

Module:	Academic Advisement
Business Process Name:	Advisor Assignments
Created By:	Kristin Eaton
Creation Date:	May 30, 2013
Revised Date:	December 13, 2016

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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.**

UA Advisor Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID:	begins with ▼	<input type="text"/>
Campus ID:	begins with ▼	<input type="text"/>
National ID:	begins with ▼	<input type="text"/>
Last Name:	begins with ▼	<input type="text"/>
First Name:	begins with ▼	<input type="text"/>

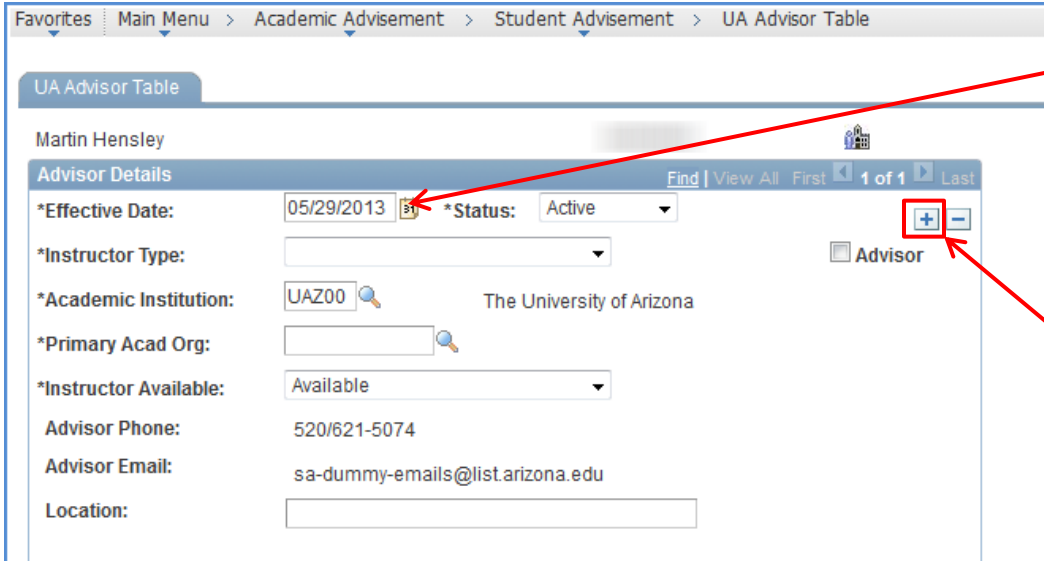
Include History
 Correct History
 Case Sensitive

[Basic Search](#)

Use the search criteria to locate your advisor. Check 'Correct History' box.

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.

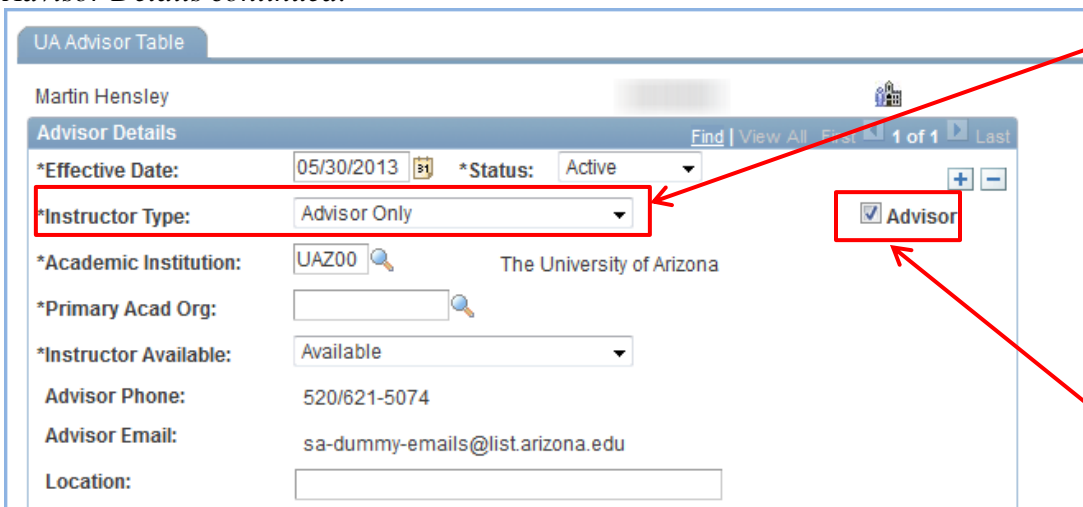
Advisor Details:



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.

Advisor Details continued:



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.

If "Advisor Only" value has been selected, the "Advisor" box to the right will be checked 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:

UA Advisor Table	
Martin Hensley	
Advisor Details Find 	
*Effective Date:	05/31/2013 *Status: Active
*Instructor Type:	Advisor Only
*Academic Institution:	UAZ00 The University of Arizona
*Primary Acad Org:	UNIV The University of Arizona
*Instructor Available:	Available
Advisor Phone:	520/621-5074
Advisor Email:	sa-dummy-emails@list.arizona.edu
Location:	

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:

UA Advisor Table	
Martin Hensley Find View All First 1 of 1 Last	
Advisor Details + -	
*Effective Date:	05/30/2013 *Status: Active
*Instructor Type:	Advisor Only Advisor
*Academic Institution:	UAZ00 The University of Arizona
*Primary Acad Org:	UNIV The University of Arizona
*Instructor Available:	Available
Advisor Phone:	520/621-5074
Advisor Email:	sa-dummy-emails@list.arizona.edu
Location:	

'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:

UA Advisor Table																																	
Martin Hensley																																	
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Advisor Details Find View All First 1 of 1 Last </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">*Effective Date:</td> <td style="width: 20%;">05/30/2013</td> <td style="width: 20%;">*Status:</td> <td style="width: 40%;">Active</td> </tr> <tr> <td>*Instructor Type:</td> <td>Advisor Only</td> <td colspan="2" style="text-align: right;"><input checked="" type="checkbox"/> Advisor</td> </tr> <tr> <td>*Academic Institution:</td> <td>UAZ00</td> <td colspan="2">The University of Arizona</td> </tr> <tr> <td>*Primary Acad Org:</td> <td>UNIV</td> <td colspan="2">The University of Arizona</td> </tr> <tr> <td>*Instructor Available:</td> <td colspan="3">Available</td> </tr> <tr> <td>Advisor Phone:</td> <td colspan="3">520/621-5074</td> </tr> <tr> <td>Advisor Email:</td> <td colspan="3">sa-dummy-emails@list.arizona.edu</td> </tr> <tr> <td style="border: 2px solid red;">Location:</td> <td colspan="3" style="border: 2px solid red;">Louisville Building, Room HZA 4</td> </tr> </table> </div>		*Effective Date:	05/30/2013	*Status:	Active	*Instructor Type:	Advisor Only	<input checked="" type="checkbox"/> Advisor		*Academic Institution:	UAZ00	The University of Arizona		*Primary Acad Org:	UNIV	The University of Arizona		*Instructor Available:	Available			Advisor Phone:	520/621-5074			Advisor Email:	sa-dummy-emails@list.arizona.edu			Location:	Louisville Building, Room HZA 4		
*Effective Date:	05/30/2013	*Status:	Active																														
*Instructor Type:	Advisor Only	<input checked="" type="checkbox"/> Advisor																															
*Academic Institution:	UAZ00	The University of Arizona																															
*Primary Acad Org:	UNIV	The University of Arizona																															
*Instructor Available:	Available																																
Advisor Phone:	520/621-5074																																
Advisor Email:	sa-dummy-emails@list.arizona.edu																																
Location:	Louisville Building, Room HZA 4																																

