

Advisor Tools-Advisee Roster

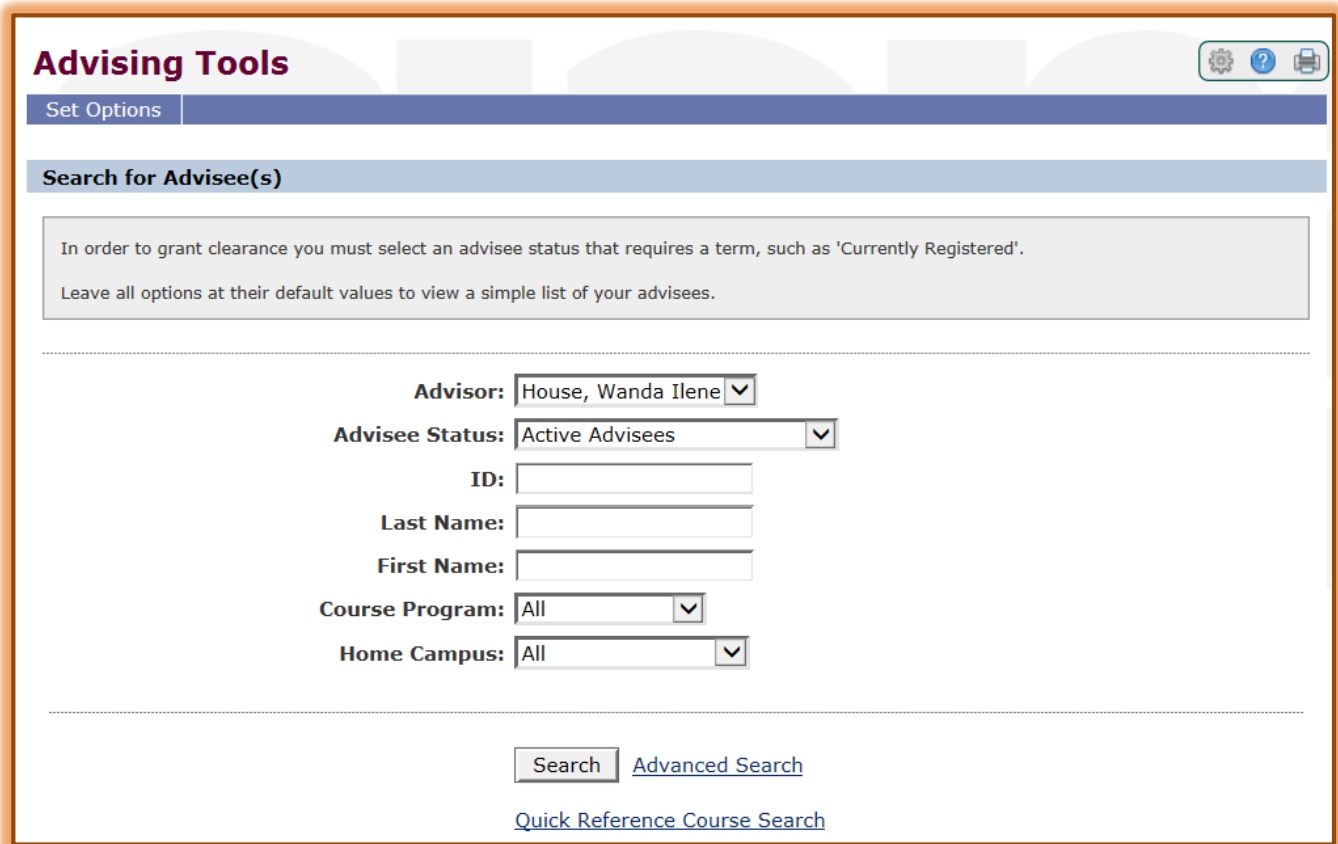
Advisee Roster

This area is used to search for an advisee. There are several different search options available. This section of the document will explain each of these options.

- ✦ Log into **My Siena**.
- ✦ Click the **Advisee Roster** link in the **Advising Tools** category under **My Tools** (see illustration below).



- ✦ The **Advisee Roster** page will display (see illustration below).

A screenshot of the "Advising Tools" web application. The page has a header "Advising Tools" with a "Set Options" button. Below the header is a "Search for Advisee(s)" section. A grey box contains instructions: "In order to grant clearance you must select an advisee status that requires a term, such as 'Currently Registered'. Leave all options at their default values to view a simple list of your advisees." Below this are several search filters: "Advisor:" (dropdown menu showing "House, Wanda Ilene"), "Advisee Status:" (dropdown menu showing "Active Advisees"), "ID:" (text input), "Last Name:" (text input), "First Name:" (text input), "Course Program:" (dropdown menu showing "All"), and "Home Campus:" (dropdown menu showing "All"). At the bottom, there are three search buttons: "Search", "Advanced Search", and "Quick Reference Course Search".

