

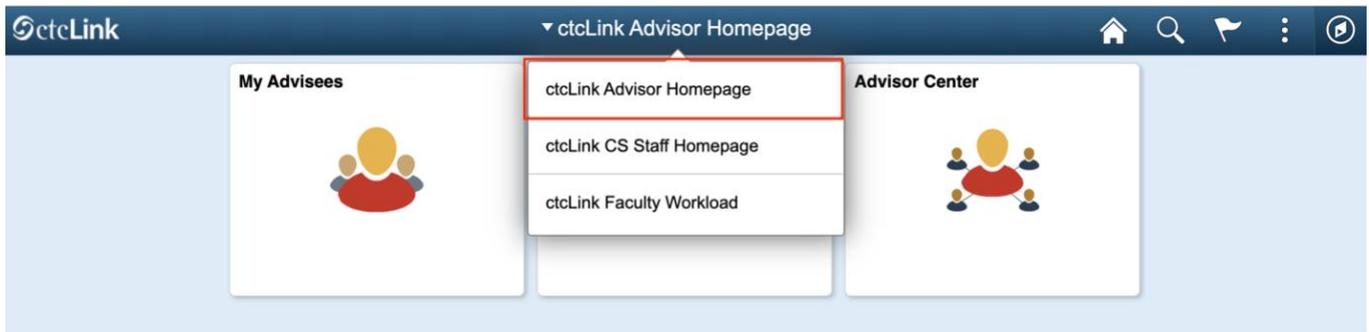


How to Create an Advising Note Through My Advisees

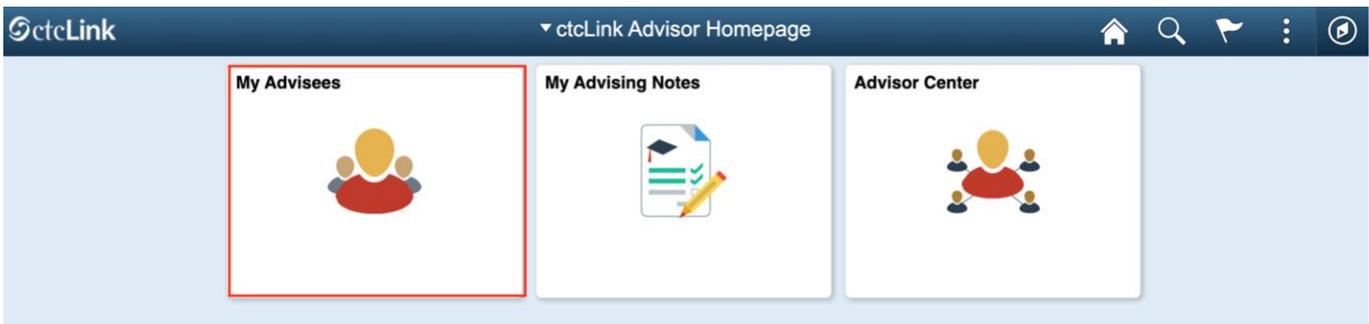
This guide will show you how the new advising tool — and notes process — works. Using My Advisees, you will be able to create an advising note for a student.

