

Assigning Academic Advisors

OBJECTIVE:

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

CONTENTS:

LESSON 1: ADDING ACADEMIC ADVISORS TO STUDENT RECORDS .[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

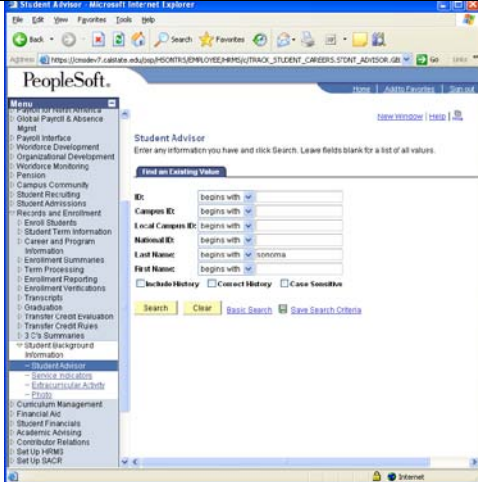
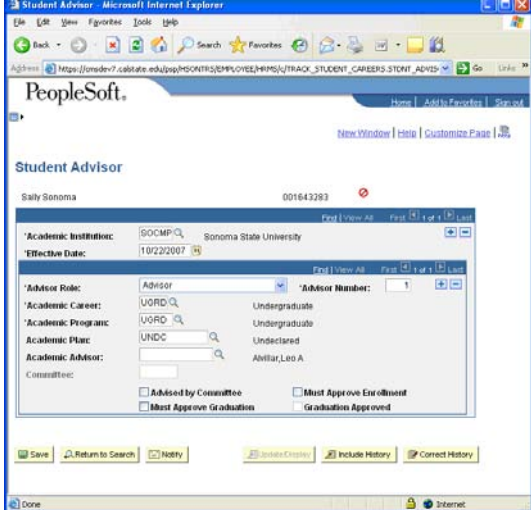
under Student Administration.

STUDENT RECORDS



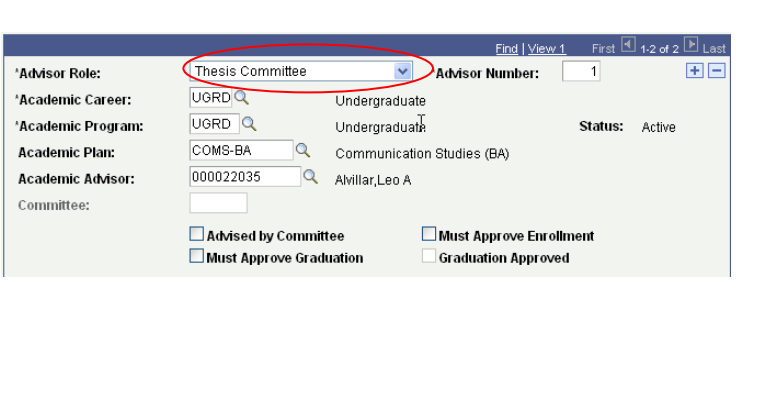

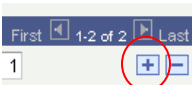

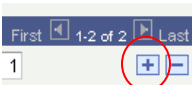
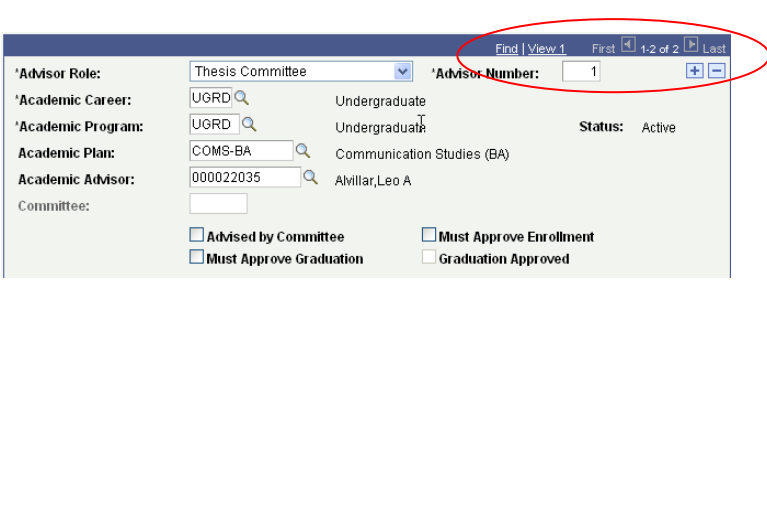

