



## New AUBsis Advisor Portal Guide

### Accessing the Banner XE Student Advisor Profile

#### Where to go

To access the Banner XE Advisor Profile:

1. Click AUBsis link at AUB website
2. Login as advisor using your NetID credentials (email user name and password) by choosing the following page link “Login as advisor”

A screenshot of the AUB login page. At the top left is the AUB logo. Below it is a dark blue header with the text 'Login to AUB'. A security warning reads: 'For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!'. The main content area is split into two parts: a login form on the left and a cityscape image on the right. The login form is titled 'Enter your Username and Password' and contains fields for 'Username:' (with 'abc123' entered) and 'Password:' (with masked characters). There is a checkbox for 'Warn me before logging me into other sites.' and 'LOGIN' and 'clear' buttons. The cityscape image shows a view of a city at night with lights and buildings.

### Navigating the Banner XE Student Advisor Profile

#### Advisee Search Screen

The first screen displayed in Banner XE Advisor Profile is the “Advisee Search” screen

- Use the Advisee Search page to select the term for which you would like to search for a specific advisee to view their student profile information.
- The selected term will determine which advisees you have access to as well as which information will be displayed for the students.
- You can search for one of your advisees individually by Student ID(201701234), Student Email, or Students Name and click “View Profile” to view this specific student's information.
- To see ALL advisees that are assigned to you for the selected term click the “View My Advisee Listing” Button, which will open the “Advisee Listing Screen”.

## Advisee Listing Screen

The Advisee Listing provides a list of all students with whom you have an active advising relationship for the given semester. You can sort, filter, and/or download the list of advisees, email advisees, and you can access an individual student's profile from this page

- Navigate through all advisees using the horizontal arrow keys at the bottom of the screen
- Quickly filter by the information criteria displayed by clicking the Column headers
- For more advanced filtering click the "Filter Button" in the right corner
- The "Email All" button allows you to quickly send a BCC message to advisees
- To download an Excel list of your advisees select Tools>Export Advisee Listing>Export
- If your advisees are filtered this export will only include the students in the filter

Name and ID	Program	Primary Major	Academic Standing	Student Status	Student Type
[Redacted]	Arts & Sci Advising Progra...	Undeclared	Academic Probation	Active student	Returning
[Redacted]	Arts & Sci Advising Progra...	Undeclared	Good Standing	Active student	Continuing (Prior CE)
[Redacted]	Business Administration	Business Administration	Good Standing	Active student	Continuing (Prior CE)
[Redacted]	Arts & Sci Advising Progra...	Undeclared	Good Standing	Active student	New First Time (Prior No...
[Redacted]	Business Administration	Business Administration	Good Standing	Active student	Continuing (Prior CE)
[Redacted]	Arts & Sci Advising Progra...	Undeclared	Good Standing	Active student	Continuing (Prior CE)
[Redacted]	Arts & Sci Advising Progra...	Undeclared	Good Standing	Active student	Continuing (Prior CE)
[Redacted]	Arts & Sci Advising Progra...	Undeclared	Academic Probation	Active student	Continuing (Prior CE)
[Redacted]	Arts & Sci Advising Progra...	Undeclared	Good Standing	Active student	New First Time (Prior No...

## Email All

To email the students in the advisee list, perform the following steps.

1. Select the Email All button.
2. Outlook will be opened with all students BCC'ed
3. Write the body text and send

\*\*\*Note: When a filter is in use, only the students on the filtered list are emailed.

## Advanced Filtering

Advanced filtering allows the user to filter on specific values between one or multiple criteria

- The first field allows the user to select what criteria to filter on
- The second field allows the user to determine the command of the value
- The third field allows the user to enter a specific value
- Use "Add Another Column" to add multiple criteria records to your filter
- To delete a criteria record press the minus symbol on the right

## Viewing Student Profiles through the Banner XE Advisor Profile

The *Student Profile* contains a wealth of information about a student on a single page. Students also have access to their own profile in AUBsis.

