**“My Advisee”/Assign Advisor 10/31 Focus Group Meeting Wish List**

Attendees: Ken Baron (Academic and Pre-Professional Advising), Kelly Simer (Academic and Pre-Professional Advising), Michelle Bulger (Natural and Mathematical Sciences), Delana Gregg (Sondheim Public Affairs Scholars), Melanie Berry (Visual Arts), Tate Redding (Information Systems), Janet Burgee (Mathematics and Statistics), Deneen Blair (Mathematics and Statistics), Pam Hawley (Registrar’s Office)

1. Add advisor information to the advising profile.
2. Overall, advisors like the fact that when a student graduates or discontinues, they no longer show up in the “my advisee” list. However, some advisors would like a separate view available that shows a list of their inactive assigned advisees. This would allow them to easily access information for those former students when they are doing letters of recommendation for grad school/employment or readmit/reinstate advising.
3. When advisors choose a student from their “my advisee” list, they can easily get to his/her information. However, to get back into their list to choose another student they must re-navigate back to the “my advisee” link. They would like their “my advisee” list to remain open in a separate window (in the same way that the main page of the advising center remains open in a separate window when you click on a link or links).
4. Advising coordinators need a REX report that provides a list of all active students in their plan and (by term) displays name of assigned advisor (or blank if none assigned), whether or not student has been cleared for registration, number of earned credits and cum GPA. Melanie indicated that a similar report has already been developed for her so perhaps this report could just be adjusted to be searchable by plan and exclude some of the information Visual Arts requires (milestones) that is not necessary for other departments. This report will be used to evaluate and update advisor assignments.
5. Advising coordinators need a REX report that provides a list of all active students who are assigned an advisor in their department but who no longer in their major/minor/cert. This report can be used to inactivate advisor assignments that are no longer relevant.
6. Under our current business practice, if a department wishes to inactivate advisor info because a student is no longer in the major, the only way to do so if the student is not being assigned to an advisor in another department (because their new major does not use the functionality) is to delete the advisor info altogether and lose the historical data. Pam’s preliminary testing has shown that a committee can be created with no member assigned and then be used to update the student’s advisor record. When a student with this “blank committee” views advisor information in self service, they are directed to the same page as students who have no advisor info. This is a promising option but requires some additional testing before being recommended as a business practice.
7. Those responsible for maintaining advisor information would like a way to batch upload or batch enter data. Options include being able to use an Excel spreadsheet to enter and then upload advisor data or a “batch entry” bolt-on page that would allow assignment of one advisor to multiple student IDs/assignment of multiple student/advisor relationships from one page. In cases where a student already has other advisor assignments due to multiple majors/minors/certs, this process would need to carry over previously assigned data into the newly inserted rows.
8. Those responsible for maintaining advisor information would like a batch process for removal of advisor information when students are no longer in a major/minor/certificate for which they have been assigned an advisor. This process needs to either insert a new row with generic information (if advisor to be removed was the only advisor assigned) or insert a row that removes the advisor data for the inactive plan but carries over other advisor data.
9. There is potentially a desire to populate all student records with no assigned advisor with advising coordinator info. This requires further discussion with those departments not currently using the functionality. Right now, they do not have to do any maintenance if a student leaves their program. If this data was pre-populated, maintenance would be required. It was generally agreed that development of batch inactivation processes would need to be in place before this initiative could move forward.