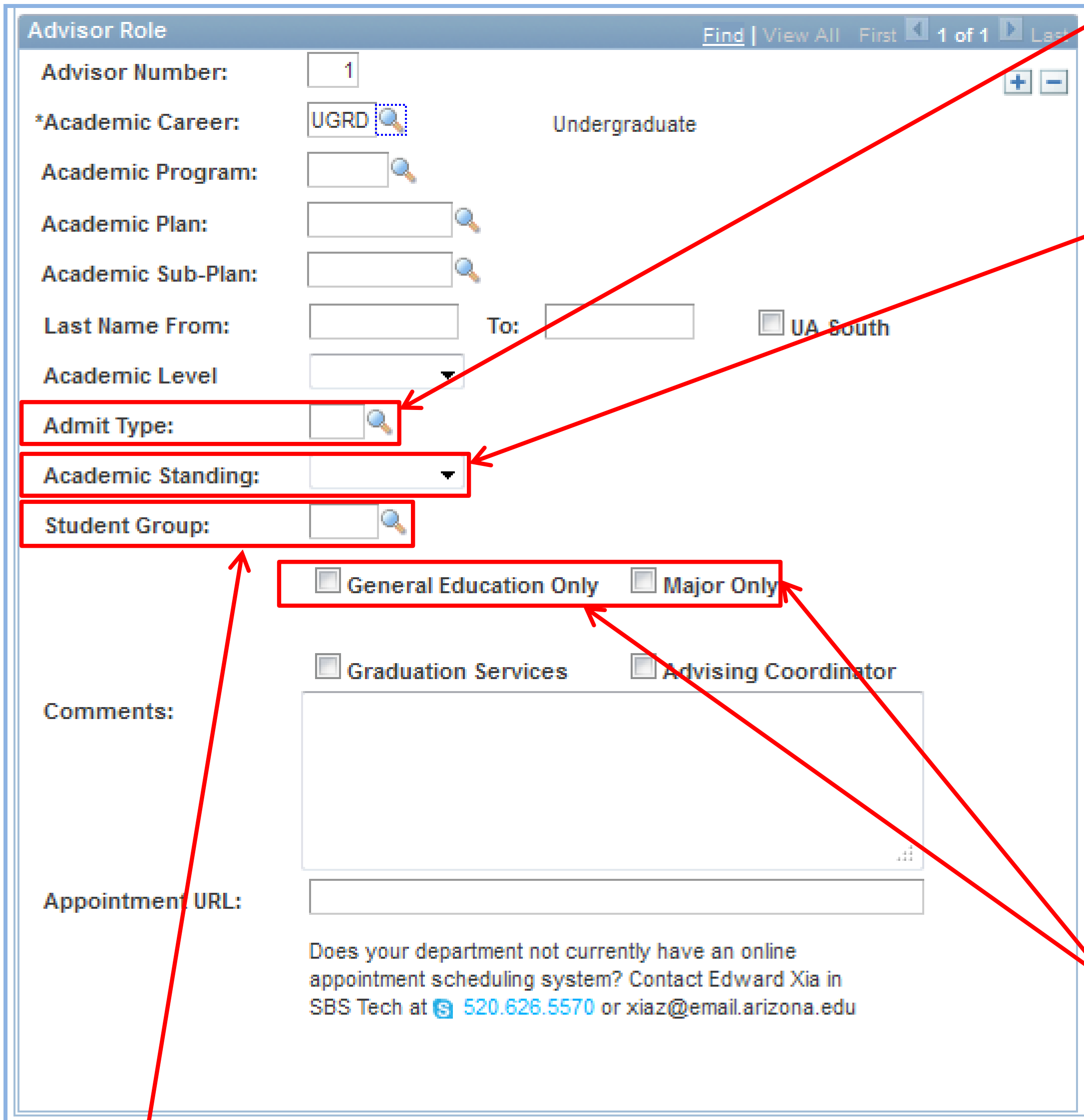
If your major has an *Academic Sub-Plan* and the advising roles are broken out by this value, you may select your sub-plan value here.

If advising roles are broken out by last name preferences, these values may be defined here.

The *Academic Level* field contains values such as *Freshmen, Sophomore, Junior, Senior*. As well as, *1st Year, 2nd Year, 3rd Year, 4th Year, and 5th Year*. University of Arizona only utilizes Freshmen through Senior status for undergraduates.

****Note:** Please do not populate both Academic Program and Academic Plan. Choose to populate the field that best fits the advising roles within your College. **

Advisor Role continued:



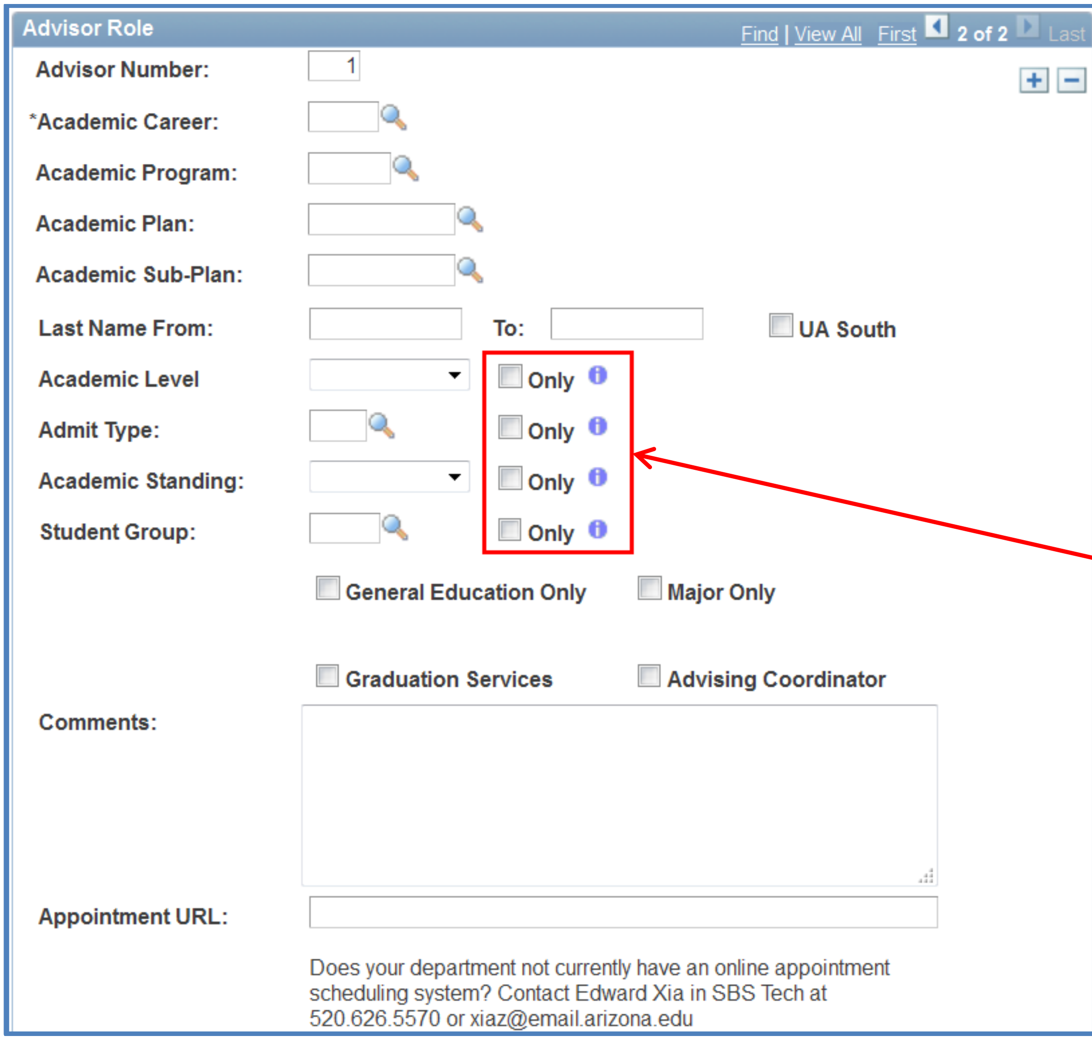
Admit Type includes values such as *Freshmen*, *Transfer*, and *Readmit*.

