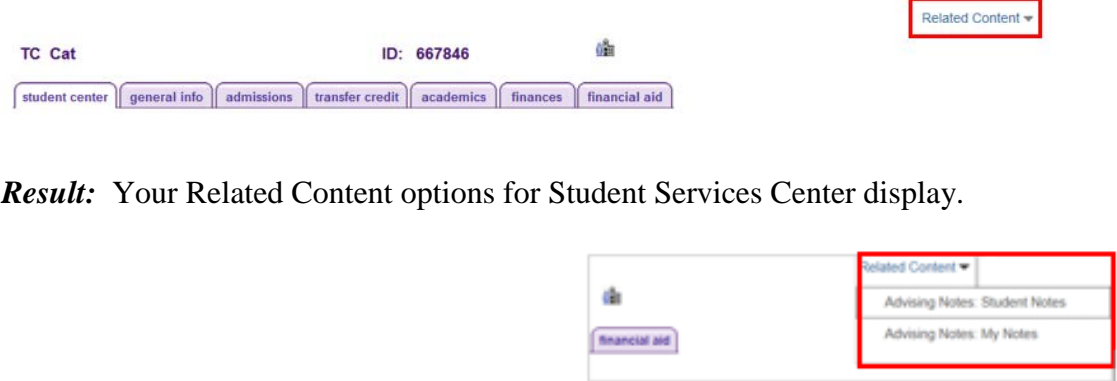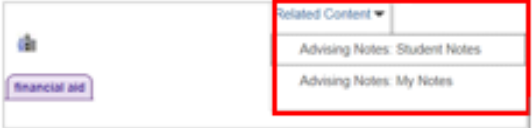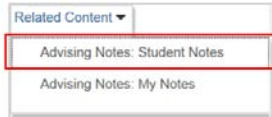# Creating Advising Notes using Student Services Center

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

Step	Action
1.	Log into **Campus Solutions** and navigate to Student Services Ctr (Student) Main Menu > Campus Community > Student Services Ctr (Student); enter search criteria. *Result:* Student Services Center opens with the **Student Center** tab displayed.
2.	Select the **Related Content** drop down in the top right corner of the page. *Result:* Your Related Content options for Student Services Center display.

