

Quick Steps to Adding an Advisor/s :

Complete detailed documentation for the use of student Advisor component is located in the Student Data Update Manual.

<http://training.asr.umn.edu/records/manuals.html>



Important Note about Effective Date:








When possible the first day of the term is used as the Effective Date when assigning or changing advisor data. However, if you use a date in the middle of the term, the advisor will still be effective for that term. This works opposite to Program/Plan, where an Effective Date MUST be on or before the first day of the term.

Records and Enrollment > Student Background Information > Student Advisor

The **Student Advisor** page is used to attach specific Advisors or Advisory Committees to students. Each student may have multiple advisors, and each may be specific to an Academic Institution and Effective Date.



Student Advisor

Tom Peterson 2114840  


*Academic Institution: <input type="text" value="UMNTC"/> Univ of Minnesota, Twin Cities 		Find View All	First	1 of 2	Last
*Effective Date: <input type="text" value="01/15/2000"/> 					
*Advisor Role: <input type="text" value="Advisor"/> 		*Advisor Number: <input type="text" value="2"/>		Find View All	
*Academic Career: <input type="text" value="UGRD"/> 	Undergraduate				
*Academic Program: <input type="text" value="07UGR"/> 	Institute of Technology				
Academic Plan: <input type="text" value="016827007"/> 	Chemistry B S Chem				
Academic Advisor: <input type="text" value="2200256"/> 	Jones, John				
Committee: <input type="text"/>					
<input type="checkbox"/> Advised by Committee	<input type="checkbox"/> Must Approve Enrollment				
<input type="checkbox"/> Must Approve Graduation	<input type="checkbox"/> Graduation Approved				

Quick Steps - Adding an Advisor/s (where none exists):




Records and Enrollment > Student Background Information > Student Advisor


1. On the Search page, enter the ID for the student and click Search.
2. Enter the Academic Institution, if it does not automatically default.
3. Enter the Effective Date - if possible using the term start date.
4. Advisor role will default to Advisor. Change this value as needed.
5. Select active Academic Career from lookup search button.
6. Select active Academic Program (required) and Plan (not required).
7. Enter advisor ID. Or, if unknown, use  button to search for the Advisor's ID.
8. IF adding multiple advisors for the same Effective Date, insert rows by clicking the LOWER  and repeat steps 4 through 7 on the new blank line.
9. Save the page.

Student Advisor




Student Name _____ Student ID _____ 


Find | View All First 1 of 1 Last


'Academic Institution:  Univ of Minnesota, Twin Cities  


'Effective Date: 


Find First 1 of 1 Last

'Advisor Role:  'Advisor Number:  

'Academic Career: 

'Academic Program: 




Academic Plan: 




Academic Advisor: 

Committee:



Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved

 Save  Return to Search  Notify


 Update/Display  Include History  Correct History

Quick Steps - Adding an Advising Committee/s (no previous advisor or committee)




1. On the Search page, enter the ID for the student and click Search.
2. Enter the Academic Institution, if it does not automatically default.
3. Enter the Effective Date - if possible using the term start date.
4. Advisor role will default to Advisor. Change this value as needed.
5. Select active Academic Career from lookup search button.
6. Select active Academic Program (required) and Plan (not required).
7. Click on the Advised by Committee check box. This will grey out the Academic Advisor field and open the Committee field.
8. Enter the Committee or use the  button to search for committee (see note below regarding advising committee set up).
9. IF adding multiple committees for the same Effective Date, insert rows by clicking the LOWER  and repeat steps 4 through 7 on the new blank line.
10. Save the page.


Note: Advisor office information automatically defaults on the Student Advisor 2 page, based on the Committee selected on the Advisor 1 page. Please contact the Student Records Help Desk at 5-2803 or email srhelp@umn.edu for information regarding the set up and maintenance of advising committees.

Student Advisor




Student Name _____ Student ID _____ 


Find | View All First 1 of 1 Last


'Academic Institution:  Univ of Minnesota, Twin Cities  


'Effective Date: 

Find First 1 of 1 Last


'Advisor Role:  'Advisor Number:  

'Academic Career:  Undergraduate

'Academic Program:  Coll of Continuing Education




Academic Plan:  Non Degree




Academic Advisor:

Committee: 



Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved




 Save  Return to Search  Notify

 Update/Display  Include History  Correct History



Quick Steps – Changing Advisors


1. On the Search page, enter the ID for the student and click Search.
2. Click the UPPER  button to add a new row. All information will ‘roll’ forward. Note that the Effective Date is automatically today.
3. Enter the appropriate Effective Date - if possible, use the term start date.
4. Locate the advisor that is to be changed.
5. Enter Advisor ID. Or, if unknown, use  button to search for the Advisor’s ID.
6. Save the page.