Academic Standing may be used if you have an advisor works specifically with students who are on *probation* or those who are *subject to dismissal*. Using "Good" standing will only capture students with an actual GPA. New students (first year or transfer) will not be captured.

If you have an advisor who **only** advises general education requirements OR **only** advises major requirements, you may want to select those values here. Note: We will be getting rid of the *Minor Only* and *Major and Minor Only* values.

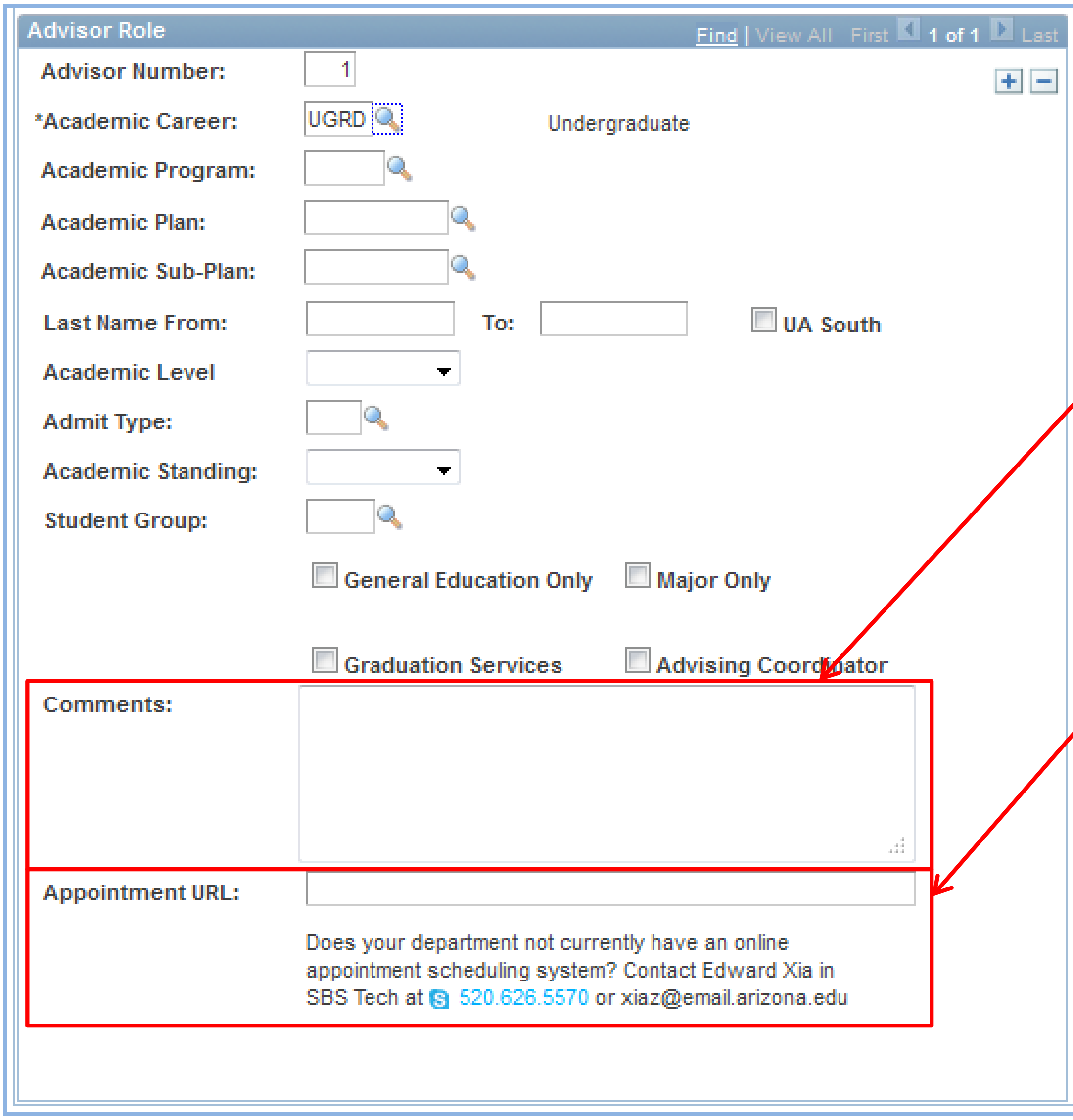
If your advisors' roles are based off of *Student Groups*, define them here.

Advisor Role continued:



Populating the *ONLY* checkbox for this field will allow for students with the defined criteria to be assigned to this particular advisor only (within the specified Academic Program or Academic Plan).

Advisor Role continued:



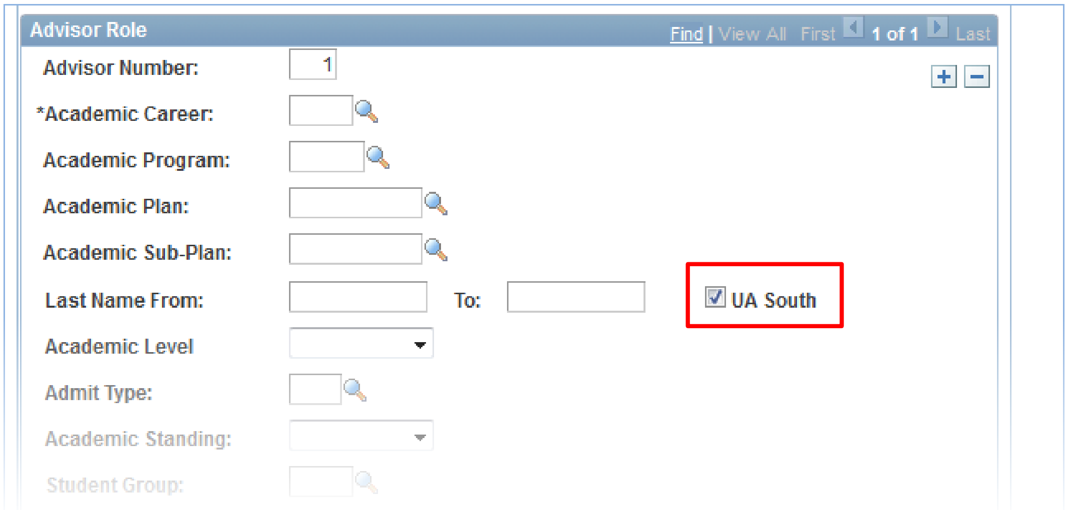
The *Comments* box may be used to provide a short message to the students. The message appears to students in Student Services Center on the *My Advisor* page. This message is currently limited to 254 characters and is not necessary to populate, although helpful to students.

If the advisor's department has an online scheduling system or a webpage that describes how to make an appointment, the URL may be placed here. This field is not mandatory to populate.

If you have departments interested in having an online appointment scheduling system, please contact Edward Xia in SBS Tech at xiaz@email.arizona.edu.

