

## Advisor Maintenance

Revised 1/7/2010

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.

### 1. Go to **SGAADVR**

The screenshot shows the Oracle Developer Forms Runtime window for the SGAADVR form. The window title is "Oracle Developer Forms Runtime - Web: Open > SGAADVR". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various navigation and editing icons. The form itself is titled "Multiple Advisors SGAADVR 7.3.1 (eTEST)". It features several input fields: "ID:" with a dropdown menu, "Term:" with a dropdown menu, "From Term:" with a text field, and "To Term:" with a text field. Below these is a "Maintenance" button with a plus icon. The main section is "Advisor Information", which contains a table with three columns: "ID", "Advisor Type", and "Primary Indicator". The table has 15 rows, all of which are currently empty. At the bottom of the form, there is a text field for "Name" with a prompt: "Name: Enter a name Last, First, Middle and press enter or tab. Use the wildcard \"%\" if needed." and a "Record: 1/1" indicator. The Windows taskbar at the bottom shows the Start button and several open applications, including Microsoft Outlook, Oracle Application S..., Oracle Developer F..., and a web browser.

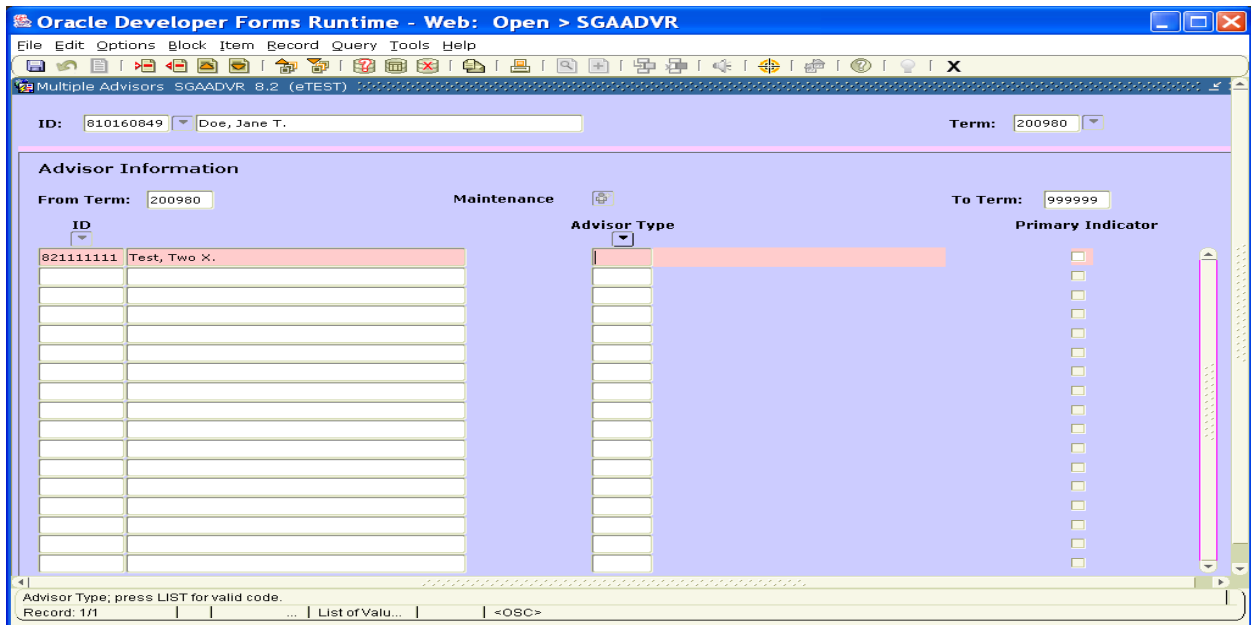
### 2. Enter the student's Banner ID number.

