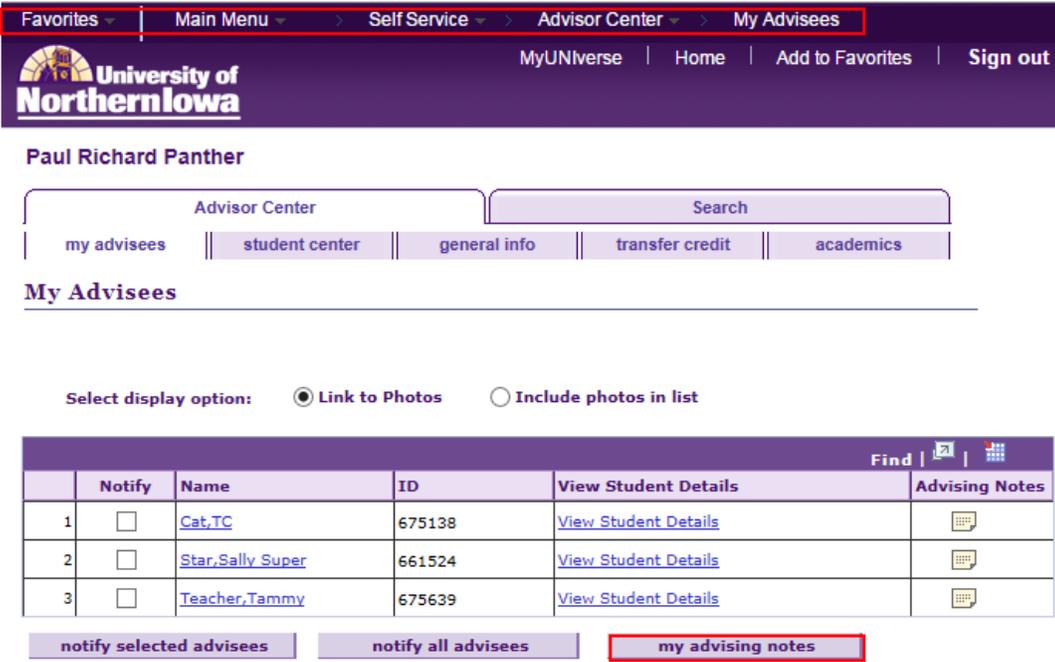
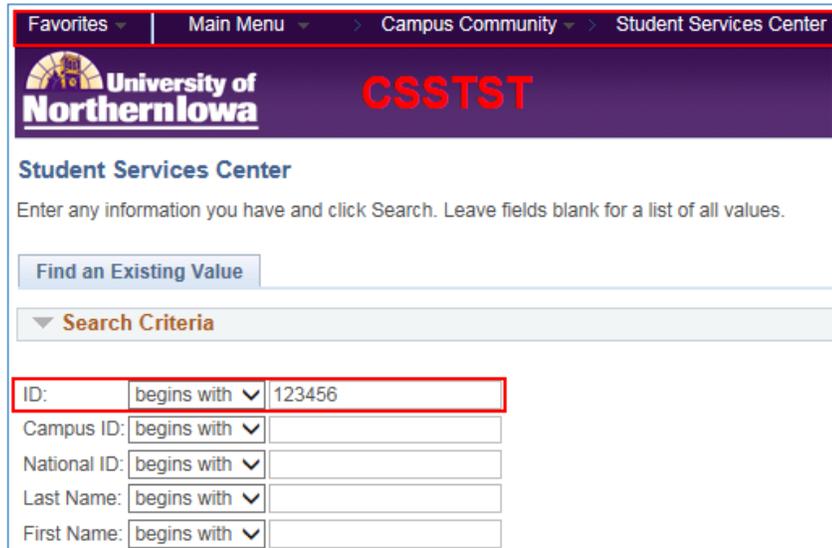


Using My Advising Notes

Purpose: Users with approved security to add advising notes can filter, sort and search their entries via My Advising Notes. The following instructions describe how to use My Advising Notes.