Directions

1. If you are not already on the **Advisor Homepage**, use the drop-down menu to navigate there.



2. Click the **My Advisees** tile.

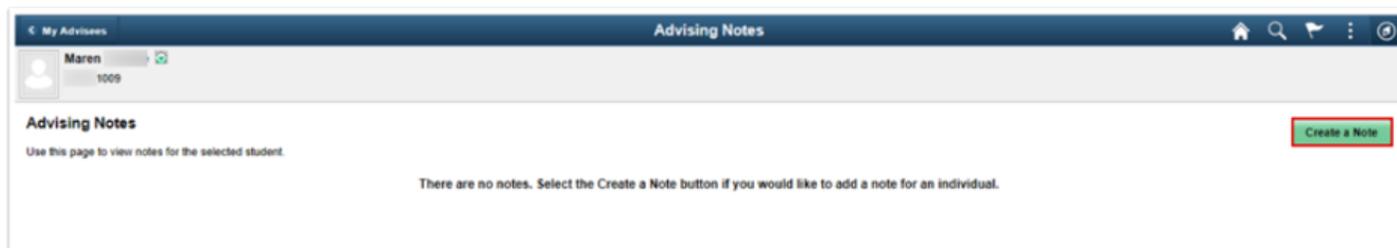


3. The **My Advisees** page will display.
4. Click the **Advising Notes** icon for one of the assigned advisees.

Notify	Name / ID	Committee	Email	Advising Notes
<input type="checkbox"/>	Maren 1009		@test.com	
<input type="checkbox"/>	Jayda 1106		@test.com	
<input type="checkbox"/>	Hawa 2333		@test.com	
<input type="checkbox"/>	Rebecca 2714		@test.com	
<input type="checkbox"/>	David		@test.com	

Part 1: Create a Note

5. The **Advising Notes** page displays.
6. Click the **Create a Note** button.



7. Another **Advising Notes** page displays.

Note: In the **Create Advising Note** subsection, there are several actions that need to be completed prior to submitting the advising notes.

8. Select or confirm the **Institution**.
9. Select a **Category**.
10. Select a **Subcategory**.
11. Add any text to the **Subject** field.
12. Confirm the note **Status** is **Open**.
13. Select an **Advisee Access** value of **Yes** to enable student view.
14. The **Assigned To** value is defaulted to your user ID (as advisor). If applicable, enter another ID to assign this note to another staff member.
15. Select a **Contact Type** if desired.
16. At this point, you are now able to click the **Add Note Item** button.

Part 2: Add a New Note Item

17. The **Add a New Note Item** pagelet will display.
18. Enter a message in the field provided.
19. Click the **Apply** button.

Cancel **Add a New Note Item** Apply

Normal - Font - Size - **B** *I* U ~~S~~ [List Icons] [Align Icons] [TextColor] [BGColor]

Let's schedule an appointment to review your schedule for next term to make sure we are optimizing your goals for career planning.

20. You will be returned to the **Advising Notes** page.
21. The **Note Items** subsection will now show the new note you created during the **Add a New Note Item** process.
22. The **Note Item** will indicate the note number, in this example 1 (one).
23. The **Entered By** field will be populated with your username.
24. The **Entered On** date will be populated with the current system date.
25. The **Comment** field will display the message you added during the **Add a New Note Item** process.
26. Click the **Add Action Item** button.

Note Item	Entered By	Entered On	Comment
1	Laura	06/26/2019	Let's schedule an appointment to review your schedule for next term to make sure we are optimizing your goals for career planning.

▼ **Action Items**

No data exists.

Add Action Item

▼ **Attachments**

No data exists.

Add Attachment

Part 3: Add Action Item

27. The **Add Action Item** pagelet will display.
28. Input a description in the **Description** field.
29. Select an **Action Item Status** of **Incomplete**.
30. Click the calendar icon in the **Due Date** field.
31. Set the **Due Date**.
32. Click the **Apply** button.

The screenshot shows a form titled "Add Action Item" with a "Cancel" button on the left and an "Apply" button on the right. The form contains the following fields:

- Action Item 1
- Entered On: 06/26/2019
- Description: follow up with calendar
- Action Item Status: Incomplete (dropdown menu)
- Due Date: 07/08/2019 (with a calendar icon)

33. You will be returned to the **Advising Notes** page.
34. The **Action Items** subsection will now show the new action item you created during the **Add Action Item** process.
35. The **Action Item** will indicate the action number, in this example 1 (one).
36. The **Entered On** date will be populated with the current system date
37. The **Description** field will display the description you entered during the **Add Action Item** process.
38. The **Status** will display as **Incomplete**.
39. The **Due Date** will display.
40. Click the **Add Attachment** button if you want to add an attachment.

The screenshot shows a table with the following data:

Note Item	Entered By	Entered On	Comment
1	Laura	06/26/2019	Let's schedule an appointment to review your schedule for next term to make sure we are optimizing your goals for career planning.

