

# The University of New Orleans

Web-STAR (PeopleSoft Learning Solutions v 9.0):

## Advanced Advisor Training Manual



THE UNIVERSITY *of*  
NEW ORLEANS



# Advanced Advisor

Welcome to the **Advanced Advisor** module! This module contains the information and tools needed to learn the common task an Advanced Advisor performs while working with students.

**Goal** To have the skills and knowledge to Advise Students

**Participate Objectives** at the end of this module, you will be able to.....

1. Enrollment Request Search
2. Program/Plan
3. Term Activation/Increase student unit load

**If you have any questions about this document please contact the Training group at 504-280-5645 or visit us at UCC-101Q.**

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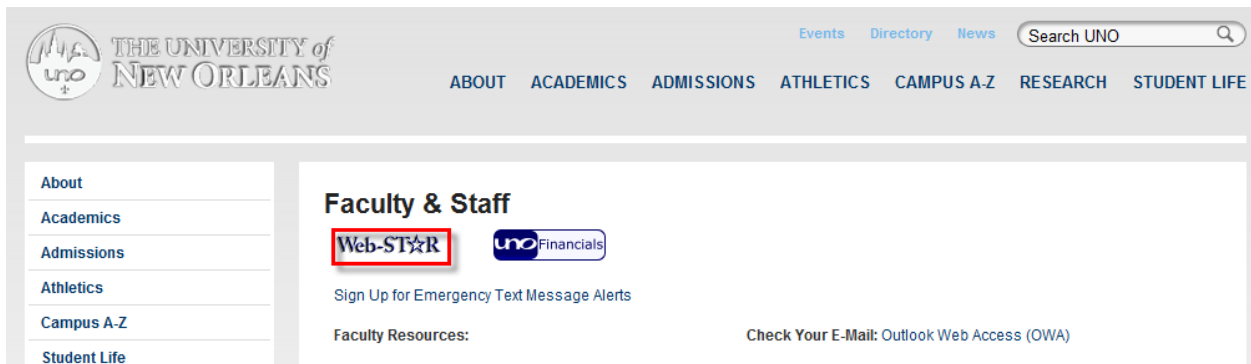
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### Navigation to Web-STAR

<b>Step 1.</b>	Navigate to the UNO Home Page: <a href="http://www.uno.edu/">http://www.uno.edu/</a>
<b>Step 2.</b>	Select the <b>Faculty &amp; Staff</b> link.



<b>Step 3.</b>	Select the <b>Web-STAR</b> logo.
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**Step 4.** Select the Faculty/Staff link.



**Step 5.** Enter your UNO **username** and **password**. **Note:** Your user name is the same password used to login to your email, computer or blackboard course.