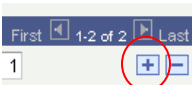
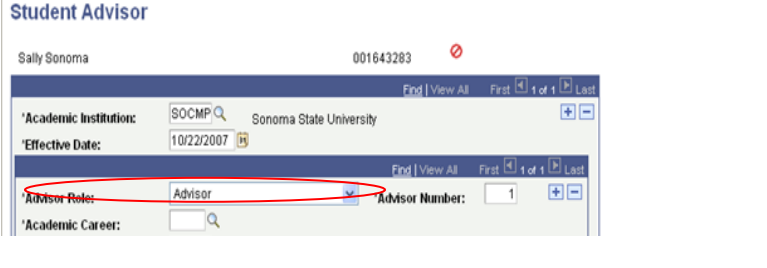
Lesson 1:

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.


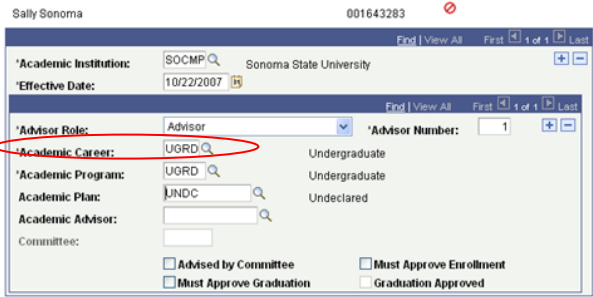



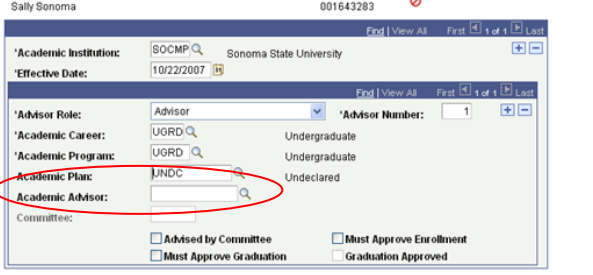
Step	Action	Screenshot						
1	Navigate to the Student Advisor Page							
2	<table border="1" data-bbox="240 1255 734 1587"> <thead> <tr> <th data-bbox="240 1255 492 1295">If</th> <th data-bbox="492 1255 734 1295">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 1295 492 1440">The Student Advisor page is populated with data...</td> <td data-bbox="492 1295 734 1440">Proceed to Step 3.</td> </tr> <tr> <td data-bbox="240 1440 492 1587">The Student Advisor page is not populated with data...</td> <td data-bbox="492 1440 734 1587">Proceed to Step 4.</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 4.	<p style="text-align: center;">Populated</p> 
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 4.							

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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"> <thead> <tr> <th data-bbox="240 548 488 590">If</th> <th data-bbox="493 548 732 590">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 596 488 737">The existing advisor role is "Thesis Committee"...</td> <td data-bbox="493 596 732 737">Go to step 5.</td> </tr> <tr> <td data-bbox="240 743 488 848">The existing advisor role is "Advisor"...</td> <td data-bbox="493 743 732 848">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.	
If	Then							
The existing advisor role is "Thesis Committee"...	Go to step 5.							
The existing advisor role is "Advisor"...	Go to step 6.							
<p>5</p>	<table border="1"> <thead> <tr> <th data-bbox="240 955 488 997">If</th> <th data-bbox="493 955 732 997">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="240 1003 488 1178">There is more than one row...</td> <td data-bbox="493 1003 732 1178"> <p>Click on the arrow to go to the next row.</p>  </td> </tr> <tr> <td data-bbox="240 1184 488 1373">There is only one row...</td> <td data-bbox="493 1184 732 1373"> <p>Click on the plus to add a new row.</p>  </td> </tr> </tbody> </table>	If	Then	There is more than one row...	<p>Click on the arrow to go to the next row.</p> 	There is only one row...	<p>Click on the plus to add a new row.</p> 	
If	Then							
There is more than one row...	<p>Click on the arrow to go to the next row.</p> 							
There is only one row...	<p>Click on the plus to add a new row.</p> 							
<p>6</p>	<p>Leave the Advisor Role as the default Advisor.</p> <p>NOTE: Never change or delete a "Thesis Committee" row.</p>							


