Entering Student Advisors

June 2019

- Log on to PeopleSoft
- Click the Records & Enrollment tile



Click the top dropdown menu to see other options in Records & Enrollment

	▼ Records and Enrollment
Student Services Center	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	
▼ Search Criteria	
D begins with v	
Campus ID begins with v	
First Name begins with v	
Case Sensitive	



Select Student Advisor

Homepage	Records and Enrollment
Services Center formation you have and click Search. Leave fields blank for a list of all values.	Records and Enrollment
Intesting Value	🔅 Student Services Ctr (Student)
Criteria	Enrollment Request
begins with v	Enrollment Request Search
begins with v	Enrollment Summary
native	Request Transcript Report
Clear Base Search 🖉 Save Search Onterna	Student Advisor
	T Student Program/Plan
	Manage Service Indicators
	T Student Grades
	Add/Update a Person
	E Student Milestanee

Enter the student ID of the individual who needs an advisor and click Search Student Advisor

Enter any information you have and click Search. Leave fields blank for a list of all values.

 Search Criteria 		
ID begins with \sim		
Campus ID begins with ${\scriptstyle\checkmark}$		
lational ID begins with ~		
ast Name begins with v		
First Name begins with 🗸		
Include History	orrect History 🗌 Case Sensiti	ve

<u>To enter a single advisor for the first time</u>, enter the following fields:

Academic Career = GRAD Academic Program = the department they are joining Academic Plan = *DO NOT ENTER ANYTHING HERE – LEAVE BLANK* Academic Advisor = CGU faculty member/staff's ID. Save

Student Advisor

If you don't know the ID of the advisor, click the magnifying glass, then enter the information you do know to find the person and click search. When you see the person you are looking for click Select. If you search for the faculty or staff member but cannot see them, contact the Registrar's Office for assistance.

					0		
					Find View All	First 🕚 1 of 1	Last
*Academic Institution	CGRAD	Q	Claremont Gra	duate University			+ -
*Effective Date	06/10/2019	31					
					Find View All	First 🕚 1 of 1	Last
*Advisor Role	Advisor		~	*Advisor	Number 1		+ -
*Academic Career	GRAD	Q	Graduate				
*Academic Program	IS	Q	Info. Systems	& Technology			
Academic Plan	1	Q					
Academic Advisor		Q	Olfman,Lorne				
Advisor Percentage	•						
Committee							
	Advised by Co	mmit	tee	Must Approv	e Enrollment		
	Must Approve	Grad	luation	Graduation A	pproved		
Return to Sear	ch 📑 Notify		Ji Z	Update/Display	Jinclude Histor	y 🛛 🞲 Correct I	History

• <u>To enter multiple advisors during the first entry</u>, click on the plus button (\square) in the *lower* box to add a new row and repeat the process with the second advisor – click Save after both are entered:

Academic Career = GRAD Academic Program = the department they are joining Academic Plan = DO NOT ENTER ANYTHING HERE – LEAVE BLANK

Academic Advisor = CGU faculty member/staff's ID. Save (After both rows are entered)

					Find View All	First	۲	1 of 1	
*Academic Institution	CGRAD	Q	Claremont Gra	duate University					
"Effective Date	06/10/2019	H							
					Find View All	First	1	1 of 1	6
"Advisor Role	Advisor		v	*Advisor N	umber 1				E
*Academic Career	GRAD	Q	Graduate						
Academic Program	IS	Q	Info. Systems	& Technology					
Academic Plan		Q							
Academic Advisor		Q	Olfman,Lorne						
Advisor Percentage									
Committee									
	Advised by	Commit	ttee	Must Approve	Enrollment				
	Must Appro	ve Gra	duation	Graduation Ap	proved				

• <u>To update an advisor previously entered</u>, click on the plus button () in the *top* box to add a new effective-dated row and add new, current information. *Do not delete anything*. Enter the same information as above.

Academic Career = GRAD Academic Program = the department they are joining Academic Plan = *DO NOT ENTER ANYTHING HERE – LEAVE BLANK* Academic Advisor = CGU faculty member/staff's ID.

					Find	View All	First	1 1 0	11 (8
"Academic Institution	CGRAD	Q	Claremont Gradu	uate University					
"Effective Date	06/10/2019	B							
					Find	View All	First	1 1 of	1 0
"Advisor Role	Advisor		Ŷ	*Advisor	Number	1			+
*Academic Career	GRAD	Q	Graduate						
*Academic Program	IS	Q	Info. Systems &	Technology					
Academic Plan		Q		0.1100.0514					
Academic Advisor		Q	Olfman,Lorne						
Advisor Percentage									
Committee									
	Advised by C	ommit	tee D	Must Approv	e Enrollm	ent			
	Must Approv	e Grad	luation	Graduation A	pproved				

- Faculty can view a list of advisees in their Faculty Center (Advisor Center tab > My Advisees)
- Helpful Queries: SR_ACAD_ADVISORS (Current students by advisor) SR_STDNTS_WITHOUT_ADVISORS (students w/o advisors) SR_STDNTS_PER_ADVISORS (Advisors by program and term)