# Using UNA Portal for Advising

University Advising Services First-Year Advisor Program

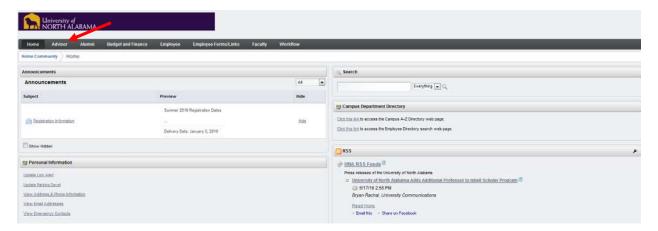
May 23, 2016

# **Using UNA Portal for Advising**

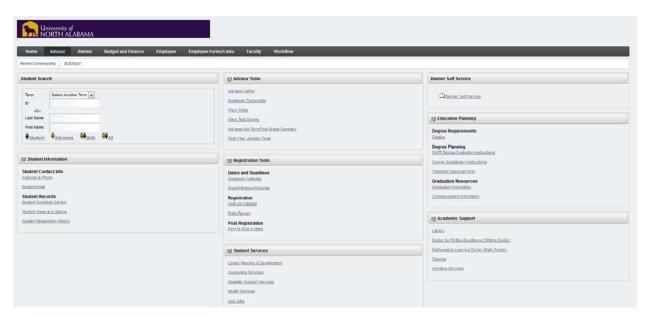
Although there are many tabs in UNA Portal that are used by faculty and staff alike, this document focuses on those needed for academic advising.

Once you login to UNA Portal, you will notice several tabs across the top. (You can always access Self-Service Banner the way you did in the past by clicking on the Faculty or Employee tab at the top, then clicking on the link for Self-Service Banner).

However, there is now an Advisor tab for everyone who is a First-Year Advisor or major advisor at UNA.



When you click on **Advisor**, the following screen appears:



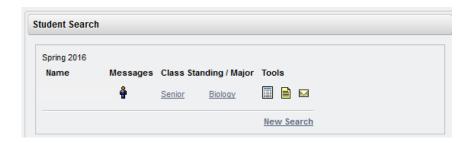
Everything you will need as an advisor is right here! This keeps you from going from place to place like you used to do with the old access to student information.

There are three columns that are divided into several sections.

- First column has Student Search and Student Information sections
- Second column has Advisor Tools, Registration Tools, Student Services sections
- Third column has original link to Self-Service Banner, Education Planning, and Academic Support

#### **Student Search**

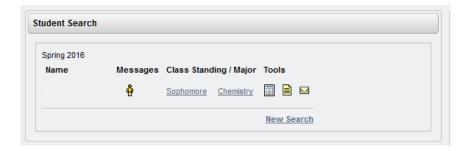
If you are looking for information on a particular student in one of your classes, you can select the current term, type in the student's last name, and click on Student. If that student were in a class of yours, this is what you would see:



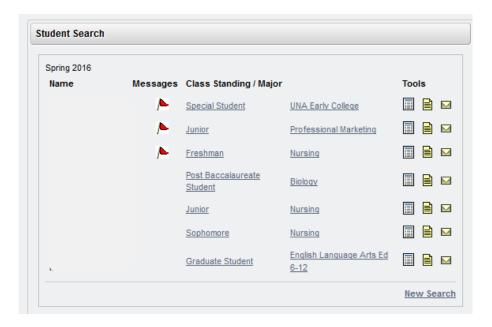
The last section "Tools" shows three icons. They are:

- Transcript icon takes you to their transcript in Banner
- Test Scores icon takes you to their test scores in Banner
- Email icon –allows you to email the student through your Outlook

If you want to look specifically at one of your advisees, you can type in his/her last name after selecting the current term and clicking on Advisee and you get a similar window:



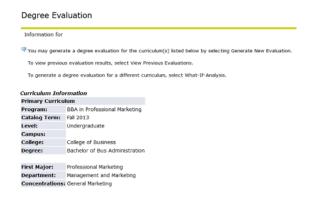
Finally, you can search for *any* student by last name. Depending upon how specific your search is, you might get a few names listed:



The red flag under Messages means that a student has a hold on his/her account that will prevent him/her from registering for classes and other activities depending upon the nature of the hold.