Student Advisor

Student Name _____ Student ID _____   

Find | View All First 1 of 3 Last

'Academic Institution: Univ of Minnesota, Twin Cities  

'Effective Date: 


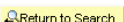

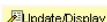
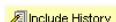
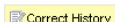
Find First 1-4 of 4 Last

'Advisor Role:	Advisor	'Advisor Number:	<input type="text" value="1"/>
'Academic Career:	UGRD Undergraduate		
'Academic Program:	17UGR College of Liberal Arts		
Academic Plan:	<input type="text" value="068820217"/>		
Academic Advisor:	<input type="text" value="1167281"/> Peterson, Kathleen F		
Committee:	<input type="text"/>		
	<input type="checkbox"/> Advised by Committee		<input type="checkbox"/> Must Approve Enrollment
	<input type="checkbox"/> Must Approve Graduation		<input type="checkbox"/> Graduation Approved





'Advisor Role:	Advisor	'Advisor Number:	<input type="text" value="4"/>
'Academic Career:	UGRD Undergraduate		
'Academic Program:	17UGR College of Liberal Arts		
Academic Plan:	<input type="text" value="013220217"/>		
Academic Advisor:	<input type="text" value="1167281"/> Peterson, Kathleen F		
Committee:	<input type="text"/>		
	<input type="checkbox"/> Advised by Committee		<input type="checkbox"/> Must Approve Enrollment
	<input type="checkbox"/> Must Approve Graduation		<input type="checkbox"/> Graduation Approved

'Advisor Role:	Major Advisor	'Advisor Number:	<input type="text" value="2"/>
'Academic Career:	UGRD Undergraduate		
'Academic Program:	17UGR College of Liberal Arts		
Academic Plan:	<input type="text" value="068820217"/>		
Academic Advisor:	<input type="text"/>		
Committee:	<input type="text" value="PYSLGY"/> Physiology		
	<input checked="" type="checkbox"/> Advised by Committee		<input type="checkbox"/> Must Approve Enrollment
	<input type="checkbox"/> Must Approve Graduation		<input type="checkbox"/> Graduation Approved




'Advisor Role:	Major Advisor	'Advisor Number:	<input type="text" value="3"/>
'Academic Career:	UGRD Undergraduate		
'Academic Program:	17UGR College of Liberal Arts		
Academic Plan:	<input type="text" value="013220217"/>		
Academic Advisor:	<input type="text"/>		
Committee:	<input type="text" value="BIOSCI"/> Biological Sci Advising (CLA)		
	<input checked="" type="checkbox"/> Advised by Committee		<input type="checkbox"/> Must Approve Enrollment
	<input type="checkbox"/> Must Approve Graduation		<input type="checkbox"/> Graduation Approved



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




Quick Steps – Adding Additional Advisor/s to Existing Advisor/s


1. On the Search page, enter the ID for the student and click Search.
2. Click the UPPER  button to add a new row. All information will ‘roll’ forward. Note that the Effective Date is automatically today.
3. Enter the appropriate Effective Date - if possible, use the term start date.
4. Click one of the LOWER  buttons to add a new row.
5. One the new row, Advisor Role will default to Advisor. Change this value as needed.
6. Select active Academic Career from  button.
7. Select active Academic Program (required) and Plan (not required).
8. Enter advisor ID. Or, if unknown, use  button to search for the Advisor’s ID.
9. Save the page.



Student Advisor




Student Name _____ Student ID _____   


Find | View All First  1 of 3  Last


*Academic Institution:  Univ of Minnesota, Twin Cities  


*Effective Date: 


Find First  1-5 of 5  Last

*Advisor Role:  *Advisor Number:  

*Academic Career:  Undergraduate

*Academic Program:  College of Liberal Arts




Academic Plan:  Physiology B A


Academic Advisor:  Peterson, Kathleen F


Committee:


Advised by Committee Must Approve Enrollment


Must Approve Graduation Graduation Approved

*Advisor Role:  *Advisor Number:  

*Academic Career: 

*Academic Program: 


Academic Plan: 

Academic Advisor: 

Committee:

Advised by Committee Must Approve Enrollment

Must Approve Graduation Graduation Approved



Quick Steps - Removing an Advisor or Committee:

1. On the Search page, enter the ID for the student and click Search.
2. Click the UPPER button to add a new row. All information will 'roll' forward. Note that the Effective Date is automatically today.
3. Enter the appropriate Effective Date - if possible, use the term start date.
4. Locate the advisor/committee row that is to be deleted.
5. Click the button on that row. Click 'OK' to verify the row is to be deleted.
6. Save the page.

Quick Steps - Updating the Advisor page to reflect a new Program and/or Plan

Information that has been updated on the Program Plan pages must be updated on the Student Advisor page. If this information is not updated on the Advisor page, advisors will not appear on the transcript and advising reports from UM Reports may not include advisee information.

1. On the Search page, enter the ID for the student and click Search.
2. Click the UPPER button to add a new row. All information will 'roll' forward. Note that the Effective Date is automatically today.
3. Enter the appropriate Effective Date - if possible, use the term start date.
4. Advisor role will default to Advisor. Change this value as needed.
5. Select active Academic Career from lookup search button or accept default career.
6. Select active Academic Program and/or new Plan.
7. Accept current advisor if it is to remain the same; otherwise enter new advisor ID over old.
8. Save the page.