

# Academic Advising Assign Advisors - Batch Process

## Overview

IU has functionality for the batch loading of Assigned Advisors. The batch upload process should ideally be used when large numbers of students are involved. The manual Assign Advisors process should be used when fewer than 20 students are involved. See the Online help Assigning an Advisor to a Student job aid for instructions on the manual process.

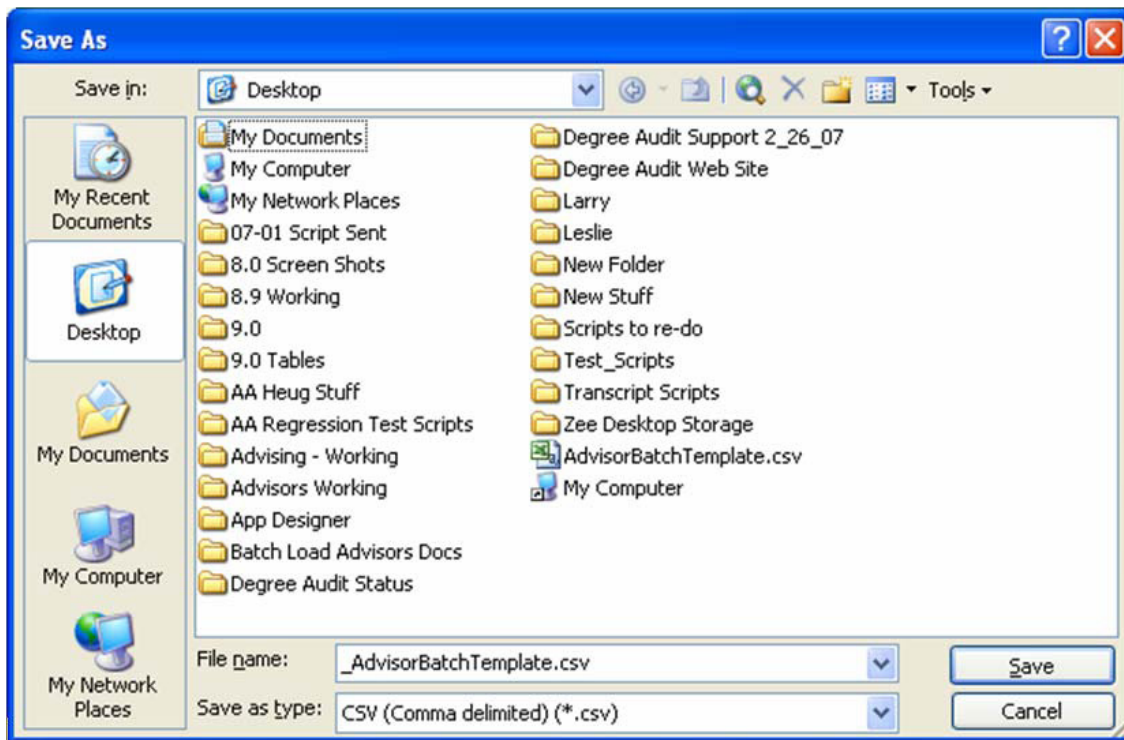
**NOTE:** Files will only be processed if submitted by authorized users. For authorization please contact Jim Murray (jmurray@indiana.edu) or Larry Hill (larrhill@iupui.edu).

## Steps

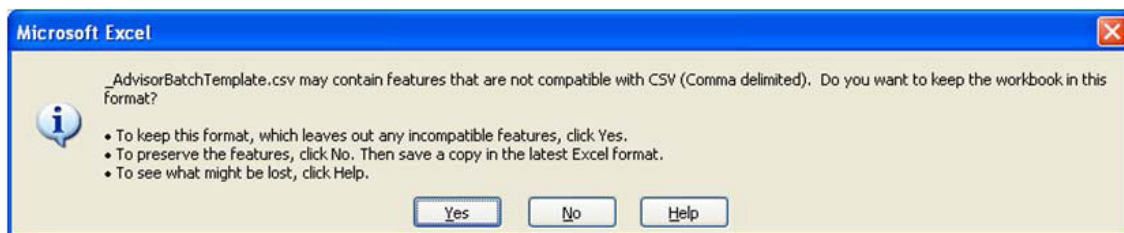
The process of batch loading assigned advisors is as follows. The specific steps for completing the template will be covered later in this document.

