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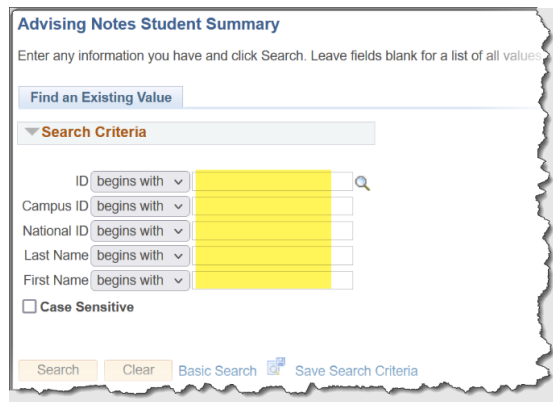
Advising Notes allow advisors and staff to leave detailed notes about interactions with students.

## How to Add an Advising Note

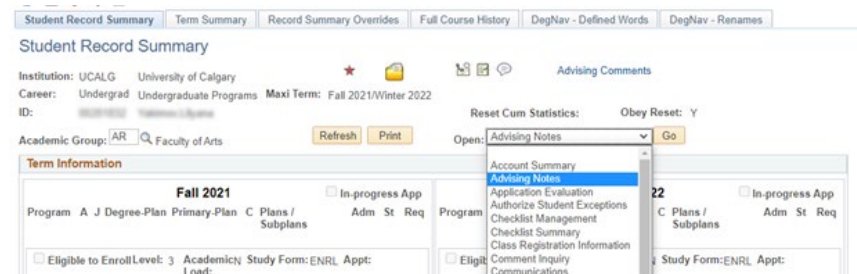
1. Location #1 Go to **Main Menu > Academic Advisement > UC Advisor Notes Summary**

View data for other students

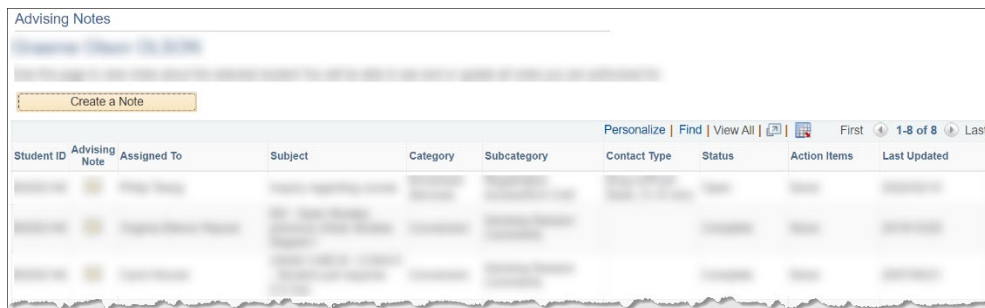
Find the student by entering the appropriate search criteria.



- Location #2 Go to **Main Menu > Academic Advisement > Academic Advising Summary**



- The list of previously entered advising notes are displayed. If the student does not have any existing notes, the list will be empty.



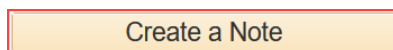
Advising Notes

Create a Note

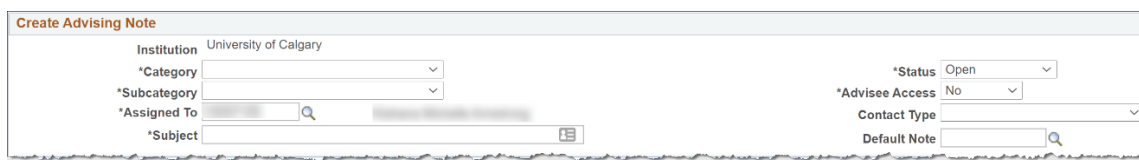
Student ID	Advising Note	Assigned To	Subject	Category	Subcategory	Contact Type	Status	Action Items	Last Updated

Note: The category is the area/department you are advising for. The subcategory is the advising subject area.

- Click “Create a Note”.



- Fill in the relevant details.



Create Advising Note

Institution University of Calgary

\*Category

\*Subcategory

\*Assigned To

\*Subject

\*Status Open

\*Advisee Access No

Contact Type

Default Note

**Category/Sub-category:** Choose from a list of categories/sub-categories you have access to. The category is the area/department you are advising for. The subcategory is the advising subject area.

**Assigned To:** Default is your ID. If you must assign it directly to a person, click the magnifying glass and choose their ID.

**Subject:** Enter the title or reason for creating this note.

**Status:** Defaults to “Complete”. Choose “Open” status if you want the student to be able to respond to the advising note,

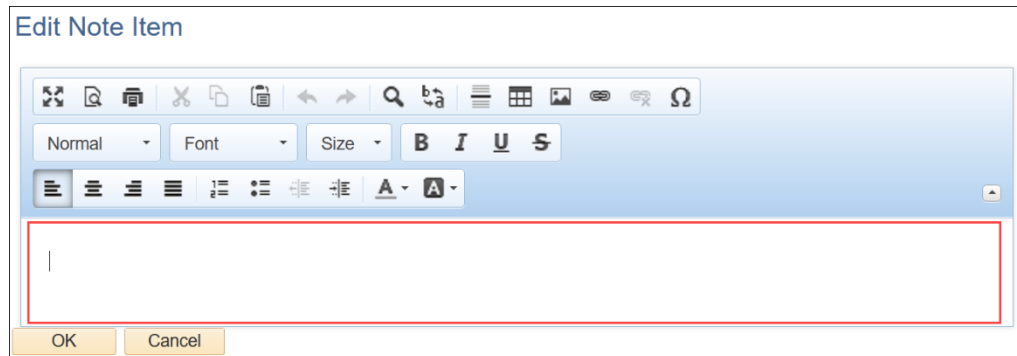
**Advisee Access:** Default “No”. Choose “Yes” if you desire the student to see the note in their student centre.

*Note: For the note Status must be Open and the Advisee Access must be Yes for a student to be able to respond to the note.*

**Contact Type:** Choose the appropriate type of student interaction and duration. The category selected will feed aggregate stats to better plan resources for your department. (optional)

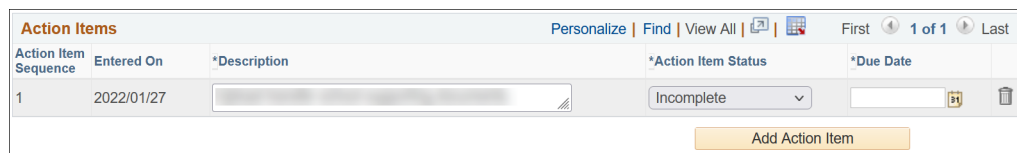
**Default Note:** If your department has special note templates applicable to your advising interaction select the default note number here. If not, leave blank.

- Enter a text description of the student interaction and hit the 'OK' button.



Note: see ['How to enter a link in a note below'](#) for information on how to include a link

- If you wish to keep track of a task/item that you need to follow up on click 'Add Action Item' and enter the required action, preferably with a due date. Mark the 'Action Item Status' as 'Incomplete'. Note: Action items are not viewable by the student, even if Advisee Status is set to Yes



Action Item Sequence	Entered On	Description	Action Item Status	Due Date
1	2022/01/27		Incomplete	

- If you have any attachments (i.e., from student email correspondence), you would like to attach to this note, click 'Add Attachment'.



Attached File	Description

Note: Attachments are viewable by the student when the Advisee Status is set to "Yes"

- Hit "Submit" to save all changes.  
End.

## How to View Advising Notes

### View advising notes assigned to you

1. Go to Main Menu > Academic Advisement > UC Advisor Notes Summary. Fill in the appropriate filter criteria and click 'Apply Filter'.


Advising Notes

This page displays advising notes assigned to you. Use the filters, as needed, to narrow your search results. Also use the column headings to in the grid to sort in ascending or descending order. Click the ID to access the detail about a particular note or to add an additional comment to a note.

**Filter Notes**

Institution	University of Calgary	Created By	<input type="text"/>
Category		Created	
Subcategory		Last Updated	7 Days
Status	Open	Action Items	
Contact Type			

As an example, the default is to list of 'Open' advising notes assigned to you within the last 7 days are displayed.

Student Details								
Advising Note	Student ID	Name	Subject	Category	Subcategory	Contact Type	Assigned To	Created By
			Question about ACCT 217	Enrolment Services	Grading / GPA	Email Inquiry (5-15 min)		

Note: the Queries listed below will provide a more robust search / reporting tool.

