

Office of Student Systems Services

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5/30/2017

Advisor Maintenance Batch Upload

This document outlines how to create a batch file of Student Advisor updates from a spreadsheet that can then be uploaded and processed into Banner.

Use [Student_Advisor_Batch_Load.xlsx](#) spreadsheet

Get a list of students – UIN Last Name and First Name **NOTE: no middle initial and name must be exact spelling as in Banner**

Open **Student_Advisor_Batch_Load.xlsx** and enter data into the appropriate fields

Create list of Advisors – It is suggested that you create list of Advisors. This will allow you to copy/paste the info into the spreadsheet without chance of making an error. Fields needed - UIN, Last Name, and First Name **NOTE: no middle initial and names must be exact spelling as in Banner**

Spreadsheet fields:

STUDENT_UIN - required

STUDENT_LAST_NAME – required - exact spelling as in Banner (60 chars max)

STUDENT_FIRST_NAME – required - exact spelling as in Banner (15 chars max)

ACTION_CODE - required – **A** – Add new advisor, **E** – End term for advisor, **D** – Delete entire advisor range or decrease existing range

ADVISOR_UIN - required

ADVISOR_LAST_NAME – required - exact spelling as in Banner (60 chars max)

ADVISOR_FIRST_NAME – required - exact spelling as in Banner (15 chars max)

PRIMARY_INDICATOR – optional - **Y** or **N**, NOTE: If field left blank and there is no current Primary Advisor, the record being loaded will be marked as the Primary Advisor.

FROM_TERM – optional - 6 chars, e.g. - 220178 - effective term of Advisor (NOTE: if field left blank, earliest General Student (SGASTDN) term will be used)

TO_TERM – optional - 6 chars, e.g. - 220178 - end term for advisor (NOTE: if field left blank, campus end term 299999 will be used)

ADVISOR_TYPE – optional, but use for Add records only – (4 chars max)

From / To Term Rules based on Action Code

ADD Action

This action will create a new Student Advisor Range or expand an existing range.

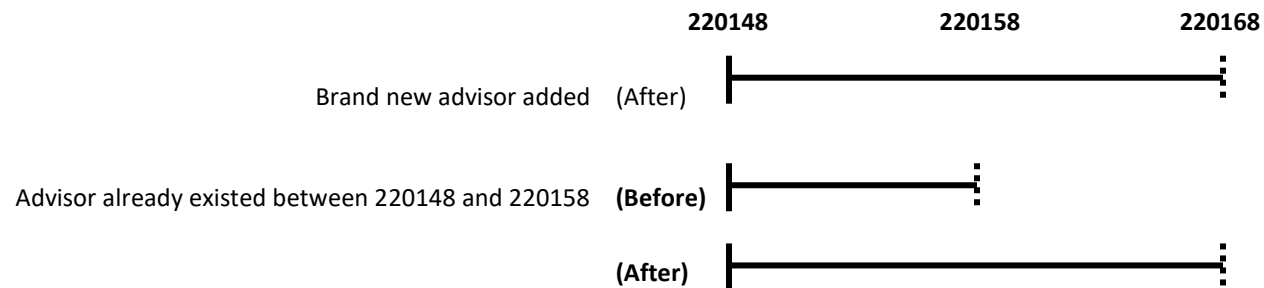
FROM_TERM. 6 bytes. This field defines the effective term associated with the advisor. Example: 220148.

If the FROM Term is left blank, then the Students Minimum Effective Term from SGASTDN will be used.

TO_TERM. 6 bytes. This field defines the term when the advisor is no longer effective. Example: 220168.

If the TO Term is left blank, then the Campus End of Term (e.g. 299999) will be used.

This example would make the advisor effective starting in 220148 and expire BEFORE 220168



DELETE Action

This action will remove an entire Student Advisor Range or decrease an existing range.

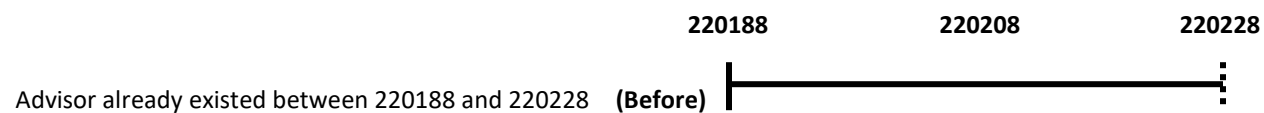
FROM_TERM. 6 bytes. This field defines the effective term associated with the advisor. Example: 220188.

If the FROM Term is left blank, then the Students Minimum Effective Term from SGASTDN will be used.

