Undergraduate Academic Advising: Advisor Assignments in Banner[1]

Academic Departments and Advising Centers are responsible for updating and "cleaning up" inaccurate academic advisor assignments in Banner. When a student is assigned a new or additional academic advisor, this assignment should be entered into Banner immediately. (New students should be assigned an advisor once they have attended a SOAR orientation session.) Advisor assignments in Banner should be reviewed for accuracy, and updated, at least once a semester within 2-3 weeks after census. For **Niner Advisor** to be effective, assignments must be accurate.

I.   How Students Find their Advisor

All undergraduate students can now view their assigned advisors in **Niner Advisor**. Niner Advisor automatically pulls up all advisor assignments put into Banner (including graduate student assignments if your department chooses to do so).

Students can also view the name of their assigned advisor(s) in Banner Self Service, which is accessed through 49er Express. Instructions are provided on the central Academic Advising website (www.advising.uncc.edu); click on **My Advisor** and then **Finding My Advisor**.

II.   Assigned Advisor(s) in Banner

Departments can access lists of all advisor assignments in Banner utilizing one of the following three methods:

Report Express: (found in Quick Links)
1. Go to Report Express: https://connect2.uncc.edu/dana-na/auth/url_64/welcome.cgi
2. Log in, using your UNC Charlotte username and password.
3. Select the Advising tab.
4. On left side, select the Report you desire:
     o   Advising Holds by college, dept, major
     o   Advising Holds by Advisor Id
     o   Advisor Listing by advisor
     o   Advisor Listing by level, college, department, major
     o   Enrolled by advisor id
     o   SOAR Session
     o   Students with no Advisor by level, college, dept., major
     o   Suspended or on Probation
5. Select Term, Level, College, Degree, Major, etc.
6. Select the Report output you desire (HTML or Excel)
7. Select Submit

You are encouraged to run the two highlighted lists at least once each semester to determine the accuracy of the advisor assignments in Banner and to make corrections as needed (see specific instructions below to avoid errors).

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[1] If your department/program assigns advisors for Graduate Students, these should also be updated in Banner, by following the same instructions.

Report Central: Report Central is a higher-level reporting system that includes a significant amount of confidential information. *Each department chair should have access rights for two people (chair, advising coordinator and/or administrative assistant). You are encouraged to work with these individuals. If your department needs access, the chair should contact the Director of Enterprise Information Management, 704-687-8237.*

1. Go to Report Central: https://reportcentral.uncc.edu
2. Log in, using your UNC Charlotte username and password.
3. Select the Advising tab.
4. On left side, select the Report you desire:
    - o Active Students on Suspension or Probation
    - o Admitted Engineering Freshmen/Transfers enrolled by major
    - o Admitted Freshmen with AP Course Credit
    - o Advising holds by college, dept, major
    - o Advising holds by Advisor Id
    - o Advisor listing by level, college, dept, major
    - o Advisor Listing w/email, work addr by level, college, major, dept
    - o Change in Field of Study by term, major
    - o College of Architecture MARCH Advising Sheet Download
    - o Course enrollment by level, college, major, minor, concentration
    - o English 1103 Candidates
    - o Enrolled by admit term, level, college, degree, major
    - o Enrolled by Advisor Id
    - o Enrolled Students with dual degrees (Physics and Engineering)
    - o Freshman Seminar Co-enrollment report by college, major
    - o Grade replacement requests by college, major, grade replacement status
    - o Graduate Students with Unsatisfactory Grades
    - o Graduate Students nearing Six-Year Course Limit
    - o Midterm Grades by level, college, major
    - o Readmitted Students enrolled by level, college
    - o SOAR Session
    - o Students with no Advisor by level, college, dept., major
    - o Suspended or on Probation
    - o Transcript Requests
    - o Undergraduates on Probation and Suspension by college, major

   Other reports are available through different tabs within Report Central.

   Banner Self-Service: Advisors may view their assigned advisees through Banner Self Service. Access the Faculty & Advisors menu, select the Advisor Menu, and then click the link for Faculty Advisees.

   Niner Advisor: Advisors may view their assigned advisees through Niner Advisor. This system pulls information from Banner. If advisees do not appear, or incorrect advisees appear on the advisor's view, then the assignments need to be updated.

III. **Advisor Type Codes (*New, more easily identifiable codes, as of Fall 2009*)**
    In order to designate the difference between advisors on the student's record, each advisor should have an *Advisor Type* assigned. New advisor types have been added to the system to provide clarity as to the type of advisor assigned. Below are the Advisor types that should be used:

- o Major Advisor (MAJR) - advisor within the student's major (also applies to pre-majors or additional majors)
- o Minor Advisor (MINR) - advisor within the student's minor (also applies to additional minors)
- o University Advising Center (UNIV) - advisor for undeclared or students transitioning between majors (University College)
- o Secondary Advisors (supplementary):
    - o Athletics (ATHL) - advisor for student-athletes
    - o BEST Program (BEST) - advisor for students enrolled in program
    - o Multicultural Academic Services (MAS) - advisor for students within underrepresented populations
    - o OASES (OASE) - advisor for adult and nontraditional students

Note: In the Advisor Listing Report you view the students are sorted by the last name of Advisor 1 (typically a MAJR advisor), including students that are assigned multiple advisors. This information can be imported into Excel and sorted in multiple ways.

IV. **Updating Advisor Assignments in Banner**
Advisor assignments may be updated through the SGAADVR form in *Internet Native Banner (INB)*. Specific instructions are below. In addition, training is available through the Office of the Registrar (http://training.uncc.edu/bannergettingstarted.htm) or from the Academic Advising Improvement Team (contact Chair, Ms. Henrietta Thomas, hlthomas@uncc.edu).