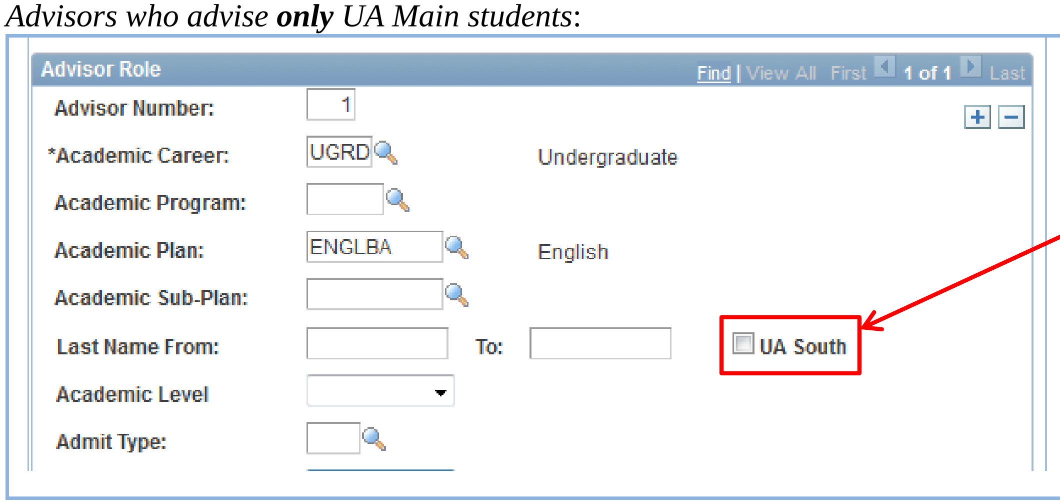
UA South Assignments:

There are some academic plans that exist on both UA Main and South campuses and each have their own respective advisors. However, there may be some special advising areas whom advise both UA Main and South students. The UA South check box helps the assignment process to determine whether or not to include students with the UA South student group. UAS maintains their student populate with the following student groups: SODG, SOOL, SOPC, SOPE, SOPW, SOSC, SOSV, SOTP, SOYU, WUES.



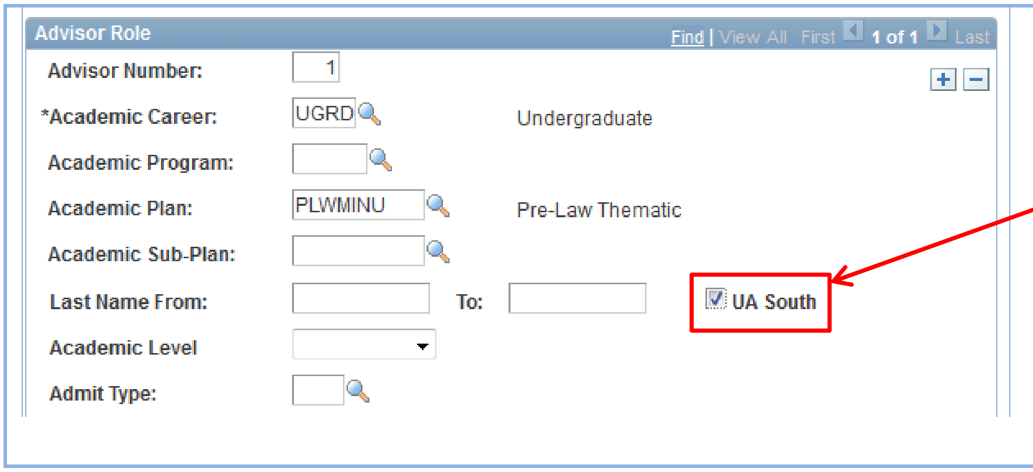
Use the following guidelines to help you determine how to use this check box for your advising populations:

*Advisors who advise **only** UA Main students*:



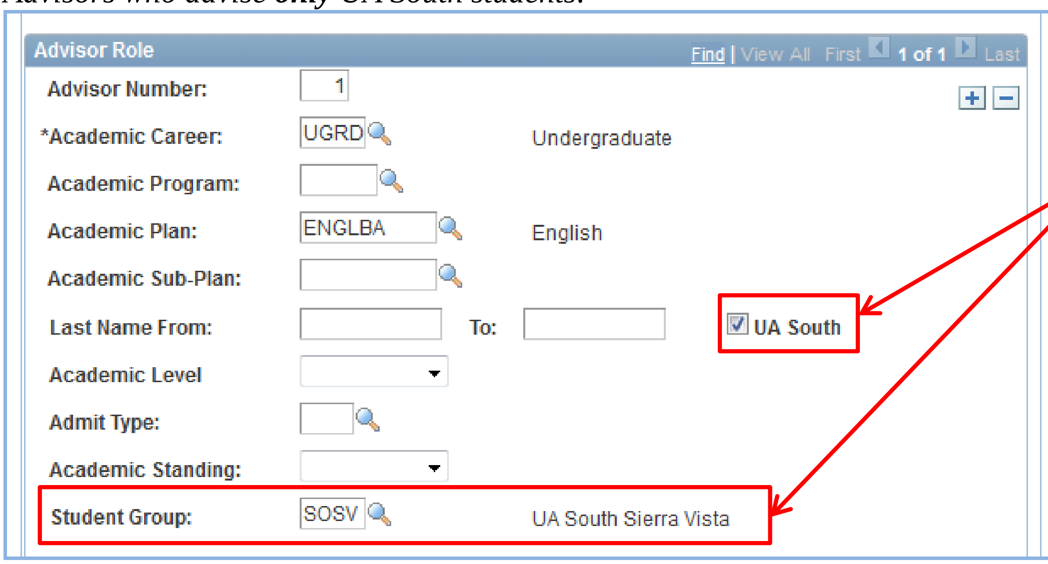
<u>Leave box unchecked:</u>
This example represents an advisor who sees ENGLBA students on UA Main Campus only.

Advisors who advise ***both*** *UA Main and* ***all*** *South students*:



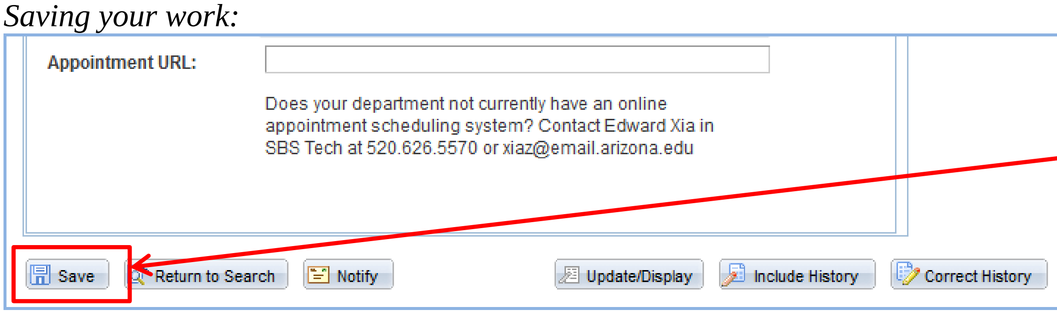
Check the box:
This example represents an advisor who sees both UA Main and UA South students.

Advisors who advise ***only*** *UA South students:*



Check the box AND populate the respective UA South student groups: Populating the student group area with the appropriate UA South student group is necessary so that the process excludes UA Main students from the assignment. If the advisor sees students from more than one UA South campus, create an additional row to include the other UA South student groups. See pg. 10 to learn how to create an additional row.

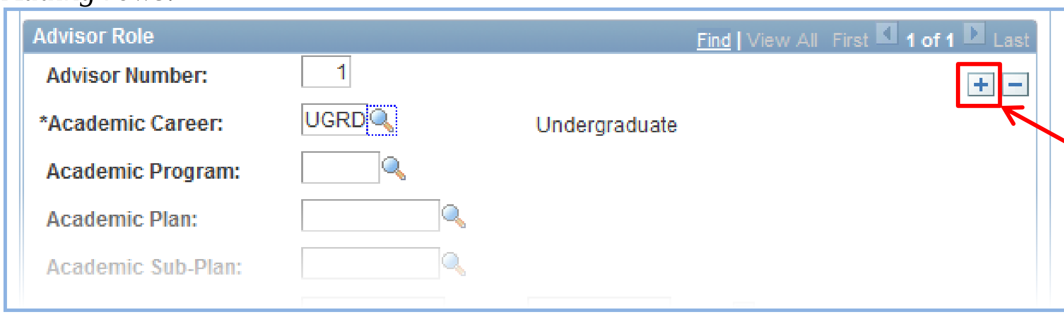
Saving your work:



When the appropriate *Advisor Detail* and *Roles* has been populated into the tables, click Save.

