

Student Advisor Update: Update or delete in batch

OBJECTIVE: Add, delete, or swap advisors using a file or query

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NEED ADDITIONAL INFORMATION?

For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/it/cms/contact.html> to locate the **Academic Advising FUNCTIONAL LEAD.**

Introduction

An Advisor can be assigned to any student in PeopleSoft. This Advisor will display in the My SSU Student Center for a student to see whenever they login. When an advisor logs into My SSU, a list of their “Advisees” will display in the Advisor Center. Additionally, departments can run reports to find out how many students are assigned to a particular advisor.

You can navigate to Records and Enrollment > Student Background Information > Student Advisor to see if a student currently has an advisor assigned. On that page, you can add a new advisor. You may or may not be able to remove an already assigned advisor, depending on your security.

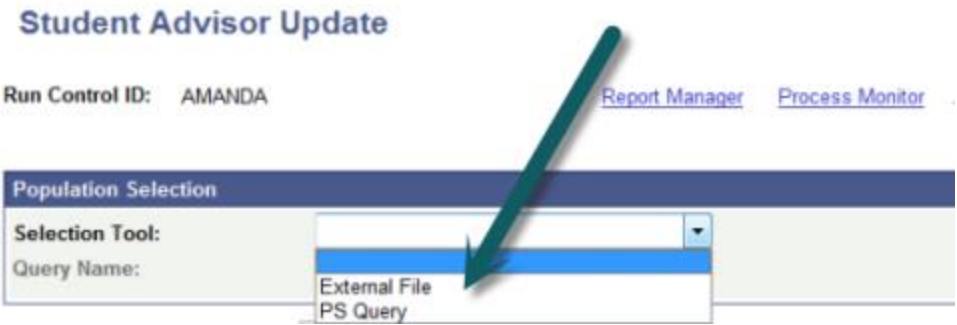
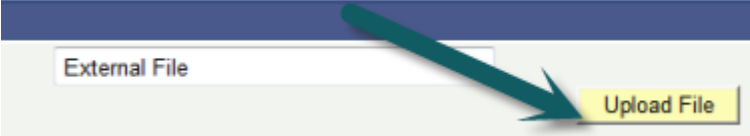
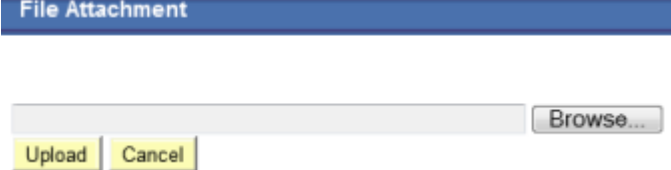
Using this batch process will enable you to update more than one student at a time. You can run reports to find students that have left your major, and remove the advisors associated with those students. This process will also enable you to remove an advisor from a large amount of students in a case where the advisor has left SSU, or is on leave.



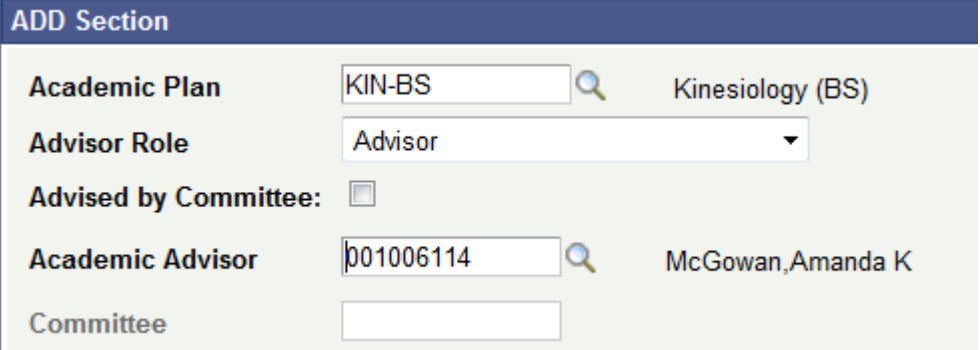
Another feature within this process is a “Swap”. If you have an advisor that will be taking on the advising load for someone else while they are on leave, you can swap all of their advisees over to them. You can then perform the swap again once the original advisor returns to campus.

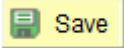
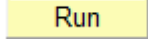
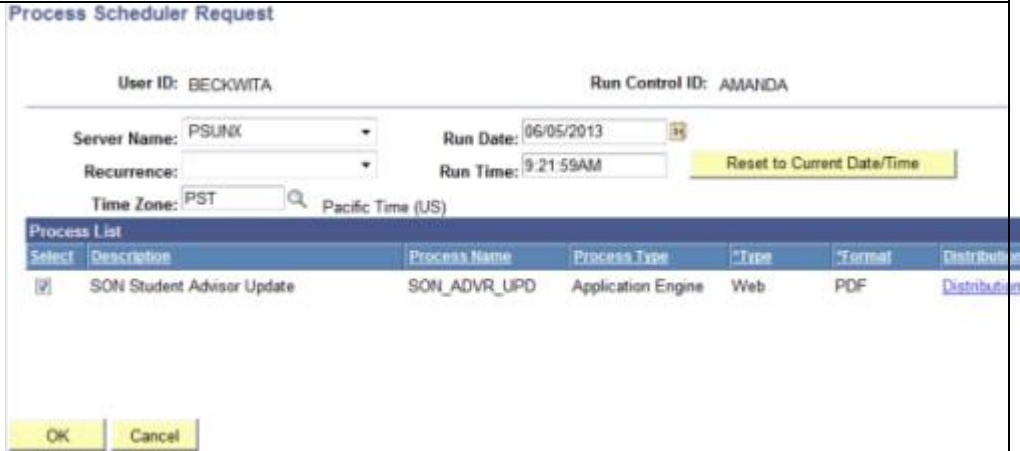

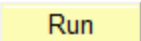
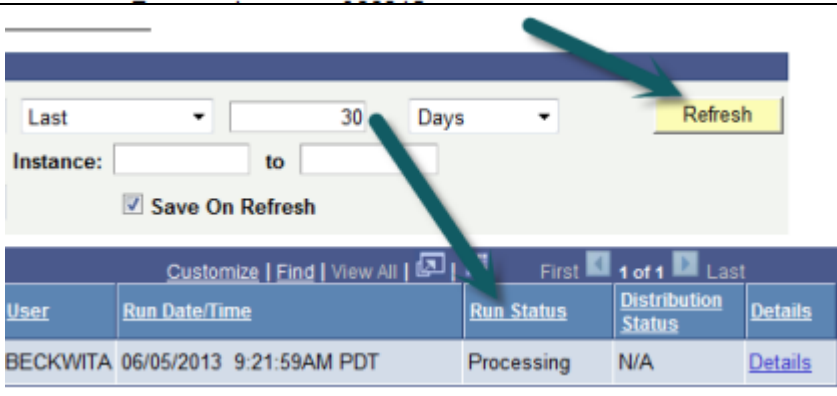
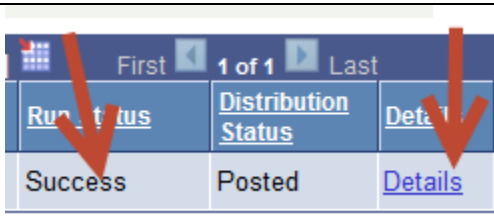
And finally, one of the best features of this process is that we no longer lose the historical data of what advisor was assigned to a student when a “delete” is processed via this modification. If you delete an advisor from the regular “Student Advisor” page in MySSU, all history is lost. There is no longer any record that the student had an advisor assigned. When this process deletes, it inserts a “NONE” record with a new effective date. We would then be able to see that the student used to have an advisor assigned, or use this data to query from.