This screen also lists a student's class standing, major, and the same three icons as before.

If you click on the **Class Standing** for a particular student, you will get this screen:



The catalog year, and current major are listed.

If you click on the major from the original screen, you will get the following screen:

#### General Student Information

Information for

Citizenship:

Student Information effective from Spring

2014 to The End of Time
Registered for Term: No
First Term Attended: Fall 2013
Last Term Attended: Spring 2014
Status: Active
Residence: In-State Resident

 Student Type:
 Transfer

 Class:
 Junior

 Primary Advisor:
 Jana P. Beaver

 Primary Advisor Type:
 Advisor

 Expected Graduation Date:
 Dec 15, 2019

 Expected Graduation Term:
 Fall 2019

 Expected Graduation Year:
 2019-2020

Curriculum Information

Current Program

Bachelor of Bus Administration

Bachelor of Bus Administration

Level: Undergraduate

Program: BBA in Professional Marketing
Admit Term: Fall 2013

Catalog Term: Fall 2013
College: College of Business

Major and Department: Professional Marketing, Management and Marketing

U.S. Citizen

Major Concentration: General Marketing

For this student, notice he/she began in Fall 2013 and the last term attended was spring 2014.

Registered for Term: No; he/she was last registered for Spring 2014.

He/she is also an in-state resident, a US Citizen, and is a junior transfer student.

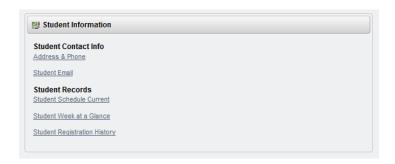
**NOTE:** his/her primary advisor is listed next. If you find a freshman for whom no advisor is listed, please let University Advising Services know.

The expected graduation date and term is seven years from the intitial start term. This date and year will change once a student applies for graduation.

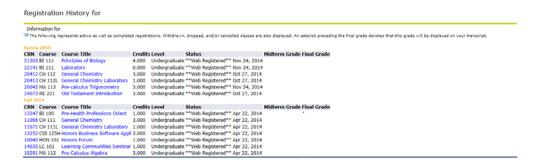
Other curriculum information is listed such as his/her degree, major, major concentration, etc. That information is what Banner says that student's major, etc. is.

### **Student Information**

The second section is Student Information. Here you can look up a student's permanent address, phone number, and email. In addition, you can see a student's current class schedule, Student Week-At-A-Glance, and a student's registration history.



• **Student Registration History** - lists all of the classes in which a student has been enrolled by semester. Grades listed as the grades that are included on the transcript (grades and names have been blocked off to maintain confidentiality)

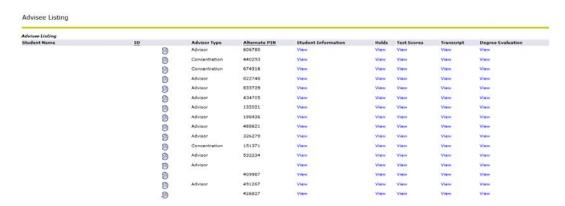


#### **Advisor Tools**



Under Advisor Tools (which is where you will spend most of your time), there are links to:

Advisee Listing – lists your current assigned advisees; make sure you select the current semester

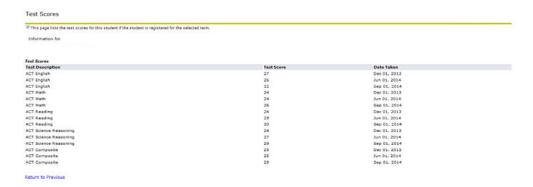


There are several important items here:

- o Student Name student names have been omitted due to confidentiality
- o ID (L number)- has been omitted due to confidentiality
- o **Email** icon- allows you to email the student through Outlook
- o **Advisor Type** whether you are advising a student in a particular concentration (mine is prehealth; you may not have one). Some of these are blank.
- o **Alternate PIN** a student's PIN. This changes from semester to semester. You may print this page. Those students with no PIN listed are supposed to be graduating during the current semester, so no PIN is needed for any future semester
- o Student Information allows you to view student information
- o Holds allows you to view what holds a student has prior to pre-registration
- Test Scores allows you to view student test scores (ACT or SAT); transfer students may not
  have any scores listed as it is not a requirement for admission to UNA

Remember that entry into English and Mathematics classes is depending upon ACT sub scores! There are no exceptions.

