Advisor Assignments Manual (updated 07/20/2018)

This tutorial explains how to use Enroll and Pay to manage assignments of advisors or advising committees to students and allow those assignments to display in the myKU Portal and Enroll and Pay. If you use the process described below, the advisor information in your file is loaded into Enroll & Pay for the corresponding students, and then will be displayed in the Academics Tab section of the Online Advising Tool for both students and approved advisors to view. The advisor information also displays in the Student Center in Enroll & Pay.

Things to Remember

A few important things to remember about loading advisors:

1. **Advising Committees Can Be Loaded.** If you have a group of advisors who can all see a given student, it is best to create an advising committee. You can contact Student Information Systems (SIS) to request this. Simply give the name you want your committee to be called and provide the names of the committee members. SIS will notify you when your committee is set up and ready to use. Anytime you need to **update** the committee member list, you can also contact SIS to do this. ***NOTE: The members of the committee must all have EMPLID's in Enroll & Pay.***

2. **Any Previous Assignments for All Advisors or all Committees in Your File Are <u>Removed</u>.** If you load a student assignment for an advisor or a committee which have any previously existing students assigned to them, all existing assignments for the advisor or committee are removed from Enroll and Pay. Your file's advisor or committee assignments are then processed. Therefore, if you want to retain any existing advisor or committee assignments in the system, Enroll & Pay, you will need to put them into your file.

3. **Each Advisor or Committee Should Only Appear in File/s from a Single Advising/Academic Unit.** This means that, if you share an advisor/committee with another academic unit, you will need to coordinate your advisor/committee loads between yourself and the other unit's advisor/committee loads so that only one unit loads the assignments for that advisor/committee.

4. **The File Must Have a Header Row.** The system always skips the first row of the document.

5. **Advisor Last Names You Use in Your File Must Match What is in Enroll & Pay for Them to Load.** If an advisor has changed their last name recently, make sure they contact the Registrar's Office to arrange for a name change in Enroll & Pay.

Step 1: Opening/Creating Your File

In order to load advisors into Enroll & Pay, you must first create a (or modify an existing) .CSV file that contains the necessary assignments. Contact Student Information Systems (SIS) if you would like a template to use. Start or open a .CSV file similar to the screenshot below, with the following columns (in order):

Advisor Assignments Manual (updated 07/20/2018)

1. **Advisor EMPLID OR Committee ID**—The 7-digit EMPLID of the academic advisor or the committee code of your advising committee in Enroll & Pay. If you put in an older ID without a leading zero, the system should automatically add a zero. ***NOTE: The EMPLID is not necessarily the same as the advisor's EMPLID in HR. Make sure you get the ID that is in the student records system. If you are unable to determine this ID, please contact Student Information Systems (contact information in Appendix VI of this document).***

2. **Advisor Last Name OR the Committee Description** —The academic advisor's last name or the advising committee description. The first three characters of the Advisor name will be checked with what is the preferred name in Enroll & Pay (not HR).

3. *Advisor Role*—This is the role of the advisor that corresponds with the type of appointment you want the student to be able to schedule with the advisor/committee. See Appendix V for a list of available roles. Contact SIS if you need another role added. ***NOTE: If using "Delete Advisor", make sure you populate this column with an available advisor role.***

4. **Student EMPLID OR "Delete Advisor"**—This can be either the student's 7-digit EMPLID in Enroll & Pay or the words "Delete Advisor". If you put "Delete Advisor" in this row, it will remove all students for this advisor regardless of career/program/etc, and you do not need to populate the rest of the columns in this row. Use the "Delete Advisor" if you do not plan to reassign the advisor to any other students.

5. **Student Last Name**—The student's Primary last name in Enroll & Pay. The first three characters will be checked against what is in Enroll & Pay (not HR).

6. **Student Academic Career**—The student's academic career in Enroll & Pay. ***NOTE: The student must be active (current or future) in this career for them to be assigned an advisor for said career.***

7. **Student Academic Program**—The student's academic program in Enroll & Pay. ***NOTE: The student must be active (current or future) in this program for them to be assigned an advisor for said program.***

8. **Student Academic Plan**—The student's academic plan in Enroll & Pay. The plan is not a required entry on this file. ***NOTE: The student must be active (current or future) in this plan for them to be assigned an advisor for said plan.***

(In the screenshot below, BUGL is a committee with the description "Business Undergraduate Advising". Also in the screenshot, Advisor "Pickerel" is no longer advising students, therefore the file has "Delete Advisor" next to his EMPLID and name.)

