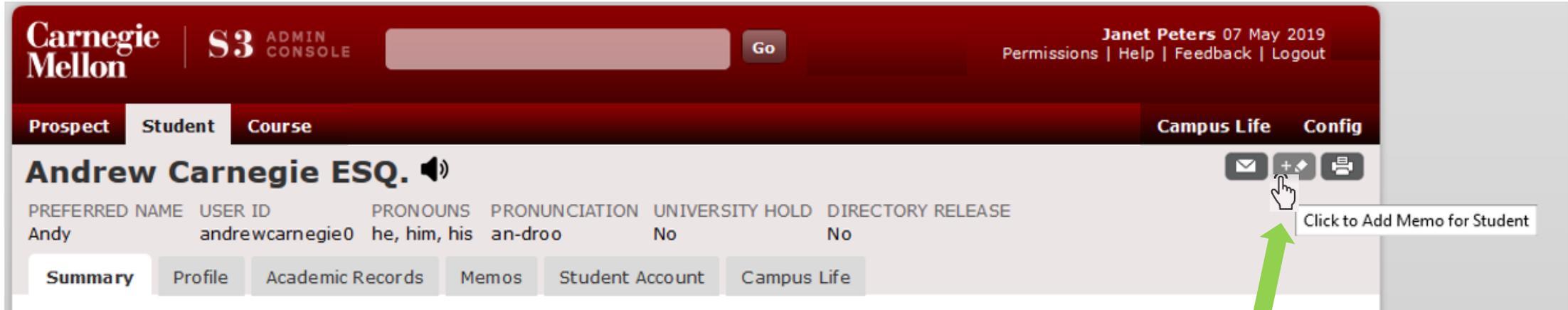




# S3 Memos User Guide



The screenshot shows the S3 Admin Console interface. At the top, there is a header with the Carnegie Mellon logo, 'S3 ADMIN CONSOLE', a search bar, and a 'Go' button. On the right, it displays the user 'Janet Peters' and the date '07 May 2019', along with links for 'Permissions', 'Help', 'Feedback', and 'Logout'. Below the header, there are navigation tabs for 'Prospect', 'Student', 'Course', 'Campus Life', and 'Config'. The 'Student' tab is selected, showing the profile for 'Andrew Carnegie ESQ.'. The profile includes fields for 'PREFERRED NAME' (Andy), 'USER ID' (andrewcarnegie0), 'PRONOUNS' (he, him, his), 'PRONUNCIATION' (an-droo), 'UNIVERSITY HOLD' (No), and 'DIRECTORY RELEASE' (No). Below the profile, there are tabs for 'Summary', 'Profile', 'Academic Records', 'Memos', 'Student Account', and 'Campus Life'. A green arrow points to a pencil icon in the top right corner of the student header, with a tooltip that says 'Click to Add Memo for Student'.

To write a memo, you must go to the student's S3 page.

Click on the Pencil icon located on the top of the student's header to open the Add Memo modal. You can be on any of the tabs within the student's page when you write the memo - the pencil icon is always visible.



# Writing a Memo

## Select a Topic

**Add Memo**  
for Andy Carnegie

Domain: University Acad Advising Who can see this memo?

Topic: Select a Memo Topic

Subject: Select a Memo Topic

- Academic Action
- Academic Advising
- Department Changes
- Enrollment Condition
- Grades
- Leave of Absence
- Name Changes
- Other
- Persistence
- Transfer Credit
- Withdrawal

Notify: ?

Task: Create Task

Save Cancel

Once a Domain has been selected, the “Topics” dropdown will be populated with the list of topics related to that Domain. Select a Topic.

# Writing a Memo

## Formatting & Visibility Added

The screenshot shows the 'Add Memo' interface for Andy Carnegie. The domain is 'Academic Record' and the topic is 'Academic Advising'. The subject is 'Memo testing'. The memo body contains the text 'Here is some fancy formatting' (highlighted in green), a bulleted list item 'I love Scottie Dogs' (highlighted in blue), and an image of a Scottie dog. A 'Who can see this memo?' dialog is open, showing a list of users with their USERID, FIRST NAME, and LAST NAME. A green arrow points from the dialog to the 'Who can see this memo?' link in the memo body.