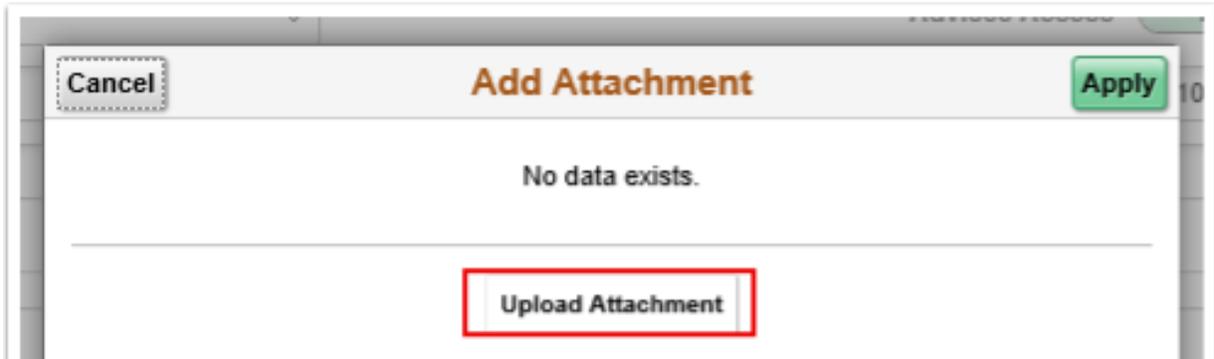
Action Item	Entered On	Description	Status	Due Date
1	06/26/2019	follow up with calendar invite.	Incomplete	07/08/2019

Below the table is an "Attachments" section with the text "No data exists." and an "Add Attachment" button.

Part 4: Add Attachment (if needed)

41. The **Add Attachment** pagelet will display.

42. Click the **Upload Attachment** button.



43. The **File Attachment** pagelet will display.

44. Click the **My Device** button to view files on your device.



45. The file selection screen on your device will display.

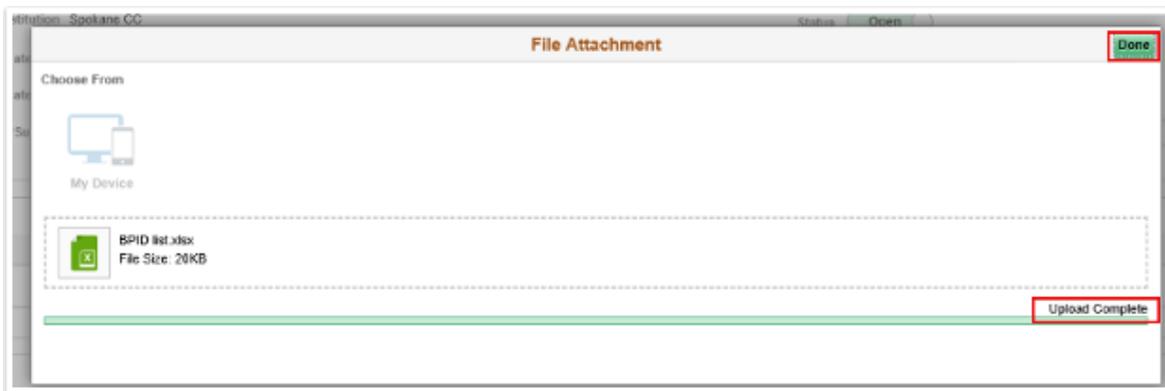
46. Select a file and click **Open**.