Note: If you have 100+ new freshmen or transfer students who need advisor assignments, you may send an Excel list to **enrolltech@uncc.edu** to have the advisor assignments uploaded into Banner. See steps in section V.

Caution: Care must be taken to 1) ensure that a major advisor is the "primary" advisor and, 2) avoid removing an advisor by accident. When a major/minor form is processed, then an advisor should be assigned by the new department. If it is a new major, then the department can delete the UNIV (University College) advisor. Do not remove any other major or minor advisors unless you verify first with that department. Do not remove any secondary advisors. When checking accuracy of advisor lists in Banner, departments should remove their own advisor names if they are no longer appropriate. College Advising Centers will also monitor advisor lists and send reports to departments when errors are observed.

Below is the recommended process for updating and maintaining advisor assignments in Banner:
1. Once a month (or no less than once a semester) the department runs Advisor Listing reports (advisor listing; students with no advisor) from Report Express or Report Central, to ensure accuracy of the advisor assignments.
2. When the department chair signs the "Change of Major/Minor" form, an advisor assignment should be made immediately and placed into Banner (see steps below). The advisor assignment from the student's former department should be removed. The central Academic Advising website instructs students to see the department if no advisor is listed.

3. If a student's advisor changes within the department, the advisor assignment in Banner needs to be updated immediately (see steps below under: Updating an Advisor Assignment).
4. For students that have additional majors or minors, advisor assignments should be entered into Banner, regardless if the student already has advisors assigned.
5. Some department chairs delegate the responsibility of updating advisor assignments to an administrative assistant or advisor.

Accessing the Multiple Advisors Form (SGAADVR)
Note: to find an appropriate icon, place your cursor over the icon bar to locate its name.
1. Begin with Internet Native Banner (INB) at http://banner.uncc.edu.
2. Select BANPROD from the INB section: Click Run.
3. Log in by using your UNC Charlotte username and password; select Connect.
4. At "Go to" type in SGAADVR and hit enter.
5. In the ID field, enter the UNC Charlotte ID of the student.
   If you do not have the ID of the student, click the Search icon (downward arrow next to ID field). Type the last name and first name in appropriate columns. Press F8 and it will show the ID number. Press Select icon and it will return you to the Multiple Advisors Form.

6. In the Term field (upper right corner), enter the current term code. (Fall = YYYY80; Spring = YYYY10; Summer I = YYYY50; Summer II = YYYY70).
7. Perform a Next Block by clicking the Next Block icon (or Ctrl Page Down).
8. The assigned advisor's name, ID number, and advisor type will be displayed. If there is no advisor assignment, there will be no information displayed.
9. To view a different student, click the Rollback icon (or Shift-F7) and repeat steps 5-8.
10. To return to the General Menu, click the Exit icon (or Ctrl-Q).

Updating an Advisor Assignment (SGAADVR)
Note: to find an appropriate icon, place your cursor over the icon bar to locate its name.
1. In the ID field, enter the UNC Charlotte ID of the student.
   If you do not have the ID of the student, click the Search icon (downward arrow next to ID field). Type the last name and first name in appropriate columns. Press F8 and it will show the ID number. Press Select and it will return you to the Multiple Advisors Form.
2. In the Term field (upper right corner), enter the current term code. (Fall = YYYY80; Spring = YYYY10; Summer I = YYYY50; Summer II = YYYY70).
3. Perform a Next Block by clicking the Next Block icon (or Ctrl Page Down).
4. If the **Term** field in the upper right corner matches the **From Term** field:
   - Update the advisor assignment.
5. If the **Term** field in the upper right corner does NOT match the **From Term** field:
   - Click the Maintenance icon, select **Copy Advisor** and update the advisor assignment.
6. In the **Advisor Type** field, enter the correct advisor type for the advisor assignment

7. Click the **Save** icon (or **F10**).

V.   Advisor Assignment Batch Upload in Banner (New Freshmen/Transfers Only)
If you have a list of 100+ new freshmen or transfer students who need advisor assignments or need to replace a previous advisor's assignments to a new advisor, the list can be put into an Excel file and sent to **enrolltech@uncc.edu** for upload into Banner.

Guidelines if you need to update new freshmen or transfer students
1. Create a three-column Excel file
2. Column A is headed INPUT_STUD_ID; Student ID number is listed in column A
3. Column B is headed INPUT_ADVR_ID; Advisor ID number is listed in column B
4. Column C is headed INPUT_ADVR_TYPE; Advisor Type is listed in column C (ex. MAJR, MINR, etc.)
5. Name the file "Advisor Assignments"
6. Save the file as CSV instead of XLS
7. Email CSV file to enrolltech@uncc.edu

	A	B	C
1	INPUT_STUD_ID	INPUT_ADVR_ID	INPUT_ADVR_TYPE
2	800******	800******	MAJR
3	800******	800******	MINR

Guidelines if you need to replace a previous advisor's assignments to a new advisor
1. Create a four-column Excel file
2. Column A is headed INPUT_STUD_ID; Student ID number is listed in column A
3. Column B is headed INPUT_ADVR_ID; New Advisor ID number is listed in column B
4. Column C is headed INPUT_ADVR_TYPE; Advisor Type is listed in column C (ex. MAJR, MINR, etc.)
5. Column D is headed INPUT_NEWADVR_ID; The Advisor ID being replaced in column D
6. Name the file "Advisor Assignments"
7. Save the file as CSV instead of XLS
8. Email CSV file to enrolltech@uncc.edu

	A	B	C	D
1	INPUT_STUD_ID	INPUT_ADVR_ID	INPUT_ADVR_TYPE	INPUT_NEWADVR_ID
2	800******	800******	MAJR	800******
3	800******	800******	MINR	800******

Thank you for taking time to help strengthen the advising process by ensuring accuracy in students' records.