

Assigning Academic Advisors

OBJECTIVE: This document explains the steps involved in assigning an academic department advisor to a student in PeopleSoft.

CONTENTS:

[LESSON 1: ASSIGNING ACADEMIC ADVISORS PG. 2](#)

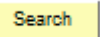
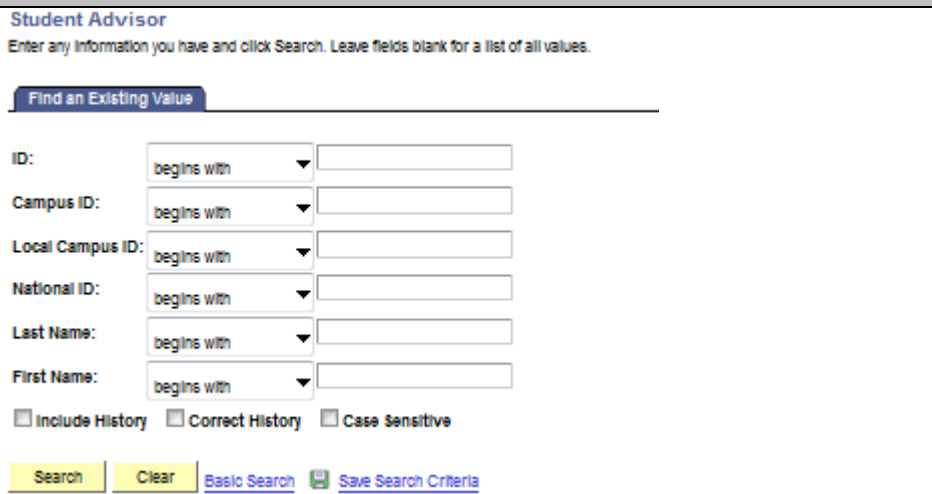
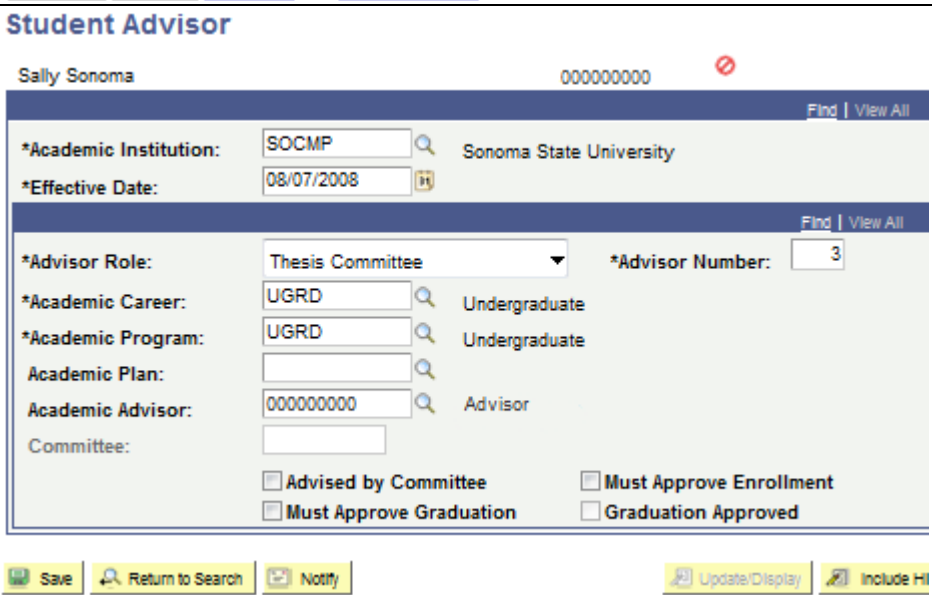
NEED ADDITIONAL INFORMATION?


