Creating and Managing Advising Notes

Creating and Managing Advising Notes

Bundle 36. New chapter.

The Advising Notes feature enables advisors and other users to record notes about their interactions with students. This section discusses the administration of advising notes.

The Advising Notes (administration) page is intended for an administrative super user with unrestricted access to all advising notes in the system. Besides creating and updating notes, an administrator can edit note text, reassign notes and reopen closed notes.

Page Used to Manage Advising Notes

Page Name	*Definition Name*	*Navigation*	*Usage*
Advising Notes	SAA_ADV_NOTE	Curriculum Management, Instructor/Advisor Information, Advising Notes or Academic Advisement, Student Advisement, Advising Notes	Create, update and close advising notes created by any advisor for any advisee.

Managing Advising Notes

Use the Advising Notes (administration) page to manage Advising Notes in the system.

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Navigation

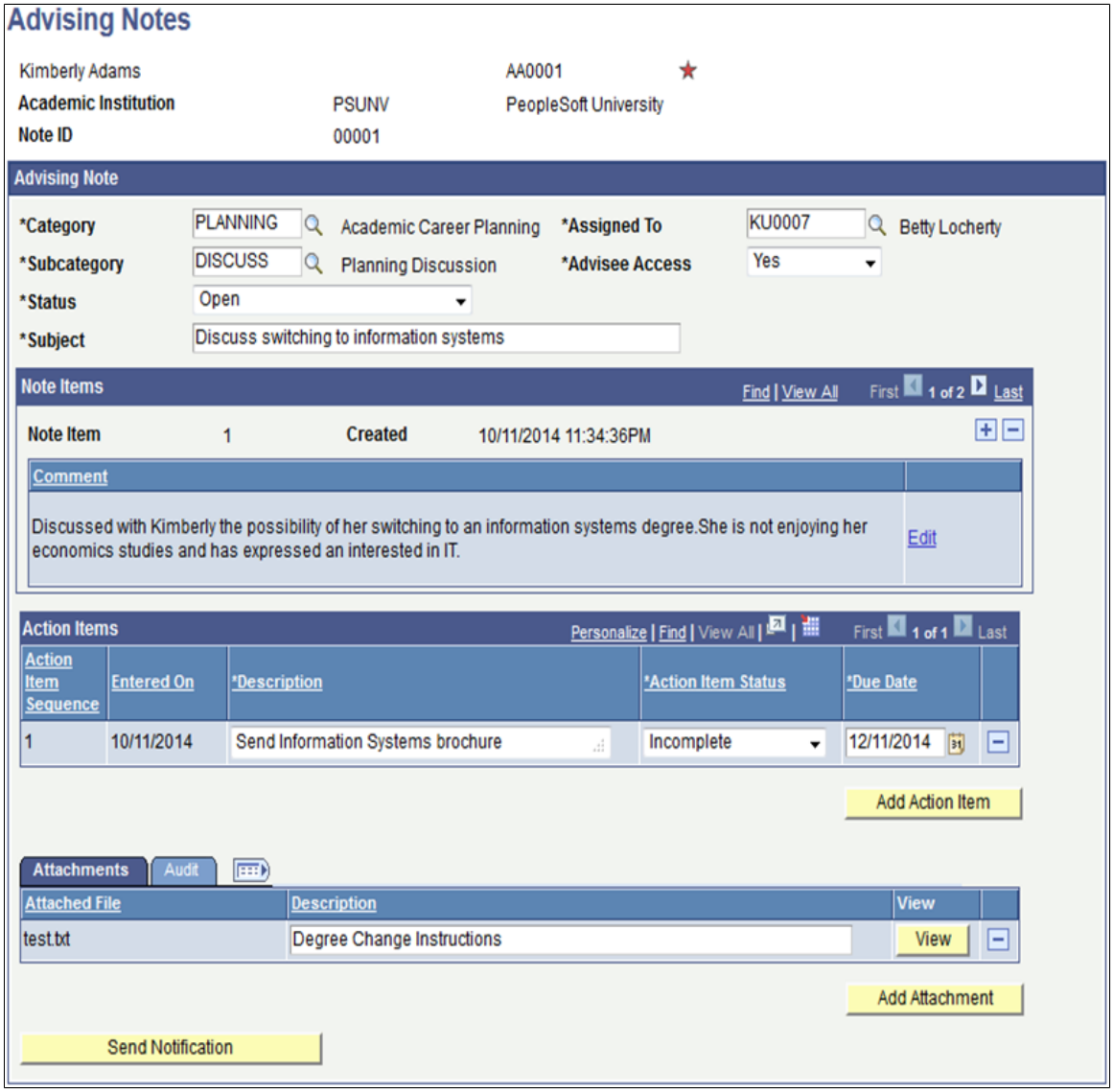
Access the Advising Notes page either from Curriculum Management, Instructor/Advisor Information, Advising Notes

or

Academic Advisement, Student Advisement, Advising Notes.

Image: Advising Notes (administration) page

Advising Notes (administration) page



Category

Select a note category. You can define category values in the Note Category table.

See "Defining Note Categories *(PeopleSoft Campus Solutions 9.0: Self Service)*" for more information.

Subcategory

Select a note subcategory. You can define subcategory values in the Note Subcategory table.

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	See "Defining Note Subcategories *(PeopleSoft Campus Solutions 9.0: Self Service)*" for more information.
Status	Select either Open or Closed. Only an administrator can reset note status from Closed to Open.
Assigned To	Assign the note to an advisor.
Advisee Access	Select Yes to allow advisee access to the note. The default value is No. See "Defining Academic Advisement Setup *(PeopleSoft Campus Solutions 9.0: Self Service)*" for information on advisee access to advising notes.
Subject	Enter a subject line for the note.
Note Items	Create, browse, edit and remove comments for the advising note.
Action Items	Add, browse and remove action items for the advising note. The Entered on date is automatically recorded. You can set a Due Date for an item and Action Item Status to either complete or incomplete. See "Defining Academic Advisement Setup *(PeopleSoft Campus Solutions 9.0: Self Service)*" for information on setting up the Action Items region.
Attachments	Add, view and remove files as attachments to the advising note.
Send Notification	Click this button to notify the advisee by email. A Notify Advisee dialog box opens with details of the note and a link to the note page. Optionally, you can add a message for the advisee. See "Defining Academic Advisement Setup *(PeopleSoft Campus Solutions 9.0: Self Service)*"on setting up and customizing notifications for advisees.

Related Links

"Viewing Advisee Information Through Self-Service Pages (PeopleSoft Campus Solutions 9.0: Self Service)"

"Setting Up Self-Service Features for Academic Advisement (PeopleSoft Campus Solutions 9.0: Self Service)"

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