Information available from the Student Profile includes:

- Student Photo
- Student name and ID
- Basic biographic and demographic information
- General information about the student (level, classification, student status, residency)
- Academic advisor details
- Curriculum details
- Class schedule (the Registered Courses list only includes active registrations)
- Prior education details (including institutions attended and degrees earned) and Test Scores
- Academic Standing
- Overall earned hours and GPA
- A Registration Notices section, which displays information about items that could impact a student's ability to register for the term

## How to View a Student's Profile

There are two ways to access a student's profile

1. From the Advisee Search Screen use "search by" to find a student and click "View Profile"

Change term, search for a student, or view your advisee listing

Term  
Spring Semester 2017

View advisee listing, or search by

Student ID ?

Student Email ?

Student Name ?

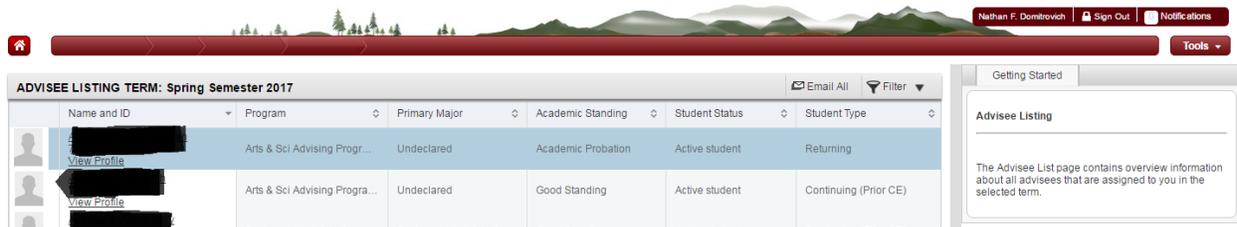
View Profile View My Advisee Listing

Getting Started

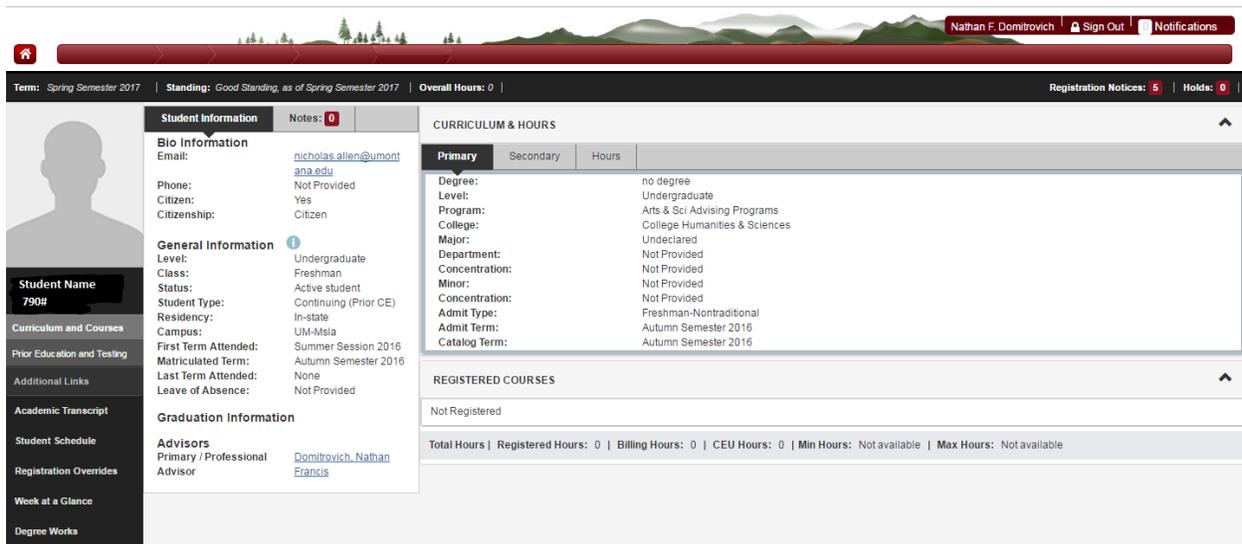
Advisee Search

Use the Advisee Search page to select the term for which you would like to search for a specific advisee to view their student profile information. You may also click View My Advisee Listing to see all advisees assigned to you in the selected term.

