

ADVISEE LIST (SINGLE OR MULTIPLE) PLUS ADVISING HOLDS


The results of this query will show you the name of the advisor(s) and, for each student, you will see the advisor role, ID, name, any existing advising hold, email, academic program, academic plan, the term you select and the student's academic level and enrollment status in that term. It is possible to encounter duplicated rows in your results if a student has more than one advisor or more than one advising hold.

After successfully logging in, you will come to a primarily blank page with **Advisee List Results** showing in the upper left hand corner.

1. Click the [Process]¹ button to start the query process. On your screen, you next will see two Advisee List Query limits (Term Code and Advisor ID) that will require values to be entered by you in order for the query to work. The term code will be added first.
 - **IMPORTANT NOTE 1** – The “**Include Nulls**” and “**Not**” check boxes should remain unchecked for both limits. The “**= Equal**” value in the operator select list should remain unchanged.
 - **IMPORTANT NOTE 2** – The “**Ignore Limit**” button should **NOT** be clicked.
2. **Modify Limit: Term Code** section
 - Enter the term code in the box next to the [Add] button then click [Add]. Alternatively, you can click the **Show Values** button and, after a few moments, all possible term code values will appear and you can make your selection from the Available Value select list. Do NOT use the **Custom SQL** option.
 - i. I do not recommend using more than one term code because you will get duplications of all student records.
 - ii. Do not use a code for a term that has already ended.
 - When your term code limit has been selected from the select list, click the [Set Limit] button and you will proceed to the next limit.²
3. **Modify Limit: Advisor ID** section
 - Enter the Emplid for the advisor(s) in the box next to the [Add] button, then click [Add]. If you want multiple advisors included in your results, you have three options:
 - i. Repeat the above step over and over until all Emplid values are shown and highlighted in the Custom Value select list.
 - ii. Type each Emplid separated by a comma but no spaces before clicking the [Add] button. (Example: 1103993,1184994,1599323)
 - iii. Click the **Show Values** button and, after a few moments, all the possible Emplid values will appear and you can make your selection(s) from the Available Values select list. Do not use the **Custom SQL** option.
 - When the advisor has (or advisors have) been highlighted in the select list using any of the three methods, click the [Set Limit] button to process the query.
4. The advisee list results will appear after a short processing time. If the results are what you expected, you can download the results to your computer by clicking on the [Export to XLS]³ button. However, if the results are NOT what you expected, there may have been an error in the limit values you set. Simply click the *Process* button again to start over. The limit values previously entered (if any) will remain as options *if* you did not close the browser window.
5. EXPORT⁴ – A file download window will appear asking you to open, save or cancel.
 - Clicking **Save** will open a *Save As* window and you can name the file and store it in on your computer in whichever folder you prefer. When the download is complete, you will be asked to open the file, open the folder which contains your file or simply close this download box.
 - Clicking **Open** might give you a prompt that your results file is in a different format than specified by the file extension. This usually happens if you use Excel 2007 rather than Excel 2003 or earlier. Click the [Yes] button.
 - Clicking **Cancel** will prevent the download from happening.

¹ This is the [Process] button: 

² You may need to scroll down to see this button – depending on your screen's size and resolution.

³ This is the [Export to XLS] button: 

⁴ Depending on your browser settings and the version of Excel on your computer, these instructions might not match what you see on your screen.