**Add Memo**  
for Andy Carnegie

Domain: Academic Record  
Topic: Academic Advising  
Subject: Memo testing

**Who can see this memo?**

These users, in addition to anyone who is assigned a Task or Notify, can view this memo:

USERID	FIRST NAME	LAST NAME
sparunac	Suganth	Arunachalam
jbrandon	Jamie	Brandon
nm2d	Nancy	Camino
js81	Joy	Cavaliero
ahcohen	Andrea	Cohen
mconnerd	Marjorie	Conner Dawkins
bfernand	Brian	Fernandes
dg0e	Deborah	Gerhardt
kg0q	Karen	Giannangeli
cgilchri	Christine	Gilchrist

Formatting is available on memos, including copying and pasting images into the body.

In addition, a link with information about who has access to the memo is included, adding increased transparency.

# Writing a Memo

## Add Notifications to Memos

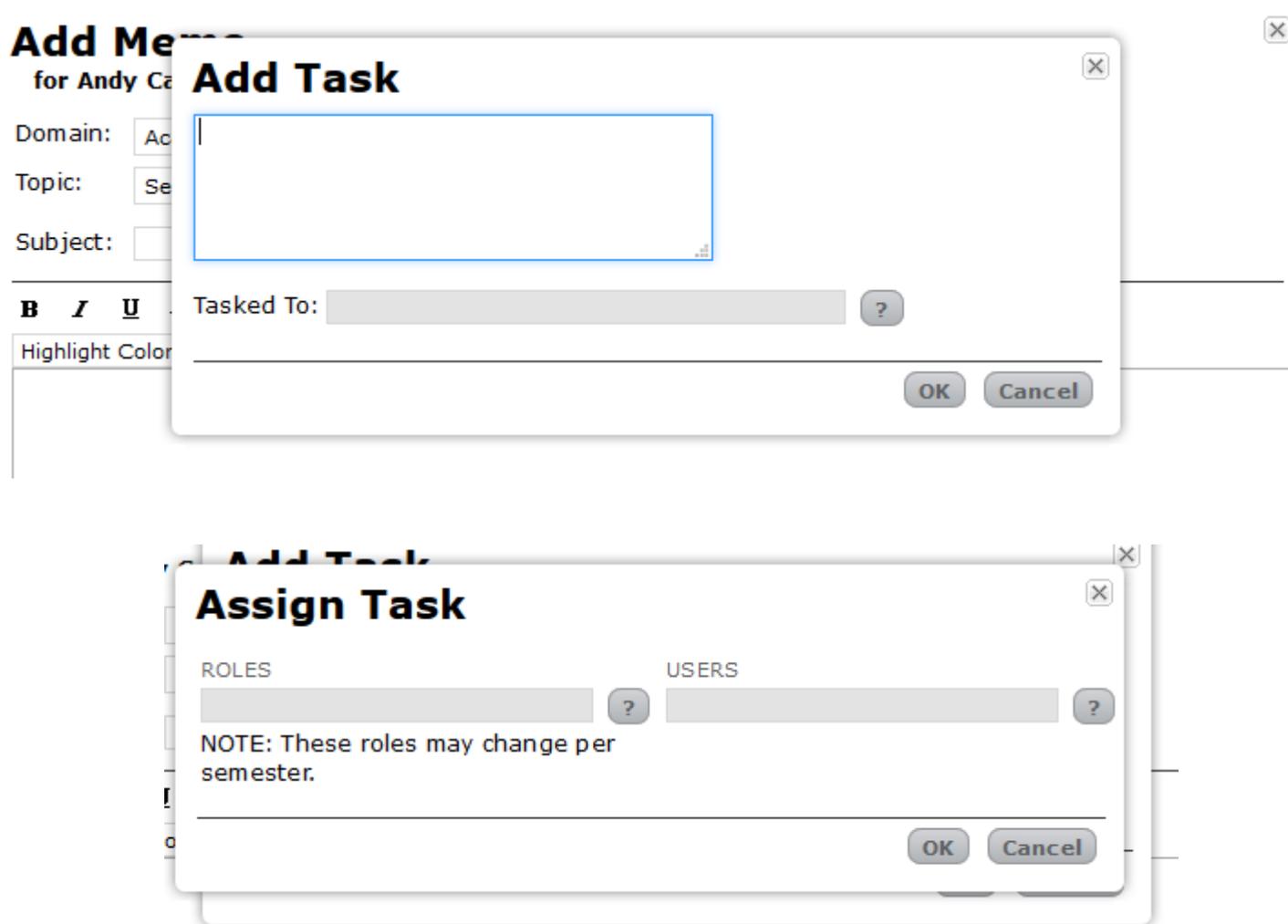
The screenshot shows the 'Add Memo' interface for Andy Carnegie. The 'Domain' is set to 'Academic Record'. The 'Topic' is 'Select a Topic' and the 'Subject' is empty. A rich text editor is visible with formatting options like Bold, Italic, Underline, and Highlight Color. A 'Notify:' field at the bottom has a question mark icon circled in green. An 'Assign Notification' modal is open, showing 'ROLES' and 'USERS' fields, each with a question mark icon. A note states: 'NOTE: These roles may change per semester.' The modal has 'OK' and 'Cancel' buttons. A vertical black bar is on the right side of the interface.