- Transcript allows you to view a student's transcript
- o Degree Evaluation allows you to view a student's degree evaluation
- Academic Transcripts allows you to view a student's academic transcripts as seen on Banner
- View Test Scores. If you have not already entered a student's name and/or L number, you will
  be prompted to do that. Clicking on the Submit button then takes you to a screen that looks like
  this:



 View Holds. This screen allows you to see which holds a student has and from which office on campus. Remind students that ALL holds must be resolved before a student can either preregister for classes or register for classes. Some holds will prevent students from seeing their grades for the semester or requesting transcripts. I usually write down the hold on the Advising Recommendation Form as a reminder to the student to get that hold resolved.

• Advisee Midterm/Final Grade Summary – it is here that you will find the midterm or final grades of your advisees to whom you have been assigned.

Notice on this student below that he/she did not receive any mid-term grades. It could have been that he/she did not have any D's or F's at midterm. It is also possible that the professors did not assign *any* midterm grades for *any* student. Because the fall semester is over, that is why the final grades are also listed. Also note that this student withdrew with a "WP" from CH 111 and CH 111L and from BI 200W.



Below is another student who *did* receive several mid-term grades, a U in EN 099 and a D in CH 101. Also note that this student withdrew with a "WF" from MA 100, something you would not know about at mid-term. Basically, this student failed to complete the two remedial classes in which he/she was registered for that semester.



• First-Year Advisor Tools – takes you to the First-Year Advisor Resource page

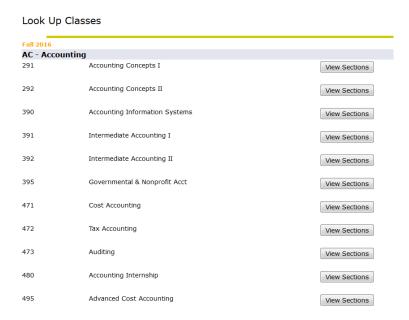
# **Registration Tools**



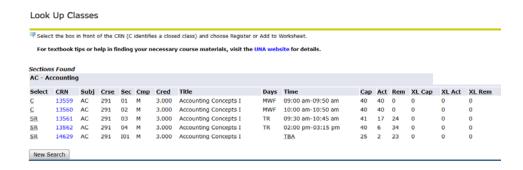
- Academic Calendar takes you to the webpage (<a href="https://www.una.edu/calendar/#/academic">https://www.una.edu/calendar/#/academic</a>)
   that has the university's academic calendar
- **Drop/Withdraw/Refunds** takes you to the webpage that lists important dates in the semester as well as semester exam schedules
- **Look Up Classes** VERY IMPORTANT RESOURCE!! When you click on this and select a term, the following screen appears.



If you clicked on Accounting, then **Course Search**, you should see a list of all accounting classes offered for the semester you chose, in this case fall 2016. You will likely have to scroll down to see the complete list.



If you click on View Sections on Accounting 291, here is what you would see:



This allows you to see the course sections available, their times, and the current enrollment as well as the professors who are teaching the sections (there is more on the screen that is not shown). Class locations are also listed. If the registration period had been open, the first column would give you the option of clicking on an open box to register for the class (if you were a student!)

• **Pride Planner** – a pdf file of how to use the Course Scheduler; students learn how to use this during SOAR

#### **Post Registration**

• **How to Drop a Class** – takes you to the Registrar's website that describes the steps a student must do to drop a class during the drop period.

