

9.2 Create an Advising Note Category and Subcategory

Purpose: Use this document as a reference to create an Advising Note Category and Subcategory.

Audience: Academic Advisors

! You must have at least one of these local college managed security roles:

- ZD SACR AA Config
- ZD CS ADVISEMENT SETUP
- ZD SACR Advisement Config
- ZZ CS Advisement Setup
- ZZ SACR Advisement Config

You will also need a college specific role to view and/or create an advising note for a student.

- ZZ Advising Notes - 010 (e.g., Peninsula College)
- ZD Advising Notes - 010 (e.g., Peninsula College)

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

The Note Category Table defines Advising Note Categories that can be organized into Subcategories and assigned to students. Additionally, this page defines security access for Advising Notes if enabled in the Self-Service Academic Advising setup.

Note Category Table

i A **Note Category** is selected when assigning an advising note to a student. Categories must be configured before creating Note Subcategories.

Navigation: NavBar > Navigator > Set up SACR > Product Related > Academic Advisement > Note Category Table

1. The **Note Category Table** search page displays.
2. Select the **Add a New Value** tab.
3. Enter or look up the **Academic Institution**.
4. Enter a name for the new **Note Category**.
5. Click **Add**.

6. The **Note Category** tab displays.
7. In the **Details** panel, enter an **Effective Date**.
8. **Status** = Active.
9. Enter a **Description** - max 30 characters.
10. Enter a **Short Description** - max ten characters.
11. Select **Save**.

Access Control

1. Select the **Access Control** tab.

< Contributor Relations Homepage **Note Category Table**

Note Category **Access Control**

Academic Institution WA220 Tacoma Community College
Note Category RESIDENCY

Details Find | View All 1 of 1

*Effective Date 01/01/1901 *Status Active

*Description Residency Documents

*Short Description Residency

Save Notify Add Update/Display Include History Correct History

Note Category | Access Control

2. Select a **Type** from the drop-down menu.
 - a. **Role** - If using role access, ensure only your college specific role is assigned (example: ZZ Advising Notes - 010 (Peninsula College)). The CS Support Team may also assign support team roles to assist in troubleshooting tickets.
 - b. **User** - Add an employee's EMPLID.
 - c. **Permission List** - Use either Role or ID. Permission List refers to the **primary** Permission List on the User profile.
3. Enter or look up the **Value** depending on the Role or User Type.

< Contributor Relations Homepage **Note Category Table**

Note Category **Access Control**

Academic Institution WA220 Tacoma Community College
Note Category RESIDENCY

Note Category Access Personalize | Find | View All | 1 of 1 | First | Last

Type	*Value	Description	View	Update	Create	View All	Update All	Super User
1 Role	ZZ Advising Notes - 22		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Notify Add Update/Display Include History Correct History

Note Category | Access Control

7. Select the applicable checkboxes to grant access:
 - a. **View** – Select to allow users to view notes created by themselves or assigned to them in this note category.
 - b. **Update** – Select to allow users to view and update notes created by themselves or assigned to them in this note category.
 - c. **Create** – Select to allow users to create notes in this note category.
 - d. **View All** – Select to allow users to view all notes created by users in this note category.
 - e. **Update All** – Select to allow users to view and update all notes created by any user in this note category.
 - f. **Super User** – Select to allow users to view and update all notes created by any user in this note category. A super user can also change categories, update Note Item text, and delete notes in this note category.

Contributor Relations Homepage Note Category Table

Note Category Access Control

Academic Institution WA220 Tacoma Community College
Note Category RESIDENCY

Type	*Value	Description	View	Update	Create	View All	Update All	Super User
1 Role	ZZ Advising Notes - 220	ZZ Advising Notes - 220	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Notify Add Update/Display Include History Correct History

8. Select **Save**.

Note Subcategory Table

i A Note Category must be configured before creating a **Note Subcategory**. Users with security access to a Note Category will have the same access to view, update or create advising notes for all of the related note subcategories.

Navigation: NavBar > Navigator > Set up SACR > Product Related > Academic Advisement > Note Category Table

1. The **Note Subcategory Table** search page displays.
2. Select the **Add a New Value** tab.
3. Enter or look up the **Academic Institution**.
4. Enter or look up the **Note Category**.
5. Enter a name for the new **Note Subcategory**.
6. Click **Add**.

Note Category User Access Note Subcategory Table

Note Subcategory Table

Find an Existing Value Add a New Value

Academic Institution WA220
Note Category RESIDENCY
Note Subcategory Military

Add

6. The **Note Subcategory Table** page displays.

7. In the **Details** panel, enter an **Effective Date**.
8. **Status** = Active.
9. Enter a **Description** - max 30 characters.
10. Enter a **Short Description** - max ten characters.
11. Add additional note subcategories to the selected note category by selecting the **plus [+] icon**. Rows cannot have the same Effective Date.
12. Select **Save**.

The screenshot shows the 'Note Subcategory Table' interface. At the top, there is a navigation bar with a back arrow and the text 'Note Category User Access', and a title 'Note Subcategory Table'. Below this, the table header shows 'Academic Institution WA220 Tacoma Community College', 'Note Category RESIDENCY Residency Documents', and 'Note Subcategory MILITARY'. The 'Details' panel is open, showing fields for '*Effective Date' (01/01/1901), '*Status' (Active), '*Description' (Military Orders), and '*Short Description' (Mil Orders). A red box highlights the '*Effective Date' and '*Status' fields. A red arrow points to the plus icon next to the '*Status' field. A text box on the right says 'Add additional note subcategories to the selected note category by selecting the plus [+] icon.' At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

13. Process complete.