Click on the question mark next to the “Notify” box, and an “Assign Notification” modal will appear.

This permits you to alert someone that an important memo has been added. If the person you wish to alert doesn’t already have access to the memo, this notification will grant them access.

# Writing a Memo

## Add Tasks to Memos



You can add a task to a memo. To add a task, click the “Create Task” button on the memo. The “Add Task” modal will appear.

Once you have typed the task, you can click “Assign Task” to assign it to a role or specific user. If the person to whom you assign the task doesn’t already have access to view the memo, the assigned task will grant them access.

- You can assign Notifications and Tasks in two different ways: By selecting a **specific user**, or by selecting the **role**.
- The difference between the two is that the selection of a specific user means that if that individual changes jobs, or leaves the university, the assignment remains with them.
- If the assignment is designated to a role, then if the person in that role switches jobs, or a student changes majors, the new person in that role will receive that Notification and/or Task instead.

# Writing a Memo

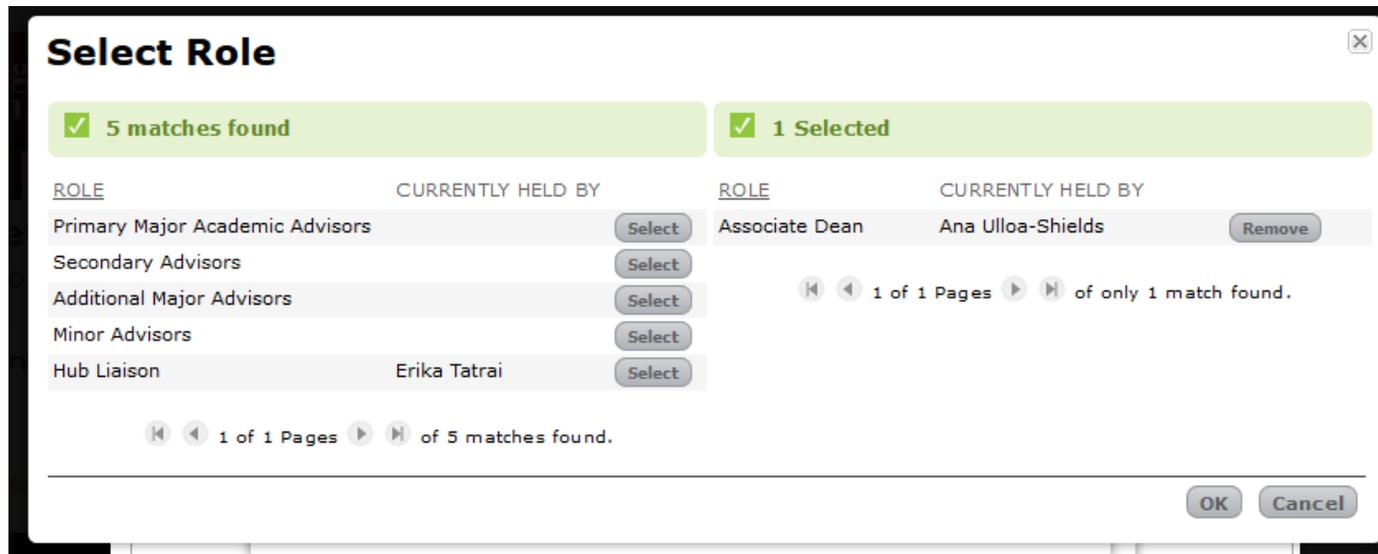
## New Finder Screen for Selecting Roles

