Advisor Mode Tutorial: How to use Advisor Mode to create a student’s schedule plan in the most efficient way possible!

Advisor Mode adds a new feature to the Advisors menu on the Faculty Tab in Self-Service Banner. This allows users already configured as Advisors to select a student (in SSB) and sign on to Schedule Builder “as” the selected student. The Advisor can then add courses to the student’s plan, generate potential schedules, and “lock in” courses.

Note: The Advisor Mode feature allows an advisor to pre-populate the students’ course schedule. The Advisor Mode feature will not allow an advisor to register a student for courses and does not display the Send to Shopping Cart button option.

Part One: Logging In and Accessing Schedule Builder
To begin, go to GoldLink: https://goldlink.etsu.edu/

Login by entering your ETSU email address and password.

On the Advisors Page, click + to open Advisor Registration Tools.

Under the options in Banner Links, click Schedule Builder-Advisor Mode.
Part Two: Selecting Your Search Criteria

Select Term
Select the Term that you will be using to build for your student’s class schedule; click Submit.

Select Student and Advisee ID Selection
Enter the Student or Advisee’s ID (E#) or search by Student and Advisee Query; click Submit.

Please Verify the Student or Advisee’s Information; click Submit.

Bucky E. Buccaneer is the name of the student or advisee that you selected.
Wait a few seconds to be automatically redirected to Schedule Builder.

Select Campus
Select the Campus by checking the box beside the campus selections; click ✓ Save and Continue.
NOTE: The Campus checked will ONLY allow courses offered at that campus to display in schedule options.

Select Additional Search Criteria:
The Home Screen displays Additional Search Criteria that you can filter by clicking the Change button.

Additional Search Criteria Definitions:
Course Status: (Open Classes Only or Open & Full)
Sessions: (All Sessions Selected or Individual Session)
Instructional Methods: (In Person or Web)
Term: (Spring/Winter, Summer, Fall)
Campuses: (Campuses)
Levels: (Academic Level)
Part Three: Building Your Student’s Schedule
To build the student’s schedule; click one of the following options:
NOTE: The Student’s ID (E#) will display below Additional Search Criteria.
A. + Add Course
or
B. click here (ACTIVE Degree Works Plan)*This Option will ONLY display with an ACTIVE Degree Works Plan*
NOTE: If you do not have an ACTIVE Degree Works Plan created, then you will have to create one.
Please visit Degree Works Video Tutorials: http://www.etsu.edu/reg/degreeworks/tutorials.aspx

+ Add Course
Select the + Add Course Button

+ Add Course
Click the + Add Course Button.
The Add Course Screen will display with the Tab options that you can filter to build the schedule.

Tab Definitions:
By Subject: (Course Subject) *Most Commonly Used*
By Course Number: (Course Number)
By Instructor: (Instructor Name)
By Degree Works Plan: (ACTIVE Degree Works Plan) *This Tab will ONLY display with an ACTIVE Degree Works Plan.*

NOTE: If you do not have an ACTIVE Degree Works Plan created, then you will have to create one.

Please visit Degree Works Video Tutorials: http://www.etsu.edu/reg/degeworks/tutorials.aspx

*For this tutorial we will continue building the schedule by clicking the By Subject Tab option.*

Building with the By Subject Tab
Click the By Subject Tab

NOTE: If a Subject or Course is not displaying, it might not be offered during a particular term.

Click the Subject from the Subject dropdown box.
Click the **Course Number** from the Course dropdown box.

The course description will display for the course selected.

Click the **+ Add Course** button, which will move the course you have added under Courses. Continue selecting additional courses to build your schedule.
Once you have finished adding courses, click the < Back button taking you back to the Home Screen.

The courses you have added for the student will display under Courses on the Home Screen.
Part Four: Generating Schedules

Click the Generate Schedules button. The schedules that are generated will take into account all search criteria. Within seconds, Schedule Builder will provide you with every single schedule option based off search criteria selected!

Part Five: Viewing Generated Schedules

To view the generated schedules, click the View button under Schedules.
The student’s potential schedule that you selected to View, will display a week at a glance.

ID: E00000000

Part Six: Locking In Schedules
In the potential schedule view, as an advisor you can “lock in” a specific course by clicking on the Unlocked icon. The Locked icon will now display on the course you have “locked in”. The locked courses will display on the potential schedule you are building for the student.

NOTE: Locking a course does NOT save a seat or register a student for the course, it locks in a course for a potential schedule.

ID: E00000000
Advisors are now at the FINAL step!

NOTE: Advisors only have an option to pre-populate the students’ course schedule and do not have the Send to Shopping Cart button option. A student can adjust any pre-populated schedule plan that an advisor has built.

After you have “locked in” course suggestions for the student, click Sign out.

An automatic pop up question will display: Are you sure you would like to exit Schedule Builder. To sign out, click OK.

NOTE: This is the final step for an advisor using Advisor Mode.
*The courses locked by an advisor will now display in the Student’s Schedule Builder view.*

**Student’s Schedule Builder View EXAMPLE:**
The courses that the advisor “locked in” are displayed under Courses in the Student’s Schedule Builder. **Note:** A student can adjust any potential schedule plan an advisor has built.

The example below displays the view in the student’s Schedule Builder.

To continue, the student will need to click the Generate Schedules Button.
Once the student has determined a potential schedule, the student will need to click the **Send to Shopping Cart** button.

An automatic pop up question (for the student) will display: This schedule will now be transferred to the Shopping Cart and the Schedule Builder will close. Do you want to continue? For the student to have the potential schedule transferred to the Registration Shopping Cart, click **OK**.
The student is now at the Final Step!

The student’s potential schedule will display in the student’s Schedule Builder Registration Cart.

Note: The Schedule Builder Registration Cart displays a potential schedule only. The schedule in the Registration Cart does not mean the student is registered for the courses or will be registered at their first available registration time slot.

The student example below displays the potential schedule in their Schedule Builder Registration Cart. In order for the student to register for classes, they must click the Register button when their first available registration time opens.

If NO registration add errors occur, the courses from the Schedule Builder Registration Cart will display on the Add or Drop Classes page under Current Schedule.