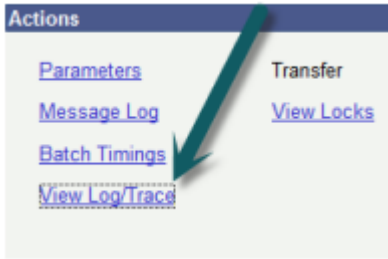
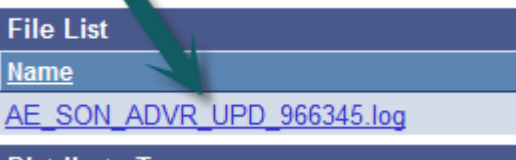
Lesson 1: Add an Advisor to a batch of students – using a FILE

Navigation: SON Customizations > SON Campus Solutions > Advising > Process > Student Advisor Update

| | Action | Screenshot |
|----|---|--|
| 1 | Navigate to the Student Advisor Update (see above navigation) | Note: If you have not yet created a run control for this process, add a new value called Student Advisor Update before you proceed to step 2. |
| 2 | Selection Tool: External File (skip to lesson 2 if you want to use a query) |  |
| 3a | Get your file ready | If you have your list of student ID's, save them into a .txt file with no other information saved into the file (any other information like headers should be deleted from the excel file so only emplids go into the .txt file) |
| 3b | Click on Upload File |  |
| 3c | Click on Browse to find the .txt file you've created with the list of emplids, and select your file |  |

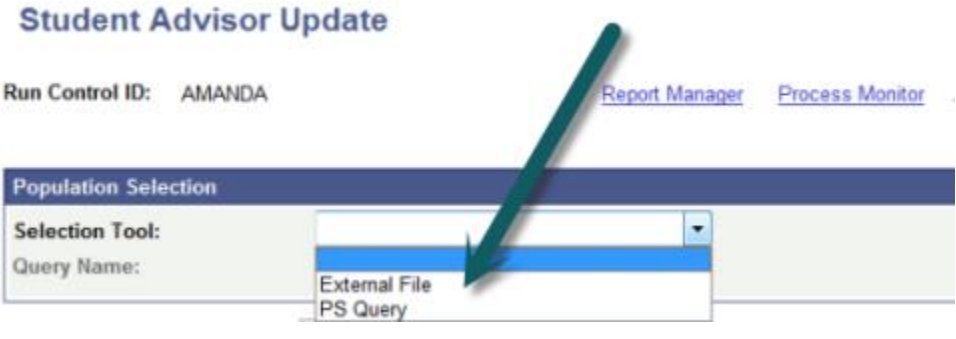

| | | |
|----|---|---|
| 3d | Click on the magnifying glass to the right of the file mapping box |  |
| 3e | On the 'Look up File Mapping' page, click on 'SON STUDENT ADVISOR UPDATE' |  |
| 4 | <p>Enter Academic Career</p> <p>Enter Academic Program</p> | <p>*Academic Institution: SOCMP Sonoma State University</p> <p>Effective Date: 06/05/2013</p> <p>*Academic Career: UGRD Undergraduate</p> <p>*Academic Program: UGRD Undergraduate</p> <p>Note: You will need to process UGRD and PBAC separately if you are working with a mix of different Career/program students.</p> |
| 5 | <p><u>ADD Section:</u> Academic Plan: Advisor Role: Academic Advisor <i>OR</i> Committee (if advised by committee, check the box before selecting your committee)</p> |  |


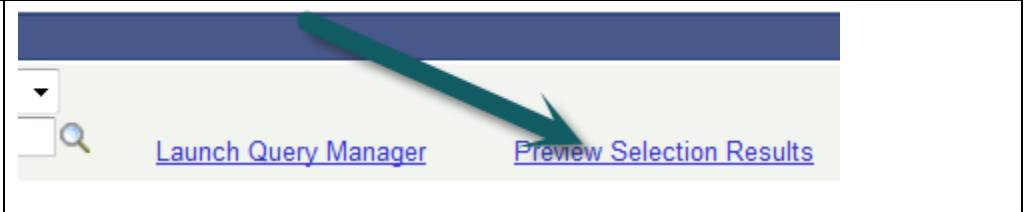
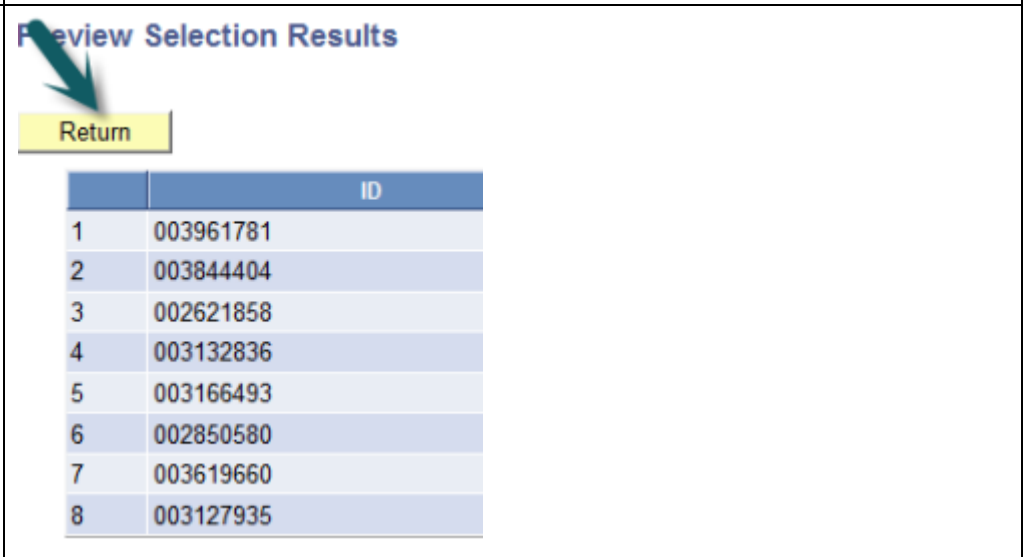



| | | |
|----|--|--|
| 6 | Click SAVE |  |
| 7 | Click RUN at the top of the page |  |
| 8 | <p>Server Name should be set to PSUNX</p> <p>Click OK</p> |  <p>The dialog box shows 'Process Scheduler Request' with fields for User ID (BECKWITA), Run Control ID (AMANDA), Server Name (PSUNX), Run Date (06/05/2013), Recurrence, Run Time (9:21:59AM), and Time Zone (PST). A table below lists the process: SON Student Advisor Update (SON_ADVR_UPD) with type Application Engine, format PDF, and distribution Web. Buttons for OK and Cancel are at the bottom.</p> |
| 9 | Click on Process Monitor |   |
| 10 | <p>Check Run Status. Depending on how large your file, you will see processing for a bit. Hit Refresh to update status</p> |  <p>The screenshot shows a 'Refresh' button and a table with columns: User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row: BECKWITA, 06/05/2013 9:21:59AM PDT, Processing, N/A, and a Details link.</p> |
| 11 | <p>Once your Run Status says "Success" click on the blue Details link</p> |  <p>The screenshot shows the table with the status 'Success' and the 'Details' link highlighted in blue. Red arrows point to the 'Success' text and the 'Details' link.</p> |

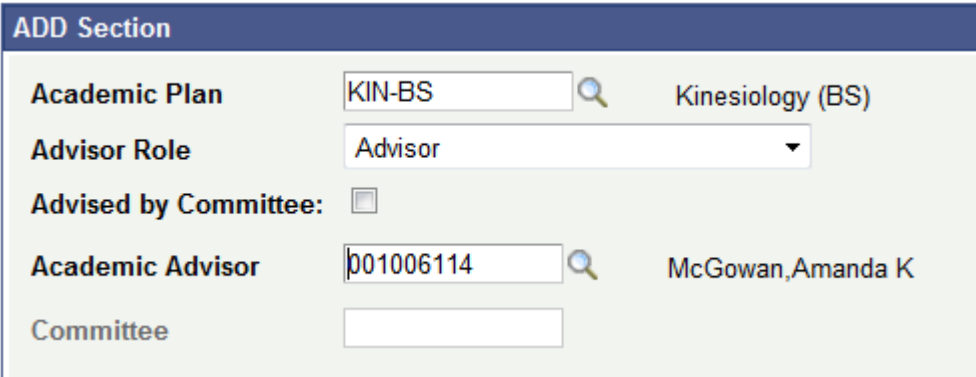
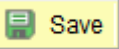
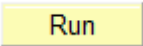
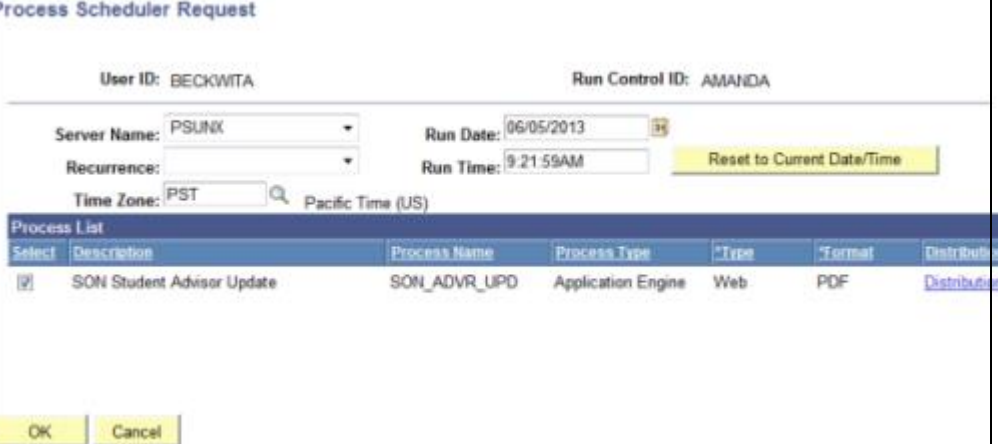

| | | |
|----|---|---|
| 12 | Click on View Log/Trace |  |
| 13 | Click on the blue AE_SON_ADVR_UPD link |  |
| 14 | You can read this report to find out which students were processed and which students were skipped, (if any) and why they were not processed. | <pre> Program SON_ADVR_UPD Started 24-05-2013 09:24:08A (143 Process Instance: 966345 / %3 (14335,11) Parms: BECKWITA / AMANDA / no_longer_kinesiology.txt / 002621858 - Not Active in Plan KIN-BS (14335,11) 002850580 - Not Active in Plan KIN-BS (14335,11) 003127935 - Not Active in Plan KIN-BS (14335,11) 003132836 - Not Active in Plan KIN-BS (14335,11) </pre> |
| 15 | Return to step 2 to process a different batch of students! | |