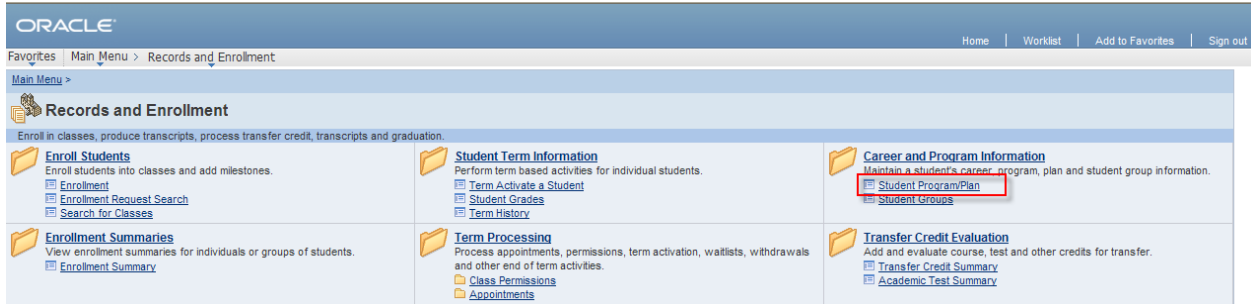
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<p>User ID: <input type="text"/></p> <p>Password: <input type="password"/></p> <p><input type="button" value="Sign In"/></p> <p><a href="#">Set Trace Flags</a></p>	<p><b>Select a Language:</b></p> <table border="0"> <tr> <td><a href="#">English</a></td> <td><a href="#">Español</a></td> </tr> <tr> <td><a href="#">Dansk</a></td> <td><a href="#">Deutsch</a></td> </tr> <tr> <td><a href="#">Français</a></td> <td><a href="#">Français du Canada</a></td> </tr> <tr> <td><a href="#">Italiano</a></td> <td><a href="#">Magyar</a></td> </tr> <tr> <td><a href="#">Nederlands</a></td> <td><a href="#">Norsk</a></td> </tr> <tr> <td><a href="#">Polski</a></td> <td><a href="#">Português</a></td> </tr> <tr> <td><a href="#">Suomi</a></td> <td><a href="#">Svenska</a></td> </tr> <tr> <td><a href="#">Čeština</a></td> <td><a href="#">日本語</a></td> </tr> <tr> <td><a href="#">한국어</a></td> <td><a href="#">Русский</a></td> </tr> <tr> <td><a href="#">ไทย</a></td> <td><a href="#">简体中文</a></td> </tr> <tr> <td><a href="#">繁體中文</a></td> <td><a href="#">العربية</a></td> </tr> <tr> <td><a href="#">UK English</a></td> <td></td> </tr> </table>	<a href="#">English</a>	<a href="#">Español</a>	<a href="#">Dansk</a>	<a href="#">Deutsch</a>	<a href="#">Français</a>	<a href="#">Français du Canada</a>	<a href="#">Italiano</a>	<a href="#">Magyar</a>	<a href="#">Nederlands</a>	<a href="#">Norsk</a>	<a href="#">Polski</a>	<a href="#">Português</a>	<a href="#">Suomi</a>	<a href="#">Svenska</a>	<a href="#">Čeština</a>	<a href="#">日本語</a>	<a href="#">한국어</a>	<a href="#">Русский</a>	<a href="#">ไทย</a>	<a href="#">简体中文</a>	<a href="#">繁體中文</a>	<a href="#">العربية</a>	<a href="#">UK English</a>	
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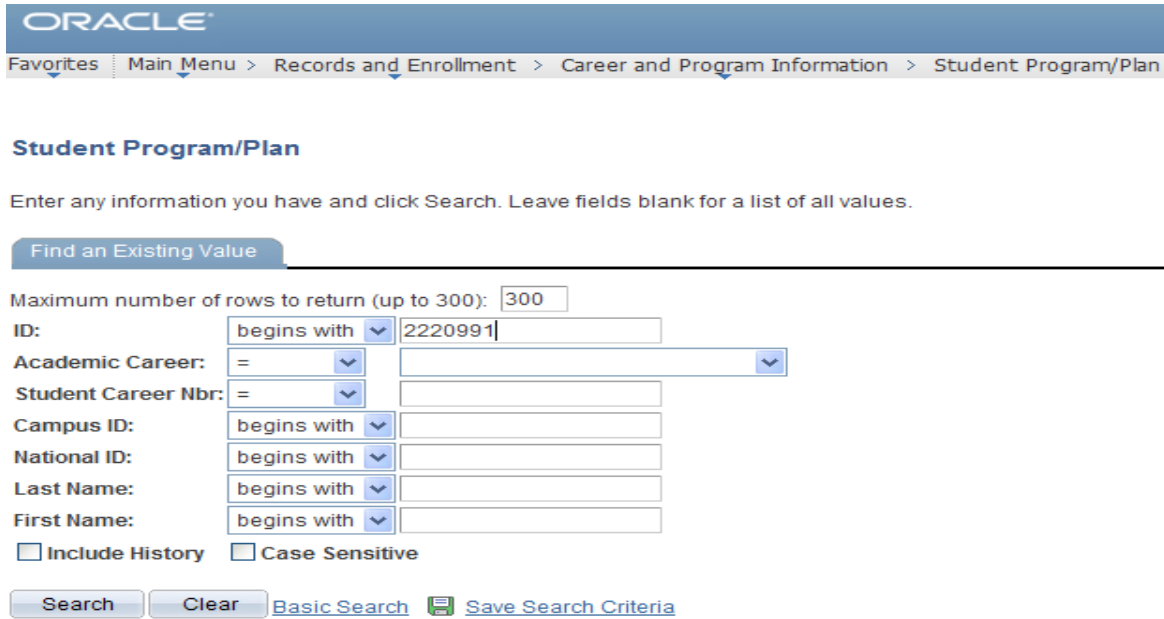
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## Add a New Plan to Student Record

