ADD/CHANGE ADVISOR OR ADVISING COMMITTEE

1. Navigate to: Records and Enrollment > Student Background Information > Student Advisor
2. Enter the Student’s EmplId or Last Name and First Name.
3. Select the Include History checkbox.
4. Click Search.
5. If the student does NOT have an advisor or advising committee assigned, proceed to step #7.
6. If the student DOES have an advisor or advising committee assigned:
   a. Click the Add a Row button in the outer frame
   b. A new effective dated row is added with the current date as the Effective Date. Any rows for previously assigned Advisor(s) and Advising Committee(s) are copied to the new effective date.
   c. Click the Add a Row button in the inner frame to add a New Advisor/Advising Committee.
   d. A new, blank row is added.
7. Enter data in the new, blank row:
   a. If the Advisor change is not effective until a future term, enter the date of the first day of the effective term.
   b. Either enter data or click the lookup button for each of the following: Academic Career, Academic Program, and Academic Plan.
   c. Academic Advisor: Enter the advisor’s number or use the lookup icon to search for the advisor.
   d. If advised by a committee: leave the Academic Advisor field blank and select the Advised by Committee checkbox. Then, use the lookup icon to locate the Advising Committee.
8. Optional: If there are any additional changes, such as a second Advisor or Advising Committee, click the Add a Row button in the inner frame to add another advisor record for the effective date.

9. Click the View All link to view all the Advisors assigned for the effective date.
10. Review the advisors/advising committees assigned for the effective date. If necessary, delete any rows that are no longer valid for the current effective date by clicking the Delete button for the row.

NEVER delete record for a past effective date – doing so will remove the history. Only records copied to a new effective date should be deleted if they are no longer valid.

11. Click the Save button.

CODE “STUDENT ADVISOR” PANEL FOR NSO

The following instructions apply to advisors who need to code the “Student Advisor” panel for New Student Orientation:

1. Navigate to: Records and Enrollment > Student Background Information > Student Advisor
2. Enter the Student’s EmplId or Last Name and First Name.
3. Select the Include History checkbox.
4. Click Search.
5. Verify you are on the “Advisor Number: 1” row.
6. Uncheck the Advised by Committee checkbox. This will remove the “AAC” in the Committee field.
7. Enter your Advisor Code in the Academic Advisor field. Press the TAB key.
8. Click the Add a Row button in the inner frame.
9. A new, blank row is added – “Advisor Number: 2”.
10. Click the lookup button for: Academic Career, Academic Program and Academic Plan to assign each of the codes.
11. Check the Advised by Committee checkbox and type “AAC” in the Committee field. Hit the TAB key.
12. Click Save.
BIOGRAPHICAL INFORMATION

1. Navigate to: Campus Community > Personal Information (Student) > Add/Update a Person
2. Enter the Student’s EmplId or Last Name and First Name.
3. Select the Include History checkbox.
4. Click Search.
5. The Biographical Details page displays.

SERVICE INDICATOR INQUIRY

1. Navigate to: Campus Community > Service Indicators (Student) > Manage Service Indicators
2. Enter the Student’s EmplId or Last Name and First Name.
3. Click Search.
4. The Manage Service Indicators page displays. Click the link in the Code column for additional details regarding the service indicator.

ASSIGN SERVICE INDICATORS

1. Navigate to: Campus Community > Service Indicators (Student) > Manage Service Indicators
2. Enter the Student’s EmplId or Last Name and First Name.
3. Click Search.
4. Click either the Add Service Indicator link or the Add Service Indicator Tool to add a new Service Indicator.
5. By default, your EmplID and name will be entered in the Placed Person ID and Placed by fields.
6. Select the Service Indicator Code, Service Ind Reason Code, Start Term, Start Date and Comments.
7. Optional: Select the End Term and End Date.
ASSIGN SERVICE INDICATORS – CONT.

8. Click Apply.
9. Click OK.

REMOVE SERVICE INDICATORS

1. Navigate to: Campus Community > Service Indicators (Student) > Manage Service Indicators
2. Enter the Student’s EmplId or Last Name and First Name.
3. Click Search.
4. The Manage Service Indicators page displays.
5. Select the link in the Code column for the Service Indicator that you need to delete.
6. The Service Indicator Details display. Click the Release button to remove the service indicator.
7. Select OK.

AUDIT SERVICE INDICATORS

1. Navigate to: Campus Community > Service Indicators (Student) > Audit Service Indicators
2. Enter the Student’s EmplId.
3. Click Search.
4. The Audit Service Indicators page displays.
5. Review the Action Code column to determine the type of action (A = Add, C = Change, D = Delete).
6. Click any field in the row to view details for the Service Indicator.

