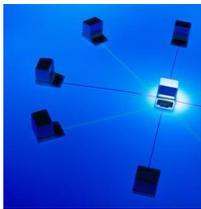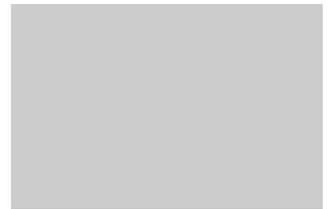# Assigning Advisors to Students

Banner 8 User Guide

August 2013

APPLICATIONS SUPPORT & DEVELOPMENT

Assigning Advisors to Students

Contents

Refer to this tutorial to learn how to assign advisors and supervisors to students.

Banner forms:

FORM	FUNCTION
SIAINST	**The Faculty Information form** Attributes determine if a staff member has access to Self-Service functions on Campus Connect including Gradebook and the Student Info Tab, and whether the member of staff can be linked to students as an Advisor (or Supervisor).
SGAADVR	**Student Advisor form.** Used to assign and maintain student's Advisor(s)
SIAIQRY	**Faculty/Advisor Query form.** Used to search for Faculty/Advisors, or query which members of staff are set up as Faculty/Advisors for specific depts.

Pre-requisites to this tutorial:

- Banner ID of staff member to be assigned.
- Banner ID of student to be updated.

The Banner term 'Advisor' refers to a Faculty member (i.e. academic or administrative staff member) who is allocated to a student for a certain purpose. Banner allows different 'advisor' types to be recorded e.g. Personal Advisor, PhD Supervisor.

If the staff member you wish to assign is not yet in Banner, if you have received the training and have the appropriate access you can follow <u>Tutorial 52: Creating and Assigning Members of Faculty</u>, to create the staff member as a 'General Person' in Banner, and designate them as a Faculty member in form **SIAINST**.

Otherwise, please contact BannerSupport@rhul.ac.uk to request a Faculty member to be set up.

You can then –
1. Grant the Faculty member access to the Student Info tab of Campus Connect (see Tutorial 52), and/or:
2. Grant the Faculty member access to enter marks in Gradebook against sections (see Tutorial 52), and/or:
3. Allocate (or de-allocate) the Faculty member as an 'Advisor' against students – refer to this tutorial.

<u>Note:</u>
Please see section 7 of this tutorial to enable a PhD student at RHUL to obtain access to Swan services at St George's and Kingston.

1. CONFIGURING ADVISORS

Banner (and this tutorial) uses one term - 'Advisor' - to cover both advisors and supervisors.

The usual Advisors used are:

PhD Students – PhD Supervisors, PhD Advisors
Masters by Research Students – Dissertation Supervisors
UG & PT Students – Personal Advisors

A student can have multiple advisors/supervisors listed against them – and please note that Research students **must** have *at least one* PhD Supervisor and *at least one* Personal Advisor. Masters by Research students **must** have a Dissertation Supervisor.

The same staff member can have more than one Advisor record for the same student, if you enter the ID twice (and use a different Advisor Type).

Note: Usually, PhD Supervisor and Personal Advisor are distinct roles and you would not expect the same staff member to be recorded as both of these Advisor Types in the same Term, except in exceptional circumstances (e.g. temporarily covering a sabbatical).

This tutorial explains how to enter an Advisor for the current Academic Term. If you need to enter Advisors for previous terms, please contact Banner Support for advice.

1.1.   If the member of staff already exists on Banner go to **SIAINST** and enter their Banner ID and the Current Term.

1.2.   Block down and check that they are set as AC - Active (Figure 1, Box 1) and both Faculty and Advisor boxes are ticked (Figure 1, Box 2 and 3).

Figure 1

1.3.   If the Faculty member will be linked to Research students as a Supervisor, you need to enter their Unit of Assessment in the Category Field (Figure 1, Box 4) by clicking the drop-down arrow and selecting from the list of values, then *Save* (This is **required** for these purposes).

2. ASSIGNING ADVISORS TO STUDENTS

2.1.   Go to **SGAADVR** (Figure 2).

Figure 2

2.2.   Enter the Student ID and the Effective Term (e.g. 201314) in the Key Block and *Block Down*.

Note:

This screen shows all current advisors from *all* terms, not just the Term selected.

2.3.   To add an Advisor enter the ID for the member of staff in the *ID* field in the first empty row (Figure 2, Box 1).

2.4.   If you do not know the ID, position cursor in the first blank row under *ID*, then click the drop-down arrow under *ID* (Figure 2, Box 2).

