

Student Advisor Pages

The Student Advisor application element of Banner Student Advising Student Profile can be used by advisors and faculty members who are advisors to view important information about their advisees. It contains the following pages:

- Advisee Search page with Getting Started tab
- Advisee Listing page with Getting Started tab
- Student Card

Functionality from Banner Faculty and Advisor Self-Service 8.x pages has been incorporated into Banner Student Advising Student Profile 9.x. You can review existing 8.x Self-Service pages and compare that data to the data presented in Advisor Self-Service. You may wish to disable some of the 8.x menu items.

Application access

When an advisor or student accesses the Advising Student Profile module, the path followed to navigate to the application pages differs.

Advisor access path

An advisor can log in and use the `StudentAdvisorSSB` URL or can select the Advising Student Profile menu link in Banner Faculty and Advisor Self-Service.

In either case, the advisor is taken to the Advisee Search page. After searching for an individual student on the Advisee Search page or selecting a record from the Advisee Listing page, an advisor can continue to the Student Profile page.



Note: For an advisor, the Advising Student Profile menu link is available on the Banner Faculty and Advisor Self-Service Main Menu (`bmenu.P_FacMainMnu`). The menu item is delivered as seed data and can be modified in Banner Web Tailor. For more information, see the *Banner Web Tailor User Guide*.

Advisee Search page

The Advisee Search page is used by an advisor to select a term for which the advisor would like to search for a specific advisee to view their student profile information or view a list of all of their advisees. The Getting Started tab is displayed on this page. Confidential notations are displayed for students as applicable.



Note: When a student is deceased and the user searches on that student by ID, name, or email address, a message is displayed that information is not available and to contact the student records office.

Search for an advisee by student ID

To search for an advisee by ID, perform the following steps:

1. Select the term for which you would like to search for an advisee.
2. Select the **Student ID** radio button.
3. Enter the student's ID.

You must enter the complete ID.

4. When a match is found, click **View Profile**.

When no match is found, a message is displayed in the Notification Center.

Search for an advisee by email address

To search for an advisee by email address, perform the following steps:

1. Select the term for which you would like to search for an advisee.
2. Select the **Student Email** radio button.
3. Enter the student's email address.

You must enter the complete email address for the search, up to 128 characters. The email address can also be pasted into the field.

You can drag and expand the field to view long character strings.

4. When a match is found, click **View Profile**.

When no match is found, a message is displayed in the Notification Center.

Search for an advisee by name

To search for an advisee by name, perform the following steps:

1. Select the term for which you would like to search for an advisee.
2. Select the **Student Name** radio button.
3. Enter the student's name, using Last Name, First Name Middle Name format, and then select the individual advisee that you would like to view.

When using this format, at least the first three characters of the name must be entered before a name search will take place.

When searching by name, if the student you need is not returned in the list for the term, scroll down to the **My Student is not listed** option at the bottom of the list.

Click **My Student is not listed** to perform a search for a student across all terms. If your search returns a valid result, after selecting the student, the most recent effective term record for that student will be displayed. This allows you to easily find the student by selecting his/her effective term.

4. Click **View Profile** to access the Student Profile page.

View all advisees assigned to an advisor

To view all advisees assigned to an advisor, perform the following steps:

1. Select the term for which you would like to view all assigned advisees.
2. Click **View My Advisee Listing**.

Fields

The following fields are on this page.

Fields	Descriptions
Term	Term code and description of the term for which you would like to search for an advisee or view your advisee list.

Fields	Descriptions
View advisee listing or search by	<p>Radio group used to select search parameters.</p> <p><code>Student ID</code> - Radio button used to search for the student ID of the advisee.</p> <p><code>Student Email</code> - Radio button used to search for the email address of the advisee.</p> <p><code>Student Name</code> - Radio button used to search for the name of the advisee.</p> <p>Tool tips for these search by options are delivered and can be configured on GURINFO.</p>
View Profile	Button used to access the student profile of the selected advisee.
View My Advisee Listing	Link used to view all advisees that are assigned to an advisor in the selected term.

