When adding or removing academic advisors from a student on SGAADVR, follow the instructions below to preserve the history of student/advisor relationships over time. Click on a link below for details:

1. **Common Banner INB Commands**
2. **Add a new advisor**
3. **Remove an existing advisor when NO other advisors exist**
4. **Remove an existing advisor when other advisors exist**

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### Common Banner INB Commands

<table>
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<tr>
<th>Symbol</th>
<th>Function</th>
<th>Shortcut</th>
<th>Symbol</th>
<th>Function</th>
<th>Shortcut</th>
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<tr>
<td>📉</td>
<td>Save</td>
<td>F10</td>
<td>📉</td>
<td>Previous Block</td>
<td>Ctrl Page Up</td>
</tr>
<tr>
<td>📐</td>
<td>Rollback</td>
<td>Shift F7</td>
<td>📐</td>
<td>Next Block</td>
<td>Ctrl Page Down</td>
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<tr>
<td>📐</td>
<td>Select</td>
<td>Shift F3</td>
<td>📐</td>
<td>Enter Query</td>
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<tr>
<td>🍃</td>
<td>Insert Record</td>
<td>F6</td>
<td>🍃</td>
<td>Execute Query</td>
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<tr>
<td>🌾</td>
<td>Delete Record</td>
<td>Shift F6</td>
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<td>Print</td>
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<tr>
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<td>🌾</td>
<td>Next Record</td>
<td>Page Down OR ↓</td>
<td>🌾</td>
<td>Show Keys (Shortcuts)</td>
<td>Ctrl F1</td>
</tr>
</tbody>
</table>

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### Add a new advisor

1. Enter the student ID and the effective (from) term in the key block.
2. Click the Next Block button to the Advisor Information block.
3. If the Maintenance icon is grayed out, you can proceed to step #6 below.
4. If the Maintenance icon is yellow/highlighted (as in the screenshot below), click it.

![Screenshot of SGAADVR with Maintenance icon highlighted](image-url)
5. A pop-up box will appear – select **Copy Advisor**:

6. Click in the next available row and enter the new advisor’s ID, or search for the advisor by following these steps:
   a. Place your cursor in the ID field and press the F9 key
   b. You will now be in the Faculty/Advisor Query screen – click the Next Block button.
   c. Using proper case, type the advisor’s last and first name in the spaces provided, using the % as a wildcard as needed, then press the F8 key to execute the search/query. Remember that Banner only recognizes legal names.
   d. Double-click on the ID of the correct advisor from this screen, and it will appear on the main SGAADVR screen.

7. Tab to the Advisor Type field and enter or search for the advisor type code (ex: MAJR is the type for the primary major advisor).

8. If the new advisor is the student’s primary advisor, check the Primary Indicator box for the new advisor. Note that you can only have one advisor checked as primary at one time, so if another advisor is already checked as primary, you will need to first uncheck that advisor as primary, then check the new advisor as primary. **One advisor MUST be primary if any are listed.**

9. Save your changes.

10. Now check the **To Term** in the Advisor Information block. If it’s 999999, skip to step #14. If it’s anything else (like the example below), you have more work to do.
11. Record the term code from the To Term field. In the example above, it’s 201760.

12. Rollback to the key block and enter this term code in the key block.

13. Repeat all steps above, starting from step #2.

14. Rollback to the key block, leaving the term the same, then click the Next Block button to verify your changes saved correctly.

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Remove an existing advisor when NO other advisor relationships exist

1. Enter the student ID and the effective (from) term in the key block.

2. Click the Next Block button to the Advisor Information block.

3. If the Maintenance icon is grayed out, you can proceed to step #6 below.

4. If the Maintenance icon is yellow/highlighted (as in the screenshot below), click it.
5. A pop-up box will appear – select *End Advisor*:

6. The advisor should still be displayed, but now the To Term will reflect the term in the key block, so the advisor is now shown as active for the student between the From Term and the To Term (the To Term is *not inclusive*).

7. Rollback to the key block, then immediately click the Next Block button. Check the *To Term* in the *Advisor Information* block. If it’s 999999 and your advisor has been deleted, you’re done. If the *To Term* is anything else (like the example below), you have more work to do.

8. Record the term code from the *To Term* field. In the example above, it’s *201720*. 

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*Updated February 14, 2017*
9. Rollback to the key block and enter this term code in the key block.

10. Click the Next Block button to the Advisor Information block. If the advisor you’re removing is gone from this list, you’re done. If not, click the link below that best matches what you see and follow the instructions, beginning at step #3:
   a. Remove an advisor that’s the only advisor in the list
   b. Remove an advisor when other advisor relationships exist

Remove an existing advisor when other advisor relationships exist

1. Enter the student ID and the effective (from) term in the key block.

2. Click the Next Block button to the Advisor Information block.

3. If the Maintenance icon is grayed out, you can proceed to step #6 below.

4. If the Maintenance icon is yellow/highlighted (as in the screenshot below), click it.
5. A pop-up box will appear – select Copy Advisor:

6. Select the row of the advisor you wish to delete and click the Remove Record button on the toolbar.

7. Exactly one advisor must have the Primary Indicator checked, so if the advisor you removed was primary, you must mark one of the remaining advisors as primary.

8. Save your changes.

9. Now check the To Term in the Advisor Information block. If it’s 999999, rollback to the key block, then click the Next Block button to verify your changes saved correctly. If it’s anything else (like the example below), you have more work to do.

10. Record the term code from the To Term field. In the example above, it’s 201760.

11. Rollback to the key block and enter this term code in the key block.
12. Click the Next Block button to the Advisor Information block. If the advisor you’re removing is gone from this list, you’re done. If not, click the link below that best matches what you see and follow the instructions, beginning at step #3:
   a. Remove an advisor that’s the only advisor in the list
   b. Remove an advisor when other advisor relationships exist