MyInfo Advisor Management Tool – Directions for Department Staff

This tool allows staff members to enter advisors for graduate students and that information feeds directly into Banner form SGAADVR (the advisor form in Banner) and displays in DegreeWorks. Recording this in Banner helps with communications intended for advisors, especially at the beginning of the graduate student's time at MSU before the student has submitted their full committee. Staff can make mass updates in this tool—that is, they can search for all of their graduate students, see who does not have an advisor, and update the student's advisor all in the same MyInfo screen.

We ask that departments assign master's and doctoral students an advisor as early as possible, and this advisor be entered in the Advisor Management tool in MyInfo. This advisor can change. Note, certificate students, some master's programs, and Nursing are already automatically assigned an advisor in the first semester.

Students will still complete the Graduate Committee form in MyInfo which records the full committee (including the committee chair) by the deadline for their level (master or doctoral).

To use the tool:

Log in to MyInfo and select the Advisor tab. The Advisor Management Tool is linked at the bottom of the list. Don't have access? Submit a HelpDesk (helpdesk@montana.edu) ticket requesting it. The request goes through The Office of the Registrar.

1. Click the drop-down options at the top to perform your search. Always make sure to set the level to GR – graduate.

Examples:

- In this example, College of AG, Level GR, and Department AGED are selected. This produced a list of students with advisors and students without.

- If you only want to see students without advisors, you can click the slider to the right:

Not selected

Selected

- Below is an example of results without the slider clicked. This list shows students with an advisor and students without:

Search Results

	Update Primary Advisor	Update Major Advisor	Update Secondary Major Advisor	Update Minor Advisor

	☑	GID	Student Name	Current Advisor Effective Term	Primary Advisor	Major Advisor	Secondary Advisor	Minor Advisor
✏️	☑	⬛	⬛	2023 Fall	Arnold, Shannon ⬛			
✏️	☑	⬛	⬛	2021 Fall	Perry, Dustin ⬛			
✏️	☑	⬛	⬛					
✏️	☑	⬛	⬛					
✏️	☑	⬛	⬛					
✏️	☑	⬛	⬛					

Note: we are only concerned with the Primary Advisor field at the graduate level.

2. To update an advisor, click the boxes on the left to select or de-select students. If you keep multiple students selected, you can update a group of students to the same advisor. To change one at a time, make sure you only have one student selected.

3. Click "Update Primary Advisor":

Level	Student Type	Class
GR - Graduate - Semester ⌄	All ⌄	All ⌄

Advisor Type	Advisor	Student GID	Only Students Without An Ac
All ⌄	Advisor ⌄	Student GID	⚪

Search	Clear

Search Results

	Update Primary Advisor	Update Major Advisor	Update Secondary Major Advisor	Update Minor Advisor

☑	GID	Student Name	Current Advisor Effective Term	Primary Advisor	Major Advisor	Secondary Advisor	Minor Advisor	College and Department

An "Update Advisor" pop-up window will open:

4. In the "Advisor Selection" section, click the "New Advisor" down arrow or start typing to search for the advisor you want to add for the student(s):

5. Select the correct advisor. Then click Save. This will update Banner and overnight will refresh/update to DegreeWorks.