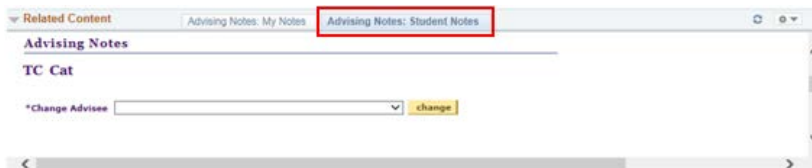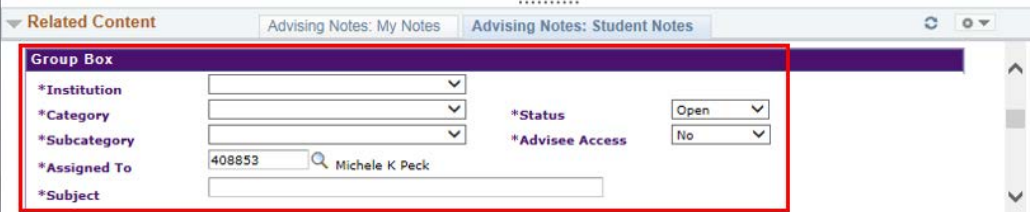|	
3.	Select the **Advising Notes: Student Notes** option. *Note*: Selecting either option will open related content. Some browsers cut off the words, but the links will work. *Result: Related Content* opens in a split screen view. Both Student Center and Related Content pages remain open at the same time in the same browser window.
4.	Within *Related Content*, both *Advising Notes tabs* display. The student's *Advising Notes* page is open. *Note:* to switch to *My Advising Notes*, select the *Advising Notes: My Notes* tab.
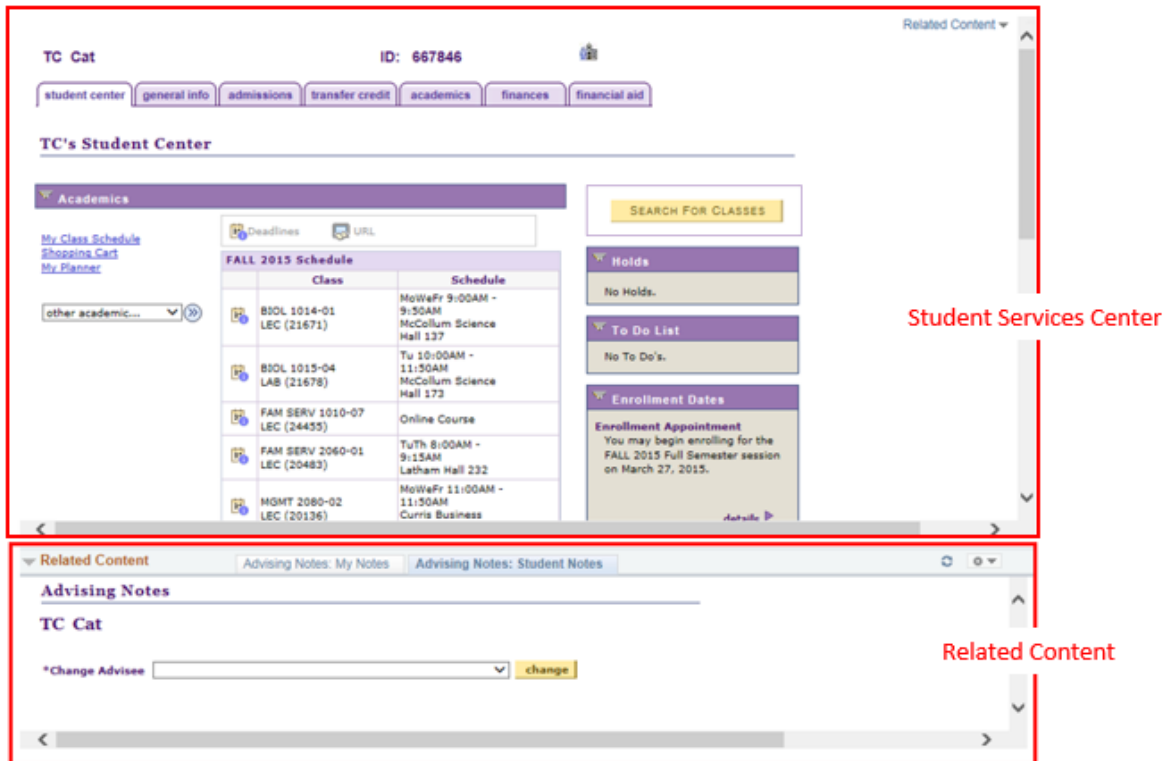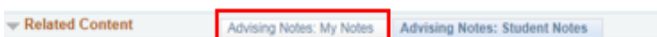
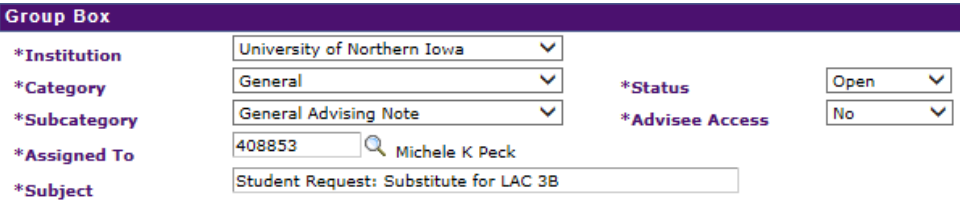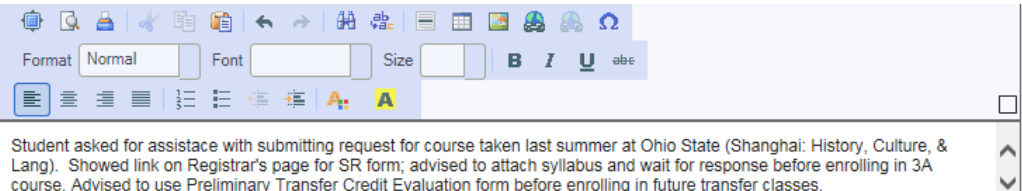| 5.	Using the scroll bar on the right side of the page, scroll down to find any previously entered notes and the *create a note* button. Hit *create a note*.
	Result: A new advising note appears in the Related Content area.
6.	Complete the following fields:
	• **Institution** – Select *University of Northern Iowa*
	• **Category** – Select the appropriate category from drop-down list.
	• **Subcategory** – Select the appropriate subcategory from drop-down list.
	• **Assigned To** – Defaults to *user*, may be updated if you also wish to share to another user's "My Advising Notes" list.
	• **Subject** – Enter free form text as appropriate. Max characters: 50. If using the *Subject* field in reporting or sorting, use consistent characters and spaces.
	• **Status** – Defaults to *open*.
	• *Open* – Note may be appended.
	• *Closed* – 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.
7.	Enter **note item/comment.**
	Note: Use the **text editor toolbar** to format text if desired. Hover over icon for a description.

