

# University of Akron Advising Summary – March Functionality

Below is a brief graphical representation of how an advisor can quickly and easily create an Advising Summary Report for an advising session as well as creating a Note in GradesFirst.

## Creating an Advising Summary Report for an advising session

The screenshot shows the 'Advising Home' page with a navigation bar (Home, Calendar, Conversations) and tabs for 'My Assigned Students', 'Upcoming Appointments', 'My Availability', and 'Advising Center'. Below the tabs is a 'Filter By Tags' section with a red box and arrow labeled '2' pointing to it. Underneath are buttons for 'Send Message', 'Schedule Appointment', 'Advising Report' (highlighted with a red box), and 'Note'. A table lists assigned students with a red box and arrow labeled '1' pointing to the first row.

ALL	STUDENT NAME	CATEGORY
<input checked="" type="checkbox"/>	1 Banulus, Val	Men's Basketball
<input type="checkbox"/>	2 Bigs, Shannon	Women's Soccer
<input type="checkbox"/>	3 Celex, Brian	Baseball

**Step 1: Select a student to create an Advising Summary Report.** In order to create an Advising Summary Report for an advising session that was not scheduled through GradesFirst, select the student by checking the box next to their name.

**Step 2: Open the Advising Summary Report.** In order to open an Advising Summary Report for the selected student, click the 'Advising Report' button above the assigned student list.

The 'Create an Advising Report' form is divided into sections: 'Appointment Details', 'Attendee', and 'Appointment Summary And Reminders'. Step 3 points to the 'Location' dropdown menu. Step 4 points to the 'Summary' text area. Step 5 points to the 'Suggested time' and 'Suggested date' fields. Step 6 points to the 'Save this Report' button.

**Step 3: Choose a location.** In order to submit the Advising Summary Report, a location must be chosen.

**Step 4: Add summary notes.** Use this section to add summary notes for the advising session.

**Step 5: Add reminder information.** Use this section to add reminder information to the Advising Summary Report. **This does not schedule any future appointment.**

**Step 6: Save the Advising Summary Report.** Once the Advising Summary Report has been filled out, click the 'Save this Report' button to save the report information.

**Submitted Advising Summary Reports will populate in the Recent Advising Appointments section.**

The 'Advisor Reporting' section includes buttons for 'Recent Advisor Appointments' and 'Recent Reports You Created'. Below is a table titled 'RECENT ADVISING APPOINTMENTS' with columns for DATE, REASON, and COMMENT.

DATE	REASON	COMMENT
03/02/2014	Interview Coaching	

## Add a Note to a student profile

The screenshot shows the 'Advising Home' interface. At the top, there are tabs for 'My Assigned Students', 'Upcoming Appointments', and 'My Availability'. Below these is a 'Filter By Tags' section. A row of buttons includes 'Send Message', 'Schedule Appointment', 'Advising Report', and 'Note'. A red box labeled '1' highlights the 'Note' button. Below the buttons is a table with columns 'ALL' and 'STUDENT NAME'. The first row shows a checked checkbox, the number '1', and the name 'Banulus, Val'. A red box labeled '2' highlights the 'Filter By Tags' area.

**Step 1: Select the student to add a Note.** In order to add a Note to a student profile, first select the student by checking to box next to their name.

**Step 2: Open the Note prompt.** In order to open a Note prompt, click the 'Note' button above the assigned student list.

The 'Add a Note' dialog box is shown. It has a 'Note (Required)' field with a red box labeled '3' and the text 'Add note here!'. Below it is a 'Note Reason' dropdown menu with 'Transcript' selected, highlighted by a red box labeled '4'. Under 'Attachments', there is an 'Attach File' button and a 'Choose File' button, with a red box labeled '5' around the 'Choose File' button. The 'Permissions & Settings' section has two checkboxes: 'Viewable by student' (checked) and 'Show on Printed Student Report' (unchecked), with a red box labeled '6' around the 'Show on Printed Student Report' checkbox. At the bottom, there are 'Save Note' and 'Cancel' buttons, with a red box labeled '7' around the 'Save Note' button.

**Step 3: Create the Note.** This section can be used to add additional information to the Note.

**Step 4: Choose a Note Reason.** It is required to choose a Note Reason before saving the Note. Multiple Note Reasons can be chosen.

**Step 5: Attach a document to the Note.** Use the 'Choose File' button to add an attachment to the Note.

**Step 6: Add permissions to the Note.** It is optional to allow the student to view the Note as well as have the Note appear on the Student Development Report.

**Step 7: Save the Note.** Once all Note information has been inputted, click the 'Save Note' button to create the Note.

**Viewing Notes.** Notes can be viewed from the student profile "Reports / Notes" section or the "Notes" report in the 'Reports' tab.

The screenshot shows the 'NOTES ABOUT STUDENT' section. It has a table with columns: ALL, DATE, CREATED BY, NOTE, NOTE REASONS, COMPLETE?, ATTACHMENTS. The first row shows a checked checkbox, the date '03/02/2014', the name 'Rebekah Swanson', the text 'Add note here!', the reason 'Transcript', and a dash in the 'COMPLETE?' column.

"Reports / Notes" section of the student profile

The screenshot shows the 'Notes on Students' report. It has a search bar with 'Show / Hide Advanced Search' and a 'Search' button. Below the search bar are fields for 'Keywords', 'Begin Date' (03/02/2014), and 'End Date' (03/08/2014). There is also a 'Search Note Text' field and a 'Note Reasons' dropdown menu. At the bottom, there are checkboxes for 'My Students Only', 'At-Risk Students Only', and 'Include Inactive'.

"Notes" report