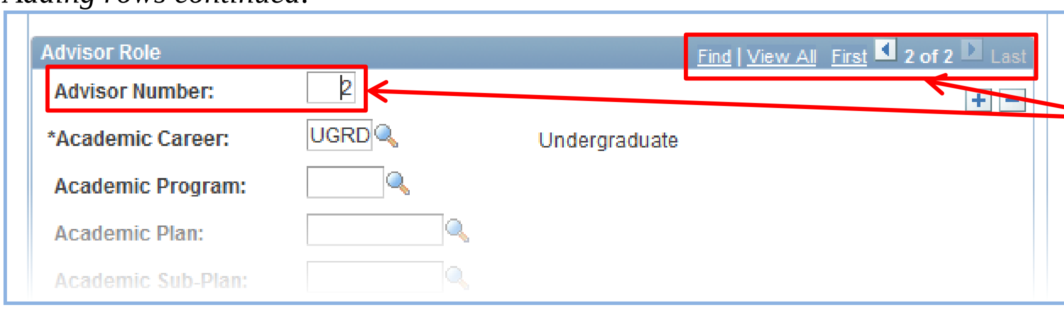
Creating additional rows:

Adding rows:



Advisors have more than one role (or advise students from more than just one academic plan or student group). Use the button to create an additional row to define more roles. *Comments* and *URLs* for each row added may include different information from the proceeding rows.

Adding rows continued:



When a new row is added in the *Advisor Role* section, we it added within the heading and *Advisor Number* field.

Making Corrections:

Making Corrections:
Mistakes happen, punctuation is left out, and major two academic plan codes are forgotten about. Your security for Advisor Assignments allows you to go back to make corrections on work that has already been saved. There are two ways to put the system in *Correction Mode:*

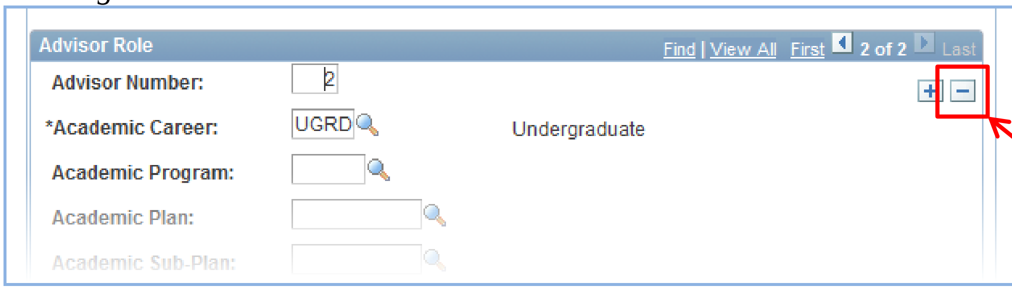
From the Search Criteria screen:

From the *Search Criteria*, click Correct History and then Search.

From the UA Advisor Table:

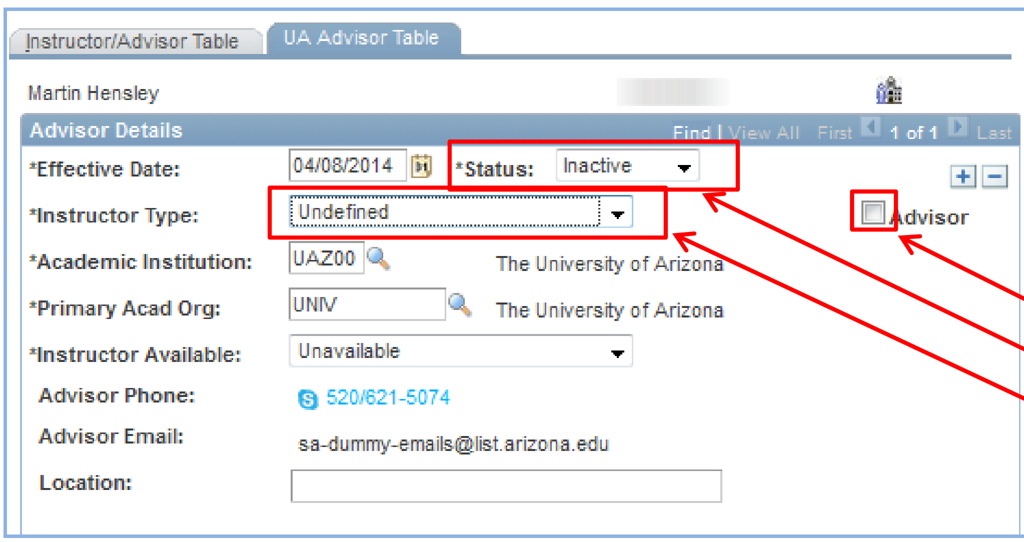
Click Correct History. Once you do this, the button will gray-out, letting you know that you are in correction mode: Correct History

Deleting a row:



To delete a row, click Correct History to be in correction mode. Then, click on the button. Save your work.

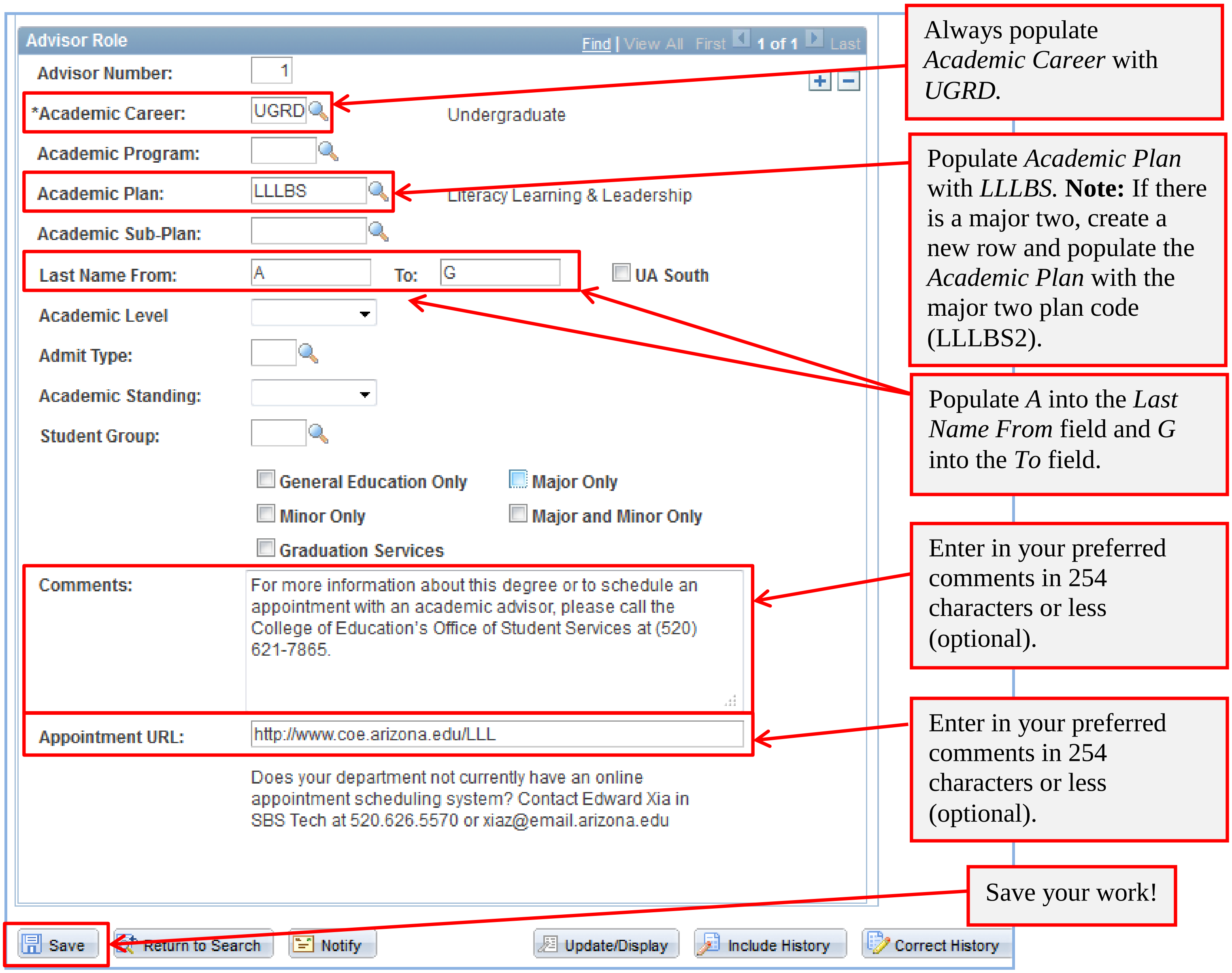
Inactivating an Advisor from Assignments:
When there is advisor turn-over, a permanent reassignment of advising duties, or a temporary reassignment of duties, there may be need to inactivate an advisor's assignments.



