

## Success Team Assignment Guide

The purpose of this guide is to provide instructions for using the Success Team Assignment tool in Ellucian Workflow. This tool allows administrators to update the members of student success teams directly in Banner. *Note:* You need to collect and modify your student list before using the tool. It's advised to group them by the type of change you're intending to make.

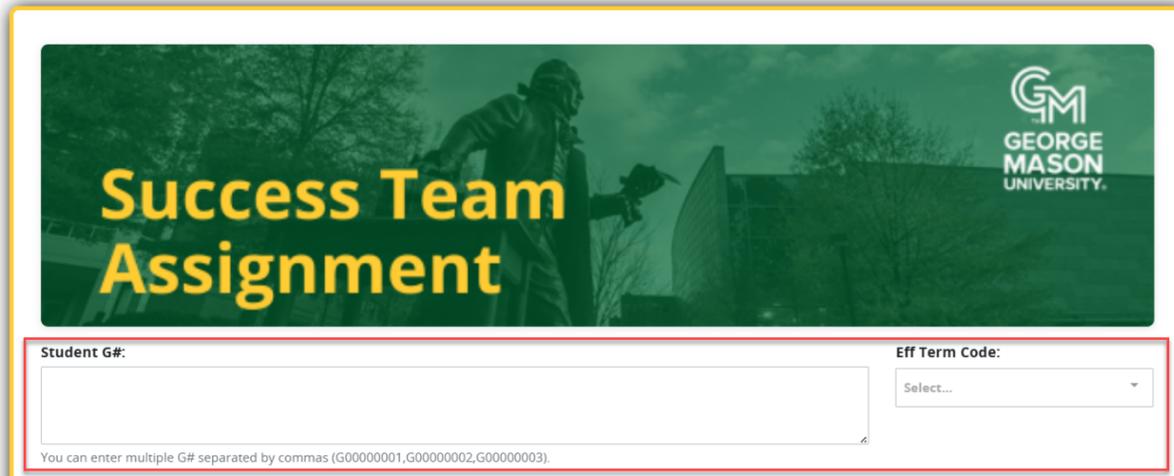
### 1. Sign in with your Mason credentials

Any administrator can access this form. It is linked in the Controlled Forms section of the OUR Forms page, and the link can be distributed internally to any administrator.

### 2. Enter the student G#s and Eff Term Code.

G#s can be typed individually or copy/pasted from a spreadsheet or plain text document. The entries will be automatically formatted to be separated by a comma and remove duplicates. The limit in the Student G# field is 2000.

Effective Term Code is the term in which the change will be inserted in Banner. You can make changes to a current or future term.



The screenshot shows the top portion of the Success Team Assignment form. It features a green header banner with the text "Success Team Assignment" in yellow and the George Mason University logo. Below the banner are two input fields: "Student G#" and "Eff Term Code". The "Student G#" field is empty, and the "Eff Term Code" field is a dropdown menu with "Select..." as the current selection. A small note below the "Student G#" field reads: "You can enter multiple G# separated by commas (G00000001,G00000002,G00000003)." The entire form area is enclosed in a red border.

### 3. When you have entered the G#s and Eff Term Code, click LOOKUP STUDENT(S).



This screenshot shows the same form as above, but with example data entered. The "Student G#" field contains "G00074006" and the "Eff Term Code" dropdown is set to "Fall 2025". The same note about multiple G#s is present. Below the form, a yellow button labeled "LOOKUP STUDENT(S)" is highlighted with a red arrow pointing to it from the right.

LOOKUP  
STUDENT(S)

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If you enter more than 20 student G#s, the button will change to **BULK SUBMIT**.

This will require more time to pull students' information from Banner. You will see a confirmation screen and a subsequent email with link will prompt you to continue with the process once all their information has loaded.

#### 4. Review the list of students populated below, and select the ones you want to adjust, then click NEXT.

The students' G#, name, latest term record (as of selected effective term or prior) and a list of their success team users will display.