TO_TERM. 6 bytes. This field defines the term when the advisor is no longer effective. Example: 220208.

If the TO Term is left blank, then the Campus End of Term (e.g. 299999) will be used.

This example would remove the advisor range starting in 220188 and expire BEFORE 220208. If the Advisor's ending range was after 220208, then the advisor would still be effective from 220208 until the original end term.



(After)



END Action

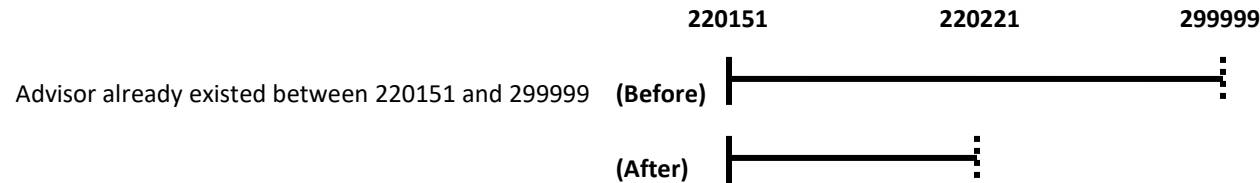
This action will end an existing Student Advisor range.

FROM_TERM. Leave this field Blank.

TO_TERM. 6 bytes. This field defines the term when the advisor is no longer effective. Example: 220221.

If the TO Term is left blank, then the entire Student Advisor Range will be removed.

This example would remove the advisor range starting in 220221 through 299999.



Enter data into spreadsheet - Examples

Add Advisor to new student

End Term not required (if blank, will default to 299999)

UIN	Student Last Name	Student First Name	Action Code	Advisor UIN	Advisor Last Name	Advisor First Name	Primary Indicator	From Term	End Term	Advisor Type
666555444	Smith	William	A	123456789	Johnson	Thomas	Y	220178		COLL
666444333	Jones	Michael	A	999888777	Peters	Wendy	Y	220171		COLL

From Term is required (if blank, earliest SGASTDN Effective Term is used)

Change a student's Advisor

NOTE: If changing from one advisor to another, 2 entries are required – **End the old Advisor and add the new Advisor**

UIN	Student Last Name	Student First Name	Action Code	Advisor UIN	Advisor Last Name	Advisor First Name	Primary Indicator	From Term	End Term	Advisor Type
666222111	Nelson	Sarah	E	987654321	Spence	Steven			220178	COLL
666222111	Nelson	Sarah	A	123456789	Johnson	Thomas	Y	220178		COLL

End old Advisor and Add new Advisor

Delete an Advisor – this removes a specific term range or the entire advisor record for the student (Note – use the End/Add action if changing advisors)

UIN	Student Last Name	Student First Name	Action Code	Advisor UIN	Advisor Last Name	Advisor First Name	Primary Indicator	From Term	End Term	Advisor Type
666333999	Price	Nancy	D	999555333	James	Peter		220158	220171	
666111555	Davis	Michael	D	999555334	James	Peter		220168		

Removes Advisor record for term range or entire record

Create the batch file - Complete the spreadsheet and copy the contents of **column L** into a text editor and save as a **.dat** file type.

	I	J	K	L
Advisor			Advisor	
From Term			Type	File Structure - copy contents into text editor
		220178	COLL	666222111 Nelson Sarah E 987654321 Spence Steven 220178 COLL
	220178		COLL	666222111 Nelson Sarah A 123456789 Johnson Thomas Y 220178 COLL
	220178		COLL	666555444 Smith William A 123456789 Johnson Thomas Y 220178 COLL
	220171		COLL	666444333 Jones Michael A 999888777 Peters Wendy Y 220171 COLL
	220158	220171		666333999 Price Nancy D 999555333 James Peter 220158 220171
	220168			666111555 Davis Michael D 999555334 James Peter 220168

Copy contents of column L into a text editor, e.g. Notepad, etc.