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

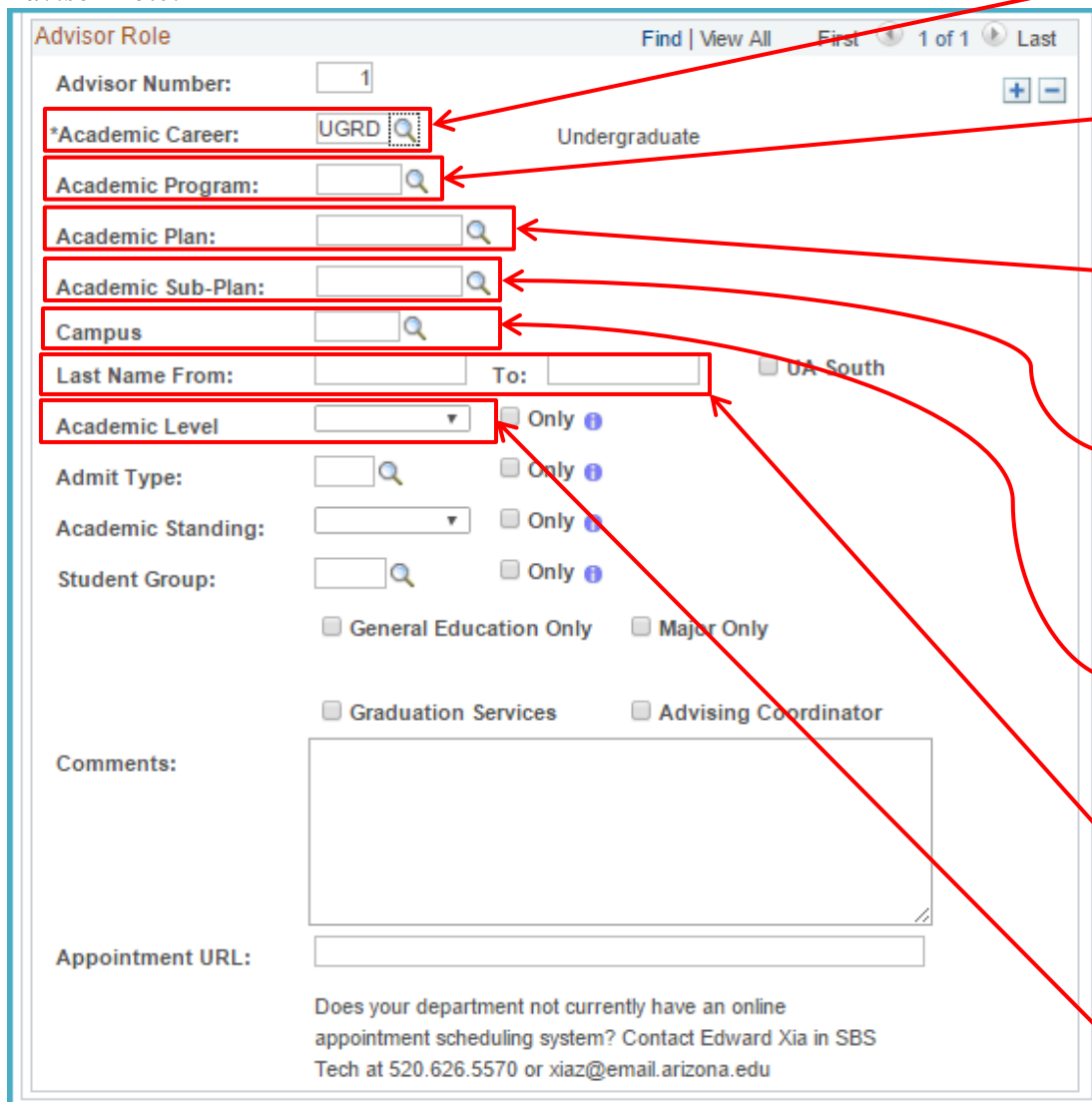
Congratulations. You have successfully completed the *Advisor Details* section of the table! Now, let's move on to the *Advisor Role* section.

Advisor Role

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:



The screenshot shows the 'Advisor Role' configuration interface. Fields highlighted with red boxes include:

- Advisor Number: 1
- *Academic Career: UGRD (Undergraduate)
- Academic Program: [Searchable]
- Academic Plan: [Searchable]
- Academic Sub-Plan: [Searchable]
- Campus: [Searchable]
- Last Name From: [Searchable] To: [Searchable]
- Academic Level: [Dropdown]
- Admit Type: [Searchable]
- Academic Standing: [Dropdown]
- Student Group: [Searchable]
- General Education Only, Major Only, Graduation Services, Advising Coordinator (checkboxes)
- Appointment URL: [Text Field]

 Red arrows point from these fields to explanatory text boxes on the right side of the page.

Academic Career should **always** be populated with *UGRD*.

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

**** Academic Plan** provides all major, major 2, and m

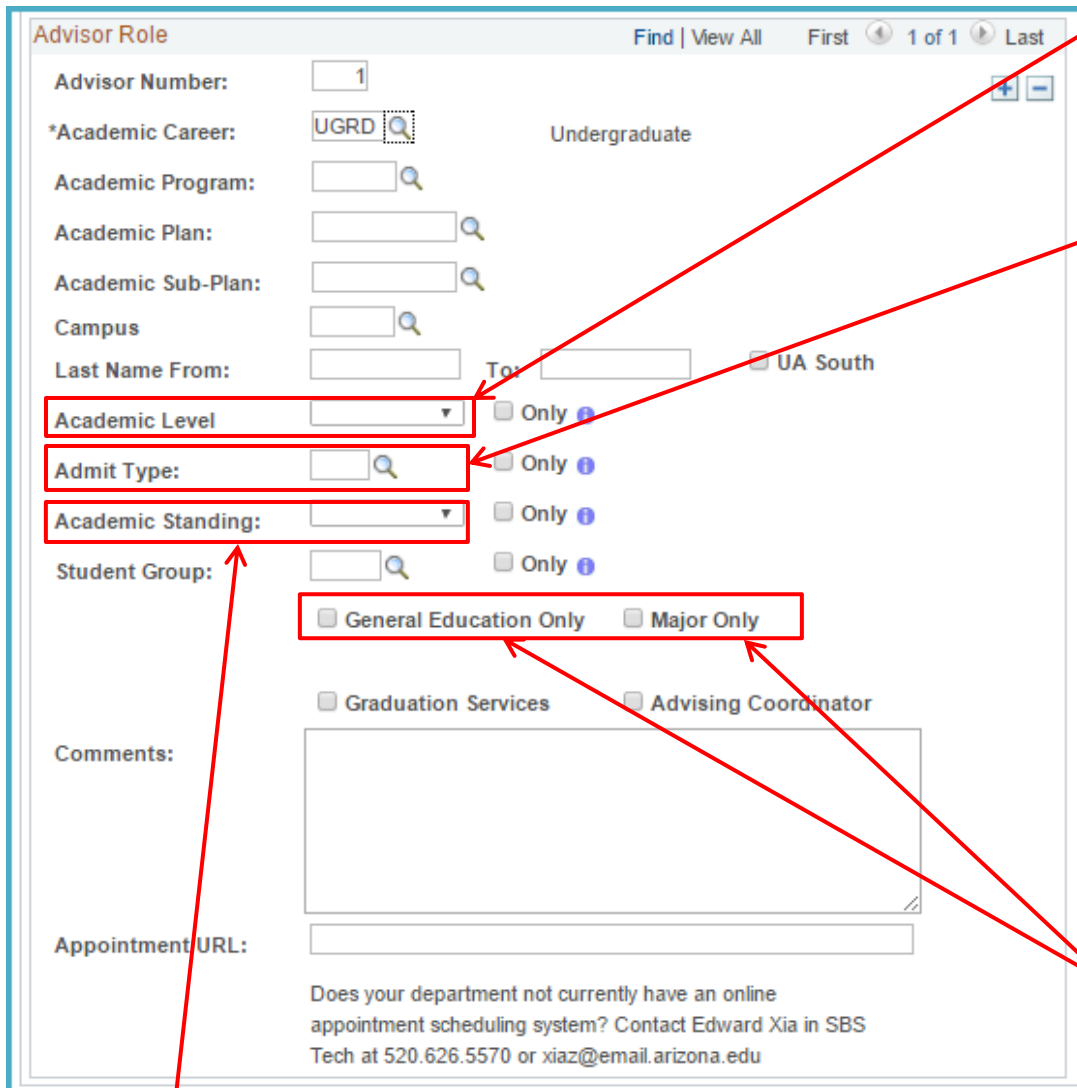
If your major has an *Academic Sub-Plan* and the advising roles are broken out by this value, you may select your sub-plan value here.

