
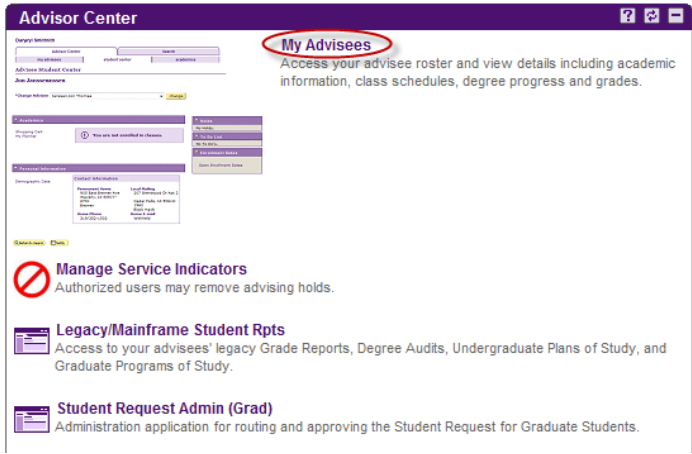
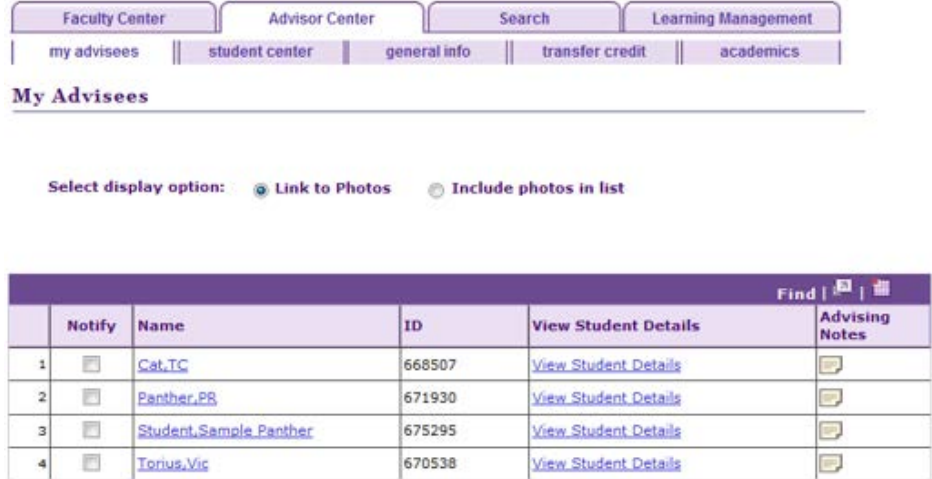




Creating Advising Notes using Advisor Center

Purpose: Users with appropriate security may create advisor notes via Advisor Center. The following instructions describe how to create advising notes.

Step	Action
1.	<p>Access and log into My UNiverse. Locate the Advisor Center pagelet on the Resources tab. You may have to scroll down.</p> <p><i>Note:</i> Advisor Center can also be added to the My Page tab using Personalize Content.</p> 
2.	<p>Use the My Advisees link in the Advisor Center pagelet.</p>  <p>Result: Advisor Center opens with the My Advisees tab displayed.</p> 


3. Use the **Advising Notes** icon for the appropriate student.

	Notify	Name	ID	View Student Details	Advising Notes
1	<input type="checkbox"/>	Cat,TC	668507	View Student Details	
2	<input type="checkbox"/>	Panther,PR	671930	View Student Details	


Result: The Advising Notes page for this student displays.

Advising Notes

TC Cat

*Change Advisee 

Use this page to view notes about the selected student. You can see and edit all of the notes for the student, regardless of who created the note or who (if anyone) the primary assignee (contact person) is.

 There are no notes. Click the Create Note button if you would like to add a note for an individual.

4. Use the **create a note** button.

Result: A new Advising Note template for the student displays.

Advising Notes

TC Cat


Enter an advising note and click Submit when done.

