Advisor Assignment Application Guide



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Advisor Assignment Overview

The **Advisor Assignment** application allows Department Administrators and their proxies to create, view, and edit primary advisor assignments online, at any time.

Login

The login process uses Touchstone which makes the system available on your computer using certificates or any computer using your Kerberos username and password.

Roles

As you log in you are given access to students and advisors based on your role which has been set up for you. This ensures that you only make assignments for advisors and students in course/level/options for which your role grants access.

Key Features of the System

- the system makes assignments for the current term but rolls forward those assignments into future terms until a different assignment is made
- this system allows for the assignment of one academic advisor / registration officer for each of a student's major(s) or program(s)
- any employee may be assigned as an advisor
- students are only assigned advisors for relevant course/level/options
- assignments may be imported into the system

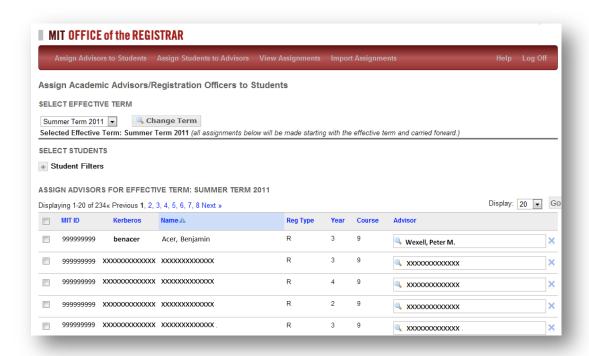
This document will show how to

- 1. Assign Advisors to Students
- 2. Assign Students to Advisors

You may access the Advisor Assignment Home Page at the following address: https://eduapps.mit.edu/assignadvisors/.

Advisor Assignment Home Page

This is the Home screen for Assign Academic Advisors/Registration Officers to Students.



The title of this screen is displayed immediately below the maroon menu bar (see arrow above).





Assign Academic Advisors/Registration Officers to Students

Menu Options

Assign Advisors to Students – select an advisor for a student (current page shown above)

Assign Students to Advisors – assign groups of students to an advisor

View Assignments - displays a list showing students and their advisor assignments for current projected terms (usually one "major" (aka, Fall, Spring) and one "minor" (aka, IAP, Summer) term

Import Assignments – allows you to upload a file of stored advisor assignment information

Help – displays Help documentation pages

Log Off - ends your session but be sure to close your browser to complete the process

Assign Advisors to Students

From here you will be able to:

- 1. Select the effective term
- 2. Search for students by filtering
- 3. Assign an advisor to an individual or group of students
- 4. Print and export data

Select the Effective Term

The <u>selection of the effective term is significant</u> because advisor assignments are carried forward to future terms. The assignment you make will be effective from the selected term to all future terms projected in MITSIS (one or two terms past the current term).

**This assignment will remain in effect for future terms until it is changed through this system.

The Effective Term defaults to the current term.



1. From the drop down menu select the desired term



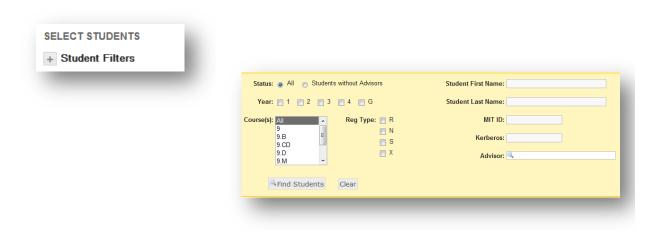
2. Click Change Term

Student assignments displayed will be for the effective term selected in this step. Only course/level/options appropriate for the currently logged-in user will be displayed for any filtered results.

Select Students

The Select Student feature lets you search for a student by name, MIT ID, or Kerberos username. More significantly, it lets you search for groups of students by any combination of year, course and registration type. You can also further filter to see students with assigned advisors or students who have not yet been assigned to advisors.

Look for SELECT STUDENTS under the Term Selection area. Click the Plus (+) next to **Student Filters** to show the yellow criteria box.