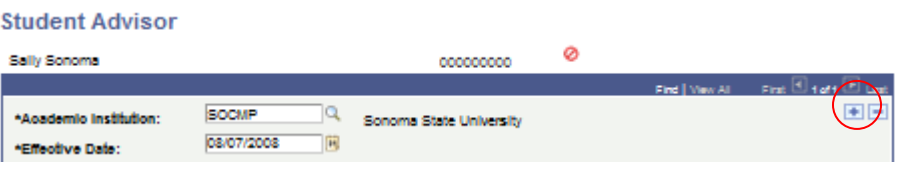
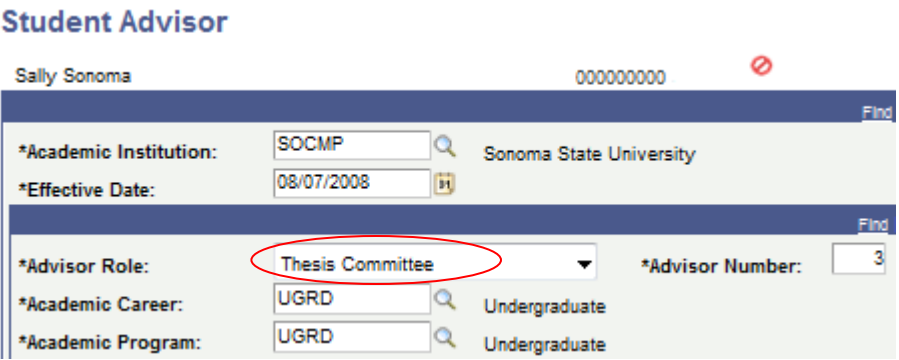




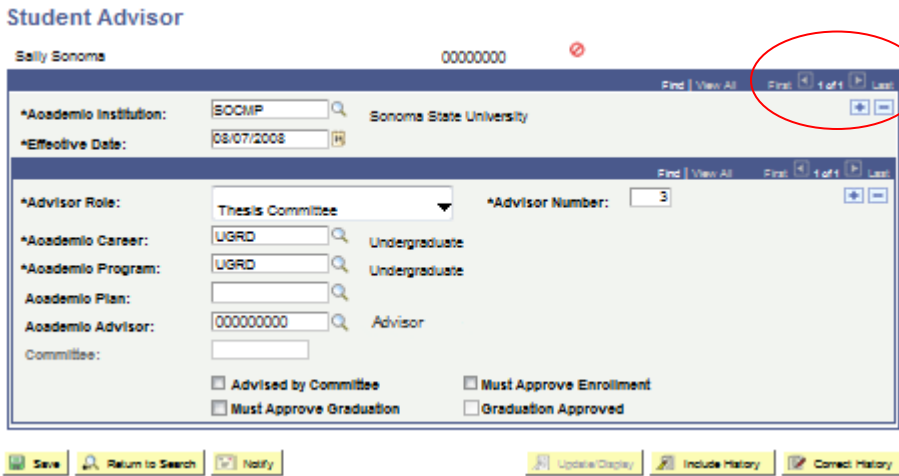


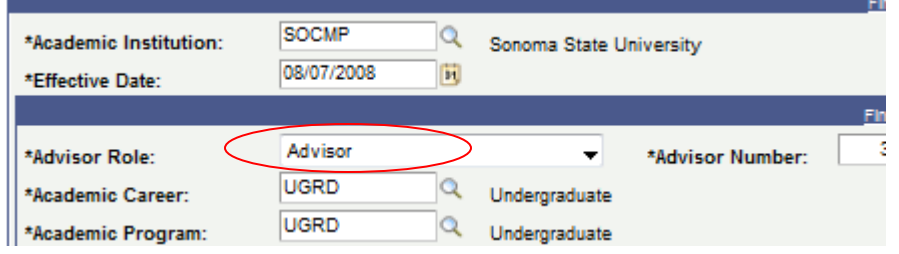
For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/cms/contact.shtml> to locate the **STUDENT RECORDS FUNCTIONAL LEAD** under Student Administration.