Advisor Assignments Manual (updated 07/20/2018)

	A	B	C	D	E	F	G	H
	Advisor EMPLID	Advisor LastName	Role	StudentEMPLID	Student LastName	Acad Career	Acad Prog	Acad Plan
2	123456	Busard	CLASU Probation Advisor	1111111	Nauman Hamaker	UGDL	CLASU	COMSA-BGS
3	123456	Busard	CLASU Probation Advisor	2222222	Ernesti	UGDL	CLASU	UNDECIDEDA
4	123456	Busard	CLASU Probation Advisor	2333333	Morlan	UGDL	CLASU	UNDECIDEDA
5	123456	Busard	CLASU Probation Advisor	2444444	Kaspar	UGDL	CLASU	UNDECIDEDA
6	123456	Busard	UAC Advisor	2555555	McKay	UGDL	CLASU	SOCA-BA
7	123456	Busard	UAC Advisor	2666666	Salamone	UGDL	CLASU	SOCA-BGS
8	234567	Cates	CLASU Graduation Advisor	2777777	Hedge	UGDL	BUSU	
9	123456	Busard	CLASU Graduation Advisor	2888888	Guetersloh	UGDL	CLASU	PSYCA-BGS
10	123456	Busard	CLASU Graduation Advisor	2999999	Passio	UGDL	CLASU	
11	345678	Pickerel	CLASU Graduation Advisor	Delete Advisor				
12	BUGL		Business Undergr A Advisor	2000000	Byrne	UGDL	CLASU	

If you are finished with your file, you must save it with the <u>exact title case</u> name "Advassign" followed by an underscore (**very important**), then followed by your academic unit identifying information (e.g. "UAC", "CLASU", "BUSU", "EDUCU","JOURU", "PHARU", etc). An example of a filename is "Advassign_CLASU.csv" or "Advassign_UAC.csv". If you are working in MS Excel, you must save it as a .CSV file (click "OK" through the message). ***NOTE: It is mandatory that you save the file in a confidential shared drive and not your hard drive.*** Once you close out of Excel and you have saved your .CSV already, you can say "no" if it asks you to save it again.

Step 3: Drag Your File into the Prd_Drop_Box

Now that you have created and saved your .CSV file, you can drag and drop your file into the Production Shared Folder Drop Box. Follow these steps:

1. Go into your "My Computer" or "Windows Explorer" and locate the **"PRD_Share"** network place. If you do not see it, you may need to request access. Contact SIS for information on how to access this network place (see Appendix VI for contact information). Once you locate and open it, it is helpful to add it to your favorites. You can scroll to the upper left corner of Windows Explorer and right-click the "Favorites" star, and then click on "Add Current Location to Favorites" (see highlighted item on screenshot below).
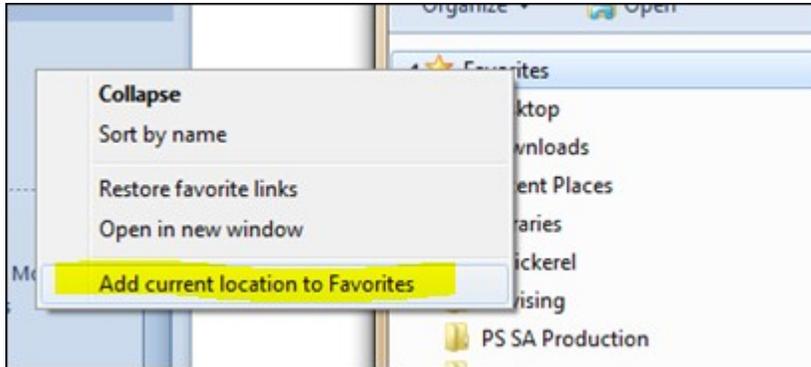
2. Find the "PRD_Drop_Box" folder within the PRD_Share folder. (If you cannot locate it, contact SIS for help.) Open up your shared drive with your advisor assignment file icon visible and then drag the file over to PRD_Drop_Box (see the screenshot below on the next page). If you get an error message or are otherwise unable to complete the file drop, contact SIS for help.