Using Student Filters

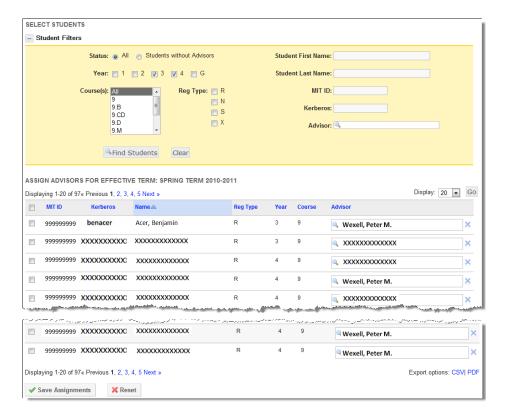


- 1. Enter student information on the right to locate an individual student. Otherwise choose criteria on the left to locate groups of students.
- 2. You may also enter an **Advisor** name on the right to see all students assigned to this advisor. As you begin to type an Advisor's first or last name an *auto-complete list of choices will show. Click the name in the list to enter it.

- * You <u>must</u> click an advisor's name from the auto-complete pop-up list for the system to recognize your choice.
- 3. Choose **All** students to see the full list. If you select **All** there is no need to select anything else.
- 4. Select any combination of Year, Course and Reg Type. These choices will filter records from the complete set and show a list <u>also</u> based on your choice of All or Students without Advisors. You may select multiple courses which are contiguous with the click-shift-click method or non-contiguous by clicking the first, holding the control key then clicking the second.
 - *All information is based on the effective term selected (e.g., student year, advisor assignment).
- 5. Select **Students without Advisors** to see only students without advisors assigned.
- 6. Click **Find Students** when you are satisfied with your choices. Click **Clear** to make a new set of choices.
- 7. Click the Minus (-) sign next to **Student Filters** to close the yellow, filter box.

List of Students

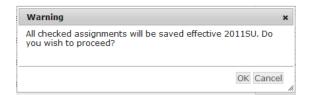
The list of students you see reflects the choices you have made in the Student Filters box. This list is filtered to show all Year 3 and 4. The total number of students who meet the criteria chosen below is 97.



- 1. Just above the list on the left you will see how many names the page is displaying out of the total set of students. Click the Previous, Next and page number links to view other screens.
- 2. The screen is set to show 20 names per screen. Change this on the far right using the popup list. Make a choice (10, 20, 50, 100 or All) then click Go.
- 3. Click a column head to sort ascending. Click again to sort descending. The default sort order is last name, first name, MI, then MIT ID.
- 4. Students with multiple majors or programs will show multiple records, but only if you have access.
 - a. Student records will show the currently assigned primary advisor, or they will be blank.
 - b. Click the X to unassign an advisor.
 - c. Assign an advisor by typing an advisor's name in the Advisor box on the far right of each row and selecting a name from the auto-complete list.
- ** Remember, advisor assignments will carry forward from this effective term for one or two terms forward depending on the point in the year.

During this term	Assignments will be projected for these terms
Fall	Fall, January, Spring
January	January, Spring
Spring	Spring, Summer, Fall
Summer	Summer, Fall

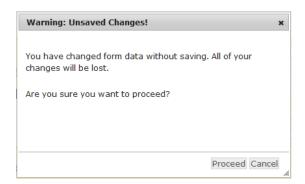
- 5. Any MIT employee may be added as an Advisor in the student's record (not the yellow filter names box).
- 6. Any change to the advisor box will cause the check box at the far left of a row to become checked. All checked records will be saved whether you've assigned an advisor, or unassigned an advisor. You may uncheck any record to prevent saving that record.
- 7. Click **Reset** to clear any changes since the last save. Click **Save Assignments** to save the edits you've made since the last save. You may make as many advisor changes as you like before saving.
- 8. When you save you will see the following messages.



9. After you save you will see a confirmation message.

Changes have been successfully saved.

10. If you try to leave this screen before saving you will see the following message.



11. If you try to logout before saving you will see the following message.

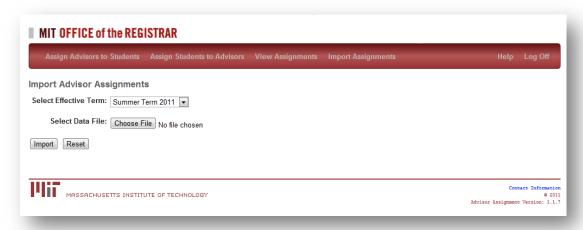


12. On the bottom right are links to print a PDF copy or to export the data. The students displayed on the screen will be printed to a PDF or exported. Note that this may not include all students from the initial filter, unless they are all displayed.

Export options: CSV| PDF

Import Assignments

The Import Assignments page allows you to import advisor assignment information kept in an external file.

