

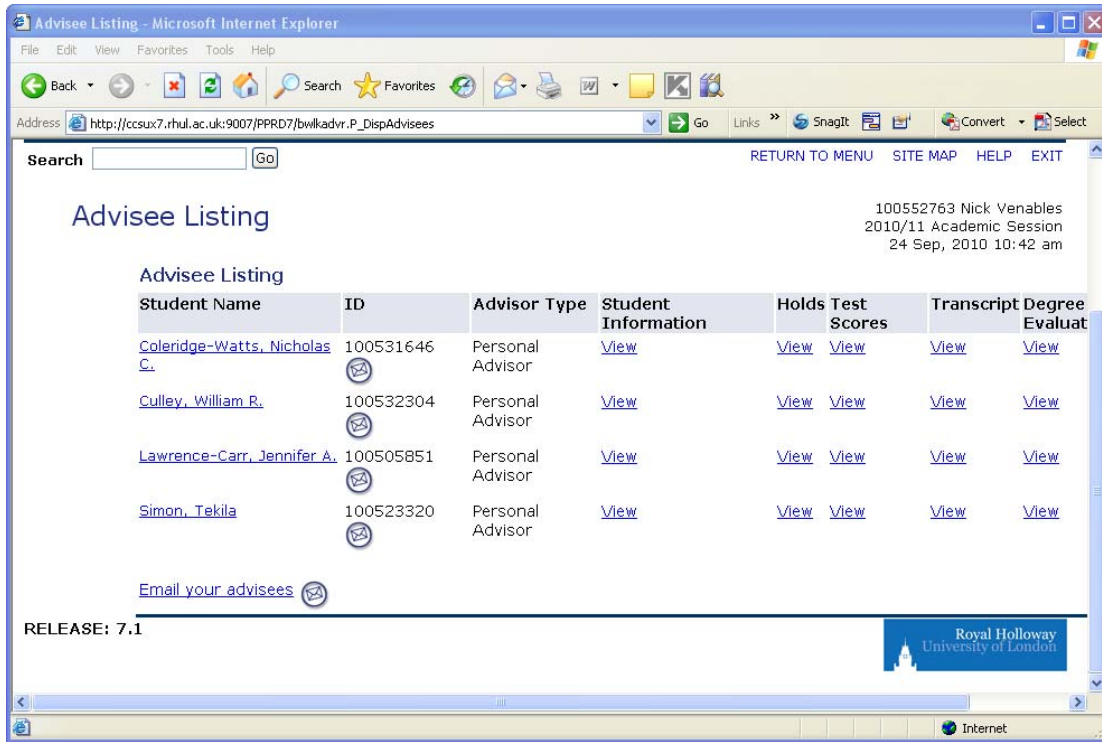
SSB for Advisors

Setup Guide

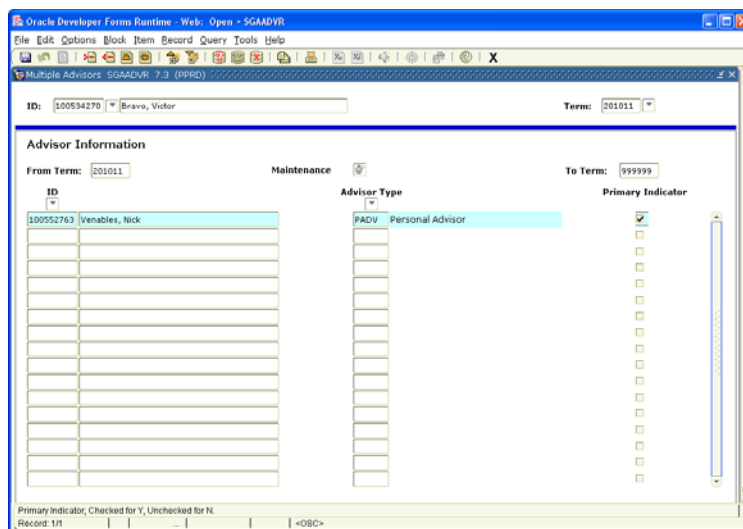


BACKGROUND

Academic staff do not currently have access to Banner INB (Banner forms) or Infoview. However, Self-Service Banner (SSB – where Gradebook is accessed) can be made available to academic staff through Campus Connect, where they can use a page called Advisee Listing to view the personal and study information of students, their prior qualifications and RHUL transcripts of results, and for e-mailing students.