Advisor Assignments Manual (updated 07/20/2018)
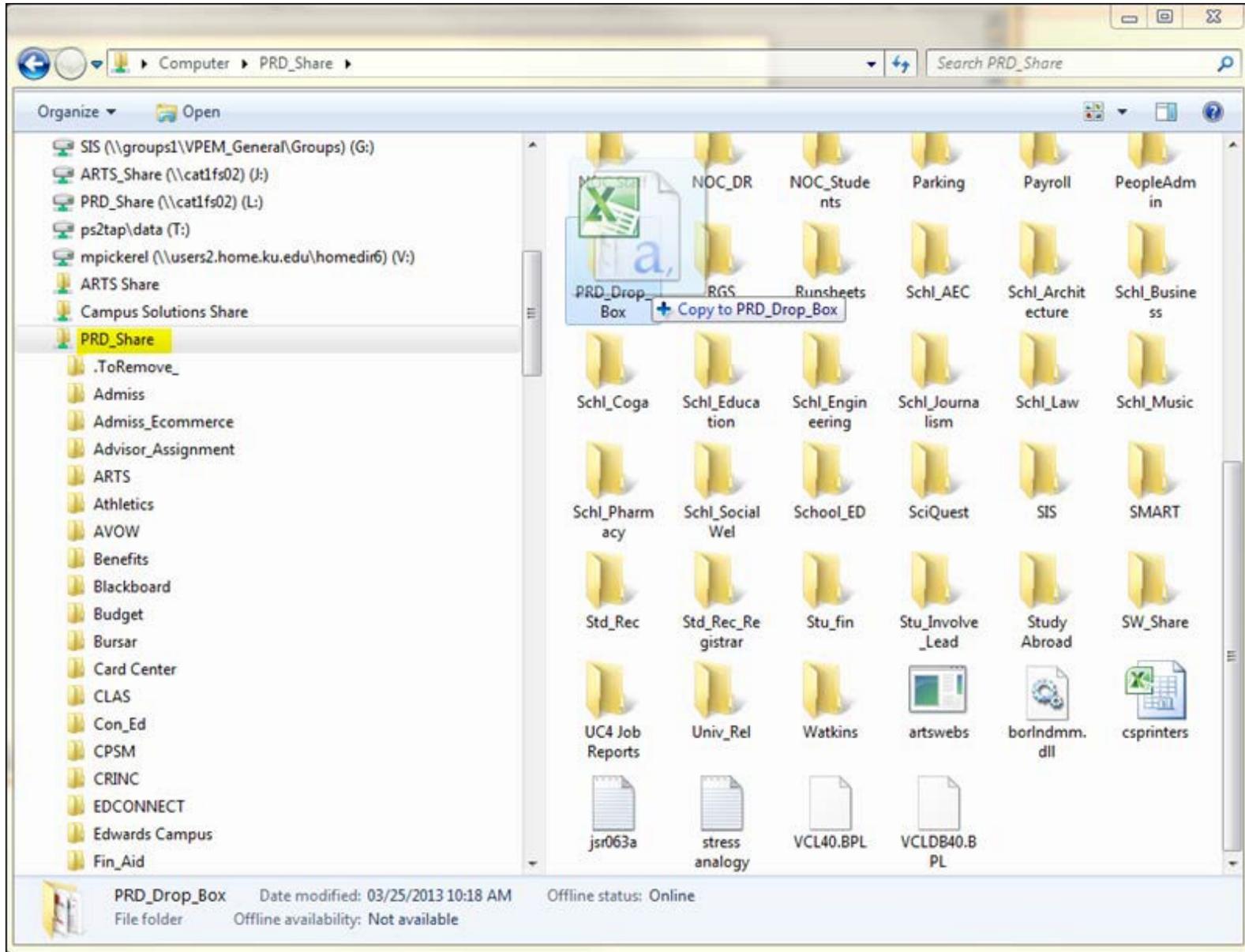
Advisor Assignments Manual (updated 07/20/2018)

Step 4: Let the Job Run

Once you have created, saved and moved your file to the drop box, **you need to wait for the job to run at 7PM that evening (the job runs Monday through Friday only)**.

If you have an immediate need to correct a problem, please contact SIS.