2.5.   This takes you to Query form **SIAIQRY** (Figure 3). Block down. Enter the Last Name and First Name of the member of staff, then click the *Execute Query* icon (Figure 3, Box 1) to view all staff members who are flagged as Advisors for this Term. Double-click the required ID. This should return you to **SGAADVR**, with the Advisor ID and name populated.
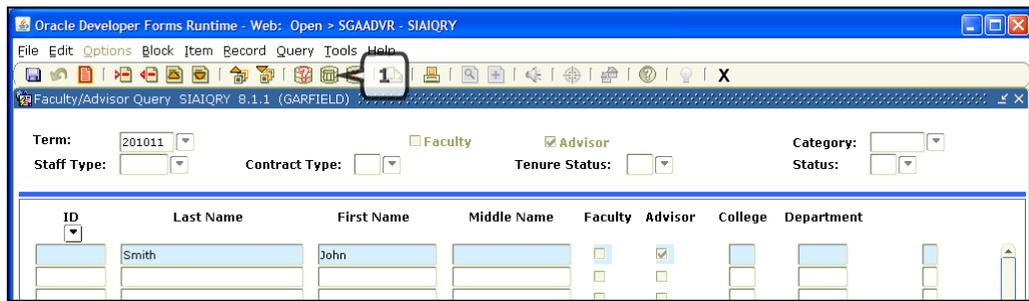
Figure 3

2.6. Click the drop-down arrow below column heading *Advisor Type* (Figure 2, Box 3) and select the relevant type from the list of values. **Always** enter Advisor type. PhD students should have at least 1 **PhD Supervisor** and at least 1 **PhD Advisor**, whereas Masters by Research students should have at least 1 **Dissertation Supervisor**.

2.7. Repeat the above process for any additional Advisors – e.g. if the student is supervised by two members of staff and also has a Personal Advisor, they would have three rows of data – even if the Personal Advisor was also one of the Supervisors (the Advisor Type would reflect the difference).

2.8. Select one Advisor as Primary by ticking the 'Primary Indicator' box (Figure 2, Box 4). Though it has no functional meaning, it is required by Banner in order to save the record. It must only be set for ONE Advisor.

2.9. If the *From Term* displayed is not the Term you wish to add an advisor in (i.e. there are already Advisor record(s) for prior Terms) press the Maintenance button (Figure 2, Box 5) and select Copy Advisor. If the Advisor(s) from the prior Term(s) is no longer an Advisor to the student, remove them (select the advisor then click Record -> Remove, or the Remove Record icon from the Toolbar) and add the new Advisor(s), and *Save*.

2.10. **If a student is being supervised by more than one PhD Supervisor** – the percentage split between them should be recorded. After assigning all supervisors and saving, select the supervisor and click on the 'light bulb' icon on the toolbar (Figure 4, Box 1).
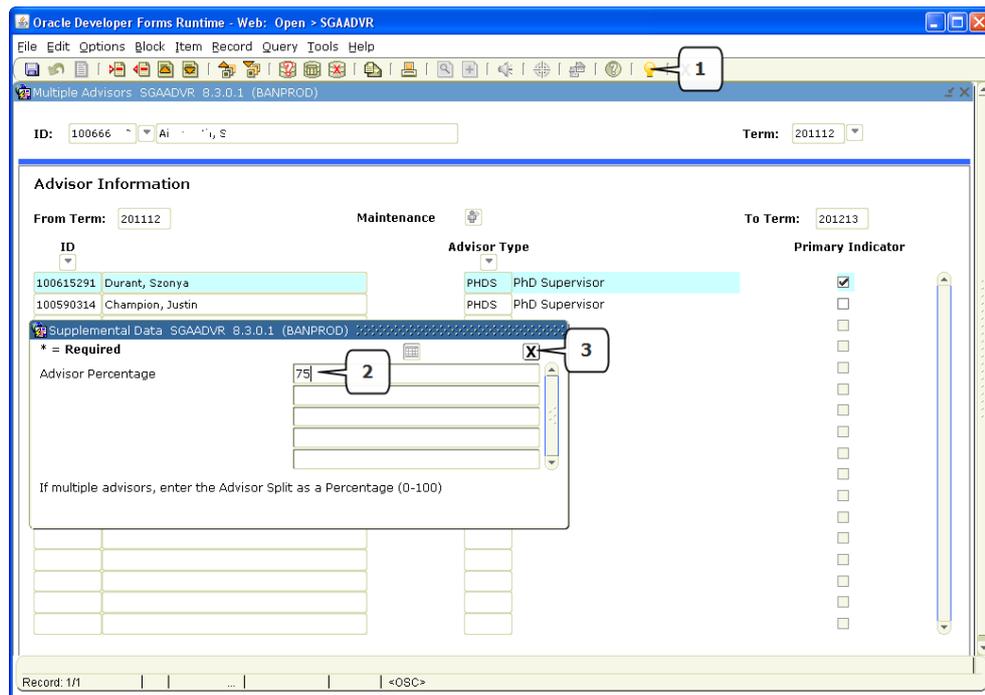
Figure 4

