

Batch Advisor Assignment

Purpose: This document will assist staff with assigning students an advisor or advising committee in batch.

Audience: Academic Advisors

 You must have at least one of these local college-managed security roles:

- **ZZ Batch Advisor Assignment**

You must also set these SACR Security permissions:

- [CS 9.2 SACR Security: Basic Requirements for Staff](#)

If you need assistance with the above security roles or SACR settings, please contact your local college supervisor or IT Admin to request role access.

 The Batch Advisor Assignment can perform the following actions:

1. Assign new or additional advisors to a student's record.
2. Reassign students from one advisor to another.
3. Remove students from an advisor's list who are no longer attending (by assigning students to a "blank" advising committee)

Prerequisites to the Batch Advisor Assignment


The following actions must be performed prior to the Batch Advisor Assignment:

1. Students must be term activated to the correct active Program/Plan stack for your institution.
2. The advisor must be entered on the Instructor/Advisor table.
3. To batch update the advisor assignment for students who are no longer term-activated and have not recently attended your institution, use the query QCS_AA_STDNT_NOT_ENR_SINCE.

Batch Advisor Assignment


Navigation: Academic Advisement > CTC Custom > Batch Advisor Assignment

1. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
2. NOTE: It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_BATCH_ADVISOR_ASSIGN.

 As always, effective dates REALLY matter! A student can only have one advisor-action per date. A second action cannot be added to the same date. For example, if you assign a primary advisor to a group of students effective today, and you run the process again to add a second advisor effective today, it will not be able to assign that second action to the same day. Those requests will all error. **Tip! For that second process, whether you are adding, changing, reassigning, use tomorrow's date!**

3. The **Effective Date** field will default to the current date.
 - a. This date can be changed to a past or future date.
4. Select your **Academic Institution** from the drop-down list.
 - a. Users can only select an institution if they have SACR Security for that institution.
5. The **Use System Date** checkbox is only needed when scheduling Batch Advisor Assignment to run automatically, if desired.
 - a. Based on security roles, some users may have the option to set the process on a **Recurrence** (located on **Process Scheduler Request** page after selecting **Run**).
 - b. The process will then populate the student advisor effective date with the day the process is actually running.
6. The **Advised by Committee** checkbox can be selected to assign students to an advising committee instead of an individual advisor.
 - a. When selected, the Academic Advisor field becomes unavailable, and the Committee field is now available.
 - b. Committees can be created on the Manage Committees page. Create a committee that correlates to the process. [Follow QRG Setting Up Committee Types and Member Roles](#).
 - c. **QCS_CC_COMMITTEE_NAMES_USE** query will help you prevent using a committee name that already exists. We also encourage you to use it before using a committee you've already created.

- i. Navigate to: Campus Community > Committees > Manage Committees to create a Committee.
7. In the **Academic Advisor** field, enter or lookup an advisor ID by selecting the looking glass.

 Academic Advisor lookup displays all IDs in the system. If the Academic Advisor is not a valid advisor in the Academic Program Table, the process will not assign an advisor.

8. The ID selected must be entered as an advisor in the **Instructor/Advisor** table.
 - a. Navigate to: Curriculum Management > Instructor/Advisor Information > Instructor Advisor Table to access the Instructor/Advisor table.
9. The **Max Advisees to Assign** field can limit the number of students who will be assigned the selected advisor. You can also enter the number **999** to have all students in the selection process assigned the advisor.
 - a. For example, if you enter 25 in this field and attach a list of 100 students, only 25 students will be assigned the advisor.
 - b. If you enter the number **999** and attach a list of 1,500 students, all 1,500 students will be assigned the advisor.
 - c. The default value for this field is blank. An error message is generated if field is blank when **Run** is selected.
10. The **Process Mode** field has two options, the default value is **Update** which will assign advisors. The other option is **Report Only** which will not assign advisors. The options are accessed by selecting the drop-down list and selecting the appropriate option.
 - a. Both values, **Update** and **Report Only** will generate a log file with a message for each student indicating whether advisor assignment was successful or unsuccessful.
11. The **Existing Advisors** field is where you can select which action will occur when the process is run.
 - a. **Add Additional Advisor.** An additional advisor is added to the student's current list of advisors. If the student does not have a current advisor, the new advisor will not be added.
 - b. **Add Additional or New Advisor.** An additional advisor is added to the student's current list of advisors or the advisor is added if student does not have an advisor.
 - c. **Assign if No Advisor.** The process will only assign an advisor for students that do not have an advisor. Students with an existing advisor for their institution will not be processed--even if they are included in the population selected.
 - d. **Overwrite Existing or Add New.** All current advisors will be replaced with the one advisor selected. If the student does not have an advisor, the advisor will be added.
 - e. **Reassign Advisor.** When selected, the **Previous Advisor ID** field becomes available.
 - I. You can replace one advisor for another. For example, if an advisor is no longer at your institution.
 - II. Enter the new advisor in the **Academic Advisor** field. Enter the advisor that is being replaced in the **Previous Advisor ID** field.

