

9.2 Entering Advising Notes in Advisor Center

Purpose: Use this document as a reference for how to enter an Advising Note in Advisor Center in ctcLink.

Audience: Academic Advisors.

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

- ZZ SS Advisor

You must also set these SACR Security permissions:

- [CS 9.2 SACR Security: Basic Requirements for Staff](#)

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

i Details:

- Advising Notes are used by faculty and staff with "advisor" access to make advising comments
- Advising Notes can be made visible (or not) to the student
- Advising Notes provide a historical record of communication interactions between students and staff
- You can store, retrieve and share Advising Notes
- Advising Notes cannot be deleted
- All Advising Notes are part of the student's record under FERPA regulations. If an advisor selects not to have a note available to the student through Self-Service, the student may still file a request to view all notes.

Related QRGs:

- [Create an Advising Note Category and Subcategory](#)
- [Assign Access to Advising Notes – Note Category Access](#)
- [Entering Advising Notes in Advisor Center](#)

- [Create a Fluid Advising Note through the Advisor Homepage](#)
- [View and Notify My Advisees \(Fluid\)](#)
- [Create an Advising Note through My Advisees \(Fluid\)](#)
- [Update an Advising Note through My Advisees \(Fluid\)](#)
- [View my Advising Notes \(Student\)](#)

Entering Advising Notes in Advisor Center

Navigation: Self Service > Advisor Center > My Advisees

1. The **My Advisees** page displays.
2. Select the **Advising Note** icon next to the applicable student.

My Advisees


Joyce Merrill



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"/>	Kennedy, Jacqueline G	201461610	View Student Details	

Personalize | Find |  


Notify Selected Advisees | Notify All Advisees | My Advising Notes

View data for other students

 Go to top

3. Review previous notes or select **Create a Note** to enter a new Advising Note.

My Advisees | **Advising Notes**

Jacqueline Kennedy 
201461610

Advising Notes

Use this page to view notes for the selected student.

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

Create a Note

4. The **Advising Notes** page displays. Complete required fields and enter note.
 - a. **Institution:** Select your college.
 - b. **Category:** Select the appropriate category from available options *Note - example shown may not be a valid value for your institution.
 - c. **Subcategory:** Select the appropriate subcategory from available options *Note - example shown may not be a valid value for your institution.
 - d. **Assigned to:** Your Empl ID will automatically populate this field. Do not change this value.
 - e. **Subject:** Enter a desired subject for the Advising Note.
 - f. **Status:** Select the desired status value.
 - g. **Advisee Access:**
 - **Yes** - allows the student to review the note in their Student Center.
 - **No** - the student cannot see the note in their Student Center.
 - h. Select the **Add Note Item** button.

The screenshot shows the 'Advising Notes' page in the Advisor Center. At the top, there is a header bar with the title 'Advising Notes' and a user profile for Jacqueline Kennedy (201401010). Below the header, there is a section titled 'Advising Notes' with a 'Submit' button. The main form area is titled 'Create Advising Note' and contains several fields: Institution (Clark College), *Category (Advising Services), *Subcategory (Academic Standards Appt.), *Subject (Review time), Status (Open), Advisee Access (Yes), *Assigned To (201253052), and Contact Type. The 'Add Note Item' button is highlighted with a red box. Below the form, there are sections for 'Note Items', 'Action Items', and 'Attachments', each with a corresponding 'Add' button.

5. The **Add a New Note Item** pagelet displays.
6. Enter the note.
7. Select the **Apply** button.

Add a New Note Item

Cancel Apply

It is that time of year again to review your career goals and make sure your course scheduling is moving you towards your graduation goals.

8. The **Advising Notes** page displays.
9. Review the **Note Items** section to see the new note.

Note Items				1 row
Note Item	Entered By	Entered On	Comment	
1	Joyce Merrill	06/26/2019	It is that time of year again to review your career goals and make sure your course scheduling is moving you towards your graduation goals.	>

10. ***OPTIONAL*** Select **Add Action Item** to create to-do's for yourself or the student.
 - a. **Description:** Input a desired Action Item description
 - b. **Action Item Status:** Select the applicable status
 - c. **Due Date:** Input the applicable due date.
 - d. Select the **Apply** button.

i Action Items are internal and not student-facing.