Lesson 1


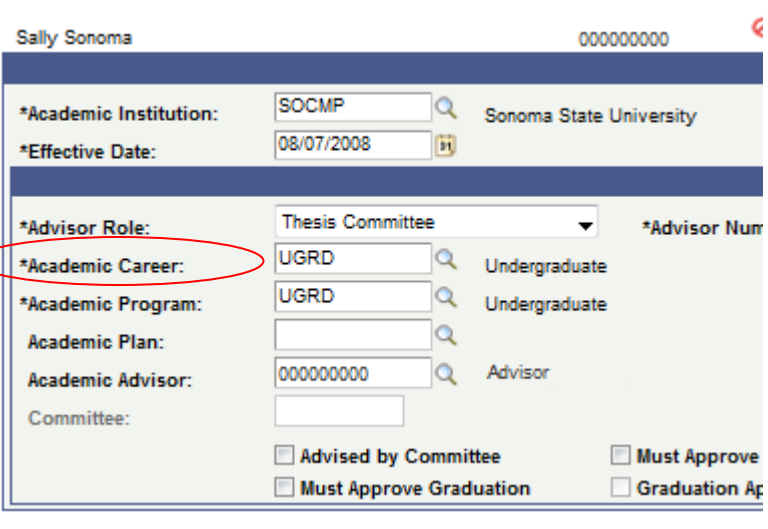

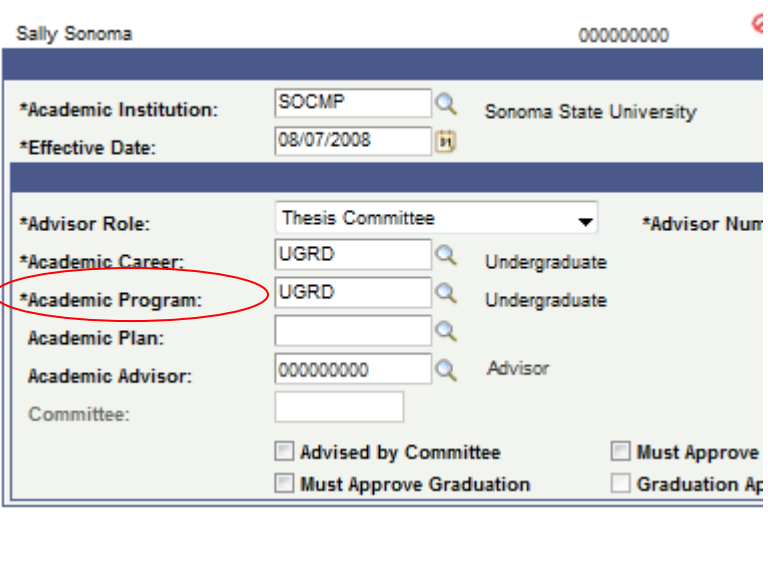

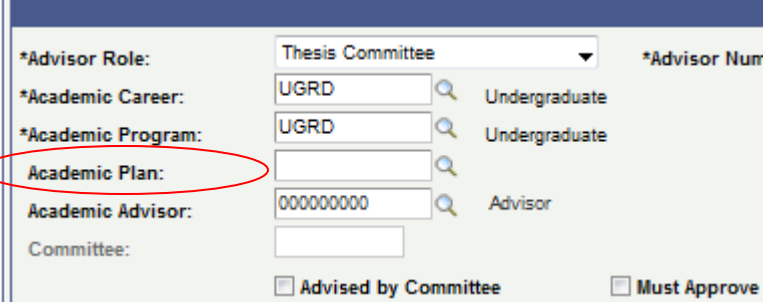
Navigation: Records and Enrollment > Student Background Information > Student Advisor

INTRODUCTION: The following table will outline the steps necessary to add an academic advisor to a student record.


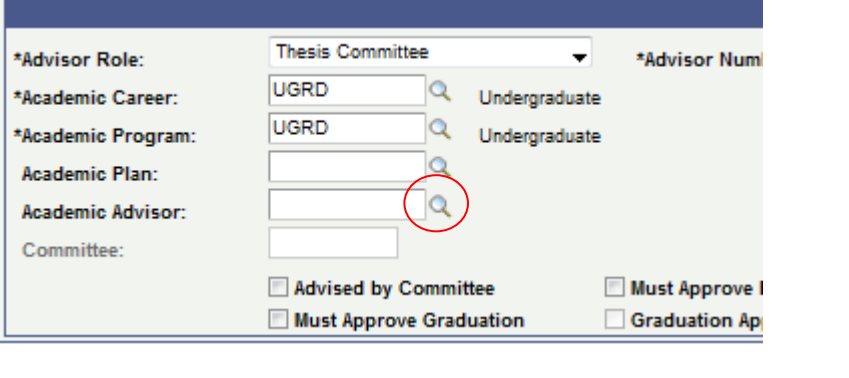
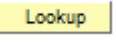