### 3. Your cursor will automatically move to the Term field. Enter the effective term (e.g. 200980) of the change.

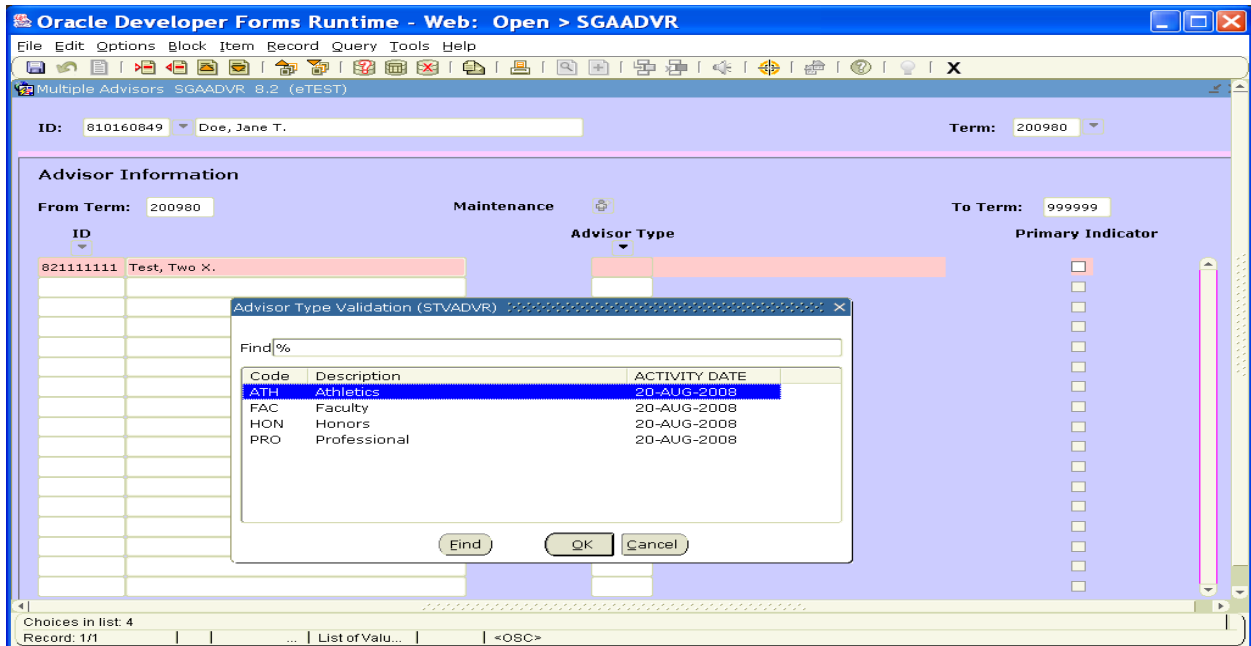
- This is either the term a new advisor is being added or the effective term of a change that is being made to the student's record.