To enable academic staff to use the SSB Advisee Listing, they must have a Faculty record in Banner, and be assigned to students in Banner as an Advisor. This can be done individually (one student at a time) in the Banner form SGAADVR, but this would be a time-consuming process for large numbers of students.



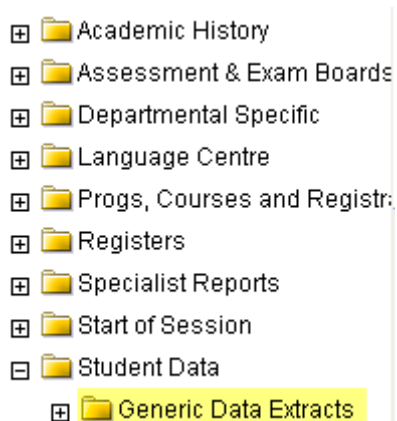
Therefore, we have worked with IT to provide a way of automatically loading Advisor/Student data into Banner, using an Excel spreadsheet created by the departmental administrator. This spreadsheet is created from an Infoview report, and lists Students and (once updated) their Advisors.

Registry Systems will then upload the data from the spreadsheet into Banner, thus granting access to the Advisee Listing page for all the academic staff listed.

This guide will explain each step necessary to prepare this spreadsheet.

1. GENERATING THE SPREADSHEET

You do not have to produce the spreadsheet from scratch, as there is an Infoview report designed to be a template for it. Go to the Departmental Administrators folder in Infoview, and expand the Student Data folder. There is a folder labelled 'Generic Data Extracts.'



Click the folder itself to display the contents in the Workspace Panel.

Click the 'Students for SSB Advisor Spreadsheet' report.

The prompts are for Department (e.g. HS), Level Code (e.g. UG) and Term (e.g. 201011).

Run the report using parameters applicable to your department.

Once the report has refreshed, you need to save it as an Excel file. Go to Document, then 'Save to my computer as' and select Excel from the list of file types, then click Open to open the report in Excel.

NB: If you have a pop-up blocked on your computer, this will be treated as a pop-up and access will be denied. To override your pop-up blocker, hold down the CTRL key as you click the Excel file type, and as you click Open.

2. EDITING THE SPREADSHEET

The spreadsheet will open and display the report in the same format as it displayed in Infoview. The first step is to remove the header bars at the top by deleting rows 1-5:

Student ID Must be Column A	Term Must be Column B	Programme Code Must be Column C	Programme Stage	Department	First Name	Last Name	Advisor ID Must be Column D	Advisor Type Must be Column E	Advisor First Name	Advisor Last Name
100505851	201011	1213	Programme Year	History	Jennifer	Lawrence-Carr				
100516493	201011	1209	Programme Year	History	James	Rodwell				

That will leave you with the correct column headers in Row 1:

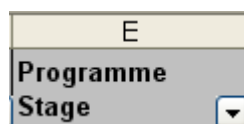
Student ID Must be Column A	Term Must be Column B	Programme Code Must be Column C	Programme Stage	Department	First Name	Last Name	Advisor ID Must be Column D	Advisor Type Must be Column E	Advisor First Name	Advisor Last Name
100505851	201011	1213	Programme Year	History	Jennifer	Lawrence-Carr				
100516493	201011	1209	Programme Year	History	James	Rodwell				

Then adjust the width of some of the columns so the headings fit. Some column headers specify a column e.g. 'Must be Column D' but you don't need to rearrange them until the final step of preparing the spreadsheet.

It is recommended you apply Auto-Filters, so you can separate students by Programme Code and Programme Stage.