Action Items

No data exists.

Add Action Item

11. The **Advising Notes** page displays.
12. Note the newly added Action Item.

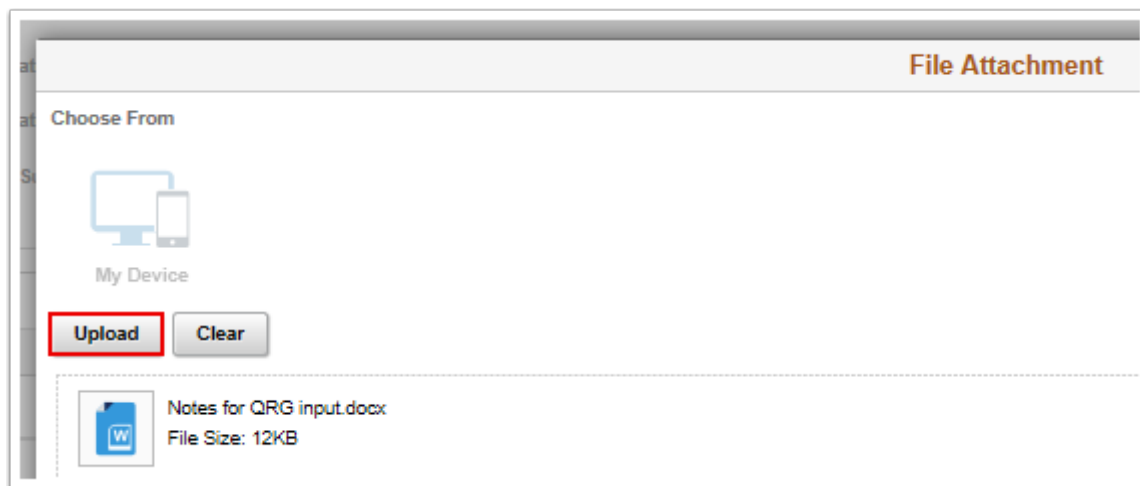
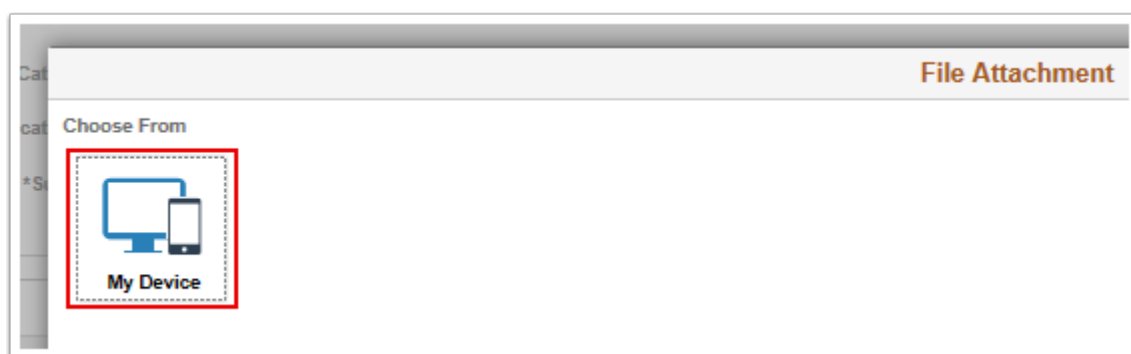
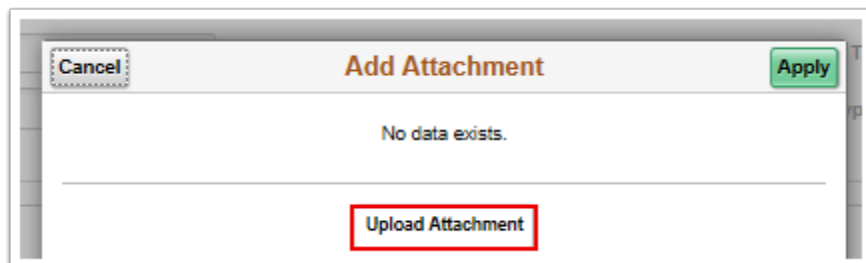
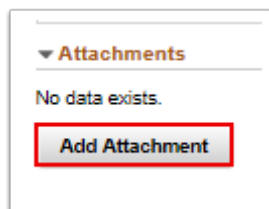
Action Items					1 row
Action Item	Entered On	Description	Status	Due Date	
1	06/26/2019	Verify response	Incomplete	07/01/2019	>

