



YES Adviser User Guide

A guide to YES navigation for Advisers

October 8, 2015 version



VANDERBILT



Table of Contents

- Student Search 3
 - Save Search Parameters 4
 - Delete a Saved Search 5
- Search Results – Detail View 6
- Search Results – Action View 6
- Search Results – Roster View 7
 - Roster View – Print View 7
- Adviser Holds 8
 - Removing Adviser Holds 9
- Advising Snapshot 10

Student Search

1. Log into YES (Your Enrollment Services) yes.vanderbilt.edu.
2. Read and accept the Confidentiality Statement.

Confidentiality Statement

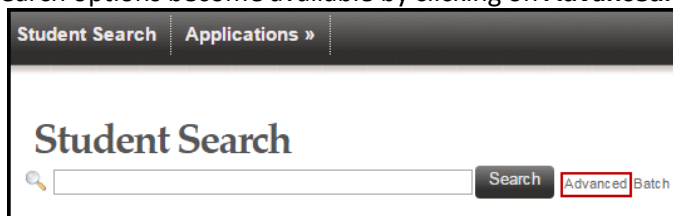
As a school official, you are authorized to access the academic records of students for whom you have an educational need-to-know. Your use of this application should be restricted accordingly. The data you will be viewing contains information protected by the Family Educational Rights and Privacy Act (commonly known as FERPA or the Buckley Amendment). FERPA requires that you maintain the confidentiality of all student records, and that no information from the records be released to a third party without the written permission of the student. When viewing student information, be sure that no other student or outside party can view or access this information.

To prevent unauthorized use of the protected information contained in this application, it is important that you protect the security of your e-password and not share your password with anyone.

All third-party requests you receive for student enrollment verifications, degree verifications, and other student records information should be directed to the Office of the University Registrar.

By clicking Accept, you are accepting responsibility for maintaining the confidentiality of the information within this application.

3. Quick Search: Search for the student using last name, first name.
 - a. Additional search options become available by clicking on **Advanced**.



The screenshot shows the 'Student Search' application interface. At the top, there are two tabs: 'Student Search' and 'Applications >'. Below the tabs is a large search bar with a magnifying glass icon on the left. To the right of the search bar are three buttons: 'Search', 'Advanced', and 'Batch'. The 'Advanced' button is highlighted with a red rectangular box.

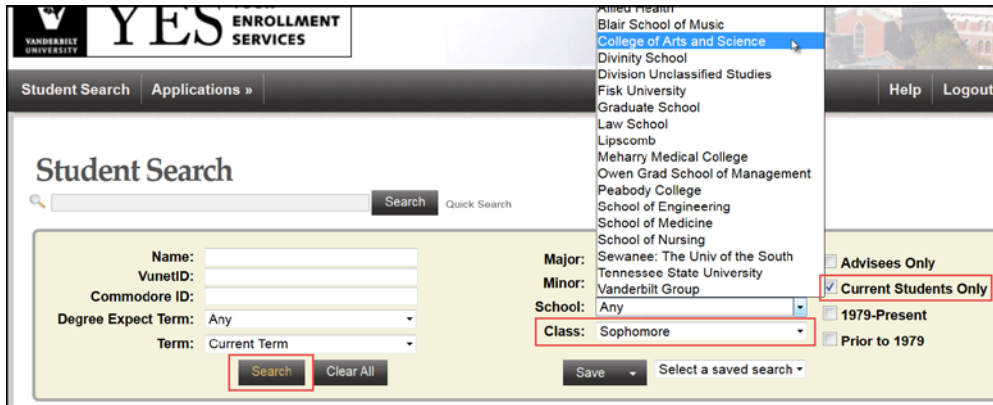
4. Advanced Search: Search for student(s) using any of the criteria listed below.

Name:	<input type="text"/>	Major:	Any	<input type="checkbox"/>	Advisees Only
VunetID:	<input type="text"/>	Minor:	Any	<input type="checkbox"/>	Current Students Only
Commodore ID:	<input type="text"/>	School:	Any	<input type="checkbox"/>	1979-Present
Degree Expect Term:	Any	Class:	Any	<input type="checkbox"/>	Prior to 1979
Term:	Current Term				

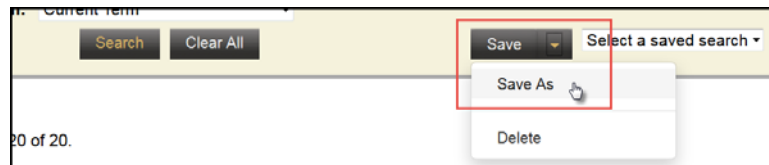
Save Search Parameters

If you tend to search for the same grouping(s) of students on a regular basis (e.g., current sophomores in the College of Arts and Science), you can save the search and return to it as needed.