Getting Started tab

The Getting Started tab is displayed at the right side of the Advisee Search page and the Advisee Listing page. The Getting Started data is delivered as Info Text that is configurable by your institution. Sample data could be *Use the Advisee Search page to select the term for which you would like to search for a specific advisee to view their student profile information. You may also click View My Advisee Listing to see all advisees assigned to you in the selected term.*

You can also provide reminders and messages, such as *REMINDER: all students must be registered for Fall 2016 by 9-Sep-2015.*

Advisee Listing page

The Advisee Listing page contains overview information about all advisees that are assigned to you in the selected term. The advisee data on this page may be sorted to allow you to locate a specific advisee or group of advisees. The Getting Started tab is displayed on this page.

View contact information for an advisee

To view contact information for an advisee, perform the following steps:

1. Select the term for which you would like to view all assigned advisees.
2. Click **View My Advisee Listing**.
3. Click on the photo of an advisee to view contact information for that individual.

View student profile information for an advisee

To view student profile information for an advisee, perform the following steps:

1. Select the term for which you would like to view all assigned advisees.
2. Click **View My Advisee Listing**.
3. Click **View Profile** under the **Name and ID** field to access the Student Profile Page for a specific advisee.

Filter the advisee list

This page uses advanced filtering for queries for advisee listings. You can filter data on the advisee listing columns. Each column has a list of defined operators displayed in the **Operator** field. Use the **Delete** (-) button or the **Clear All** button to remove added columns from the filter and the **Go** button to view the results of the filter.

The filter results displays the number of records found and the columns used in the filter. A **Column Name X** button is displayed for each field included in the filter. You can remove each column, one at a time, and the filtered results are revised for the remaining filters. Use the **Remove Filter** button to view the original unfiltered results. The filter drop down (triangle) icon is used to display your filter settings so you can review what you selected for your recent filter and modify your choices.

When a filter is in use, it remains active for the session until it is removed, the term is changed, or the user logs out. Any changes to column order and value sorting also remain in effect for the filter. If you go from the Filter Results to the Student Profile page and come back to the Advisee Listing page, the filter remains active.

Here is a list of operators that can be used with the fields in the filter. The list of operators that is available depends on the column added to the filter.

Operator	Action
Contains	Enter text
Equals	Enter text May be prompted for first three letters to receive a list of valid values May be prompted to select from a list of valid values
Not Equals	Enter text May be prompted for first three letters to receive a list of valid values May be prompted to select from a list of valid values
Starts With	Enter text
Exists	Checks the database, no text field used

Operator	Action
Does Not Exist	Checks the database, no text field used
Is true	Checks the database, no text field used
Is false	Checks the database, no text field used

To use an advanced filter on the advisee listing, perform the following steps:

1. Select the filter settings for the query.
 - 1.1. Select a column from the pulldown list or use the default column `Last Name`.
 - 1.2. Add columns to the query using the **Add Another Column** list.
 - 1.3. For each column, select an operator such as `Equals`, `Contains`, `Exists`, `Starts With`. The operator choices vary depending on the column selected.
 - 1.4. If applicable, enter text for the operator, or select a value from the valid list.
2. Click **Go**.
3. Review the results.
4. Click on the **X** buttons to remove unneeded filter components, or select the **Filter** button to edit or add additional filter columns.
5. Review the revised results.
6. Click **Remove Filter** to view the original unfiltered results.

Export the advisee list

To export the advisee list to a spreadsheet, perform the following steps.

1. Go to the Tools menu (**Gear** button) and select Export Advisee Listing.
2. In the Export Advisee Listing window, select an export option, such as `Excel spreadsheet (.xlsx)` or `Excel spreadsheet (.xls)`.
3. Click **Export**.
4. When prompted, open or save the Excel file to view the results.
5. If prompted, check the indicator to `Do this automatically for files like this from now on`. Your browser may not display this message.
6. Click **OK**.
7. View the spreadsheet.
8. The file is automatically named based on the term used for the advisee listing. Rename the file if you choose.
9. When multiple export spreadsheets are created, you can view the files in your Download list.



