

How to Release and Set Advising Restrictions

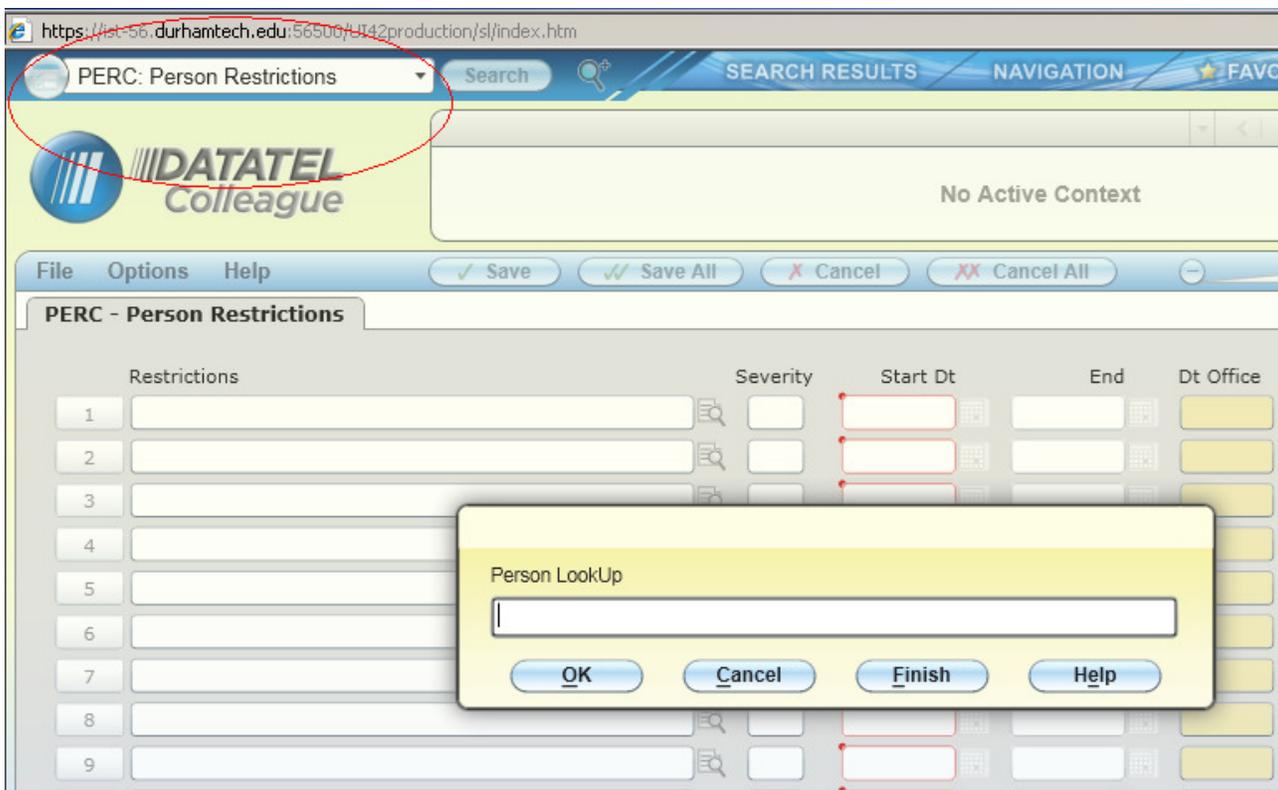
Advising restrictions are set by advisors so students can register for the upcoming semester using web registration (WebAdvisor). Advising restrictions are set through the Person Restrictions section of Colleague and the mnemonic is **PERC**.

Step One: Access PERC Screen

To access the restriction screen, type **PERC** In the forms box.