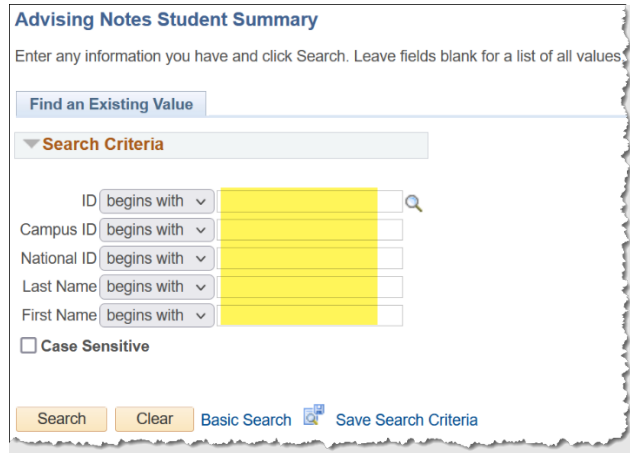
End.

## View advising notes for a particular student

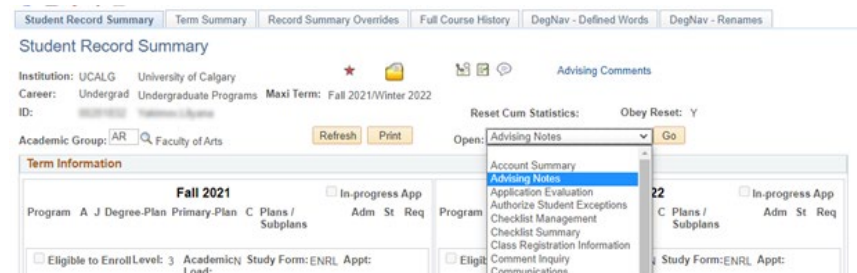
1. Location #1 Go to **Main Menu > Academic Advisement > UC Advisor Notes Summary**

View data for other students












Enter the search criteria (typically EMPLID) of the student you wish to find advising notes on and hit “Search”.



2. Location #2 Go to **Main Menu > Academic Advisement > Academic Advising Summary**



2. A list of all advising notes are displayed.

Student ID	Advising Note	Assigned To	Subject	Category	Subcategory	Contact Type	Status	Action Items	Last Updated
			Question about ACCT 217	Enrolment Services	Grading / GPA	Email Inquiry ( 5-15 min)	Open	None	2022/01/25
			Final exam dates inquiry	Faculty of Science	Exams	In-Person Mtg ( 1-5 min)	Complete	None	2022/01/20
			Grades Inquiry	Enrolment Services	Grading / GPA	Phone Call ( 5-15 min)	Complete	Pending	2022/01/20
			Registration – request document from student	Enrolment Services	Registration Support	Phone Call (15-30 min)	Open	Pending	2022/01/20
			ED - Open Studies, previous Urban Studies Degree f	Conversion	Advising Session Comments		Complete	None	2019/10/25
			GRAD CHECK / CONVO - Student just requires 0.5 mor	Conversion	Advising Session Comments		Complete	None	2007/06/21
			UBST 313: Student says UBST 313 is listed on DN un	Conversion	Advising Session Comments		Complete	None	2007/01/29
			GRAD CHECK: Has 13.5/8.0 pr end of W06 - needs 3.0	Conversion	Advising Session Comments		Complete	None	2006/05/24
			UBST: Too many yrs. Was concerned about number of	Conversion	Advising Session Comments		Complete	None	2004/06/03
			ADM TO UBST: Needs adm to UBST to allow regn in CE	Conversion	Advising Session Comments		Complete	None	2004/06/03
			URBAN STUDIES: WE DISCUSSED THE UBST PROG - THE MA	Conversion	Advising Session Comments		Complete	None	2004/03/26

Note: The category is the area/department (e.g., Enrolment Services, Graduate Studies, Undergraduate) you are advising for. The subcategory is the advising subject area.

Click the yellow advising note icon () for more details on any particular note.

Advising Notes

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**Advising Note**

Institution	Created On
Category	Created By
Subcategory	Status
Assigned To	Advisee Access
Subject	Contact Type

Update Note
Notify Advisee

**Note Items**

Note Item	Entered On	Entered By	Comment
1			
2			

Attachments

Attached File	Description

End.

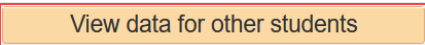
## How to Update/Edit Advising Notes

If you wish to add an update to an existing note, find the note and then add update as required. You can update the note status / information, add an additional note item, action item, and or attachments.

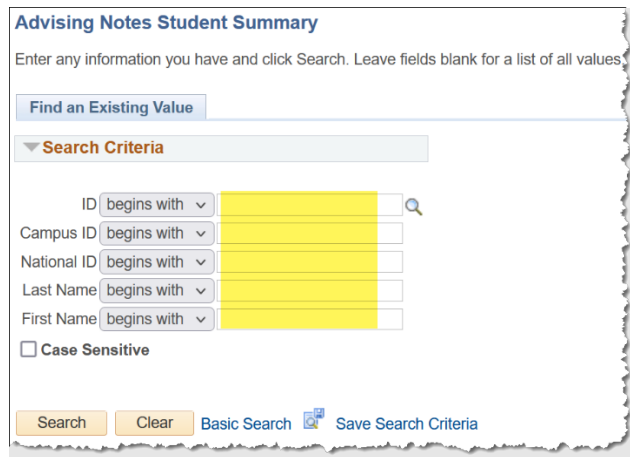
### Method 1 – Update using Advisor Notes Summary

*Note: You cannot update a closed note or edit a previously entered advising note text using this method. If this is required, use [Method #2](#).*

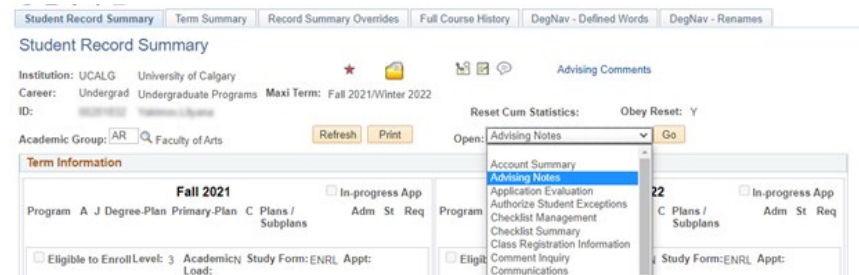
1. Location #1 Go to **Main Menu > Academic Advisement > UC Advisor Notes Summary**














Enter the search criteria (typically EMPLID) of the student you wish to find advising notes on and hit “Search”.




- Location #2 Go to **Main Menu > Academic Advisement > Academic Advising Summary**



- A list of all advising notes are displayed.

Student ID	Advising Note	Assigned To	Subject	Category	Subcategory	Contact Type	Status	Action Items	Last Updated
			Question about ACCT 217	Enrolment Services	Grading / GPA	Email Inquiry ( 5-15 min)	Open	None	2022/01/25
			Final exam dates inquiry	Faculty of Science	Exams	Ins-Person Mtg ( 1- 5 min)	Complete	None	2022/01/20
			Grades Inquiry	Enrolment Services	Grading / GPA	Phone Call ( 5-15 min)	Complete	Pending	2022/01/20
			Registration – request document from student	Enrolment Services	Registration Support	Phone Call (15-30 min)	Open	Pending	2022/01/20
			ED - Open Studies, previous Urban Studies Degree 1	Conversion	Advising Session Comments		Complete	None	2019/10/25
			GRAD CHECK / CONVO - Student just requires 0.5 mor	Conversion	Advising Session Comments		Complete	None	2007/06/21
			UBST 313: Student says UBST 313 is listed on DN	Conversion	Advising Session Comments		Complete	None	2007/01/29
			GRAD CHECK: Has 13.58.0.9 end of W06 - needs 3.0	Conversion	Advising Session Comments		Complete	None	2006/05/24
			UBST: Too many yrs. Was concerned about number of	Conversion	Advising Session Comments		Complete	None	2004/06/03
			ADM TO UBST: Needs adm to UBST to allow regn in GE	Conversion	Advising Session Comments		Complete	None	2004/06/03
			URBAN STUDIES: WE DISCUSSED THE UBST PROG - THE MA	Conversion	Advising Session Comments		Complete	None	2004/03/26



Note: The category is the area/department you are advising for. The subcategory is the advising subject area.