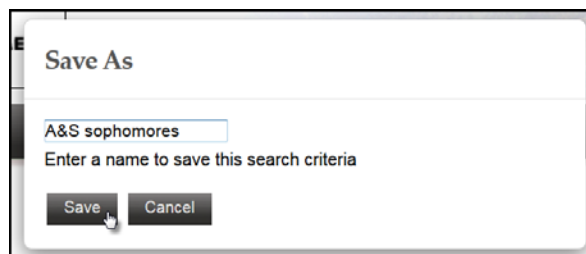
1. Enter your search parameters and click search.



2. When the results are returned, click Save, then Save As.

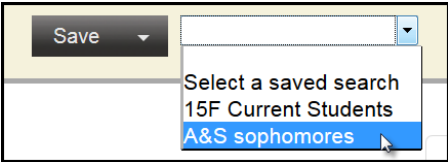


3. Enter a name for the search and click Save.

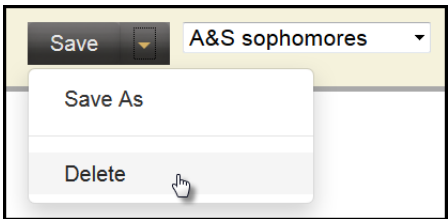


Delete a Saved Search

1. Select the saved search from the drop-down menu.



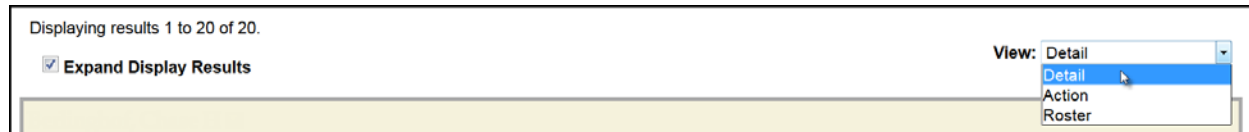
2. Click Save, then Delete.




Search Results – Detail View

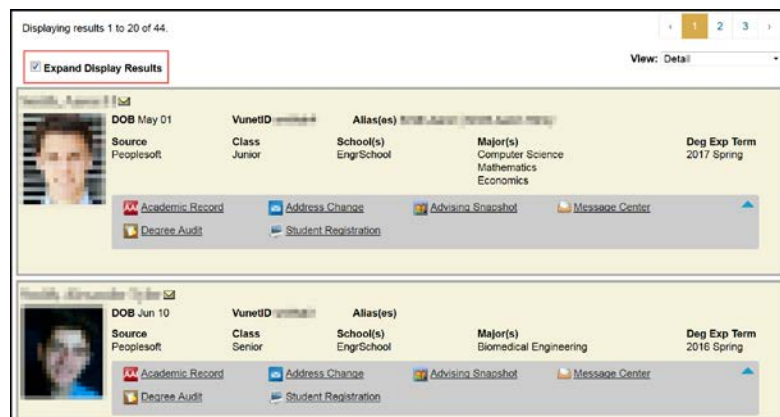
The detail view includes basic bio-demographic/academic information such as Name, VUNetID, Date of Birth, Class, School, Major, and Degree Expect Term.

1. Select Detail from the View drop-down menu.



Several applications are listed, but you will be able to access only the applications for which security access has been granted.

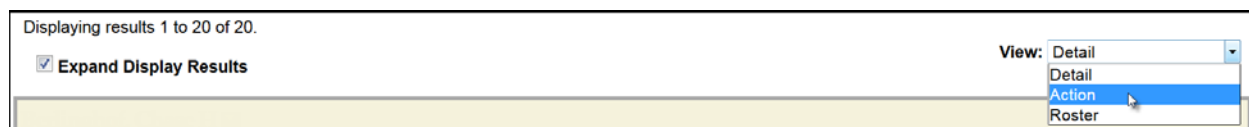
You may need to click on the  icon to view all applications, or check the Expand Display Results box to see all applications for all students in the search results.