#### **Student Services**

Lists several student support services to whom you might refer a student. Each takes you to the appropriate webpage.

#### **Banner Self-Service**

Self-explanatory; takes you to the old way of accessing Self-Service Banner

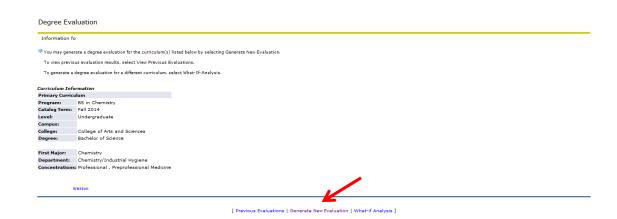
# **Education Planning**

#### **Degree Requirements**

 Catalog – Takes you to the Registrar's webpage that lists the current UNA catalog and all past catalogs as pdf files

# **Degree Planning**

- CAPP (Curriculum Advising & Program Planning) Degree Evaluation Instructions shows you
  how to use CAPP Degree Evaluation (see below) here you can run a degree evaluation on any
  student to see which courses have been completed and those that are still necessary based upon
  the major and minor that are in Banner. If the major and/or minor is incorrect, the degree
  evaluation will also be incorrect.
  - When you click on CAPP degree evaluation, you will be asked for either your student's name or L number so that he/she can be identified. Once you do this, then you will come to the following screen:



If you now click on **Generate New Evaluation** (see arrow), it will ask you to click on the radio button for the degree program and there is a term that needs to be selected (use the current term).



Select the current term, then click on **Generate Request**.

You can run the degree evaluation on General Requirements (General Requirements), Detail Requirements, and Additional Information.



# Clicking on **General Requirements** then **Submit** brings you to the following screen:

# General Requirements Information for This is NOT an official evaluation Program Evaluation To learn more about CAPP, please visit the Online Degree Evaluation \*\*\*\*GRADUATION: To be eligible for graduation, you must apply TWO semesters in advance. Deadlines are adhered to and there are no exceptions. Please visit Apply to Graduate for deadlines and instructions on how to apply on-line via your UNA Portal. \*\*\*\*!fcRADUATION REQUIREMENTS!! \* 120 hours total \* 50% at a senior institution \* 36 hours 300/400 level \* 25% of 100/400 level at UNA \* one-half of 300/400 level of your major at UNA \* one-h Catalog Term : Evaluation Term : College of Arts and Sciences Bachelor of Science Undergraduate Chemistry Chemistry/Industrial Hygiene Evaluation Term : Expected Graduation Date : Request Number : Results as of : Minors : Concentrations : Jan 26, 2015 Professional Preprofessional Medicine Met Total Required: 120.000 29.000 12 Program GPA : Overall GPA : Other Course Information Subject Exit Exam - Not Met Area I - Written Composition ( 6.000 credits ) - Not Met This is a graduation requirement. Please visit the department you are majoring in to find out more details about this exam. Grades in all freshman composition courses are awarded as A, B, C, or NC (no credit). Students who receive a grade of NC must repeat the course until they have earned a grade of C or Area II - Humanities/Fine Arts ( 12.000 credits ) - Not Met Area III - Chemistry ( 11.000 credits ) - Met 3.000 B 201510 - CH 111 General Chemistry 1.000 C 201510 - CH 111L General Chemistry Laboratory 3.000 \* 201520 - CH 112 General Chemistry 1.000 \* 201520 - CH 112L General Chemistry Laboratory 3.000 \* 201520 - MA 112 Pre-Calculus Algebra 11.000 Credits 0.000 Credits .00 GPA 2.75 <u>GPA</u> Prof Chemistry Major ( 77.000 credits ) - Not Met 11.001 Area IV-Hist, Social/Behav Sci ( 12.000 credits ) - Not Area: 3.000 B 201510 - CH 111 General Chemistry 1.000 C 201510 - CH 111L General Chemistry Laboratory 3.000 \* 201520 - CH 112 General Chemistry 1.000 \* 201520 - CH 112L General Chemistry 8.000 Credits 3.000 B 201510 - CH 111 General Chemistry 1.000 C 201510 - CH 111L General Chemistry Laboratory 3.000 \* 201520 - CH 112 General Chemistry 1.000 \* 201520 - CH 112L General Chemistry Laboratory 1.000 F 201510 - BI 100 Pre-Health Professions Orient 1.000 C 201510 - LC 101 Learning Communities Seminar 3.000 B 201510 - MA 100 Intermediate Algebra 1.000 C 201510 - MS 111 Concepts of Leadership 4.000 \* 201520 - BI 111 Principles of Biology 8.000 Credits 2.75 GPA 9.000 Credits 2.17 GPA Total 36/Residence 32 300/400 ( 36.000 credits ) - Not Area : Any course that has been Repeated/Recomputed will not show in the list of courses. The transcript will need to be viewed for the correct overall gas. \*\*\*\* In the above AREA: Total 36/Residency 32 300/400 Level, there may be a course where the hours are split. If so, this course will show twice in the UNA GPA area, however, it will NOT be counted twice. 1.000 F 201510 - Bit 100 Pre-Health Professions Orient 3.000 B 201510 - CH 11 Cleared Chemistry 3.000 B 201510 - CH 11 Cleared Chemistry 3.000 B 201510 - CH 11 Level Composition I 3.000 B 201510 - IN 101 Wind Civilization to 1500 1.000 C 201510 - IV 101 Wind Civilization to 1500 1.000 C 201510 - IV 101 Wind Civilization to 1500 1.000 C 201510 - Ma 100 Intermediate Algebra 1.000 C 201510 - Ma 100 Intermediate Algebra 1.000 C 201520 - SH 11 Principles of Biology 1.000 C 201520 - SH 11 Principles of Biology 3.000 \* 201520 - HI 102 World Civilization Since 1500 3.000 \* 201520 - HI 102 World Civilization Since 1500 3.000 \* 201520 - MA 112 Pre-Calculus Algebra 29.000 Credits 2.63 GPA 0.000 E-mail Isaac K. Weston