- Click the yellow advising note icon ().
- Click the “Update Note” button.

Advising Notes

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**Advising Note**

Institution University of Calgary	Created On 2022/01/25
Category Enrolment Services	Created By 
Subcategory Grading / GPA	Status Open
Assigned To 	Advisee Access Yes
Subject Question about ACCT 217	Contact Type Email Inquiry ( 5-15 min)

Update Note
Notify Advisee

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**Note Items**

Note Item	Entered On	Entered By	Comment
1	2022/01/25		Please contact the student, as he has a question re: a course.

Note: To notify the student of this note, hit “Notify Advisee”.



- Enter additional details to this existing advising note. This works the same as when adding a new note.

Notice that “Note Item 1” cannot be modified, if this is required, use [Method #2](#).

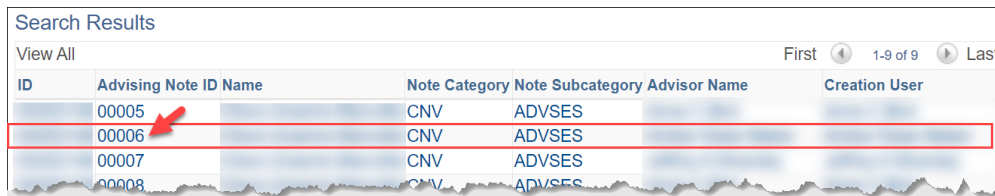
- Click the “Submit” button to save all changes.  
End.

## Method 2 – Update/Edit Advising Notes Using Regular Staff Component

This component has similar functionality to Method #1 but will also allow you to update closed notes or edit a previously entered advising note item text.

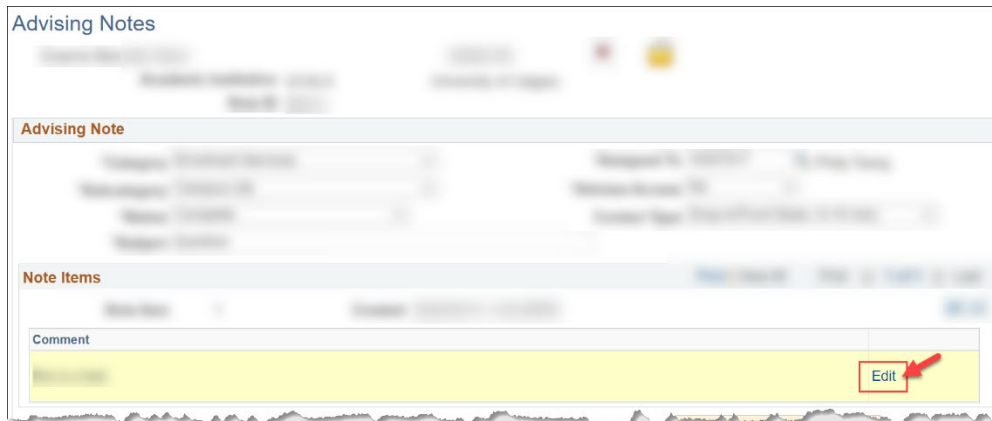
- Go to **Main Menu > Academic Advisement > Student Advisement > Advising Notes**
- Enter the search criteria to locate the student. Hit “Search”.

3. Click on the appropriate note row. For example, here we click Advising Note ID 00006.



ID	Advising Note ID Name	Note Category	Note Subcategory	Advisor Name	Creation User
00005		CNV	ADVSES		
00006		CNV	ADVSES		
00007		CNV	ADVSES		
00008		CNV	ADVSES		

4. To edit an existing note item, click the “Edit” link beside the comment.



Advising Notes

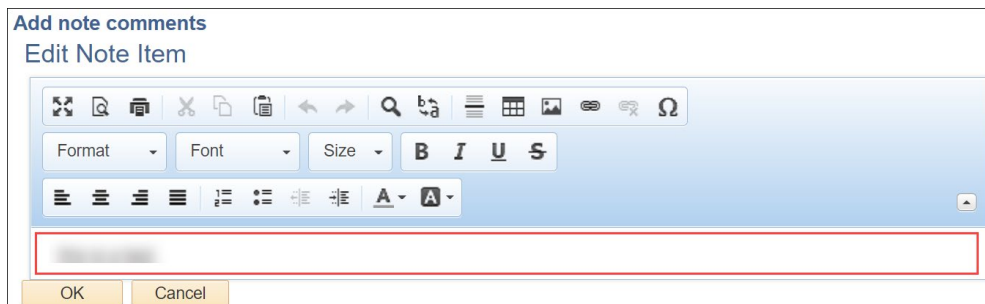
Advising Note

Note Items

Comment

Edit

5. Edit the text in the textbox. Hit “OK” when done.



Add note comments

Edit Note Item

Format Font Size B I U S

OK Cancel

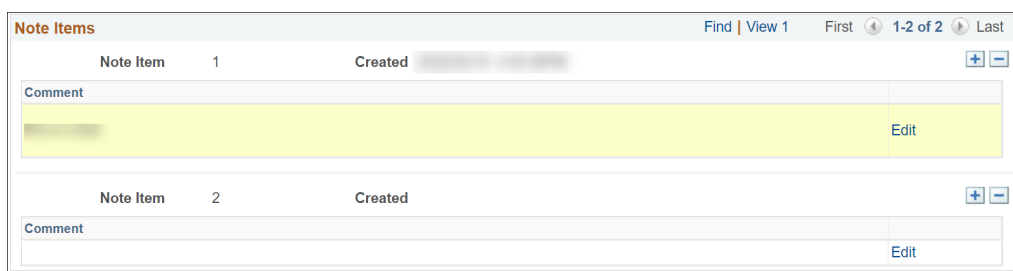
6. If you require another separate note item, hit the plus ‘+’ icon to insert another note row.



Note Items

+

You’ll now see more than one note item.

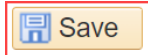


Note Items Find | View 1 First 1-2 of 2 Last

Note Item	1	Created	
Comment			Edit
Note Item	2	Created	
Comment			Edit

Note: Action Items and Attachments can be updated the same Method #1

- Hit the “Save” button to save all changes.



End

## How to Enter a Link in a Note

To define a hyperlink in a Advising Note comment, do the following steps:

*Note: if you just paste in the hyperlink the student will receive an error when trying to open the link unless they do a CTRL+click.*

- Enter the text you want displayed to the student.

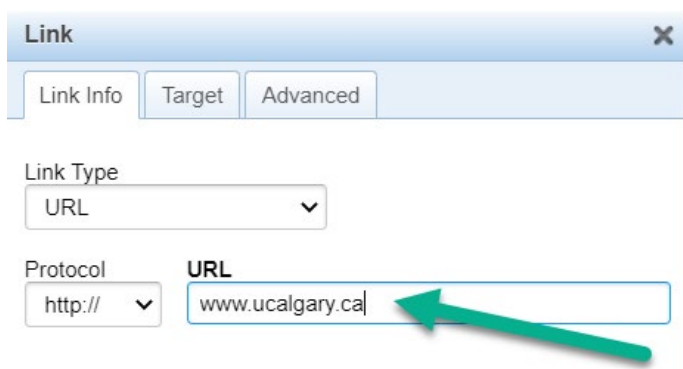
the term fee deadline.

- Select the entered text.

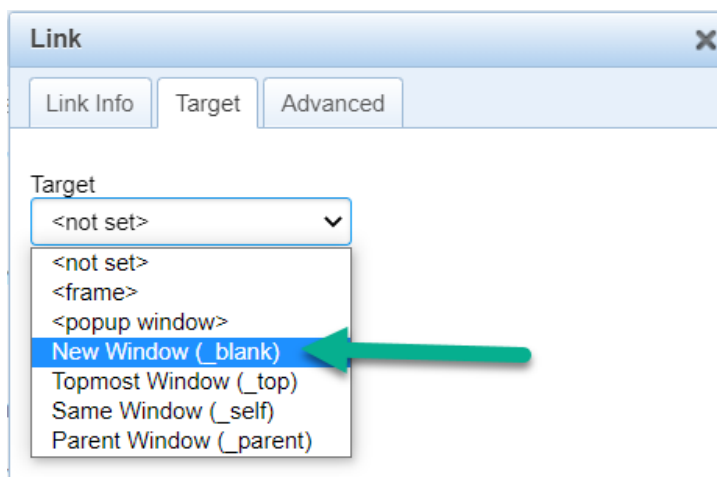
Link for text

- Click the hyperlink button from the tool bar (  ).