Step	Action																								
1a.	<p>To access <i>My Advising Notes</i> from Advisor Center, go to My Advisees. Use the <i>my advising notes</i> link below your list of advisees.</p>  <p>The screenshot shows the following elements:</p> <ul style="list-style-type: none"> Navigation: Favorites, Main Menu, Self Service, Advisor Center, My Advisees User: Paul Richard Panther Advisor Center tabs: my advisees, student center, general info, transfer credit, academics Search bar Display options: <input checked="" type="radio"/> Link to Photos, <input type="radio"/> Include photos in list Table with columns: Notify, Name, ID, View Student Details, Advising Notes Buttons: notify selected advisees, notify all advisees, my advising notes <table border="1" data-bbox="305 1075 1339 1255"> <thead> <tr> <th></th> <th>Notify</th> <th>Name</th> <th>ID</th> <th>View Student Details</th> <th>Advising Notes</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="checkbox"/></td> <td>Cat,TC</td> <td>675138</td> <td>View Student Details</td> <td></td> </tr> <tr> <td>2</td> <td><input type="checkbox"/></td> <td>Star,Sally Super</td> <td>661524</td> <td>View Student Details</td> <td></td> </tr> <tr> <td>3</td> <td><input type="checkbox"/></td> <td>Teacher,Tammy</td> <td>675639</td> <td>View Student Details</td> <td></td> </tr> </tbody> </table>		Notify	Name	ID	View Student Details	Advising Notes	1	<input type="checkbox"/>	Cat,TC	675138	View Student Details		2	<input type="checkbox"/>	Star,Sally Super	661524	View Student Details		3	<input type="checkbox"/>	Teacher,Tammy	675639	View Student Details	
	Notify	Name	ID	View Student Details	Advising Notes																				
1	<input type="checkbox"/>	Cat,TC	675138	View Student Details																					
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3	<input type="checkbox"/>	Teacher,Tammy	675639	View Student Details																					

- 1b. To access *My Advising Notes* from **Student Services Center**, go to Student Services Center. Enter Search Criteria.



[Favorites](#) | [Main Menu](#) | [Campus Community](#) | [Student Services Center](#)


University of Northern Iowa
CSSTST

Student Services Center

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

ID:

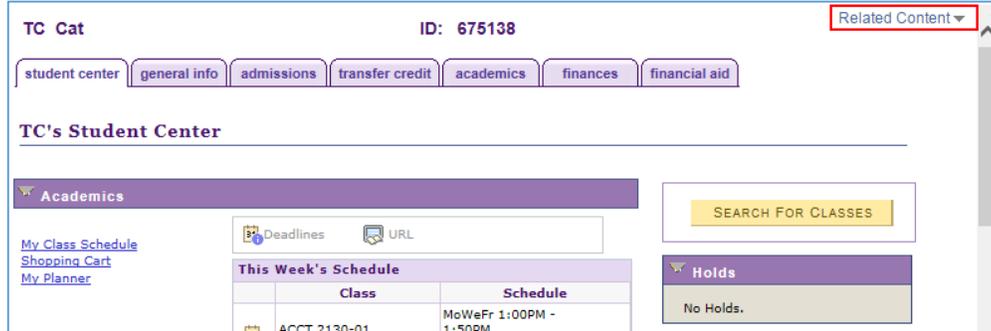
Campus ID:

National ID:

Last Name:

First Name:

Result: the student's *Student Center* tab will appear, with a *Related Content* link in the top right corner of the page.



TC Cat ID: 675138 [Related Content](#)

[student center](#) | [general info](#) | [admissions](#) | [transfer credit](#) | [academics](#) | [finances](#) | [financial aid](#)

TC's Student Center

Academics
[SEARCH FOR CLASSES](#)

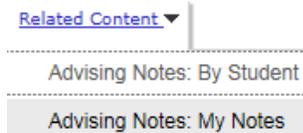
[My Class Schedule](#) | [Deadlines](#) | [URL](#)

[Shopping Cart](#) | **This Week's Schedule**

Class	Schedule
ACCT 2130-01	MoWeFr 1:00PM - 1:50PM

Holds
No Holds.

Next, click on *Related Content* and *Advising Notes: My Notes*.



[Related Content](#) ▼

.....
[Advising Notes: By Student](#)

.....
Advising Notes: My Notes

Result: the *Related Content* options open. Make sure to activate the *Advising Notes: My Notes* tab.



▼ [Related Content](#) | [Advising Notes: By Student](#) | Advising Notes: My Notes

2. *My Advising Notes* displays advising notes assigned to you or created/last updated by you.