Group Box

*Institution

*Category

*Subcategory

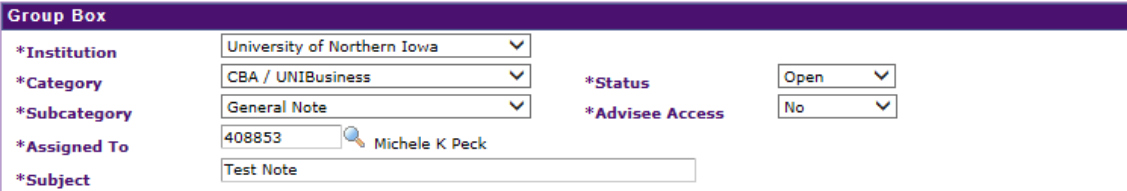
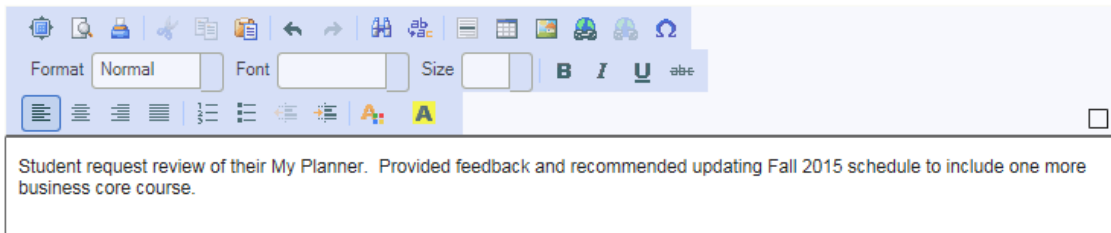
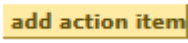
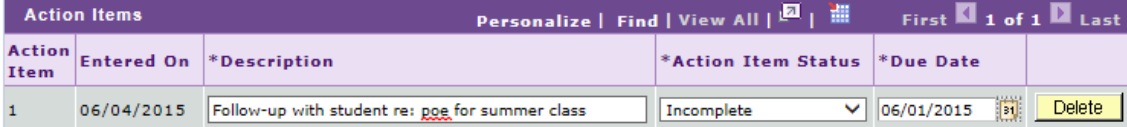
*Assigned To  Michele K Peck

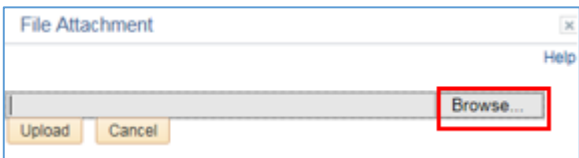
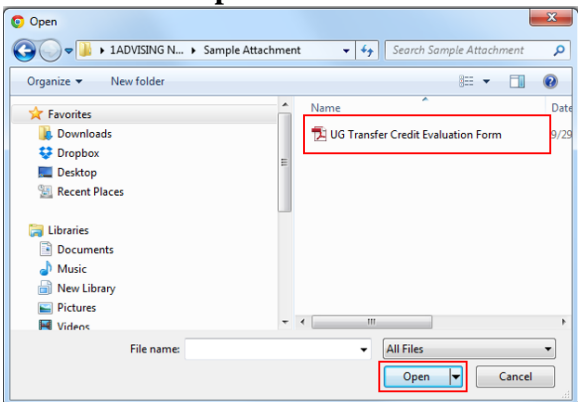
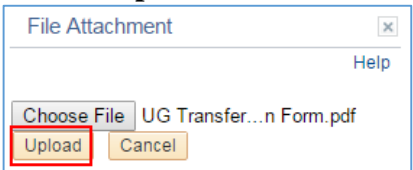
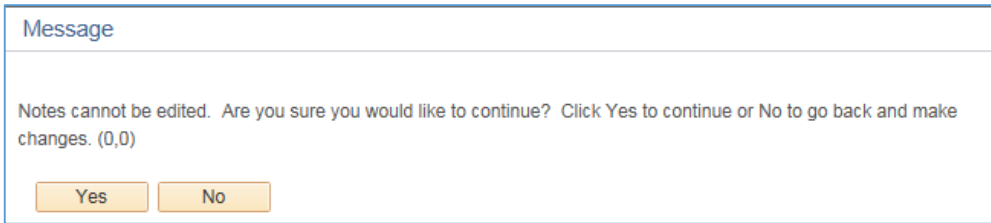
*Status

*Advisee Access

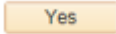
*Subject

Format Font Size **B** *I* U abc

<p>5.</p>	<p>Complete the following fields:</p> <ul style="list-style-type: none"> • Institution – Select <i>University of Northern Iowa</i> • Category – Select the appropriate category from drop-down list. • Subcategory – Select the appropriate subcategory from drop-down list. • Assigned To – Defaults to <i>user</i>, may be updated if you also wish to share to another user’s “My Advising Notes” list. • Subject – Enter free form text as appropriate. Maximum characters: 50. If using the <i>Subject</i> field in reporting or sorting, then use consistent characters and spaces. • Status – Defaults to <i>open</i>. <ul style="list-style-type: none"> • <i>Open</i> – Note may be appended. • <i>Closed</i> – Note may no longer be appended and is “view only”. • Advisee Access – N/A. UNI does not allow advisee access to notes in Student Center. 
<p>6.</p>	<p>Enter note item/comment.</p> <p>Note: Use the text editor toolbar to format text if desired. Hover over icon for a description.</p> 
<p>7.</p>	<p>To add an action item, click the add action item button.</p>  <p>Enter a Description.</p> <p>If the action is not done, indicate Status of Incomplete. Update to Complete when done.</p> <p>Enter a Due Date.</p>  <p>Note: Action Item Status and Due Date can be used in My Advising Notes.</p>