[ Current Enrollment | Current Enrollment | Previous Evaluations | Generate New Evaluation | What-If Analysis ]

If you go back and click on **Detail Requirements**, you get a screen that looks like this:

#### Detail Requirements

Program Evaluation
To larm more about CARP, please visit the Online Degree Evaluation \*\*\*GRADUATION: To be aligible for graduation, you must apply TWO sensesters in advance. Deadlines are softward to and there are no exceptions. Please visit Apply to Graduate and instructions on how to apply on-line via your UNA Portal. \*\*\*\* INCRADUATION REQUIREMENTS!\*\* 120 hours costs - 500% at a senior electronic \*\*-36 hours 300/400 level at 5 your most than the cost of th

Professional Preprofessional Medicine

0.000

Subject Exam - Not Met
This is a graduation requirement. Please visit the department you are majoring in to find out more details about this exam.

Condition Rule Subject Attribute Low High Required Credits Required Courses Term Subject Course Title Attribute Credits Crade Source

EXIT 000 .000 .00

Total Credits and GPA 0.000 .00

unofficial evaluation

Area 1 - Written Composition ( 6.000 credits ) - Rot Met
Description: Onces in all freshman compositions courses are sursides as A. B. C. or NC (no credit). Students who receive a grade of NC must repeat the course until they have earned a grade of C or better
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Total Credits and GPA 3.000 3.00

211 221 231 High 212 222 232 6.000 6.000 6.000 6.000 6.000 6.000 231 233 233H 232 234 234H 201 201H 210

Courses are: AA 170,281,282; FL 100; FR 101/111. 102/112 201. 202: GR 101/111. 102/112. 201. 202: SP 101/111. SP 102/112. 201. 202: MU 222, 244; PHL 201. 205: RE 221, 231,774 210