1. Open a web browser and go to: [https://usss.iu.edu/\\_requires\\_cas/batch-processing.html](https://usss.iu.edu/_requires_cas/batch-processing.html)
  - a. Authenticate when prompted
  - b. Click on “Academic Advising Batch Processing”
  - c. Click on “Academic Advising Batch Processing app”
2. To download and complete the template, click the [Advisor Batch Template](#) link.
3. Save the template under a new name.
4. Once the template has been downloaded, you will need to either move the instructions down on the template or delete them.
5. Place the required data (specific instructions start on page 5) in the appropriate fields in the template.
6. Fill out the fields as instructed on the spreadsheet.
7. Go to *File, Save As* and enter the name of your file in the *File name* field. In the *Save As Type* field, click the drop-down arrow and select *CSV (Comma delimited) (\*.csv)*.
8. Click **Save**.

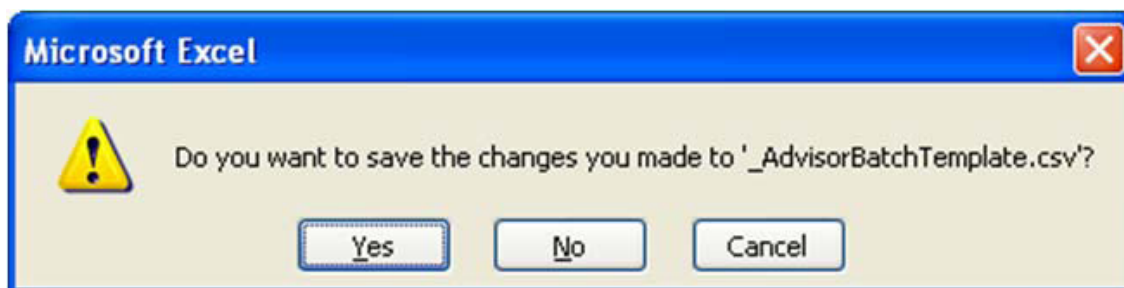
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9. You will receive a warning that your file may contain features that are not compatible with CSV. Click **Yes** to continue