- Define the URL on the Link Info tab.

A screenshot of the "Link" dialog box, "Link Info" tab. The "Link Type" dropdown is set to "URL". The "Protocol" dropdown is set to "http://". The "URL" text box contains "www.ucalgary.ca" and is highlighted with a green arrow pointing to it from the right.

- Set the target to open in a new window on the Target tab

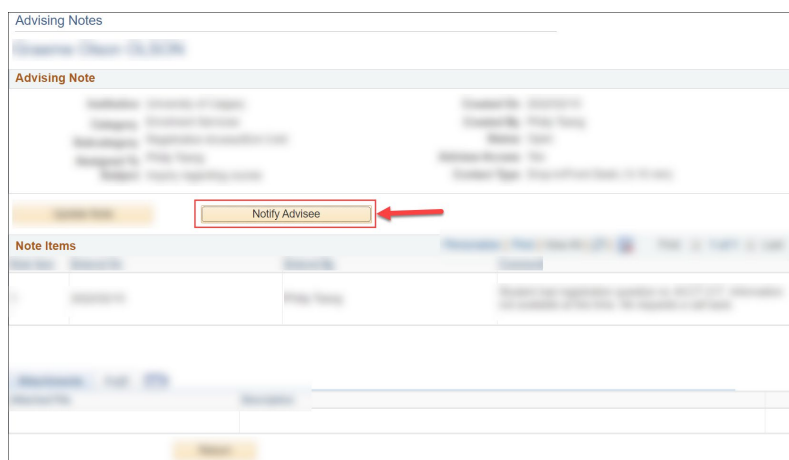
A screenshot of the "Link" dialog box, "Target" tab. The "Target" dropdown menu is open, showing options: "<not set>", "<frame>", "<popup window>", "New Window (\_blank)", "Topmost Window (\_top)", "Same Window (\_self)", and "Parent Window (\_parent)". A green arrow points to "New Window (\_blank)".

6. Click OK on the bottom of the Link window.  
End.

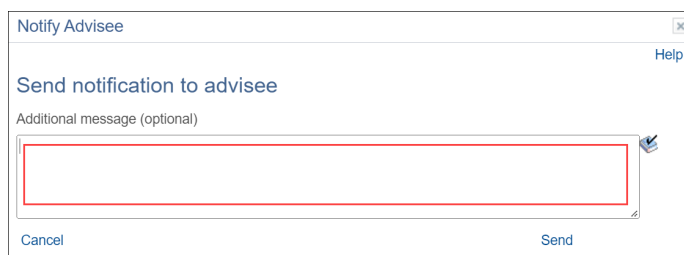
## How to Notify a Student

Students can be alerted to the note or reminded of outstanding items using email notifications.

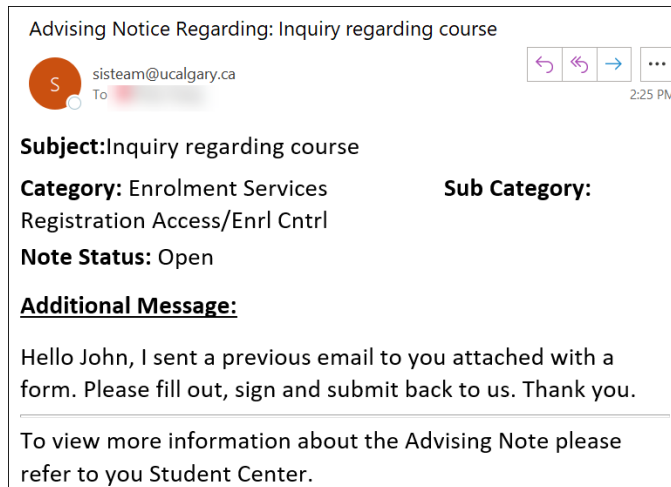
1. [View](#) or [Update](#) a particular note.
2. Click the “Notify Advisee” button.



3. A box allows you to enter a free-form text message:



4. They will receive an email similar to the following:



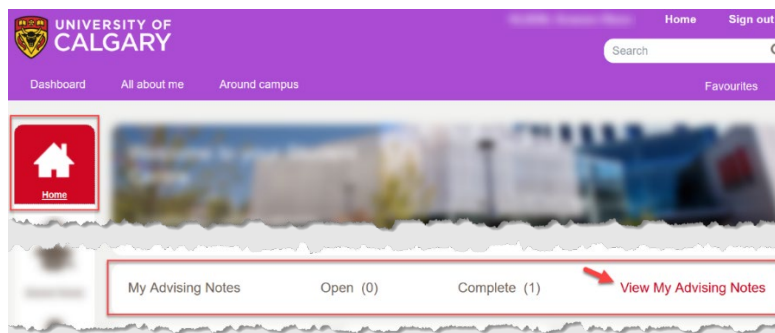
End.

## How a Student Views Advising Notes

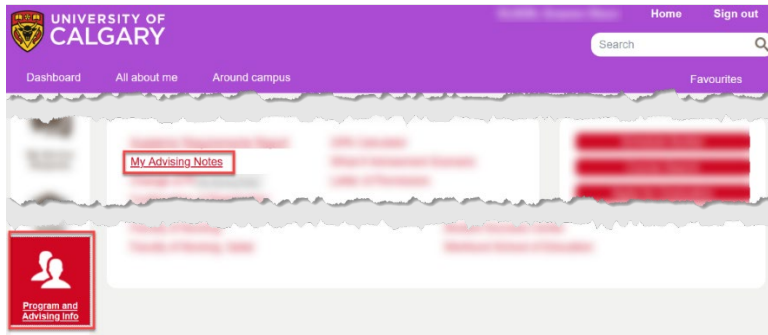
1. Student logs into their Student Centre at <https://my.ucalgary.ca>.
2. Advising notes as a student can be accessed in two locations in the student portal.

### Location #1 Home > View My Advising Notes

On the Home tab, a summary of the number of student accessible advising notes will appear in the “My Advising Notes” section. Click on “View My Advising Notes”.





### Location #2 On the “Program and Advising Info” tab, click on “My Advising Notes”.



- A list of student-visible advising notes is displayed. Click the yellow advising note icon (📄) for more details on any particular note.

Advising Notes


Below is list of your current Advising Notes, you can view the details of each note by clicking on the Advising Note icon. If a note has an open status you can reply to the Advisor and provide an attachment if required.


Student ID	Advising Note	Assigned To	Subject	Category	Subcategory	Contact Type	Status	Created On	Last Updated
			Final exam dates inquiry	Faculty of Science	Exams	In-Person Mtg ( 5 min)	1- Complete	2022/01/20	2022/01/20
			Registration – request document from student	Enrolment Services	Registration Support	Phone Call (15-30 Open min)		2022/01/20	2022/01/20

- If the note Status is 'Open' the student can click the "Update Note" button to submit an update.

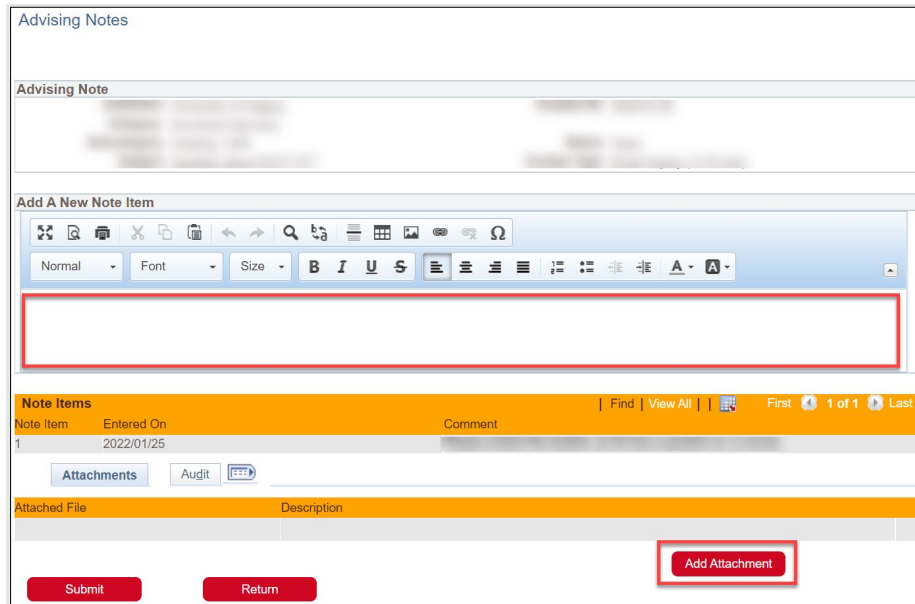
Advising Notes

Advising Note





- Student can enter free form text within the text box as well as add attachments.