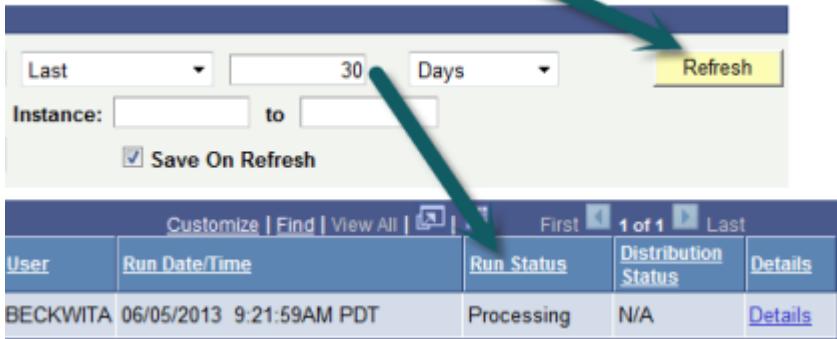
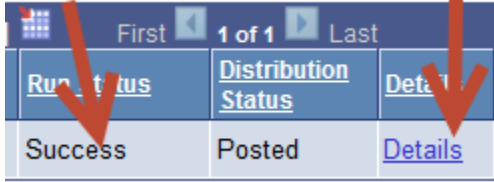
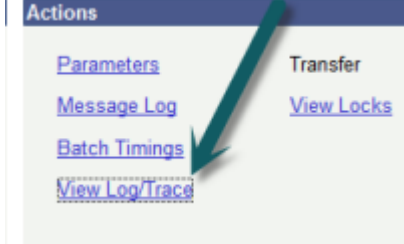
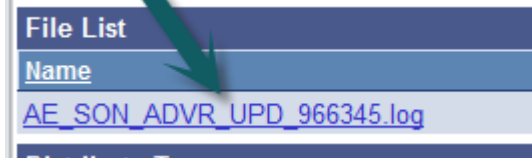
Lesson 2: Add an Advisor to a batch of students- using a QUERY

Navigation: SON Customizations > SON Campus Solutions > Advising > Process > Student Advisor Update

| | Action | Screenshot |
|----|---|--|
| 1 | Navigate to the Student Advisor Update (see above navigation) | Note: If you have not yet created a run control for this process, add a new value called Student Advisor Update before you proceed to step 2. |
| 2 | Selection Tool: PS Query |  |
| 3a | Use the magnifying glass to search for the query. (Your query should already have been set up) | Note: The query must have the appropriate BND record in it, or this will not work. You can't use just any query you've already written. Contact the CMS Advising lead if you need help with the query. (SON_ADV_UPD_BND)  |

| <p>3b</p> | <p>Only the list of eligible queries will display in the search results.</p> <p>Click on your query.</p> |  | | | | | | | | | | | | | | | | | | | |
|-----------|--|--|--|--|----|---|-----------|---|-----------|---|-----------|---|-----------|---|-----------|---|-----------|---|-----------|---|-----------|
| <p>3c</p> | <p>Click on Preview Selection Results to see the list of students that will be updated</p> |  | | | | | | | | | | | | | | | | | | | |
| <p>3d</p> | <p>If the results look correct, click Return</p> |  <table border="1" data-bbox="592 1176 1006 1543"> <thead> <tr> <th></th> <th>ID</th> </tr> </thead> <tbody> <tr><td>1</td><td>003961781</td></tr> <tr><td>2</td><td>003844404</td></tr> <tr><td>3</td><td>002621858</td></tr> <tr><td>4</td><td>003132836</td></tr> <tr><td>5</td><td>003166493</td></tr> <tr><td>6</td><td>002850580</td></tr> <tr><td>7</td><td>003619660</td></tr> <tr><td>8</td><td>003127935</td></tr> </tbody> </table> | | | ID | 1 | 003961781 | 2 | 003844404 | 3 | 002621858 | 4 | 003132836 | 5 | 003166493 | 6 | 002850580 | 7 | 003619660 | 8 | 003127935 |
| | ID | | | | | | | | | | | | | | | | | | | | |
| 1 | 003961781 | | | | | | | | | | | | | | | | | | | | |
| 2 | 003844404 | | | | | | | | | | | | | | | | | | | | |
| 3 | 002621858 | | | | | | | | | | | | | | | | | | | | |
| 4 | 003132836 | | | | | | | | | | | | | | | | | | | | |
| 5 | 003166493 | | | | | | | | | | | | | | | | | | | | |
| 6 | 002850580 | | | | | | | | | | | | | | | | | | | | |
| 7 | 003619660 | | | | | | | | | | | | | | | | | | | | |
| 8 | 003127935 | | | | | | | | | | | | | | | | | | | | |
| <p>4</p> | <p>Enter Academic Career</p> <p>Enter Academic Program</p> | <p>*Academic Institution</p> <p>Effective Date</p> <p>*Academic Career:</p> <p>*Academic Program</p> | <p>SOCMP  Sonoma State University</p> <p>06/05/2013</p> <p>UGRD  Undergraduate</p> <p>UGRD  Undergraduate</p> | | | | | | | | | | | | | | | | | | |

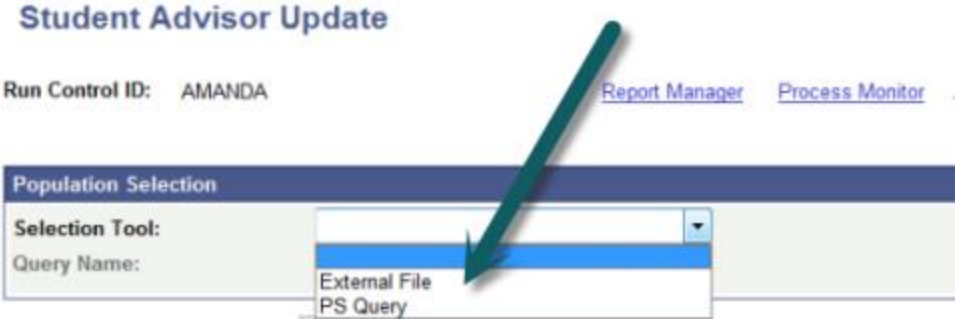

| | | |
|---|---|---|
| | | Note: You will need to process UGRD and PBAC separately if you are working with a mix of different Career/program students. |
| 5 | <p>ADD Section: <i>Fill out the following</i> Academic Plan: Advisor Role: Academic Advisor (use magnifying glass) OR Committee (if advised by committee, check the box before selecting your committee)</p> |  |
| 6 | Click SAVE |  |
| 7 | Click RUN at the top of the page |  |
| 8 | <p>Server Name should be set to PSUNX</p> <p>Click OK</p> |  |
| 9 | Click on Process Monitor |  |