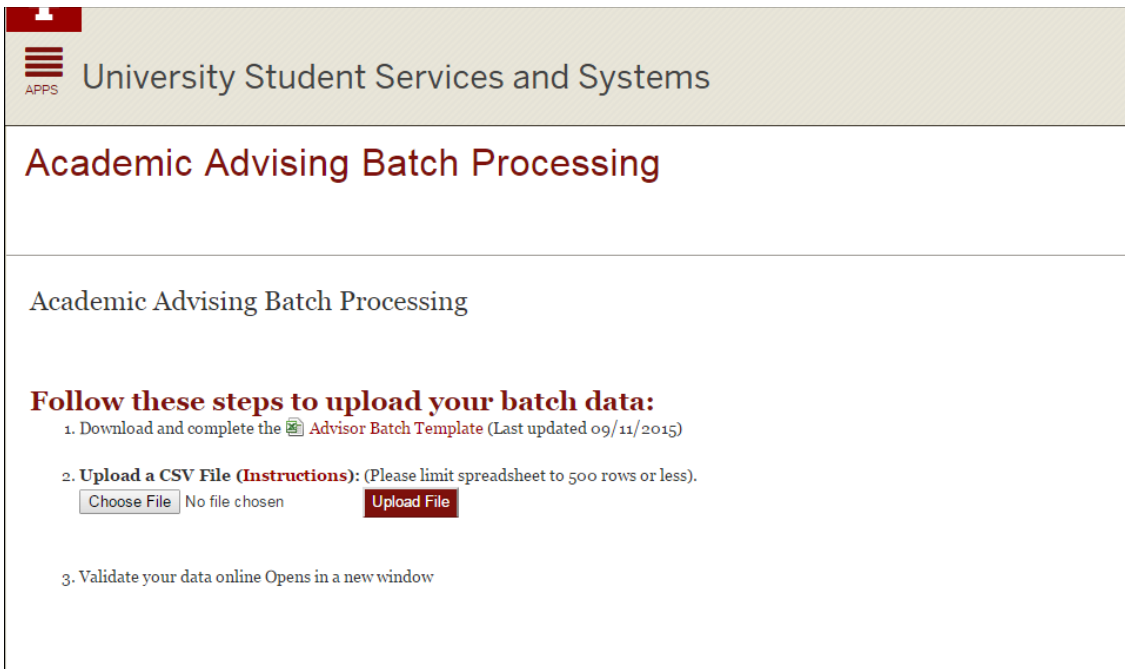


10. You will receive the following message. Click **No** to continue



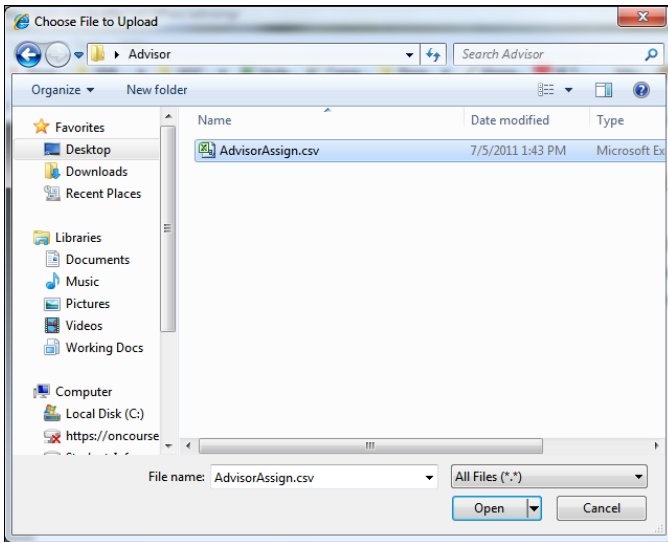
11. Once you have saved your file in .CSV format, go back to the Academic Advising Batch Processing page of USSS website to upload your file (see step 1).
12. If you are not already logged into CAS, you will be prompted to authenticate.

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The screenshot shows the USSS website interface. At the top, there is a header with the USSS logo and the text "University Student Services and Systems". Below this, the main heading is "Academic Advising Batch Processing". Underneath, there is a sub-heading "Academic Advising Batch Processing". The main content area contains the instruction: "Follow these steps to upload your batch data:" followed by three numbered steps: 1. Download and complete the [Advisor Batch Template](#) (Last updated 09/11/2015); 2. Upload a CSV File (**Instructions**): (Please limit spreadsheet to 500 rows or less). Below this step, there is a "Choose File" button, the text "No file chosen", and an "Upload File" button; 3. Validate your data online Opens in a new window.

13. Click the **Choose File** button and find your saved .csv file.



14. Select the file, then click **Open**.


15. The file name will appear on the USSS web page.

# Academic Advising Assign Advisors - Batch Process

## Academic Advising Batch Processing

### Academic Advising Batch Processing

#### Follow these steps to upload your batch data:

1. Download and complete the  [Advisor Batch Template](#) (Last updated 09/11/2015)
2. **Upload a CSV File (Instructions):** (Please limit spreadsheet to 500 rows or less).

AdvisorAssign.csv

3. Validate your data online [Opens in a new window](#)

16. Click the **Upload File** button. The name should disappear and the [Validate your data online](#) link becomes red. Click this link.

3. [Validate your data online](#) Opens in a new window

A new window should open with the results of the validation. If you have any errors, they will be listed on the screen. Any errors must be corrected prior to submitting the batch. To correct an error, simply put your cursor in the field on the page and enter the correct value.

Below is a listing of descriptions of any errors in your uploaded spreadsheet. Any fields that are not valid are highlighted in red. To correct these errors, click in the field, correct the error, and tab to the next field. Validation may take a moment.

If you do not have any fields highlighted in red, scroll to the bottom of the page and click 'Continue to Next Page' or 'Submit Batch.'

**The Following Errors Require Attention**

- Row 3: Action must be an 'A' or an 'I'.
- Row 4: University ID University ID must be 10 or fewer integers.
- Row 5: Last Name must be 30 or fewer characters.
- Row 6: First Name must be 15 or fewer characters.
- Row 7: Institution Code must be one of 'IUBLA', 'IUCOA', 'IUEAA', 'IUFWA', 'IUIINA', 'IUKOA', 'IUNWA', 'IUSBA', or 'IUSEA'.
- Row 8: Advisor Role must be one of 'ADVR', 'QEC', 'THES', 'ADAT', 'ADHR', 'ADIN', 'ADFC', 'ADFM', or 'ADOF'.
- Row 9: Academic Career must be one of 'UGRD', 'GRAD', 'LAW', 'MED', 'DENT', 'OPT'
- Row 10: Academic Program is Required when Advisor Role is 'ADVR', 'QEC', or 'THES'