If advising roles are broken out by Campus, define 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:

Advisor Role Find | View All First 1 of 1 Last

Advisor Number:

*Academic Career: Undergraduate

Academic Program:

Academic Plan:

Academic Sub-Plan:

Campus:

Last Name From: To: UA South

Academic Level: Only ⓘ

Admit Type: Only ⓘ

Academic Standing: Only ⓘ

Student Group: Only ⓘ

General Education Only Major Only

Graduation Services Advising Coordinator

Comments:

Appointment URL:

Does your department not currently have an online appointment scheduling system? Contact Edward Xia in SBS Tech at 520.626.5570 or xiaz@email.arizona.edu

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:

Advisor Role
Find | View All
First 1 of 1 Last

Advisor Number: + -

*Academic Career: Undergraduate

Academic Program: 🔍

Academic Plan: 🔍

Academic Sub-Plan: 🔍

Campus: 🔍

Last Name From: To: UA South

Academic Level: Only ℹ️

Admit Type: 🔍 Only ℹ️

Academic Standing: 🔍 Only ℹ️

Student Group: 🔍 Only ℹ️

General Education Only Major Only
 Graduation Services Advising Coordinator

Comments:

Appointment URL:

Does your department not currently have an online appointment scheduling system? Contact Edward Xia in SBS Tech at 520.626.5570 or xiaz@email.arizona.edu

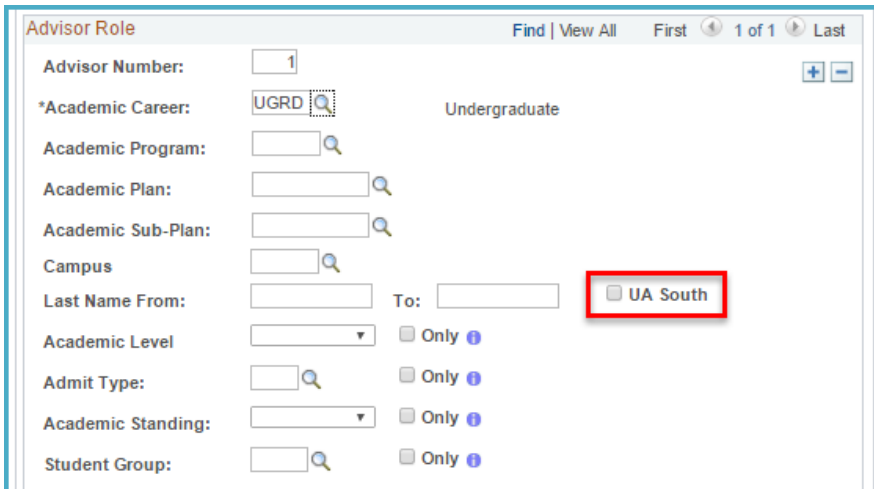
The *Comments* box may be used to provide a short message to the students. The message appears to students in Student Services Center on the *My Advisor* page. This message is currently limited to 254 characters and is not necessary to populate, although helpful to students.

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:

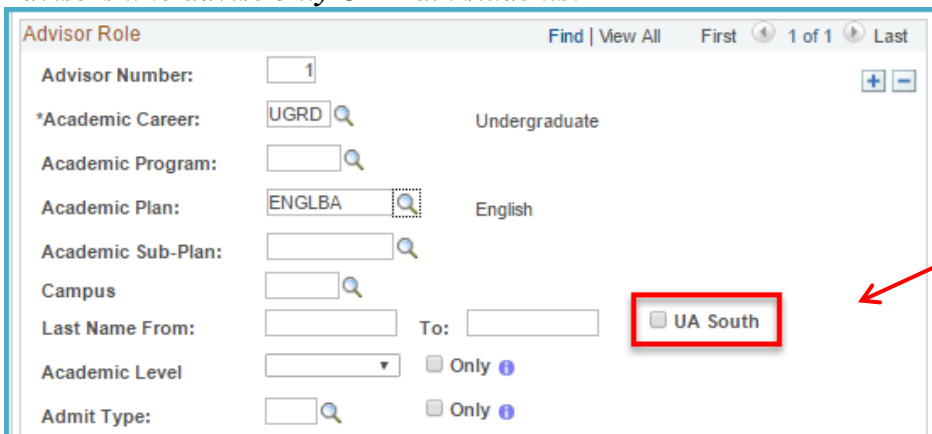
There are some academic plans that exist on both UA Main and South campuses and each have their own respective advisors. However, there may be some special advising areas whom advise both UA Main and South students. The UA South check box helps the assignment process to determine whether or not to include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



The screenshot shows the 'Advisor Role' form with the following fields: Advisor Number (1), Academic Career (UGRD - Undergraduate), Academic Program, Academic Plan, Academic Sub-Plan, Campus, Last Name From, To, Academic Level, Admit Type, Academic Standing, and Student Group. The 'UA South' checkbox is checked and highlighted with a red box.

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

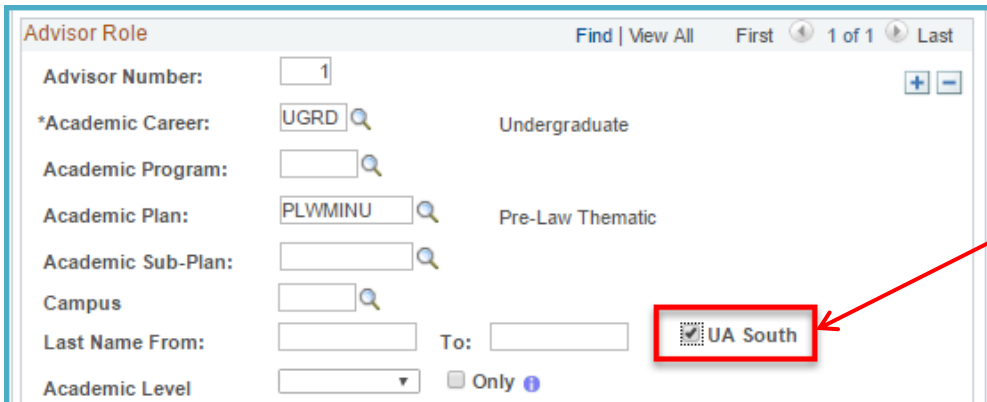
*Advisors who advise **only** UA Main students:*



The screenshot shows the 'Advisor Role' form with the following fields: Advisor Number (1), Academic Career (UGRD - Undergraduate), Academic Program, Academic Plan (ENGLBA - English), Academic Sub-Plan, Campus, Last Name From, To, Academic Level, Admit Type, and Student Group. The 'UA South' checkbox is unchecked and highlighted with a red box.