Search Results – Action View

Action view allows you to take action in the Message Center on multiple students at the same time.

1. Select Action from the View drop-down menu.

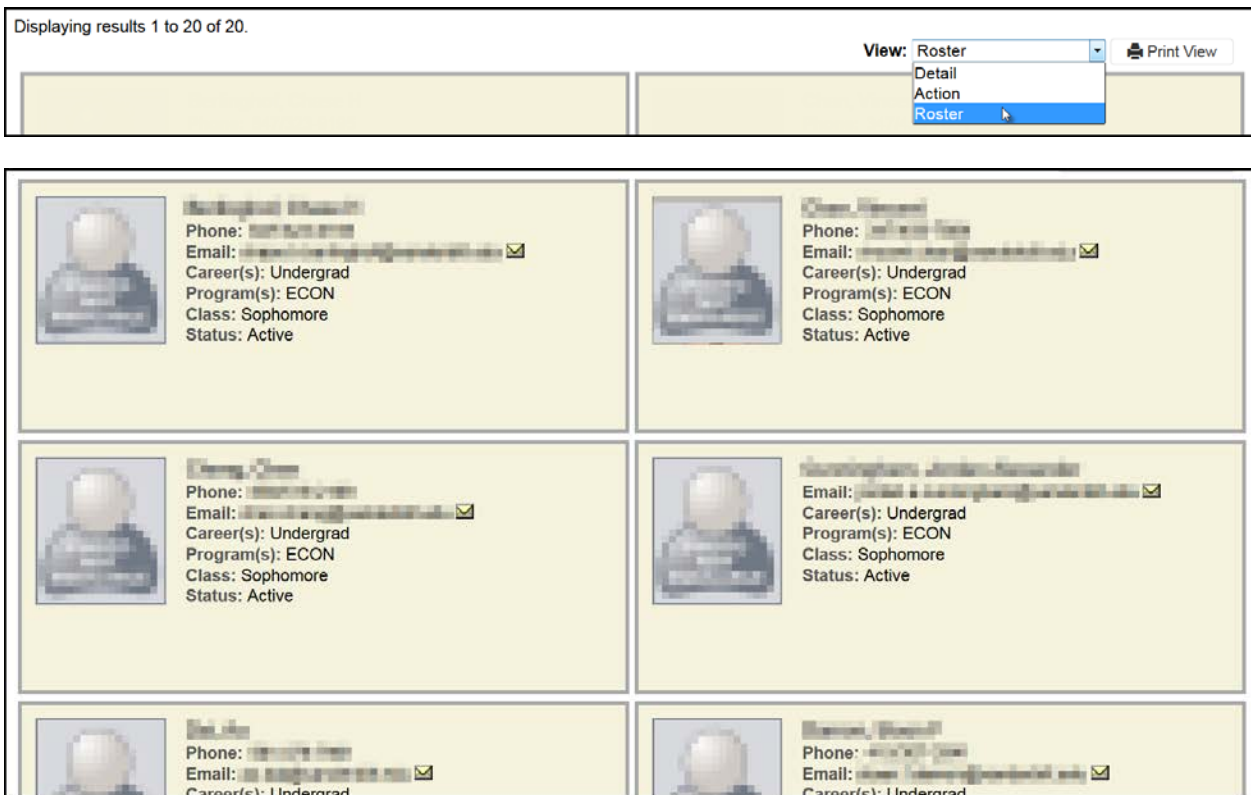


For more information on the Message Center, see the [User Guide](#).


Search Results – Roster View

The Roster View provides quick-glance information about each student including phone number, email address, career, major, class, status (e.g., active, leave of absence). For graduate and professional students, prior institutions and degrees also are listed.







1. Select Roster from the View drop-down menu.



Displaying results 1 to 20 of 20.