Step Two: Select Student Record (Person Look Up)

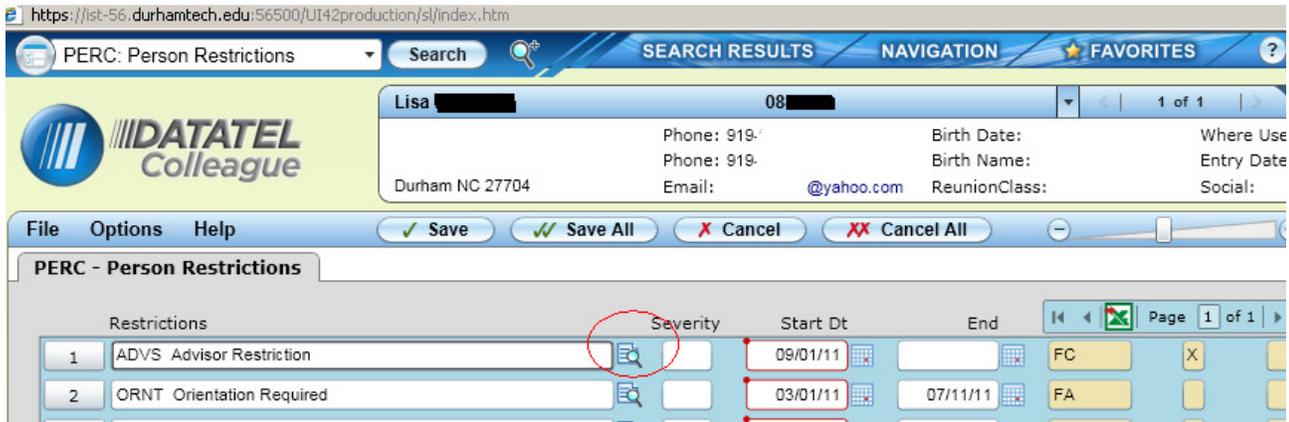
After you enter **PERC** in the Forms box and click Search (or use Enter key), you will arrive at the **Person Look Up** screen (if you did not previously select a student using Person). You can look up a student using their Durham Tech student ID number or by name.



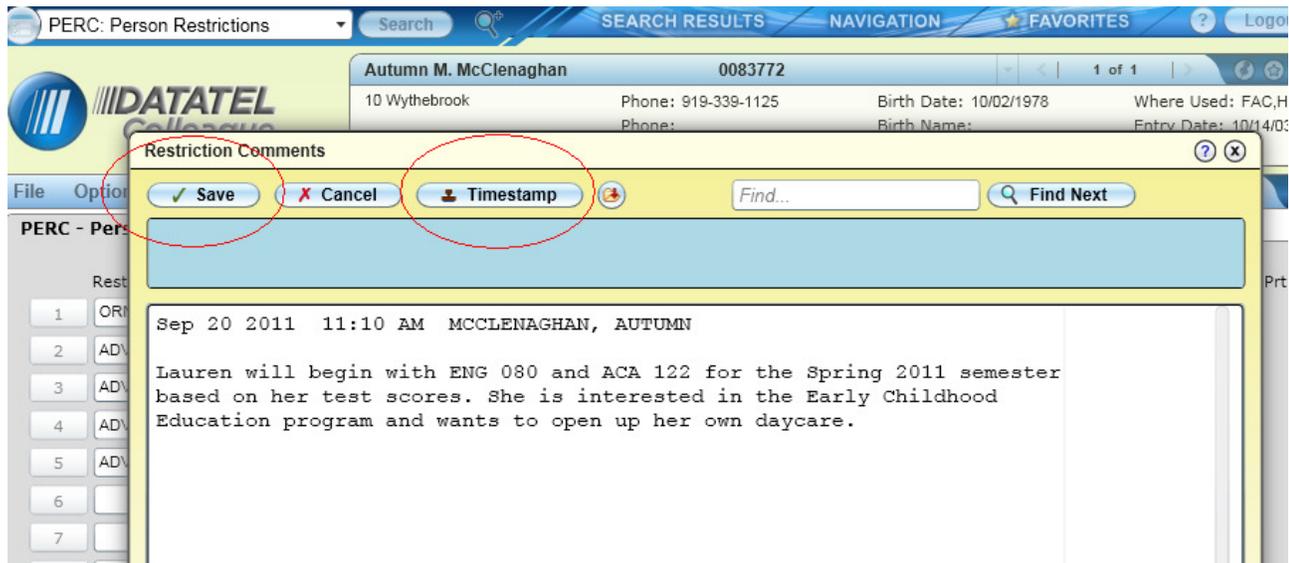
Step Three: Add Comments

After you have selected a student record, you will arrive at the **PERC** screen. The **PERC** screen will have an advising restriction (ADVS Advisor Restriction) and Start Dt (Start Date) populated for the student you have selected. Although other restrictions for the student may be listed, as an advisor you will only need to address the advising restriction.

