ADVISOR MAINTENANCE

The SGAADVR form allows a student to be associated with an unlimited number of advisors for an effective term range. Multiple advisors may be designated for any student. A general learner record must exist in order to attach an advisor to a student.
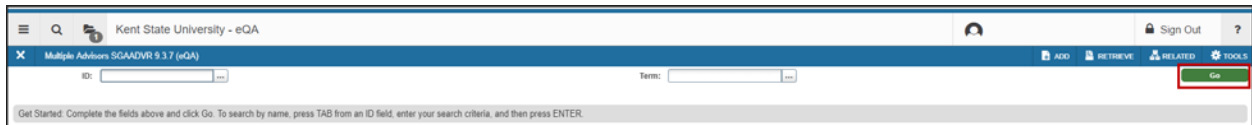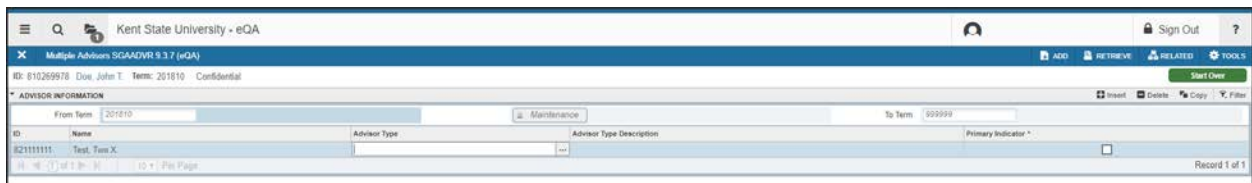
Adding an Advisor to a Student

1. Go to **SGAADVR**

2. Enter the student's Kent State ID number.

3. Your cursor will automatically move to the _TERM_ field. Enter the effective term (e.g. 201610) of the change.
   ➢ This is either the term a new advisor is being added or the effective term of a change that is being made to the student's record.

4. Click Go in the upper right hand corner of the page to move to the Advisor Information block.

5. Enter the Kent State ID number of the advisor you are going to attach to the student. Once the Kent State ID number is entered, the Advisor's name will be brought into context automatically.