Change Status to *Inactive* and Instructor Type to *Undefined* (or something other than *Advisor Only).* Finally, uncheck the Advisor checkbox. And Save.

Example of a Common Set-up

Sara advises Literary, Learning, and Leadership students whose last name begins with A-G:

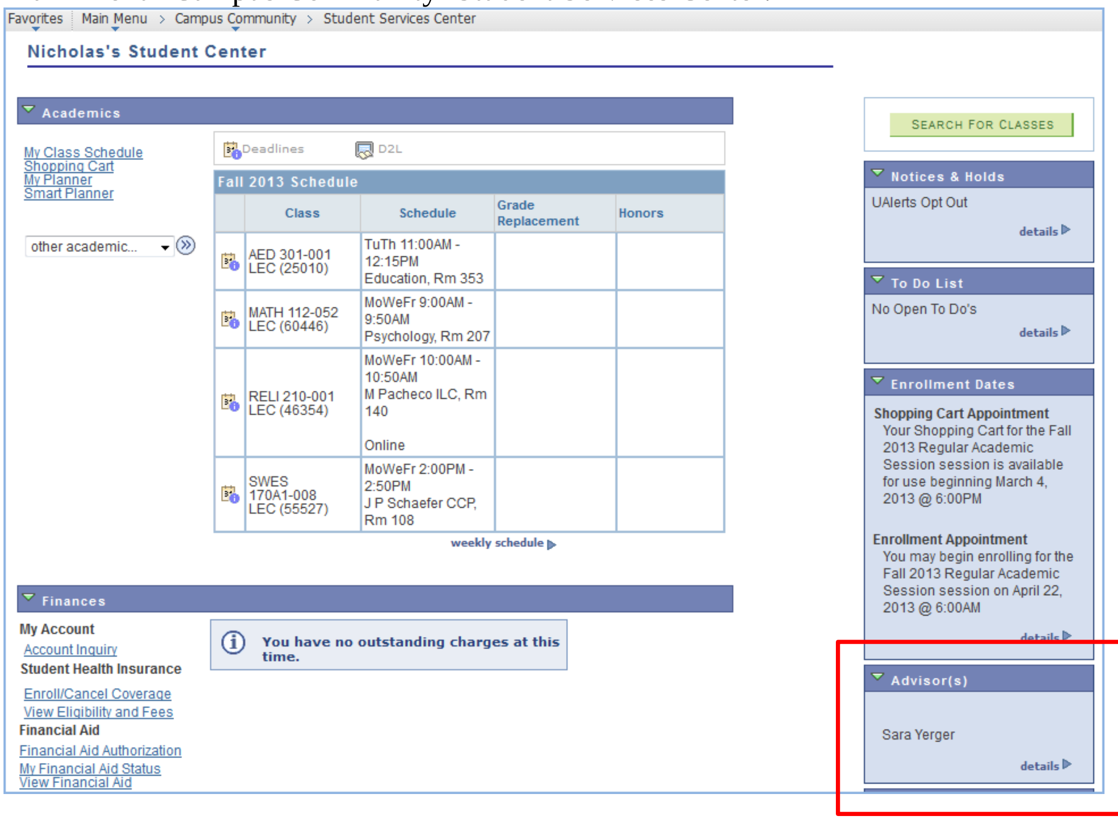


Checking Your Work

After the tables are populated with the advisor details and roles, there is a daily overnight process that occurs to assign advisors to students who match the values added into the *UA Advisor Tables*. To check your work, you may select an individual student ID and view the assignment in *Student Service Center* or you may use *Query Viewer* to pull a list of students that an advisor was assigned to:

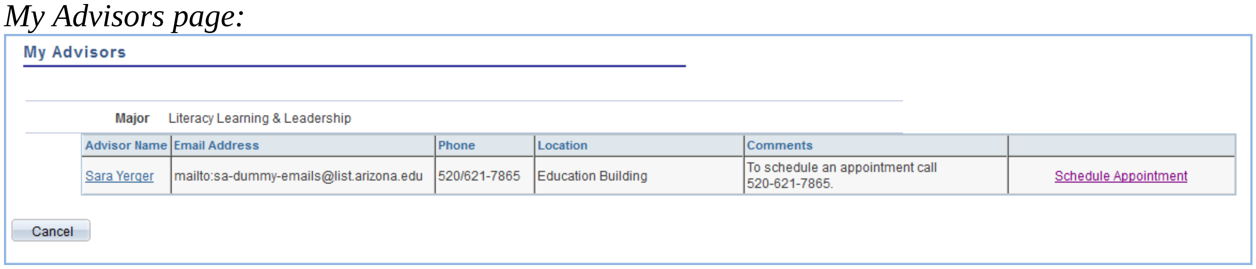
Via Student Services Center:

Main Menu>Campus Community>Student Services Center:

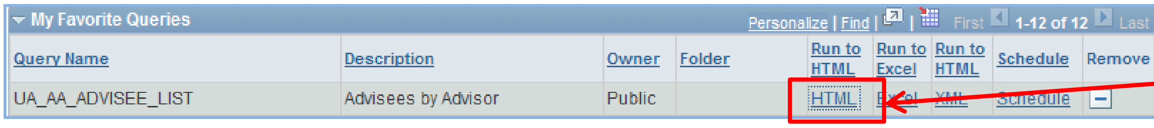


Here we see that Sara is listed as an Advisor. Click on the *details* link for more information.

