

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.

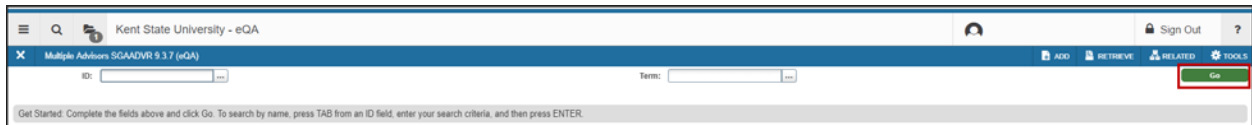
Adding an Advisor to a Student

1. Go to **SGAADVR**



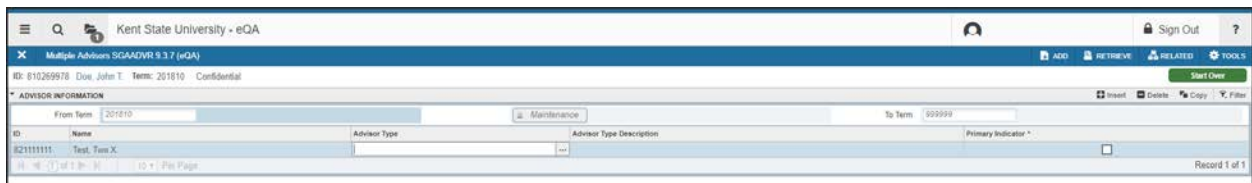
The screenshot shows the Kent State University eQA interface. The page title is "Kent State University - eQA". The breadcrumb trail is "Multiple Advisors SGAADVR 9.3.7 (eQA)". The form has two input fields: "ID:" and "Term:". There is a "Go" button in the upper right corner. Below the form, there is a "Get Started" message: "Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER."

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.



The screenshot shows the same Kent State University eQA interface as the previous screenshot. The "Go" button in the upper right corner is highlighted with a red box.

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.



The screenshot shows the Kent State University eQA interface with the "ADVISOR INFORMATION" block. The form displays the following information:

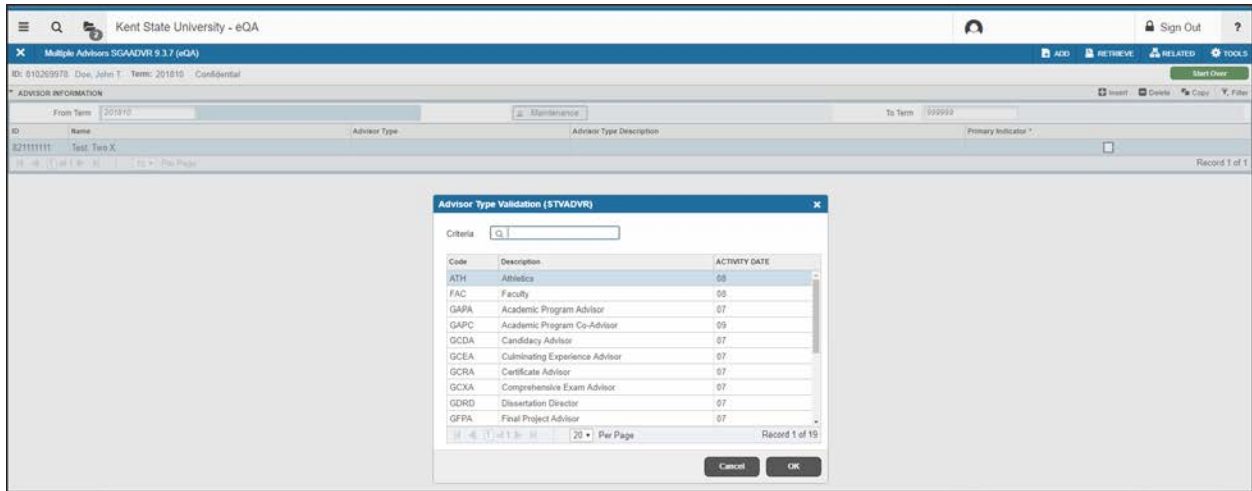
From Term		To Term	
201610		201610	

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator
821111111	Test, Test X			

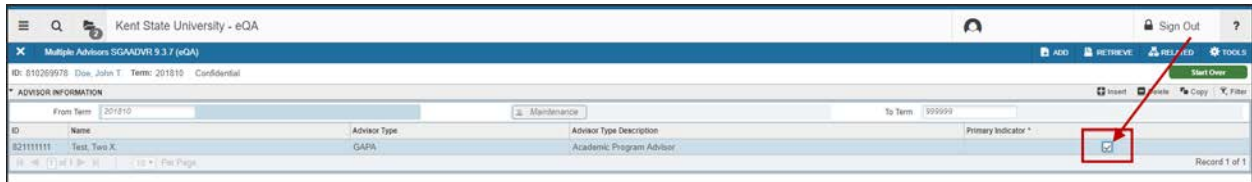
Record 1 of 1

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.

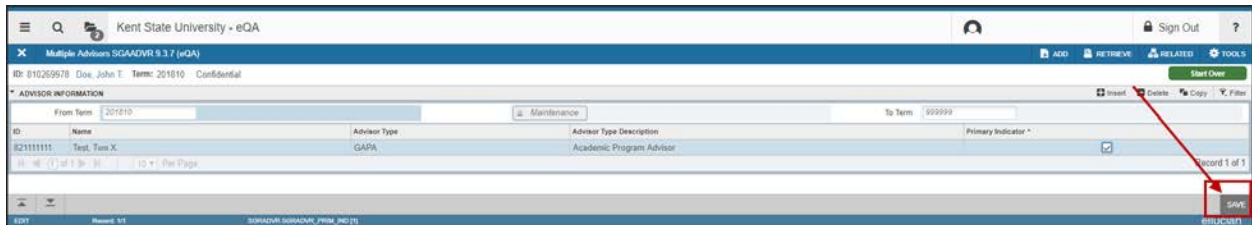
8. Choose the appropriate Advisor type and click OK.



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.

Kent State University - eQA

Multiple Advisors SGAADVR 9.3.7 (eQA)

ID: Term:

ADD RETRIEVE RELATED TOOLS

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

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

Kent State University - eQA

Multiple Advisors SGAADVR 9.3.7 (eQA)

ID: 815259976 Doe, John T. Term: 201510 Confirmed

Start Over

ADVISOR INFORMATION

From Term: 2010-03 To Term: 555555

Advisor Type: Maintenance Advisor Type Description: Primary Indicator *

Record 1 of 1

5. This will bring you to SIAIQRV – Faculty/Advisor Query form. Do *NOT* remove the Advisor checkmark.

Kent State University - eQA

Faculty/Advisor Query SIAIQRV 9.3.7 (eQA)

Term: 201510 Faculty:

Advisor: Category:

Staff Type: Contract Type:

Tenure Status: Status:

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

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

Kent State University - eQA

Faculty/Advisor Query SIAIQRV 9.3.7 (eQA)

Term: 201510 Faculty:

Advisor: Category:

Staff Type: Contract Type:

Tenure Status: Status:

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

7. Your cursor will be in the ID field.
8. Tab twice to move to the LAST NAME field.

Kent State University - eQA

Faculty/Advisor Query SIAIQRV 9.3.7 (eQA)

Term: 201510 Faculty: Advisor: Category: Staff Type: Contract Type: Tenure Status: Status:

Enter a query; press F8 to execute

FACULTY/ADVISOR QUERY

Basic Filter Advanced Filter

ID: Last Name: First Name: Middle Name: College: Add Another Field ...

Clear All Go

ID	Last Name	First Name	Middle Name	Faculty	Advisor	College	Department
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- 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).

- 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).

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

- 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.

- 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.

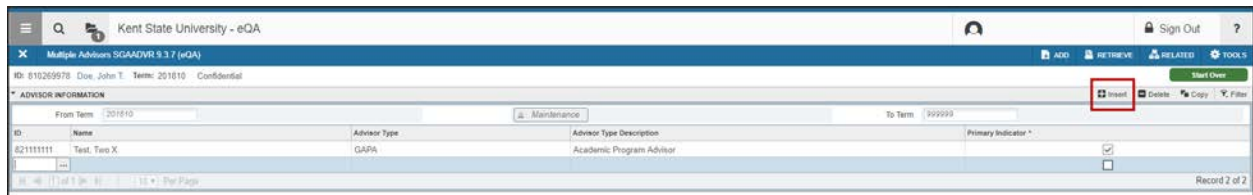


- Complete the form by adding the advisor type and the primary indicator and click on the Save button in the bottom right-hand corner of the form to save your transactions.