<p>8.</p>	<p>To add an attachment, click the add attachment button.</p> <p>add attachment</p> <p>Upload a document that is saved to your computer or network. Click the Browse button to select a saved file.</p>  <p>Select the file and Open it.</p>  <p>Then use the Upload button.</p> 
<p>9.</p>	<p>Click the Submit button.</p> <p>SUBMIT</p> <p>Result: A confirmation message displays.</p>  <p>Note: The saved note item/comment can no longer be edited. However, additional note item/comments can be added within this advising note. Also, other fields, action items and attachments can be edited even after the note is saved.</p>

10. Click the **Yes** button on the confirmation message to save the note.

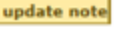


Result: The **note item/comment** is saved.

Advising Notes


TC Cat

Advising Note			
Institution	University of Northern Iowa	Created On	06/01/2015
Category	CBA / UNIBusiness	Created By	Michele K Peck
Subcategory	General Note	Note Status	Open
Assigned To	Michele K Peck	Advisee Access	No
Subject	Test Note		



Note Items			
Note Item	Entered On	Entered By	Comment
1	06/01/2015	Michele K Peck	Student request review of their My Planner. Provided feedback and recommended updating Fall 2015 schedule to include one more business core course.

Note: *Note Item 1* in this example cannot be changed, however, the *Advising Note* can be updated from the *update note* button.







11. To **view** or **add to** a previously saved note, go to *My Advisees* tab.



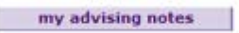
Faculty Center | Advisor Center | Search | Learning Management

my advisees || student center || general info || transfer credit || academics

My Advisees

Select display option: Link to Photos Include photos in list

	Notify	Name	ID	View Student Details	Advising Notes
1	<input type="checkbox"/>	Cat,TC	668507	View Student Details	
2	<input type="checkbox"/>	Panther,PB	671930	View Student Details	
3	<input type="checkbox"/>	Student,Sample Panther	675295	View Student Details	
4	<input type="checkbox"/>	Torus,Vic	670538	View Student Details	


12. Click the **Advising Notes** icon for the appropriate student.

	Notify	Name	ID	View Student Details	Advising Notes
1	<input type="checkbox"/>	Cat,TC	668507	View Student Details	
2	<input type="checkbox"/>	Panther,PR	671930	View Student Details	


Result: The Advising Notes page for that student displays previously entered notes.

Advising Notes

TC Cat

*Change Advisee 

Use this page to view notes about the selected student. You can see and edit all of the notes for the student, regardless of who created the note or who (if anyone) the primary assignee (contact person) is.

Advising Note	Created By	Assigned To	Institution	Subject	Category	Subcategory	Note Status	Action Items	Last Updated
	Michele K Peck	Michele K Peck	University of Northern Iowa	Test Note	CBA / UNIBusiness	General Note	Open	None	06/01/2015

13. Select the **Advising Notes** icon  for the note you wish to view.

Advising Note	Created By	Assigned To	Institution	Subject	Category	Subcategory	Note Status	Action Items	Last Updated
	Michele K Peck	Michele K Peck	University of Northern Iowa	Test Note	CBA / UNIBusiness	General Note	Open	None	06/01/2015
	Michele K Peck	Michele K Peck	University of Northern Iowa	Midterm Grades	CBA / UNIBusiness	General Note	Open	None	06/01/2015

Note: If the student has multiple notes, you may sort by clicking a column header.

Result: The Advising Note displays.