### ROLES



**NOTE:** These roles may change per semester.

To select someone in a Role, click the question mark to open a new screen.



The screenshot shows a dialog box titled "Select Role" with a close button (X) in the top right corner. It features two columns of role information. The left column has a green header with a checkmark and "5 matches found". It lists roles with "CURRENTLY HELD BY" information and a "Select" button for each. The right column has a green header with a checkmark and "1 Selected". It shows the "Associate Dean" role held by "Ana Ulloa-Shields" with a "Remove" button. Both columns have pagination controls at the bottom. The dialog also has "OK" and "Cancel" buttons at the bottom right.

ROLE	CURRENTLY HELD BY	ROLE	CURRENTLY HELD BY
Primary Major Academic Advisors		Associate Dean	Ana Ulloa-Shields
Secondary Advisors			
Additional Major Advisors			
Minor Advisors			
Hub Liaison	Erika Tatrai		

To select a Role, click the “Select” button. Once selected, the Role will move from the left side of the screen over to the right. If you change your mind, you can click “Remove” and the Role will move back over to the left. “Currently Held By” does not need to contain a name in order for the Role to be selected.

# Writing a Memo

## New Finder Screen for Selecting Individuals

USERS



To select a User, click the question mark to open a new screen.

### Find User

USER ID  LAST NAME (%)  FIRST NAME (%)

2 matches found

USER ID	LAST NAME	FIRST NAME	
jmpeters	Peters	Janet	<input type="button" value="Select"/>
jp7p	Papinchak	John	<input type="button" value="Select"/>

1 of 1 Pages of 2 matches found.

You can search for a User by Andrew ID, First and/or Last name. The results will populate below the search criteria. To select a User, click the “Select” button. Once selected, that User will move from the left side of the screen over to the right. If you change your mind, you can click “Remove” and the User will move back over to the left.

# Writing a Memo

**Add Memo** ✕  
for Andy Carnegie

Domain: University Acad Advising Who can see this memo?

Topic: Other

Subject: Adding a Memo

---

**B** *I* U  $x_2$   $x^2$

Highlight Color  Font Color  Font  Size

Here is some *fancy formatting*

- I love Scottie Dogs



Notify: Janet Peters; ?

Task: Associate Dean; View Task

---

Save Cancel

When your Memo is ready, select the “Save” button at the bottom of the modal.

# Old Memo Screen

**Prospect** **Student** **Course** **Admission** **Registrar** **Student Accounts** **Campus Life**

## Andrew Carnegie ESQ.

PREFERRED NAME	USER ID	PRONOUNS	PRONUNCIATION	UNIVERSITY HOLD	DIRECTORY RELEASE
Andy	andrewcarnegie0	he, him, his	an-droo	No	No