Take note that some students may have a future term record. Consider changing your **Eff Term Code** to match or be later than their current record, otherwise, the latest record will supersede any changes you make in the prior term.

Best practice: Students should always have a Primary Advisor. The Primary advisor can only be **MAJR** or **GRAD** type and will be listed as such in the Success Team column of the search results:

Students				
Student G#	Student Name	Term Eff	Success Team	
<input checked="" type="checkbox"/>	G00074006	Vrr, Testi	Spring 2025	MAJR: ayadav; MAJR: jsims8; OTHR: vsarro; SUCO: cmattos; OTHR: Imillera; ATHL: Imillera; MAJR (Primary): Iscott; ATHL: tbutle; MINR: bselinsk

#### 5. After you click NEXT, you will be prompted to enter the details of your request.

- Click **ADD / EDIT** to update or change the list of selected students

Type of Action:  Assignment Type:  Effective Term:

- Assignment Type – select from the list of all available advisor types

ADVA	ADVANCE Success Coach	MAJR	Major Advisor
ATHL	Athletic Advisor	MINR	Minor Advisor
BAM	BAM Graduate Advisor	OTHR	Other Advisor
GRAD	Graduate Advisor	SUCO	Success Coach
HNRS	Honors Advisor	UNIV	University Advisor

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- Effective Term – was selected in the previous page. If you need to change the Effective Term value, click the **ADD / EDIT** button.

- TYPE OF ACTION – select from Add, Replace, or Delete.

- **Add**

- Add a new user of any Type
- Add or Replace students' Primary Major Advisor (Primary is checked)

**NEW ASSIGNMENT**

<input type="checkbox"/> Primary	GNum:	First Name:	MName:	Last Name:	NetId:
					<b>ADD USER</b>

- **Replace**

- Will only replace the user you indicate in the OLD USER section
- User must match the selected Assignment Type
  - E.g. If lyi3 is a Primary Major Advisor for some students and a non-Primary Major Advisor on others, the WF will replace every place lyi3 is found as Major Advisor

Enter either netID or G# for the old user and click

**LOOKUP USER**

**OLD USER**

Only one of either Netid or mCode should be used for lookup. If both are entered, perform the lookup based on NetId.

<input type="text" value="Netid"/>	<input type="text" value="G00000000"/>	<b>LOOKUP USER</b>		
Netid	GNum	LName	FName	Type
<input type="text"/>	<input type="text" value=""/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select..."/>

Enter the New User you intend to replace the old user with by clicking **ADD USER**, searching and selecting the new user. Only users who are eligible to be an Advisor in Banner can be selected.

**NEW ASSIGNMENT**

GNum:	First Name:	MName:	Last Name:	NetId:	
					<b>ADD USER</b>

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- **Delete**

- Will remove the Old User wherever listed with the matching Type

**OLD USER**

Only one of either Netid or mCode should be used for lookup. If both are entered, perform the lookup based on Netid.

<input type="text" value="Netid"/>	<input style="color: red; font-size: small; text-align: center;" type="text" value="G00000000"/> ⓘ	<input type="button" value="LOOKUP USER"/>		
Netid	GNum	LName	FName	Type
<input type="text"/>	<input style="color: red; font-size: small; text-align: center;" type="text"/> ⓘ	<input type="text"/>	<input type="text"/>	<input type="text" value="Select..."/>

6. **Once your request is completely filled out, click on**

- The form will load the information and display the change you have requested. Double check that the changes are as intended.
- Students may be split up into 2 different lists, when applicable.
  - The effected students will be listed under **STUDENT LIST (meets the criteria)**.
  - If students aren't affected by the change, they will be separately listed under **STUDENT LIST (unable to process)**.

7. After reviewing and confirming the intended changes, click  at the bottom of the page.

8. A confirmation screen will appear. You will receive an email once the request has been processed in Banner.

9. To review past requests, College/School Academic Affairs Offices have access to the Success Team Assignment report in [Ellucian Workflow](#). Please contact [regwf@gmu.edu](mailto:regwf@gmu.edu) if you need guidance with navigating the platform.