Advising Note

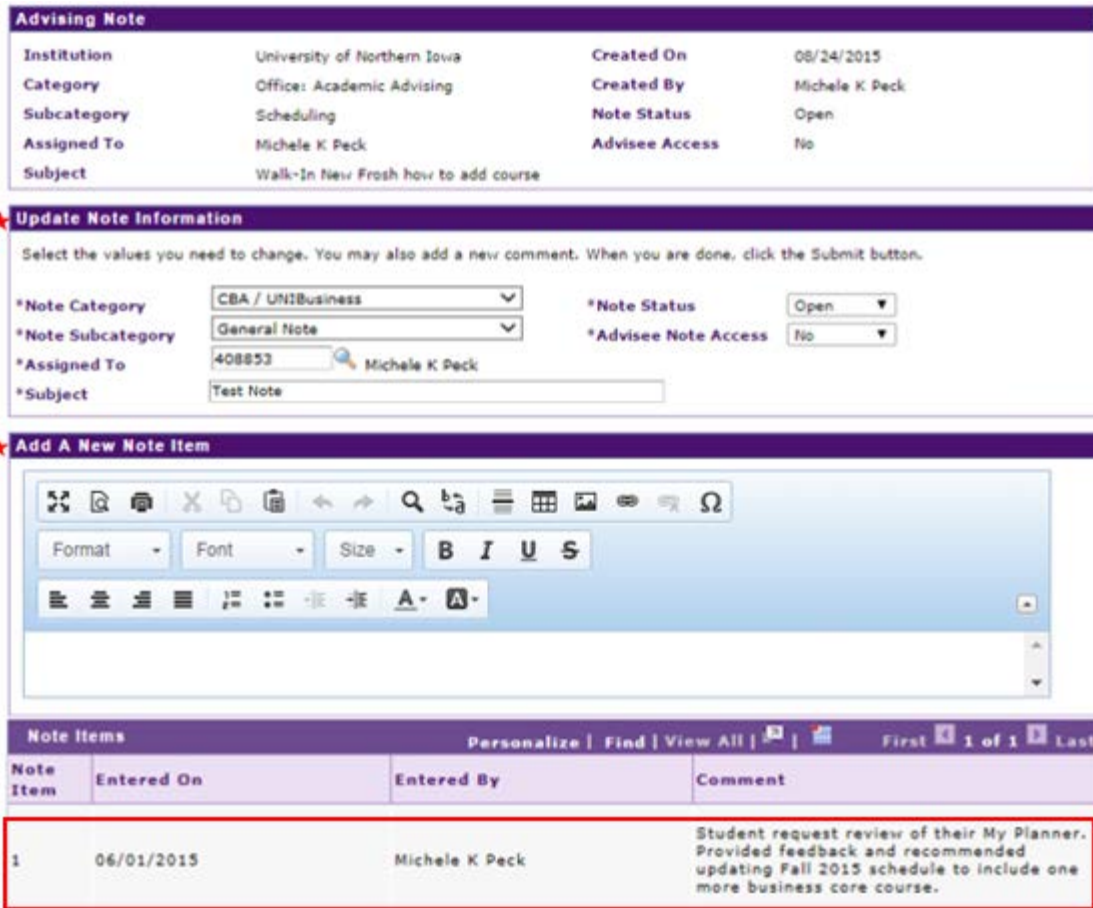
Institution	University of Northern Iowa	Created On	06/01/2015
Category	CBA / UNIBusiness	Created By	Michele K Peck
Subcategory	General Note	Note Status	Open
Assigned To	Michele K Peck	Advisee Access	No
Subject	Midterm Grades		

Note Item	Entered On	Entered By	Comment
1	06/01/2015	Michele K Peck	Student shared concerns about midterm grades. Study habits discussed. Referred to ALC.

14. To edit the note, use the *update note* button.

update note

Result: The saved note opens. The original note item (comment) is closed to editing, however a **new note item** (comment) can be added. Fields in the **Note Information** section, **Action Items** and **Attachments** may also be updated.



Advising Note

Institution	University of Northern Iowa	Created On	06/24/2015
Category	Office: Academic Advising	Created By	Michele K Peck
Subcategory	Scheduling	Note Status	Open
Assigned To	Michele K Peck	Advisee Access	No
Subject	Walk-In New Fresh how to add course		

★ Update Note Information

Select the values you need to change. You may also add a new comment. When you are done, click the Submit button.

*Note Category: CBA / UN2Business
 *Note Subcategory: General Note
 *Assigned To: 408853 Michele K Peck
 *Subject: Test Note

*Note Status: Open
 *Advisee Note Access: No

★ Add A New Note Item

Rich text editor with toolbar (Bold, Italic, Underline, Strikethrough, etc.) and a text area.

Note Items

Note Item	Entered On	Entered By	Comment
1	06/01/2015	Michele K Peck	Student request review of their My Planner. Provided feedback and recommended updating Fall 2015 schedule to include one more business core course.

After updates are complete, select the **Submit** button to save updates and use the **Return** button to return to the previous screen.

SUBMIT **RETURN**