47. Click the **Upload** button.



48. The **Upload Complete** status will display.

49. Click the **Done** button.



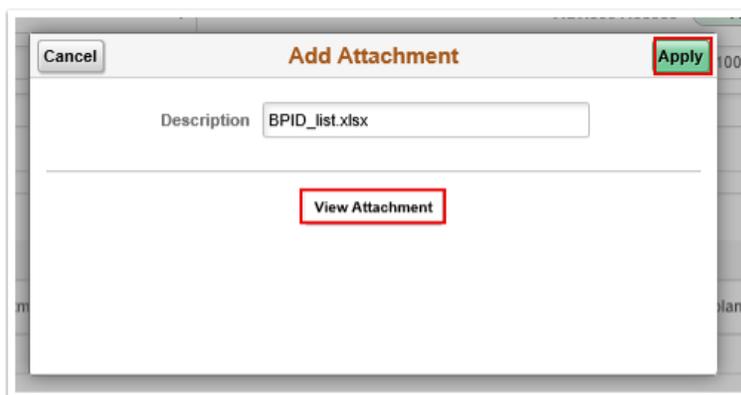
50. The **Add Attachment** pagelet will display.

51. Click the **View Attachment** button.

52. A new browser window will display the attachment or provides additional instructions/options to open or save.

53. Close the new browser tab the attachment was opened in.

54. Click the **Apply** button.

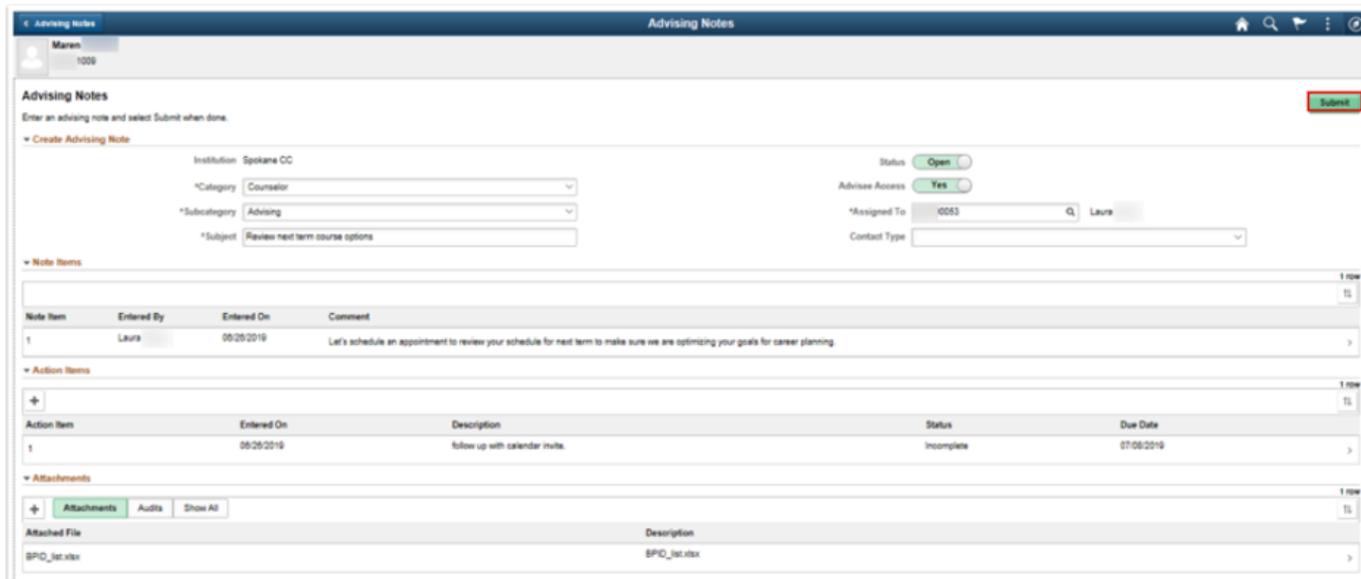


Part 5: Submit Advising Notes

55. You will be returned to the **Advising Notes** page.

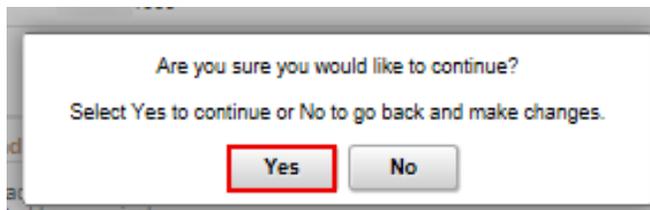
56. The **Attachments** subsection will now show the new file you attached during the **Add Attachment** process.