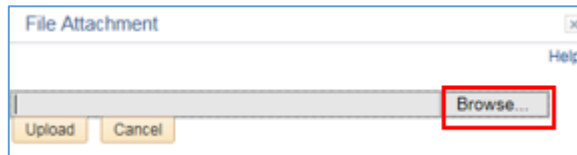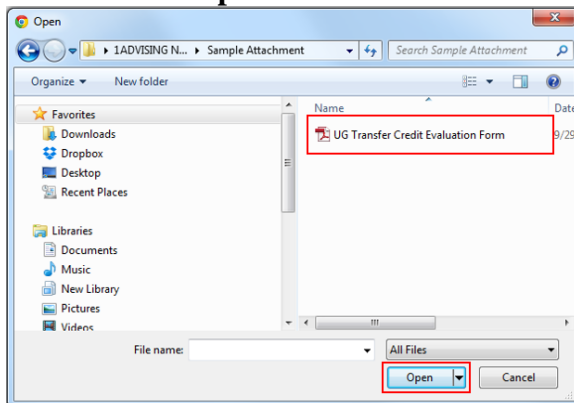| 8.	To add an action item, click the **add action item** button.
	add action item
	Enter a *Description*. If the action is not done, indicate *Status* of *Incomplete*. Update to *Complete* when done. Enter a *Due Date*.
	Action Items — Personalize | Find | View All | 🔁 | 🏢 — First ◀ 1 of 1 ▶ Last
		Action Item	Entered On	*Description	*Action Item Status	*Due Date	
1	08/10/2015	Send Transfer Credit Evaluation Form link	Incomplete ▾	08/28/2015 📅	Delete	
	Note: Action Item Status and *Due Date* can be used in *My Advising Notes*.
9.	To add an attachment, click the **add attachment** button.
	add attachment
	Upload a document that is saved to your computer or network. Click the **Browse** button to select a saved file.
	File Attachment ⊠ Help [ ] Browse... Upload Cancel
	Select the file and **Open** it.
	Open dialog box: 1ADVISING N... ▸ Sample Attachment — File name: — All Files — Open ▾ Cancel — UG Transfer Credit Evaluation Form
	Then use the **Upload** button.
	File Attachment ⊠ Help Choose File UG Transfer...n Form.pdf Upload Cancel
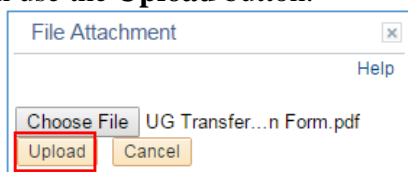
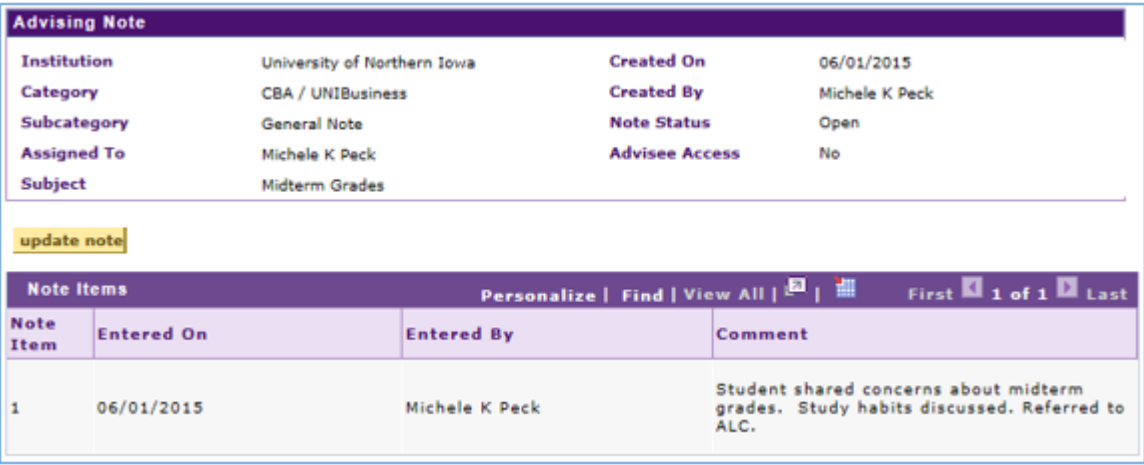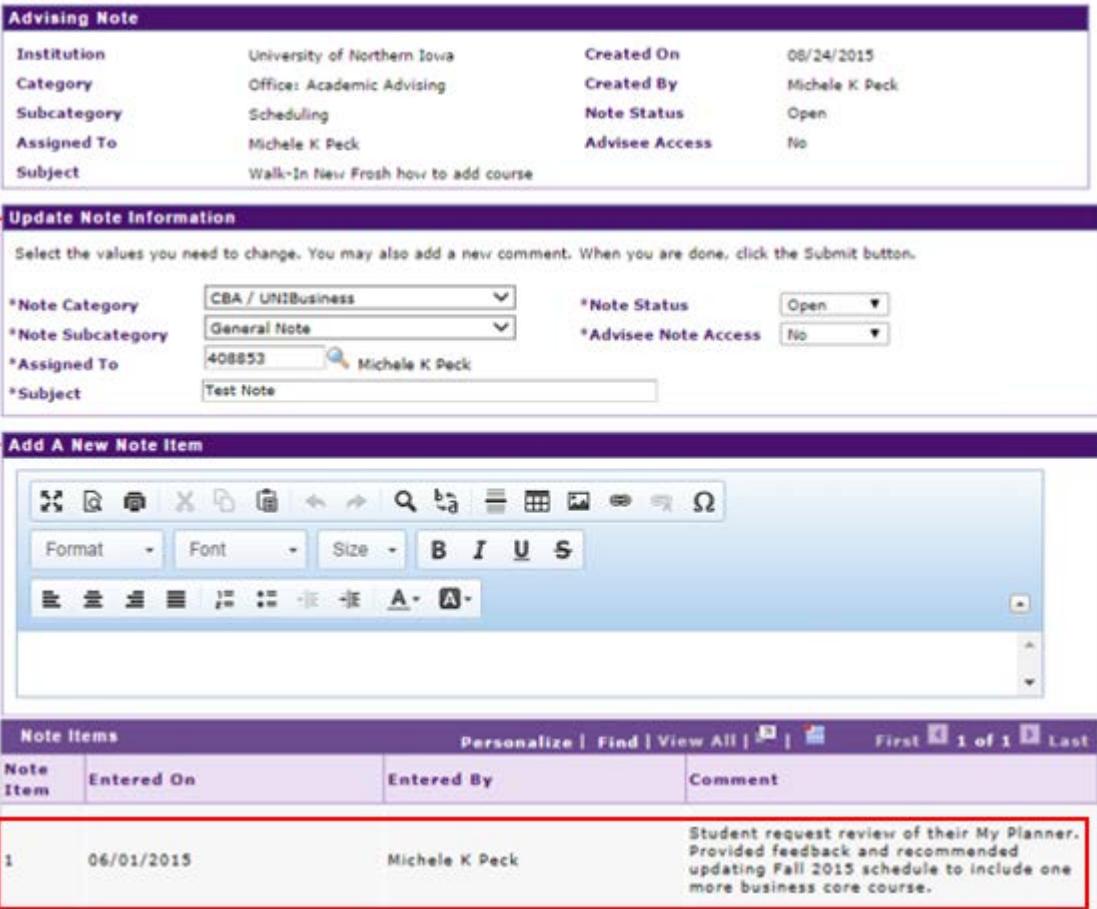| 10.	Use the **Submit** button.
	SUBMIT
	Result: A confirmation message displays.
	Message
	Notes cannot be edited. Are you sure you would like to continue? Click Yes to continue or No to go back and make changes. (0,0)
	Yes No
	Note: The saved note item/comment can no longer be edited. However, additional 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.
11.	Use the **Yes** button on the confirmation message to save the note.
	Yes
	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
	update note
	Note Items Personalize | Find | View All | 🔄 | 🔳 First ◀ 1 of 1 ▶ Last