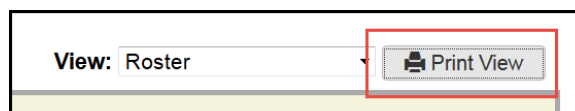
View: Roster 


Detail
Action
Roster

 <p>Student Name Phone: (615) 528-1234 Email: student@vanderbilt.edu ✓ Career(s): Undergrad Program(s): ECON Class: Sophomore Status: Active</p>	 <p>Student Name Phone: (615) 528-1234 Email: student@vanderbilt.edu ✓ Career(s): Undergrad Program(s): ECON Class: Sophomore Status: Active</p>
 <p>Student Name Phone: (615) 528-1234 Email: student@vanderbilt.edu ✓ Career(s): Undergrad Program(s): ECON Class: Sophomore Status: Active</p>	 <p>Student Name Email: student@vanderbilt.edu ✓ Career(s): Undergrad Program(s): ECON Class: Sophomore Status: Active</p>
 <p>Student Name Phone: (615) 528-1234 Email: student@vanderbilt.edu ✓ Career(s): Undergrad</p>	 <p>Student Name Phone: (615) 528-1234 Email: student@vanderbilt.edu ✓ Career(s): Undergrad</p>

Roster View – Print View

1. Click on the Print View icon.



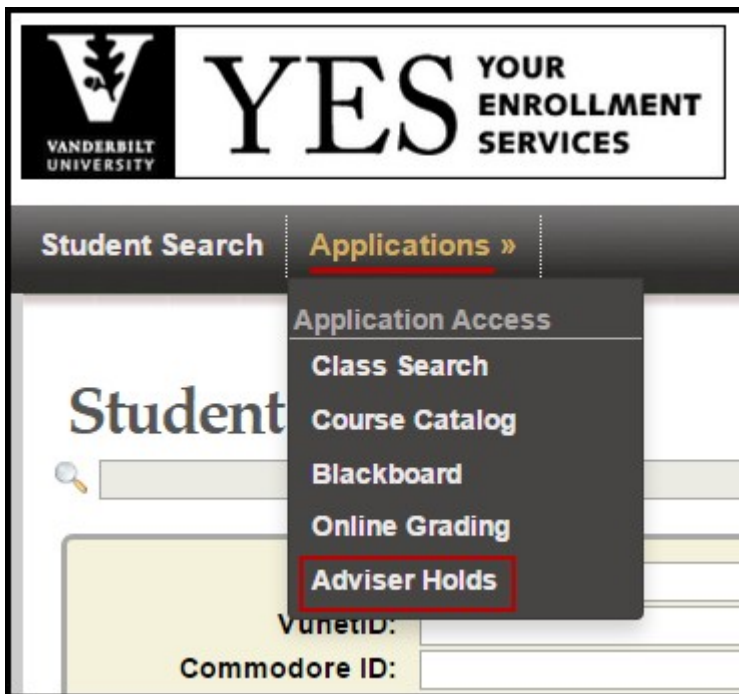
View: Roster  Print View



2. Follow the prompts for printing.

Adviser Holds

The Adviser Holds application allows you to take action on individual advisees or on multiple advisees at once.