Your text file should look like this:

```
200_LAS_student_advisor_20170612_1.dat - Notepad
File Edit Format View Help
666222111|Nelson|Sarah|E|987654321|Spence|Steven|||220178|COLL
666222111|Nelson|Sarah|A|123456789|Johnson|Thomas|Y|220178||COLL
666555444|Smith|William|A|123456789|Johnson|Thomas|Y|220178||COLL
666444333|Jones|Michael|A|999888777|Peters|Wendy|Y|220171||COLL
666333999|Price|Nancy|D|999555333|James|Peter|||220158|220171|
666111555|Davis|Michael|D|999555334|James|Peter|||220168||
```

Save the file to the following naming convention:

campus – 200 + **Dept/College identifier** (3-4 characters) + **student_advisor** (constant for all file names) + **date** (YYYYMMDD) + **file number** (in case of multiple files submitted same day) + **.dat** **NOTE:** Must be saved as a **.dat** file

Example of file name: 200_LAS_student_advisor_20170612_1.dat

Email the file

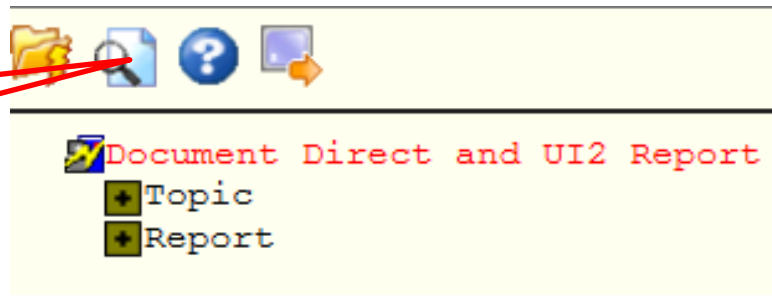
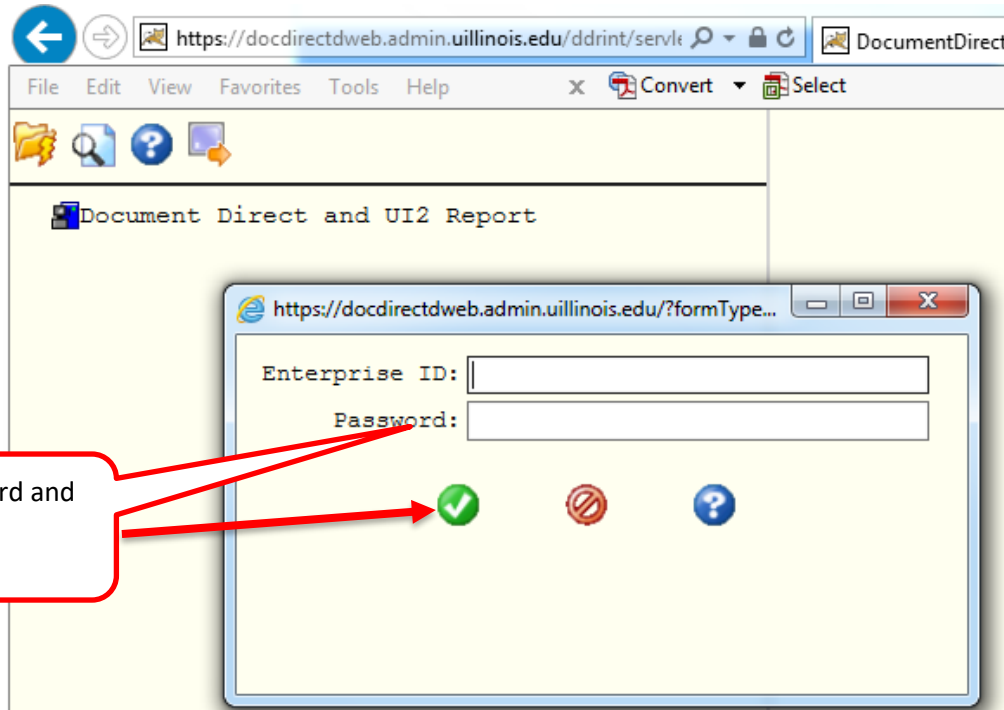
Email the file to Dave Elsen in Academic Enrollment Services (AES) at delsen@uic.edu

Dave will review the file and submit it for processing.

View Reports (Document Direct)

Review updates and correct any errors.

Log into Document Direct with Enterprise ID/Password to view reports - <https://docdirectweb.admin.uillinois.edu/ddrint/servlet/ddrintee>



Report ID's: Enter the Report ID. Enter the Section ID to filter the results. Click the Search button.

1. SG2SAMB01I - UIC SAMB Student Advisor Maintenance - Control Totals
2. SG2SAMB02I - UIC SAMB Student Advisor Maintenance - Error Log
3. SG2SAMB03I - UIC SAMB Student Advisor Maintenance - Activity Detail

Document server: Document Direct and UI2 Report

Report ID: sga2samb

Version ID:
(M/D/YY H:MM:SS A) (Example: 5/24/17 9:52:51 AM)

Section ID: oar

Page: 1

Type sga2samb – this will return all advisor reports. Include Section ID – OAR, LAS, etc. to filter to only those reports. Click the Search button.