Row	Action	University ID	Last Name	First Name	Institution Code	Advisor Role	Academic Career	Academic Program	Academic Plan	Advisor ID	Committee ID	Committee Person Code	Approve Grad	Approve Enrollment	Advising Office	Assign Advising Office
1	I	0000001113	Arcade	Penny	IUINA	ADVR	UGRD	TECH1	OLSBSBS	0000002222		N	N	N		N
2	A	0000001114	Boredom	Diana	IUINA	ADVR	UGRD	TECH1	OLSBSBS	0000002222		N	N	N		N
3	A	0000001115	Banks	Bonnie	IUINA	ADVR	UGRD	TECH1	OLSBSBS	0000002222		N	N	N		N
4	A		Dracul	Vladimir	IUINA	ADVR	UGRD	TECH1	OLSBSBS	0000002222		N	N	N		N
5	A	0000001116		Cramer	IUINA	ADVR	UGRD	TECH1	OLSBSBS	0000002222		N	N	N		N
6	A	0000001117	Grimes		IUINA	ADVR	UGRD	TECH1	OLSBSBS	0000002223		N	N	N		N
7	A	0000001118	Children	Alma		ADVR	UGRD	TECH1	OLSBSBS	0000002223		N	N	N		N
8	A	0000001119	First	Hugo	IUINA		UGRD	TECH1	OLSBSBS	0000002223		N	N	N		N
9	A	0000001110	Southern	Belle	IUINA	ADVR		TECH1	OLSBSBS	0000002223		N	N	N		N
10	A	0000001111	Last	Firstin	IUINA	ADVR	UGRD		OLSBSBS	0000002223		N	N	N		N
11	I	0000001112	Angel	Ima	IUINA	ADVR	UGRD	TECH1	OLSBSBS	0000002223		N	N	N		N

17. After any errors have been corrected, click the **Submit Batch** button. The USSS web page will appear with a message that your file has been submitted successfully.

3. [Validate your data online](#) Opens in a new window

→ Your file has been submitted successfully. If you have any questions, please send an email to [SES - Batch Processing](#).

# Academic Advising Assign Advisors - Batch Process

18. To submit another file, start over with step 1.

## Adding an Advisor to an Existing Student with No Assigned Advisor

**NOTE:** If you are assigning advisors to just a few students, it is recommended that you use the manual method at Records and Enrollment > Student Background Information > Student Advisor.

In the template, all fields with yellow headings are required fields.

A	B	C	D	E	F	G	H	I
Action	University ID #	Last Name	First Name	Institution Code	Advisor Role	Academic Career	Academic Program	Academic Plan
J	K	L	M	N	O	P	Q	R
Advisor ID	Committee ID	Committee Person Code	Approve Grad	Approve Enrollment	Advising Office	Assign Advising Office	Allow Planner Submissions	Opt Out of Auto Inactivation

The following are the fields in the template and what they must contain.

- Action:** Must be one of two values; an upper case A (Add) or an upper case I (Inactivate). To add an advisor use upper case A.
  - University ID:** Should be the student's university ID, not National ID. It must be 10 characters in length including any leading zeros.
  - Last Name:** Enter the student's last name.
  - First Name:** Enter the student's full first name as it is in SIS...no nicknames.
  - Institution Code:** Either type in the Institution Code or use the drop-down menu.
  - Advisor Role:** Nine values are possible: **Academic Advisor (ADVR)**, **Athletic Advisor (ADAT)**, **Faculty Advisor (ADFC)**, **Faculty Mentor (ADFM)**, **Honors Advisor (ADHR)**, **Success Coach (ADIN)**, **Qualifying Exam Committee (QEC)**, **Thesis Committee (THES)**, and **Advising Office (ADOF... use only if office has been setup in SIS prior to the assignment)**.
  - Academic Career:** This must be the student's current academic career. The values are; UGRD, GRAD, LAW, OPT, DENT, or MED.
    - A career that does not apply to the student cannot be entered. For example, **UGRD** (Undergraduate) cannot be entered for a **GRAD** (Graduate) student.
    - You must enter a Career level for any advisor assignment.
    - You should assign advisors at only at the CAREER level – with no programs or plans – if the advisor is assigned to students across multiple programs (schools) and/or plans (majors).  
EXAMPLES: advisor is assigned to students in campus-wide honors or athletics.
- NOTE:** People in the Academic Advisor and Faculty Advisor roles cannot be assigned only at the Career level. Advisors in other roles, such as Athletics Advisor may be assigned at the Career level.
- Academic Program:** This must be the student's current academic program. Use the SIS program codes; for example, EDUC1.
    - A Program that does not apply to the student cannot be entered.
    - It is possible that a student may have more than one Program.

# Academic Advising

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- You should assign advisors only at the CAREER AND PROGRAM levels (with no plans) if the advisor is assigned to students in multiple plans (majors) within one program (school).  
EXAMPLE: advisor is assigned to students in all majors within the Business School.

**NOTE:** Advising Office, Athletic Advisor, Faculty Mentor, Honors Advisor, and Success Coach are not Program specific and must not have a Program assigned. These advisor roles will go with the student even if they change Programs.