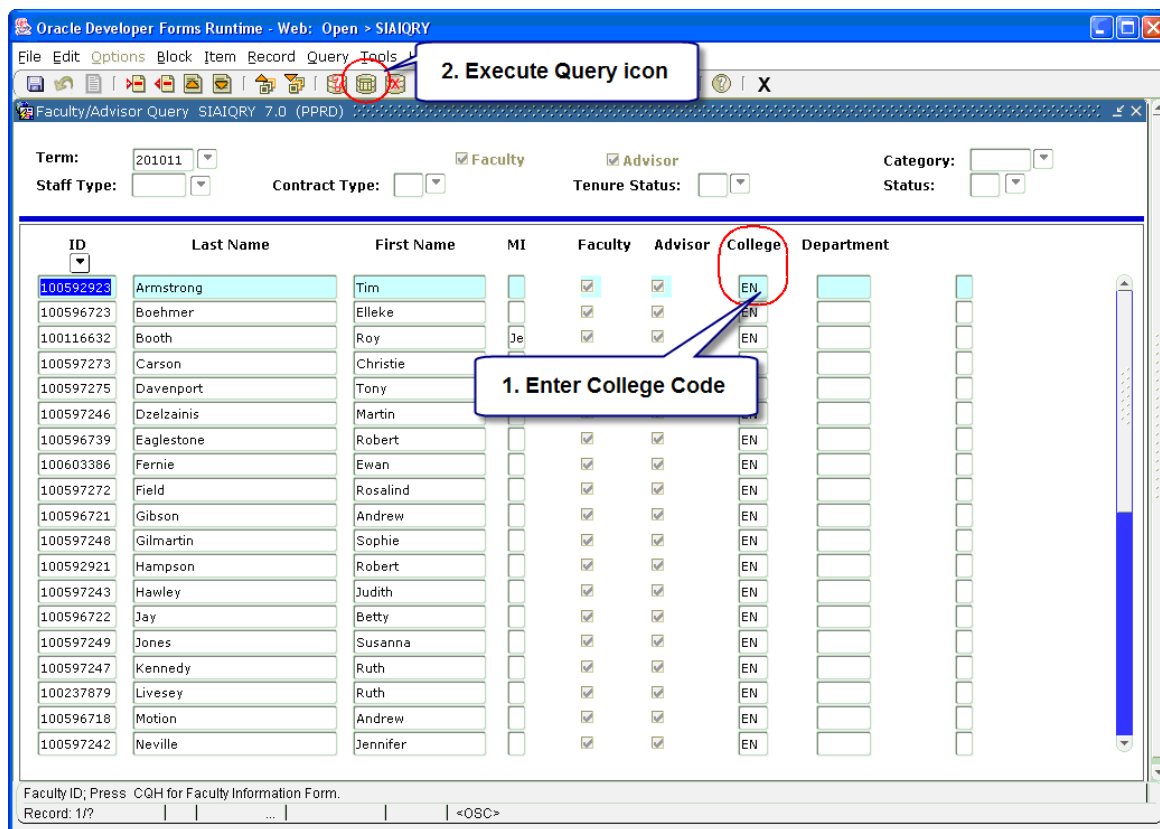
NB: If you know how to use these, skip to the next section!

To do this, click 'Data' from the File Menu and click 'Filter' from the drop-down menu, then select 'Auto-Filter'. A small drop-down arrow box appears in the bottom right corner of each column header:



When you click the drop-down box, all the possible values for that column will be listed. Click on one of them to display only the values you want, e.g. if you only want to see students in Programme Stage 1 on the spreadsheet, click the drop-down box for the Programme Stage column, and select Programme Stage 1:

When you block down, enter the College Code for your department in the College field, so you only search for members of staff from your department. Click the Execute Query icon on the Banner toolbar, or press F8 (the keyboard shortcut).

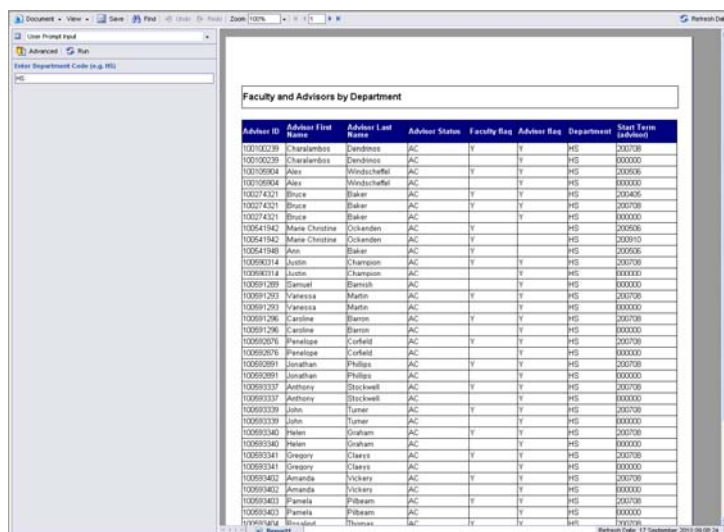


You will then see a list of the academic staff currently set up as Advisors. If any staff are missing, they might not have a record in Banner, or the Faculty and/or Advisor flags are not ticked in **SIAINST**. If in doubt, or you need new members of staff to be set up in Banner, e-mail BannerSupport@rhul.ac.uk with the details.