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.

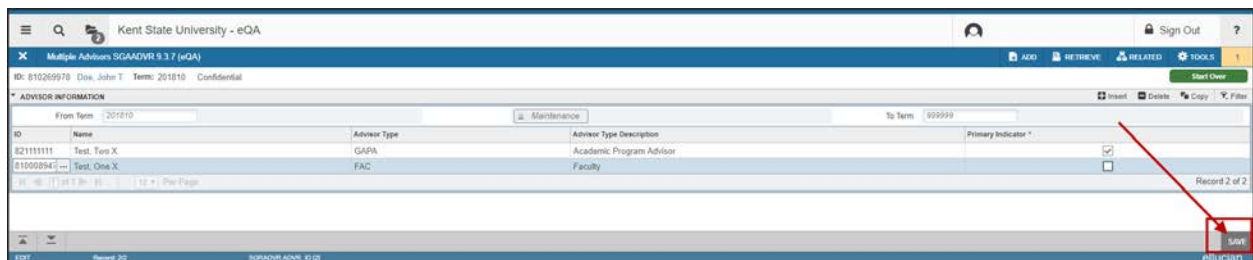


The screenshot shows the 'Advisor Information' block in the eQA system. The 'From Term' is set to 201810 and the 'To Term' is 202223. The 'Maintenance' button is visible. The table below shows one advisor:

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator
821111111	Test, Two X	GAPA	Academic Program Advisor	<input checked="" type="checkbox"/>

The 'Insert' button is highlighted with a red box.

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.



The screenshot shows the 'Advisor Information' block in the eQA system. The 'From Term' is 201810 and the 'To Term' is 202223. The 'Maintenance' button is visible. The table below shows two advisors:

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator
821111111	Test, Two X	GAPA	Academic Program Advisor	<input checked="" type="checkbox"/>
E1000947	Test, One X	FAC	Faculty	<input type="checkbox"/>

The 'Save' button is highlighted with a red box.

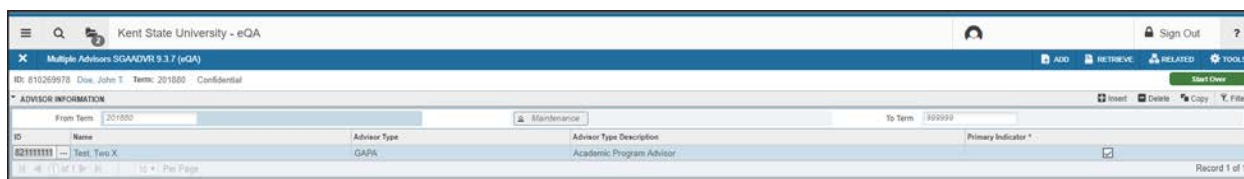
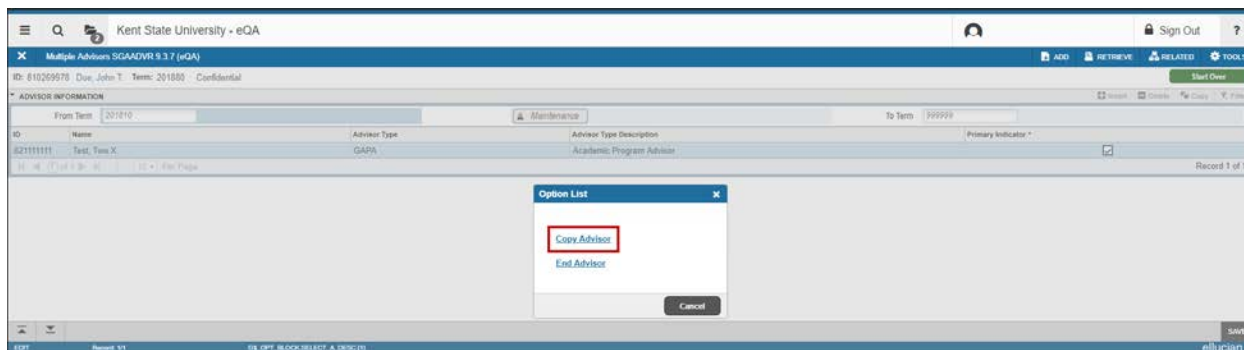
When effective term for additional advisor is for a future term:

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.