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

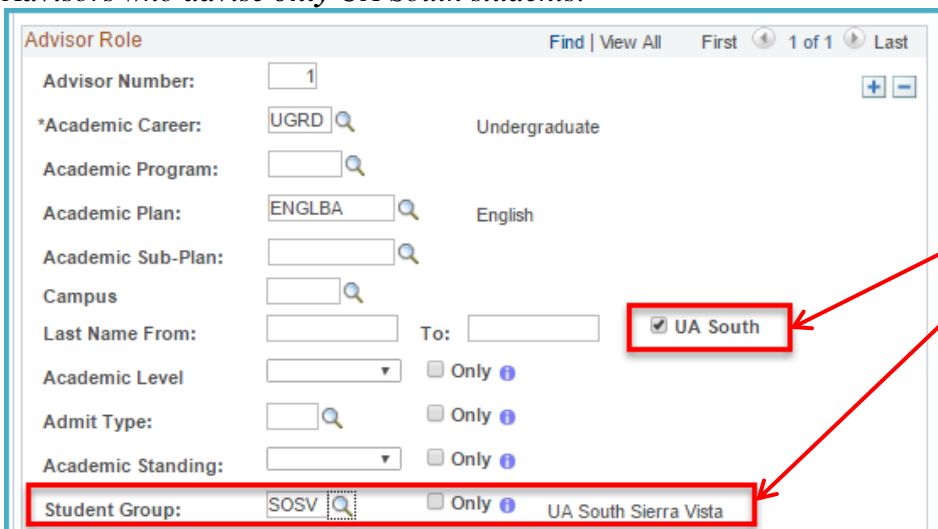
Advisors who advise **both** UA Main and **all** South students:



The screenshot shows the 'Advisor Role' form with the following fields: Advisor Number (1), *Academic Career (UGRD - Undergraduate), Academic Program (empty), Academic Plan (PLWMINU - Pre-Law Thematic), Academic Sub-Plan (empty), Campus (empty), Last Name From (empty) To (empty), and Academic Level (dropdown). The 'UA South' checkbox is checked and highlighted with a red box.

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

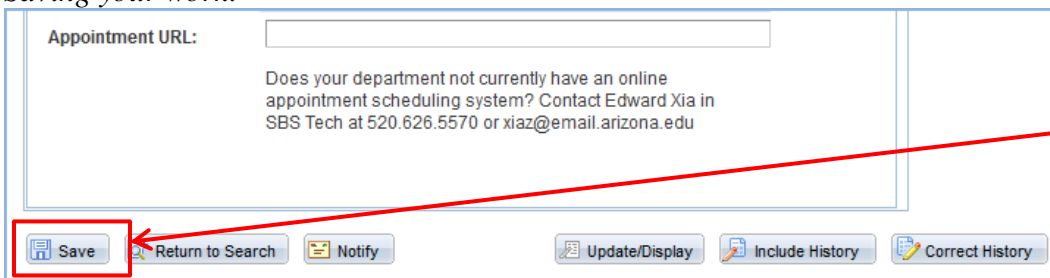
Advisors who advise **only** UA South students:



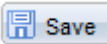
The screenshot shows the 'Advisor Role' form with the following fields: Advisor Number (1), *Academic Career (UGRD - Undergraduate), Academic Program (empty), Academic Plan (ENGLBA - English), Academic Sub-Plan (empty), Campus (empty), Last Name From (empty) To (empty), Academic Level (dropdown), Admit Type (dropdown), Academic Standing (dropdown), and Student Group (SOSV - UA South Sierra Vista). Both the 'UA South' checkbox and the 'SOSV' Student Group field are highlighted with red boxes.

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:

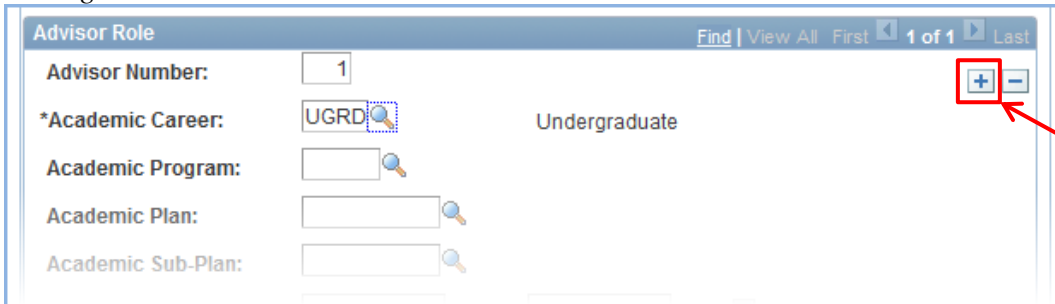


The screenshot shows the 'Appointment URL' form with a text area containing the question: 'Does your department not currently have an online appointment scheduling system? Contact Edward Xia in SBS Tech at 520.626.5570 or xiaz@email.arizona.edu'. At the bottom, the 'Save' button is highlighted with a red box.

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

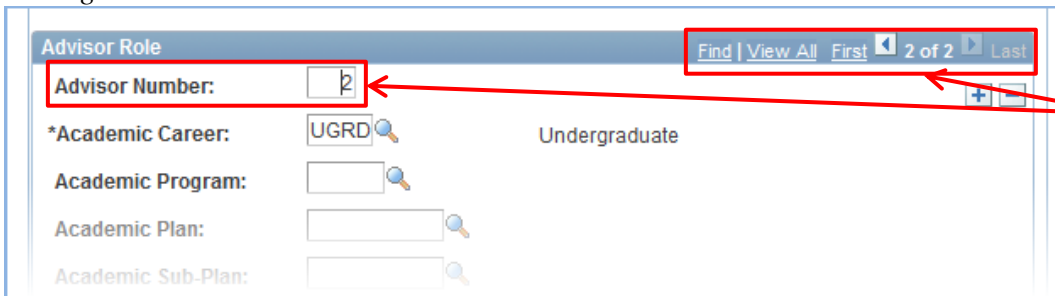
Creating additional rows:

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 preceding rows.

Adding rows continued:



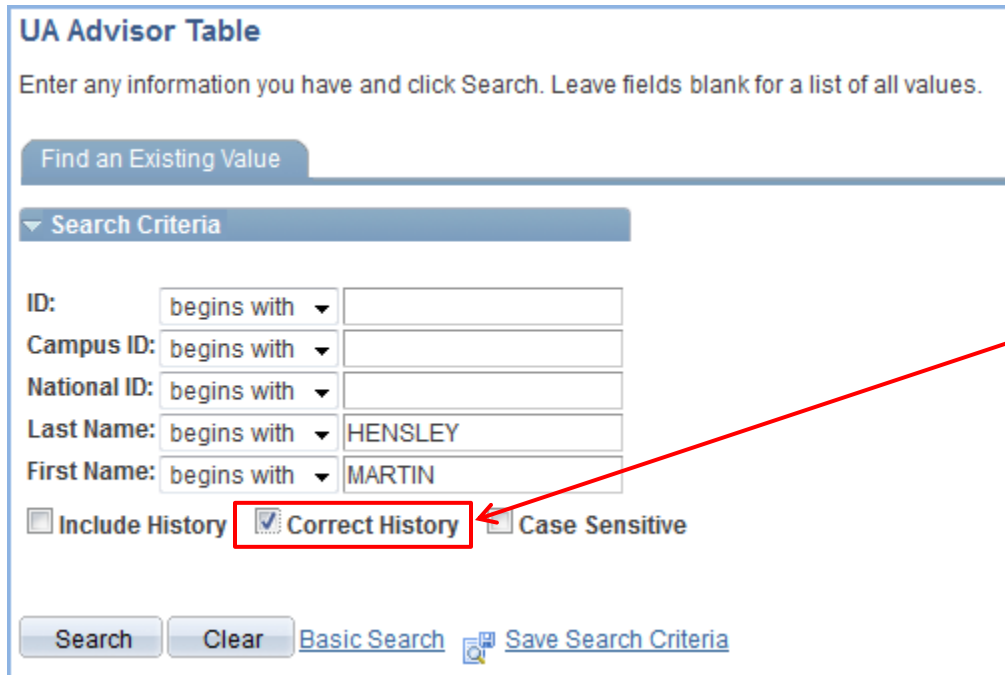
When a new row is added in the *Advisor Role* section, we it added within the heading and *Advisor Number* field.