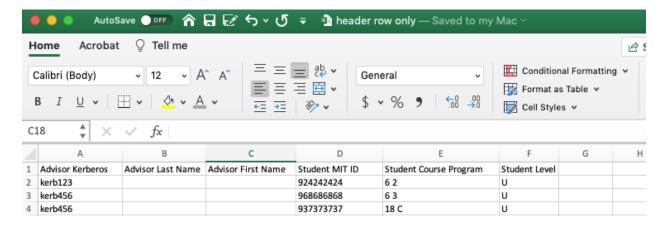


Format your data

Your file must be in .csv or .txt format, and must include six columns with this exact header row:

- Advisor Kerberos
- Advisor Last Name
- Advisor First Name
- Student MIT ID
- Student Course Program
- Student Level

Although columns for Advisor Last Name and Advisor First Name are required, the data itself is not required and can be left blank. All other data are required.

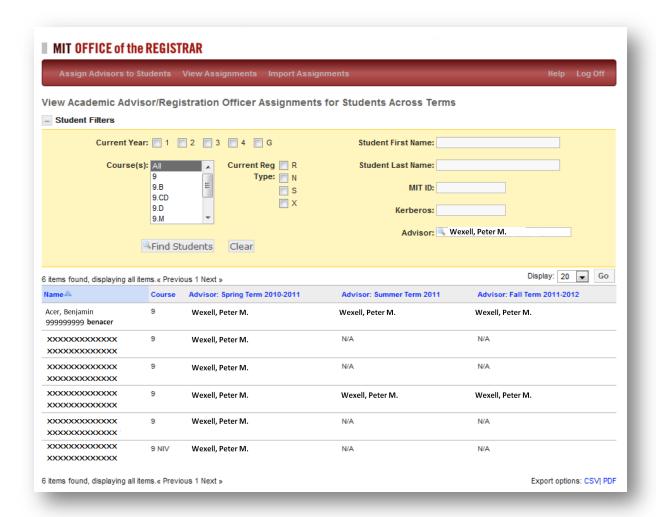


Import your data

- 1. On the "Import Assignments" page, select an "effective term" from the dropdown.
- 2. Click "Choose File" to browse your local machine to find the file, formatted per the above.
- 3. Click "Import" and a report will be generated indicating success or error for each row of data.
- 4. Errors will indicate a reason for the import failure so you may adjust your source file and import again.
- 5. Note that header rows will generate a "Student MIT ID is not valid" error, but the error can be ignored.

View Assignments

The View Assignments screen lets you see advisor assignments in a read-only format. Based on the filter criteria, this screen shows a list of this advisor's students for the current term and projected terms.



- 1. The list will display names based on your filter criteria. Setting filter criteria works the same as on the **Assign Advisors to Students** page.
- 2. Each student's name, MIT ID, and Kerberos username are displayed in the first column.
- 3. The current term advisor assignment is displayed. One, or possibly two additional future term advisor assignments are also displayed.
- 4. Navigation works the same as on the **Assign Advisors to Students** page.
- 5. The current list may be exported to a PDF file to print or a .csv file to open in Excel.

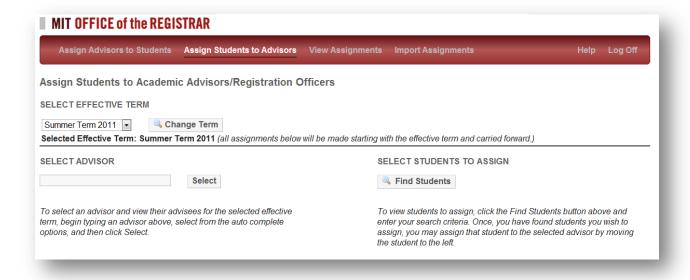
Assign Students to Academic Advisors/Registration Officers

The **Assign Students to Advisors** screen allows you to find groups of students based on filter criteria and assign an entire group quickly to an advisor. For any advisor, you can view all their student advisees. You can also see for each advisor a summary table of information about their advisees. The picture below displays what you will see when you first arrive at this screen.

The Assign Students Process

- 1. Select an advisor and find a set of students based on filter criteria
- 2. Move students left to assign or right to unassign
- 3. Save your changes

After selecting the Effective Term, an Advisor and his or her assigned student advisees may be viewed on the left. Students will be listed on the right based on your filter criteria. You may move unassigned students from the list on the right to the Advisor's list on the left to <u>assign a student</u> to that advisor, or left to right to <u>unassign the</u> student.