Step 5: Check the Error Report

Now that your job has completed, you can go check for errors. The error file will be located in the PRD_Share network place (same as the drop box was). **Simply go into PRD_Share and locate the ADVISOR_ASSIGNMENT folder. Inside the "Arch" (Archive) folder (see screenshot below).**
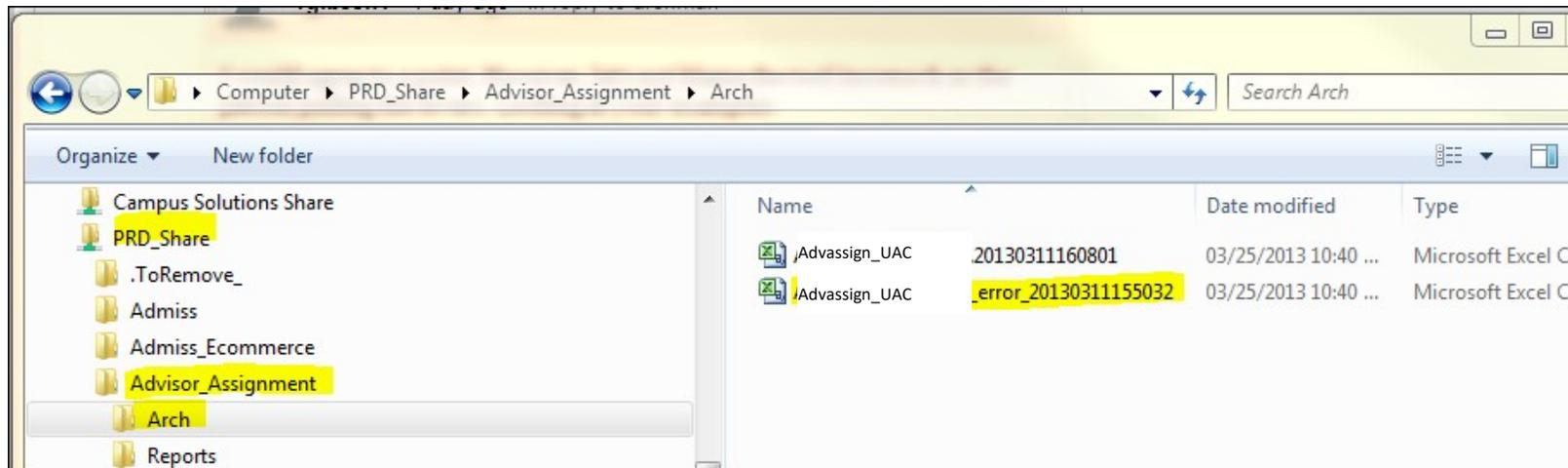
You will find two files:

1. One will match your filename, and it will have just a date and time after it. This is simply your file that was loaded along with the date and time it was loaded appended to the file name. You can go in and edit this file and re-use it for future file loads if you desire.
2. One will match your filename, and it will have an **"_error_"** and a date and time appended to its filename. This is the error report and totals of records in input, records inserted, and error records. If you open it, you will find errors that occurred while loading your report with accompanying descriptions of each error in the far-right-hand column (see screenshot on the next page for a sample). You can then go back to your previously loaded file, make your edits, and repeat steps 1-4.

Advisor Assignments Manual (updated 07/20/2018)

Advassign_UAC_error_20130503165821 [Read-Only]										
	A	B	C	D	E	F	G	H	I	J	K
1			Validation Errors Report For Records in Advising Unit .csv file								
2	Database: CSTST		Report ran on: 03-May-2013 04:58 PM								
3											
4	Advisor_id	Advisor/Con	Advisor Role	Student ID	Student N	Acad Care	Acad Prog	Acad Plan	Error Message		
5	1234567	Busard	CLASU Probation Advisor	1111111	Nauman H	UGDL	CLASU	COMSA-BGS	Plan not exist in Enroll & Pay.		
6	1234567	Busard	Advisor	2222222	McKay	UGDL	CLASU	SOCA-BA	Plan not exist in Enroll & Pay.		
7	2345678	Cates	CLASU Advisor	3333333	Hedge	UGDL	BUSU		Program not exist in Enroll & Pay.		
8											
9											
10	Total Records in input file: 28										
11	Total Records inserted into ps_ku_advisor_temp: 25										
12	Total error records in output file: 3										
13											
14											

Step 6: Check Other Reports (Optional)

Once your job completes, the following jobs will run automatically:

1. Students Without Advisors (JAA009)

3. Committee Member Report (JAA011)

See the Appendices for these reports and their output files and locations.