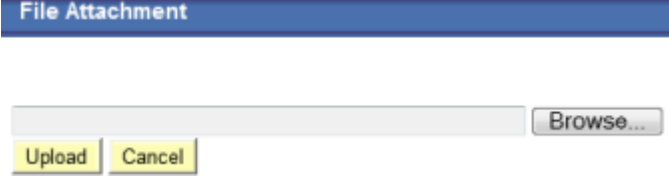
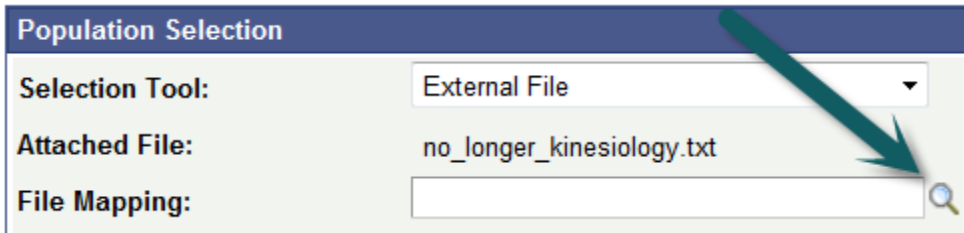




| | | |
|-----------|--|--|
| <p>10</p> | <p>Check Run Status. Depending on how large your file, you will see processing for a bit. Hit Refresh to update status</p> |  |
| <p>11</p> | <p>Once your Run Status says "Success" click on the blue Details link</p> |  |
| <p>12</p> | <p>Click on View Log/Trace</p> |  |
| <p>13</p> | <p>Click on the blue AE_SON_ADVR_UPD link</p> |  |

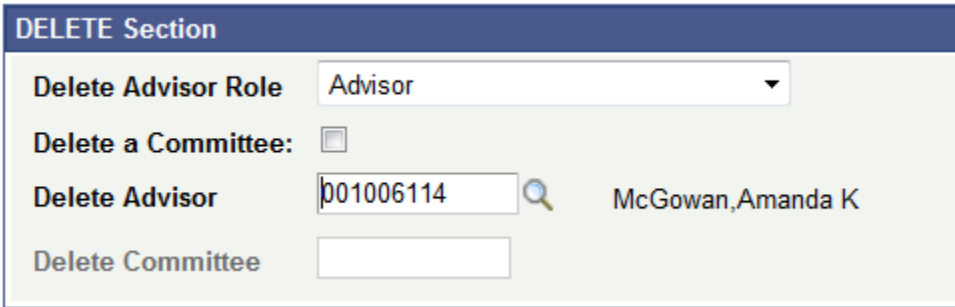
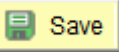
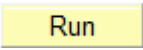
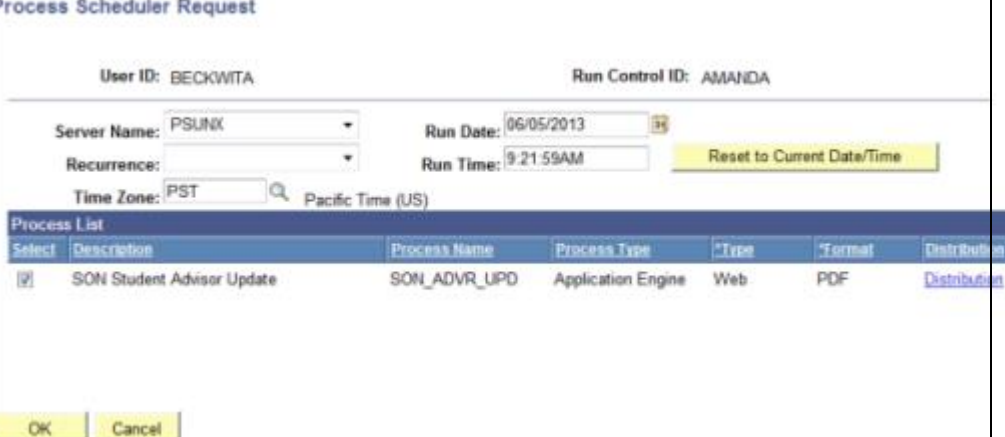

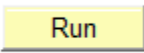
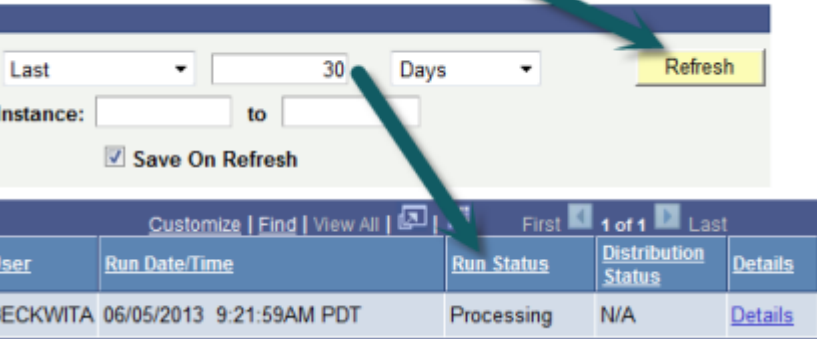
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| 14 | You can read this report to find out which students were processed and which students were skipped, (if any) and why they were not processed. | <pre> Program SON_ADVR_UPD Started 24-05-2013 09:24:08A (143 Process Instance: 966345 / %3 (14335,11) Parms: BECKWITA / AMANDA / no_longer_kinesiology.txt / 002621858 - Not Active in Plan KIN-BS (14335,11) 002850580 - Not Active in Plan KIN-BS (14335,11) 003127935 - Not Active in Plan KIN-BS (14335,11) 003132836 - Not Active in Plan KIN-BS (14335,11) </pre> |
| 15 | Repeat to add students to a different advisor within your majors/minors. | |

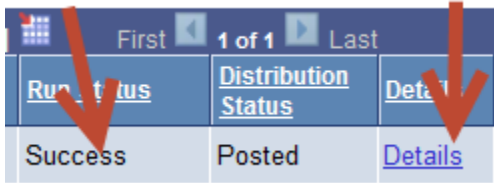
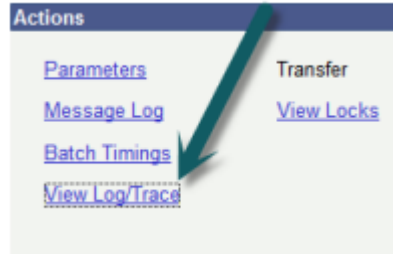
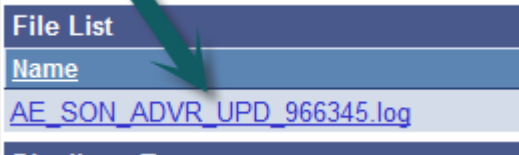
Lesson 3: Delete an Advisor from a batch of students – using a FILE

Navigation: SON Customizations > SON Campus Solutions > Advising > Process > Student Advisor Update

| | Action | Screenshot |
|----|--|---|
| 1 | Navigate to the Student Advisor Update in MySSU (see above navigation) | Note: If you have not yet created a run control for this process, add a new value called Student Advisor Update before you proceed to step 2. |
| 2 | Selection Tool: External File |  |
| 3a | Get your file ready | If you have your list of student ID's, save them into a .txt file with no other information saved into the file (any other information like headers should be deleted from the excel file so only emplid (student ID) gets saved into the .txt file) –THIS IS REALLY IMPORTANT. THE PROCESS WILL NOT WORK IF YOU DO NOT DO A “SAVE AS” TO CONVERT YOUR EXCEL FILE TO A .TXT |
| 3b | Click on Upload File |  |

| | | |
|----|---|--|
| 3c | Click on Browse to find the .txt file you've created with the list of emplids, and select your file |  |
| 3d | Click on the magnifying glass to the right of the file mapping box |  |
| 3e | On the 'Look up File Mapping' page, click on 'SON STUDENT ADVISOR UPDATE' |  |
| 4 | <p>Enter Academic Career</p> <p>Enter Academic Program</p> | <p>*Academic Institution SOCMP  Sonoma State University</p> <p>Effective Date 06/05/2013</p> <p>*Academic Career: UGRD  Undergraduate</p> <p>*Academic Program UGRD  Undergraduate</p> <p>Note: You will need to process UGRD and PBAC separately if you are working with a mix of different Career/program students.</p> |
| 5 | <p>DELETE Section: You can run this process to delete an Advisor OR a delete a Committee</p> | <p>(Leave the ADD Section blank)</p> |