**Summary** **Profile** **Academic Records** **Memos** **Student Account** **Campus Life**

### Memos

▶ DATE	TIME	ACCESS CODE	TYPE CODE	AUTHOR	SUBJECT
▶ 06 May 2019	08:53	H	E	JBRANDON	ENR STAT CH
▶ 06 May 2019	08:53	H	E	JBRANDON	ENR STAT CH
▶ 18 Apr 2019	15:12	H	E	JBRANDON	ENR STAT CH
▶ 18 Apr 2019	14:36	H	E	JBRANDON	ENR STAT CH
▶ 17 Apr 2019	11:26	H	E	JBRANDON	ENR STAT CH
▶ 23 Mar 2019	07:00	H	X	SAO AUTO	Hold Removed
▶ 21 Mar 2019	07:53	H	E	JBRANDON	ENR STAT CH
▶ 21 Mar 2019	07:53	H	E	JBRANDON	ENR STAT CH
▶ 21 Mar 2019	07:53	H	E	JBRANDON	ENR STAT CH
▶ 20 Mar 2019	12:36	H	E	JBRANDON	ENR STAT CH
▶ 20 Mar 2019	11:49	H	E	JBRANDON	ENR STAT CH
▶ 12 Mar 2019	07:00	H	X	SAO AUTO	Hold Added
▶ 08 Mar 2019	11:47	H	E	JBRANDON	ENR STAT CH

# New Memo Screen

**Andrew Carnegie ESQ.**    

PREFERRED NAME USER ID PRONOUNS PRONUNCIATION UNIVERSITY HOLD DIRECTORY RELEASE  
Andy andrewcarnegie0 he, him, his an-droo No No

Summary Profile Academic Records **Memos** Student Account Campus Life

## Student Memos

[Best Practices for S3 Memos](#)

SUBJECT/BODY  DATE FROM  DATE TO  AUTHOR  ?

MEMO DOMAIN  ? MEMO TOPIC  ? ATTRIBUTE  ?

[Find More](#) [Find](#) [Clear](#)

 **89 matches found**

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PREVIEW	ATTRIBUTES
29 May 2019	Janet Peters	University Acad Advising	Other	Adding a Memo	<a href="#">Here is some fancy format...</a>	
23 May 2019	ENRPROD	Enr Services Student	Enrollment Condition	ENR ST CH	<a href="#">S19 - Student enrollment ...</a>	
06 May 2019	Jamie Brandon	Enr Services Student	Enrollment Condition	ENR STAT CH	<a href="#">Authorized by: Jamie Bra...</a>	
06 May 2019	Jamie Brandon	Enr Services Student	Enrollment Condition	ENR STAT CH	<a href="#">Authorized by: Jamie Bra...</a>	
18 Apr 2019	Jamie Brandon	Enr Services Student	Enrollment Condition	ENR STAT CH	<a href="#">Authorized by: Jamie Bra...</a>	
18 Apr 2019	Jamie Brandon	Enr Services Student	Enrollment Condition	ENR STAT CH	<a href="#">Authorized by: Jamie Bra...</a>	
17 Apr 2019	Jamie Brandon	Enr Services Student	Enrollment Condition	ENR STAT CH	<a href="#">Authorized by: Jamie Bra...</a>	

Things to note:

- You can now search for a specific memo on a student's memo page.
- The screen displays a Preview of the memo: Text only, with no formatting (including images)
- Clicking on the [blue Preview](#) opens the memo for viewing.
- There are Attributes associated with memos, signified by icons displayed next to the memo.

# Attribute Icons

---

## ATTRIBUTES



Each icon has text that appears when you hover over it.



There is information in this memo that you have not read and you are in the notification list.



This memo has an uncompleted task that has been assigned to you.