Total Credits and GPA 0.000 .00

 
 Area III - Chemistry (11.000 credits ) - Het
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 COURSES ARE: MA 112, 115 OR 125
 Term Subject 201320 MA 201510 CH 201510 CH 201520 CH 201520 CH 111 111L 112 112L General Chemistry General Chemistry Laboratory General Chemistry General Chemistry Laboratory Yes JAND( SEQUENCE - 8 HRS COURSES ARE: CH 111/111L AND 112/112L 1 Total Credits and GPA 11.000 2.75

Area Area IV-Hist, Social/Behav Sci ( 12,000 credits ) - Not Met

 
 Term
 Subject Course Title
 Attribute Credits Crade Source

 201510 H1
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 201520 H1
 102
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Yes ( HI 101 

Total Credits and GPA 6.000 3.00

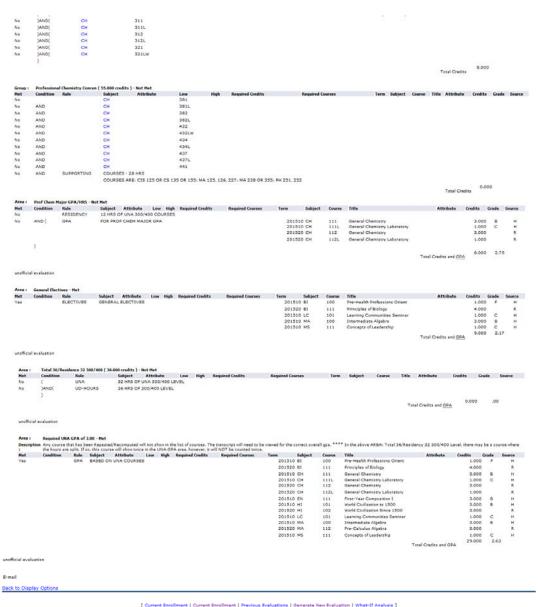
 
 Area :
 Prof Chemistry Major ( 77.000 credits ) - Not Het

 Het
 Condition
 Description

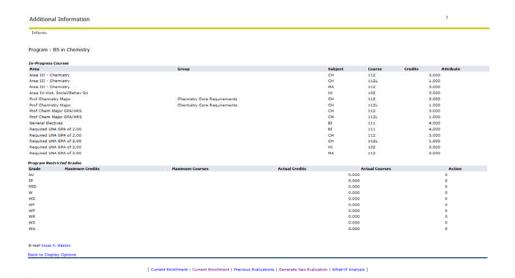
 No
 Chemistry Core Requirements

 No
 AND
 Professional Chemistry Concen
 23.000 55.000

- Not Met Low High Required Credits 111 111L 112 201510 CH 201510 CH 201510 CH 201520 CH Course Title
111 General Chemistry
111L General Chemistry Laboratory
112 General Chemistry



If you go back and click on **Additional Requirements**, you get a screen that looks something like this:



What-If Analysis

You can do a **What-If Analysis** to see what a student's degree program would look like if he/she changed majors. Click on **What If Analysis** at the bottom of the previous screen.



First, select the term in which the student began at UNA. Then click **Continue**.



Using the drop-down box select a new degree program. Let's say he/she is interested in changing to a BS in Psychology. Click on **Continue**.

# Information for Infor

[ Current Enrollment | Current Enrollment | Previous Evaluations | Generate New Evaluation ]

Use the Drop-Down box with First Major to select Major. Then click on **Submit**. The evaluation generated will be the same as before with the **General Requirements**, **Detail Requirements**, and **Additional Information** as options, which will not be listed here.

- Course Substitution Instructions takes you to the Registrar's website that shows how to submit a course substitution
- Transient Approval Form takes you to the Registrar's website where this form is located. Students must complete this form and have their academic advisor sign it before taking it to the Dean of the college in which the course is taught

#### **Graduation Resources**

- **Graduation Information** takes you to the Registrar's website where information about graduation is located. There are deadlines for applying for graduation and a \$30 fee involved.
- Commencement Information outlines logistical information about commencement ceremony

#### **Academic Support**

- Library
- Center for Writing Excellence (Writing Center)
- Mathematics Learning Center (Math Center)
- Tutoring
- Advising Services