

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.

©ctcLink		▼ ctcLink Advisor Homepage		Â	Q	~	:	۲
	My Advisees	ctcLink Advisor Homepage	Advisor Center					
		ctcLink CS Staff Homepage	4.4					
	```	ctcLink Faculty Workload						

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.

C Advisor Homep	age	My Advisees			ŵ	Q,	۲	: (۲
My Advisees								18 rows	Î
	0							11	
Notify	Name / ID	Committee	Email	Advising Notes					
	Maren 1009		@lest.com	10					l
	Jayda 1106		@test.com	я					l
	Hawa 2333		@test.com	18					l
	Rebecca 2714		@lest.com						ł
	David		Obul con						

Part 1: Create a Note

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

K My Advisees	Advising Notes	ŵ	Q	۲	:	0
Maren) 🖸 1009						
Advising Notes				Crea	ite a N	ote
Use this page to view notes for the selected student.						
	There are no notes. Select the Create a Note button if you would like to add a note for an individual.					

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.

Advising Notes		Advising Notes		ŵ	Q	۲	: 0
Maren 1009							
Advising Notes							Submit
Enter an advising note and select Submit who	en done.						
 Create Advising Note 							
Institution	Spokane CC	Status	Open ()				
"Category	Counselor \sim	Advisee Access	Yes				
*Subcategory	Advising \sim	*Assigned To)053 Q Laura				
*Subject	Review next term course options	Contact Type			~		
- Note Items							
No data exists. Note item is required.							
Add Note Item							
- Action Items							
No data exists.							
Add Action Item							
 Attachments 							
No data exists.							
Add Attachment							
No dala exists. Add Action Item Attachments No dala exists. Add Attachment							

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.

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shadula an appointment to review very schedule for paul term to make sure up are estimizing very peak for	your schedule for next term to make sure we are optimizing your goals for								~
planning.									1
			ppointment to review you	ur schedule for next	term to make su	re we are op	timizing you	ir goals for	~
		et's schedule an a areer planning.	ppointment to review you	ur schedule for next	term to make su	re we are op	timizing you	ir goals for	~
		Let's schedule an a career planning.	ppointment to review you	ur schedule for next	term to make su	re we are op	timizing you	r goals for	~
		Let's schedule an a career planning.	ppointment to review you	ur schedule for next	term to make su	re we are op	timizing you	r goals for	~
		Let's sohedule an a career planning.	ppointment to review yo	ur schedule for next	term to make su	re we are op	timizing you	r goals for	v
		Let's schedule an a career planning.	ppointment to review you	ur schedule for next	term to make su	re we are op	timizing you	r goals for	×
		Let's sohedule an a career planning.	ppointment to review yo	ur schedule for next	term to make su	re we are op	timizing you	r goals for	×

- **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 Items			
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 Iten	ıs		
No data exists.			
Add Action	Item		
 Attachmen 	ts		
No data exists.	ment		

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.

Cancel		Add Action Item Apply
	Action Item	1
	Entered On	06/26/2019
	Description	follow up with calendar
	Action Item Status	Incomplete \vee
	Due Date	07/08/2019
8		

- **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.

• Note Items						
						1 row
						11
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 of	plimizing your goals for career planning.		>
 Action Item 	5					1 mm
+						11
Action Item		Entered On	Description	Status	Due Date	
1		06/26/2019	follow up with calendar invite.	Incomplete	07/08/2019	>
 Attachment 	5					
No data exists.						
Add Attachm	sent					

Part 4: Add Attachment (if needed)

- **41.** The **Add Attachment** pagelet will display.
- **42.** Click the **Upload Attachment** button.

Cancel	Add Attachment	Apply 10
	No data exists.	
	Upload Attachment	

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

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

stitut	ion Spokane CC	
		File Attachment
Cate		
	Choose From	
cate		
*Su		
	My Device	

- **45.** The file selection screen on your device will display.
- **46.** Select a file and click **Open**.
- **47.** Click the **Upload** button.

FLITT	mon Spokane CC	
ate		File Attachment
ate	Choose From	
Su		
	My Device	
l	Upload Clear	
	BPID list.xlsx File Size: 20KB	

48. The Upload Complete status will display.

49. Click the **Done** button.

stitu	ation Spokane CC Status (Open ()	
ate	File Attachment	опе
ate	Choose From	- 1
Su		
	My Device	- 1
	BPID list xisx File Size: 20KB	
	Upload Comp	ilete
		-1

- 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.

