Notes

Campus | Student Success Collaborative℠

Last Revised: 4/19/2016

FINAL

REVISION CONTROL

Document Title:	Notes

Date	By	Action	Pages
4/19/2016	M Markin	Notes	All

Review/Approval History

Date	By	Action	Pages
			All
			All
			All

Confidentiality Statement

This document has been checked and screen shots do not contain any confidential information (staff names, addresses, social security numbers).

Please add a new line, verifying that screen shots have been checked each time this document is published.

Publishing Date Name of Individual Checking Screen Shots

Table of Contents   Page

Introduction

The purpose of this process guide is to understand the Note functionality and when using a note is appropriate.

Notes can be used to attach commentary as a supplement to the Advising Report. Notes can also function to include general information that did not occur in the advising appointment or sensitive information that may not be appropriate in the Advising Report.

Notes can be set with different privacy settings if the advisor does not want the note to be public. Notes can be set to only be viewed by the advisor creating the note or include the student to also have access to view the note.
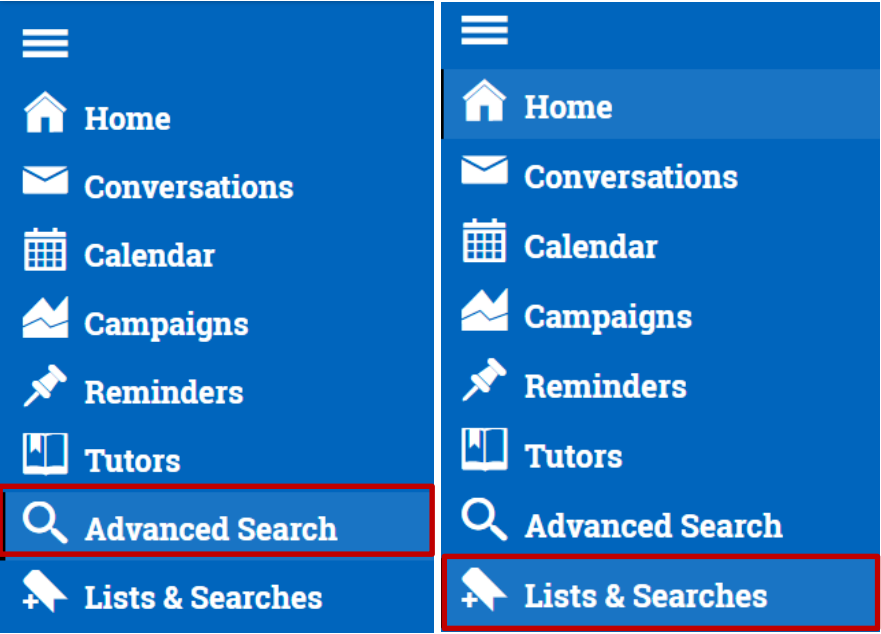
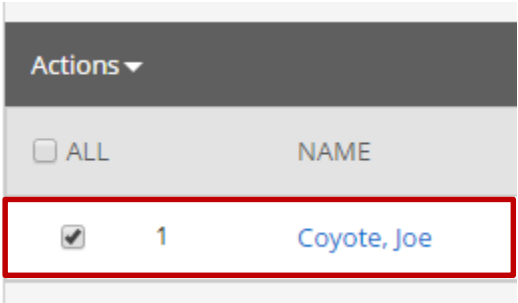Notes can be accessed from a student's profile page:

1.0 Notes

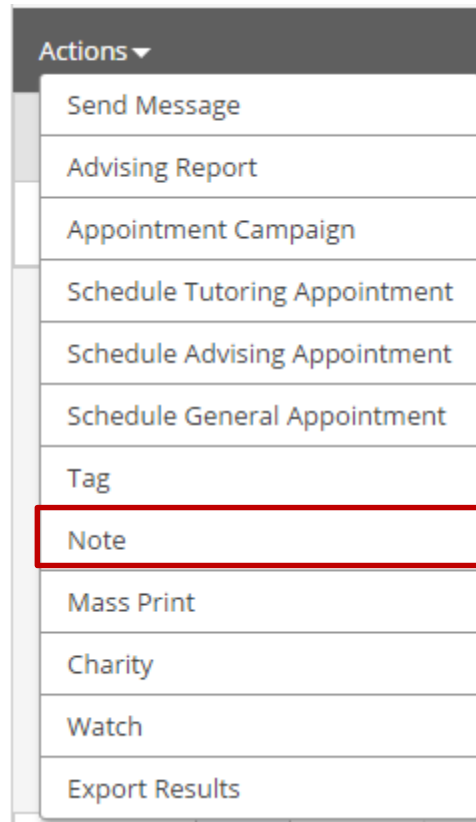From the student's profile page, select **Add Note on this Student**:
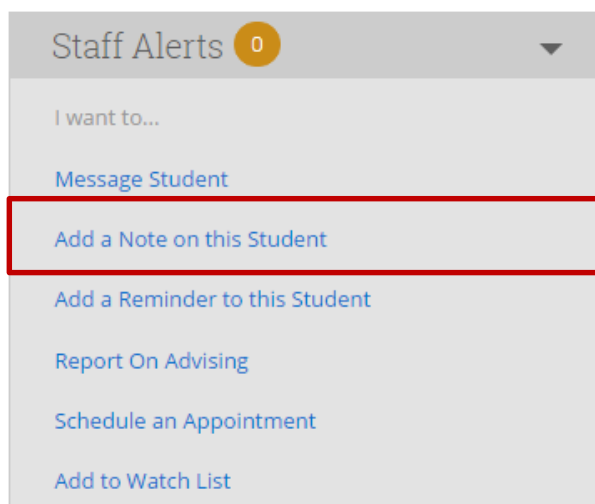
 Or the search functionality including:

Select the box next to the student**:**

Select the **Actions** dropdown and select **Note:**

Add the note. There is not a limit regarding how long the note can be.

Note Reason

Note URL

Visibility

☐ Clark Kent

☐ Joe Coyote ?

☐ Printed Student Report

If box is checked, the student can also view the note.

If box is checked, only the author of the note can view. If box is unchecked, any user with the note permission can view the note.

If box is checked, the note will appear in the Student Development Report.

Task Tracking

Due Date (optional)

☐ Is Complete?

☐ Show on My Task List

Files can be attached to the note if necessary.

⬒ Attach File | Choose File | No file chosen

Save Note   Cancel

When finished, select **Save Note** .