2. From the Advisee Listing Screen select “View Profile” underneath the students Name



## Navigating a Student’s Profile



Before analyzing a student’s information ensure the correct term is selected in the right hand corner. The term information being displayed in for the term you selected on Advisee Search Screen.

Below are the descriptions of the screenshot:

1. Curriculum and Courses- Displays curriculum information for the student’s primary degree, secondary degree, and any hours earned towards the degrees. Registered courses for the selected term are shown below

- A. Primary Degree Tab
- B. Secondary Degree Tab
- C. Hours Earned

2. Prior Education and Testing- Displays High School and Post-Secondary information as well as any Placement testing and cores

3. Academic Transcript- Link to unofficial web transcript

4. Student Schedule- Link to student’s concise schedule for selected term

5. Week at a Glance- Link to student’s week at a glance schedule for the selected term

6. Student Information- Displays general information about student and their academic criteria

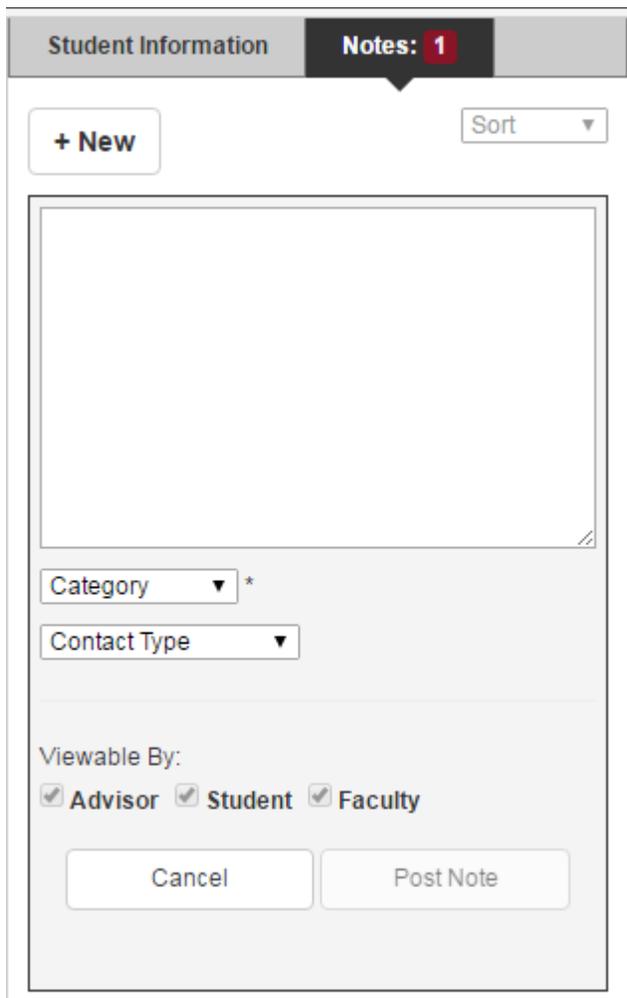
7. Notes Tab- Select this tab to add advising notes for the student

8. Registration Notices- Displays term selected Academic Standing, Student Status, Enrollment Status, and the student's registration PIN
9. Holds- Displays any holds associated with the student for the selected term

## Adding Notes to a Students Profile

To Add an Advising note select the Notes Tab and then "+ New"

1. Type the Note in the Text Box area
2. Select a relevant category
3. Select a Contact Type
4. When finished click "Post Note"



The screenshot shows a web interface for adding a note to a student's profile. At the top, there are two tabs: "Student Information" and "Notes: 1", with the "Notes" tab selected. Below the tabs, there is a "+ New" button on the left and a "Sort" dropdown menu on the right. The main area contains a large, empty text box for entering the note. Below the text box are two dropdown menus: "Category" with an asterisk and "Contact Type". Underneath these is a "Viewable By:" section with three checked checkboxes: "Advisor", "Student", and "Faculty". At the bottom, there are two buttons: "Cancel" and "Post Note".

You can view any notes posted for your advisee under the Notes Tab