### 4. Next block to the Advisor Information block.

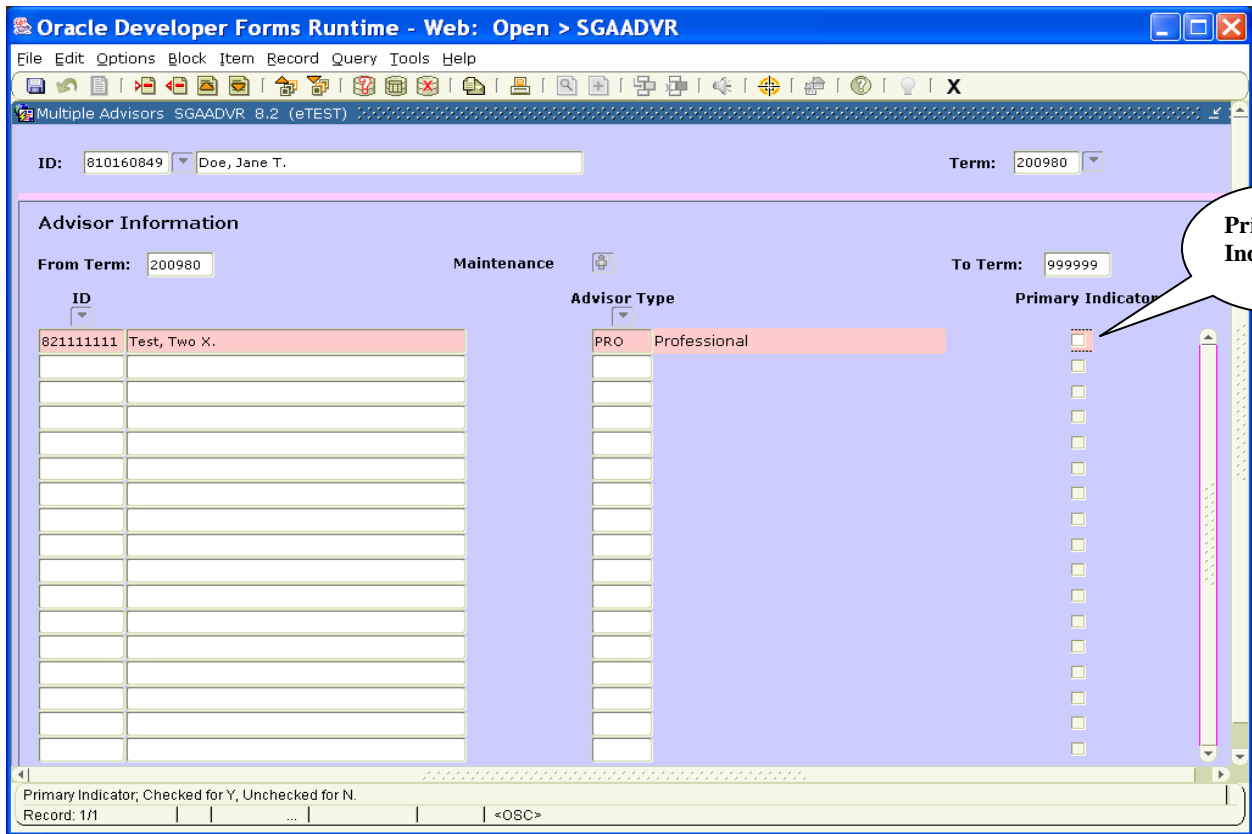
5. Enter the Banner ID of the advisor you are going to attach to the student. Once the Banner ID is entered the Advisor name will be brought into context automatically.



6. Your cursor will automatically move to the Advisor Type field.
7. For the available options of Advisor types, click on the drop down arrow (LOV button).
8. Choose the appropriate Advisor type and click ok.



- The primary indicator must be checked. If you attempt to save without the indicator being checked you will receive an error message.



- Click on the Save icon in the upper left-hand corner.

## Search for an advisor if you do not know their Banner ID –

The screenshot displays the Oracle Developer Forms Runtime web application. The window title is "Oracle Developer Forms Runtime - Web: Open > SGAADV". The browser address bar shows "Multiple Advisors SGAADV 7.3.1 (eTEST)". The main form area is titled "Advisor Information" and contains several fields and a table:

- ID:** A text input field.
- Term:** A dropdown menu.
- From Term:** A text input field.
- Maintenance:** A button with a plus sign icon.
- To Term:** A text input field.
- Table:** A table with three columns: "ID", "Advisor Type", and "Primary Indicator". The "ID" column has a dropdown arrow. The "Primary Indicator" column contains a vertical list of checkboxes.