Advising Note	Name	Institution	Subject	Category	Subcategory	Assigned To	Created By	Note Status	Action Items	Last Updated
	Derek Doesitall	University of Northern Iowa	Internship			Paul Richard Panther		Open	None	09/28/2015
	TC Cat	University of Northern Iowa	Student Request: Substitute for LAC 3B	Undergraduate	General Advising Note	Paul Richard Panther	Paul Richard Panther	Open	Overdue	09/28/2015
	TC Cat	University of Northern Iowa	152BA	Undergraduate	General Advising Note	Michele K Peck	Paul Richard Panther	Open	None	09/28/2015
	Tammy Teacher	University of Northern Iowa	LAC Midterm Grade	Office: Academic Advising	Academic Planning / Success	Paul Richard Panther	Paul Richard Panther	Open	Pending	09/28/2015
	Tammy Teacher	University of Northern Iowa	Career Cruising Workshop 9/23/15	Office: Academic Advising	Event	Paul Richard Panther	Paul Richard Panther	Open	None	09/28/2015

3. To access a note, use the *Advising Note* icon next to the note



Result: The selected note opens for viewing:

Advising Notes

Tammy Teacher

Advising Note

Institution	University of Northern Iowa	Created On	09/28/2015
Category	Office: Academic Advising	Created By	Paul Richard Panther
Subcategory	Event	Note Status	Open
Assigned To	Paul Richard Panther	Advisee Access	No
Subject	Career Cruising Workshop 9/23/15		

[update note](#)

Note Items			
Note Item	Entered On	Entered By	Comment
1	09/28/2015	Paul Richard Panther	Participated in CC workshop. Clusters: Arts and Social Services Clusters.

4. To search these notes you can narrow the list by using *Filter Notes*

Filter Notes

Institution	<input type="text"/>	Created By	<input type="text"/>
Category	<input type="text"/>	Created	<input type="text"/>
Subcategory	<input type="text"/>	Last Updated	7 Days
Note Status	Open	Action Items	<input type="text"/>

Use one or more of the **Filter Notes** options:

- Institution:** UNICS (required before Category filters)
- Category:** Select option from drop-down menu. (required before Subcategory filters)
- Subcategory:** Select option from drop-down menu.
- Note Status:** Open or Closed. Defaults to **Open**.
- Created By:** Enter the user id.
- Created:** Select from a range of days of when the note was initially created.
- Last Updated:** Select from a range of days of when the note was last updated.
- Action Items:** Select from None, Overdue and Pending options.,

Filter Notes

Institution	University of Northern Iowa	Created By	373146
Category	Undergraduate	Created	90 Days
Subcategory	General Advising Note	Last Updated	30 Days
Note Status	Open	Action Items	Overdue

5. To activate the filters, use the *APPLY FILTER* button.

Results: The advising notes that fit the filter criteria selected display.

Filter Notes										
Advising Note	Name	Institution	Subject	Category	Subcategory	Assigned To	Created By	Note Status	Action Items	Last Updated
	TC Cat	University of Northern Iowa	Student Request: Substitute for LAC 3B	Undergraduate	General Advising Note	Paul Richard Panther	Paul Richard Panther	Open	Overdue	09/28/2015
	TC Cat	University of Northern Iowa	152BA	Undergraduate	General Advising Note	Michele K Peck	Paul Richard Panther	Open	None	09/28/2015

6. **Sorting the advising notes list** to display the list in a different order. *Click* on any of the headings to sort in alpha/numeric order.

For example, if you sort on Subject,

Advising Note	Name	Institution	Subject	Category
---------------	------	-------------	---------	----------

then the list of notes will appear in alpha/numeric order by subject.

Advising Note	Name	Institution	Subject	Category
	TC Cat	University of Northern Iowa	152BA	Undergraduate
	Tammy Teacher	University of Northern Iowa	Career Cruising Workshop 9/23/15	Office: Academic Advising
	Derek Doesitall	University of Northern Iowa	Internship	
	Tammy Teacher	University of Northern Iowa	LAC Midterm Grade	Office: Academic Advising
	TC Cat	University of Northern Iowa	Student Request: Substitute for LAC 3B	Undergraduate

If you sort again by Subject, then the list of notes will appear in reverse alpha/numeric order:

Advising Note	Name	Institution	Subject	Category
	TC Cat	University of Northern Iowa	Student Request: Substitute for LAC 3B	Undergraduate
	Tammy Teacher	University of Northern Iowa	LAC Midterm Grade	Office: Academic Advising
	Derek Doesitall	University of Northern Iowa	Internship	
	Tammy Teacher	University of Northern Iowa	Career Cruising Workshop 9/23/15	Office: Academic Advising
	TC Cat	University of Northern Iowa	152BA	Undergraduate

Note: users may wish to standardize some common subjects used and save to a spreadsheet kept on their desktop. By using the same phrase and spacing, common subjects will auto sort together.