57. Click the **Submit** button at the top right of the page.

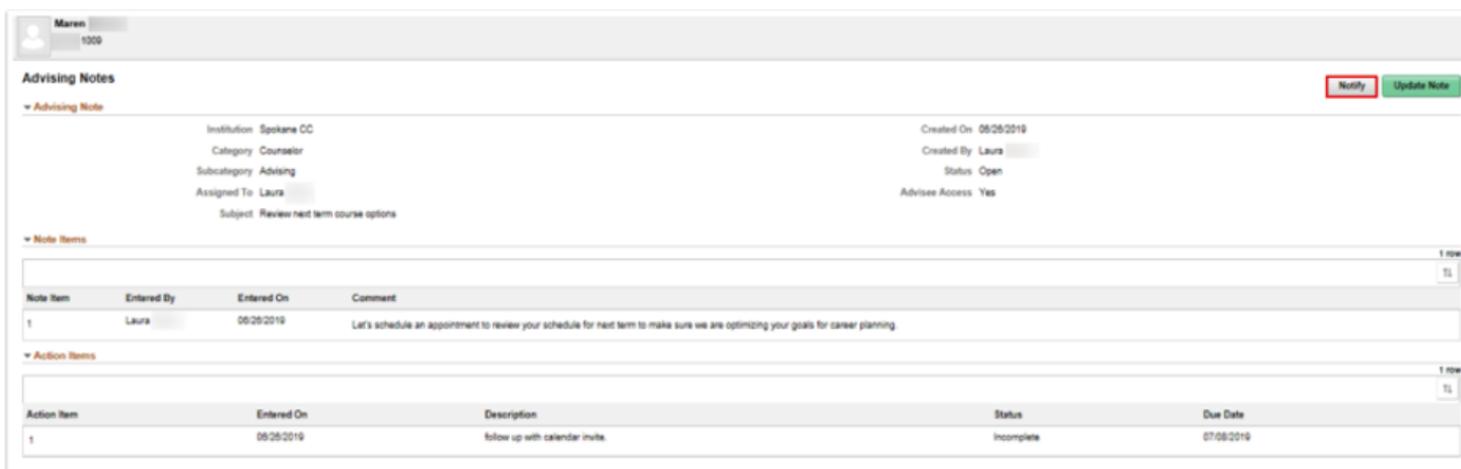


58. A message pagelet will display asking if you are sure you want to continue.

59. Click the **Yes** button.



60. Click the **Notify** button at the top right of the page.

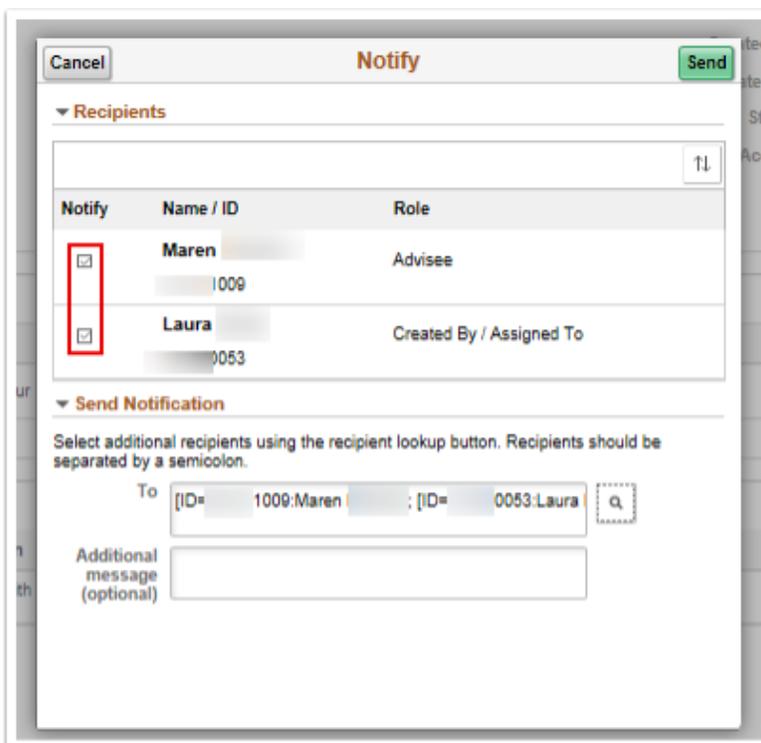


Part 6: Notify

61. The **Notify** pagelet will display.

62. In the **Recipients** section, click the **Notify** checkbox for the recipients displayed.

63. In the **Send Notification** section, click the **Lookup** icon (magnifying glass) to find and select an additional recipient to send the notification to, if needed.



64. The **Additional Recipients Lookup** pagelet will display.

65. Complete any of the following fields:

- **First Name**
- **Last Name**
- **Empl ID**

66. Click the **Search** button.

67. Click the checkbox for the recipient identified in the **Search Results**.

68. Click the **Continue** button.

Additional Recipients Lookup

