

Workday Student Advisor Quick Reference Guide

This quick reference guide will cover the tasks in the Academic Advising Application (APP). This app is a dashboard for the most common Advisor/Advisee information.

Open the Academic Advising App by selecting it from the list of YOUR TOP APPS on your Workday home page. The Academic Advising App displays the following common tasks:

EDIT AN ACADEMIC PLAN

- Click on EDIT ACADEMIC PLAN
- Enter the name of the student and click ok.
- Choose the Academic Period you want to update.
- You can drag academic requirements from the list on the left, into the academic plan.

OR

- You can click on the plus sign icon (+) to add new academic requirements or courses that may not be listed on the left of the screen.
- Click on the blue OK button to save.

STUDENT COHORTS

- Find Student Cohorts.
- View Support Network for Student.

CLASS ROSTERS

- View Course Section Roster.

MY ADVISING and MY ADVISEES

- These reports will provide a list of all students assigned to you for academic advising.

INITIATE CLASS SUBSTITUTION, WAIVER OR OVERRIDE

If you know the name of the Academic Requirement:

- Click on INTIATE SUBSTITUTION, WAIVER OR OVERRIDE.
- Enter the student name.
- Choose the Academic Requirement that needs to be changed.
- Choose the Override Type.
- Click OK.
- Enter any required notes or comments.
- Click SUBMIT. The override request has been routed for approval.

If you do not know the name of the Academic Requirement:

- Type in the name of the student in the search bar at the top of the Workday home page.
- Choose the correct student name, under the heading STUDENT.
***NOTE** – students may have WORKER records if they have been a student employee. Be sure to choose the student name under the STUDENT heading.

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- Click on the ACADEMICS section in the blue area on the left of the screen, then choose ACADEMIC PROGRESS.
- Hover over the academic requirement and click on the small button with three dots, choose Academic Requirement then Create Override.
- Choose the Override Type, click OK.
- Enter any required notes or comments
- Click SUBMIT. The override request has been routed for approval.

HOW TO REMOVE ADVISING HOLDS (applies to Undergraduate Students only)

- Type in the name of the student in the search bar at the top of the Workday home page.
- Choose the correct student name, under the heading STUDENT.
*NOTE – students may have WORKER records if they have been a student employee. Be sure to choose the student name under the STUDENT heading.
- Once the student record is open, click on the ACTION ITEMS & HOLDS section in the blue area on the left of the screen.
- Choose the ACADEMIC PLAN NEEDS REVIEW hold on the student record.
- Hover over the magnifying glass icon and then click on the small button with three dots.
- In the screen that pops up, choose HOLDS under the ACTIONS header on the left of the pop-up screen.
- Click on REMOVE HOLD.
- Scroll down on the next screen and click on the CONFIRM box.
- Enter any comments you may want in the COMMENTS box.
- Click on the orange SUBMIT button to complete removing the Academic Plan Needs Review hold.

***NOTE**-students may have other holds on their record preventing their class registration such as a financial hold. These also will need to be resolved as appropriate prior to a student being able to register for classes.