6. Your cursor will automatically move to the _ADVISOR TYPE_ field.

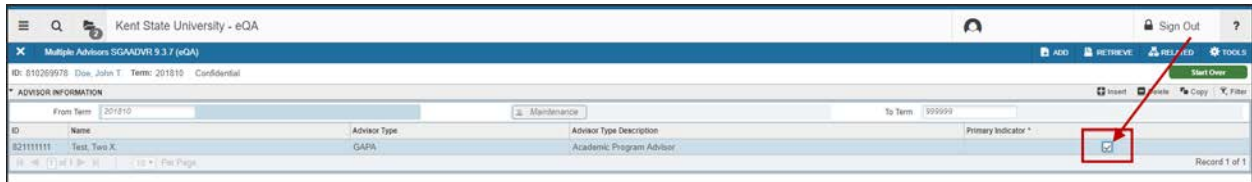7. For the available values of Advisor types, click on the ellipses for a list of values.
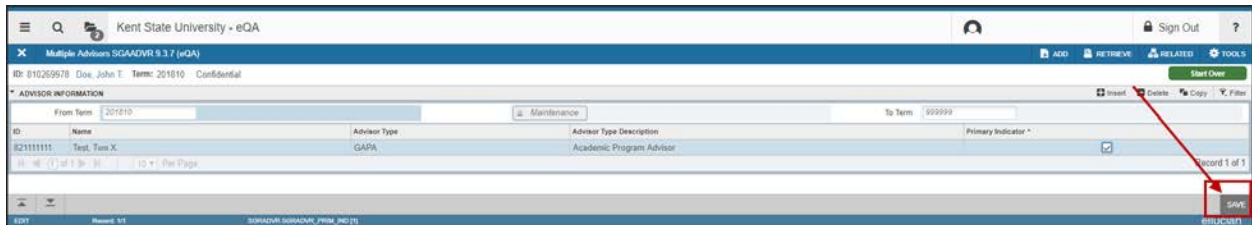
8. Choose the appropriate Advisor type and click OK.
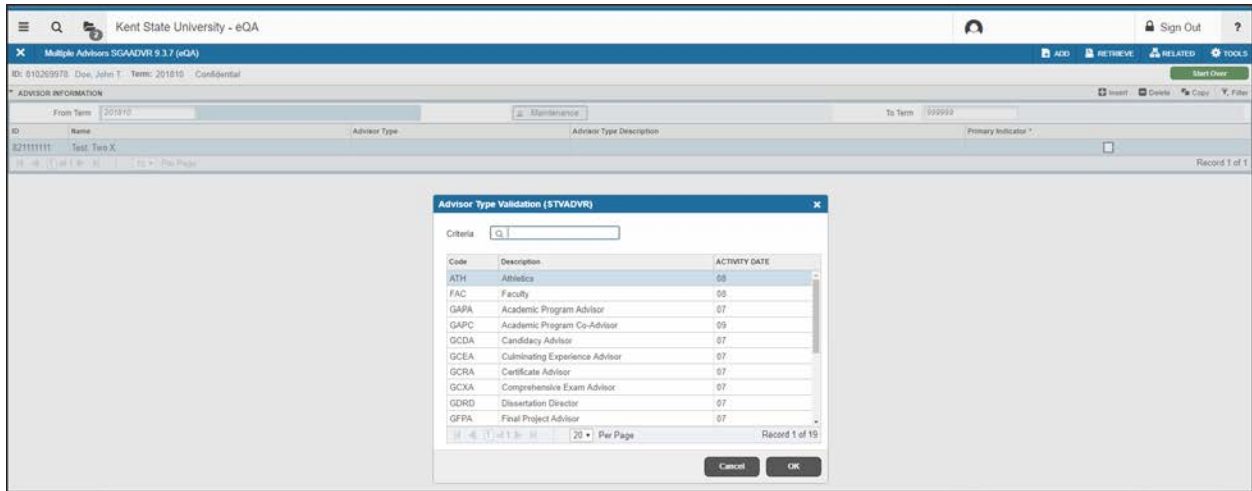
9. The primary indicator must be checked. If you attempt to save without the indicator being checked, you will receive an error message at the bottom of the form stating primary advisor must be identified.

10. Click on the Save button in the bottom right-hand corner of the form to save your transactions.

Searching for an Advisor

1. On SGAADVR, Enter the student's Kent State ID number.

2. Your cursor will automatically move to the _TERM_ field. Enter the effective term (e.g. 201580) of the change.
   ➢ This is either the term a new advisor is being added or the effective term of a change that is being made to the student's record.

3. Click Go in the upper right hand corner of the page to move to the Advisor Information block.

4. Click on the ellipses in the ID field to search for an advisor.

5. This will bring you to SIAIQRY – Faculty/Advisor Query form. Do _NOT_ remove the Advisor checkmark.

6. Click Go in the upper right hand corner of the page to move to the next block.

7. Your cursor will be in the _ID_ field.

8. Tab twice to move to the _LAST NAME_ field.

9. Enter the last name of the advisor you are looking for. The first letter of the last name must be a capitalized letter (e.g., Smith).

10. To narrow the search, tab to the *FIRST NAME* field and enter the first name of the advisor. The first letter of the first name must be a capitalized letter (e.g., Thomas).

11. To execute the query, press the F8 key on your keyboard or click on the Go button on the right side of your screen.

12. This will bring you any individual who is marked as an advisor on the SIAINST form for the effective term you entered on the SGAADVR form.

13. If multiple people are listed, determine which advisor is to be attached to the student and double click on that advisor's KSU ID number. This will back walk the advisor to the SGAADVR form.

> **NOTE: All university employees who have been given access to FlashFAST (SSB self service) to be able to perform their job are classified in Banner as "Advisors". This is the only process we have to allow the university community access to student information. Please be very careful who you choose to be a student's advisor.**
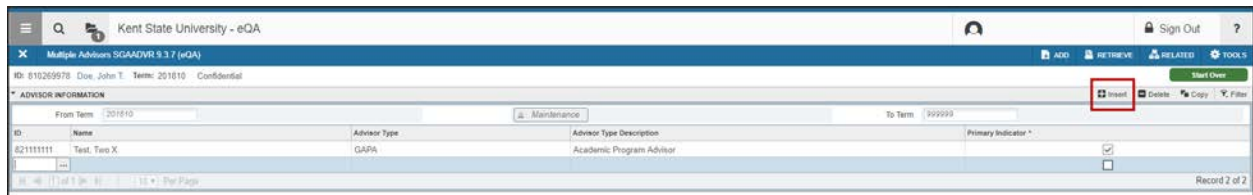

14. Complete the form by adding the advisor type and the primary indicator and click on the Save button in the bottom right-hand corner of the form to save your transactions.