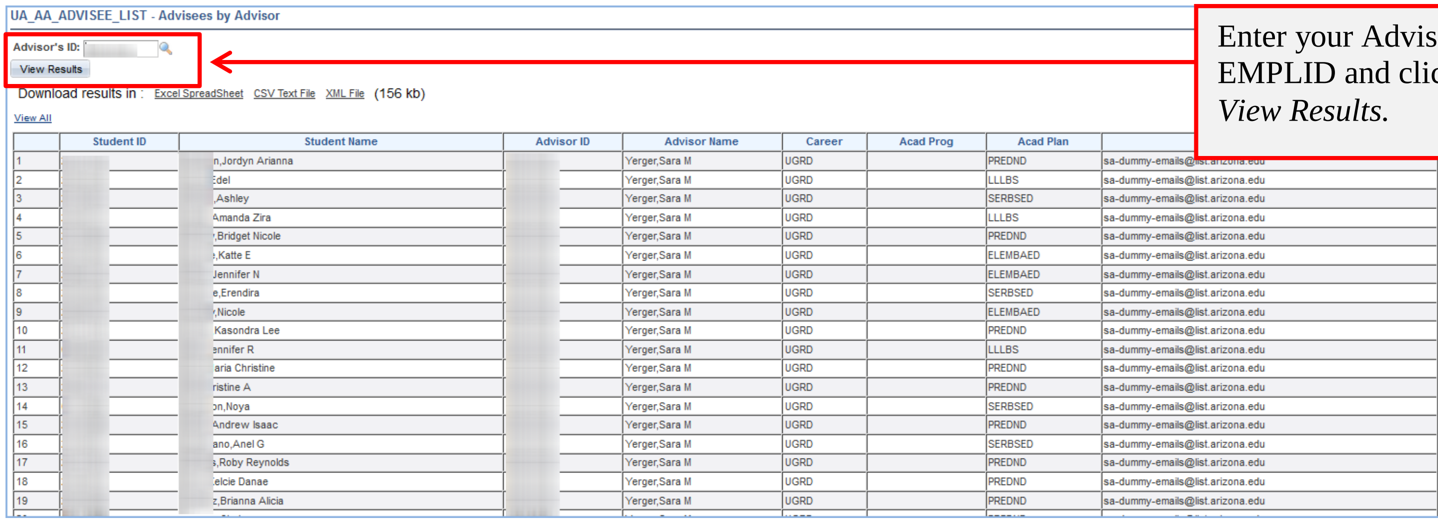
My Advisors page:



Via Query Viewer:
Main Menu>Reporting Tools>Query>Query Viewer. Search for query UA_AA_ADVISEE_LIST. Add to favorites for later use.



Click on *HTML.*


UA_AA_ADVISEE_LIST - Advisees by Advisor

Advisor's ID:

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (156 kb)

View All

	Student ID	Student Name	Advisor ID	Advisor Name	Career	Acad Prog	Acad Plan	
1		n,Jordyn Arianna		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu
2		Edel		Yerger,Sara M	UGRD		LLLBS	sa-dummy-emails@list.arizona.edu
3		,Ashley		Yerger,Sara M	UGRD		SERBSED	sa-dummy-emails@list.arizona.edu
4		Amanda Zira		Yerger,Sara M	UGRD		LLLBS	sa-dummy-emails@list.arizona.edu
5		,Bridget Nicole		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu
6		,Katte E		Yerger,Sara M	UGRD		ELEMBAED	sa-dummy-emails@list.arizona.edu
7		Jennifer N		Yerger,Sara M	UGRD		ELEMBAED	sa-dummy-emails@list.arizona.edu
8		e,Erendira		Yerger,Sara M	UGRD		SERBSED	sa-dummy-emails@list.arizona.edu
9		,Nicole		Yerger,Sara M	UGRD		ELEMBAED	sa-dummy-emails@list.arizona.edu
10		Kasondra Lee		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu
11		ennifer R		Yerger,Sara M	UGRD		LLLBS	sa-dummy-emails@list.arizona.edu
12		aria Christine		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu
13		ristine A		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu
14		on,Noya		Yerger,Sara M	UGRD		SERBSED	sa-dummy-emails@list.arizona.edu
15		Andrew Isaac		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu
16		ano,Anel G		Yerger,Sara M	UGRD		SERBSED	sa-dummy-emails@list.arizona.edu
17		s,Roby Reynolds		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu
18		elcie Danae		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu
19		z,Brianna Alicia		Yerger,Sara M	UGRD		PREDND	sa-dummy-emails@list.arizona.edu

Enter your Advisor's EMPLID and click *View Results.*

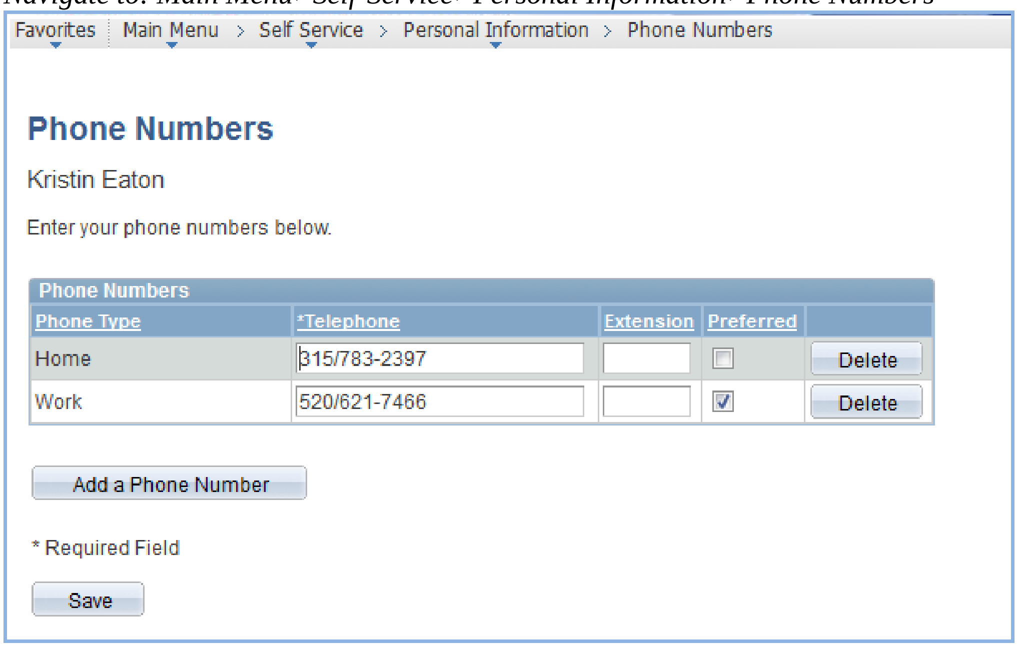
Advisor Phone Number:

There are four different types of phone numbers that may be stored in UAccess: *Work*, *Campus*, *Home*, and *Cell*. Advisor Assignments uses the *Work* number as this is, most often, the number that aligns with what appears in the University of Arizona's online phonebook (http://www.arizona.edu/phonebook). However, in the cases where there is not a *work* number that exists for an individual, the phonebook then chooses to display the individual's *campus* phone number. Advisor Assignments only shows *work*. Please have your advisors check to make sure they have a *work* number populated and it is the number they prefer to have appear in Advisor Assignments.

Follow these instruction to update your phone number:

Go to www.uaccess.arizona.edu and log into UAccess Employee.

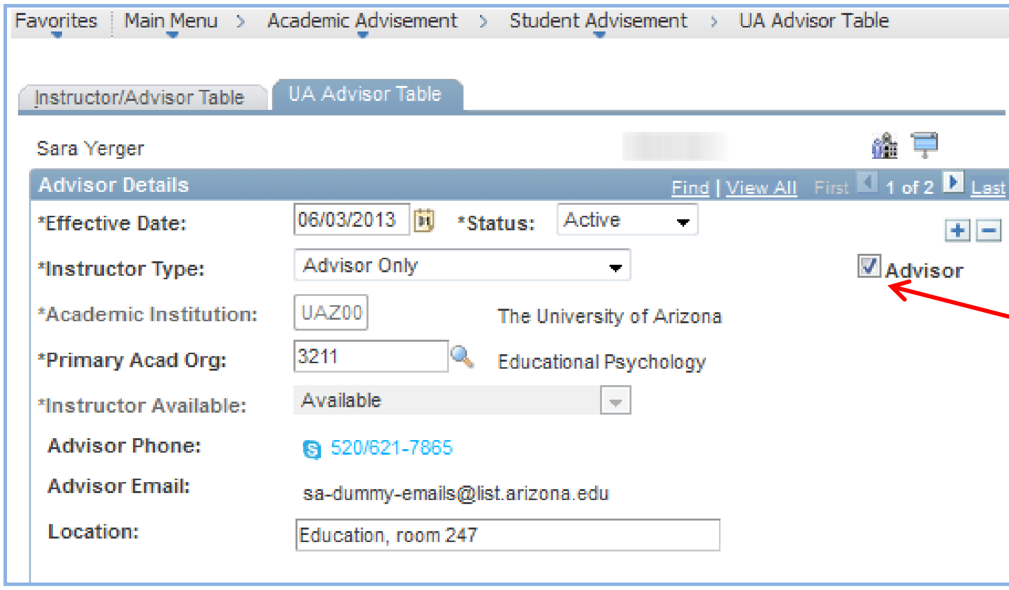
Navigate to: Main Menu>Self-Service>Personal Information>Phone Numbers



Check to make sure a *Work* number exists. If it does, feel free to edit it to your preferred number. If a *Work* number does not exist, click *Add a Phone Number*. From here, you will be able to select *Work* as the *Phone Type*. Once you are satisfied with your updates, click *Save*.