This will open up an additional window. Enter the percentage responsibility this supervisor has for the student as a whole number (Figure 4, Box 2). *Save* and close using the cross icon (Figure 4, Box 3). Repeat for the other supervisor(s). The percentage split can be anything, as long as the total percentage responsibility for all supervisors equals 100. Once entered and saved, the light bulb icon for that supervisor will be 'lit' and appear like this: ⚡ You do not need to do this step if there is only one Supervisor.

3. UN-ASSIGNING AN ADVISOR

3.1.   Go to **SGAADVR**.

3.2.   Enter the Student ID and Term for which the Advisor is to be removed and *Block Down*.

3.3.   The From Term will show the Term the Advisor was originally assigned to the student in. In order to end the association between Advisor and Student (i.e. removing the Advisor) click the Maintenance button (Figure 5, Box 1) and select *End Advisor*. The Advisor will still be displayed on the record, but if you *roll back* and then *block down* for the same Term, you should find that the Advisor is no longer displayed. If you *roll back*, enter the original Term, then *block down* you should see the Advisor is still assigned, and the To Date is listed as the Term in which you ended the association.
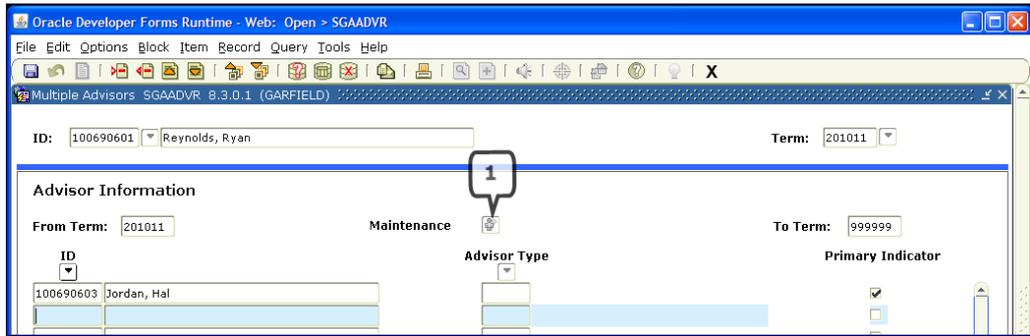
Figure 5

You will need to do this when there are changes in Advisors from one Academic Year to the next, otherwise the originally assigned Advisors will remain assigned to the student permanently.

3.4. If the student has a new Advisor, enter the new Advisor's *ID* and *Type*, and *Save* (see previous section). Repeat if additional Advisors are required.

Note: Un-assigning an Advisor from a student does not affect the Advisor's own record – if the Advisor has left the college or is no longer an active Advisor, you must update the Faculty Information in **SIAINST** (see Section 5).

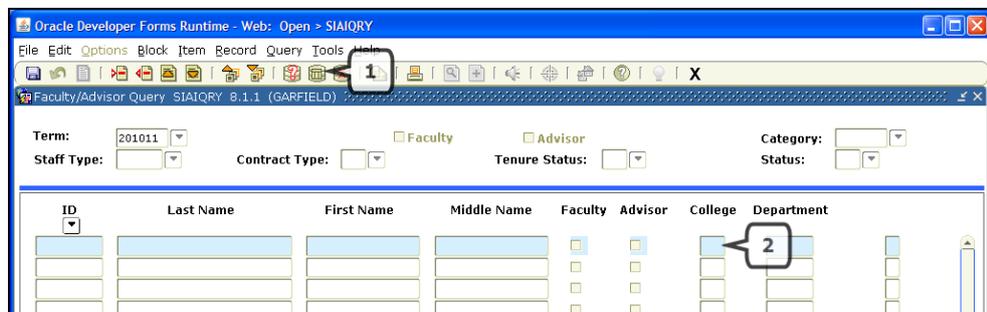# 4. QUERYING ON FACULTY/ADVISORS

4.1. Go to **SIAIQRY** (Figure 6).

Figure 6

4.2. Enter the Term code in the *Key Block* then *Block Down.*

Note: If you want to view Faculty members who are flagged as 'Faculty' only in **SIAINST**, or as 'Advisor' only in **SIAINST**, you can tick the Advisor button or the Faculty button in the *Key Block*. Otherwise leave them blank.

