



# JOB AID

## Bulk Advisor Assignment

*09/01/2025*





## Bulk Advisor Assignment: Grad

If you are interested in having the Bulk Advisor Assignment role in SIS, you must meet with the Grad SIS team to discuss the role and the process before requesting access. Please reach out to [gradsis@grd.msu.edu](mailto:gradsis@grd.msu.edu) to schedule a meeting. Access requests for the role will only be approved by the Graduate School if you have received instruction on how to perform the Bulk Advisor Assignment tasks and have a legitimate need for the role.

1. How to bulk assign a **single advisor** for a **group of students in one academic plan**, who all have the **same admit term** and who **do not currently have an advisor**:

**All students in the chosen population (same program, same plan, same admit term, currently no advisor) will have the same, single advisor assigned.**

- Run the following query in the Graduate Reporting Center:  
MSU\_GR\_GRAD\_STUDENTS\_LIST to find the students in the academic plan code you wish to bulk assign advisors.
- Export the results of MSU\_GR\_GRAD\_STUDENTS\_LIST to an Excel Spreadsheet
- Filter the results by Admit Term
- The resulting students will be the population who will get the new advisor bulk assigned

Records and Enrollment > Student Background Information > Student Advisor Assignment

### Student Advisor Assignment

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches | Saved Searches: Choose from saved searches

Academic Institution: begins with [ ]  
Academic Career: [ ]  
Assignment Code: begins with [ ]

Show fewer options

Search Clear

- Academic Institution: MSU55
- Academic Career: Graduate
- Search will show you any jobs you have saved previously
- To add a new job click +Add a New Value and type in the name of the job you want to create in the Assignment Code Field (examples: Fall 2025 Cohort, BSADEL\_MBA2255, etc.)
- Click Add on the Add a New Value page

How to fill out the Student Advisor Assignment tabs (Setup, Advisor, Student)



**Details**

\*Description  Usage

\*Status

Mode

Select Advisors By

Distribute Advisors By

Select Students By

Assign Student Advisors At

**Selection Parameters**

Academic Program

Academic Plan

Academic Sub-Plan

**Additional Parameters**

Admit Term

☐ Multiple Academic Career

**Student Advisor Details**

\*Advisor Role

Advisor Percentage

☐ Must Approve Enrollment

☐ Must Approve Graduation

Save Notify Add Update/Display

Setup | Advisor | Student

Default page set up. Modifications will be needed.

## Setup Tab

- Details Section
  - Description:** Add a description for the job (Example: FS25 CMPTRS\_PHD, SS26 Cohort, etc.)
  - Status:** Active
  - Mode:** Assign
  - Select Advisors By:** Manual
  - Distribute Advisors By:** Single
  - Select Students By:** Career/Prog/Plan/SubPlan
  - Assign Students At:** Program/Plan
  - Usage:** Batch
- Selection Parameters Section
  - Academic Program:** Add the academic program (examples: MBUS, DAL, MEGR, DNS, etc.)
  - Academic Plan:** Add the academic plan code the students are in where you are assigning the advisor (examples: STEM\_MBA, ENGLIS\_PHD, CMPTRSC\_MS, PHYSIC\_PHD, etc.)
  - Academic Sub-Plan:** Leave blank
- Additional Parameters Section
  - Admit Term:** Add the admit term for the group of students for whom you are bulk assigning the advisor (2258, 2262, 2265, etc.)
- Student Advisor Details Section
  - Advisor Role:** Advisor
  - Advisor Percentage:** Leave blank
- Click Save

## Advisor Tab

**Details**

Personalize Find View All First 1 of 1 Last

Academic Program	Empl ID	Display Name	Look up Advisor	Academic Plan	Letter Group From	Letter Group To
1						



- Academic Program: Add the Academic Program the Academic Plan is in. (examples: MBUS, DAL, MEGR, DNS, etc.)
- Look up Advisor: Click on the magnifying glass, enter the advisor's first and last name and click Lookup. When you have located the advisor, click Select

- Academic Plan: Add the academic plan code the students are in where you are assigning the advisor (examples: STEM\_MBA, ENGLIS\_PHD, CMPTRSC\_MS, PHYSIC\_PHD, etc.)
- Letter Group From and Letter Group To: Leave Blank
- Click Save

### **Student Tab**

- Click Get Students

Get Students

- The list of applicable students appears
- Click Assign Advisors

Assign Advisors

- Click OK in the message box

### **After advisor has been assigned**

- Back out of the Graduate Reporting Center entirely. Wait a few minutes.
- Go back to the Graduate Reporting Center and run MSU\_GR\_GRAD\_STUDENTS\_LIST
- Export the results to an Excel Spreadsheet
- Filter the query by the Admit Term and/or advisor to see the students who had the advisor bulk assigned. Your results should show the single advisor assigned to all of the students who met the criteria for the bulk assignment process you ran previously.



2. How to bulk **assign multiple advisors (split alphabetically [example: AA-MZ get one advisor, NA-ZZ get a different advisor])** to a **specific group of students in one academic plan**, who all have the **same admit term** and who **do not currently have an advisor**.

All students in the chosen population (same program, same plan, same admit term, currently no advisor) will have a specific advisor assigned based on where the student falls alphabetically.

- Run the following query in the Graduate Reporting Center:  
MSU\_GR\_GRAD\_STUDENTS\_LIST to find the students in the academic plan code you wish to bulk assign advisors.
- Export the results of MSU\_GR\_GRAD\_STUDENTS\_LIST to an Excel Spreadsheet
- Filter the results by Admit Term
- The resulting students will be the population who will get the new advisor bulk assigned

## Records and Enrollment > Student Background Information > Student Advisor Assignment

### Student Advisor Assignment

- Academic Institution: MSU55
- Academic Career: Graduate
- Search will show you any jobs you have saved previously
- To add a new job click +Add a New Value and type in the name of the job you want to create in the Assignment Code Field (examples: Fall 2025 Cohort, BSADEL\_MBA2255, etc.)
- Click Add on the Add a New Value page

How to fill out the Student Advisor Assignment tabs (Setup, Advisor, Student)

### Setup Tab

- Details Section
  - **Description:** Add a description for the job
  - **Status:** Active
  - **Mode:** Assign
  - **Select Advisors By:** Manual
  - **Distribute Advisors By:** Letter Group
  - **Select Students By:** Career/Prog/Plan/SubPlan
  - **Assign Students At:** Program/Plan



- **Usage:** Page/Batch (Both)
- Selection Parameters Section
  - **Academic Program:** Add the academic program (examples: MBUS, DAL, MEGR, DNS, etc.)
  - **Academic Plan:** Add the academic plan code the students are in where you are assigning the advisor (examples: STEM\_MBA, ENGLIS\_PHD, CMPTRSC\_MS, PHYSIC\_PHD, etc.)
  - **Academic Sub-Plan:** Leave blank
- Additional Parameters Section
  - **Admit Term:** Add the admit term for the group of students you are bulk assigning the advisor
- Student Advisor Details Section
  - **Advisor Role:** Advisor
  - **Advisor Percentage:** Leave blank
- Click Save

### Advisor Tab

- Academic Program: Add the Academic Program the Academic Plan is in. (examples: MBUS, DAL, MEGR, DNS, etc.)
- Look up Advisor: Click on the magnifying glass, enter the advisor's first and last name and click Lookup. When you have located the advisor, click Select

- Fill in the Letter Group From and Letter Group To fields. (example: Advisor 1 will be assigned to students who fall alphabetically between AA and MZ. Advisor 2 will be assigned to students who fall alphabetically between NA and ZZ.)

Letter Group From	Letter Group To
<input type="text"/>	<input type="text"/>

- Academic Plan: Add the academic plan code the students are in where you are assigning the advisor (examples: STEM\_MBA, ENGLIS\_PHD, CMPTRSC\_MS, PHYSIC\_PHD, etc.)
- Add the second advisor and fill in the letter groups.
- Click Save



### Student Tab

- Click Get Students

Get Students

- The list of applicable students appears
- Click Assign Advisors

Assign Advisors

- Click OK in the message box

Message

Assign Advisors to the Student population? (0,-1)

OK Cancel

### **After the advisors are assigned**

- Back out of the Graduate Reporting Center entirely. Wait a few minutes.
- Go back to the Graduate Reporting Center and run MSU\_GR\_GRAD\_STUDENTS\_LIST
- Export the results to an Excel Spreadsheet
- Filter the query by the Admit Term and/or advisors for the students who had the advisors bulk assigned. Your results should show the multiple advisors assigned to the students who met the criteria for the bulk assignment process you ran previously. The advisors will be assigned by the letter groups.

- How to bulk assign a **single advisor** to a **list of specific students in one academic plan**, who **do not currently have an advisor using files**. (This process would be used for students with different admit terms but are still in the same academic plan.)

**Files are to be CSV files. All fields must be included in the file with blanks for fields not being used.**

### Advisor file

Fields: EMPLID, PROGRAM, PLAN, SUBPLAN, LETTER\_GROUP\_START, LG\_END

Example: Program and Plan, no letter group  
"123456789", "MBUS", "BSADEL\_MBA", "", "", ""

File name: Advisor File

Save as type: CSV (Comma delimited)

123456789	MBUS	BSADEL_MBA	"	"	"
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## Student file

Fields: EMPLID, PROGRAM, PLAN

Example: Program and Plan (No sub-plan and no letter group)

"198765432", "MBUS", "HLTHCRM\_MS", ",", "

File name:	Student File			
Save as type:	CSV (Comma delimited)			
198765432	MBUS	HLTHCRM_MS	"	"

Records and Enrollment > Student Background Information > Student Advisor Assignment

## Student Advisor Assignment

Find an Existing Value

+ Add a New Value

### ▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches	Choose from recent searches	✎	Saved Searches	Choose from saved searches	✎
Academic Institution:	begins with	<input type="text"/>			
Academic Career:	=	<input type="text"/>			
Assignment Code:	begins with	<input type="text"/>			
<a href="#">^ Show fewer options</a>					
Search		Clear			

- Academic Institution: MSU55
- Academic Career: Graduate
- Search will show you any jobs you have saved previously
- To add a new job click +Add a New Value and type in the name of the job you want to create in the Assignment Code Field (examples: ACCOUNT\_MS Cohorts, Smith advisees, etc.)
- Click Add on the Add a New Value page

How to fill out the Student Advisor Assignment tabs (Setup, Advisor, Student)

## Setup Tab

- Details Section
  - **Description:** Add a description for the job
  - **Status:** Active
  - **Mode:** Assign
  - **Select Advisors By:** File (All)
  - **Distribute Advisors By:** Single
  - **Upload the CSV file with the advisor information**
  - **Select Students By:** File
  - **Assign Student Advisors At:** Program/Plan





- **Upload the CSV file with the student information**
- **Usage:** Batch
- Additional Parameters Section
  - **Admit Term:** Add the admit term for the group of students you are bulk assigning the advisor if they all have the same admit term. If there are multiple admit terms, leave the field blank.
- Student Advisor Details Section
  - **Advisor Role:** Advisor
  - **Advisor Percentage:** Leave blank
- Click Save

#### **Advisor Tab**

- Click Get Advisors (this will find the advisor you listed in the CSV file)
- Do not Click Save

#### **Student Tab**

- Click Get Students (this will find the list of students from the CSV file)
- Click Assign Advisors

#### **After the advisor is assigned**

- Back out of the Graduate Reporting Center entirely. Wait a few minutes.
- Go back to the Graduate Reporting Center and run MSU\_GR\_GRAD\_STUDENTS\_LIST
- Export the results to an Excel Spreadsheet
- Filter the query by the Admit Term(s) and/or Advisor for the students who had the advisor bulk assigned. Your results should show the specific advisor assigned to all of the specific students on the list you included in the CSV file.

Questions? Please reach out to [gradsis@grd.msu.edu](mailto:gradsis@grd.msu.edu).