| | <p>Select: Delete Advisor Role And Delete Advisor</p> |  <p>DELETE Section</p> <p>Delete Advisor Role: <input type="text" value="Advisor"/></p> <p>Delete a Committee: <input type="checkbox"/></p> <p>Delete Advisor: <input type="text" value="001006114"/> <input type="button" value="Search"/> McGowan, Amanda K</p> <p>Delete Committee: <input type="text"/></p> | | | | | | | | | | | | | | |
|-------------------------------------|--|--|---------------------|-------------------------|--------------|------------------------------|---------|----------|--------------------------|-------------------------------------|----------------------------|-------------------------|--------------------|-----|-----|------------------------------|
| 6 | Click SAVE |  | | | | | | | | | | | | | | |
| 7 | Click RUN at the top of the page |  | | | | | | | | | | | | | | |
| 8 | <p>Server Name should be set to PSUNX</p> <p>Click OK</p> |  <p>Process Scheduler Request</p> <p>User ID: BECKWITA Run Control ID: AMANDA</p> <p>Server Name: <input type="text" value="PSUNX"/> Run Date: <input type="text" value="06/05/2013"/> <input type="button" value="BX"/></p> <p>Recurrence: <input type="text"/> Run Time: <input type="text" value="9:21:59AM"/> <input type="button" value="Reset to Current Date/Time"/></p> <p>Time Zone: <input type="text" value="PST"/> <input type="button" value="Search"/> Pacific Time (US)</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Description</th> <th>Process Name</th> <th>Process Type</th> <th>Type</th> <th>Format</th> <th>Distribution</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>SON Student Advisor Update</td> <td>SON_AOVR_UPD</td> <td>Application Engine</td> <td>Web</td> <td>PDF</td> <td>Distribution</td> </tr> </tbody> </table> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> | Select | Description | Process Name | Process Type | Type | Format | Distribution | <input checked="" type="checkbox"/> | SON Student Advisor Update | SON_AOVR_UPD | Application Engine | Web | PDF | Distribution |
| Select | Description | Process Name | Process Type | Type | Format | Distribution | | | | | | | | | | |
| <input checked="" type="checkbox"/> | SON Student Advisor Update | SON_AOVR_UPD | Application Engine | Web | PDF | Distribution | | | | | | | | | | |
| 9 | Click on Process Monitor |   | | | | | | | | | | | | | | |
| 10 | <p>Check Run Status. Depending on how large your file, you will see processing for a bit. Hit Refresh to update status</p> |  <p>Last <input type="text" value="30"/> Days <input type="button" value="Refresh"/></p> <p>Instance: <input type="text"/> to <input type="text"/></p> <p><input checked="" type="checkbox"/> Save On Refresh</p> <table border="1"> <thead> <tr> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>BECKWITA</td> <td>06/05/2013 9:21:59AM PDT</td> <td>Processing</td> <td>N/A</td> <td>Details</td> </tr> </tbody> </table> | User | Run Date/Time | Run Status | Distribution Status | Details | BECKWITA | 06/05/2013 9:21:59AM PDT | Processing | N/A | Details | | | | |
| User | Run Date/Time | Run Status | Distribution Status | Details | | | | | | | | | | | | |
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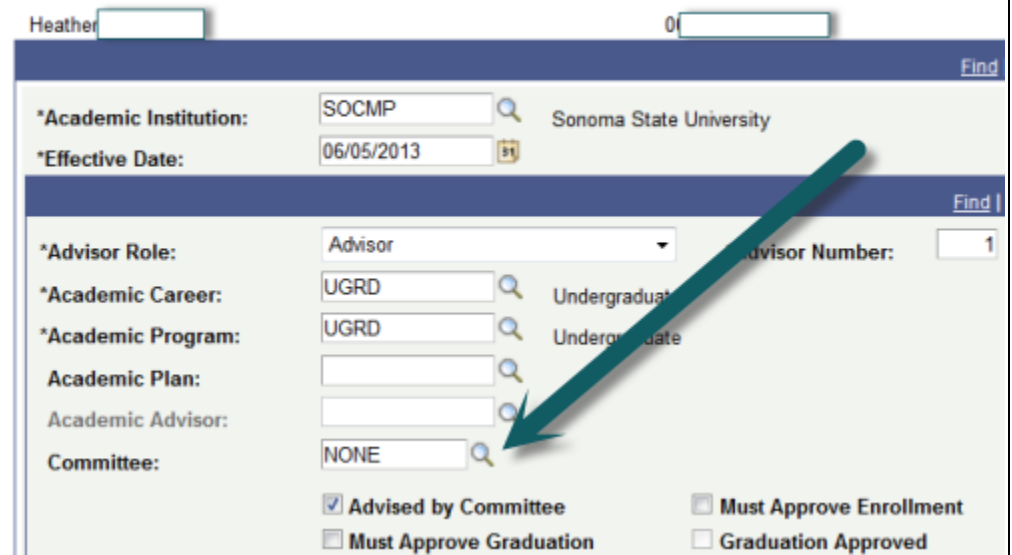
| | | |
|----|---|---|
| 11 | Once your Run Status says "Success" click on the blue Details link |  |
| 12 | Click on View Log/Trace |  |
| 13 | Click on the blue AE_SON_ADVR_UPD link |  |
| 14 | You can read this report to find out which students were processed and which students were skipped, (if any) and why they were not processed. | <pre> Program SON_ADVR_UPD Started 24-05-2013 09:24:08A (143 Process Instance: 966345 / %3 (14335,11) Parms: BECKWITA / AMANDA / no_longer_kinesiology.txt / 002621858 - Not Active in Plan KIN-BS (14335,11) 002850580 - Not Active in Plan KIN-BS (14335,11) 003127935 - Not Active in Plan KIN-BS (14335,11) 003132836 - Not Active in Plan KIN-BS (14335,11) </pre> |

15 Note that if running this process deleted an advisor for a student, and the student only had one advisor, they will now have a NONE row inserted on the Student Advisor page.

This allows us to retain the historical data of the advisor, something that we can't retain if you do a delete from the regular page.

Navigate to: Records and Enrollment > Student Background Information > Student Advisor

Student Advisor



Heather [] 0 [] Find

*Academic Institution: SOCMP Sonoma State University

*Effective Date: 06/05/2013 31

*Advisor Role: Advisor Advisor Number: 1

*Academic Career: UGRD Undergraduate

*Academic Program: UGRD Undergraduate

Academic Plan: []

Academic Advisor: []

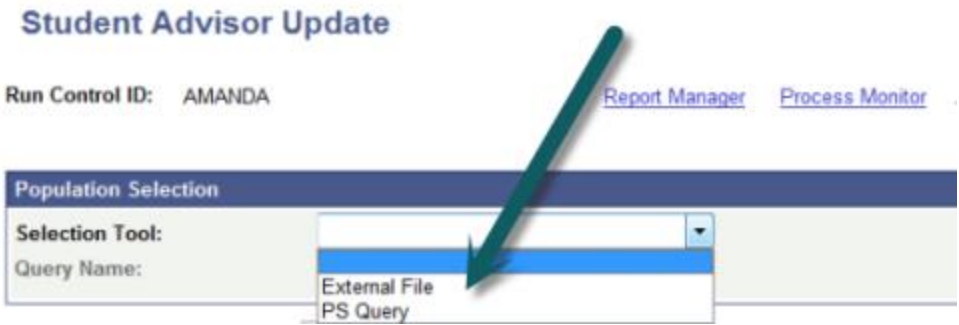
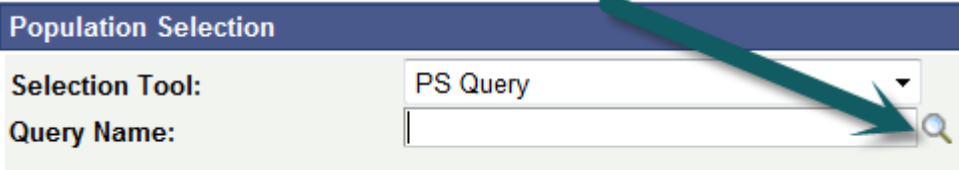
Committee: NONE