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:



UA Advisor Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID: begins with []

Campus ID: begins with []

National ID: begins with []

Last Name: begins with [HENSLEY]

First Name: begins with [MARTIN]

Include History **Correct History** Case Sensitive

Search Clear Basic Search Save Search Criteria

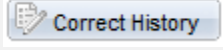
From the *Search Criteria*, click **Correct History** and then .

From the UA Advisor Table:

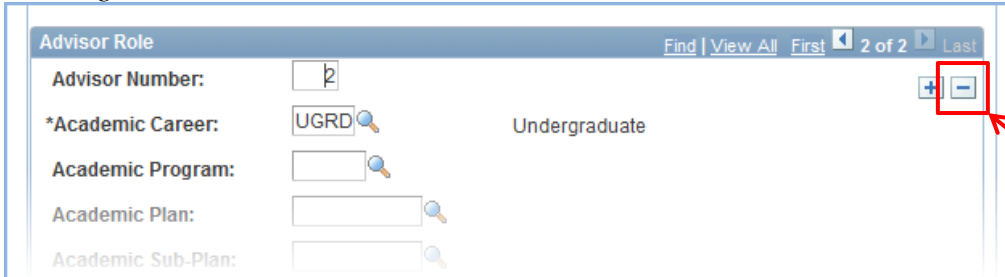


Save Return to Search Notify Update/Display Include History **Correct History**

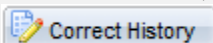

Click . Once you do this, the button will gray-out, letting you know that you are in correction mode:



Deleting a row:

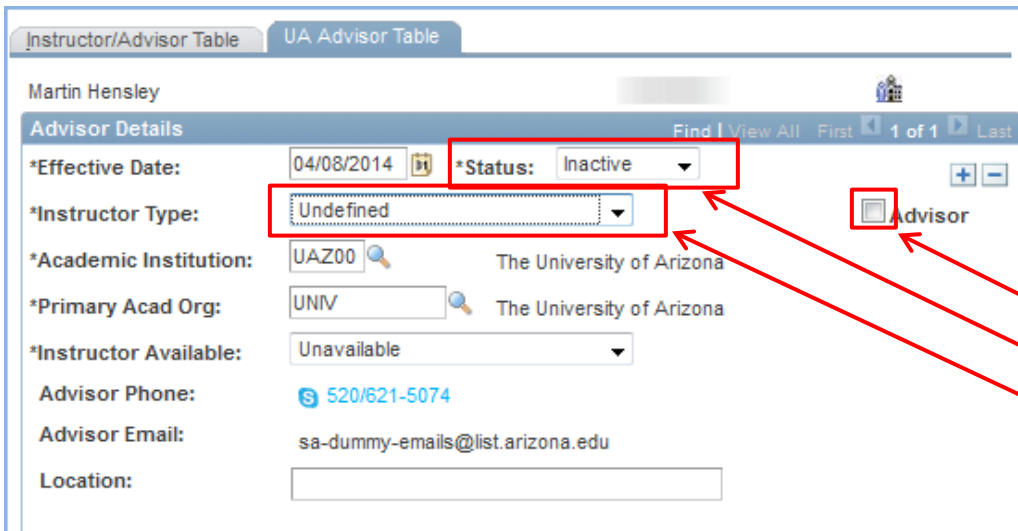


The screenshot shows the 'Advisor Role' form. At the top right, there are navigation buttons: '+', '-', and 'Last'. The minus button is highlighted with a red box. Below the navigation buttons, the form contains several fields: 'Advisor Number' (with a search icon), '*Academic Career' (set to 'UGRD'), 'Academic Program', 'Academic Plan', and 'Academic Sub-Plan'. The text 'Undergraduate' is displayed on the right side of the form.

To delete a row, click  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.

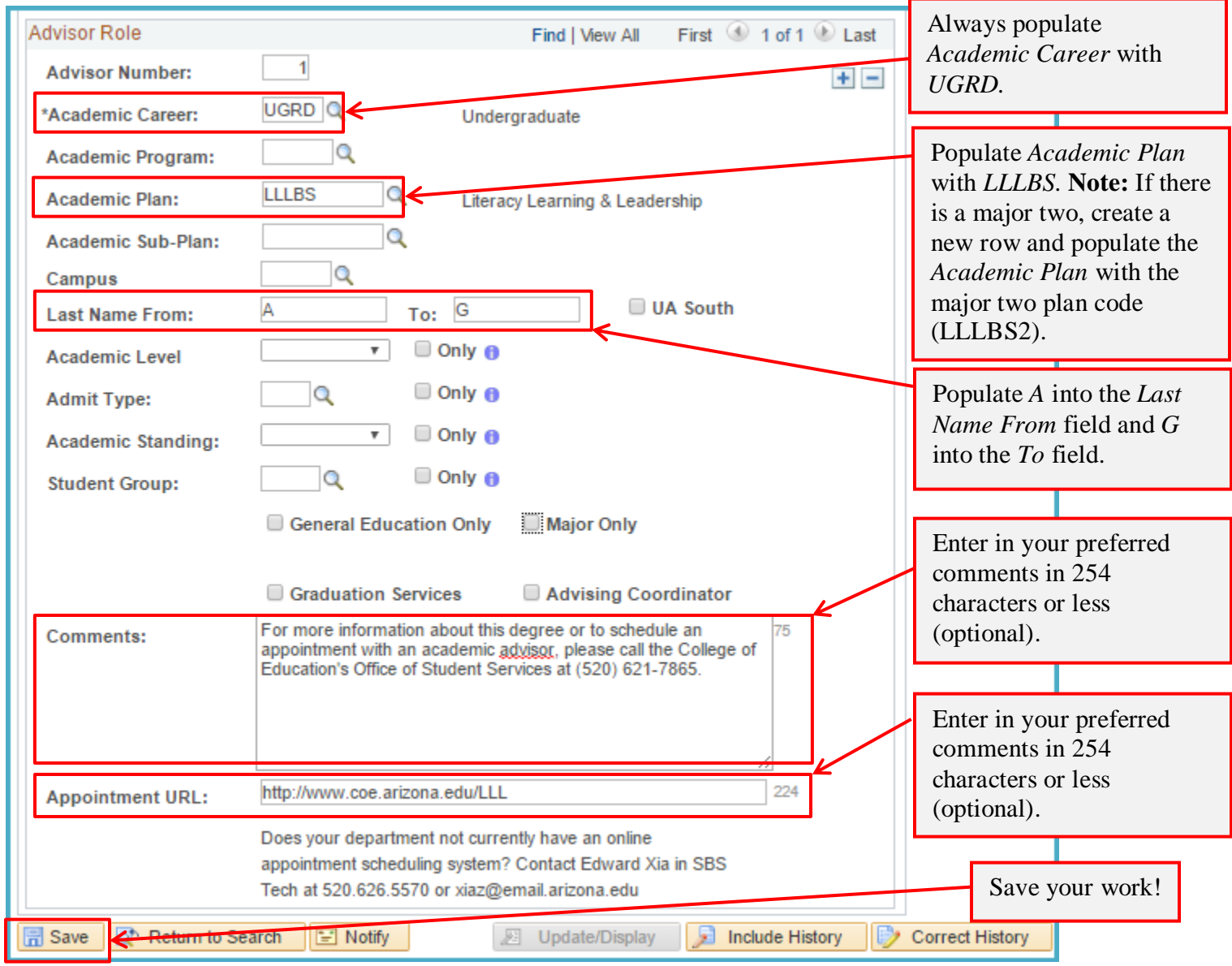


The screenshot shows the 'UA Advisor Table' form for 'Martin Hensley'. The form includes fields for '*Effective Date' (04/08/2014), '*Status' (Inactive), '*Instructor Type' (Undefined), '*Academic Institution' (UAZ00 - The University of Arizona), '*Primary Acad Org' (UNIV - The University of Arizona), '*Instructor Available' (Unavailable), 'Advisor Phone' (520/621-5074), 'Advisor Email' (sa-dummy-emails@list.arizona.edu), and 'Location'. The 'Status' dropdown, 'Instructor Type' dropdown, and the 'Advisor' checkbox are all highlighted with red boxes.