1. Click on **Applications** and select **Adviser Holds** to remove a student’s advising hold.

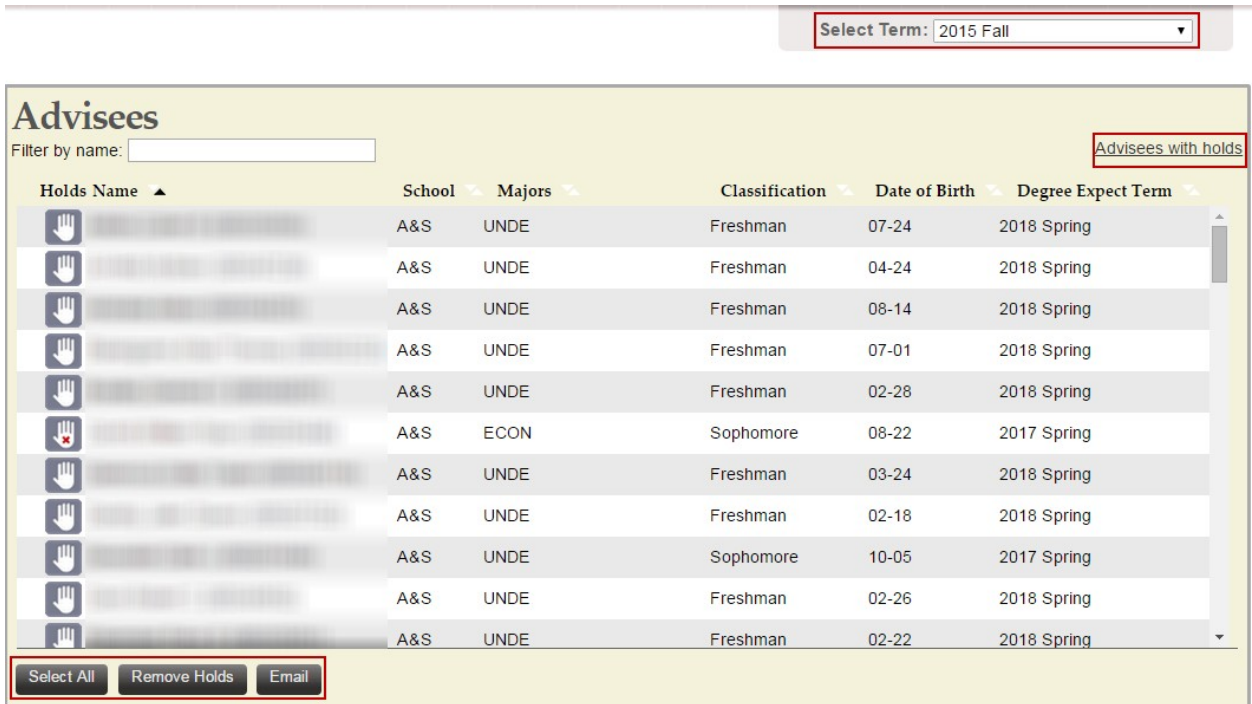


2. A list of all advisees will appear. Each student should have the following icon to the left of their name: Released hold  or Active Hold .
3. In general, only the student’s primary adviser can release adviser approval holds.

	[Redacted]	A&S	UNDE	Freshman	02-28	2018 Spring
	[Redacted]	A&S	ECON	Sophomore	08-22	2017 Spring

Removing Adviser Holds

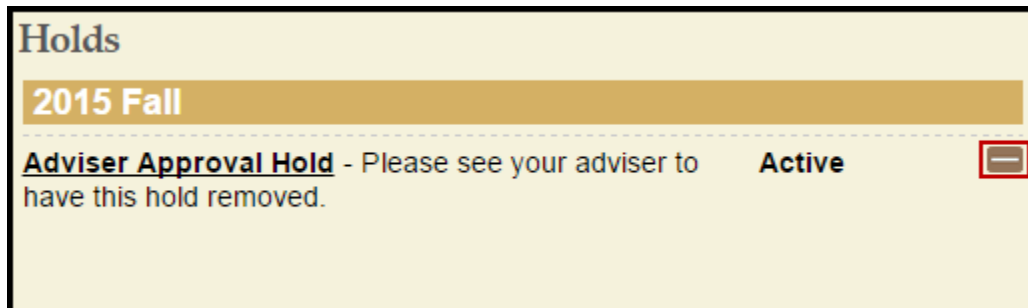
1. Select the appropriate term by clicking the drop down box on the top left side.
2. To view only the students with holds, click on **Advisees with holds**.



The screenshot shows the 'Advisees' section of the Adviser interface. At the top right, there is a 'Select Term' dropdown menu set to '2015 Fall'. Below this is a search bar labeled 'Filter by name:'. To the right of the search bar is a link labeled 'Advisees with holds'. The main area contains a table with the following columns: Holds Name, School, Majors, Classification, Date of Birth, and Degree Expect Term. The table lists 12 students. The 6th student has a red 'x' icon next to their name, indicating a hold. At the bottom of the table, there are three buttons: 'Select All', 'Remove Holds', and 'Email'.

Holds Name	School	Majors	Classification	Date of Birth	Degree Expect Term
[Hand Icon]	A&S	UNDE	Freshman	07-24	2018 Spring
[Hand Icon]	A&S	UNDE	Freshman	04-24	2018 Spring
[Hand Icon]	A&S	UNDE	Freshman	08-14	2018 Spring
[Hand Icon]	A&S	UNDE	Freshman	07-01	2018 Spring
[Hand Icon]	A&S	UNDE	Freshman	02-28	2018 Spring
[Hand Icon]	A&S	ECON	Sophomore	08-22	2017 Spring
[Hand Icon]	A&S	UNDE	Freshman	03-24	2018 Spring
[Hand Icon]	A&S	UNDE	Freshman	02-18	2018 Spring
[Hand Icon]	A&S	UNDE	Sophomore	10-05	2017 Spring
[Hand Icon]	A&S	UNDE	Freshman	02-26	2018 Spring
[Hand Icon]	A&S	UNDE	Freshman	02-22	2018 Spring

3. To release a hold for an individual student click on the student's name
4. The Advising Snapshot page will appear. Navigate to the Holds area and click on the minus sign.



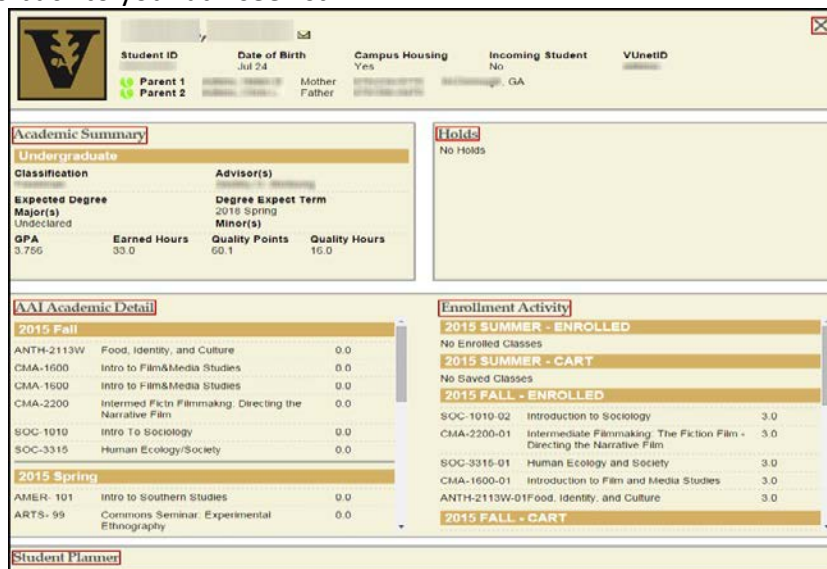
The screenshot shows the 'Holds' section of the Advising Snapshot page. At the top, there is a dropdown menu for the term, currently set to '2015 Fall'. Below this, there is a list of holds. The first hold is an 'Adviser Approval Hold' with the description 'Please see your adviser to have this hold removed.' The status of the hold is 'Active'. To the right of the status is a minus sign icon, which is highlighted with a red box.

Advising Snapshot

1. Clicking on a student's name in the Advising Holds application will direct you to the Advising Snapshot page. You can also access the Advising Snapshot page from the Student Search results:

Source Peoplesoft	Class Junior	School(s) A&S	Major(s) Economics	Deg Exp Term 2016 Spring
AAI Academic Record	Address Change	Advising Snapshot		Degree Audit

2. At the top of your screen, you will see the student's photo and additional bio-demographic detail.
3. The Advising Snapshot provides academic information that will assist with advisement.
 - a. The Academic Summary - Displays academic information such as GPA, Major, Degree Expect Term, etc.
 - b. Holds - Displays advising holds on a student's record and allows you to release an active Adviser Approval hold.
 - c. AAI Academic Detail - Displays the student's enrollments, including grades and credit hours.
 - d. Enrollment Activity - Displays what the student is registered for and what they have in their cart.
 - e. Student Planner - Displays all the courses in the student's planner, as well as any tags the student may have added to courses within their planner.
- If you navigated to the Advising Snapshot from the Adviser Holds application, click on the to go back to your advisee list.



The screenshot displays the Advising Snapshot interface for a student. At the top, there is a header with the student's photo and basic information: Student ID, Date of Birth (Jul 24), Campus Housing (Yes), Incoming Student (No), and VUnetID. Below this, there are two columns of information. The left column includes 'Academic Summary' with details on Undergraduate Classification, Expected Degree (Undeclared), Major(s), GPA (3.756), Earned Hours (33.0), Quality Points (60.1), and Quality Hours (16.0). The right column shows 'Holds' with 'No Holds'. Below these are 'AAI Academic Detail' and 'Enrollment Activity'. The AAI Academic Detail section lists courses for 2015 Fall and 2015 Spring. The Enrollment Activity section lists courses for 2015 Summer - Enrolled, 2015 Summer - Cart, 2015 Fall - Enrolled, and 2015 Fall - Cart. At the bottom, there is a 'Student Planner' section.