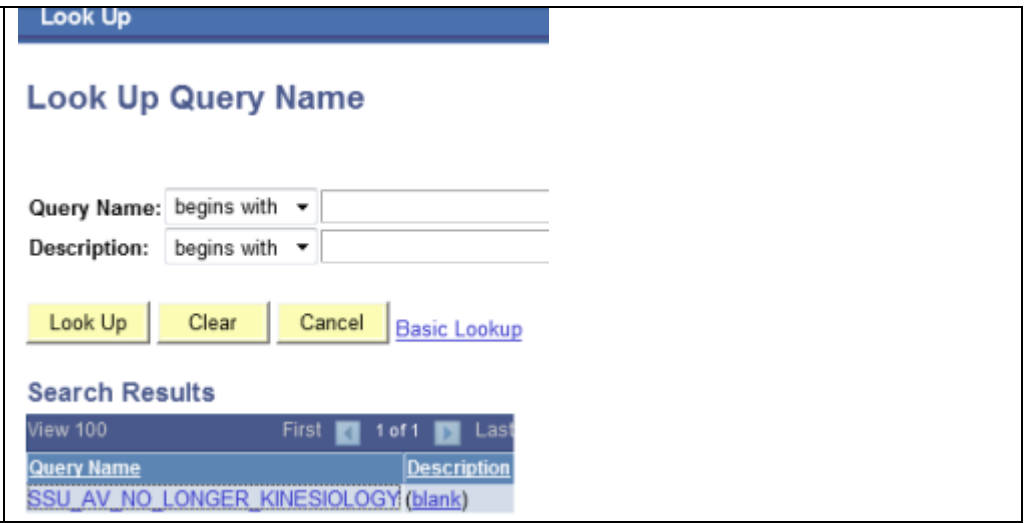
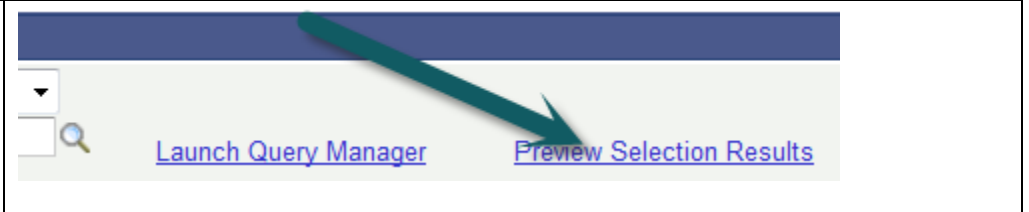
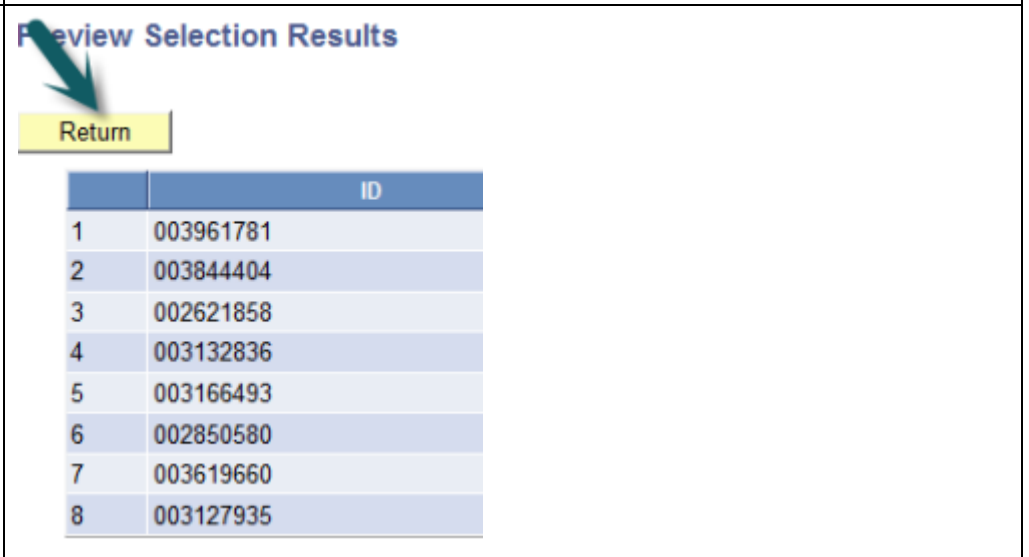



Advised by Committee Must Approve Enrollment

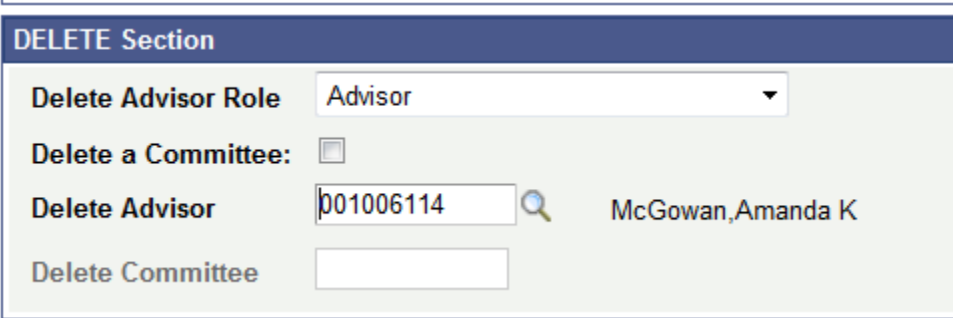
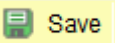
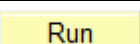
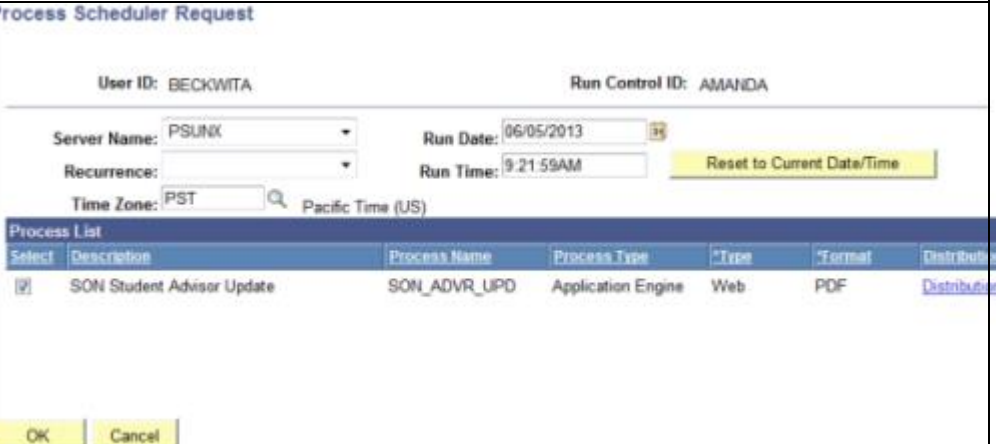


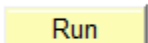
Must Approve Graduation Graduation Approved

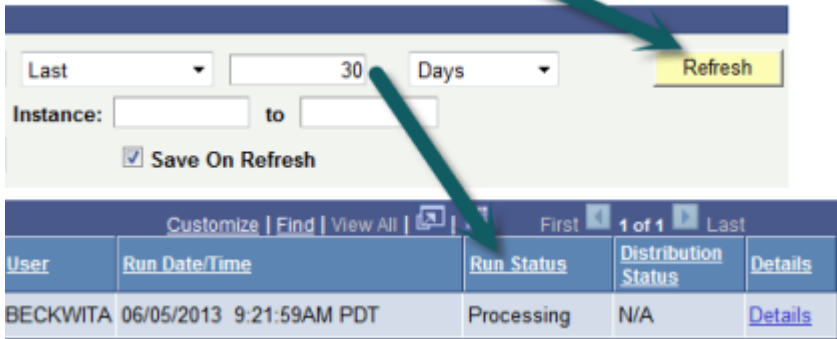
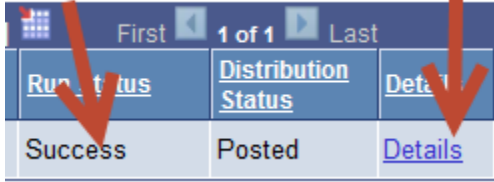
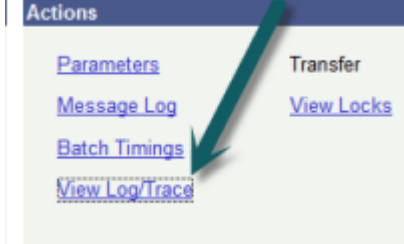
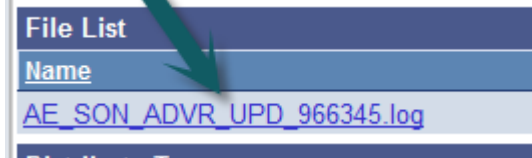
Lesson 4: Delete an Advisor from a batch of students- using a QUERY

Navigation: SON Customizations > SON Campus Solutions > Advising > Process > Student Advisor Update

| | Action | Screenshot |
|----|---|--|
| 1 | Navigate to the Student Advisor Update (see above navigation) | Note: If you have not yet created a run control for this process, add a new value called Student Advisor Update before you proceed to step 2. |
| 2 | Selection Tool: PS Query |  |
| 3a | Use the magnifying glass to search for the query. (Your query should already have been set up) | Note: The query must have the appropriate BND record in it, or this will not work. You can't use just any query you've already written. Contact the CMS Advising lead if you need help with the query. (SON_ADV_UPD_BND)  |