	Note Item: 1 Entered On: 06/01/2015 Entered By: Michele K Peck Comment: 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.
	update note
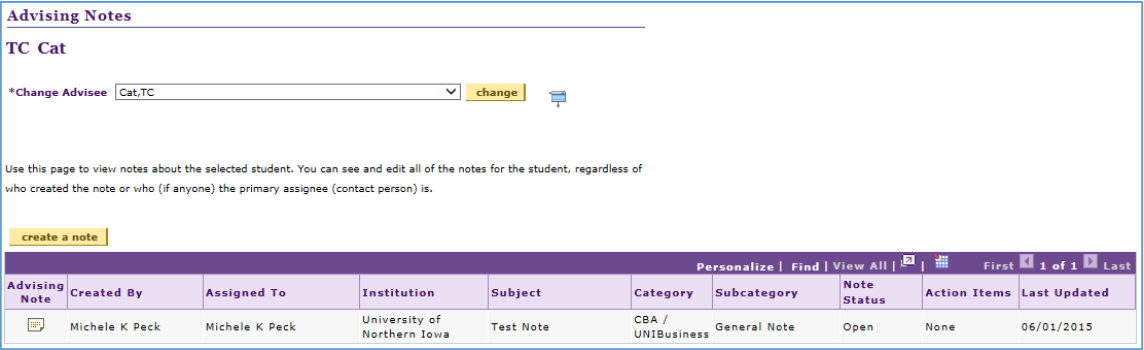
12.	To view or update a previously saved note, follow steps 1 – 4 of this guide. ***Result***: The Advising Notes page for that student displays previously entered notes.
13.	Select the ***Advising Note*** icon for the note you want to view. ***Note:*** If the student has multiple notes, you may sort by clicking a column header. ***Result***: The Advising Note displays.
14.	To edit the note, use the ***update note*** button. ***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	08/24/2015
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 Frosh 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 / UNIBusiness	*Note Status	Open
*Note Subcategory	General Note	*Advisee Note Access	No
*Assigned To	408853 Michele K Peck		
*Subject	Test Note		

★ **Add A New Note Item**

Note Items   Personalize | Find | View All | 🖻 | 🛗   First ◀ 1 of 1 ▶ Last

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

| 15. | **Additional Related Content Features**: |

Within the **Related Content menu bar**, there are several options.

▼ Related Content   Advising Notes: My Notes   **Advising Notes: Student Notes**   ↻ ☼ ▼

↻ **Refresh Page**: use when you change the student in Student Services Center and the Advising Note shows the previous student. A better practice is to close related content after saving notes on a student.

☼ ▼ **Pagelet Settings**: use to **Close** related content. Use to open Advising Notes in a **New Window**. Then close the original Related Content pagelet. This will allow more space to see Advising Notes. You can change Student Services Center tabs without closing Advising Notes.