- III. You must still have a list of students for the population selection. Options include a file, population selection query or entering ID's in the Student Select List.
12. Population Selection allows users to select students using an external file (in Microsoft Excel .csv format) or by using a Population Selection query. Select the Population Selection checkbox to enable these options for the Selection Tool field.

PS Query

i PS Query (population selection). Select students using a query that contains the Batch Advisor Assignment bind record. Only queries containing the bind record can be selected here. **The two queries displayed below are default queries.**

The following queries are available for Batch Advisor Assignment:

1. **QCS_AA_ADVISOR_ASSIGN_1**
 - List of students assigned to one advisor.
2. **QCS_AA_ADVISOR_ASSIGN_2**
 - Students who are enrolled for a term that are not assigned to an advisor.
 - Colleges may request additional population selection queries for their local business process.
 - Select the **Edit Prompts** link (to the right of the Selection Tool field) and populate field with appropriate information. Fields to be populated depend on which PS Query is selected.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

View Tutorial Via Panopto

View the external link to [PS Query](#). This link will open in a new tab/window.

External File

External File. Upload a Microsoft Excel file in the .csv format with the required columns. Select the **Upload File** button.

- **Required columns** are: ID, Academic Career, Academic Program
- Academic Plan is an optional field that can be added.

i If you run a query to identify students and download results to an Excel file, you can experience issues. Please copy the query results and paste them into an Excel file for the best outcome. Save as a CSV file before using it.

To create or view an existing File Mapping, visit the QRG [Create File Mapping](#).

Create File Mapping

Create File Mapping. After the Excel .csv file is uploaded, use the lookup tool to enter a **File Mapping** value (if you have already created a file mapping for Batch Advisor) or use the **Create File Mapping** link to create a new option:

- In the File Mapping field, enter a name (you can reuse this next time you run Batch Advisor)
- Verify that File Type is Delimited.
- Verify the Field Delimiter is Comma.
- Select the Header Row checkbox.
- After selecting the Header Row checkbox, enter the Header Row Number. For example, if you have your header in the first line enter 1 in the Field Number Column in the right column of the table--*illustrated in image below*.
- In the Field Mapping area enter the Field Number that corresponds column number of your .csv file for the required fields: ID, Career, Acad Prog

i The Academic Plan is an optional field on the Student Advisor page and may be left blank during Batch Advisor Assignment.


Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

View Tutorial Via Panopto

View the external link to [Batch Advisor Assignment - No Audio](#). This link will open in a new tab/window.

Student Select List

 By default, when a new run control ID is created, only the **Population Selection** is enabled (checkbox selected), and the **Use Student Select** checkbox is unchecked. Because the **Use Student Select** checkbox is unchecked, the fields are hidden. Users will manually select the checkbox to enter a student's information into the fields. To add additional students, select the [+] icon to add a new row.

Student Select List. Select the **Use Student Select** checkbox. The process can be run with both Population Selection & Use Student Select checkboxes selected at the same time. It pulls all students from both selected sections to process--or use alone without population selection.

1. Enter student ID's. We **strongly** recommend that you enter the Career. You can leave the Academic Program and Academic Plan fields blank. The process will populate the first program/plan stack that the student is active in. If you do not populate all three fields, you will receive a warning; you can move past it by selecting **Okay** and the process will run.
2. **It is recommended that Career is always entered here to avoid the advisor being assigned to a student's Continuing Education career.**
3. If the Academic Plan field is left blank, the system will populate the academic plan on the Student/Advisor page. If you want the Academic Plan field blank, use the Population Selection tool and do not populate Academic Plan in the PS Query or .csv file.

Run the Process

1. Select **Run**.
2. The **Process Scheduler Request** page displays.
3. Select **OK**. You are returned to the Batch Advisor Assignment page.
4. **Viewing Batch Advisor Assignment Reports.**
 - a. Select the **Process Monitor** link at the top of the Batch Advisor Assignment page.
 - b. Select the **Details** link.
5. Select the **View Log/Trace** link.
6. Select the links for **CTC_ADV_ASSGN.log** and **CTC_ADV_ASSGN_ERR.log** to view results by student.
7. Process complete.