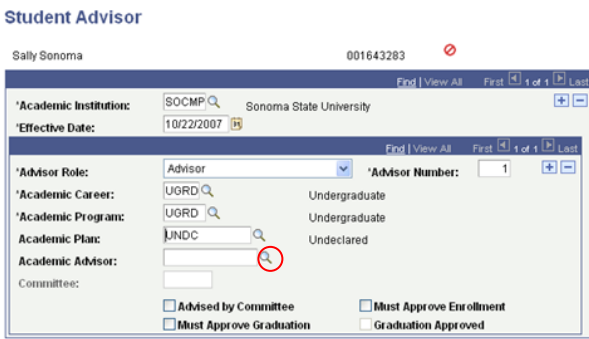
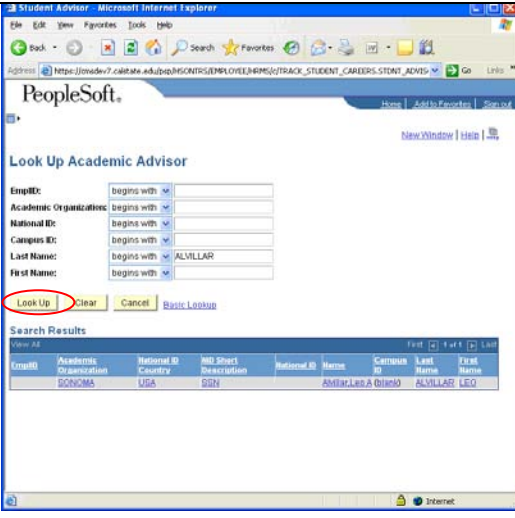
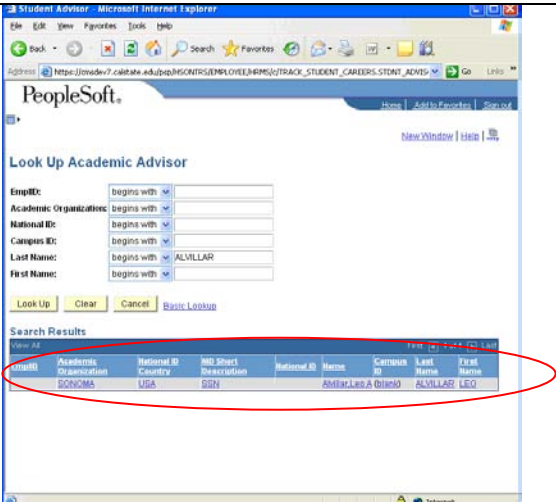
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STUDENT RECORDS

<p>7</p> <p>Enter the Student's Academic Career.</p> <table border="1" data-bbox="240 394 735 621"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The student is an Undergraduate...</td> <td>Enter UGRAD</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 UGRAD	The student is a Post-baccalaureate...	Enter PBAC	<p>Student Advisor</p> 
If	Then						
The student is an Undergraduate...	Enter UGRAD						
The student is a Post-baccalaureate...	Enter PBAC						
<p>8</p> <p>Enter the Student's Academic Program.</p> <table border="1" data-bbox="240 974 735 1201"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The student is an Undergraduate...</td> <td>Enter UGRAD</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 UGRAD	The student is a Post-baccalaureate...	Enter PBAC	<p>Student Advisor</p> 
If	Then						
The student is an Undergraduate...	Enter UGRAD						
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>	<p>Student Advisor</p> 						

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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 <i>Lookup</i>.</p>																			
<p>12</p>	<p>A list of advisors with the requested last name will appear. Click on the EmplID 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>	 <table border="1" data-bbox="771 1575 1258 1648"> <thead> <tr> <th>EmplID</th> <th>Academic Organization</th> <th>National ID</th> <th>Mid-Street</th> <th>National ID</th> <th>Home</th> <th>Carmin</th> <th>Last Name</th> <th>First Name</th> </tr> </thead> <tbody> <tr> <td>SONOMA</td> <td>USA</td> <td>SON</td> <td>AMERICANA BLDG</td> <td>ALVILLAR</td> <td>LEO</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	EmplID	Academic Organization	National ID	Mid-Street	National ID	Home	Carmin	Last Name	First Name	SONOMA	USA	SON	AMERICANA BLDG	ALVILLAR	LEO			
EmplID	Academic Organization	National ID	Mid-Street	National ID	Home	Carmin	Last Name	First Name												
SONOMA	USA	SON	AMERICANA BLDG	ALVILLAR	LEO															

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STUDENT RECORDS

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You have completed data entry with entry of the advisor, click **Save** at the bottom of the screen. 