Note: When a filter is in use, only the filtered list is exported.

Email students

To email the students in the advisee list, perform the following steps.

1. Select the **Email All** button.
2. An Email All popup window is displayed with a message that the selection of advisees exceeds the number recipients allowed per email message.

Links are displayed for each group of recipients, such as **Email Message 1**, **Email Message 2**, and so on.

3. Click on **Email Message 1**.
 - 3.1. Review the students included in the populated email "to" list.

The to list is populated in the blind copy field so students do not see the other email recipients.

- 3.2. Enter the email subject and body text and click **Send**.
4. When multiple emails are needed based on the batch size allowed, click on **Email Message 2** and so on, copy and paste the email text into additional emails and send.
5. Click **Finished**.



Note: When a filter is in use, only the students on the filtered list are emailed.

Emails are sent in groups based on the batch size that is defined. For example, if the batch size is set to 100 recipients, and 300 students need to be contacted, multiple email message windows are created, and the user must select each **Email Message** link to enter or paste the email content and send the message. When the **Email Message** link is selected, it is flagged with a check mark. The **Finished** button is enabled when the links are checked. Use the **Cancel** button to close the Email All window and not send any remaining messages.

Email not found

When an email address is not found for a student, a message is displayed that you may want to filter the advisee list to identify the students without email addresses. You can click **Continue** to go ahead and email all of the other students.

Email application comma separators

Set your email application to use commas as separators between email addresses for multiple email message recipients.

Fields

The following fields are on this page.

Fields	Descriptions
Term	Defaulted term code and description of the term selected on the Advisee Search page.
Email All	Button used to send email to the students in the list.
<i>These fields are used for the advanced query.</i>	
Filter	Button used to display the fields used for the filter.
Remove Filter	Button used to remove the current filter and return to the original list.
Column	Name of column on which the query is performed. The <code>Last Name</code> column is the default.
Operator	Displays a list of operators for each field in the filter.
Value	Value to be entered or selected for the query.
Add Another Column	Displays a list of columns that can be added to the filter.
Cancel	Button used to close the filter display without executing the query.
Clear All	Button used to remove added fields. The filter criteria can then be re-entered.
Go	Button used to view the filter results.
<i>These are the fields in the Advisee Listing.</i>	
Advisee Photo	Displays a photo of the advisee, if available. If no photo is available, a placeholder is displayed. Click on the photo to view the student's contact card.
Name and ID	Student's name, last name first, and ID number. Click on the View Profile link to access the Student Profile page. Confidential indicator (lock) is displayed when the student's information is set as confidential on the General Person Page (SPAPERS).
Program	Program of the curriculum for the selected term.
Primary Major	Highest priority major associated with the primary learner curriculum for the selected term.
Academic Standing	Academic standing is the standing as of the most recent term that is less than or equal to the selected term.
Student Status	Student status recorded in the general student record.

Fields	Descriptions
Student Type	Student type in effect for the term selected.
Advisor Holds	Check mark is used to indicate whether an advisor hold can be released for the advisee.
Primary Advisor	Check mark is used to indicate whether you are the student's primary advisor.
Advisor Type	Advisor type assigned to the advisor for the student.
Campus	Campus associated with the primary learner curriculum for the selected term.
Study Level	Student level associated with the primary learner curriculum for the selected term.
Admit Type	Admission type by which the student was admitted to the primary learner curriculum for the selected term.
Admit Term	Term in which the student was admitted to the primary learner curriculum.
Catalog Term	Catalog term assigned to the student for the primary learner curriculum for the selected term.
Minor	Minor associated with the current active primary learner curriculum for the selected term.
Concentration	Highest priority concentration attached to the primary major for the primary learner curriculum for the selected term.
College	College associated with the primary learner curriculum for the selected term.

Getting Started tab

The Getting Started tab is displayed at the right side of the page. The Getting Started data is delivered as Info Text that is configurable by your institution. Sample data could be *The Advisee Listing page contains overview information about all advisees that are assigned to you in the selected term.*