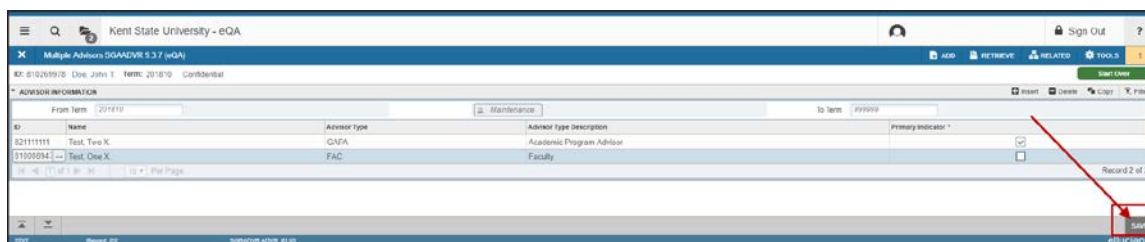
14. Arrow down or click the Insert to enter another advisor.

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.

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
821111111	Test, Tao X.	GAPA	Academic Program Advisor	<input type="checkbox"/>

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”.

Sign Out ?

ADD RETRIEVE RELATED TOOLS 1

✓ Saved successfully (2 rows saved)

Insert Delete Copy Filter

Primary Indicator *

Record 1 of 1

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.

Kent State University - eQA

Multiple Advisors SGAADVR 9.3.7 (uQA)

ID: 810269978 Due: John T. Term: 201880 Confidential

ADVISOR INFORMATION

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
810008947	Test_One_X	GAPA	Academic Program Advisor	

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

Kent State University - eQA

Multiple Advisors SGAADVR 9.3.7 (uQA)

ID: 810269978 Due: John T. Term: 201880 Confidential

ADVISOR INFORMATION

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
821111111	Test_Two_X	GAPA	Academic Program Advisor	

Option List

Copy Advisor

End Advisor

Cancel

Kent State University - eQA

Multiple Advisors SGAADVR 9.3.7 (uQA)

ID: 810269978 Due: John T. Term: 201880 Confidential

ADVISOR INFORMATION

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
821111111	Test_Two_X	GAPA	Academic Program Advisor	

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.

Kent State University - eQA

Multiple Advisors SGAADVR 9.3.7 (uQA)

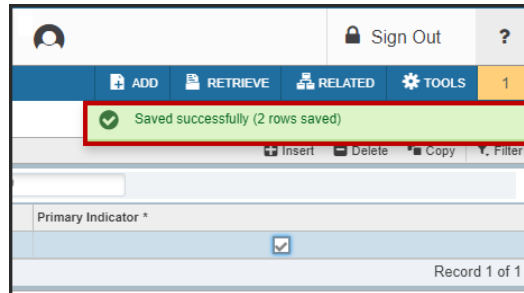
ID: 810269978 Due: John T. Term: 201880 Confidential

ADVISOR INFORMATION

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
810008947	Test_One_X	GAPA	Academic Program Advisor	

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”.