<b>Step 1.</b>	<b>Navigation:</b> Records and Enrollment, Career and Program Information, Student Program/Plan.
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<b>Step 2.</b>	Enter the <b>Students ID</b> number.
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<b>Step 3.</b>	Select the Program you desire to change.
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Search Results

ID	Academic Career	Student Career Nbr	Program Short Descr	Institution Short Descr	Name	Gender	Date of Birth	Campus ID
2220991	Non Credit	0	NonCredit	UNO	Gator, Ali Test Student	Male	10/12	(blank)
2220991	Graduate	0	Bus Admn M	UNO	Gator, Ali Test Student	Male	10/12	(blank)
2220991	Graduate	0	Educ M	UNO	Gator, Ali Test Student	Male	10/12	(blank)
2220991	Graduate	0	Educ M Oth	UNO	Gator, Ali Test Student	Male	10/12	(blank)
2220991	Graduate	0	Grad Other	UNO	Gator, Ali Test Student	Male	10/12	(blank)
2220991	Undergrad	0	Educ U	UNO	Gator, Ali Test Student	Male	10/12	(blank)
2220991	Undergrad	0	GStudies U	UNO	Gator, Ali Test Student	Male	10/12	(blank)
2220991	Undergrad	0	Lib Arts U	UNO	Gator, Ali Test Student	Male	10/12	(blank)
2220991	Undergrad	0	Sciences U	UNO	Gator, Ali Test Student	Male	10/12	(blank)

**Step 4.** Click on the plus sign to add a new row.

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Favorites | Main Menu > Records and Enrollment > Career and Program Information > Student Program/Plan

Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees

Ali Gator 2220991

Academic Career: Graduate [Career Requirement Term](#) Student Career Nbr: 0

Status: Active in Program

\*Effective Date: 08/22/2010

\*Program Action: DATA Data Change Effective Sequence: 1

Action Reason: DEGR Filed Degree Application Action Date: 06/22/2010

\*Academic Institution: UNOLA University of New Orleans Joint Prog Appr:

\*Academic Program: MEDUC Education Masters

\*Admit Term: 0980 2010 Fall

Requirement Term: 0980 2010 Fall

Expected Grad Term: 0980 2010 Fall \*Campus: MAIN Main \*Acad Load: Full-Time

Admissions

From Application

Application Nbr: 0

Application Program Nbr: 0

Save Return to Search Previous in List Next in List Refresh Update/Display Include History

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Attributes](#) | [Student Degrees](#)

**Step 5.** The Effective Date will default in with the current date. The date MUST be on or before the first of the term in which the plan is to be active for that student.