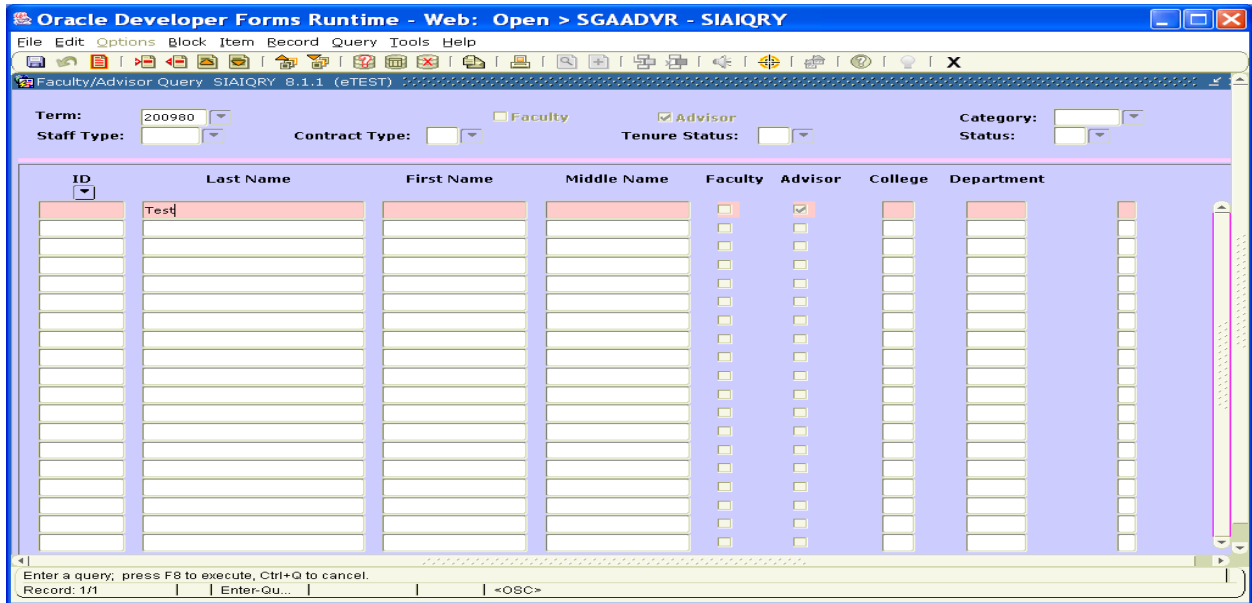
At the bottom of the form, there is a text input field with the prompt: "Name; Enter a name Last, First, Middle and press enter or tab. Use the wildcard \"%\" if needed." Below this is a "Record: 1/1" indicator and a "<OSC>" button. The Windows taskbar at the bottom shows the start button and several open applications, including Microsoft Outlook, Oracle Application S..., Oracle Developer F..., and a web browser.

1. Enter the student's Banner ID number.
2. Your cursor will automatically move to the Term field. Enter the effective term (e.g. 200980) 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. Next block to the Advisor Information block.


4. Click on the ID drop down arrow (LUV button) to search for an advisor.
5. This will bring you to SIAIQRV – Faculty/Advisor Query form.

The screenshot shows the Oracle Developer Forms Runtime interface for the SIAIQRV form. The top section contains search criteria: Term (200980), Staff Type, Contract Type, Faculty (unchecked), Advisor (checked), Tenure Status, Category, and Status. Below this is a table with columns: ID, Last Name, First Name, Middle Name, Faculty, Advisor, College, and Department. The 'Advisor' column contains a checked checkbox for each row. A callout bubble points to the 'Advisor' checkbox with the text 'Leave checked'. The bottom status bar shows 'Record: 1/1' and a '<OSC>' button.