ENROLLMENT SUMMARY (STUDENT SCHEDULE)

1. Navigate to: Records and Enrollment > Enrollment Summaries > Enrollment Summary
2. Enter the Student’s EmplId or Last Name and First Name.
3. Use the drop down to select the Academic Career.
4. Select a Term to narrow the search.
5. Click Search.
6. The Search Results display. Select the appropriate row to view.
7. The courses for the term are listed. Click View All to view all the courses for the term on one page.
8. Click the Print Student List link.
9. Click the Report Manager link.
ENROLLMENT SUMMARY (STUDENT SCHEDULE) – CONT.

10. The Administration tab displays.
11. Click the Refresh button until the status is “Posted”.
12. Click the link for the report in the Description column ("Individual Student Study Rpt) to view the report.

STUDENT GRADES (BY TERM)

1. Navigate to: Records and Enrollment > Student Term Information > Student Grades
2. Enter the Student’s EmplId.
3. Select the Academic Career.
4. Click Search.
5. The grades for the term display.
6. Use the Next in List and Previous in List buttons to move through the search results.
7. Click the Term Statistics tab or link to get to-date statistics for the student.
8. Click the Student Grade Inquiry tab or link to return to the previous page.
9. Click the Print button to submit the Grades Report.
10. Click the Report Manager link to view the report.
11. The Administration tab displays.
12. Click the Refresh button until the status is “Posted”.
13. Click the link for the report in the Description column ("Grade Report) to view the report.

ENROLLMENT REQUEST

1. Navigate to: Records and Enrollment > Enroll Students > Enrollment Request Search
2. Select AKRON as the Academic Institution.
3. Click Search.
4. The Enrollment Request Search page displays. Select the Academic Career from the drop down.
5. Either enter the Term or use the lookup button.
6. Enter the Student’s EmplId.
7. Enter data in any of the other fields to narrow the search.
8. Click Search.
9. The Enrollment List frame is populated based on the search criteria.
10. Click the Fields folder tabs to view additional information.
UNOFFICIAL TRANSCRIPTS

1. Navigate to: Records and Enrollment > Transcripts > Transcript Request
2. The Transcript Request – Find an Existing Value page displays.
3. To enter an up-to-date transcript, click the Add a New Value link or tab.
4. The Institution should be AKRON.
5. Select the Transcript Type of UNOFF.
6. Select either Page or Printer for the Output Destination.
7. Click the Request Detail folder tab.
8. Enter the Student’s EmplId or Last Name and First Name.
9. Optional: To run more than one transcript at a time, click the Add a Row button and repeat Step 8.
10. Click Save.
11. Click the Process Request button.
12. The Report Results page displays after a few minutes. Note: The Print button on this page does NOT print the transcript.
13. To print the transcript, click the Request Details tab.
14. Click the Print button.

UPDATE A STUDENT’S PLAN

1. Navigate to: Records and Enrollment > Career and Program Information > Student Program Plan.
2. Enter the Student’s EmplId or Last Name and First Name.
3. Select the Include History checkbox.
4. Click Search.
5. The Student Program page displays. Check the Academic Career and Academic Program to verify you are on the correct record.
6. Check the Program Action to ensure you can make changes to this record.
7. Click the Student Plan tab or link.
8. The Student Plan page displays. Check the Academic Plan to ensure a change is required.
UPDATE A STUDENT’S PLAN – CONT.

9. Return to the Student Program tab by clicking the tab or link.
10. The Student Program page displays.
11. Click the Add a Row button.
12. A new row is added with today’s date as the Effective Date.
13. Either type the Program Action of PLNC (Plan Change) or use the lookup icon.
14. Select an Action Reason: MAJ (Change of Major) or ADV (Advising Plan Change).
15. If necessary, enter the term the change is to go into effect in the Admit Term. This step is performed by degree-granting colleges.
16. Click the Student Plan tab (or use the link).
17. The Student Plan page displays. The plan information is copied from the previous row.
18. Select the Academic Plan number that currently displays and delete the existing number.
19. Either enter the new Academic Plan or use the lookup icon.
20. Verify the Requirement Term is correct.
21. Click Save.

TEST RESULTS

1. Navigate to: Records and Enrollment > Transfer Credit Evaluation > Test Results
2. Enter the Student’s EmpId or Last Name and First Name.
3. Click Search.
4. The Test Results page displays. Tip: Use the View Tools to determine if additional rows of data exist.

View the full Training Manual online at:

http://www.uakron.edu/training/AdvisingV9.dot