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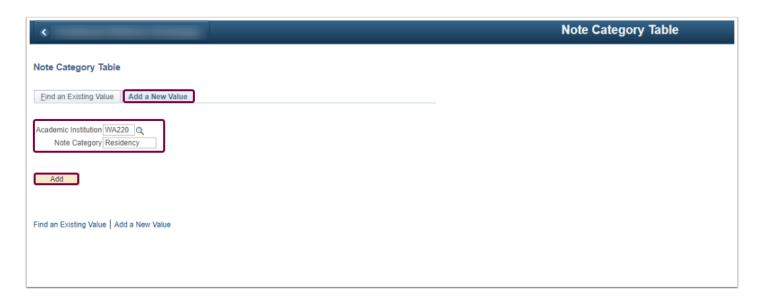
The Note Category Table defines Advising Note Categories that can be organized into Subcategories and assigned to students. Additionally, this page defines security access for Advising Notes if enabled in the Self-Service Academic Advising setup.
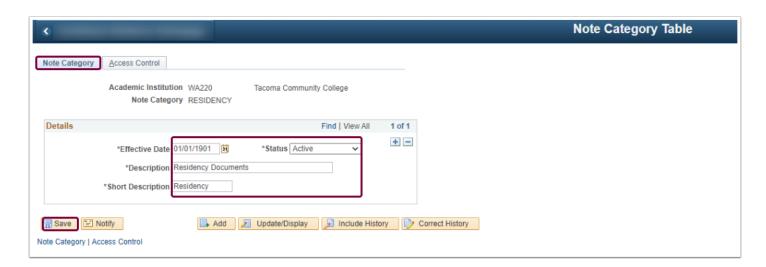
## Note Category Table

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**.
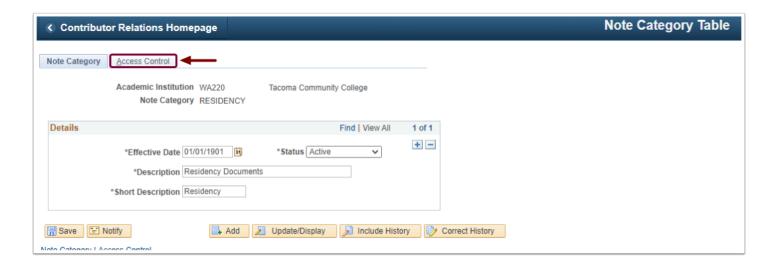4. Enter a name for the new **Note Category.**
5. Click **Add**.



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.
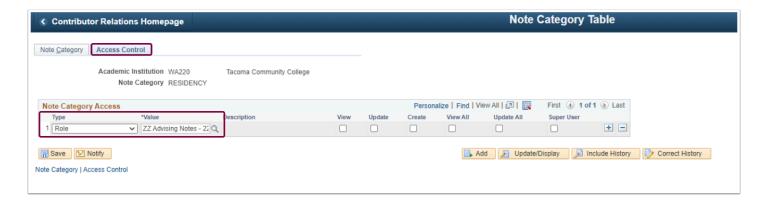10. Enter a **Short Description** - max ten characters.
11. Select **Save**.



# Access Control

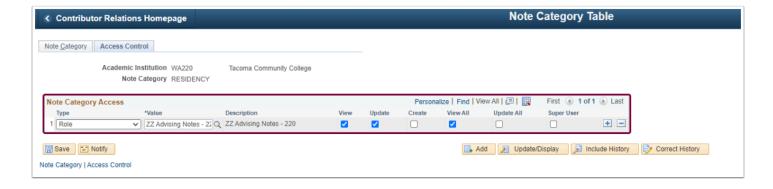1. Select the **Access Control** tab.

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.



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.
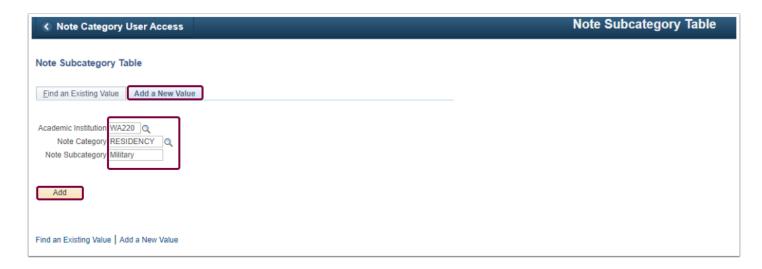
8. Select **Save**.

# Note Subcategory Table

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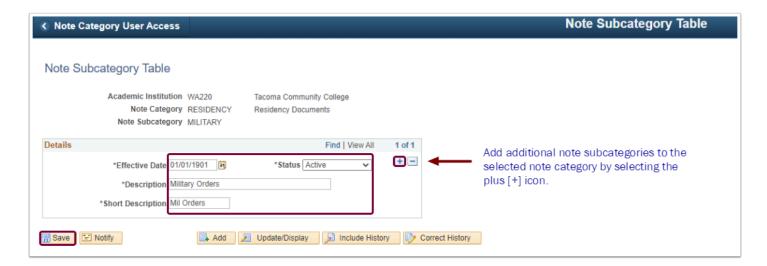
**Navigation: NavBar > Navigator > Set up SACR > Product Related > Academic Advisement > Note Category Table**

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**.



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**.



13. Process complete.