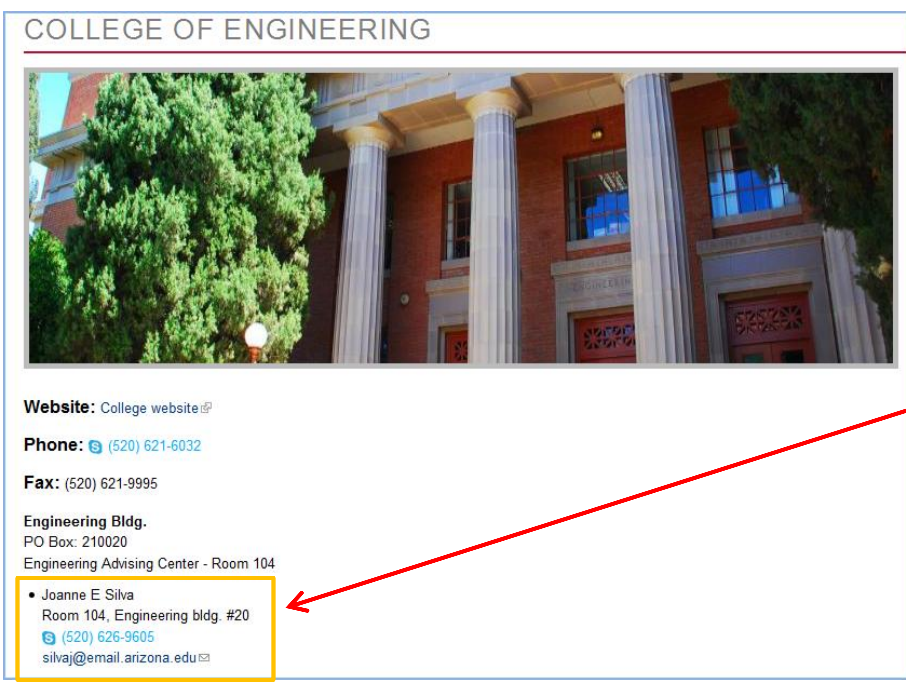
Using Advisor Assignments to Populate Directory Information for Advising Resource Center (ARC):

Advisor Directory information found on the Advising Resource Center (ARC) website, www.advising.arizona.edu, is provided by the contact information maintain by Advising Assignments in UAccess. A web service is used to deliver the information from UAccess. Any advisor who has an active UA Advisor Table with the Advisor check box marked will be included in the web service and directed to the appropriate major page. While UAccess student provides directory information for the website, Roxie Catts and the UA Marketing Team are responsible for the all other various functions of the site.



Advisors who have the "Advisor" check box marked within their UA Advisor Table will be included in the ARC web service.

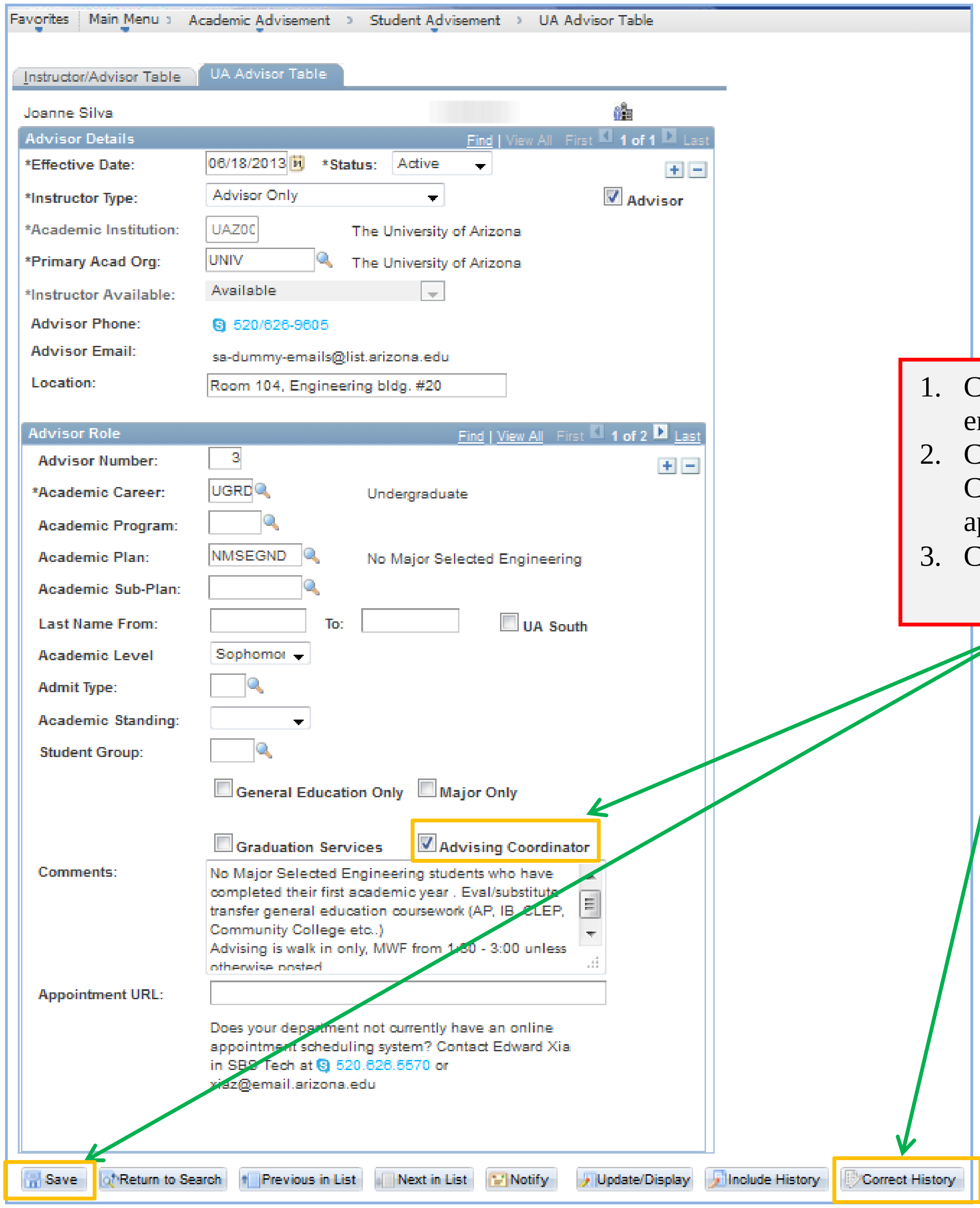
After the release of the new ARC website, it was determined by the Advising Community that there would be need to have the web service identify advisors or Advising Coordinators/Directors whose information should be populated on the College page of the ARC website. The Advising Coordinator check box within the Advisor Role section of the UA Advisor Table may be used to make this identification:



Here Joanne Silva populates on the College page for the College of Engineering.