Cancel Continue

First Name

Last Name

Empl ID

Search

69. The **Notify** pagelet will display.

70. Add a comment in the **Additional message** field (optional).

71. Click the **Send** button.

Notify

Cancel Send

▼ Recipients

Notify	Name / ID	Role
<input checked="" type="checkbox"/>	Maren 1009	Advisee
<input checked="" type="checkbox"/>	Laura 0053	Created By / Assigned To

▼ Send Notification

Select additional recipients using the recipient lookup button. Recipients should be separated by a semicolon.

To

Additional message (optional)

72. A confirmation message will display.

73. Click the **Yes** button.

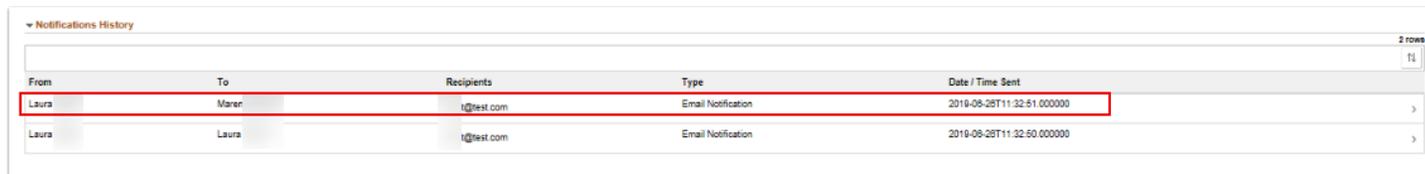
Are you sure you would like to continue?

Select Yes to continue or No to go back and make changes.

Yes

74. The **Notifications History** section of the page will display (scroll to bottom of page).

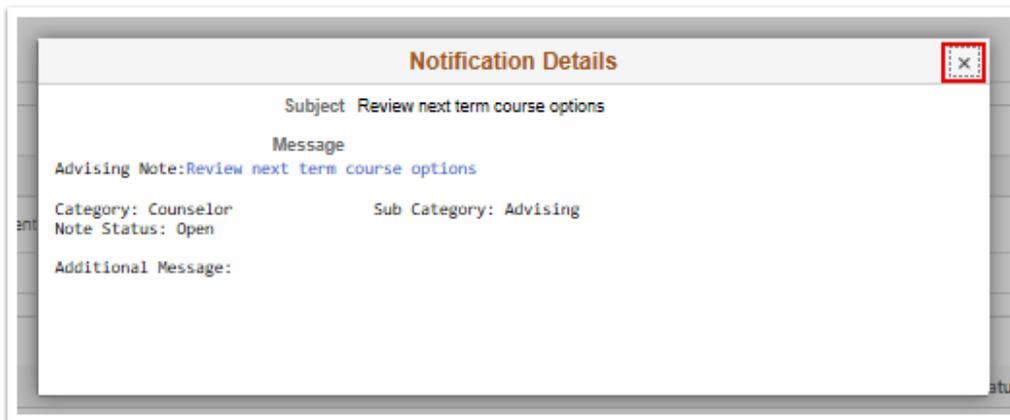
75. Click one of the results from the bottom of the page.