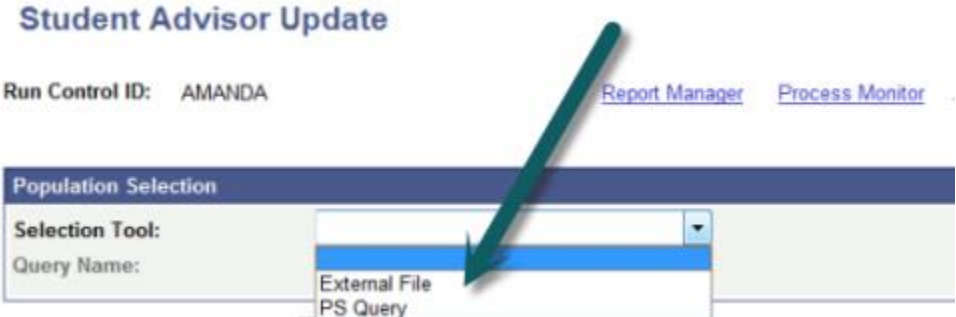
| <p>3b</p> | <p>Only the list of eligible queries will display in the search results.</p> <p>Click on your query.</p> |  | | | | | | | | | | | | | | | | | | | |
|-----------|--|--|--|--|----|---|-----------|---|-----------|---|-----------|---|-----------|---|-----------|---|-----------|---|-----------|---|-----------|
| <p>3c</p> | <p>Click on Preview Selection Results to see the list of students that will be updated</p> |  | | | | | | | | | | | | | | | | | | | |
| <p>3d</p> | <p>If the results look correct, click Return</p> |  <table border="1" data-bbox="592 1176 1003 1543"> <thead> <tr> <th></th> <th>ID</th> </tr> </thead> <tbody> <tr><td>1</td><td>003961781</td></tr> <tr><td>2</td><td>003844404</td></tr> <tr><td>3</td><td>002621858</td></tr> <tr><td>4</td><td>003132836</td></tr> <tr><td>5</td><td>003166493</td></tr> <tr><td>6</td><td>002850580</td></tr> <tr><td>7</td><td>003619660</td></tr> <tr><td>8</td><td>003127935</td></tr> </tbody> </table> | | | ID | 1 | 003961781 | 2 | 003844404 | 3 | 002621858 | 4 | 003132836 | 5 | 003166493 | 6 | 002850580 | 7 | 003619660 | 8 | 003127935 |
| | ID | | | | | | | | | | | | | | | | | | | | |
| 1 | 003961781 | | | | | | | | | | | | | | | | | | | | |
| 2 | 003844404 | | | | | | | | | | | | | | | | | | | | |
| 3 | 002621858 | | | | | | | | | | | | | | | | | | | | |
| 4 | 003132836 | | | | | | | | | | | | | | | | | | | | |
| 5 | 003166493 | | | | | | | | | | | | | | | | | | | | |
| 6 | 002850580 | | | | | | | | | | | | | | | | | | | | |
| 7 | 003619660 | | | | | | | | | | | | | | | | | | | | |
| 8 | 003127935 | | | | | | | | | | | | | | | | | | | | |
| <p>4</p> | <p>Enter Academic Career</p> <p>Enter Academic Program</p> | <p>*Academic Institution</p> <p>Effective Date</p> <p>*Academic Career:</p> <p>*Academic Program</p> | <p>SOCMP  Sonoma State University</p> <p>06/05/2013</p> <p>UGRD  Undergraduate</p> <p>UGRD  Undergraduate</p> | | | | | | | | | | | | | | | | | | |




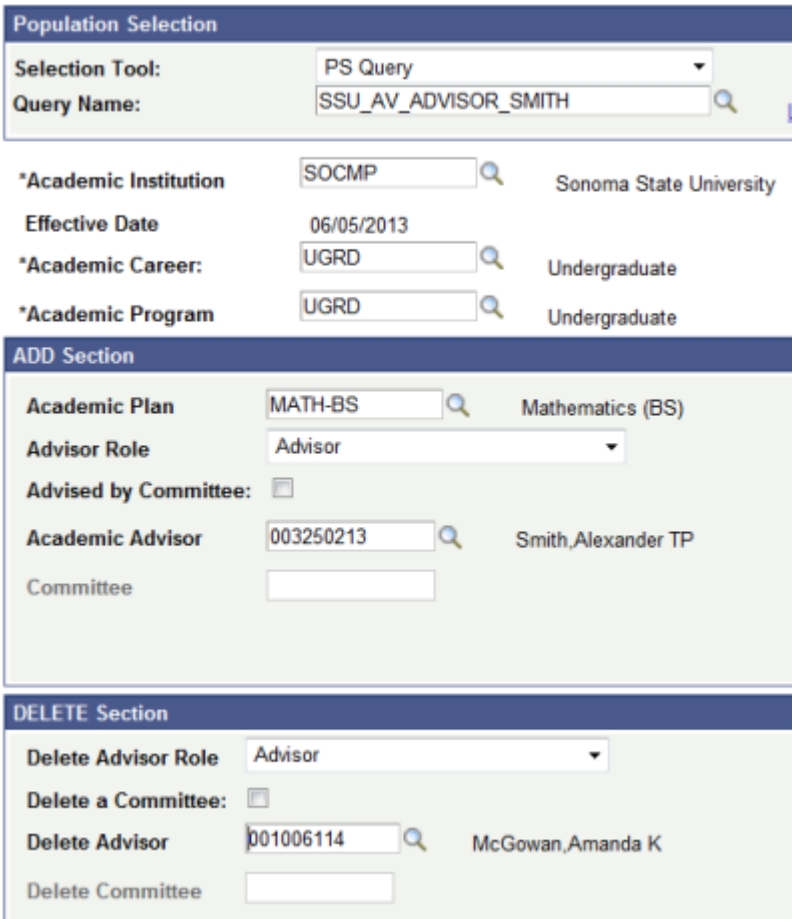







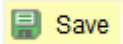
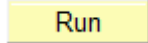
| | | |
|---|---|---|
| | | Note: You will need to process UGRD and PBAC separately if you are working with a mix of different Career/program students. |
| 5 | <p>DELETE Section: You can run this process to delete an Advisor OR a delete a Committee</p> <p>Select: Delete Advisor Role And Delete Advisor</p> | <p>(Leave the ADD Section blank)</p>  |
| 6 | Click SAVE |  |
| 7 | Click RUN at the top of the page |  |
| 8 | <p>Server Name should be set to PSUNX</p> <p>Click OK</p> |  |
| 9 | Click on Process Monitor |    |

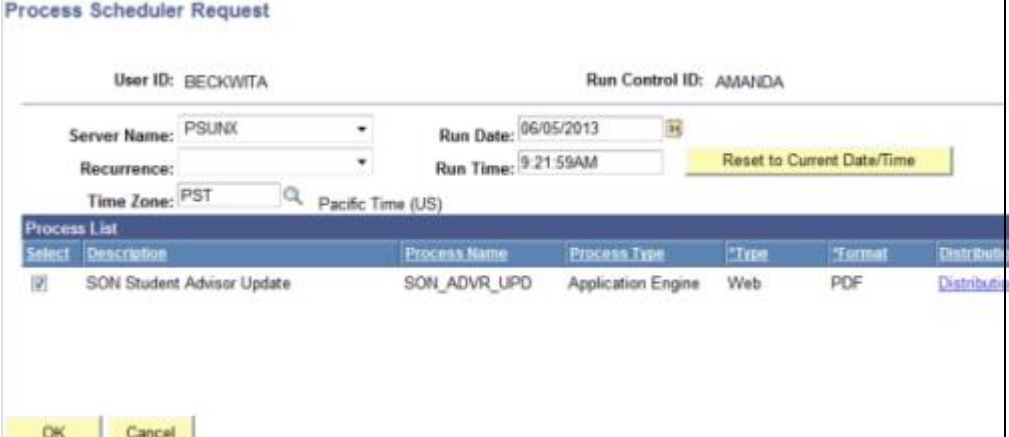

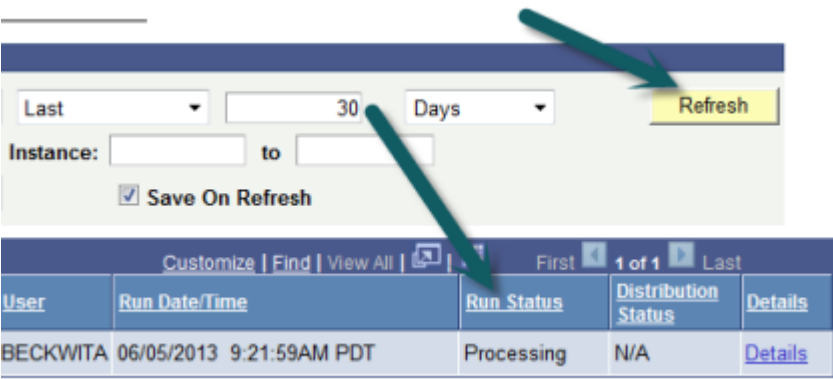
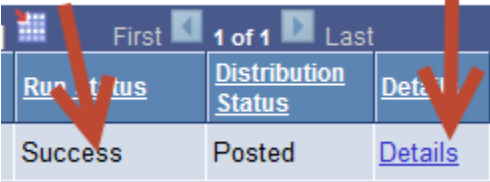
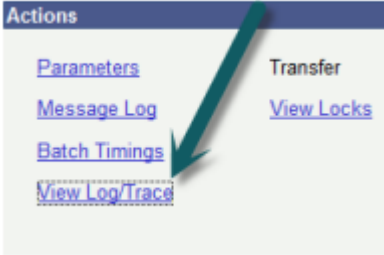
| | | |
|-----------|--|--|
| <p>10</p> | <p>Check Run Status. Depending on how large your file, you will see processing for a bit. Hit Refresh to update status</p> |  |
| <p>11</p> | <p>Once your Run Status says "Success" click on the blue Details link</p> |  |
| <p>12</p> | <p>Click on View Log/Trace</p> |  |
| <p>13</p> | <p>Click on the blue AE_SON_ADVR_UPD link</p> |  |