To Add an Additional Advisor

When effective term for additional advisor is the same term as existing advisor:

1. Tab to the *TERM* field and enter the effective term of the addition of the second advisor.

2. Next block or click Go in the upper right hand corner of the page to move to the Advisor Information block.

3. The first advisor assigned will appear in the Advisor Information block.

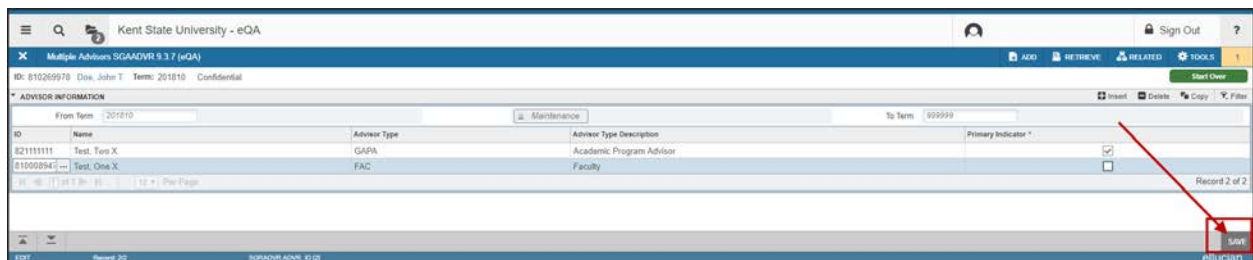4. Arrow down or click the Insert to enter another advisor.

5. In the *ID* field enter the Kent State ID number of the advisor being attached to the student or search for the advisor by clicking on the ellipses in the ID field to search for an advisor. Once the Kent State ID is entered, the advisor name will be brought into context automatically.

6. Enter the Advisor Type.

7. Only one advisor can be the primary. If needed, change the primary indicator to the new primary advisor.

8. Click on the Save button in the bottom right-hand corner of the form to save your transactions.


When effective term for additional advisor is for a future term:

9. Tab to the *TERM* field and enter the effective future term of the addition of the second advisor.

10. Next block

11. The first advisor assigned will appear in the Advisor Information block.

12. Click the Maintenance button in the center of the screen.

13. Click the Copy Advisor link. The From Term will change to the effective term in the key block.
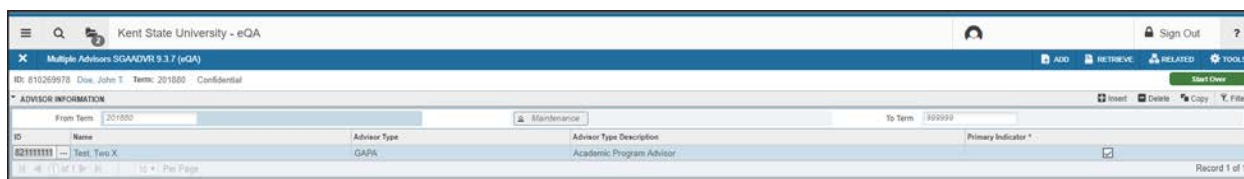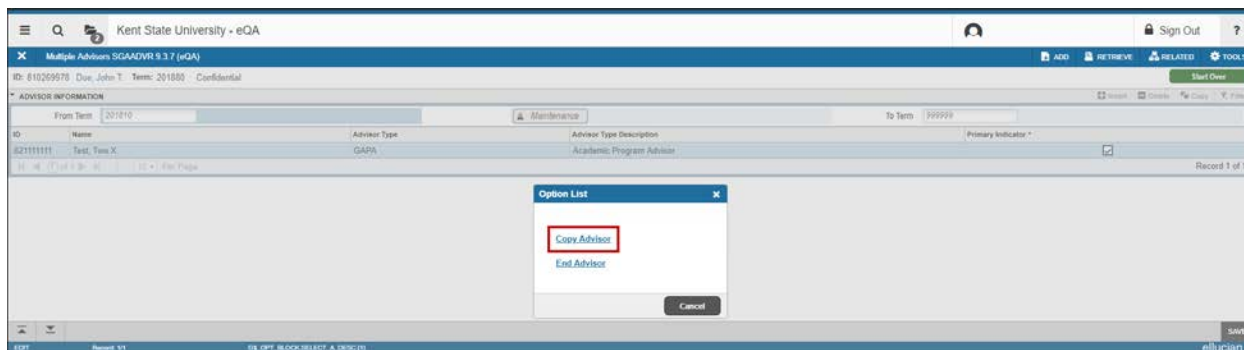
14. Arrow down or click the Insert to enter another advisor.