Editing Individual Advisor Assignments

Advisors should be added to students' records by the file load described above. However, there may be times when you must go in and make edits to individual advisor assignments. To do this, complete the following steps:

1. Login to Enroll & Pay.

2. Navigate to the following page: ***Records and Enrollment >Student Background Information>Student Advisor***. If you do not have access to do this, please contact SIS (see Appendix VI for more information).
3. Enter the student's EMPLID that you wish to edit. When you locate your student, the below screen displays (* are required).
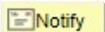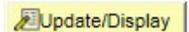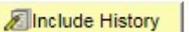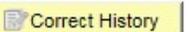
a. *Effective Date*—This is the date the advisor(s) or committee(s) was/were assigned. It does not affect when the assignment will display in the KYou Portal. **NOTE: *Leave this area of the screen alone when making adjustments to your advisor assignments.***
b. **Advisor Role**—This is related to the type of appointments the advisor allows to be scheduled in MySuccess at some point (see Appendix V for more details and some available roles in the system).

c. **Academic Career/Program/Plan**—This is the Career/Program/Plan the advisor was assigned under, and the student must have been active in this Career/Program/Plan at the time of the assignment. If you wish to change the Career/Program/Plan of the advisor assignment here, the student must be or have been active in it at some point in their time at KU. If you choose an inactive program/plan for the student, the advisor assignment will display in the Mismatch Report (see Appendix II).

d. **Academic Advisor**—This contains the EMPLID in Enroll & Pay of the assigned Advisor. If the student is advised by an individual advisor, clicking the magnifying glass next to the field will allow you to search for anyone in Enroll & Pay by name or by EMPLID and replace the current entry. (This field is disabled when "Advised by Committee" field is checked. You must un-check that field to remove the Committee assignment and change the assignment to an individual advisor.)

e. **Committee**—This contains the committee code if the "Advised by Committee" field is checked. Clicking the magnifying glass next to the field will allow you to search for another committee and replace the current entry. (This field is disabled when "Advised by Committee" is unchecked. You must check that field to remove the individual advisor assignment and change the assignment to a committee.)

f. **Advised by Committee**—This is the checkbox that controls whether the advising appointment can be set up as an individual or as a committee. If it is checked, the "Committee" field is enabled and the "Academic Advisor" field is disabled. If it is unchecked, the "Committee" field is disabled and the "Academic Advisor" field is enabled. ***NOTE: All other checkboxes next to this one must be left unchecked***.

g. **Save**—This button lets you save your changes.

h. **Correct History**—You must click this button in order to make any changes.

4. When your student comes up, you must click on the "Correct History" button to make any changes to the record.

5. Make your changes to the record.

6. Click on the "Save" button to lock in your changes.

Advisor Assignments Manual (updated 07/20/2018)

Appendix I: Students Without Advisors Report (Runs each day automatically after all advisor assignment file loads are complete)

This report is created after the nightly advisor loads have completed. Each program has a report created for it.

You can go into PRD_Share/ADVISOR_ASSIGNMENT/Reports and locate the file. It will be called "Students_Without_Advisor_<program>", where <program> is the academic program(s) of the student(s). Active students who are not currently assigned an advisor in your program specified will pull into the report. An example of the report is shown below.