4.3. Click the *Execute Query* icon (Figure 6, Box 1), to will see all Faculty members flagged as Faculty/Advisor in **SIAINST** (depending on what was entered in the Key Block) across all Departments and Registry.

4.4. To view Faculty members for only one department, after you *Block Down* type the Department Code in the 'College' field (Figure 6, Box 2), then click *Execute Query.*

5. UPDATING A FACULTY RECORD

If a member of staff leaves RHUL, or is no longer considered as an Advisor, they should have their Faculty record updated in **SIAINST**. Please contact [BannerSupport](#) to do this on your behalf if you do not have access to update this form.

5.1.   Go to **SIAINST** (Figure 7).

Figure 7

5.2.   Enter the Staff Member's ID and the Term in which they are completely inactive (i.e. if they left during 200910, you need to deactivate their 201011 record).

5.3.   *Block down* and click the Maintenance icon (Figure 7, Box 1) to update the From Term (Figure 7, Box 2) to the Term from your *Key Block*.

5.4.   If the member of staff has left RHUL entirely, click the Status drop-down (Figure 7, Box 3) and select Leaver (LV). If they haven't left, but are no longer an Advisor, click the Advisor box to untick it.

5.5.   *Save*.

6. ADVISOR MAINTENANCE

This section describes some common scenarios that you may come across as part of maintaining Advisors. If you are ever unsure about exactly what setup is required, please contact BannerSupport@rhul.ac.uk to request advice; giving exact details including the advisor ID, student ID, term codes and what you want to achieve (or the problem you're having achieving it).

Scenarios:

1. The Supervisor/Advisor for a student changes halfway through the Academic Year.

2. The Supervisor/Advisor is no longer associated with a student but is still an active advisor to other students.

3. The Supervisor/Advisor is no longer associated with a student and is no longer an advisor to anyone but is still a Faculty member.

4. The Supervisor/Advisor leaves.

What to Do for Each of the Above Scenarios:

1. Enter the Term and Block Down. Leave the original Advisor and add the new Advisor. If the Primary Indicator box is ticked for the original Advisor, untick it and tick it for the new Advisor. Save then roll back, enter the next Term in the key block, block down and click the Maintenance button, then End Advisor. Roll back, then block down and add the Advisor who is continuing with that student.

2. Enter the Term which is 1 higher than the last Term, block down and click Maintenance, then End Advisor.

3. Same as point 2 but then go to SIAINST for the current Term, click Maintenance, uncheck the Advisor box and remove the Unit of Assessment from the Category by clicking in the box and removing the text. The press Tab on the keyboard.

4. Same as point 3, but instead of unticking the boxes, just enter LV in the Status field (see **Section 3**).

7. ENABLE PHD SWAN STUDENT TO ACCESS SERVICES AT KINGSTON AND ST GEORGE'S.

If you have a PhD student in your department who is based at RHUL (i.e. has a RHUL student record in Banner) but is jointly supervised by a SWan supervisor at St Georges or Kingston, they are entitled to provision of services at those 2 institutions. See http://www.swlacademicnetwork.ac.uk/index.html for more information.

This is achieved by you assigning a SWan supervisor to the student in Banner form **SGAADVR**.

Once you have done this, the student will be included in the automated interface sent from Banner by IT each day to Kingston and St Georges (who will then provide the students with access to their portal and other services as per the website above).

Follow Section 1 of this tutorial to enter a SWan supervisor against a student – but always enter the Advisor Id 100638347 and supervisor type of SWSG or SWKU.

If you wish to record the actual name of the SWan supervisor here, contact Registry Systems for advice on creating external faculty in Banner.

A student might have both SWan supervisor(s) *and* RHUL supervisor(s) in **SGAADVR.**

The existing Supervisor reports in Infoview include SWan supervisor types.

Note: if a PhD student is based at St George's or Kingston, those institutions are responsible for sending information about that student on their interface files to RHUL.