# Creating & Managing Notes (Advisor)

Overview

Advising notes support continuity and provide shared historical context for the advisee and the success team. Advisor Link's note-taking tools help you manage the advising notes you create, while respecting advisees' confidentiality rights.

Considerations

At different points in your workflow, you'll want to jot down an advising Note. It's convenient to have options, so let's get familiar with how you can take notes from almost anywhere in the app, without switching away from other work in progress.

Ways to View and Add Notes

1. From the app navigation menu, click **Notes** to access the Notes home page.
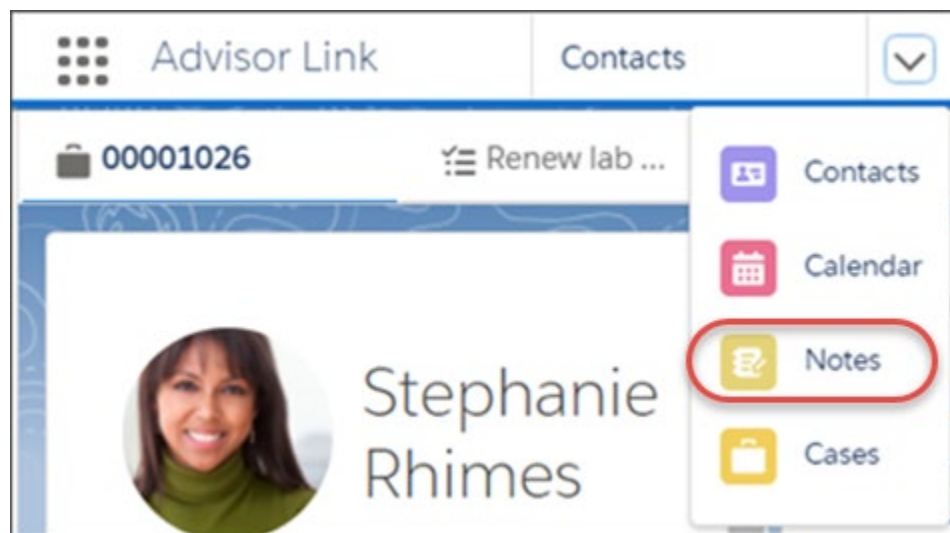
- The Notes home page lists your notes. Use the list view selector to see all of your notes or a filtered subset.
- **Adding a note here will not automatically associate the note to a student. This is a manual process. See Below: Write a Note Related to an Advisee.**

2. From the utility bar in the footer, click **Notes** to pop open a Notes scratchpad over your workspace and see a compact list view of all of your Notes or a filtered subset.
   - You can also click **New** in the Notes scratchpad to pop open a Notes composer window over your workspace.
   - **Adding a note here will not automatically associate the note to a student. This is a manual process. See Below: Write a Note Related to an Advisee.**