Students_Without_Advisor_CLASU [Read-Only]
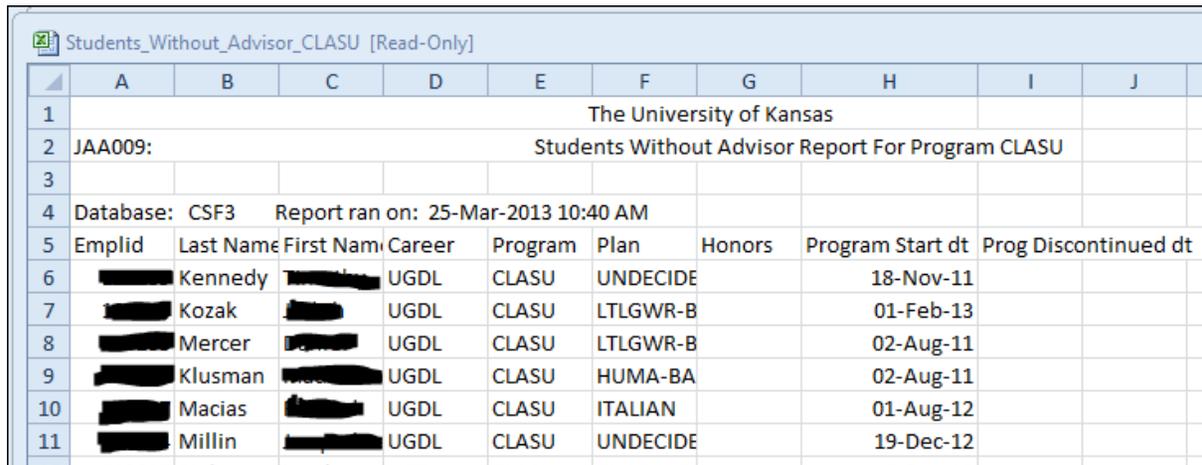
	A	B	C	D	E	F	G	H	I	J
1					The University of Kansas					
2	JAA009:				Students Without Advisor Report For Program CLASU					
3										
4	Database: CSF3		Report ran on: 25-Mar-2013 10:40 AM							
5	Emplid	Last Name	First Name	Career	Program	Plan	Honors	Program Start dt	Prog Discontinued dt	
6		Kennedy		UGDL	CLASU	UNDECIDE		18-Nov-11		
7		Kozak		UGDL	CLASU	LTLGWR-B		01-Feb-13		
8		Mercer		UGDL	CLASU	LTLGWR-B		02-Aug-11		
9		Klusman		UGDL	CLASU	HUMA-BA		02-Aug-11		
10		Macias		UGDL	CLASU	ITALIAN		01-Aug-12		
11		Millin		UGDL	CLASU	UNDECIDE		19-Dec-12		

Advisor Assignments Manual (updated 07/20/2018)

Appendix II: Mismatch Report (Runs each day automatically after all advisor assignment file loads are complete)

This report automatically runs after an advisor load is completed. This report is run for all students, so any students that have mismatched programs/plans with the advisors who are assigned to them will show in this report. A mismatch could involve a student becoming inactive in a program/plan in which they were assigned an advisor or changing to another program/plan that renders a previous advisor assignment invalid.

To view this report, you can go into PRD_Share/ADVISOR_ASSIGNMENT/Reports and locate the file called "jaa010". It is a .CSV file that contains all program/plan mismatches for any assignments—either the student is no longer active at KU, or they have changed their program/plan. See an example of the report in the screenshot below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	JAA010:			Mismatch in Career/Program/Plan in STDNT_ADVR_HIST Record										
2	Database:	Report ran on 25-Mar-2013 10:45 AM												
3														
4	Advisor/C	Advisor La	Advisor Fi	Career	Program	Plan	Student ID	Student La	Student Fi	Student C	Student P	Student P	Honors	comments
5	▬▬▬	Mason	Kathleen	UGDL	CLASU	GISTA-BA	▬▬▬	Bray	▬▬	UGDL	CLASU	POLSA-BA		
6	▬▬▬	Mason	Kathleen	UGDL	CLASU	PJORA	▬▬▬	Smedley	▬▬			PJORA		
7	▬▬▬	Mason	Kathleen	UGDL	CLASU	POLSA-BG	▬▬▬	Albani	▬▬▬	UGDL	BUSU	UNDECIDEDA		
8														
9														
10	Total mismatch records found: 3													

Advisor Assignments Manual (updated 07/20/2018)

Appendix III: Committee Member Report (Runs each day automatically after all advisor assignment file loads are complete)

This report automatically runs after an advisor load is completed.

To view the report, you can go into PRD_Share/ADVISOR_ASSIGNMENT/Reports and locate the file called "jaa011". It is a .CSV file that contains **all committees**, regardless of affiliation, so you will have to cull out any committees not in your academic unit and save the file separately in your secure shared drive if you wish to keep a copy. Each committee member is listed on a separate row.
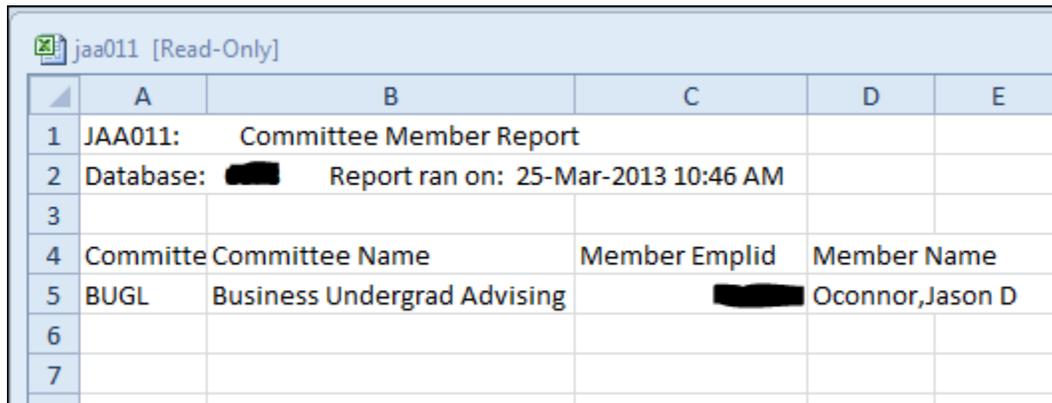
	A	B	C	D	E
	jaa011 [Read-Only]				
1	JAA011:	Committee Member Report			
2	Database: ▬	Report ran on: 25-Mar-2013 10:46 AM			
3					
4	Committe	Committee Name	Member Emplid	Member Name	
5	BUGL	Business Undergrad Advising	▬	Oconnor,Jason D	
6					
7					

Advisor Assignments Manual (updated 07/20/2018)

Appendix IV: The Assigned Report (Runs Upon Request)

This is a job that runs on request. It must be requested by 3:00pm. In order to retrieve your assigned advisors, you must provide an input file. This input file can be a list of **Advisor EMPLIDs** (again, from Enroll & Pay and not HR) or academic programs (CLASU, ARTSU, BUSU, etc) or both combined. You must save the file as jaa012_input_<text>.csv. where <text> can be a word or person name that distinguishes your file from other advisors' files. **NOTE: This file does not need a header row.** An example is shown below.
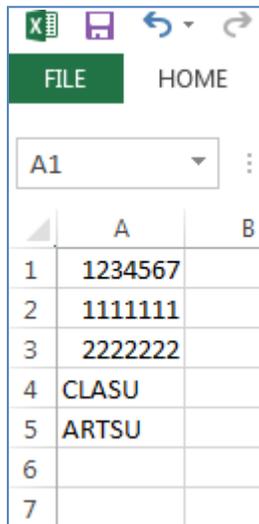
After creating your input file and placing it in the PRD_Drop_Box folder, you can request that the **CS.AA.ASSIGNED.REPORT** job be run to get the complete list of advisor assignments in the system for your advisors/committees/programs listed in your input file.

To: prodrequest@ku.edu

Subject: CS.AA.ASSIGNED.REPORT

Message: Hello, please run CS.AA.ASSIGNED.REPORT on jaa012_input_<text>.csv in Production.

Thanks

Advisor Assignments Manual (updated 07/20/2018)

