

USD BLISS-230

WS1 Advisor Dashboard



Overview:

This workshop activity will allow you to become familiar with the Advisor Dashboard channel in USD's My San Diego Portal. The Advisor Dashboard is a channel which allows you to search and display students that are assigned to you as an Advisee.

The workshop will walk you through using the various functions in this dashboard. Remember that for each of the functions in the dashboard there are selections from the Banner Self-Service channel which point to the same pages.

The Banner Channels are only for use students assigned as advisees starting with the Fall 2008 term. All prior terms are accessed using the existing legacy channels currently active in the portal.

Special Instructions:

For this workshop we will be using the Development version of the portal. The tab used in this instance will be labeled 'Faculty SSB'. In the production version which you will be using these channels will be available (and preloaded) starting on April 24, 2008.

While real students have been loaded as advisees, all student data in this instance are only provided as examples and are not reflective of actual assignments .


Remember that any changes you make to appearance in the Development system will not be carried over into production.

Activity 1 – Using the Search function in the Advisor Dashboard:

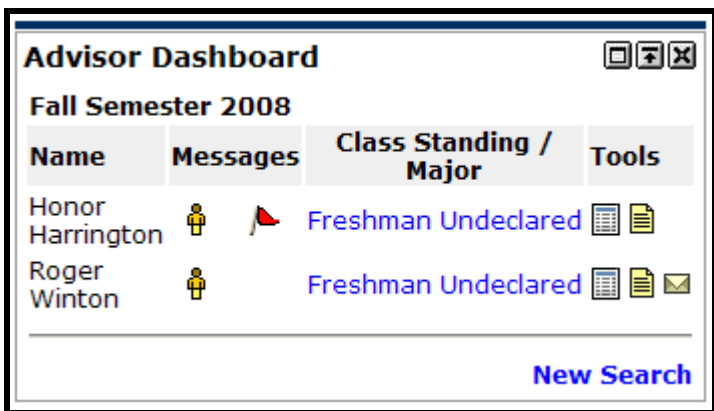
Step	Action	Results
1	Open an Internet Browser window	The home page for the browser will be displayed.
2	Click into the Address bar and type the following URL: http://mydev.sandiego.edu (Note this is the Development instance, you will need to use: http://my.sandiego.edu For the production system).	Developer Instance of the Portal opens and the basic registration channels appear in the 'Faculty SSB' tab. Note, your channels will be defaulted into the 'Teach/Advise' tab in the production system.

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Step	Action	Results
3	Click on the dropdown icon  and select the term (for this class use Fall Semester2008)	Banner displays the term in the dropdown box
4	Enter a Student ID, Student Name, or part of a name, or '%' in the Last name field to see all of your assigned Advisees.	Banner displays the students in the Advisor Dashboard.

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The icon will display the Current Student Schedule

If the icon is displayed then the student has active holds. Clicking on this icon will display the View Hold page.

The Class Standing Link will link to DARS in the production release.

The Major link will display the General Student Information page (program of study).

The link will allow you to request a online transcript for the student.

The link will display any test scores (SAT, Math Placement, etc.) which have been loaded into Fanner for the student.

If the icon is present you may use this to send an E-mail

Activity 2 – Releasing an Advising Hold:

Step	Action	Results
1	For one of the students with an Hold flag displaying, click on the Hold Icon in the Advising Dashboard	Banner displays the 'View Holds Page for the student.

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View Holds

008095398 Jubal Harshaw
Mar 10, 2008 12:37 pm

Information for [Honor Harrington](#)

Please note that some holds are sensitive and may not display.

Administrative Holds

Hold Type	From Date	To Date	Amount	Reason	Originator	Processes Affected
Advisor Hold	Feb 29, 2008	Dec 30, 2099		See Advisor to Release		Registration

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[[ID Selection](#) | [Term Selection](#) | [Remove Advisor Holds](#)]

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Step	Action	Results
2	<p>Review the hold(s) You may only release the Advisor Hold for a student. Click on the 'Remove Advisor Hold' link at the bottom of the page.</p> <p>If other holds exist please refer the student to the appropriate office to discuss what needs to be done to release any other holds.</p>	Banner displays the 'Remove Advisor Holds' page.

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Remove Advisor Holds

008095398 Jubal Harshaw
Mar 10, 2008 12:38 pm

Information for [Honor Harrington](#)

Administrative Holds

Remove?	Hold Type	From Date	To Date	Amount	Reason	Originator	Processes Affected
End Hold	Advisor Hold	Feb 29, 2008	Dec 30, 2099		See Advisor to Release		Registration

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Step	Action	Results
3	To release the hold click on the 'End Hold link. If you decide not to release the hold use the 'Return to Previous' link.	Banner displays the 'View Holds' page. Note that the Advisor Hold has been removed and if this is the only Registration hold the student is now eligible to register during their time ticketing assignment.

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Personal Information Faculty Services

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008095398 Jubal Harshaw
Mar 10, 2008 12:38 pm

View Holds

Information for [Honor Harrington](#)

Please note that some holds are sensitive and may not display.

No holds exist.

[Return to Previous](#)

[ID Selection | Term Selection | Remove Advisor Holds]

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Summary:

The process to release an Advisor hold is simple and can be done either using the dashboard or through the Self-Service Menus.