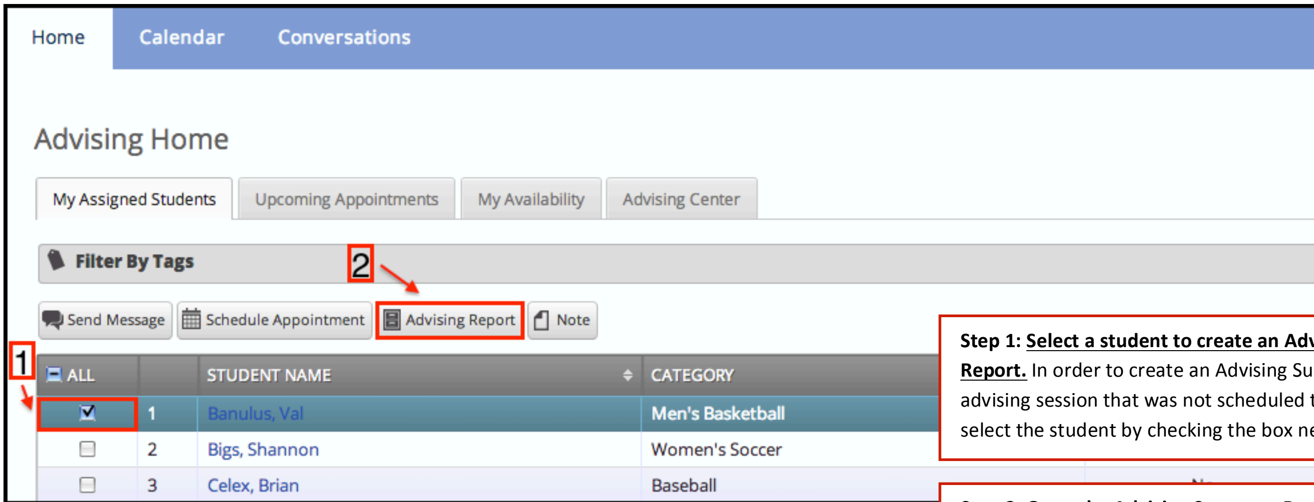
University of Akron Advising Summary – March Functionality

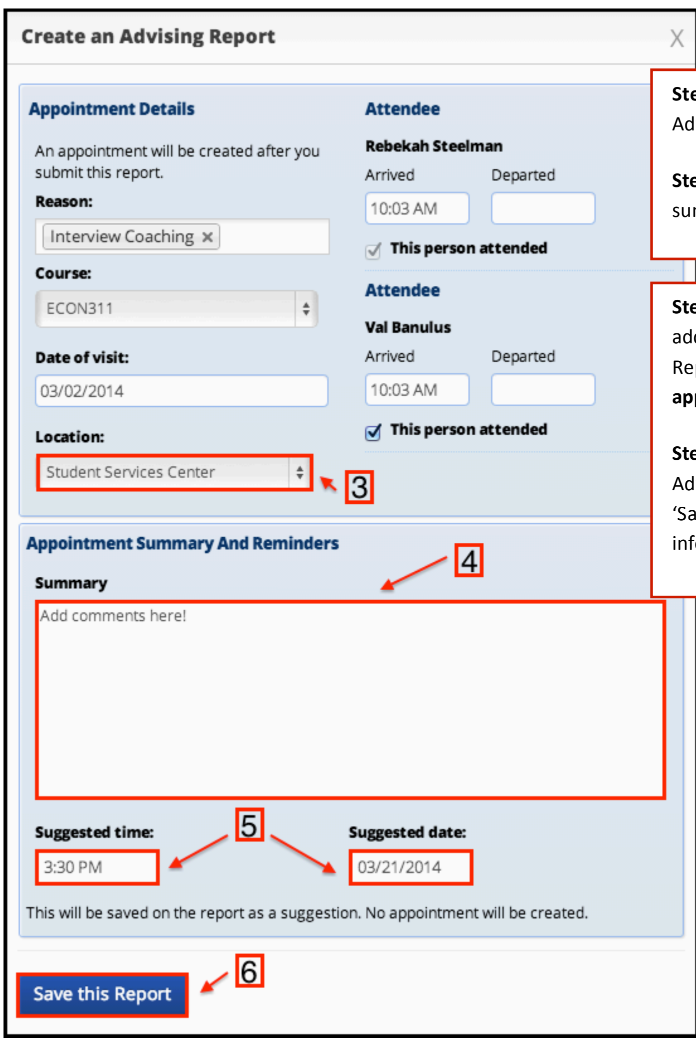
Below is a brief graphical representation of how an advisor can quickly and easily create an Advising Summary Report for an advising session as well as creating a Note in GradesFirst.

<u>Creating an Advising Summary Report for an advising session</u>



Step 1: <u>Select a student to create an Advising Summary Report.</u> 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: <u>Open the Advising Summary Report.</u> In order to open an Advising Summary Report for the selected student, click the 'Advising Report' button above the assigned student list.



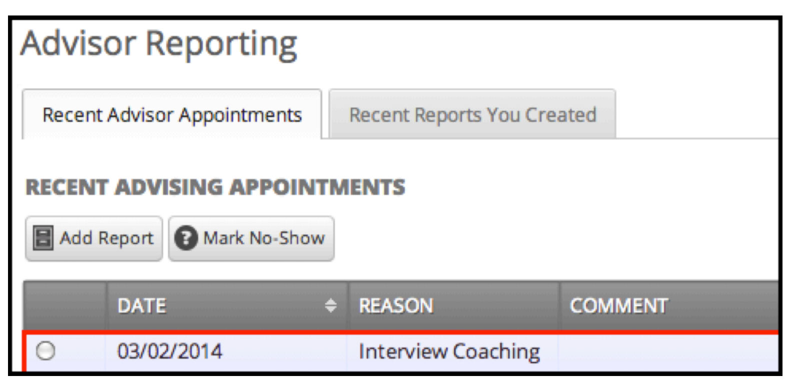
Step 3: <u>Choose a location.</u> In order to submit the Advising Summary Report, a location must be chosen.