Use the ID for the relevant member of staff (same as a Student ID – all numbers start 100) to populate the 'Advisor ID' column on the spreadsheet.

INFOVIEW

In the Student Data -> Generic Data Extract folder in Infoview, there is also a report titled Faculty and Advisors by Department. Run this report for your department's College Code and the current Term. This will list ALL members of Faculty in the department, so you can find their ID from this report in order to populate the spreadsheet.



Advisor ID	Advisor First Name	Advisor Last Name	Advisor Status	Faculty Reg	Advisor Reg	Department	Start Term (yearweek)
100100239	Charalambos	Dandinos	AC	Y	Y	MS	200708
100100239	Charalambos	Dandinos	AC	Y	Y	MS	800000
100100904	Alex	Windschaffel	AC	Y	Y	MS	200906
100100904	Alex	Windschaffel	AC	Y	Y	MS	800000
100214201	Bruce	Baker	AC	Y	Y	MS	200405
100214201	Bruce	Baker	AC	Y	Y	MS	200505
100214201	Bruce	Baker	AC	Y	Y	MS	800000
100214201	Bruce	Baker	AC	Y	Y	MS	800000
100541942	Maria Christine	Ockendon	AC	Y	Y	MS	200505
100541942	Maria Christine	Ockendon	AC	Y	Y	MS	200505
100541948	Ann	Baker	AC	Y	Y	MS	200505
100590114	Justin	Champion	AC	Y	Y	MS	200708
100590114	Justin	Champion	AC	Y	Y	MS	800000
100591289	Samuel	Barnish	AC	Y	Y	MS	800000
100591293	Vanessa	Martin	AC	Y	Y	MS	200708
100591293	Vanessa	Martin	AC	Y	Y	MS	800000
100591296	Caroline	Baron	AC	Y	Y	MS	200708
100591296	Caroline	Baron	AC	Y	Y	MS	800000
100592076	Penelope	Carfield	AC	Y	Y	MS	200708
100592076	Penelope	Carfield	AC	Y	Y	MS	800000
100592091	Jonathan	Phillips	AC	Y	Y	MS	200708
100592091	Jonathan	Phillips	AC	Y	Y	MS	800000
100593337	Anthony	Stockwell	AC	Y	Y	MS	200708
100593337	Anthony	Stockwell	AC	Y	Y	MS	800000
100593339	John	Turner	AC	Y	Y	MS	200708
100593339	John	Turner	AC	Y	Y	MS	800000
100593340	Heleen	Scratham	AC	Y	Y	MS	200708
100593340	Heleen	Scratham	AC	Y	Y	MS	800000
100593341	Gregory	Cherry	AC	Y	Y	MS	200708
100593341	Gregory	Cherry	AC	Y	Y	MS	800000
100593402	Amanda	Vickers	AC	Y	Y	MS	200708
100593402	Amanda	Vickers	AC	Y	Y	MS	800000
100593403	Janetta	Phibeam	AC	Y	Y	MS	200708
100593403	Janetta	Phibeam	AC	Y	Y	MS	800000
100593404	ShirleyAnn	Thomas	AC	Y	Y	MS	200708

4. COMPLETING THE SPREADSHEET

Use the Advisor ID to populate the Advisor ID column on the spreadsheet for each student in the current Term. You do not need to fill in the Advisor Name fields – these are optional for your reference, and so that you can check the allocations when entries have been uploaded to Banner

Finally, enter the Advisor Type for each Student/Advisor combination. For Personal Advisor (i.e. Personal Tutor), the Advisor Type should be set to **PADV**.

You are now ready to remove the extraneous columns, reset all filters, and send the final spreadsheet on for uploading into Banner.

You should be left with a spreadsheet that has just 5 columns:

- Column A** = Student ID
- Column B** = Term
- Column C** = Programme Code
- Column D** = Advisor ID
- Column E** = Advisor Type

Save it with a filename “XX_Advisors.xls” where XX is your department's College Code. Send the finished spreadsheet to BannerSupport@rhul.ac.uk and we will forward it to IT so they can upload the data into Banner. We will confirm with you via e-mail when this is done.