Using Advising Coordinator Checkbox with an existing table:

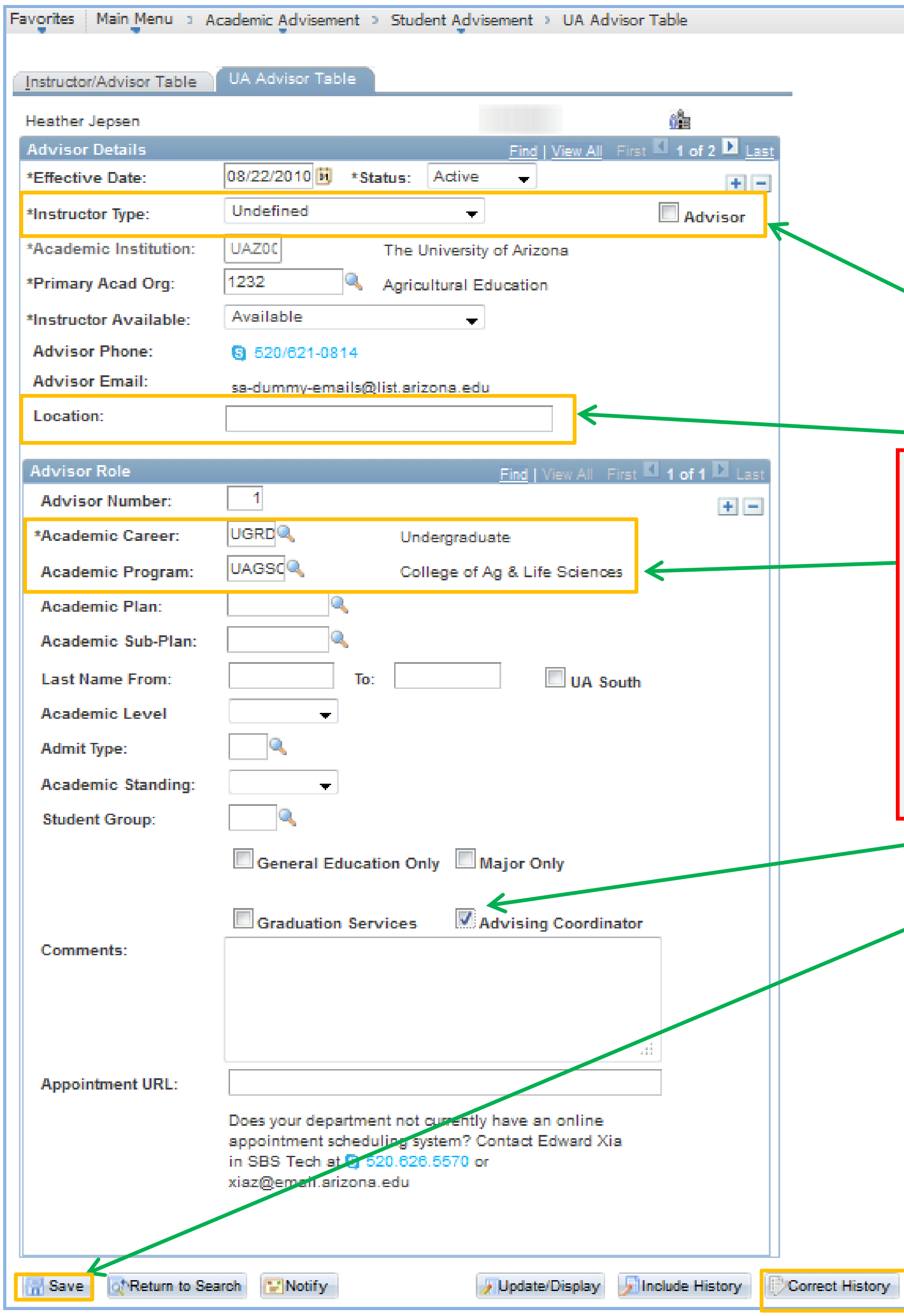
Below, Joanne is already being assigned to students in UAccess based upon the Advisor check box and Academic Plan field being populated. To identify her as an advisor who should be displayed on the College of Engineering page within the web service for the ARC website, populate the Advising Coordinator check box:



1. Click Correct History to enable corrections.
2. Check the Advising Coordinator box on the appropriate role.
3. Click Save.

Using Advising Coordinator Check box to populate information in ARC only
(advisor is not assigned to students in UAccess)

Some Advising Coordinators are not officially assigned to students in UAccess but still need their information populated on the respective ARC College page. Use the following steps to complete this set-up:

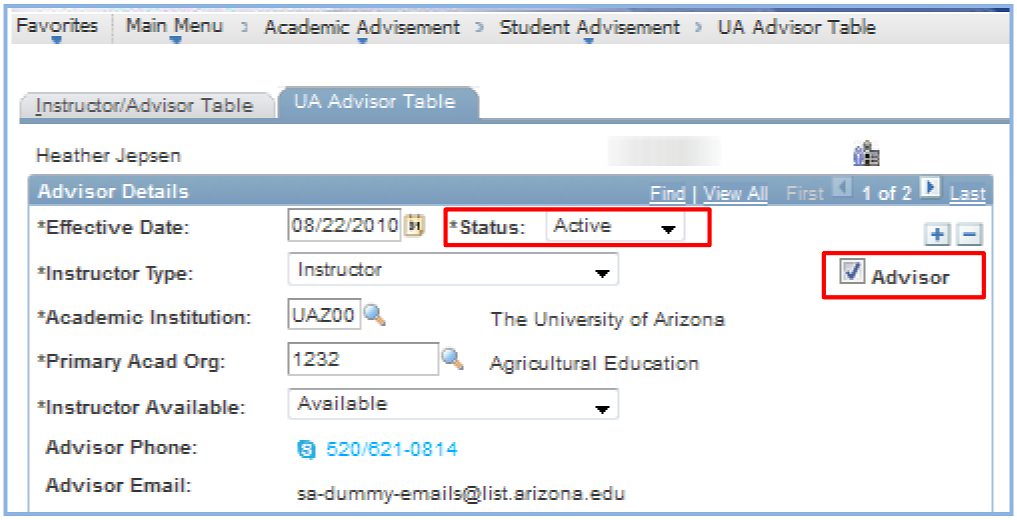


1. Click Correct History
2. Leave Advisor check box blank.
3. Populate Location fields
4. Populate Academic Career and Academic Program fields.
5. Check Advising Coordinator box.
6. Click Save.

Troubleshooting Common Issues:

Below are some common issues that may occur when setting up your Advisor Assignments and how to easily solve them.

1. An advisor is not being assigned to students in UAccess nor are they populated on the ARC website:
   Make sure your advisor's UA Advisor Table is Active and the Advisor check box is populated:



Status should be *Active* and Advisor check box should be populated. This is how the batch process identifies advisors who should be assigned to students in UAccess.

2. Okay, I have confirmed that my advisor's UA Advisor Table is active and I have checked the Advisor box but my advisor is still not being assigned to students in UAccess.
   Changes will appear with the overnight batch process that runs nightly to assign advisors to students. Students who change their major will see their new advisor populated in UAccess after the nightly batch process has successfully completed.

3. My advisor's phone number isn't populating in UAccess/ARC or it's wrong in UAccess/ARC:
   Have your advisor go through UAccess Employee and update their "Work" number. More information on page 17 of this manual.

4. My advisor is not being assigned to second majors. Why is this?
   Make sure your advisor's roles include being assigned to second majors. For example: If your advisor sees all students who are majoring in English, they will need a role where the Academic Plan is equaled to ENGLBA and an additional role for second majors: ENGLBA2.

5. I keep getting emails from students with the subject heading "*From the desk of…*":
   Students have the option of emailing their advisors from UAccess. The emails used are all official University of Arizona addresses and a copy is sent to the student's UA email account.