Step	Action	Screenshot						
1	<p>Navigate to the Student Advisor Page.</p> <p>Navigation: Records and Enrollment> Student Background Information> Student Advisor</p> <p>Enter student information.</p> <p>Click .</p>							
2	<table border="1" data-bbox="240 1262 553 1810"> <thead> <tr> <th data-bbox="240 1262 407 1297">If</th> <th data-bbox="407 1262 553 1297">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 1297 407 1556">The Student Advisor page is populated with data...</td> <td data-bbox="407 1297 553 1556">Proceed to Step 3.</td> </tr> <tr> <td data-bbox="240 1556 407 1810">The Student Advisor page is not populated with data...</td> <td data-bbox="407 1556 553 1810">Proceed to Step 5.</td> </tr> </tbody> </table>	If	Then	The Student Advisor page is populated with data...	Proceed to Step 3.	The Student Advisor page is not populated with data...	Proceed to Step 5.	
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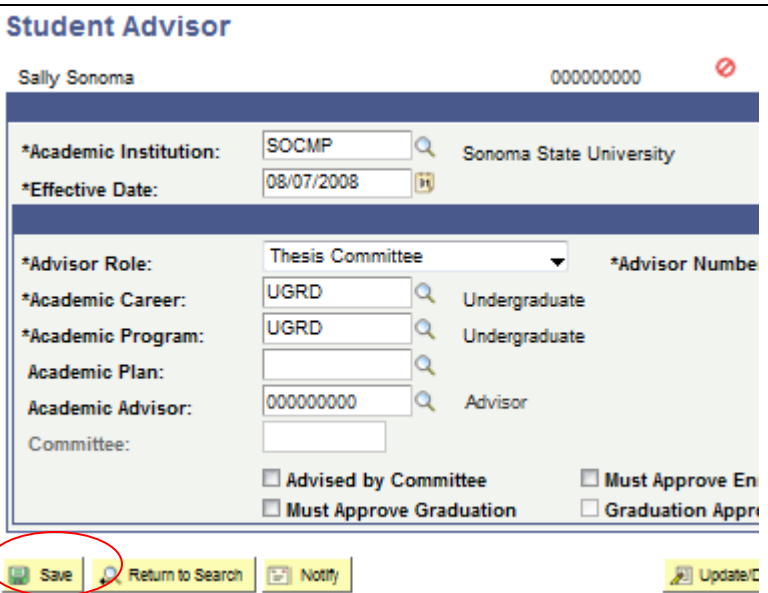




<p>3</p> <p>Click on the plus sign  to the right of Academic Institution.</p> <p>NOTE: DO NOT delete/change any existing information in the record.</p>								
<p>4</p> <table border="1" data-bbox="240 619 592 919"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The existing advisor role is "Thesis Committee"...</td> <td>Go to step 5.</td> </tr> <tr> <td>The existing advisor role is "Advisor"...</td> <td>Go to step 6.</td> </tr> </tbody> </table>	If	Then	The existing advisor role is "Thesis Committee"...	Go to step 5.	The existing advisor role is "Advisor"...	Go to step 6.		
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If	Then							
There is more than one row...	Click on the arrow to go to the next row. 							
There is only one row...	Click on the plus to add a new row. 							
<p>6</p> <p>Leave the Advisor Role as the default Advisor.</p> <p>NOTE: Never change or delete a "Thesis Committee" row.</p>								