9. **Academic Plan:** This field is optional, but if entered it must be one of the student's current academic plans as entered in SIS.
- A Plan that does not apply to the student cannot be entered.
  - It is possible that the student might have more than one plan.
  - You should assign advisors at the CAREER, PROGRAM, and PLAN levels if the advisor is assigned to students by plan (major). EXAMPLE: advisor is assigned to Chemistry majors.
10. **Advisor ID:** If the student is being assigned an individual advisor not a committee OR an advising office, this field must be completed using the advisor's SIS Emplid. If a committee OR and advising office is being assigned as the advisor this field must be left blank.
11. **Committee ID:** If a committee is being assigned as the advisor, the Committee ID should be entered here. The committee must be a pre-existing committee. If a single advisor OR an advising office is being assigned to the student this field must be left blank.

**NOTE:** Under no circumstance should more than ONE of the following fields be completed: **Advisor ID, Committee ID, Advising Office.**

12. **Committee Person Code:** If you are assigning an individual advisor OR an advising office, this field should be N. If you are assigning a committee it should be a Y. You may either type in the value or use the drop-down menu.
13. **Approve Grad:** If the assigned advisor or committee must approve the student's graduation, this field should contain a Y, otherwise it should contain an N. The above field is for referential purposes only, but it is required.
14. **Approve Enrollment:** If the advisor or committee must approve this student's semester drop and add activity via the eForms workflow, this field should be a Y. Schools may use Assign Advisor without eForms impact by entering N for the batch process and/or by leaving this field blank in the Manual Process. The value N will result in eForms bypassing the assigned advisor and instead being routed to eForms workgroups defined by the schools.

**CAUTION:** If a Y is placed in the **Approve Enrollment** field, eDrops will be sent to the assigned advisor or committee for approval.

15. **Advising Office:** If an advising office is being assigned instead of an individual advisor OR a committee, complete this field and leave both the Advisor ID and Committee IDs blank.
16. **Assign Advising Office:** If you are assigning an individual advisor OR a committee, this field should be N. If you are assigning an advising office it should be a Y. You may either type in the value or use the drop-down menu.
17. **Allow Planner Submissions:** If the advisor agrees to review student planners, enter Y in this field. Otherwise, enter N.

# Academic Advising

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18. **Opt Out of Auto Inactivation:** Select **Y** or **N**. This option provides the ability to opt out of the automatic inactivation of advisor and advising office assignments (see the *Auto-inactivation of an Advisor* section below for more information).

**CAUTION:** Under no circumstances should you enter anything beyond this last column. The data in the template may either be entered manually or copied and pasted from an existing spreadsheet or an IUIE report.

### Assigning a Different Advisor

Repeat all the steps for Adding an Advisor with a row for the advisor being replaced and a row for the new advisor. For the advisor being replaced, enter “I” (Inactive) in the **Action** field. For the new advisor, enter “A” in the **Action** field. Staff maintaining this information should review the student’s active program plan stack(s) to verify the student’s academic record within multiple campuses and multiple programs before deleting an advisor or committee. Student self service (My Advisors) displays all active advisors or committees assigned to the student’s institution(s)

It is the responsibility of the academic units or registrars who manage the program/plan stack to obtain the correct Advisor information whether there is a new advisor or no advisor and manage a process to keep the information in SIS up to date. Students in multiple programs may have multiple advisor assignments. When students move to a new program or add an additional program it is the responsibility of the school/recorder or registrar who manages the program/plan stack to ensure that the Student Advisor information is current.

### Inactivating an Advisor

Inactivating an advisor should happen any time a student moves from a school that assigns advisors to a school that does not assign advisors. If not inactivated, the student will continue to see his/her old advisor displayed in Self Service. To inactivate an advisor, complete all the steps for Adding Advisors with “I” (Inactive) placed in the **Action** field. All remaining fields must match existing SIS information for this student. This information can be obtained from the “Student Advisors (no bio data)” report generated by the IUIE.

### Auto-inactivation of an Advisor

Automatic inactivation of advisor and advising office assignments will occur if:

- The program/plan stack is Completed (student has graduated)
  - The program/plan stack is Cancelled (student never arrived on campus)
  - The program/plan stack is Discontinued (student has not been enrolled for 3 consecutive fall/spring terms)
  - The student is no longer active in a program for which an advisor was assigned to the student – and the student was assigned only at the program level
  - The student is no longer active in a plan for which an advisor was assigned to the student – and the student was assigned at the plan level
- EXCEPTIONS: University Division (IUB) and University College (IUPUI) – if the student changes pre-majors but stays within UD or UC, the advisor assignment will not be inactivated
- The student is Deceased

These are the only six actions that will result in automatic inactivation of advisor assignments. Advisor assignments for other programs/units will not be affected.

Auto-inactivation is run every week night.