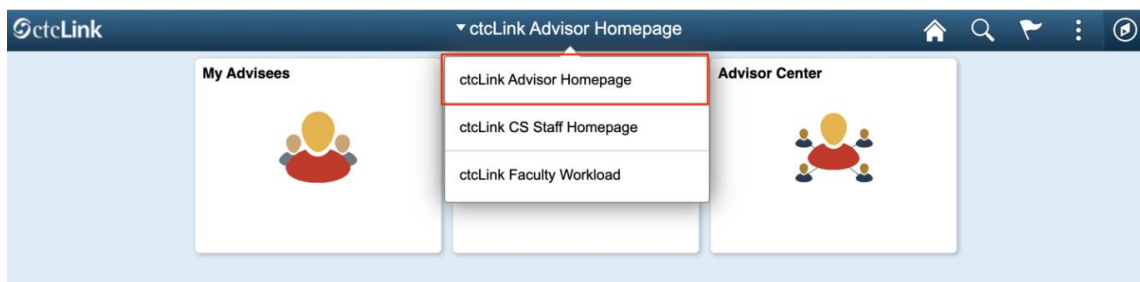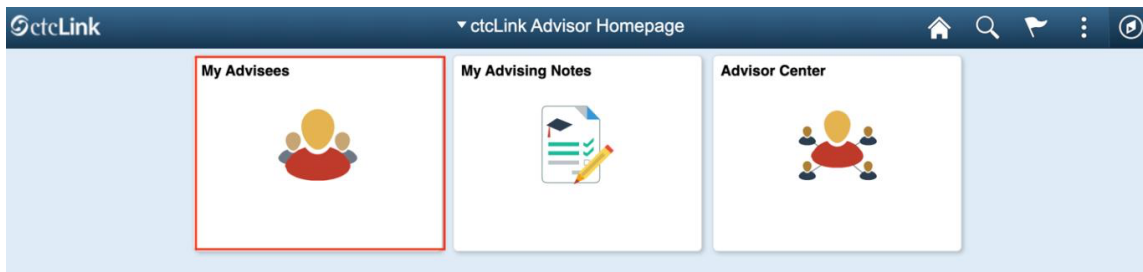# How to Create an Advising Note Through My Advisees

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

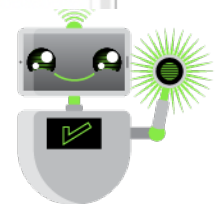1. If you are not already on the **Advisor Homepage**, use the drop-down menu to navigate there.

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.

Part 1: Create a Note

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

7. Another **Advising Notes** page displays.
   o **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 **Subcategor**y.
11. Add any text to the **Subjec**t 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
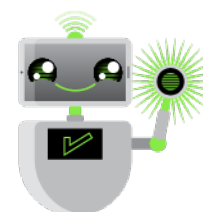
17. The **Add a New Note Item** pagelet will display.
18. Enter a message in the field provided.
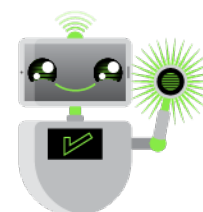19. Click the **Apply** button.

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.
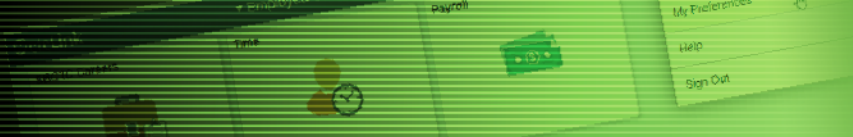26. Click the **Add Action Item** button.

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.

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.
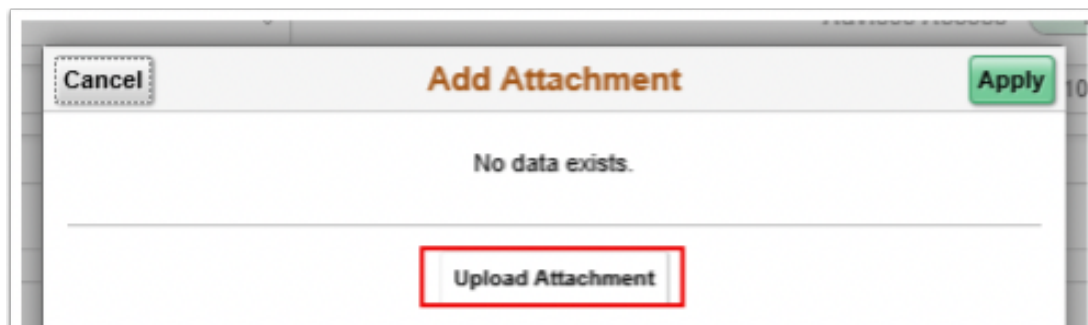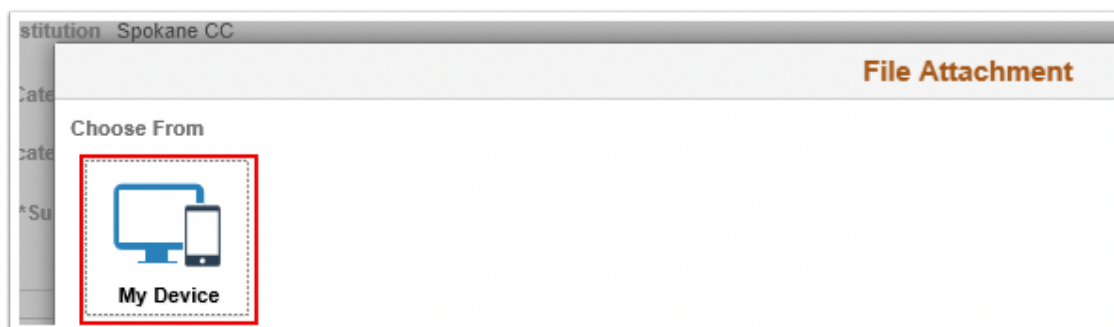40. Click the **Add Attachment** button if you want to add an attachment.