i Queries: Find advising notes with attachments.

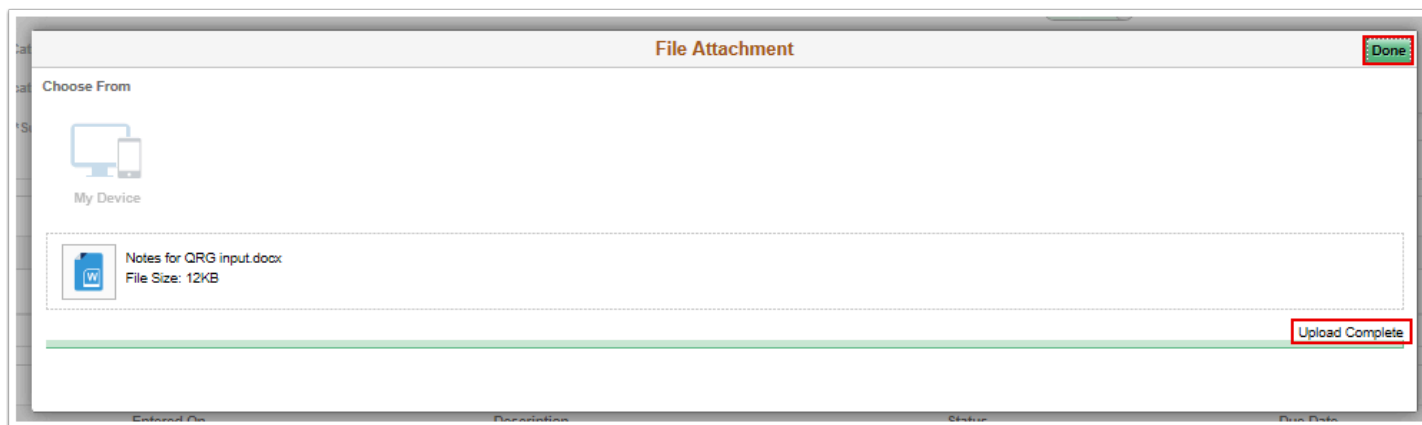
- **QCS_AA_ADVISING_NOTES**
- **QCS_AA_ADV_NOTES_BY_EMPLID**

To access the most up-to-date query information, visit dataservicesmetalink.sbctc.edu. In addition, discover the best methods for finding queries and reports by visiting [Recommended Methods for Searching Queries and Reports](#).

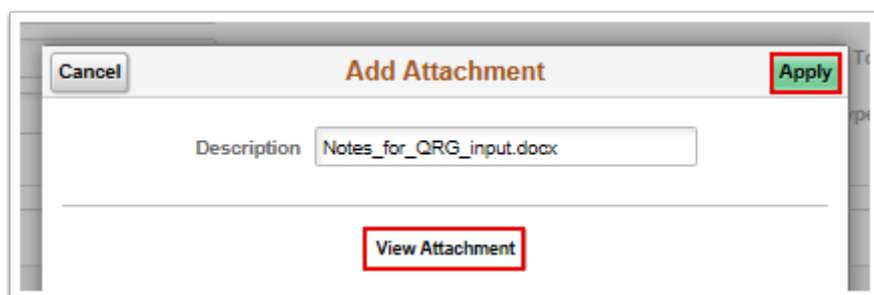
13. ***OPTIONAL*** Add attachment(s) applicable to the Advising Note.
 - a. Select the **Add Attachment** button.
 - b. The **File Attachment** page displays.
 - c. Select the **My Device** tile.
 - d. The device file search page displays.
 - e. **Choose File, select Open,** then select the **Upload** button.