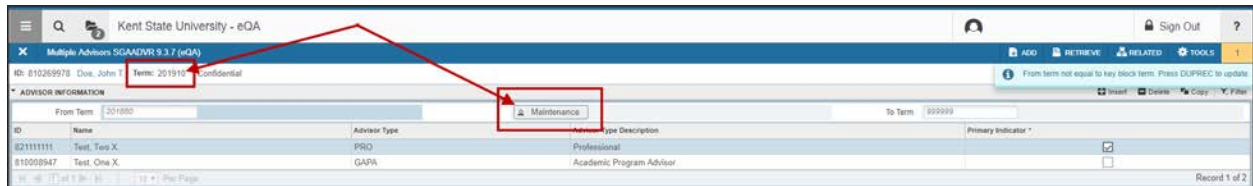


Deleting an Advisor When There is More than One

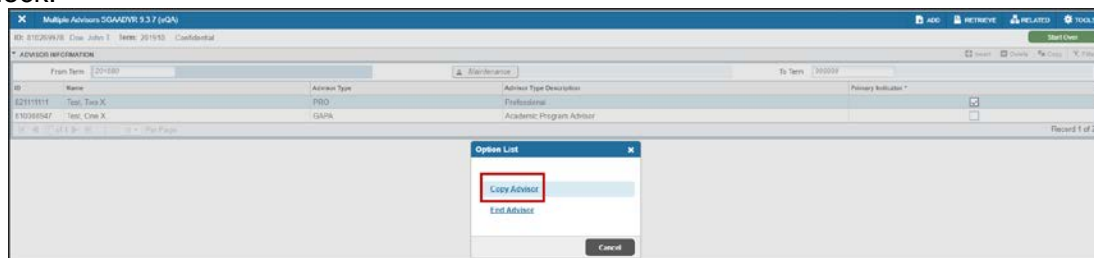
1. Tab to the TERM field and enter the effective term of the change.
2. If the change is for the **same term**, the original advisor was assigned, next block.
3. **Click on the ID number of the advisor that is going to be deleted**, click on the Delete button icon in the upper right corner of the page, 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.

Kent State University - eQA

Multiple Advisors SGADYR 9.3.7 (eQA)

ADD RETRIEVE RELATED TOOLS 1

ID: 810269978 Doc: John T Term: 201910 Confidential

Saved successfully (2 rows saved)

ADVISOR INFORMATION

From Term: 201910 Maintenance To Term: 999999

ID	Name	Advisor Type	Advisor Type Description	Primary Indicator *
81000947	Test, One X	GAPA	Academic Program Advisor	<input checked="" type="checkbox"/>

Record 1 of 1

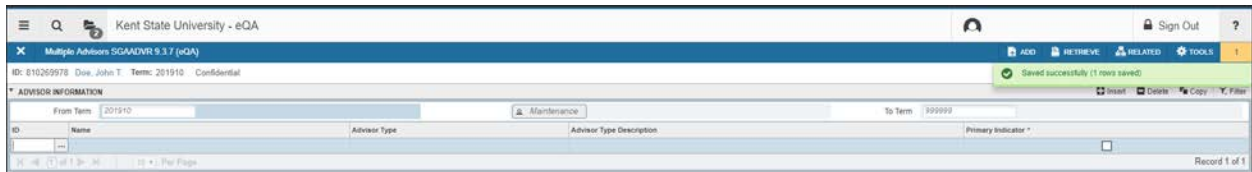
To Delete an Advisor When Only One Exists

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.



The screenshot shows the Kent State University eQA interface. The top navigation bar includes the Kent State University logo, a search icon, and a 'Sign Out' button. Below the navigation bar, there is a header for 'Multiple Advisors SGAADVR 9.3.7 (eQA)' with a close button. The main content area displays 'ADVISOR INFORMATION' for a specific record. The 'From Term' is set to '201900' and the 'To Term' is '999999'. A table below shows the advisor details: ID '81000000', Name 'Test, One X', Advisor Type 'GAPA', and Advisor Type Description 'Academic Program Advisor'. In the upper right corner of the form, there are several action buttons: 'ADD', 'RETRIEVE', 'RELATED', 'TOOLS', 'Start Over', 'Insert', 'Delete', 'Copy', and 'Filter'. The 'Delete' button is highlighted with a red box, and a red arrow points to it from the right side of the image.

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.



The screenshot shows the Kent State University eQA interface after a successful save. The top navigation bar is the same as in the previous screenshot. The header now shows 'Multiple Advisors SGAADVR 9.3.7 (eQA)' with a close button and a '1' indicator. A green success message 'Saved successfully (1 rows saved)' is displayed at the top. The 'ADVISOR INFORMATION' section shows the 'From Term' as '201910' and the 'To Term' as '999999'. The table below is empty. The 'Delete' button in the upper right corner is still visible.