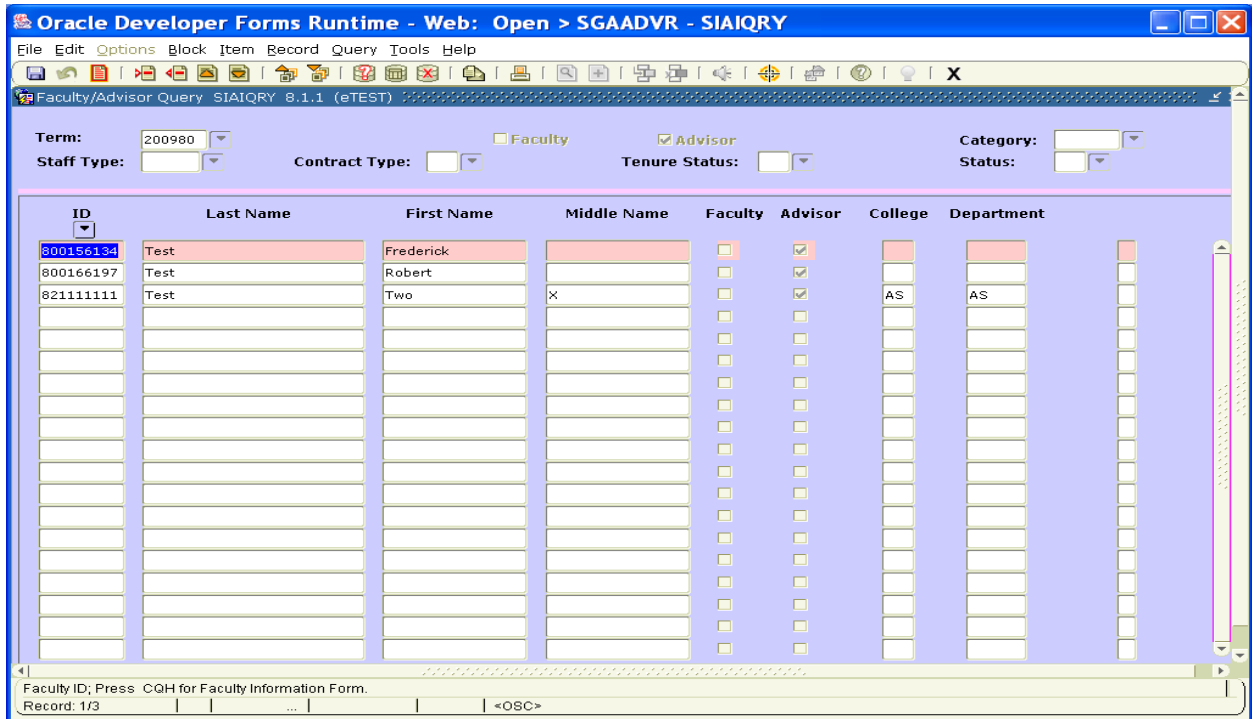
6. In the key block leave the Advisor checkmark there.
7. Next block
8. Your cursor will be in the ID field.
9. Tab to the Last Name field.
10. Enter the last name of the advisor you are looking for.