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ORACLE®

Favorites | Main Menu > Records and Enrollment > Career and Program Information > Student Program/Plan

Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees

Ali Gator 2220991

Academic Career: Graduate Career Requirement Term Student Career Nbr: 0

Find | View All First 1 of 2 Last

Status: Active in Program

\*Effective Date: 08/22/2010

Effective Sequence: 2

\*Program Action:

Action Date: 06/22/2010

Action Reason:

Joint Prog Appr:

\*Academic Institution: UNOLA University of New Orleans

\*Academic Program: MEDUC Education Masters

\*Admit Term: 0980 2010 Fall

Requirement Term: 0980 2010 Fall

Expected Grad Term: 0980 2010 Fall \*Campus: MAIN Main \*Acad Load: Full-Time

**Admissions**

From Application  
Application Nbr:  
Application Program Nbr: 0

Save Return to Search Previous in List Next in List Refresh Update/Display Include History

[Student Program](#) | [Student Plan](#) | [Student Sub-Plan](#) | [Student Attributes](#) | [Student Degrees](#)


<b>Step 6.</b>	Whether you are adding a plan the <b>Program Action</b> will be Prgc. Select the Look up magnifying glass to select Plan Change.
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The screenshot shows the Oracle Advanced Advisor interface. The main window displays student information for 'All Gator' with ID '2220991'. The 'Student Plan' tab is selected. A 'Look Up Program Action' dialog box is open, showing search criteria for 'Program Action' and 'Description', both set to 'begins with'. The search results table shows two entries: 'PLNC' with description 'Plan Change' and 'PRGC' with description 'Program Change'. A red arrow points from the 'Program Action' dropdown in the dialog to the 'PLNC' entry in the search results table.

**Step 7.** Select the **Student Plan** tab.

**Step 8.** Plan data from the previous row will default in. click the plus icon  to add a new row.

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Favorites | Main Menu > Records and Enrollment > Career and Program Information > Student Program/Plan

Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees

Ali Gator 2220991

Academic Career: Graduate Student Career Nbr: 0 Car Req Term: 2009 Summer

Status: Active in Program Admit Term: 2010 Fall  
 Effective Date: 08/22/2010 Effective Sequence: 2  
 Program Action: Program Change Action Date: 01/03/2011  
 Action Reason: Requirement Term: 2010 Fall  
 Academic Program: Educ M

\*Academic Plan: GEDL Educational Leadership Major  
 \*Plan Sequence: 10 Degree: MED  
 \*Declare Date: 08/22/2010 Degree Checkout Stat:  
 \*Requirement Term: 0980 2010 Fall Student Degree Nbr:  
 \*Advisement Status: Include Completion Term:

Save Return to Search Previous in List Next in List Refresh Update/Display Include History

Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees

**Step 9.** Add the new Academic Plan by clicking on the Look Up icon.

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Favorites | Main Menu > Records and Enrollment > Career and Program Information > Student Program/Plan

Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees

Ali Gator 2220991

Academic Career: Graduate Student Career Nbr: 0 Car Req Term: 2009 Summer

Status: Active in Program Admit Term: 2010 Fall  
 Effective Date: 08/22/2010 Effective Sequence: 2  
 Program Action: Program Change  
 Action Reason: Requirement Term:  
 Academic Program: Educ M

\*Academic Plan: [ ]  
 \*Plan Sequence: 20  
 \*Declare Date: 08/22/2010  
 \*Requirement Term: [ ]  
 \*Advisement Status: Include

Look Up Academic Plan


Academic Institution: UNOLA  
 Academic Program: MEDUC  
 Academic Plan: begins with [ ]

Look Up Clear Cancel Basic Lookup

Search Results

Academic Plan	Description	Academic Plan Type	Degree
CGI-MA	Curriculum and Instruction	Major	MA
GACERT	Certification	Major	(blank)
GCAO	Add on Certification Only	Major	(blank)
GCAOM	Add on Cert Preceding Masters	Major	(blank)
GCER	Certification Only	Major	(blank)
GCERM	Certif Only (precedes Masters)	Major	(blank)
GCERM1	Cert-Masters-Level One	Major	(blank)
GCERM2	Cert-Masters-Level Two	Major	(blank)

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<b>Step 10.</b>	Click the calendar icon  to choose the Declare Date.
<b>Step 11.</b>	Notice now there are two rows. Click the <b>Save</b> button.