15. In the *ID* field enter the Kent State ID number of the advisor being attached to the student or search for the advisor by clicking on the ellipses in the ID field to search for an advisor. Once the Kent State ID is entered, the advisor name will be brought into context automatically.

16. Enter the Advisor Type.

17. Only one advisor can be the primary. If needed, change the primary indicator to the new primary advisor.

18. Click on the Save button in the bottom right-hand corner of the form to save your transactions.
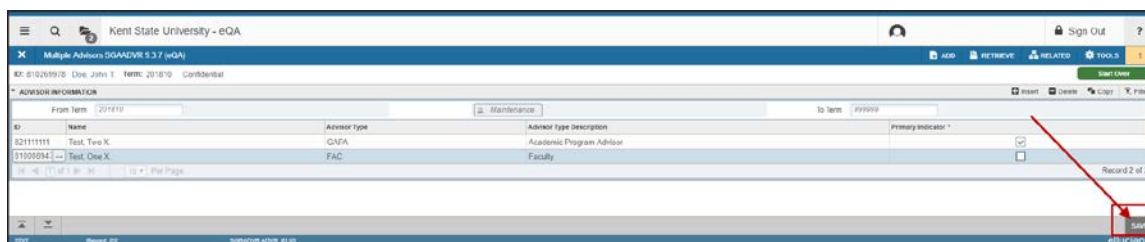
To Change an Advisor – Same Term

NOTE: This example is changing an advisor in the same term that the original advisor was assigned. Original advisor was assigned 201810.

1. Tab to the *TERM* field and enter the effective term of the change (201810).

2. Next block.

3. Click on the ID number of the advisor that you want to remove.

4. **Delete the existing advisor.** Click on the Delete button icon in the upper right corner of the page.

5. **Add the new advisor**. In the *ID* field enter the Kent State ID number of the advisor being attached to the student or search for the advisor by clicking on the ellipses in the ID field to search for an advisor. Once the Kent State ID is entered, the advisor name will be brought into context automatically.

6. Enter the Advisor Type

7. Add the Primary Indicator checkmark

8. Click on the Save button in the bottom right-hand corner of the form to save your transactions. You should receive a message that "2 records applied and saved".

To Change an Advisor – Future Term

NOTE: This example is changing an advisor for a future term (201880). The original advisor was assigned 201810.

1. Tab to the *TERM* field and enter the effective term of the change (201880).

2. Next block and click the Maintenance button.

3. Click the Copy Advisor link. The From Term will change to the effective term in the key block.

4. Your cursor will be in the *ID* field.

5. **Delete the existing advisor.** Click on the Delete button icon in the upper right corner of the page.

6. **Add the new advisor**. In the *ID* field enter the Kent State ID number of the advisor being attached to the student or search for the advisor by clicking on the ellipses in the ID field to search for an advisor. Once the Kent State ID is entered, the advisor name will be brought into context automatically.