11. To narrow the search, tab to the First Name field and enter the first name of the advisor.

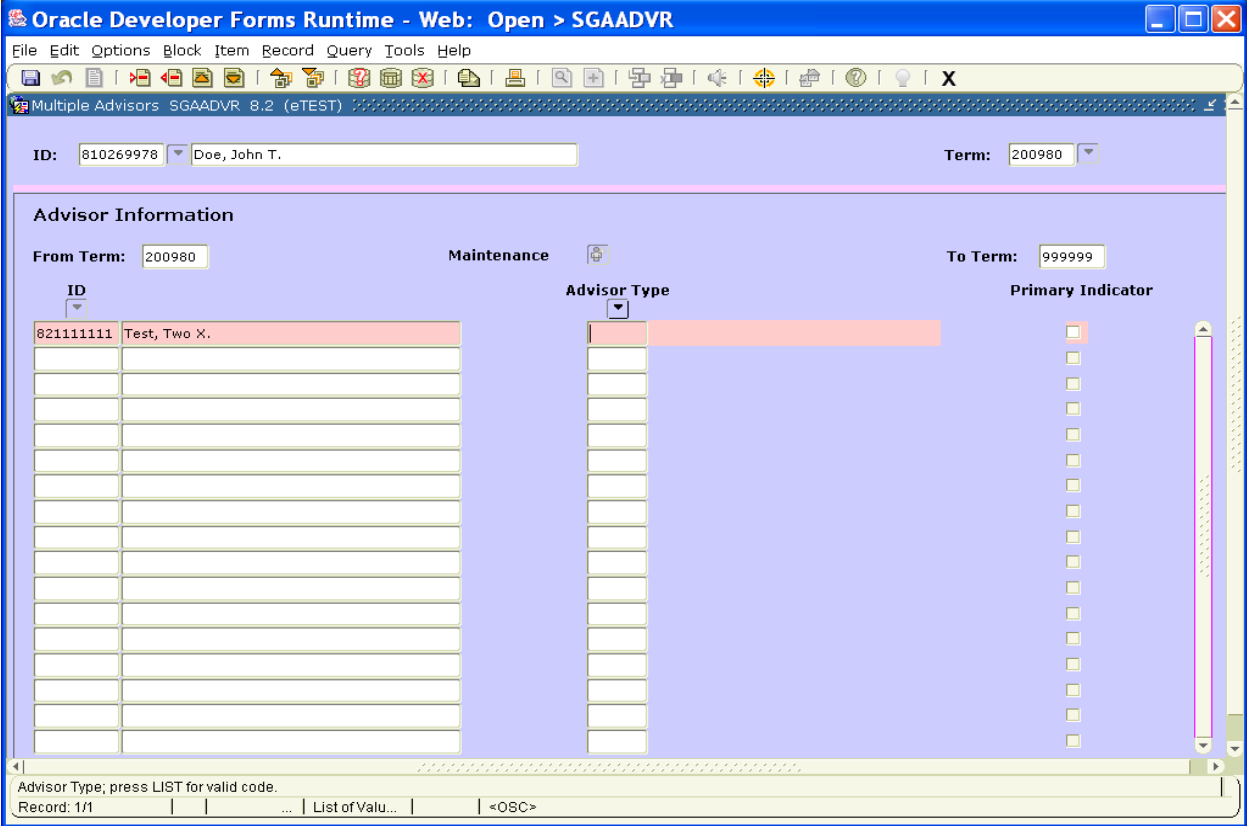
12. To execute the query, press keystroke F8 or click on the Enter Query icon  at the top of the page.

13. 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.



14. Determine which is the advisor that is to be attached to the student and click on the Select icon (the RED letter icon in the upper left hand of the form). This will back walk the advisor to the SGAADVR form.

**⊗ 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.**



15. Complete the form by adding the advisor type and the primary indicator and save.

## To add an additional advisor –

1. Tab to the Term field and enter the effective term of the addition of the second advisor.
2. Next block.
3. Arrow down to the first available advisor field.
4. Enter the Banner ID of the advisor you are going to attach to the student in the ID field or search for the advisor by clicking on the LOV button. Once the Banner ID is entered the Advisor name will be brought into context automatically.
5. Enter the Advisor Type.
6. Only one advisor can be the primary. If needed, change the primary indicator to the new primary advisor.
7. Save after all transactions are complete.

Oracle Developer Forms Runtime - Web: Open > SGAADVR

File Edit Options Block Item Record Query Tools Help

Multiple Advisors SGAADVR 7.3.1 (ePROD)

ID: 810160849 Doe, Jane T. Term: 201010

From Term: 201010 Maintenance To Term: 999999

ID	Advisor Type	Primary Indicator
810008947 Test, One X.	PRO Professional	<input checked="" type="checkbox"/>
800312390 Johnson, Betty A.	FAC Faculty	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
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FRM-40400: Transaction complete: 1 records applied and saved.