### Change a Students Program

<b>Step 1.</b>	<b>Navigation:</b> Records and Enrollment, Career and Program Information, Student Program/Plan.
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**Step 2.** Enter the student ID number and Click the search button.

**Step 3.** If the student is Active click the plus sign to add a new row.

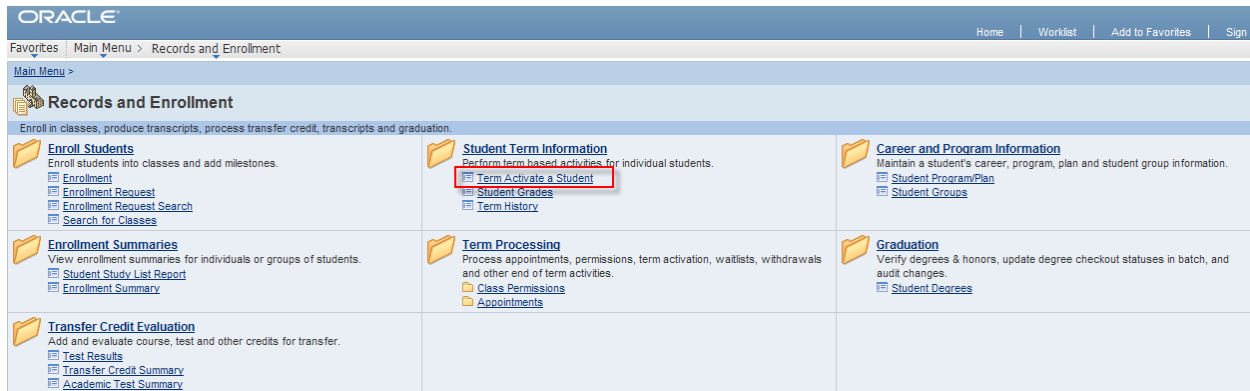
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<b>Step 4.</b>	The effective date will default in with the current date. This date must be on or before the first date of the term in which the program/plan is to be active.
<b>Step 5.</b>	The <b>Program Action</b> will be Program Change (PRGC).

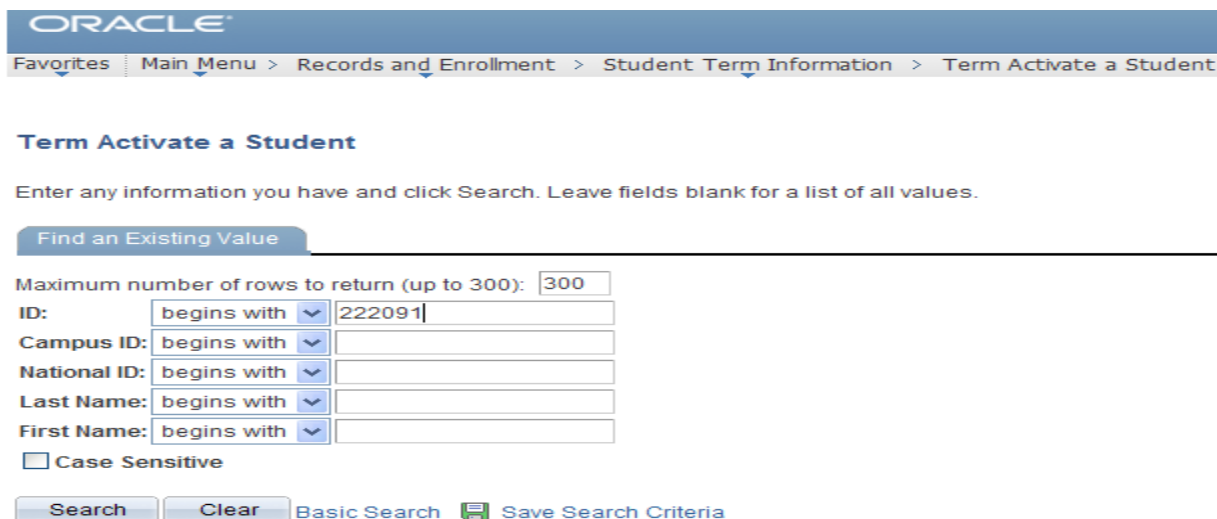
**Note:** If you forget to backdate a program/plan change, contact the Register’s Office or send an e-mail to [jldavis2@uno.edu](mailto:jldavis2@uno.edu).