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:



The screenshot shows the 'Advisor Role' form in UAccess. Red boxes highlight specific fields, with arrows pointing to callout boxes containing instructions:

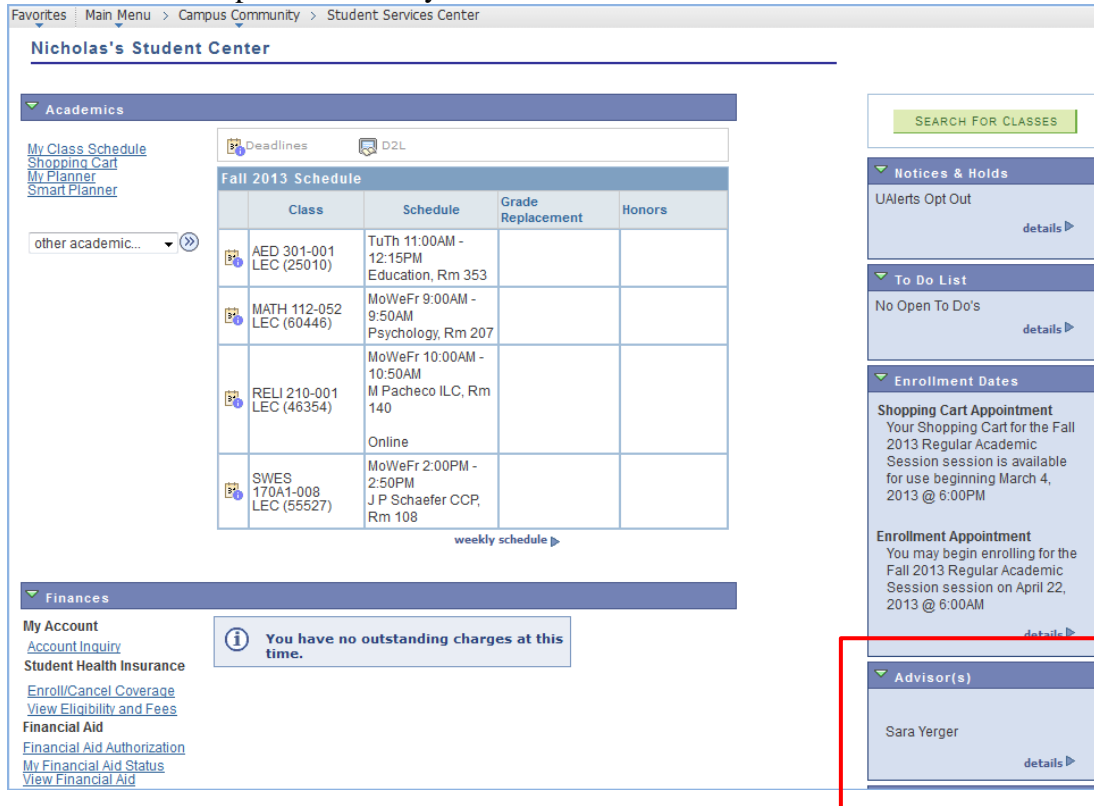
- *Academic Career:** UGRD (Undergraduate). Callout: "Always populate *Academic Career* with UGRD."
- Academic Plan:** LLLBS (Literacy Learning & Leadership). Callout: "Populate *Academic Plan* with LLLBS. **Note:** If there is a major two, create a new row and populate the *Academic Plan* with the major two plan code (LLLBS2)."
- Last Name From:** A, **To:** G. Callout: "Populate A into the *Last Name From* field and G into the *To* field."
- Comments:** For more information about this degree or to schedule an appointment with an academic advisor, please call the College of Education's Office of Student Services at (520) 621-7865. Callout: "Enter in your preferred comments in 254 characters or less (optional)."
- Appointment URL:** http://www.coe.arizona.edu/LLL. Callout: "Enter in your preferred comments in 254 characters or less (optional)."
- Save button:** Callout: "Save your work!"

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:



Nicholas's Student Center

Academics

My Class Schedule
Shopping Cart
My Planner
Smart Planner

other academic... ▾

Deadlines D2L

Class	Schedule	Grade Replacement	Honors
AED 301-001 LEC (25010)	TuTh 11:00AM - 12:15PM Education, Rm 353		
MATH 112-052 LEC (60446)	MoWeFr 9:00AM - 9:50AM Psychology, Rm 207		
RELI 210-001 LEC (46354)	MoWeFr 10:00AM - 10:50AM M Pacheco ILC, Rm 140 Online		
SWES 170A1-008 LEC (55527)	MoWeFr 2:00PM - 2:50PM J P Schaefer CCP, Rm 108		

weekly schedule ▶

Finances

My Account
Account Inquiry
Student Health Insurance
Enroll/Cancel Coverage
View Eligibility and Fees
Financial Aid
Financial Aid Authorization
My Financial Aid Status
View Financial Aid

You have no outstanding charges at this time.

SEARCH FOR CLASSES

Notices & Holds
UAlerts Opt Out details ▶

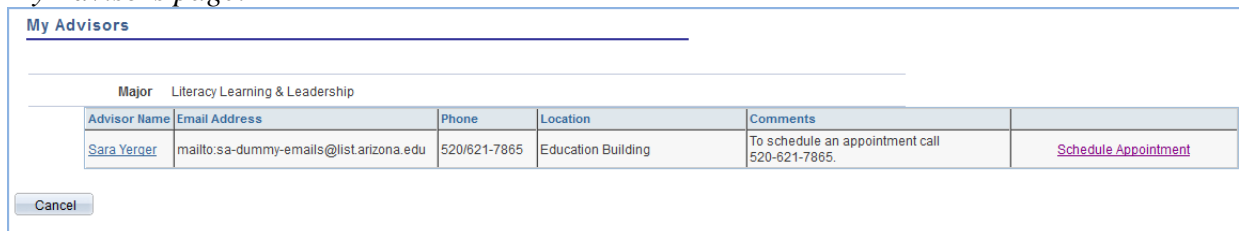
To Do List
No Open To Do's details ▶

Enrollment Dates
Shopping Cart Appointment
Your Shopping Cart for the Fall 2013 Regular Academic Session session is available for use beginning March 4, 2013 @ 6:00PM
Enrollment Appointment
You may begin enrolling for the Fall 2013 Regular Academic Session session on April 22, 2013 @ 6:00PM details ▶

Advisor(s)
Sara Yerger details ▶

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

My Advisors page:



My Advisors

Major Literacy Learning & Leadership

Advisor Name	Email Address	Phone	Location	Comments
Sara Yerger	mailto:sa-dummy-emails@list.arizona.edu	520/621-7865	Education Building	To schedule an appointment call 520-621-7865.

Cancel

[Schedule Appointment](#)

Via Query Viewer:

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

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to HTML	Schedule	Remove
UA_AA_ADVISEE_LIST	Advisees by Advisor	Public		HTML	Excel	HTML	Schedule	-

Click on *HTML*.