Record: 2/2 | | | | <OSC>

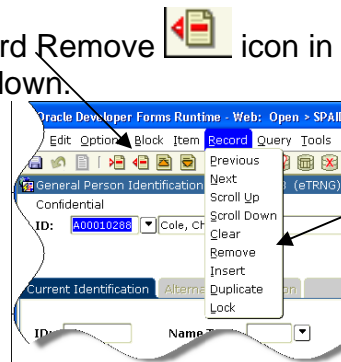


## To change an advisor – same term

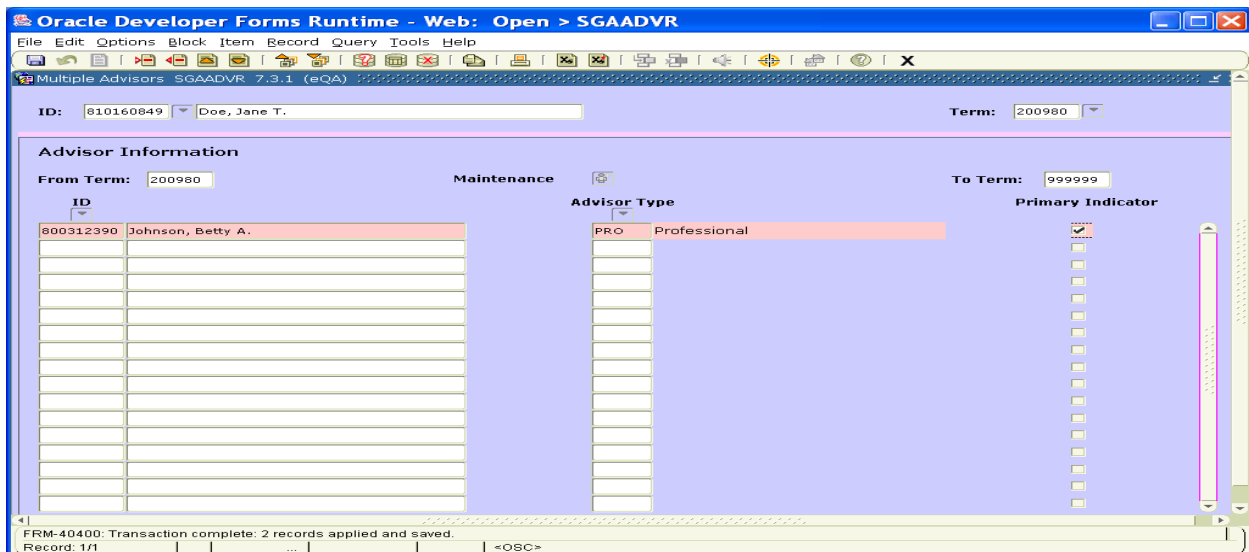
☒ This example is changing an advisor in the same term that the original advisor was assigned. Original advisor was assigned 200980.

1. Tab to the Term field and enter the effective term of the change (200980).
2. Next block.
3. Tab to the advisor that is already assigned to the student.

4. Click on the Record Remove  icon in the toolbar or click on Record Remove in the Record drop down.



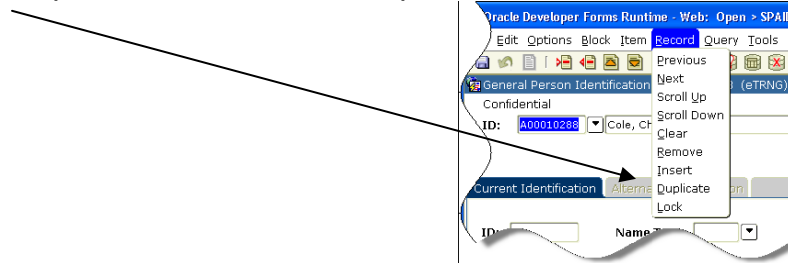
5. Enter the Banner ID of the advisor you are going to attach to the student in the ID field or search for the advisor by clicking on the LOV button. Once the Banner ID is entered the Advisor name will be brought into context automatically.
6. Enter the Advisor Type.
7. Add the Primary Indicator checkmark.
8. Save after all transactions are complete. You should receive a message that “2 records applied and saved”.