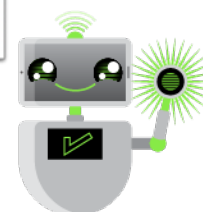**Part 4:** Add Attachment (if needed)

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

43. The **File Attachment** pagelet will display.
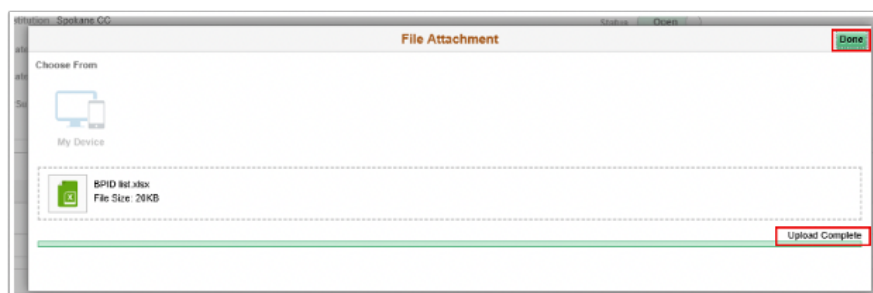44. Click the **My Device** button to view files on your device.

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.
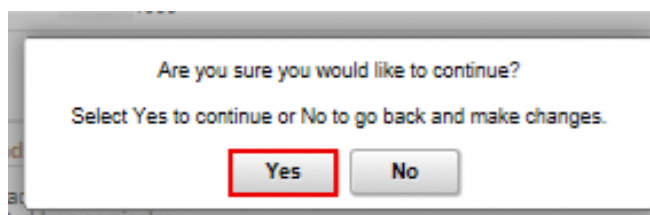54. Click the **Apply** button.
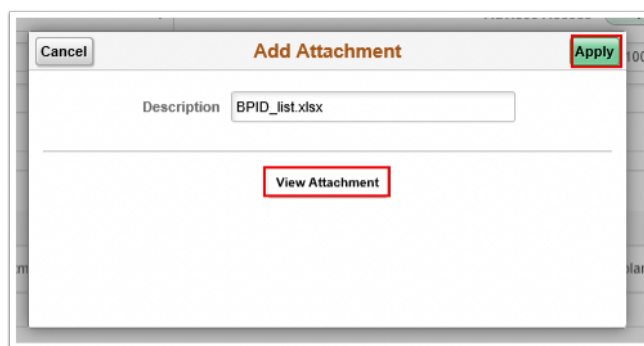
Part 5: Submit Advising Notes

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.
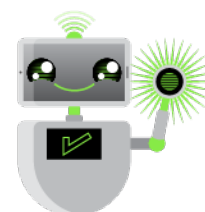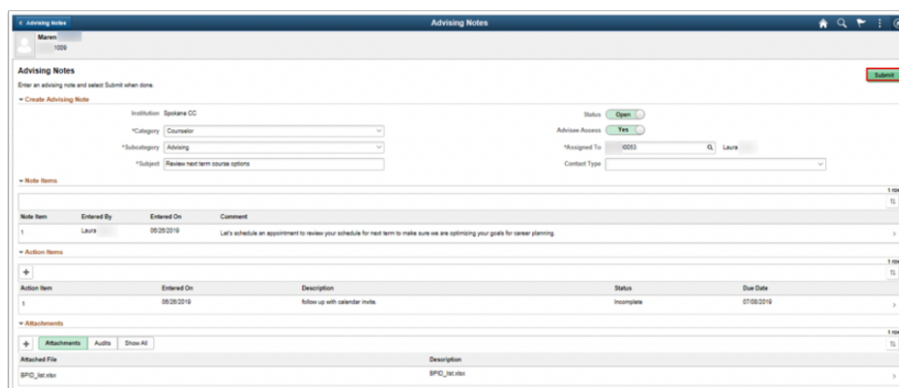
58. A message pagelet will display asking if you are sure you want to continue.
59. Click the **Yes** button.

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.
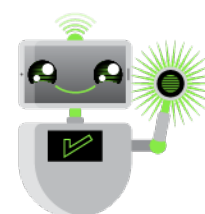
64. The **Additional Recipients Lookup** pagelet will display.
65. Complete any of the following fields:
    - **First Name**
    - **Last Name**
    - **Empl ID**
66. Click the **Search** button.
67. Click the checkbox for the recipient identified in the **Search Results**.
68. Click the **Continue** button.

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

72. A confirmation message will display.
73. Click the **Yes** button.
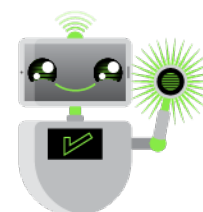
74. The **Notifications History** section of the page will display (scroll to bottom of page).
75. Click one of the results from the bottom of the page.

76. The **Notification Details** page will display.
77. Click the **[X]** at the top right to close.

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.