UA_AA_ADVISEE_LIST - Advisees by Advisor

Advisor's ID:

Enter your Advisor's EMPLID and click *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		sa-dummy-emails@list.arizona.edu
2	del		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	ELE MBAED	sa-dummy-emails@list.arizona.edu
7	Jennifer N		Yerger,Sara M	UGRD	ELE MBAED	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	ELE MBAED	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	,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	,Brianna Alicia		Yerger,Sara M	UGRD	PREDND	sa-dummy-emails@list.arizona.edu

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*



The screenshot shows the 'Phone Numbers' page for Kristin Eaton. The breadcrumb trail is: Favorites | Main Menu > Self Service > Personal Information > Phone Numbers. The page title is 'Phone Numbers' and the user name is 'Kristin Eaton'. Below the name, it says 'Enter your phone numbers below.' There is a table with the following data:

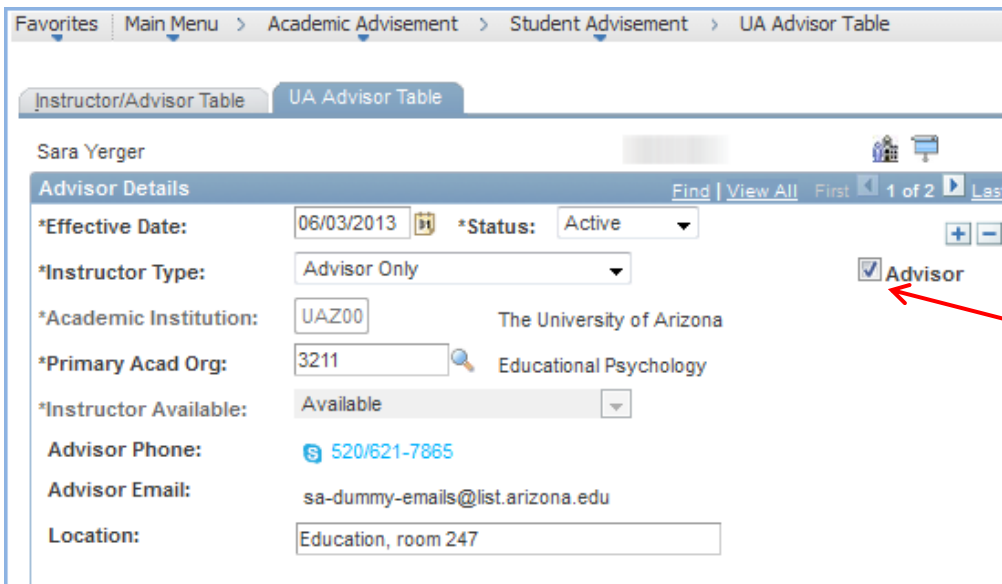
Phone Type	*Telephone	Extension	Preferred	
Home	315/783-2397		<input type="checkbox"/>	Delete
Work	520/621-7466		<input checked="" type="checkbox"/>	Delete

Below the table is an 'Add a Phone Number' button. At the bottom, there is a '* Required Field' label and a 'Save' button.

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.




Favorites | Main Menu > Academic Advisement > Student Advisement > UA Advisor Table
 Instructor/Advisor Table | UA Advisor Table
 Sara Yerger
 Advisor Details Find | View All First 1 of 2 Last
 *Effective Date: 06/03/2013 *Status: Active
 *Instructor Type: Advisor Only Advisor
 *Academic Institution: UAZ00 The University of Arizona
 *Primary Acad Org: 3211 Educational Psychology
 *Instructor Available: Available
 Advisor Phone: 520/621-7865
 Advisor Email: sa-dummy-emails@list.arizona.edu
 Location: Education, room 247

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:

COLLEGE OF ENGINEERING

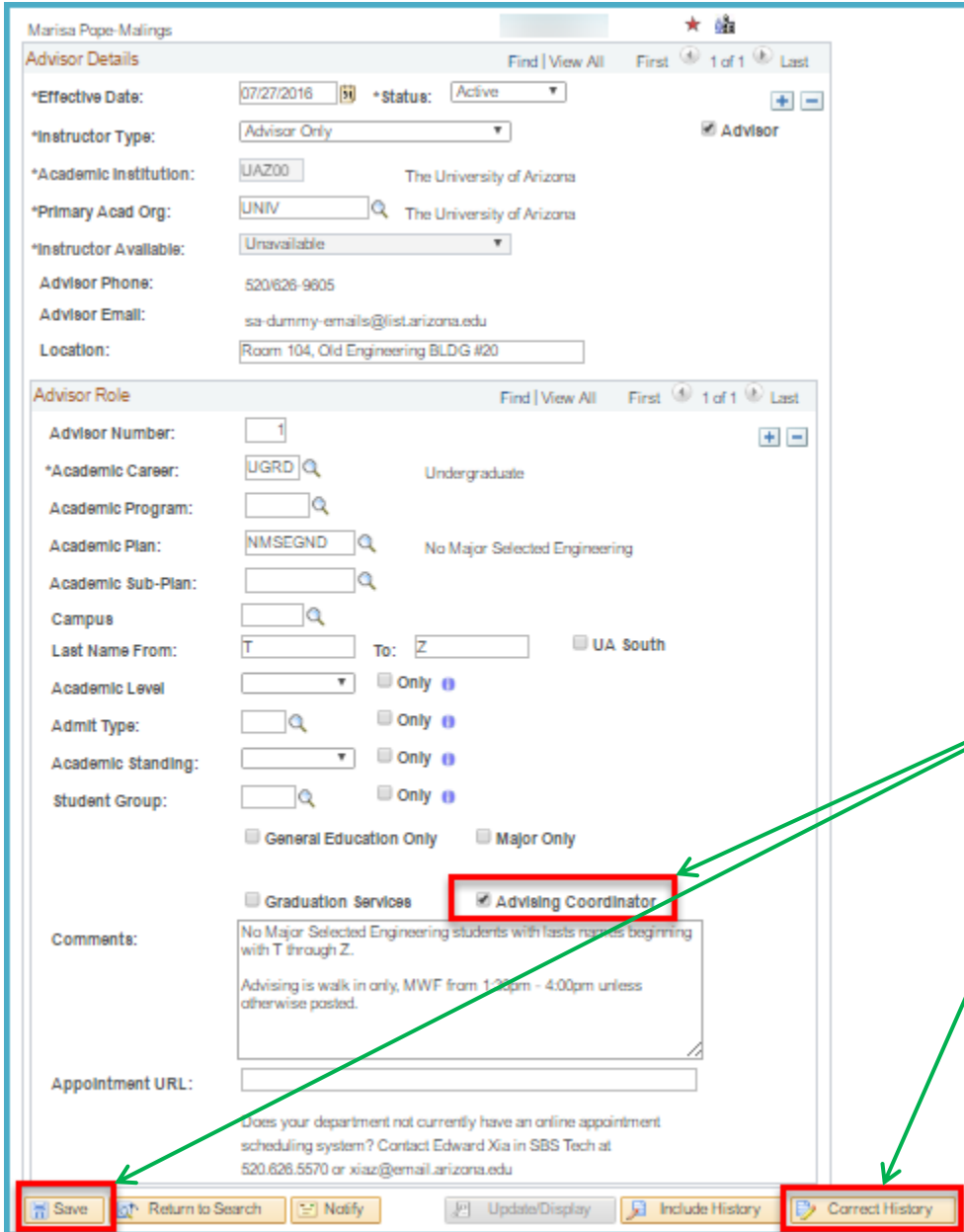


Website: College website
 Phone: (520) 621-6032
 Fax: (520) 621-9995
 Engineering Bldg.
 PO Box: 210020
 Engineering Advising Center - Room 104
 • Joanne E Silva
 Room 104, Engineering bldg. #20
 (520) 626-9605
 silvaj@email.arizona.edu