A screenshot of the Oracle Developer Forms Runtime application showing the 'Advisor Information' form. The form has a header with 'ID: 810160849' and 'Doe, Jane T.' and 'Term: 200980'. Below the header is a table with columns for 'ID', 'Advisor Name', 'Advisor Type', and 'Primary Indicator'. The first row is highlighted in red and contains the values: '800312390', 'Johnson, Betty A.', 'PRO Professional', and a checked checkbox. The 'From Term' is set to '200980' and the 'To Term' is set to '999999'. At the bottom of the form, a status bar displays the message: 'FRM-40400: Transaction complete: 2 records applied and saved. Record: 1/1'.


## To change an advisor – future term

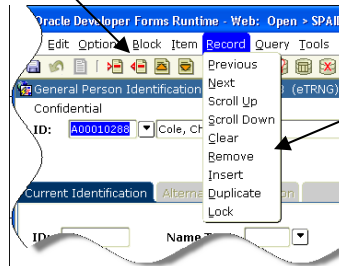
☒ This example is changing an advisor for a future term (201010). Original advisor was assigned 200980.

1. Tab to the Term field and enter the effective term of the change (201010).
2. Next block.
3. Click on the Record Duplicate in the Record drop down.



4. Your cursor will be in the ID field.

5. Click on the Record Remove  icon in the toolbar or click on Record Remove in the drop down.

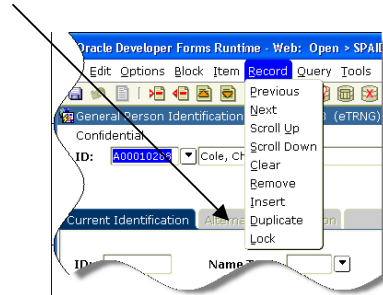


6. Enter the Banner ID of the advisor you are going to attach to the student in the ID field or search for the advisor by clicking on the LOV button. Once the Banner ID is entered the Advisor name will be brought into context automatically.
7. Enter the Advisor Type.
8. Add the Primary Indicator checkmark.
9. Save after all transactions are complete. You should receive the message that 2 records applied and saved.




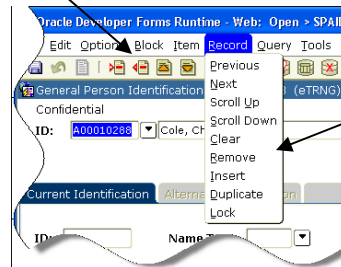
## To delete an advisor when there is more than one –

1. Tab to the Term field and enter the effective term of the delete.
2. If the change is for the **same term** the original advisor was assigned, next block.
3. If the change is for a **future term**, click on the Record Duplicate in the Record drop down.



4. Your cursor will be in the ID field or arrow down to the advisor that is to be deleted.

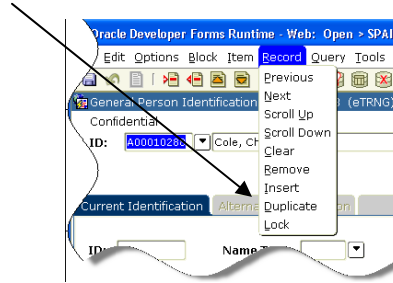
5. Click on the Record Remove  icon in the toolbar or click on Record Remove in the drop down.




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 icon to save your transactions.

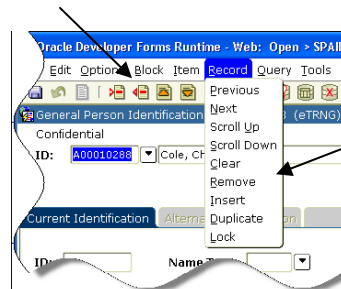
## To delete an advisor when there is only one –

1. Tab to the Term field and enter the effective term of the delete.
2. If the change is for the **same term** the original advisor was assigned, next block.
3. If the change is for a **future term**, click on the Record Duplicate in the Record drop down.



4. Your cursor will be in the ID field or arrow down to the advisor that is to be deleted.

5. Click on the Record Remove  icon in the toolbar or click on Record Remove in the drop down.



6. Click on the Save icon. You should receive the message that "2 records applied and saved."