Step 4: <u>Add summary notes.</u> Use this section to add summary notes for the advising session.

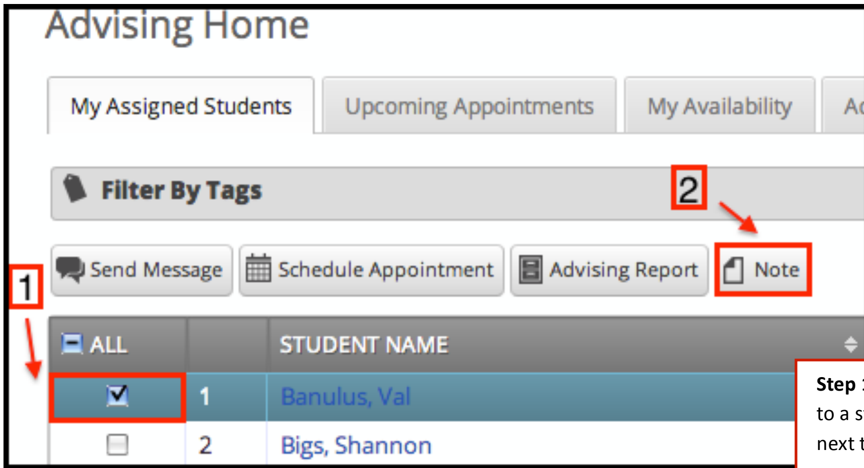
Step 5: <u>Add reminder information.</u> Use this section to add reminder information to the Advising Summary Report. **This does not schedule any future appointment.**

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

<u>Submitted Advising Summary Reports will populate in the Recent Advising Appointments section.</u>

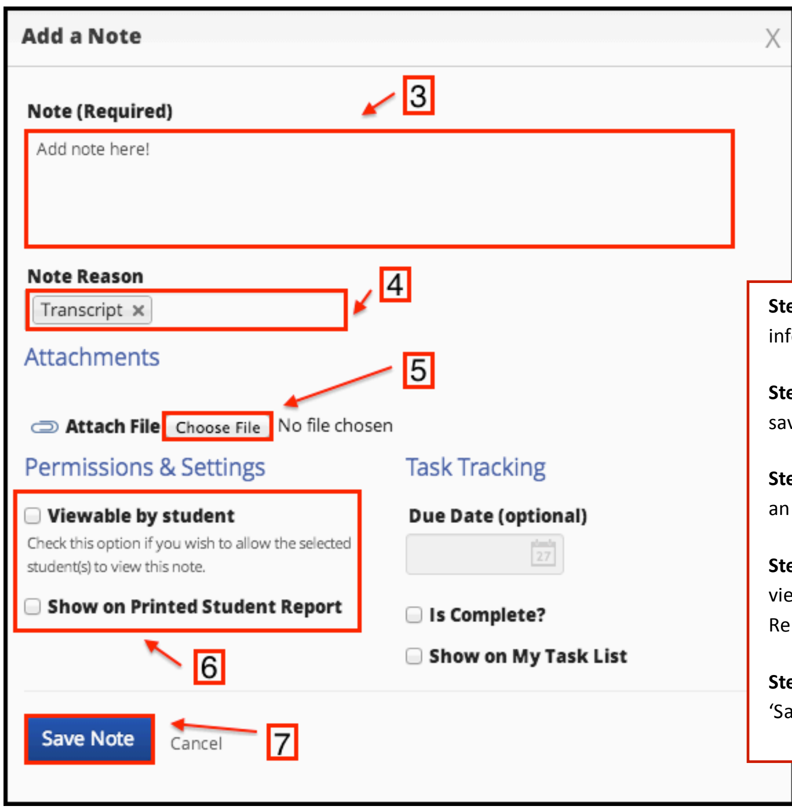


Add a Note to a student profile



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.



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

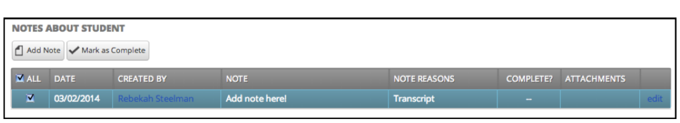
Step 4: Choose a Note Reason. It is required to choose a Note Reason before saving the Note. Multiple Note Reasons can be chosen.

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

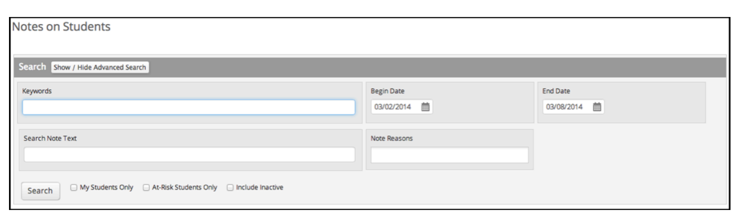
Step 6: Add permissions to the Note. It is optional to allow the student to view the Note as well as have the Note appear on the Student Development Report.

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.



"Reports / Notes" section of the student profile



"Notes" report