| | | |
|----|---|---|
| 14 | You can read this report to find out which students were processed and which students were skipped, (if any) and why they were not processed. | <pre> Program SON_ADVR_UPD Started 24-05-2013 09:24:08A (143 Process Instance: 966345 / %3 (14335,11) Parms: BECKWITA / AMANDA / no_longer_kinesiology.txt / 002621858 - Not Active in Plan KIN-BS (14335,11) 002850580 - Not Active in Plan KIN-BS (14335,11) 003127935 - Not Active in Plan KIN-BS (14335,11) 003132836 - Not Active in Plan KIN-BS (14335,11) </pre> |
| 15 | Return to step 2 to process a different batch of students! | |

Lesson 5: Swap a batch of students from one advisor to another

| Navigation: SON Customizations > SON Campus Solutions > Advising > Process > Student Advisor Update | | |
|---|---|---|
| | Action | Screenshot |
| 1 | Navigate to the Student Advisor Update (see above navigation) | Note: If you have not yet created a run control for this process, add a new value called Student Advisor Update before you proceed to step 2. |
| 2 | Selection Tool: External File Or Query (review previous lessons regarding selecting a query or external file and follow step 3 depending on which route you are taking) |  |
| 3 | Now that you've selected Query or File and it's been uploaded, continue | |

| | | |
|---|--|--|
| 4 | <p>Enter Academic Career</p> <p>Enter Academic Program</p> | <p>*Academic Institution <input type="text" value="SOCMP"/>  Sonoma State University</p> <p>Effective Date 06/05/2013</p> <p>*Academic Career: <input type="text" value="UGRD"/>  Undergraduate</p> <p>*Academic Program <input type="text" value="UGRD"/>  Undergraduate</p> <p>Note: You will need to process UGRD and PBAC separately if you are working with a mix of different Career/program students.</p> |
| 5 | <p><u>ADD Section:</u> Enter the Academic Plan and the Academic Advisor that you are switching this batch of students TO</p> <p><u>DELETE Section:</u> Enter the Advisor name that you are switching the students FROM (so the students will no longer have this advisor, they will have the advisor you have listed in the ADD section)</p> |  <p>Population Selection</p> <p>Selection Tool: <input type="text" value="PS Query"/></p> <p>Query Name: <input type="text" value="SSU_AV_ADVISOR_SMITH"/> </p> <p>*Academic Institution <input type="text" value="SOCMP"/>  Sonoma State University</p> <p>Effective Date 06/05/2013</p> <p>*Academic Career: <input type="text" value="UGRD"/>  Undergraduate</p> <p>*Academic Program <input type="text" value="UGRD"/>  Undergraduate</p> <p>ADD Section</p> <p>Academic Plan <input type="text" value="MATH-BS"/>  Mathematics (BS)</p> <p>Advisor Role <input type="text" value="Advisor"/></p> <p>Advised by Committee: <input type="checkbox"/></p> <p>Academic Advisor <input type="text" value="003250213"/>  Smith, Alexander TP</p> <p>Committee <input type="text"/></p> <p>DELETE Section</p> <p>Delete Advisor Role <input type="text" value="Advisor"/></p> <p>Delete a Committee: <input type="checkbox"/></p> <p>Delete Advisor <input type="text" value="001006114"/>  McGowan, Amanda K</p> <p>Delete Committee <input type="text"/></p> |
| 6 | Click SAVE |  |
| 7 | Click RUN at the top of the page |  |

| <p>8</p> | <p>Server Name should be set to PSUNX</p> <p>Click OK</p> |  | | | | | | | | | | |
|-----------|--|---|---------------------|-------------------------|------------|---------------------|---------|----------|--------------------------|------------|-----|-------------------------|
| <p>9</p> | <p>Click on Process Monitor</p> |  | | | | | | | | | | |
| <p>10</p> | <p>Check Run Status. Depending on how large your file, you will see processing for a bit. Hit Refresh to update status</p> |  <table border="1" data-bbox="544 1108 1372 1247"> <thead> <tr> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>BECKWITA</td> <td>06/05/2013 9:21:59AM PDT</td> <td>Processing</td> <td>N/A</td> <td>Details</td> </tr> </tbody> </table> | User | Run Date/Time | Run Status | Distribution Status | Details | BECKWITA | 06/05/2013 9:21:59AM PDT | Processing | N/A | Details |
| User | Run Date/Time | Run Status | Distribution Status | Details | | | | | | | | |
| BECKWITA | 06/05/2013 9:21:59AM PDT | Processing | N/A | Details | | | | | | | | |
| <p>11</p> | <p>Once your Run Status says "Success" click on the blue Details link</p> |  | | | | | | | | | | |
| <p>12</p> | <p>Click on View Log/Trace</p> |  | | | | | | | | | | |

| | | |
|----|--|---|
| 13 | You should see a list of students that have been moved from Amanda McGowan to Alexander Smith. | This would only be used to swap within your department, not across departments. |
|----|--|---|

Lesson 6: Queries you can use with this process

You can use any of the below queries within this process. Note that any existing queries you might have will not work unless a specific table is attached to the query. Contact the CMS Advising lead if these queries do not meet your needs.

| | | |
|---|--|--|
| 1 | <p>SSU_AV_ADVR_NO_ADVSR_BY_PLAN</p> <p>This query will find all active students in a specific Major or Minor that do not have an advisor tied to that Major or Minor (they might have advisors in other Majors or Minors).</p> | <p>If you'd like to view the query results before you use this in the process, follow these steps:</p> <ol style="list-style-type: none"> 1) Navigate to Query Viewer 2) Copy and paste the query name and hit search 3) Click on the blue HTML link 4) Enter the Academic Plan (Major or Minor) |
| 2 | <p>SSU_AV_ADVR_ACTV_STDT_BY_ADVR</p> <p>This query will find all active students assigned to a specific advisor.</p> | <p>If you'd like to view the query results before you use this in the process, follow these steps:</p> <ol style="list-style-type: none"> 1) Navigate to Query Viewer 2) Copy and paste the query name and hit search 3) Click on the blue HTML link 4) Enter the current term in the TERM box 5) Enter the Advisor ID, or use the magnifying glass to find the Advisor ID (if you need to search for the ID, it is easiest to change the "Search by" to "Last Name") 6) Click on View Results |
| 3 | <p>SSU_AV_ADVR_ACTV_STDT_BY_PLAN</p> <p>This query will find all students that have an advisor, based on ACAD PLAN (Major or Minor).</p> | <p>If you'd like to view the query results before you use this in the process, follow these steps:</p> <ol style="list-style-type: none"> 1) Enter the current Term 2) Enter SOCMP for Institution 3) Enter the ACAD PLAN (major or minor) or use the magnifying glass to search for the correct spelling 4) Click on View Results |

| | | |
|----------|---|--|
| <p>4</p> | <p>SSU_AV_ADVR_STDT_BY_P LN_SPL</p> <p>This query will find all students that have an advisor, based on ACAD PLAN (Major or Minor) & ACAD SUBPLAN (concentration, track, etc)</p> | <p>If you'd like to view the query results before you use this in the process, follow these steps:</p> <ol style="list-style-type: none"> 1) Enter the current Term 2) Enter SOCMP for Institution 3) Enter the ACAD PLAN (major or minor) or use the magnifying glass to search for the correct spelling 4) Enter the SUB PLAN (concentration, track, etc) or use the magnifying glass to search for the correct spelling 5) Click on View Results |
|----------|---|--|