Once you get the response back from Production Control saying that the job has completed, you can go into PRD_Share/ADVISOR_ASSIGNMENT/Reports and locate the file named "jaa012_output_<text> .yyyymmdd.csv" (yyyymmdd is the date it ran, starting with year and ending in month and day) It is a .CSV file that contains, along with the title and date it ran, all advisor assignments in a similar format that you would use to assign them.
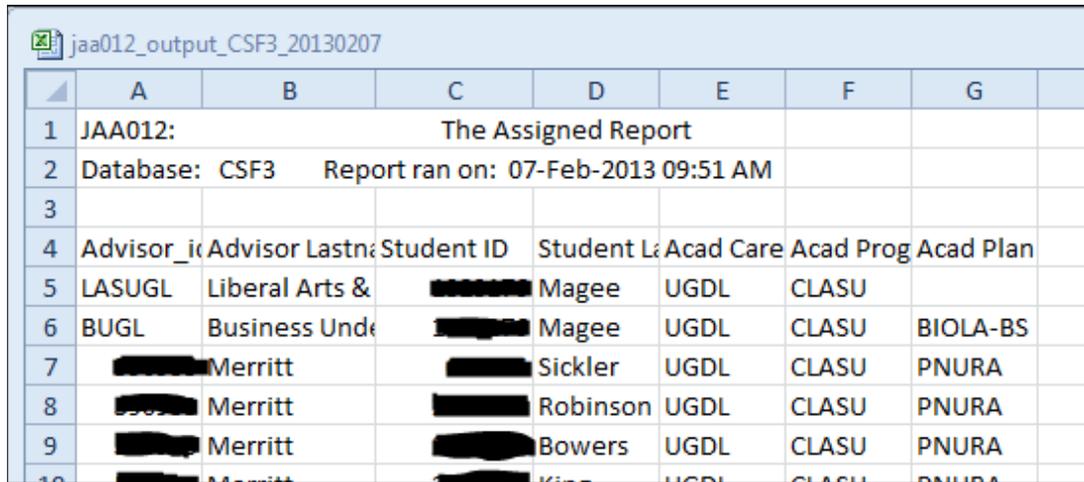
	A	B	C	D	E	F	G
1	JAA012:		The Assigned Report				
2	Database: CSF3		Report ran on: 07-Feb-2013 09:51 AM				
3							
4	Advisor_id	Advisor Lastna	Student ID	Student La	Acad Care	Acad Prog	Acad Plan
5	LASUGL	Liberal Arts &	▉▉▉▉▉	Magee	UGDL	CLASU	
6	BUGL	Business Unde	▉▉▉▉	Magee	UGDL	CLASU	BIOLA-BS
7	▉▉▉▉ Merritt		▉▉▉▉▉	Sickler	UGDL	CLASU	PNURA
8	▉▉▉ Merritt		▉▉▉▉▉	Robinson	UGDL	CLASU	PNURA
9	▉▉▉ Merritt		▉▉▉▉	Bowers	UGDL	CLASU	PNURA

Advisor Assignments Manual

Appendix V: Advisor Roles

Advisor roles are used to allow students who are assigned advisors to create specific appointment types in the MySuccess system. Current roles available are:

- ARCHG Faculty Advisor
- ARCHG Advisor
- ARCHU Faculty Advisor
- ARCHU Advisor
- BUSU Edwards Advisor
- BUSU Advisor
- ARCHU Design Advisor
- EDUCU Advisor
- EDUCU Edwards Advisor
- Graduate Career Advisor
- Honors Advisor
- Hawk Link Advisor
- International Student Services
- JOURU Advisor
- Graduate Health Prof. Mentor
- Graduate Nursing Mentor
- Undergr. Health Prof. Mentor
- Undergrad Nursing Mentor
- CLAS Graduate Academic Advisor
- Thesis/Dissertation Advisor
- CLASU Advisor
- CLASU Edwards Advisor
- CLASU Faculty Advisor

Advisor Assignments Manual (updated 07/20/2018)

- CLASU Graduation Advisor

- CLASU LEAD Advisor

- CLAS Online Advisor

- CLASU Probation Advisor

- MEDG Faculty Mentor

- MUSCU Advisor

- ENGRG Advisor

- ENGRU Advisor

- ENGRU Edwards Advisor

- ENGRU Faculty Advisor

- Qualifying Exam Committee

- SOCWG Advisor

- SOCWG Faculty Advisor

- Thesis Committee

- UAC Advisor

- Undergrad Career Advisor

Advisor Assignments Manual (updated 07/20/2018)

When you are creating an advisor assignment file, **be sure to use the "Long Name" of the advisor role** (<mark>highlighted</mark> in the picture above). If you need to create a new role that corresponds with a particular appointment type, contact SIS (in Appendix VI).

Appendix VI: Support Contact Information

If you need to:

- Gain assistance accessing the PRD_Drop_Box or any other PRD_Share folders,
- Get assistance with Enroll & Pay Advisor EMPLID,
- Have an Advising committee created,
- Update the members of an Advising committee,
- Update/Create a new Advisor Role,
- Get assistance with formatting an Advisor assignment .CSV file,
- Have a question answered, or
- Troubleshoot an advising assignment issue

Feel free to contact SIS: sis_advising@ku.edu