From	To	Recipients	Type	Date / Time Sent
Laura	Maren	l@test.com	Email Notification	2010-08-26T11:32:51.000000
Laura	Laura	l@test.com	Email Notification	2010-08-26T11:32:50.000000

76. The **Notification Details** page will display.

77. Click the [X] at the top right to close.



Notification Details

Subject: Review next term course options

Message

Advising Note: Review next term course options

Category: Counselor Sub Category: Advising

Note Status: Open

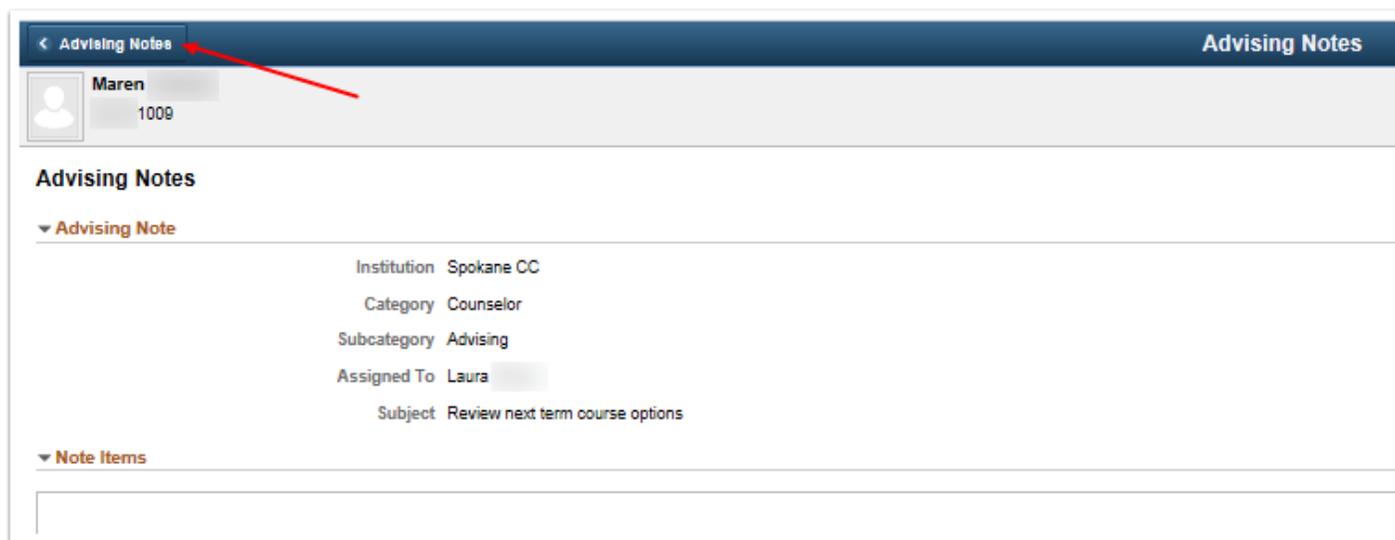
Additional Message:

Part 7: Validation

78. The **Advising Notes** page will display.

79. Click the **Advising Notes** button at the top left of the page.

80. Validate the new advising note is displayed in **Advising Notes** section.



Advising Notes

Maren 1009

Advising Notes

▼ **Advising Note**

Institution: Spokane CC
Category: Counselor
Subcategory: Advising
Assigned To: Laura
Subject: Review next term course options

▼ **Note Items**



My Advises Advising Notes

Maren 1009

Advising Notes Create a Note

Use this page to view notes for the selected student.

View Note	Subject	Category / Subcategory	Created By / Assigned To	Institution	Status / Action Item	Created On / Last Updated	Update Note
	Review next term course options	Counselor Advising	Laura Laura	Spokane CC	Open Pending	08/26/2019 08/26/2019	