7. Enter the Advisor Type.

8. Add the Primary Indicator checkmark.

9. Click on the Save button in the bottom right-hand corner of the form to save your transactions. You should receive a message that "2 records applied and saved".
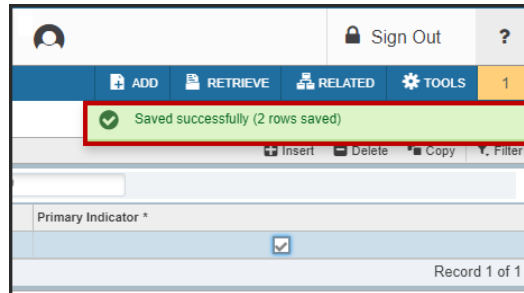
**Deleting an Advisor When There is More than One**

1. Tab to the *TERM* field and enter the effective term of the change.

2. If the change is for the **same term,** the original advisor was assigned, next block.

3. **Click on the ID number of the advisor that is going to be deleted**, click on the Delete button icon in the upper right corner of the page, and then click Save.

4. If the change is for a **future term**, in the Keyblock, tab to the *TERM* field and enter the future effective term of the delete. Then, Next Block and click the Maintenance button.
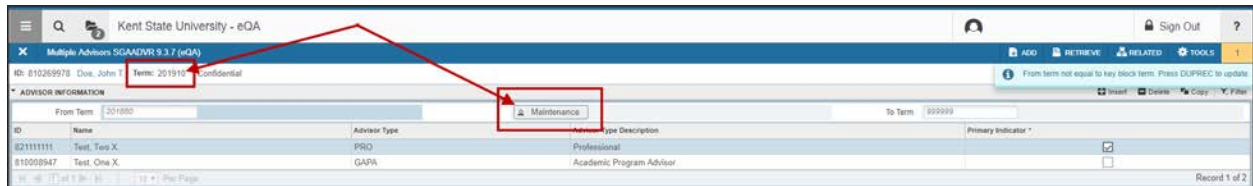
10. Click the Copy Advisor link. The From Term will change to the effective term in the key block.
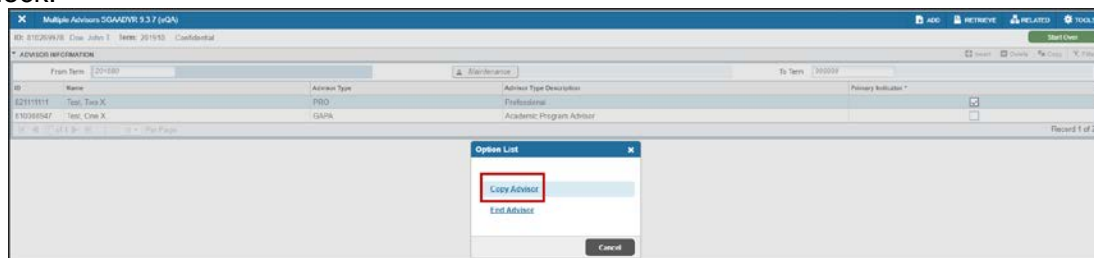
5. Your cursor will be in the *ID* field. **Click on the ID number of the advisor that is going to be deleted**, click on the Delete button icon in the upper right corner of the page.

6. If the primary advisor is being deleted, the advisor that is left needs to be marked as the primary advisor.

7. Click on the Save button in the bottom right-hand corner of the form to save your transactions.
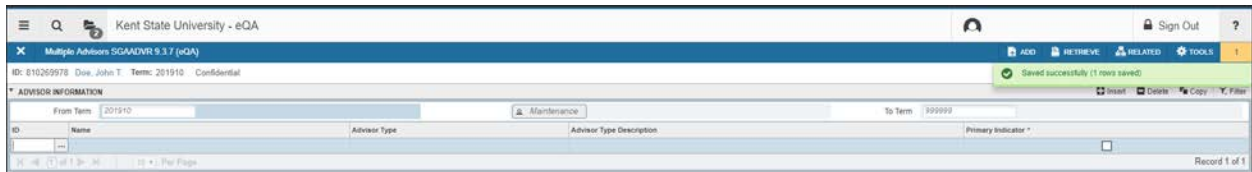
To Delete an Advisor When Only One Exists

1. Tab to the *TERM* field and enter the term the original advisor was assigned, next block.

2. Your cursor will be in the *ID* field. **Click on the ID number of the advisor that is going to be deleted**, click on the Delete button icon in the upper right corner of the page.

3. Click on the Save button in the bottom right-hand corner of the form to save your transactions. You should receive the message that 1 record applied and saved.