	Add Attachment	Apply	000
Description	BPID_list.xlsx		
	View Attachment		
			anı
	Description	Add Attachment Description BPID_list.xlsx View Attachment	Add Attachment Apply Description BPID_list.xlsx View Attachment

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.

4 Advising Notes			Advising Notes			A 9 7 1	۲
Maren							
Advising Notes						Subry	
Enter an advising note and select Submit when done.							
Create Advising Note	- Sections CC		n. (
an service of	n opokane co		Batus (Open			
*Categor	y Counselor	v	Advisee Access	Tes			
*Subcategor	y Advising	v	*Assigned To	0053	Q, Laura		
*Subje	Review next term course options		Contact Type			\sim	
- Note Items							
							1
Note New Entered Dy Edu	dered On Comment						
Laura 00	126/2019	and in an income a schedule for and how to an	da e un un par estado de un a contr for comos descion				
		and to reven you screece to rest arm to re-	are the residenced from State on caree bearing.				1
* Action Items							-
+							6
Action Item	Entered On	Description		Status	Due Date		
1	06/26/2019	follow up with calendar invite.		Incomplete	07/08/2019		5
* Attachments							
							-
+ Attachments Audits Show All							<u>n</u>
Attached File			Description				
BPIO_list.xlsx			BPID_list.xisx				>

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.

S Maren 1000								
Advising Note	es							Notify Update Note
• Advising Note								
		Institution Spokane CC			Created On	05/25/2019		
		Category Counselor			Created By	Laura		
		Subcategory Advising			Status	Open		
		Assigned To Laura			Advisee Access	Yes		
		Subject: Review next term	course options					
· Note items								1.00
								1
Note item	Entered By	Entered On	Comment					
1	Laura	06/25/2019	Let's schedule an appointme	nt to review your schedule for next term to make sure we an	e optimizing your goals for career planning.			
* Action Items								
								1.00
								π.
Action Item		Entered On		Description		Datus	Due Date	
1		08/25/2019		follow up with calendar invite.		Incomplete	07/08/2019	

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.

Cancel	Notify Send
 Recipie 	ents
	τL
Notify	Name / ID Role
	Maren Advisee
	Laura Created By / Assigned To
- Send N	lotification
Select addi separated t	itional recipients using the recipient lookup button. Recipients should be by a semicolon.
	To [ID= 1009:Maren ; [ID= 0053:Laura]
Addition messa (option	nal age hal)

- 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.

Cancel	Additio	nal Recipients Lookup	Continue
	First Name		
	Last Name		
	Empl ID		
	S	earch	

- **69.** The **Notify** pagelet will display.
- 70. Add a comment in the Additional message field (optional).
- **71.** Click the **Send** button.

1	Cancel			Send			
	 Recipie 	r Recipients					
							↑↓ A
	Notify	Name / ID		Role			
		Maren		Advisee			- 18
		100	9				
		Laura		Created B	y / Assigned To		- 1
		005	3				
	 Send N 	otification					- 1
	Select addi separated t	tional recipien by a semicolo	ts using the recip n.	pient lookup bu	tton. Recipients	should be	- 1
1		To [ID=	1009:Maren); [ID=	0053:Laura	Q	- 1
n	Addition messa (option	nal ge al)				lanand	

- **72.** A confirmation message will display.
- 73. Click the Yes button.

Γ	Are you sure you would like to continue? Select Yes to continue or No to go back and make changes							
nd t ac ated by	Yes No a semicolon.	be						

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.

 Notifications History 					
					2 rows
					11
From	То	Recipients	Туре	Date / Time Sent	
Laura	Maren	t@test.com	Email Notification	2019-08-28T11:32:51.000000	>
Laura	Laura	t@test.com	Email Notification	2019-08-28T11:32-50.000000	>

76. The Notification Details page will display.

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

I	Notification Details	×
	Subject Review next term course options	
	Message	
	Advising Note:Review next term course options	
ant	Category: Counselor Sub Category: Advising Note Status: Open	
	Additional Message:	
ł		- 1
		- 1
		atu

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	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 Advisees			Advising Notes				â	Q, 1	~	: 0
Maren 1009										
Advising Note	S								Create	a Note
Use this page to view notes for the selected student.										1 row
										Ť\$
View Note	Subject	Category / Subcategory	Created By / Assigned To	Institution	Status / Action Item	Created On / Last Updated	Uj	odate N	ote	
	Review part term course ontions	Counselor	Laura	Spokane CC	Open	06/26/2019				
	Review next terri course options	Advising	Laura	opokalie oo	Pending	06/26/2019				