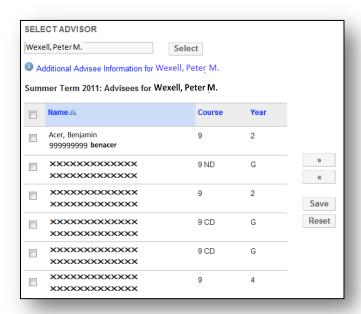


Select the **Effective Term**. Click Change Term if you want to make a change. All assignments will be for the Effective term and will be carried forward to one or possibly two successive terms.



Select Advisor

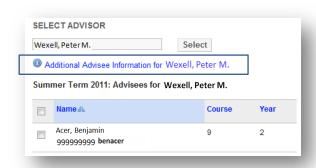
Enter an advisors name in the **Select Advisor** box. The select box uses autocomplete to generate a list of names based on the letters you type. Select the desired advisor name and click **Select**. The list of all advisees assigned to this advisor will be shown.



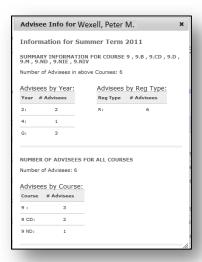
- 1. The term and advisors name are listed right above the list of students.
- 2. The student's last name and first name, MIT ID and Kerberos username are displayed along with their course and year. Remember, if this is a future term the year may be a future year.
- 3. The columns may be sorted by clicking on the column heading.
- 4. A name or names may be selected by clicking the check box. Once selected, a name or names <u>may be</u> <u>unassigned from this advisor</u> by clicking the right arrows (>>) and moving them from the left to the right. The entire set of names may be selected by clicking the check box in the column heading.

View Advisee Information

Click the **Additional Advisee Information for...** link to open a summary table of information to assist you in making decisions about which, and how many students to assign to this advisor.

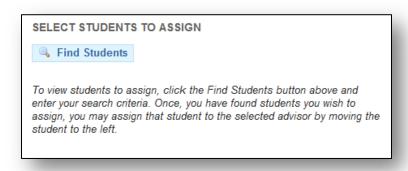


The **Advisee Info** table summarizes for an advisor the number of **Advisees by Year** and **Advisees by Reg Type** for the <u>students which you are authorized to see</u>. The summary of **Advisees by Course** includes <u>all courses for which the advisor has advisees</u>.

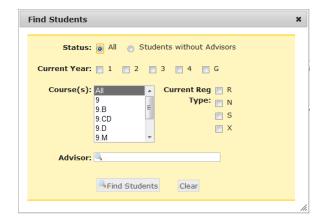


Select Students

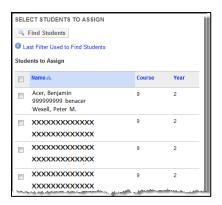
On the right side of the screen you will see **Find Students**. Here you can locate students using filtering as explained on the **Assign Advisor to Students** page.



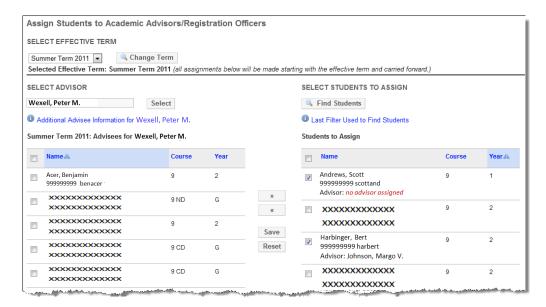
Click **Find Students** to begin the process of filtering. The following popup box will appear.



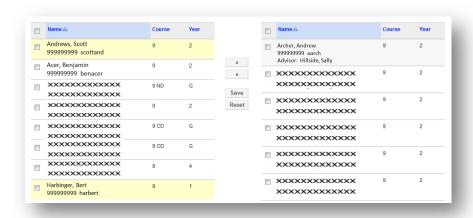
Make your filtering selections and press **Find Students** (see Page 8 for more details). A list of students is displayed which matches your filtering criteria.



Names from this student list on the right may be moved to the left under an advisor to assign that student or group of students to that advisor.



- 1. Select a name or names from either list by clicking the check box. Click the checkbox in the column heading to select all names in the list.
- 2. Click the left arrows (<<) to move the selected students to the left under the advisors name to assign students to this advisor. Click the right arrows (>>) to move the selected students to the right to unassign students from this advisor. Names which have been moved are highlighted.



- 3. Click Save to commit your changes. All records with checked boxes will be saved.
- 4. You may click to show the **Last Filter Used** in Find Students to open the filter box to redo the last filter. The filter box does not reflect changes you've made since the last search unless you redo the filter.
- 5. You may export this list to a PDF for printing or export the data to a .csv file.