Select the magnifying glass to the right of the restriction.



After you select the magnifying glass to the right of the ADVS Advisor restriction, you arrive at UTEC-Restriction Comments. Here you can note comments about your meeting with an advisee like courses you discussed, how the student met prerequisites, anything that would be helpful as you (or another advisor) meet with this student again in the future. Make sure that comments are appropriate for public record.



When you are finished writing comments, the comments will need to be saved and updated. Use the Timestamp button at the top of the page to insert your name, date, and time. Then select Save to save your comments.

At the PERC screen, place your cursor in the End Dt (End Date) box of the restriction. You will notice that there is an "X" in the Comm (Comments) column on PERC.

Restrictions	Severity	Start Dt	End	Dt Office	Comm
1 ADVS Advisor Restriction		06/01/11		FC	X
2 DNP-F Do Not Purge-Financial A		04/15/11	05/01/11	FA	
3 ADVS Advisor Restriction		02/01/11	04/06/11	FC	

Step Four: Set Advising Restriction End Date

After you are finished meeting with your advisee, you can set the End Date to allow the student registration access. The student will then be able to register using WebAdvisor at the designated registration time. The End Date needs to be backdated one day from the day you meet with your advisee. For example, if you meet with your advisee on 10/20/11, you will enter 10/19/11 in the End Date field.

After you enter in an End Date, place your cursor in the **next empty** restrictions box.

Restrictions	Severity	Start Dt	End	Dt Office	Comm
1 ADVS Advisor Restriction		06/01/11	10/19/11	FC	X
2 DNP-F Do Not Purge-Financial A		04/15/11	05/01/11	FA	
3 ADVS Advisor Restriction		02/01/11	04/06/11	FC	
4 ADVS Advisor Restriction		09/01/10	12/06/10	FC	
5 DNP-F Do Not Purge-Financial A		07/12/10	08/01/10	FA	
6 ADVS Advisor Restriction		06/01/10	06/21/10	FC	
7 ADVS Advisor Restriction		02/01/10	04/10/10	FC	
8					
9					

Step Five: Set New Advising Restriction and Start Date

While setting the End Date allows the student to register for the current semester, another advising restriction and Start Date needs to be set for the next semester you meet with your advisee.

With your cursor in the empty restrictions box, type **ADVS** then hit the enter key or tab key. This will populate the restrictions box with "**ADVS Advisor Restriction**". The Start Date automatically populates with today's date. You must set the Start Date according to the date breakdown listed below for the next semester that the student needs to meet with you. Please note that XX represents the last two digits of the year.

- 09/01/XX Start Date entered to meet prior to Spring semester (ex. 09/01/11)
- 02/01/XX Start Date entered to meet prior to Summer semester (ex. 02/01/11)
- 06/01/XX Start Date entered to meet prior to Fall semester (ex. 06/01/11)

For example, if you meet with a student in October 2011 and will require the student to meet with you next semester, the new Start Date will be 02/01/12. Or another example, if you meet with a student in October 2011 but will not require the student to meet with you for a year, the new Start Date will be 09/01/12.

PERC - Person Restrictions		Restrictions	Severity	Start Dt	End	Dt Office
1	ADVS Advisor Restriction			06/01/11	10/19/11	FC
2	DNP-F Do Not Purge-Financial A			04/15/11	05/01/11	FA
3	ADVS Advisor Restriction			02/01/11	04/06/11	FC
4	ADVS Advisor Restriction			09/01/10	12/06/10	FC
5	DNP-F Do Not Purge-Financial A			07/12/10	08/01/10	FA
6	ADVS Advisor Restriction			06/01/10	06/21/10	FC
7	ADVS Advisor Restriction			02/01/10	04/10/10	FC
8	ADVS Advisor Restriction			02/01/12		FC
9						

Some students may have additional restrictions on their record such as library fines, business office holds, or “Do not purge”, but the only restriction advisors should have access to set is ADVS Advisor Restriction. If other restrictions are listed, just place your cursor in the next empty restrictions box to enter the ADVS Advisor Restriction.

After the End Date for the first advisor restriction and the next ADVS restriction and Start Date have all been entered, the student’s record will need to be saved and updated. To save the changes made in the student record click the **SAVE ALL** button. After you click the **SAVE ALL** icon, you will return to the main menu.