Advising Notes

Advising Note

Add A New Note Item

Normal Font Size B I U S

Note Items | Find | View All | First 1 of 1 Last

Note Item	Entered On	Comment
1	2022/01/25	

Attachments Audit

Attached File	Description
---------------	-------------

Submit Return Add Attachment

6. Click the "Submit" button to save.

**Submit**

The advisor assigned to this note will then receive an email notification that an update by the student has been made.

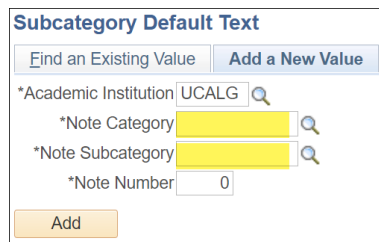
End.

## Defining Subcategory Default Text (for Administrators / Supervisors / Managers)

Used to define default blocks of text for a Category / Subcategory. When creating an advising note, staff can choose to use default text in the comment, which can be edited / saved. Access to define default text will be assigned to Supervisor/Senior roles.

### Add a New Default Text

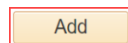
1. Go to **SetUp SACR > Product Related > Academic Advisement > Subcategory Default Text**
2. Enter “UCALG” as the Academic Institution.



Enter:

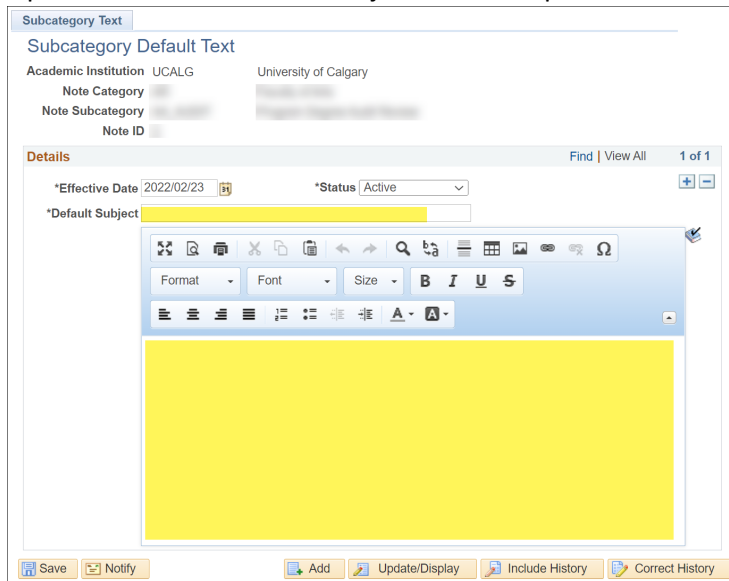
- Note Category: Click the magnifying glass to choose the Area/department you are advising for.
- Note Subcategory: Click the magnifying glass to choose the Advising subject area.
- Note Number: User must specify an unused Note Number to be assigned. If you choose a Note Number that already exists, it will be displayed with a corresponding message.

3. Click “Add”.





4. Update the text within the subject and description.



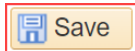
Effective Date: Defaults to current date.

Status: Defaults to “Active”.

Default Subject: Search title for default text.

Rich Text Field: Text that will be defaulted into the comment.

5. Hit “Save”.

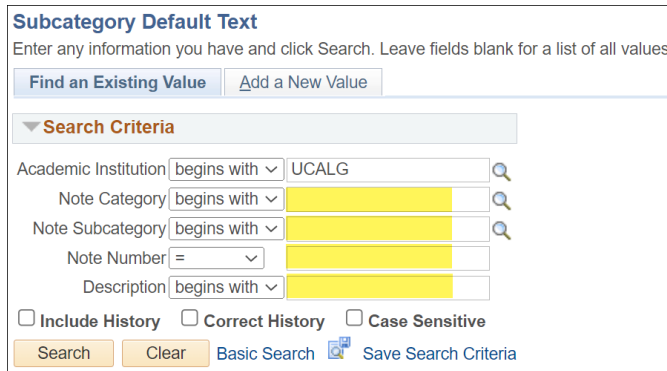


End.

### Find an Existing Default Text

1. Go to **SetUp SACR > Product Related > Academic Advisement > Subcategory Default Text**

2. Enter “UCALG” as the Academic Institution.



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

**Search Criteria**

Academic Institution: begins with

Note Category: begins with

Note Subcategory: begins with

Note Number:

Description: begins with

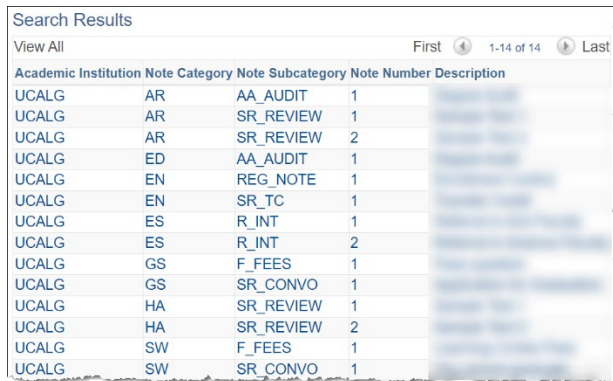
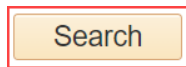
Include History  Correct History  Case Sensitive

If applicable, use the remaining fields to filter:

- Note Category: Area/department you are advising for.
- Note Subcategory: Advising subject area.
- Note Number: The unique ID for this note within the Category, Subcategory.
- Description: Search for specific note text (best to select “contains” in the dropdown).

Otherwise, leave fields blank to display all Default Text Notes.

3. Click “Search”.



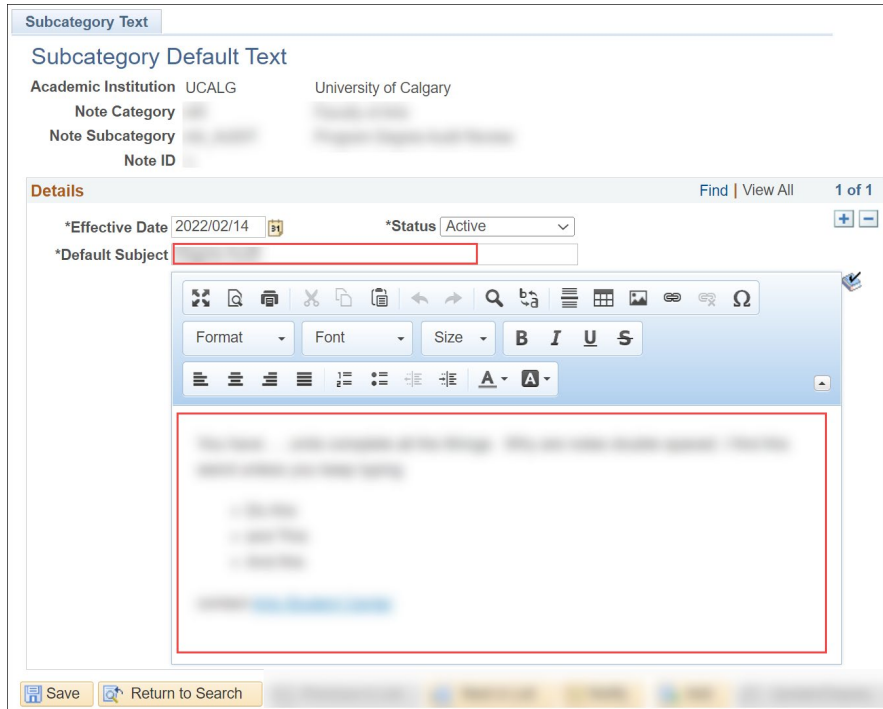
Search Results

View All First 1-14 of 14 Last

Academic Institution	Note Category	Note Subcategory	Note Number	Description
UCALG	AR	AA_AUDIT	1	
UCALG	AR	SR_REVIEW	1	
UCALG	AR	SR_REVIEW	2	
UCALG	ED	AA_AUDIT	1	
UCALG	EN	REG_NOTE	1	
UCALG	EN	SR_TC	1	
UCALG	ES	R_INT	1	
UCALG	ES	R_INT	2	
UCALG	GS	F_FEES	1	
UCALG	GS	SR_CONVO	1	
UCALG	HA	SR_REVIEW	1	
UCALG	HA	SR_REVIEW	2	
UCALG	SW	F_FEES	1	
UCALG	SW	SR_CONVO	1	

Click on the note row you wish to edit.

4. You can then view the details of the default text.



Subcategory Text

### Subcategory Default Text

Academic Institution UCALG University of Calgary

Note Category

Note Subcategory

Note ID

**Details** Find | View All 1 of 1

\*Effective Date 2022/02/14 \*Status Active

\*Default Subject

Format Font Size **B** *I* U ~~S~~

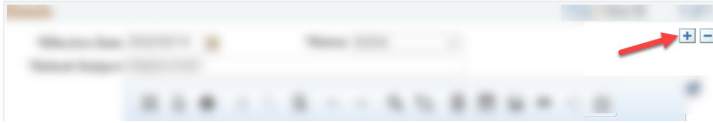
Save Return to Search

To view a different default text, hit the “Return to Search” button.

5. If you need to **modify** this default text:

Steps:

- a) Insert a new effective dated row by clicking the “plus” symbol. Effective date defaults to the current date.



- b) Modify the text within the subject and description as appropriate.

Subcategory Text

Subcategory Default Text

Academic Institution

Note Category

Note Subcategory

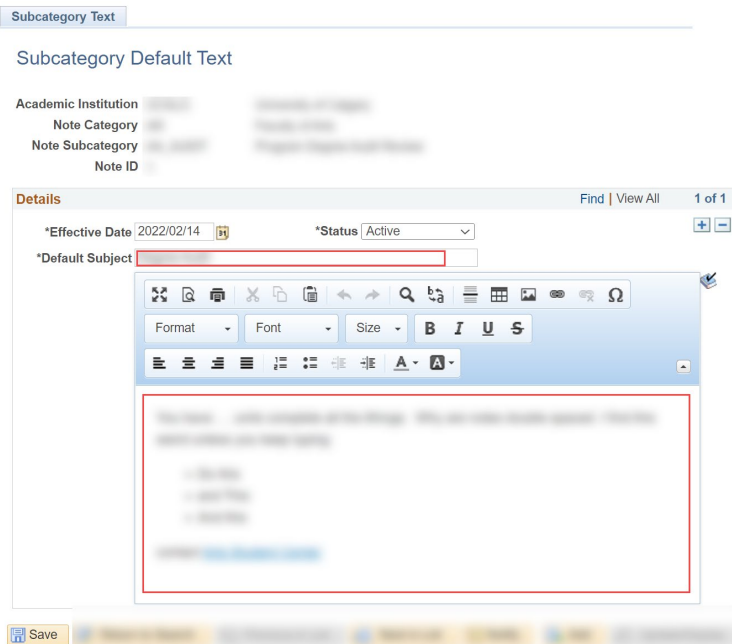
Note ID

**Details** Find | View All 1 of 1

\*Effective Date 2022/02/14

\*Status Active

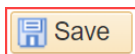
\*Default Subject



Effective Date: Defaults to current date.

Status: Defaults to “Active” to have the note accessible by users. Choose “Inactive” to prevent the note from being used by users.

6. Hit “Save”.



End.

## Queries

If you have the necessary permissions, the following PeopleSoft queries will allow you to view and download advising notes data to compile summary statistics.

Navigation: Reporting Tools > Query > Query Viewer

Notes:


- All Queries have a Folder: ADVISING NOTES and / or begin with 'UCAA\_ADV' for easier searching
- If exporting a long list of advising notes, use the Query Scheduler to run the query


### Query: Summary of Category/Subcategory Configuration (UCAA\_ADV\_NOTE\_TYPE\_CONFIG)


#### Description


Query to view a list of deployed note categories / subcategories within the system.

#### Search Parameters

\*Institution  

\*Eff Date as of  

Note Category  

Note Subcategory  

\*Include Active Cat/Subcat only

Parameter	Req/Opt	Description
Institution	Required	Defaults to 'UCALG'.
Eff Date as of	Required	As of date for the configuration.
Note Category	Optional	Specify if a specific Note Category is desired.
Note Subcategory*	Optional	Specify if a specific Note Subcategory is desired.
Include Active Category/Subcategory only	Required	Default to 'checked'. Uncheck if you want to see Active and Inactive Categories and Subcategories.

\*Note: if a Subcategory is selected without a Category, notes across all Categories will be included.

#### Results

Results sorted by: Category description, Subcategory description

Row	Institution	Category	Eff Date	Status	Descr	Short Desc	Link to Note Cat Config	Subcategory	Eff Date	Status	Descr	Short Desc	Link to Note SubCat Config
-----	-------------	----------	----------	--------	-------	------------	-------------------------	-------------	----------	--------	-------	------------	----------------------------

Heading	Description
Institution	'UCALG'
Category	Advising note category
Eff Date	Effective date of category for advising note
Status	Status of category (Active / Inactive)
Descr	Description of category
Short Descr	Short description of category
Link to Note Cat Config	Link to the advising note category configuration
Subcategory	Subcategory of advising note
Eff Date	Effective date of subcategory advising note
Status	Status of subcategory (Active / Inactive)

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Descr	Description of subcategory
Short Descr	Short description of subcategory
Link to Note Subcat Config	Link to the advising note subcategory configuration

## Query: Summary Data for Statistics (UCAA\_ADVISING\_NOTES\_STATS)

### Description

Query which can be used in Excel to do analysis of Advising Notes that have been created.

### Search Parameters

Parameter	Req/Opt	Description
Institution	Required	Defaults to 'UCALG'.
Created >=	Required	Notes created on or after the specified date.
Created <=	Required	Notes created on or before the specified date.
Category	Optional	Specify if a specific Category is desired.
Subcategory*	Optional	Specify if a specific Subcategory is desired.

\*Note: if a Subcategory is selected without a Category, notes across all Categories will be included.

### Results

Results are not sorted.

Row ID	Institution	Note ID	Category	Cat Descr	Subcategory	SubCat Descr	Status	Assigned to ID	Name	Created By	Name	Advisee Access	Contact Type	Contact Type Descr	Contact - Time Factor	Contact - Contact Type	Created On	Last Updated On	Nbr Days Open
--------	-------------	---------	----------	-----------	-------------	--------------	--------	----------------	------	------------	------	----------------	--------------	--------------------	-----------------------	------------------------	------------	-----------------	---------------

Heading	Description
ID	ID of student
Institution	'UCALG'
Note ID	Note ID of student
Category	Advising note category
Cat Descr	Description of category
Subcategory	Advising note subcategory
SubCat Descr	Description of subcategory
Status	Status of note
Assigned to ID	EMPLID of staff member assigned to the note
Name	Name of staff member
Created By	EMPLID of staff member who created the note
Name	Name of staff member
Advisee Access	Advisee access to view the note Yes/No
Contact Type	Contact type
Contract Type Descr	Description of contact type

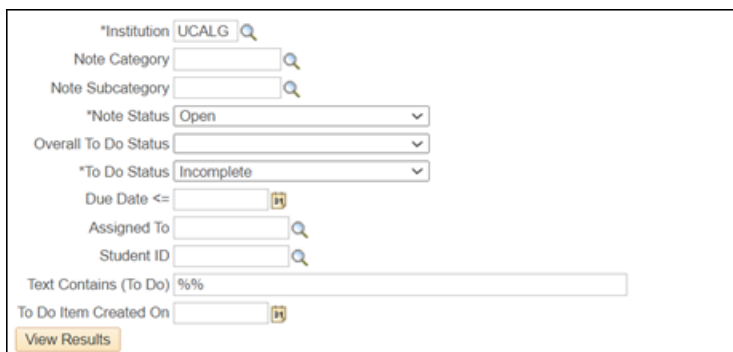
Contract – Time Factor	Time portion (first 2 character) of the Contact Type code Values: 01,05,15,30,99
Contact – Contact Type	Contact type portion (last 6 characters) of the Contact Type code
Created On	Note was created on
Last Updated On	Note was last updated on
Nbr Days Open	If the note is <b>Open</b> , then the number of days between the Created On date and the current date; if the note is <b>Closed</b> , then the number of days between the Created On date and the Last Updated On date

## Query: To Do Items for Advising Notes (UCAA\_ADVISING\_NOTE\_TODOS)

### Description

A query that allows users to search for outstanding To Do items (Action Items) associated to Advising Notes.

### Search Parameters



Parameter	Req/Opt	Description
Institution	Required	Defaults to 'UCALG'.
Category	Optional	Specify if a specific Category is desired.
Subcategory*	Optional	Specify if a specific Subcategory is desired.
Note Status	Optional	Specify if a specific note status is desired.
Overall To Do Status	Optional	Specify if a specific overall status is desired (None, Overdue, Pending). The overall status is calculated based on the Due Date and To Do status.
To Do Status	Optional	Specify if a specific To Do status is desired (Incomplete, Complete).
Due Date <=	Optional	Filter based on a Due date <= the specified date.
Assigned To	Optional	Filter based on To Do items assigned to a specific EMPLID.
Student ID	Optional	Filter based on a specific Student.
Text Contains (To Do)	Optional	Specify to filter where the To Do description contains the specific text: <ul style="list-style-type: none"> <li>The value will be matched regardless of upper/lower case</li> <li>Only text in the first 1,200 characters of the note will be searched</li> <li>Enter the desired text between the '%' characters (i.e. '%Program%')</li> </ul>

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Parameter	Req/Opt	Description
To Do Item Created On	Optional	Filter notes created on the specified date.

\*Note: if a Subcategory is selected without a Category, notes across all Categories will be included.

## Results

Results sorted by: Due Date, Student ID, Category description, Subcategory description

Row	ID	Name	Institution	Note ID	Note Category	Note SubCategory	Subject	Assigned To	Name	Note Status	Overall To Do Status	Action Item	Description	To Do Status	Due Date	Link
-----	----	------	-------------	---------	---------------	------------------	---------	-------------	------	-------------	----------------------	-------------	-------------	--------------	----------	------

Heading	Description
ID	Student ID
Name	Student name
Institution	'UCALG'
Note ID	Note ID
Note Category	Category description
Note Subcategory	Subcategory description
Subject	Subject of note
Assigned To	EMPLID of person note is assigned to
Name	Name of person assigned to note
Note Status	Note status
Overall To Do Status	The overall status of any To-Do Items (None, Overdue, Pending); the overall status is calculated based on the Due Date and To Do status
Action Item	Action item sequence number
Description	Description of action item
To Do Status	Status of action item
Due Date	Due date
Link	Link to the advising note

## Query: List of Advising Notes (UCAA\_ADV\_NOTES\_LIST)

### Description

General list of advising notes which can be run with a wide range of options.

### Search Parameters

*Institution	<input type="text" value="UCALG"/>	
Note Category	<input type="text"/>	
Note Subcategory	<input type="text"/>	
Note Assigned To	<input type="text"/>	
Note Status	<input type="text"/>	
Note Last Updated >=	<input type="text"/>	
Note Last Updated <=	<input type="text"/>	
Action Items	<input type="text"/>	
Student ID	<input type="text"/>	
Text Contains (Subject / Note) %%		



Parameter	Req/Opt	Description
Institution	Required	Defaults to 'UCALG'.
Category	Optional	Specify if a specific Category is desired.
Subcategory*	Optional	Specify if a specific Subcategory is desired.
Assigned To	Optional	Specify to filter based on notes assigned to a specific EMPLID.
Note Status	Optional	Specify the note status to be included (Open / Complete).
Note Last Updated >=	Required	Notes last updated on or after the specified date.
Note Last Updated <=	Required	Notes last updated on or before the specified date.
Action Items	Optional	Specify if a specific overall action item status is desired (None, Overdue, Pending). The overall status is calculated based on the Due Date and To Do status.
Student ID	Optional	Filter based on a specific Student.
Text Contains (Subject / Note)	Optional	Specify to filter where the Subject or Note contains the specific text: <ul style="list-style-type: none"> <li>The value will be matched regardless of upper/lower case.</li> <li>Only text in the first 1,200 characters of the note will be searched.</li> <li>Enter the desired text between the '%' characters (i.e. '%Program%').</li> </ul>

## Results

Results sorted by: Student ID, Category description, Subcategory description, Note ID, Note Dtl Seq

[Row ID](#) [Name](#) [Institution](#) [Note ID](#) [Note Category](#) [Note SubCategory](#) [Assigned To](#) [Name](#) [Status](#) [Created On](#) [Last Updated On](#) [Advisee Access](#) [Contact Type](#) [Subject](#) [Action Items](#) [Note Dtl Seq](#) [Date](#) [Long](#) [Link](#)

Heading	Description
ID	Student ID
Name	Student name
Institution	'UCALG'
Note ID	Note ID
Note Category	Category description
Note Subcategory	Subcategory description
Assigned To	EMPLID of staff member note is assigned to
Name	Name of the staff member note is assigned to
Status	Status of the note (Open / Complete)
Created On	Date note was created
Last Updated On	Date note was last updated
Advisee Access	Indicator if note is updated to the student (Yes / No)
Contact Type	Method / duration of contact with student
Subject	Subject of note
Action Items	The overall status of any To-Do Items (None, Overdue, Pending); the overall status is calculated based on the Due Date and To Do status
Note Dtl Seq	Note sequence number when there are multiple comments attached to the same note
Date	Date each comment for the note

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Long	Details of each comment
Link	Link to the Advising Note

Query: List of Advising Notes with Program Details (UCAA\_ADV\_NOTES\_LIST\_PROG)

## Description

General List of Advising notes which includes details about a student’s active program. This query is the same as the List of Advising Notes, however staff must specify a Career / Term and then can also specify a program / degree plan / primary plan.

## Search Parameters

### **UCAA\_ADV\_NOTES\_LIST\_PROG - Advising Notes (with Prog Dtl)**

---

\*Institution

Note Category

Note Subcategory

Note Assigned To

Note Status

Note Last Updated >=

Note Last Updated <=

Action Items

Student ID

Text Contains (Subject / Note)

\*Acad Career

\*Program as of Term

Acad Prog

Degree Plan

Primary Plan

Refer to List of Advising Notes for other parameters, the additional parameters are listed below:

Parameter	Req/Opt	Description
Acad Career	Required	Specify the student career to be included.
<a href="#">Program as of Term</a>	Required	Specify the term for the student information. Note: The student must be term activated in the specified term to be reported.
Acad Prog	Optional	Specify to filter based on the students Primary Program.
Degree Plan	Optional	Specify to filter based on the students Degree Plan.
Primary Plan	Optional	Specify to filter based on the students Primary Plan (i.e. UGRD - MAJ plan GRAD - AOS plan).

## Results

Results sorted by: Student ID, Category description, Subcategory description, Note ID, Note Dtl Seq

Row	ID	Name	Institution	Note ID	Note Dtl Seq	Note Category	Note SubCategory	Assigned To	Name	Status	Created On	Last Updated On	Advisee Access	Contact Type	Subject	Action Items	Note Date	Long	Link	Acad Prog	Joint Program	Degree Plan	Primary Plan	Acad Load
-----	----	------	-------------	---------	--------------	---------------	------------------	-------------	------	--------	------------	-----------------	----------------	--------------	---------	--------------	-----------	------	------	-----------	---------------	-------------	--------------	-----------


Heading	Description
ID	ID of student
Name	Name of student
Institution	'UCALG'
Note ID	Note ID
Note Dtl Seq	Note sequence number
Note Category	Category description
Note SubCategory	Subcategory description
Assigned To	EMPLID of staff member note is assigned to
Name	Name of staff member note is assigned to
Status	Status of note (Open / Complete)
Created On	Date note was created
Last Updated On	Date note was last updated
Advisee Access	Indicator if note is updated to the student (Yes / No)
Contact Type	Method / duration of contact with student
Subject	Subject description of note
Action Items	Action items if present
Note Date	Date note was created
Long	Long description
Link	Link to actual note
Acad Prog	Term activated program
Joint Program	Joint program indicator
Degree Plan	Degree Plan associated to term activated program
Primary Plan	Primary Plan associated to term activated program
Acad Load	Academic Load for the specified term


Query: [Student List of Advising Notes \(UCAA\\_ADV\\_NOTES\\_STDNT\\_SUM\)](#)


Description


List of an advising notes for a student


Search Parameters


\*Institution  


\*Student ID  

Category  

Subcategory  

Status  

Note Last Updated >=  

Note Last Updated <=  

Parameter	Req/Opt	Description
Institution	Required	Defaults to 'UCALG'.

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Student ID	Required	Specify the student's ID number.
Category	Optional	Specify if a specific Category is desired.
Subcategory*	Optional	Specify if a specific Subcategory is desired.
Note Status	Optional	Specify the note status to be included (Open / Complete).
Note Last Updated >=	Required	Notes last updated on or after the specified date.
Note Last Updated <=	Required	Notes last updated on or before the specified date.

### Results

Results sorted by: Created On Date (Descending), Category description, Subcategory description, Note Dtl Seq

Row ID Name Note ID Note Category Note SubCategory Note Assigned To Status Created On Last Updated On Advisee Access Contact Type Subject Action Items Status Note Dtl Seq Date Long

Heading	Description
ID	Student ID
Name	Student Name
Note ID	Note ID
Note Category	Category description
Note Subcategory	Subcategory description
Note Assigned To	Name of the staff member note is assigned to
Status	Status of the note (Open / Complete)
Created On	Date note was created
Last Updated On	Date note was last updated
Advisee Access	Indicator if note is updated to the student (Yes / No)
Contact Type	Method / Duration of contact with student
Subject	Subject of note
Action Items	The overall status of any To-Do Items (None, Overdue, Pending) The overall status is calculated based on the Due Date and To Do
Note Dtl Seq	Note Seq Nbr when there are multiple comments attached to the same note
Date	Date each comment for the note
Long	Details of each comment

### Converting the XML in the PS Query long text

While the use of rich text in the Advising Notes can help to clarify the discussion, in PS Query the field is displayed with the HTML code which can make it challenging to read. You can perform the following steps to use an advanced macro to remove the HTML code to make the content more readable.

Note: the logic to remove the HTML codes was built using the existing rich text values that have been stored in Service Requests over the past year. It is possible that some HTML code might be missed in the macro.

This applies to the following queries:

Query	Macro
List of Advising Notes	Adv_Notes_List
List of Advising Notes with Program Details	Adv_Notes_List
Student List of Advising Notes	Adv_Notes_Student_List

Step 1: Run the desired query and download it into excel

Step 2: Open the 'PS Query HTML Conversion Macro' document which contains the macro's to be used, ensure that you click the 'Enable Content' button if it appears.

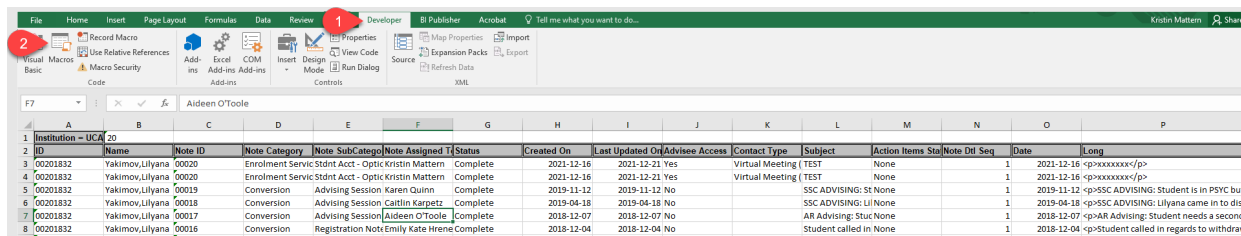
Step 3: Open the query results in excel, ensure you click on the 'enabled editing' button if it appears.

Step 4: Run the desired Macro

1) Select the 'Developer' Menu Item

*Note: if you do not have the 'Developer' Menu item please read section 11)*

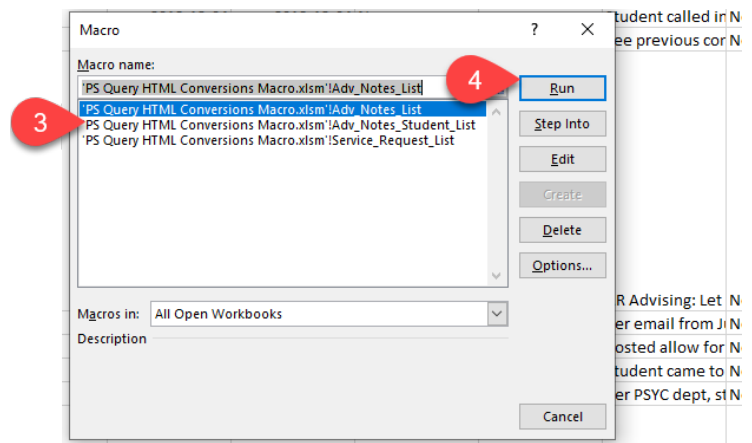
2) Select the 'Macro' icon



ID	Name	Note ID	Note Category	Note SubCategory	Note Assigned To	Status	Created On	Last Updated On	Advisee Access	Contact Type	Subject	Action Items	Sta	Note Dtl Seq	Date	Long
1	Institution = UCA	20														
3	Yakimov, Liliyana	00020	Enrolment Service	Stdrnt Acct - Optic	Kristin Mattem	Complete	2021-12-16	2021-12-21	Yes	Virtual Meeting	( TEST	None	1	2021-12-16	-<p>xxxxxxx</p>	
4	Yakimov, Liliyana	00020	Enrolment Service	Stdrnt Acct - Optic	Kristin Mattem	Complete	2021-12-16	2021-12-21	Yes	Virtual Meeting	( TEST	None	1	2021-12-16	-<p>xxxxxxx</p>	
5	Yakimov, Liliyana	00019	Conversion	Advising Session	Karen Quinn	Complete	2019-11-12	2019-11-12	No		SSC ADVISING: St None	None	1	2019-11-12	-<p>SSC ADVISING: Student is in PSYC but	
6	Yakimov, Liliyana	00018	Conversion	Advising Session	Caitlin Karpetz	Complete	2019-04-18	2019-04-18	No		SSC ADVISING: LI None	None	1	2019-04-18	-<p>SSC ADVISING: Liliyana came in to disc	
7	Yakimov, Liliyana	00017	Conversion	Advising Session	Aideen O'Toole	Complete	2018-12-07	2018-12-07	No		AR Advising: Stuc None	None	1	2018-12-07	-<p>AR Advising: Student needs a second	
8	Yakimov, Liliyana	00016	Conversion	Registration Note	Emily Kate Hrene	Complete	2018-12-04	2018-12-04	No		Student called in	None	1	2018-12-04	-<p>Student called in regards to withdraw	

3) Select the correct Macro from the list based on the query being updated

4) Click 'Run'



For display purposes:

- If there is a bulleted list in the comment / note it will be changed to start on a new line with an '\*'
- If there is an image or a table it will be removed and the text (Image Removed) or (Table Removed) will be added in its place

### Example of Before / After

Dtl Seq	Date	Long
1	2021-12-16	<p>xxxxxxx</p>
1	2021-12-16	<p>Test default note&nbsp;<span style="color:#c0392b;">red</span></p><p><span style="color:#c0392b;">dakjfkjsa&nbsp;</span></p><p>&nbsp;</p><p><span style="color:#c0392b;"></span></p>
1	2019-11-12	<p>SSC ADVISING: Student is in PSYC degree to either MULTI or ANSC. Looked at the degree structure and content and student submit COP application for ANSC Wellbeing and Resiliency cert through Referred to ASC to discuss time to completion credit would be applied to ANSC rather than PSYC and courses required. Showed student how to look at dept websites. Looked at research methods other 400 level ANTH classes as student in one of those for W20.</p>
1	2021-12-16	xxxxxxx
1	2021-12-16	Test default note red dakjfkjsa  (Image Removed)
1	2019-11-12	SSC ADVISING: Student is in PSYC but wants to change degree to either MULTI or ANSC. Looked at courses completed and the degree structure and content for both and helped student submit COP application for ANSC and Mental Wellbeing and Resiliency cert through their student centre. Referred to ASC to discuss time to completion, how transfer credit would be applied to ANSC rather than PSYC and courses required. Showed student how to look at course outlines on dept websites. Looked at research methods class for ANTH and other 400 level ANTH classes as student would like to register in one of those for W20.
1	2019-11-12	<p>SSC ADVISING: Lilyana came in to c