3. **Recommended Method for adding a note.** From the Appointment Manager's Action shortcuts menu, you can add a Note that's automatically related to the advisee record Case for the appointment that you're viewing. Click **Action** and select **Add Note**.
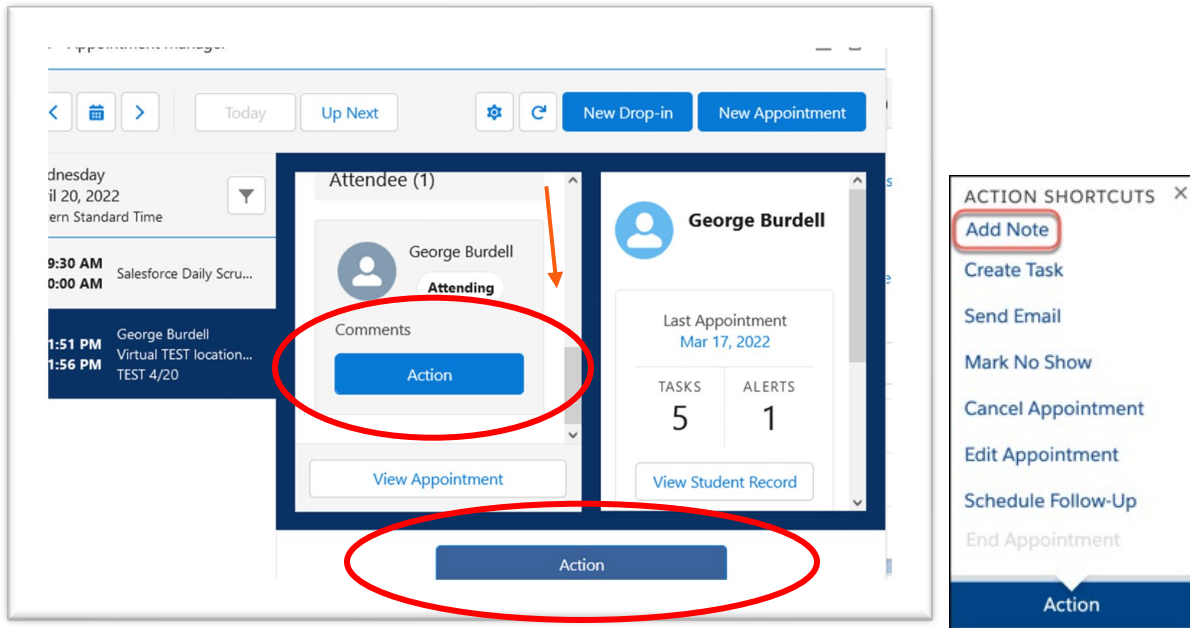
Once Add Note is clicked you will see what record the note will be associated to at the bottom of the page. As you type the note it will be auto saved.

Note: The **Related to** field here has the Case Record (Yellow Briefcase icon), The Contact record (Purple Contact Card icon) and the Appointment Record (Pink Alarm Clock icon) for this specific interaction with the advisee George Burdell.
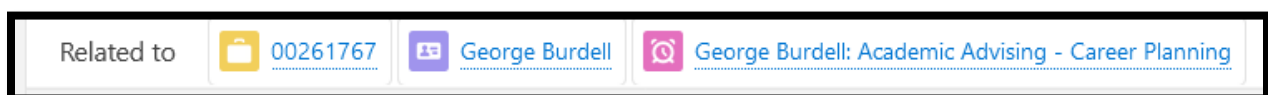
4. **Recommended Method for adding a note.** Or, from an advisee record, go to the Notes related list to see a compact list view of your most recent Notes about the advisee.
   - See Below: Write a Note Related to an Advisee.

   - Another way to view a list of notes. From the Notes related list, click **View All** to open a new tab that shows a list view with more details.

Write a Note Related to an Advisee – Same as number 4 above with more detail.

To write a Note related to a specific advisee, save time and scrolling by starting the Note when the advisee context is already established, such as from the advisee record.

1. From anywhere in an advisee record where you can start a Note, click **New**.
2. Either in the new tab that opens in the console or in the Notes composer window that opens, write your advising note. **Verify that the advisee record Case is prefilled in the Note next to Related To.**

3. Update other Note details and visibility settings as needed.
4. If you're working in the Notes composer window, click **Done** to save the Note.

If you created the Note without the advisee context already established, you can manually relate the Note to the advisee record. Just make sure that you relate the Note to the advisee Case record, and not the advisee Contact record. As long as the Note isn't marked as private, relating the Note to the advisee record Case makes it visible to other Users who have access to the Case.

Format Your Advising Notes

Notes allow rich text formatting so you can emphasize important details with bold or italic text. You can include bulleted lists and numbered lists, and even images inline in the Note.

Edit Your Advising Notes

Only you (or an Advisor Link administrator) can edit a Note that you created. Click into any Notes view, start editing the Note text and details as needed, and remember to save your changes if they're not automatically saved.

If you've shared a Note with other Users, they can view the Note but they can't edit it.

Delete an Advising Note

Only you (or an Advisor Link administrator) can delete a Note that you created.

1. Open the Note in any view.
2. In most views, click **Delete**. If you're viewing the Note in the advisee record related list, look for the Delete option in the actions menu next to the Note

3. Confirm the deletion.