STUDENT RECORDS

<p>7</p> <p>Enter the Student's Academic Career.</p> <table border="1" data-bbox="240 394 734 621"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The student is an Undergraduate...</td> <td>Enter UGRD</td> </tr> <tr> <td>The student is a Post-baccalaureate...</td> <td>Enter PBAC</td> </tr> </tbody> </table> <p>Note: You can click on the magnifying glass icon to obtain a list of careers that student is active in. Select the career corresponding to the student's major. </p>	If	Then	The student is an Undergraduate...	Enter UGRD	The student is a Post-baccalaureate...	Enter PBAC	
If	Then						
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The student is a Post-baccalaureate...	Enter PBAC						
<p>8</p> <p>Enter the Student's Academic Program.</p> <table border="1" data-bbox="240 976 734 1203"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The student is an Undergraduate...</td> <td>Enter UGRD</td> </tr> <tr> <td>The student is a Post-baccalaureate...</td> <td>Enter PBAC</td> </tr> </tbody> </table> <p>Note: You can click on the magnifying glass icon to obtain a list of programs that student is active in. Select the program corresponding to the student's major. </p>	If	Then	The student is an Undergraduate...	Enter UGRD	The student is a Post-baccalaureate...	Enter PBAC	
If	Then						
The student is an Undergraduate...	Enter UGRD						
The student is a Post-baccalaureate...	Enter PBAC						
<p>9</p> <p>Enter the Student's Academic Plan (major).</p> <p>Note: You can click on the magnifying glass icon to view list of majors currently attached to the student. Select the major for which the academic advisor is being added. </p>							

STUDENT RECORDS

<p>10</p>	<p>Click on the magnifying glass next to Academic Advisor. </p>																	
<p>11</p>	<p>Enter the last name of the advisor and click  .</p>	<p>Advisor Search Page</p> <p>Look Up Academic Advisor</p> <p>Academic Institution: begins with <input type="text" value="SOCMP"/> </p> <p>EmpIID: begins with <input type="text"/></p> <p>Academic Organization: begins with <input type="text"/></p> <p>National ID: begins with <input type="text"/></p> <p>Campus ID: begins with <input type="text"/></p> <p>Last Name: begins with <input type="text" value="Advisor"/></p> <p>First Name: begins with <input type="text"/></p> <p>  </p>																
<p>12</p>	<p>A list of advisors with the requested last name will appear. Click Select in the field of the appropriate selection. If the desired advisor is not listed, they may not be listed in the system as an advisor. Contact the CMS HelpDesk for further instruction at CMS@sonoma.edu.</p>	<p>Academic Institution: begins with <input type="text" value="SOCMP"/> </p> <p>EmpIID: begins with <input type="text"/></p> <p>Academic Organization: begins with <input type="text"/></p> <p>National ID: begins with <input type="text"/></p> <p>Campus ID: begins with <input type="text"/></p> <p>Last Name: begins with <input type="text" value="Advisor"/></p> <p>First Name: begins with <input type="text"/></p> <p>  </p> <table border="1" data-bbox="722 1438 1453 1585"> <thead> <tr> <th></th> <th>Select</th> <th>EmpIID</th> <th>Academic Institution</th> <th>Academic Organization</th> <th>National ID Country</th> <th>NID Short Description</th> <th>Natio</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Select</td> <td>00000000</td> <td>SOCMP</td> <td>110</td> <td>USA</td> <td>SSN</td> <td>*****</td> </tr> </tbody> </table>		Select	EmpIID	Academic Institution	Academic Organization	National ID Country	NID Short Description	Natio	1	Select	00000000	SOCMP	110	USA	SSN	*****
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1	Select	00000000	SOCMP	110	USA	SSN	*****											

<p>13</p>	<p>You have completed data entry with entry of the advisor; click <i>Save</i> at the bottom of the screen. </p>	 <p>Student Advisor</p> <p>Sally Sonoma 000000000</p> <p>*Academic Institution: SOCMP Sonoma State University</p> <p>*Effective Date: 08/07/2008</p> <p>*Advisor Role: Thesis Committee *Advisor Number</p> <p>*Academic Career: UGRD Undergraduate</p> <p>*Academic Program: UGRD Undergraduate</p> <p>Academic Plan:</p> <p>Academic Advisor: 000000000 Advisor</p> <p>Committee:</p> <p><input type="checkbox"/> Advised by Committee <input type="checkbox"/> Must Approve En</p> <p><input type="checkbox"/> Must Approve Graduation <input type="checkbox"/> Graduation Appr</p> <p> Save  Return to Search  Notify  Update/C</p>
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