Search for Advisee by Advisee Status

- ✦ Click the **Advisor** list arrow to search your **Advisee List** or to search **All Advisees**.
- ✦ Click the **Advisee Status** list arrow (see illustration above).
- ✦ The list of options as described in the table below will appear.

Advisee Status	Description
Active Advisees	Students who have been active at the University within the past two years.
Currently Registered	Students who are registered for the selected semester.
Inactive Advisees	Students who have not been active at the University within the past two years, or who are suspended. Opposite of Active Advisee.

Advisee Status	Description
Need Registration Clearance	All Active Advisees who do not have registration clearance for the selected semester.
New Students	Students who were admitted within one year of the start of the selected semester.
Not Yet Registered	All Active Advisees who have not registered for the selected semester.
All	All students who are registered at the University.

✚ After all the options have been specified, click the **Search** button.

Search for Advisee by ID

- ✚ In the **Advisee Roster** portlet (see illustration on previous page), click in the **ID** box.
- ✚ Input the **ID Number** for the student.
- ✚ Click the **Search** button.

NOTE: If you put an ID number in on this screen, the search will ignore the Advisee Status, Program, and Home Campus, and Scope of Search that you have selected and just pull that person from the database.

Search for Advisee by Last Name and/or First Name.

- ✚ In the **Advisee Roster** portlet (see illustration on previous page), input the name of the student.
- ✚ You can use the Last Name, the First Name, or a combination of both.
- ✚ Click the **Search** button.

Search for Advisee by Campus, Program, or Advisee Status

- ✚ **Course Program**
 - ★ The program the student is enrolled in.
 - ★ The options are **Graduate** and **Undergraduate**.
- ✚ **Home Campus**
 - ★ The campus a student is advised at.
 - ★ This is **not necessarily** the campus they are taking courses at.

Advanced Search

To apply more criteria to the search, use this option.

- ✚ Click the **Advanced Search** button in the **Advisee Roster** window.
- ✚ The **Advanced Search** window will display (see illustration on next page).
- ✚ To search by **Degree, Major, City, State, or Home Campus:**
 - ★ Click the appropriate list arrow.
 - ★ Select the desired option from the list.
 - ★ Click the **Search** button.
- ✚ To search by **Last Name, First Name, or Middle Name:**
 - ★ Select one of the options in the list box next to the name you are searching by. These options are:
 - ★ **Contains** – When this option is selected, the database will be searched for any name that contains the specified text.
 - ★ **Exact Match** – This option means that the search will look for the name in the database that matches the text exactly.
 - ★ **Begins With** – With this option, the program would list any names in the database that begin with the specified text.
 - ★ Input the name into the textbox.
 - ★ Click the **Search** button.
- ✚ Use the **Name Search Options** to specify additional conditions for the search.

- ★ **Use Phonetic Match** – When this option is selected, the database will be searched for any name that sounds the way the name is spelled.
- ★ **Use Primary Name Source** – This option is used to search the database for the primary name that is listed in the database.
- ★ **Use Alternate Name Source** – Some students have an alternate name, one they have used previously. This option will search the database for that name if it is used in the search criteria.

Advising Tools

Set Options

[Advisee Roster](#) > Advanced Search

Advanced Search Criteria

In order to grant clearance you must select an advisee status that requires a term, such as 'Currently Registered'.

Leave all options at their default values to view a simple list of your advisees.

Advisor:

Advisee Status:

ID:

Course Program:

Degree:

Major:

City:

State:

Home Campus:

Advisee Last Name:	<input type="text" value="Contains"/>	<input type="text"/>	Name Search Options <input type="checkbox"/> Use Phonetic Match <input checked="" type="checkbox"/> Use Primary Name Source <input type="checkbox"/> Use Alternate Name Source
Advisee First Name:	<input type="text" value="Contains"/>	<input type="text"/>	
Advisee Middle Name:	<input type="text" value="Contains"/>	<input type="text"/>	

Quick Reference Course Search

This area is used to quickly search courses by term, program, and campus.

- ✦ Click on the **Quick Reference Course Search** link to display a popup window that contains a list of all courses at a particular location.
- ✦ The **Quick Reference** page will display in a new window (see illustration on next page).
- ✦ In the **Term** list, select the term which is to be searched, such as Fall 2015.
- ✦ Select either **Undergraduate** or **Graduate** from the **Program** list.
- ✦ In the **Campus** list, select the appropriate campus.
- ✦ Click the **Search** button to execute the search.

- ★ A list of classes should appear in the window.
- ★ This list can be referenced while you are working with a student.

Term: Program: Campus: