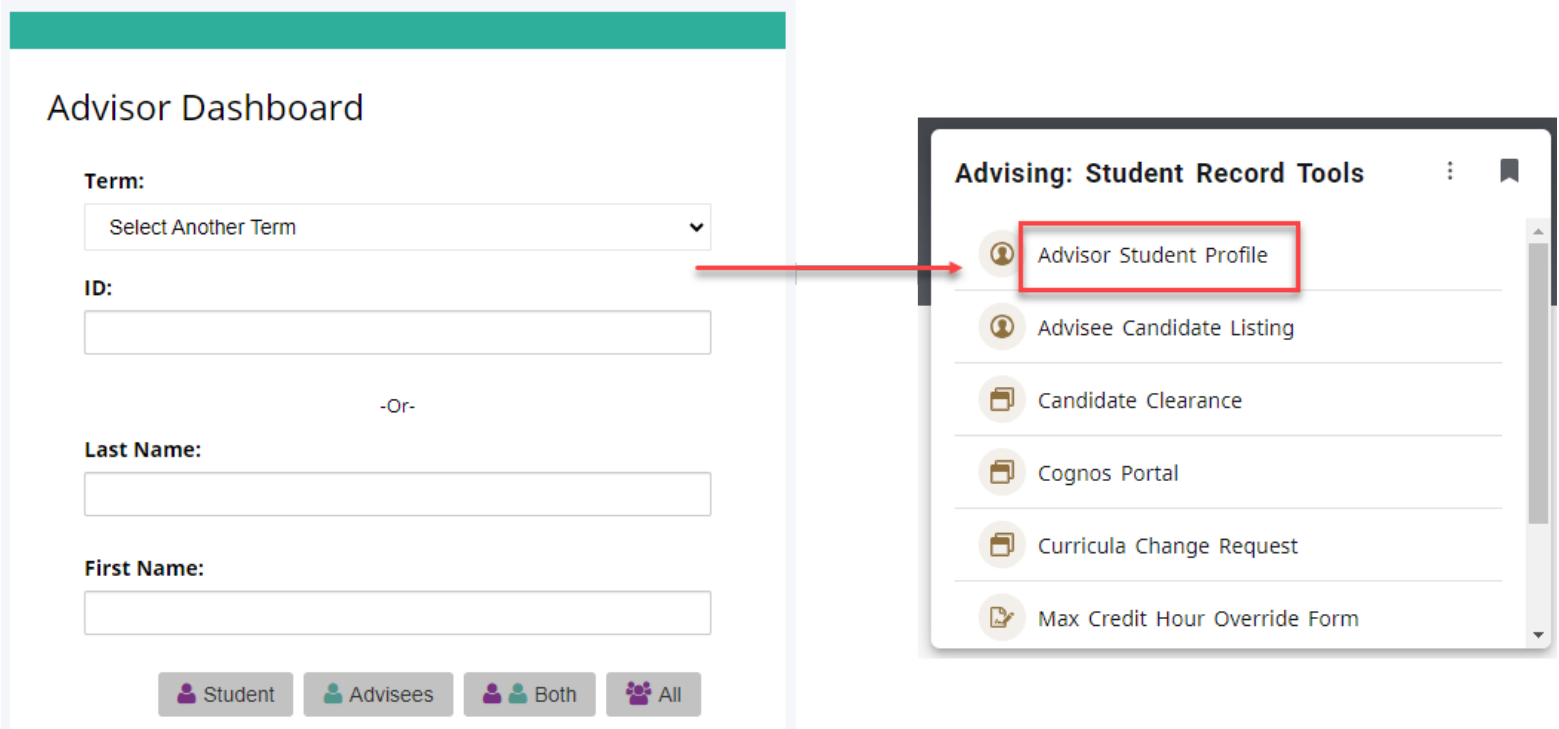
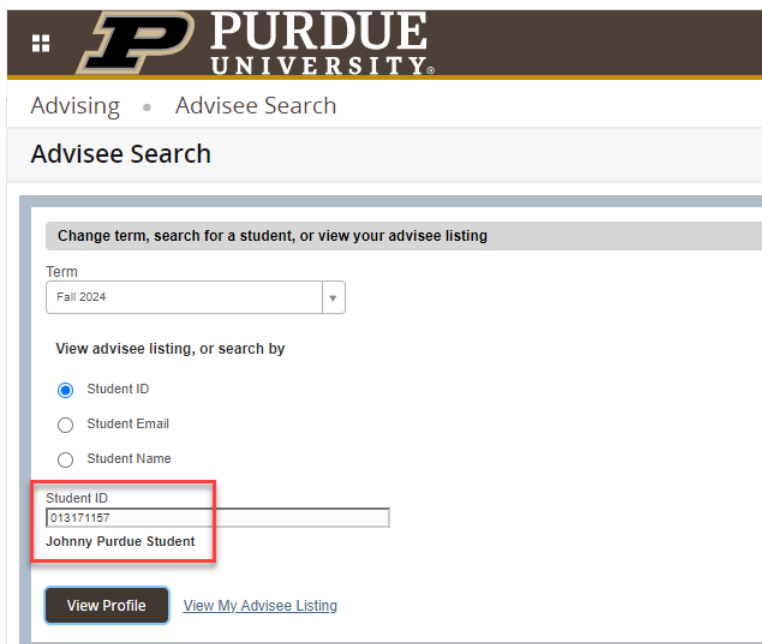


Advisor User Experience in Upgraded myPurdue Portal

1. The former Advisor Dashboard portlet is no longer available in the upgraded myPurdue portal. All the tasks associated with this dashboard are now available on the Advisor Student Profile located on the Advising: Student Record Tools card. The Advisor Student Profile can be found in the upgraded portal on the Advising: Student Record Tools card as shown below.



- a. Below outlines the key navigation to find items in the Advisor Student Profile.
 - i. Upon clicking on the Advisor Student Profile link, the user will be taken to the new student profile page. The initial page is a student look up screen where the user will select the term and then enter either the student ID, email or name and hit enter or tab to search for the student.
 1. Searching by PUID, select the Student ID radio button, enter the PUID of the student in the Student ID field and click tab or enter. Then click on View Profile to see the student's information.



2. Searching by name, select the Student Name radio button and start typing the name of the student in the Student Name field. As you begin typing potential matches will start to appear. When you find your student click on the name to populate the field. Then click on View Profile to see the student's information.

PURDUE UNIVERSITY

Advising • Advisee Search

Advisee Search

Change term, search for a student, or view your advisee listing

Term
Fall 2024

View advisee listing, or search by

Student ID
 Student Email
 Student Name

Student Name
Search

To search for a student enter their name: Last, First Middle e.g. Smith, John Martin

student, john

Johnny Purdue Student
ID: 013171157
Email: lbeals@purdue.edu

My student isn't listed
Select this to search all terms

3. Searching by email, select the Student Email radio button and enter the student's email in the Student Email field and click tab or enter. If your student is found they will appear under the field. Then click View Profile to see the student's information.

PURDUE UNIVERSITY

Advising • Advisee Search

Advisee Search

Change term, search for a student, or view your advisee listing

Term
Fall 2024

View advisee listing, or search by

Student ID
 Student Email
 Student Name

Student Email
cmarhein@purdue.edu
Christina A Marheine

[View Profile](#) [View My Advisee Listing](#)

- ii. To see a listing of all students that are assigned to you as an advisor click on the View My Advisee Listing link. This will show you all students assigned to you for the term selected. From this list you can click on an individual student which will take you to that student's profile.

| Name and ID | Program | Primary Major | Academic Standing | Student Status | Student Type | Advisor Holds | Primary Advisor | Advisor Type | Campus |
|---|---------------------------|------------------------|-------------------------|----------------|--------------|---------------|-----------------|------------------|-----------------|
| Student: Imogene Eugenia 013181330 View Profile | Accounting-BS | Accounting | Continued Good Standing | Active | Continuing | | | Academic Advisor | West Lafayette |
| Student: Johnny Purdue 013171157 View Profile | Biomed Engr-IUPUI Plan... | Biomedical Engineering | Continued Good Standing | Active | Continuing | | | Academic Advisor | Indianapolis at |

- iii. In the Advisor Student Profile you will see many details about the selected student. This includes basic demographic data, curricula information, current registration, existing graduation application(s), assigned advisor(s) and test scores. There are additional links located on the left side of the page that will take you to the students degree audit and plan in Degree Works or EduNav, the academic transcript, etc.

Term: Fall 2024 | Standing: Continued Good Standing, as of Fall 2022 | Overall Hours: 94 | Overall GPA: 3.35 | Registration Notices: 4 | Holds: 1

Bio Information
 Email: lbeals@purdue.edu
 Phone: Not Provided
 Gender: Male
 Date of Birth: 06/07
 Ethnicity: Not Provided
 Race: Not Provided
 Citizen: No
 Citizenship: Other
 Student: Coleen
 Emergency Contact: 1 317 555

General Information
 Level: Undergraduate
 Class: Senior 90 - 104 hours
 Status: Active
 Student Type: Continuing
 Residency: Resident
 Campus: Indianapolis and W Lafayette
 First Term Attended: Spring 1982
 Matriculated Term: Not Provided
 Last Term Attended: Summer 2023
 Leave of Absence: Not Provided

Graduation Information
 Graduation Applications: Active(1)

Advisors
 Primary / Academic Advisor: Ryan C Jones
 Academic Advisor: Lynee G Horngren
 Academic Advisor: Jo Yang-Sun Jones
 Academic Advisor: Christina R King
 Academic Advisor: Julie A Limer Schwaller
 Academic Advisor: Christina A Marheine
 Academic Advisor: Frank Julian Robinson
 Academic Advisor: Jennifer R Sibray

CURRICULUM, HOURS & GPA

| Primary | Secondary | Hours & GPA |
|----------------|--------------|------------------------------|
| Degree: | Not Provided | BS in Biomedical Engineering |
| Study Path: | Not Provided | Undergraduate |
| Level: | Not Provided | Biomed Engr-IUPUI Plan-BSE |
| Program: | Not Provided | School of Biomedical Engr |
| College: | Not Provided | Biomedical Engineering |
| Major: | Not Provided | Not Provided |
| Department: | Not Provided | Not Provided |
| Concentration: | Not Provided | Not Provided |
| Minor: | Not Provided | Not Provided |
| Admit Type: | Not Provided | Fall 2024 |
| Admit Term: | Not Provided | Fall 2024 |
| Catalog Term: | Not Provided | Fall 2024 |

REGISTERED COURSES
 Not Registered

Total Hours | Registered Hours: 0 | Billing Hours: 0 | CEU Hours: 0 | Min Hours: 0 | Max Hours: 18

- iv. In the upper right hand corner of the student profile you can see the registration notices as well as any holds that may exist on the student's record. These notifications are noted in red and the details can be seen by clicking on each item.

Registration Notices: 4 | Holds: 1

- Overall Academic Standing
Good Standing
Permits Registration
- Student Status
Active
Permits Registration
- Enrollment Status
Permits Registration
- Time Tickets
From: 03/18/2024 10:15 AM
To: 03/18/2024 11:59 PM
From: 03/19/2024 12:00 AM
To: 12/14/2024 11:59 PM

Registration Notices: 4 | Holds: 1

No Direct Deposit auth on file

Originator: WL Bursar's Office
 From Date: 03/16/2021
 To Date: 12/31/2099
 Reason: Enroll on Bills & Payments Tab

- v. To complete another student search simply click on the Advisee Search link in the menu tree at the top of the student profile page.

Advising • Advisee Search • Student Profile

Student Profile - Johnny Purdue Student (013171157)

Term: Fall 2024

Bio Information
 Email:
 Phone:

2. A new link on the Advising: Help & Resources card called My Personal Info replaces the former Name Change link. This link provides the individual user a view of their personal information and the ability to provide a preferred name if they

choose. Users can view their name, gender, email, phone, address, emergency contact, race & ethnicity and Banner surveys.

Personal Information

Personal Details Edit

| | | |
|------------------------------------|----------------------------|--------------------------------|
| First Name [Redacted] | Middle Name A | Last Name [Redacted] |
| Date of Birth [Redacted] | Marital Status - | Legal Sex Female |
| Preferred First Name - | | |

Email Add New

WL Campus (Preferred)
cmarhein@purdue.edu

Phone Number Add New

There are no phone numbers available for you to view.

Address Add New

Permanent
Current
08/25/2022 - (No end date)
[Redacted]

Emergency Contact Add New

| | |
|------------|------------|
| [Redacted] | [Redacted] |
|------------|------------|

Additional Details

Ethnicity and Race
Not Hispanic or Latino
White

Other

Answer a Survey

- Other items in the upgraded portal that have a new look and feel are outlined below. The functionality of these items are unchanged.
 - Academic Transcript (on the Advising: Advisor Tools card)
- For advisors that have access to Administrative Banner, there is a card called Banner & Other Applications.

Banner & Other Applications

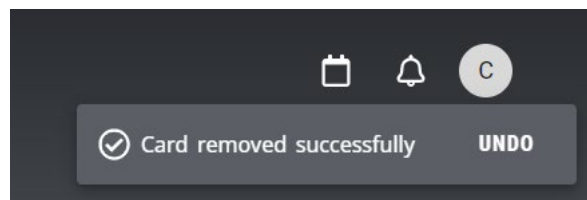
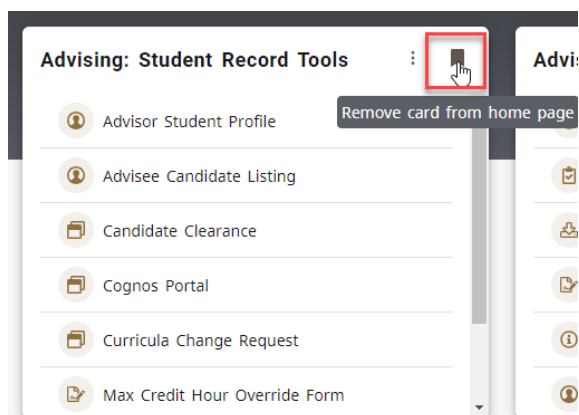
- Administrative Banner
- e-Print
- Unitime
- Workflow
- Staff Fee Remit
- Course Roster Download
- Student Customer Service

5. The chart below provides a crosswalk from the former myPurdue portal (first two columns) to the cards as they exist in the upgraded myPurdue portal (zoom in to better see the below)

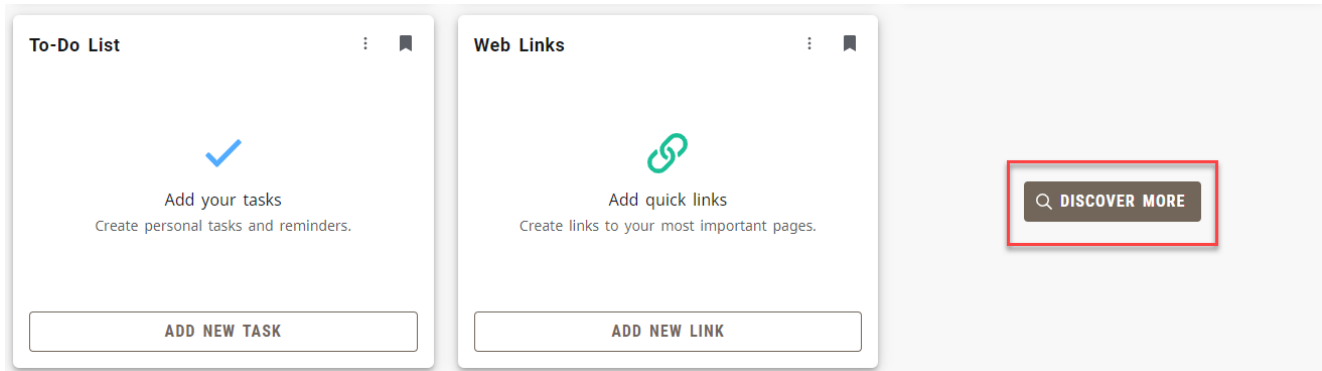
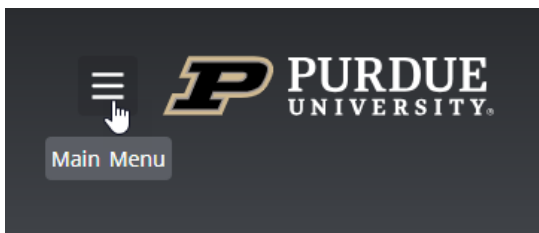
| FORMER myPurdue Portal | Former Name and Link | CURRENT Experience Card Name | Current Card Link Name | Comments |
|--------------------------|--|--------------------------------|---|----------|
| Advisor Dashboard | Select Term ID or Last Name | Advising: Student Record Tools | Advisor Student Profile | |
| | First Name | Advising: Student Record Tools | Advisor Student Profile | |
| | Addresses & Phones | Advising: Student Record Tools | Advisor Student Profile | |
| | Career Plan Survey | N/A | | |
| | Current Registration | Advising: Student Record Tools | Advisor Student Profile | |
| | Detail Schedule | Advising: Student Record Tools | Advisor Student Profile | |
| | HLA/Accommodation Letters | N/A | | |
| | Email Addresses | Advising: Student Record Tools | Advisor Student Profile | |
| | Emergency Contacts | N/A | | |
| | GED Survey | N/A | | |
| | Health Encumbrances | Advising: Student Record Tools | Advisor Student Profile | |
| | Initial Course Participation | Advising: Student Record Tools | Advisor Student Profile | |
| | Notice Survey | Advising: Student Record Tools | Advisor Intake Forms | |
| | Registration History | Advising: Student Record Tools | Advisor Student Profile | |
| | Registration PIN | Advising: Student Record Tools | Advisor Student Profile | |
| | Registration Status | Advising: Student Record Tools | Advisor Student Profile | |
| | Student Information Form | Advising: Student Record Tools | Advisor Intake Forms | |
| Student Record | Advising: Student Record Tools | Advisor Student Profile | | |
| Test Scores | Advising: Student Record Tools | Advisor Student Profile | | |
| Transcript | Advising: Student Record Tools | Advisor Student Profile | | |
| Week-at-a-Glance | Advising: Student Record Tools | Advisor Student Profile | | |
| Course Catalog Resources | University Catalog: Academic Programs & Requirements | Course Catalog Resources | University Catalog: Programs & Requirements | |
| | Course Catalog: Course Descriptions | Course Catalog Resources | Course Catalog Resources | |
| | Schedule of Classes | Course Catalog Resources | Schedule of Classes | |
| | Course Prerequisite Report | Course Catalog Resources | Course Prerequisite Report | |
| | Course Insights Syllabi Archives | Course Catalog Resources | Course Insights Syllabi Database | |
| | Sections Restriction Report | Course Catalog Resources | Sections Restriction Report | |
| | Course Insights Faculty Web Page Publishing Guide | Course Insights | Web Page Publishing Guide | |
| | Course Insights Faculty Syllabus Upload Guide | Course Insights | Syllabus Upload Guide | |
| | | | | |
| | | | | |
| Transfer Credit | Transfer Credit Course Equivalency Guide | Transfer Credit | Transfer Credit Course Equivalency Guide | |
| | Other Transfer Credit Information | Transfer Credit | Other Transfer Credit Information | |
| Advising Tools | Advisee Candidate Listing | Advising: Student Record Tools | Advisee Candidate Listing | |
| | Advisor Apply to Graduate FAQ | Advising: Help & Resources | Advisor Apply to Graduate FAQ | |
| | Advisor Crossing | Advising: Advisor Tools | Advisor Crossing | |
| | Address Listing | Advising: Student Record Tools | Advisor Student Profile | |
| | Brightspace | N/A | | |
| | BoilerConnect | Advising: Advisor Tools | BoilerConnect | |
| | Candidate Clearance | Advising: Student Record Tools | Candidate Clearance | |
| | Class Sitemap | N/A | | |
| | CODO Requirements | Advising: Help & Resources | CODO Requirements | |
| | Cognos Portal | Advising: Student Record Tools | Cognos Portal | |
| | Curricula Change Request | Advising: Student Record Tools | Curricula Change Request | |
| | Curricula Change Request Documentation | Advising: Help & Resources | Curricula Change Request Docs | |
| | EduNav and myPurduePlan Issue Log | Advising: Help & Resources | EduNav and myPurduePlan Issue Log | |
| | Grade Change Workflow | N/A | | |
| | myPurdue Page Screenshots | Advising: Help & Resources | myPurdue Page Screenshots | |
| | Name Change Info | Advising: Help & Resources | My Personal Info | |
| | Purdue Testing Center | N/A | | |
| | Registrar Calendars | Advising: Help & Resources | Registrar Calendars | |
| | Registrar Help Videos | Advising: Help & Resources | Registrar Help Videos | |
| | Registration Workflow System | Advising: Student Record Tools | Registration Workflow System | |
| | Request Student Data | Advising: Student Record Tools | Request Student Data | |
| | Student of Concern Reporting | Advising: Advisor Tools | Student of Concern Reporting | |
| | University Core Course Listing | Advising: Help & Resources | University Core Course Listing | |
| | Max Credit Hour Override Form | Advising: Student Record Tools | Max Credit Hours Override Form | |
| EduNav | Advising: Advisor Tools | | | |
| Degree Planning & Audit | Faculty Help & Resources | | | |
| | Classic myPurduePlan (Classic/old dashboard) | Advising: Advisor Tools | | |
| | myPurduePlan (New Responsive Dashboard) | Advising: Advisor Tools | | |
| Ready to Graduate? | How to Apply to Graduate | Advising: Help & Resources | Advisor Apply to Graduate FAQ | |
| | Student Apply to Graduate FAQ | Advising: Help & Resources | Advisor Apply to Graduate FAQ | |
| | View Graduation Application | Advising: Student Record Tools | Advisor Student Profile | |
| | Self Nomination Application for Student Responder | N/A | | |
| Registrar Forms | Form 23 - Drop/Add Form | Registrar Forms | Form 23 - Drop/Add Form | |
| | Form 29A - Advisor Schedule Recommendation | N/A | | |
| | Form 60 - Statement of Incomplete | Registrar Forms | Form 60 - Statement of Incomplete | |
| | Form 65 - Extended Incomplete Request | Registrar Forms | Form 65 - Extended Incomplete Request | |
| | Form 350 - Academic Record Change/Grade Change | Registrar Forms | Form 350 - Academic Record Change/Grade Change | |
| | Form 390 - Directed Credit Form | Registrar Forms | Form 390 - Directed Credit Form | |
| | Purdue University 10 Year Exception Authorization | Registrar Forms | Purdue University 10 Year Exception Authorization | |
| | Transfer Credit 10 Year Exceptions Authorization | Registrar Forms | Transfer Credit 10 Year Exceptions Authorization | |
| | Student Course Request Form | Registrar Forms | Student Course Request Form | |
| | UCC 10 Year Exception Authorization | Registrar Forms | UCC 10 Year Exception Authorization | |
| | | | | |
| Schedule & Classes | Evening & Final Exams | | | |
| | Course Catalog | Course Catalog Resources | | |
| | Schedule of Classes | Course Catalog Resources | | |
| Professional Development | Lock Up Classes | Course Catalog Resources | | |
| | EACADA | N/A | | |
| | NACADA | N/A | | |
| | | | | |
| | | | | |

General myPurdue Navigation and Portal Card Personalization

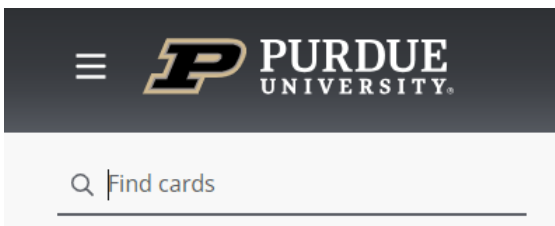
1. Upon your first log into the upgraded portal, there will be a number of cards defaulted on your Home page.
 - a. For Advising, the following cards should be defaulted (NOTE: There may be others but these are known at this time):
 - i. Advising: Student Record Tools
 - ii. Advising: Advisor Tools
 - iii. Advising: Help & Resources
 - iv. Course Catalog Resources
 - v. Graduation & Commencement Info
 - vi. Student of Concern Report
 - vii. To-Do List
 - viii. Web Links
 - b. Because the cards are only defaulted, the user can remove them from their Home page by clicking on the bookmark icon in the upper right corner of the card. This does not permanently delete the card, but simply removes it from the user's Home page. The card can still be found on the Discover page. Once you unbookmark the card, a message will appear in the upper right corner with an option to immediately undo the action to leave the card on your Home page.



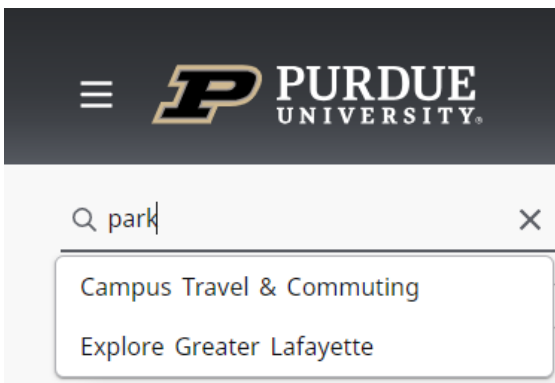
- c. Cards on a user's Home page can be moved around as the user sees fit. They can click and hold a card and then move it to a different location on the page.
 - i. NOTE: The only exception to this are any locked cards. Locked cards cannot be removed from a user's Home page until the action needed to release the lock are completed.
 1. Examples of locked cards for staff are:
 - a. Account Locked – this will appear if the user has expired Web Certifications like FERPA and GLBA.
 - b. Staff Account Reminder – this will appear to a staff member that may have an outstanding Bursar account with the university.
 2. Examples of locked cards for students are:
 - a. Student Account Reminder – this is for student's that have a past due balance.
 - b. Action Required – the student has a hold on their record.
2. To search for other cards, click on the 3 dash menu in the upper left corner of the page and click on Discover. You can also scroll to the bottom of the page and click on Discover More.



- a. On the Discover page, all available cards are seen in alphabetical order. Cards are restricted by security roles so the cards that a user sees are those that they have access to view. NOTE: While the card may be visible, if a user does not have the proper security to view a specific link within the card, they will get an error when they click on it. This is different than the former portal where we had the ability to restrict links to certain security roles. Since the upgraded portal security is at the card level we lost the ability to remove links within the card. As a result, we grouped some like items together knowing that some staff may not be able to access everything on that card. Presumably staff know what they use and have access to so this should not be an issue.
- b. To find something specific we have created a number of key search words. If you are looking for something in particular, you can type the key word in the Find cards field.

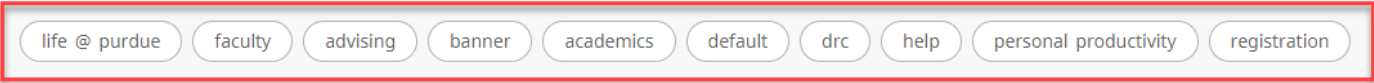


- c. The system will start to display cards that contain information about the search words being used.



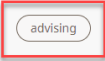
- d. The Discover page also has a number of tags that can be selected to view cards related to each tag. Simply click on a tag to see the available cards. To remove the tag filter, click on the tagged item a second time.

Q Find cards



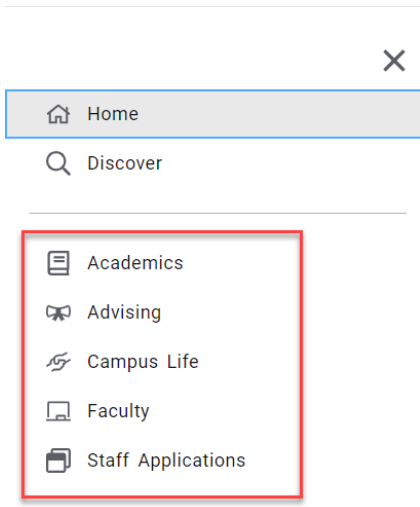
Q Find cards

SORT BY A-Z ▾

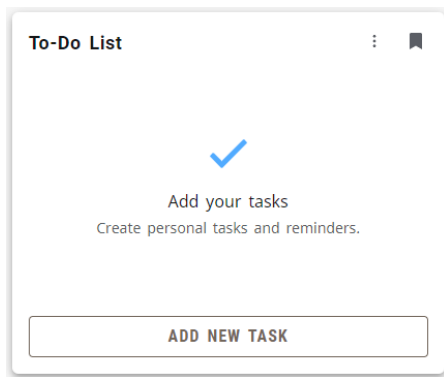


| | | | |
|--|--|--|---|
| Advising: Advisor Tools <ul style="list-style-type: none">Advisor CrossingBoilerConnectAdvisor Intake Forms SIF & Academic Notice SurveyStudent of Concern ReportingAcademic TranscriptmyPurdue Plan | Advising: Help & Resources <ul style="list-style-type: none">Advisor Apply to Graduate FAQCODO RequirementsCurricula Change Request DocsEduNav and myPurduePlan Issue LogmyPurdue Page ScreenshotsMy Personal Info | Advising: Student Record Tools <ul style="list-style-type: none">Advisor Student ProfileAdvisee Candidate ListingCandidate ClearanceCognos PortalCurricula Change RequestMax Credit Hour Override Form | Registrar Forms <ul style="list-style-type: none">Form 23 - Drop/Add FormForm 60 - Statement of IncompleteForm 65 - Extended Incomplete RequestForm 350 - Academic Record Change/Grade Cha...Form 390 - Directed Credit FormExcess Credit FormInclude/Exclude FormPurdue University 10 Year Exception Authorization |
|--|--|--|---|

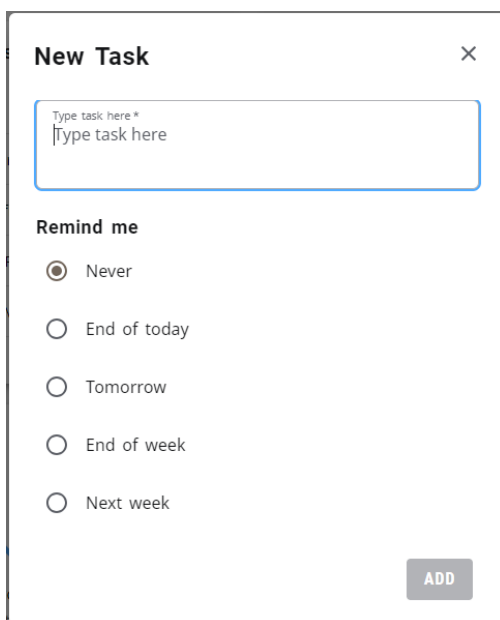
3. Also in the Main Menu (the 3 dashes in the upper left corner), there will be a number of category links as well that if selected will filter on the cards assigned to each category. NOTE: This list may be different at go live. Below is only a representation of the data in our test system.



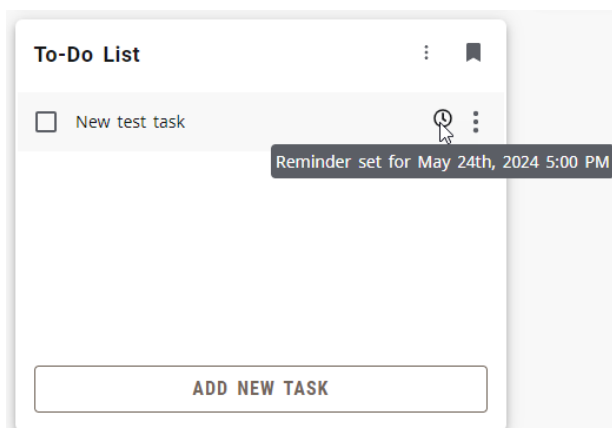
4. There are 2 cards that the user can use to personalize some information on their Home page.
- a. To-Do List – this card allows a user to enter personal action items.



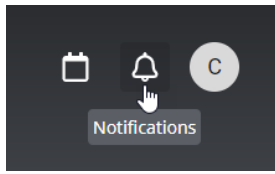
- i. Click on Add New Task. A new window appears where you can enter the details of the to-do item and set a reminder if desired. When the information is entered as desired, click on Add to put the task item in the card.



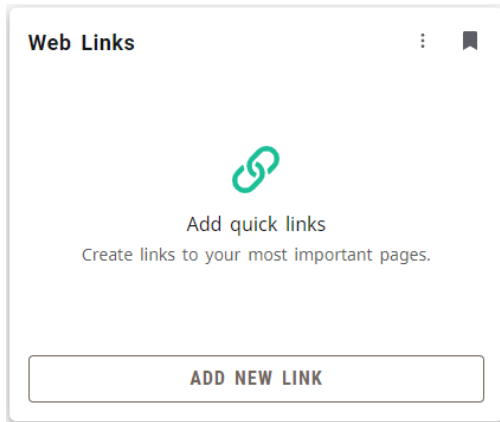
- ii. Below is what the task looks like after saving.



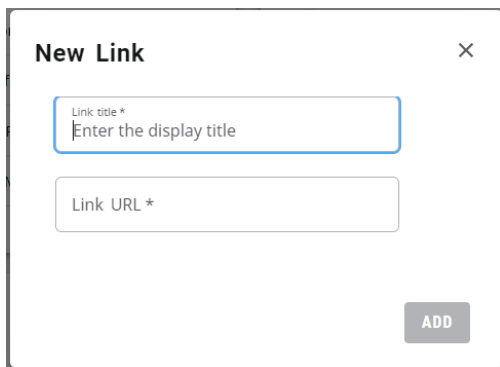
- iii. If a reminder is set I believe it will appear in the notifications section at the top of the Home page.



b. Web Links – this card allows users to add external web pages for easy access to desired content.



i. Click on Add New Link. A new window will appear where you can add a name of the web site and the official URL of the site and then click Add. NOTE: You will need to be sure to add https:// for each URL in order for it to be recognized.



ii. Below is what the web link looks like after saving.