## View Term Activation

<b>Step 1.</b>	<b>Navigation:</b> Records and Enrollment, Student Term Information, Term Activate a Student.
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<b>Step 2.</b>	Enter the <b>Student’s ID</b> number and click search. If the ID is unknown search for the Student by last or first name.
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**Step 3.** View the Term Activation page to determine if the student is eligible to register for the term.

The screenshot shows the Oracle Advanced Advisor interface. At the top, the Oracle logo is visible. Below it, a breadcrumb trail reads: Favorites | Main Menu > Records and Enrollment > Student Term Information > Term Activate a Student. There are two tabs: "Term Activation" (selected) and "Enrollment Limit". The student's name "Ali Gator" and ID "2220991" are displayed at the top right, along with a red prohibition sign and a star icon. Below this is a search bar with "Find | View All" and a dropdown showing "1 of 3" with "First" and "Last" buttons. The main content area is titled "Academic Career: Non Credit" and contains a form with the following fields:
 

- Academic Institution: UNOLA University of New Orleans
- Term: CEU
- Activation Date: (empty)
- Student Career Nbr: 0
- Override All Academic Levels:
- Academic Year: (empty)
- Override Projected Level:
- Load Determination: (empty)
- Academic Level - Projected: (empty)
- Form of Study: Enrollment
- Academic Level - Term Start: (empty)
- Academic Load: N No Units
- Academic Level - Term End: (empty)
- Billing Career: CNED
- Level Determination: (empty)
- Eligible To Enroll:

 Below the form, there is a "Go to: Calculate Tuition" link and a row of buttons: Save, Return to Search, Previous in List, and Next in List. At the bottom, there is a link: Term Activation | Enrollment Limit

## Increase Student Unit Load


**Step 1.** **Navigation:** Records and Enrollment, Student Term Information, Term Activate a Student.

The screenshot shows the Oracle Advanced Advisor interface with the "Records and Enrollment" menu expanded. The breadcrumb trail is: Favorites | Main Menu > Records and Enrollment. The menu items are:
 

- Enroll Students**: Enroll students into classes and add milestones.
  - Enrollment
  - Enrollment Request
  - Enrollment Request Search
  - Search for Classes
- Student Term Information**: Perform term based activities for individual students.
  - Term Activate a Student** (highlighted with a red box)
  - Student Grades
  - Term History
- Career and Program Information**: Maintain a student's career, program, plan and student group information.
  - Student Program/Plan
  - Student Groups
- Enrollment Summaries**: View enrollment summaries for individuals or groups of students.
  - Student Study List Report
  - Enrollment Summary
- Term Processing**: Process appointments, permissions, term activation, waitlists, withdrawals and other end of term activities.
  - Class Permissions
  - Appointments
- Graduation**: Verify degrees & honors, update degree checkout statuses in batch, and audit changes.
  - Student Degrees
- Transfer Credit Evaluation**: Add and evaluate course, test and other credits for transfer.
  - Test Results
  - Transfer Credit Summary
  - Academic Test Summary

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<b>Step 2.</b>	Enter the <b>Student's ID</b> number and click search. If the ID is unknown search for the Student by last or first name.
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<b>Step 3.</b>	Select, <b>Enrollment Limit</b> tab.
<b>Step 4.</b>	Check the <b>Override Unit Limits</b> box.
<b>Step 5.</b>	Enter new limits.
<b>Step 6.</b>	Click  <b>Save</b> button.