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:

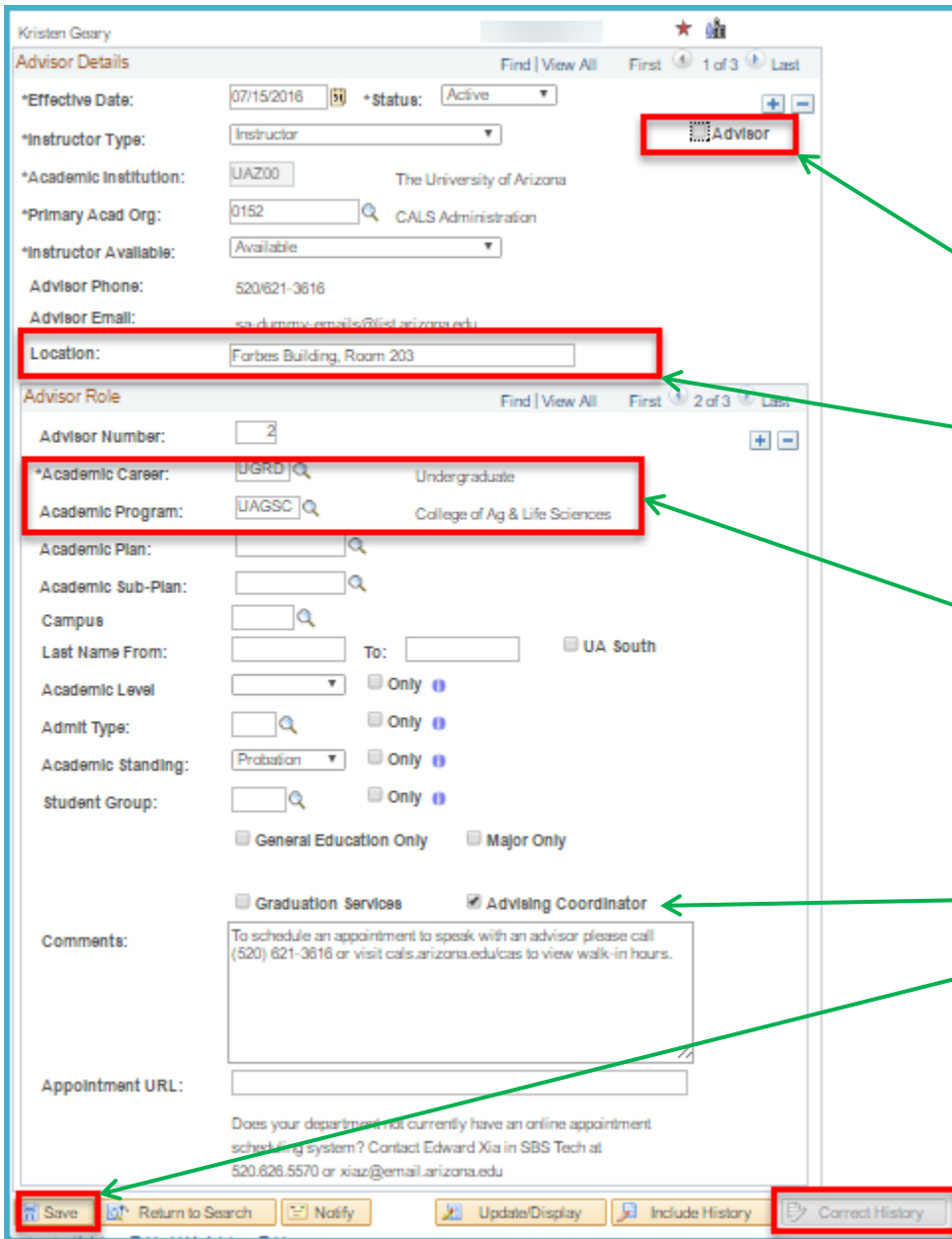


The screenshot displays the 'Advisor Details' and 'Advisor Role' sections of the UAccess system. In the 'Advisor Role' section, the 'Advising Coordinator' checkbox is checked and highlighted with a red box. At the bottom of the form, the 'Save' and 'Correct History' buttons are also highlighted with red boxes. Green arrows point from a text box on the right to these elements.

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:



Advisor Details

*Effective Date: 07/15/2016 *status: Active

*Instructor Type: Instructor

*Academic Institution: UAZ000 The University of Arizona

*Primary Acad Org: 0152 CALS Administration

*Instructor Available: Available

Advisor Phone: 520/621-3616

Advisor Email: sa.kgeary_email@list.arizona.edu

Location: Forbes Building, Room 203

Advisor Role

Advisor Number: 2

*Academic Career: UGRD Undergraduate

Academic Program: UAGSC College of Ag & Life Sciences

Academic Plan: []

Academic Sub-Plan: []

Campus: []

Last Name From: [] To: [] UA South

Academic Level: [] Only

Admit Type: [] Only

Academic Standing: Probation Only

Student Group: [] Only

General Education Only Major Only

Graduation Services Advising Coordinator

Comments: To schedule an appointment to speak with an advisor please call (520) 621-3616 or visit cals.arizona.edu/cas to view walk-in hours.

Appointment URL: []

Does your department not currently have an online appointment scheduling system? Contact Edward Xia in SBS Tech at 520.626.5570 or xiaz@email.arizona.edu

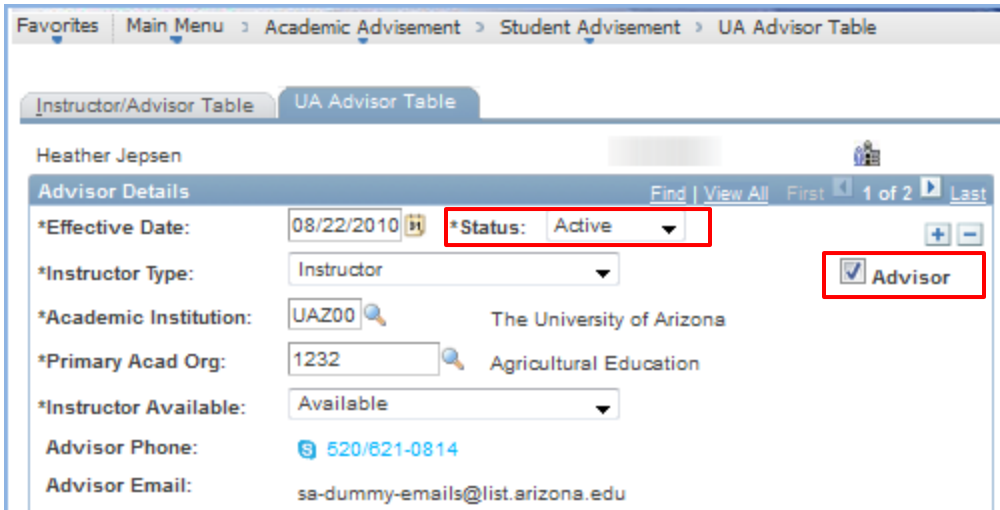
Buttons: Save, Return to Search, Notify, Update/Display, Include History, Correct History

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:



The screenshot shows the 'UA Advisor Table' for Heather Jepsen. The 'Advisor Details' section includes the following information:

- *Effective Date: 08/22/2010
- *Status: Active (highlighted with a red box)
- *Instructor Type: Instructor
- *Academic Institution: UAZ00 The University of Arizona
- *Primary Acad Org: 1232 Agricultural Education
- *Instructor Available: Available
- Advisor Phone: 520/621-0814
- Advisor Email: sa-dummy-emails@list.arizona.edu

The 'Advisor' checkbox is checked and highlighted with a red box.

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.