14. The **Upload Complete** button displays.
15. Select the **Done** button.



16. The **Add Attachment** page displays.
17. Select the **View Attachment** button.
18. A new window displays the results. Close the window when done viewing.
19. Select the **Apply** button.



20. The **Advising Notes** page displays.
21. Note the attached file listed in the **Attachments** section.
22. Select the **Submit** button.

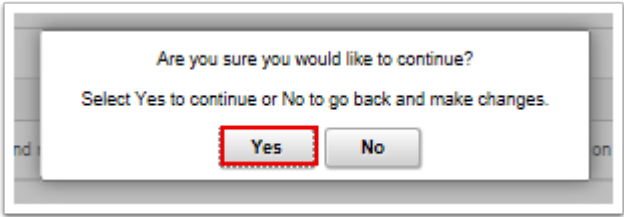
Note Item	Entered By	Entered On	Comment
1	Joyce Merrill	06/28/2019	It is that time of year again to review your career goals and make sure your course scheduling is moving you towards your graduation goals.

Action Item	Entered On	Description	Status	Due Date
1	06/28/2019	Verify response	Incomplete	07/01/2019

Attached File	Description
Notes_for_QRG_input.docx	Notes_for_QRG_input.docx

23. A **Message** page displays.

24. If satisfied, select **Yes** on the warning message to save your note.



25. **Note:** The Advising Note has now been saved. If made accessible, the student can now review this note in their Student Center.
26. The **Advising Notes** page displays.
27. ***OPTIONAL*** If desired, select **Notify** to send the student notification of your Advising Note.
- a. Select the **Notify** button.

A screenshot of the "Advising Notes" page in a web application. At the top, there's a header for "Jacqueline Kennedy" with ID "201491610". Below this, the "Advising Notes" section has a "Notify" button (highlighted with a red box) and an "Update Note" button. The main content area shows details for an "Advising Note":

- Institution: Clark College
- Category: Advising Services
- Subcategory: Academic Standards Appt.
- Assigned To: Joyce Merrill
- Subject: Review time
- Created On: 09/29/2019
- Created By: Joyce Merrill
- Status: Open
- Advisee Access: Yes

Below this, there's a "Note Items" section with a table:

Note Item	Entered By	Entered On	Comment
1	Joyce Merrill	09/29/2019	It is that time of year again to review your career goals and make sure your course scheduling is moving you towards your graduation goals.

At the bottom, there's an "Action Items" section with a table:

Action Item	Entered On	Description	Status	Due Date
1	09/29/2019	Verify response	Incomplete	07/01/2019

28. The **Notify** page displays.
29. Select the checkbox for the person to be notified.
30. Enter an optional message and select the **Send** button.
31. A confirmation message will display.
32. Select the **Yes** button.

Notify

Cancel Send

▼ Recipients

Notify	Name / ID	Role
<input checked="" type="checkbox"/>	Jacqueline Kennedy 201461610	Advisee
<input type="checkbox"/>	Joyce Merrill 201253052	Created By / Assigned To

▼ Send Notification

Select additional recipients using the recipient lookup button. Recipients should be separated by a semicolon.

To:

Additional message (optional):

Are you sure you would like to continue?

Select Yes to continue or No to go back and make changes.

33. The **Advising Notes** page displays.
34. ***OPTIONAL*** An existing Advising Note can be updated by selecting the **Update Note** button.

← Advising Notes Advising Notes

Jacqueline Kennedy
201461610

Advising Notes

▼ Advising Note

Institution: Clark College	Created On: 06/26/2019
Category: Advising Services	Created By: Joyce Merrill
Subcategory: Academic Standards Appt.	Status: Open
Assigned To: Joyce Merrill	Advisee Access: Yes

35. The **Update Note Information** section displays for updating.
36. Make any needed changes and submit to save.
37. The process to enter advising notes from the Advisor Center is now complete.
38. Process complete.