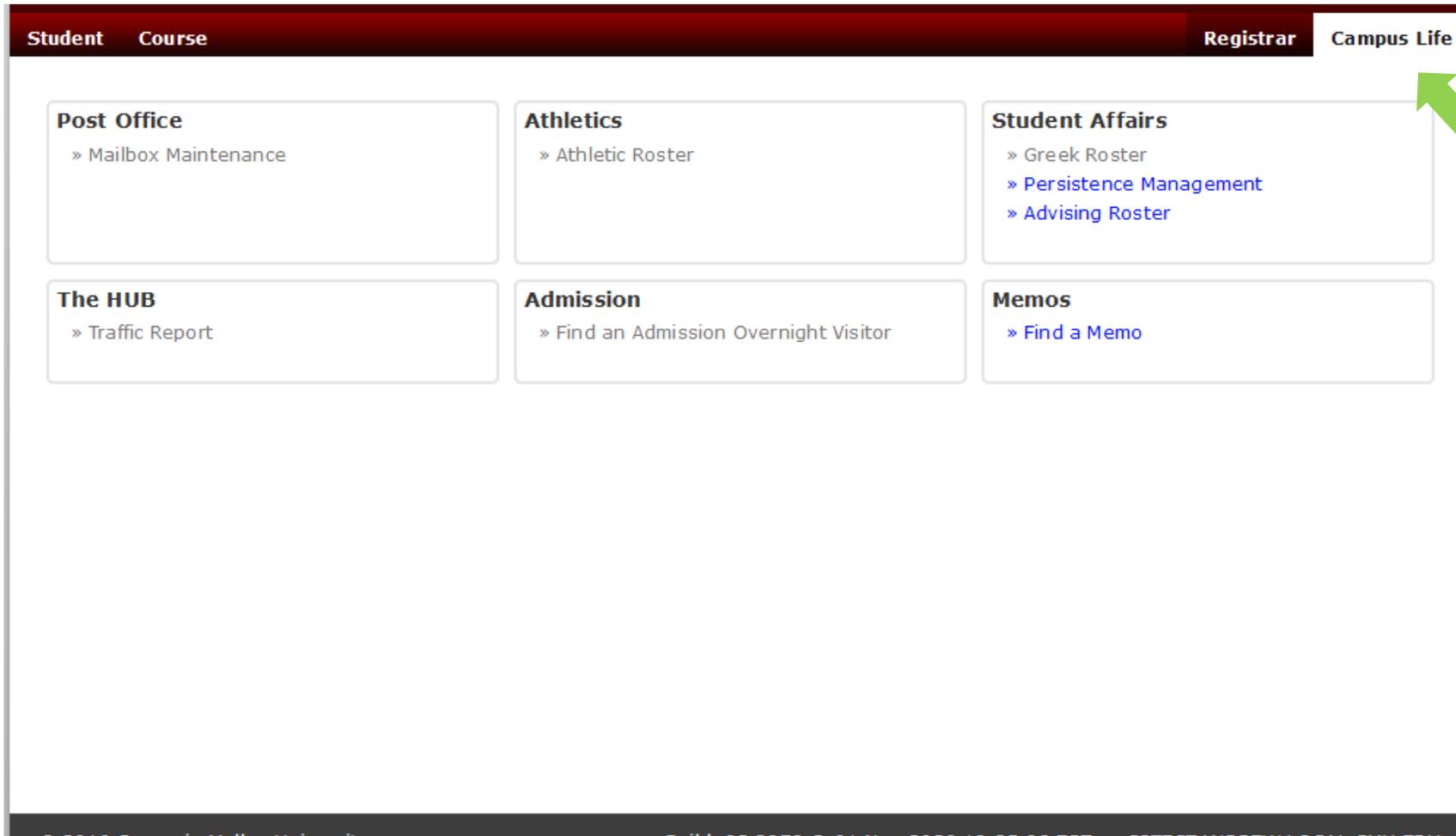


This memo has comments.



This memo was generated by the S3 system.

# Find a Memo



To find a memo, go to the Campus Life tab.

Anyone who has access to memos also has access to this screen.

# Find a Memo

The "Subject/Body" search field is automatically "wildcarded" (i.e., it will look for the letter combination in both the subject and the body of the memo).

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PROSPECT/STUDENT	PREVIEW	P/S	ATTRIBUTES
29 May 2019	Janet Peters	University Acad Advising	Other	Adding a Memo	Andy Carnegie	Here is some fancy format...	S	

Your name is pre-populated in the "Author" search filter.

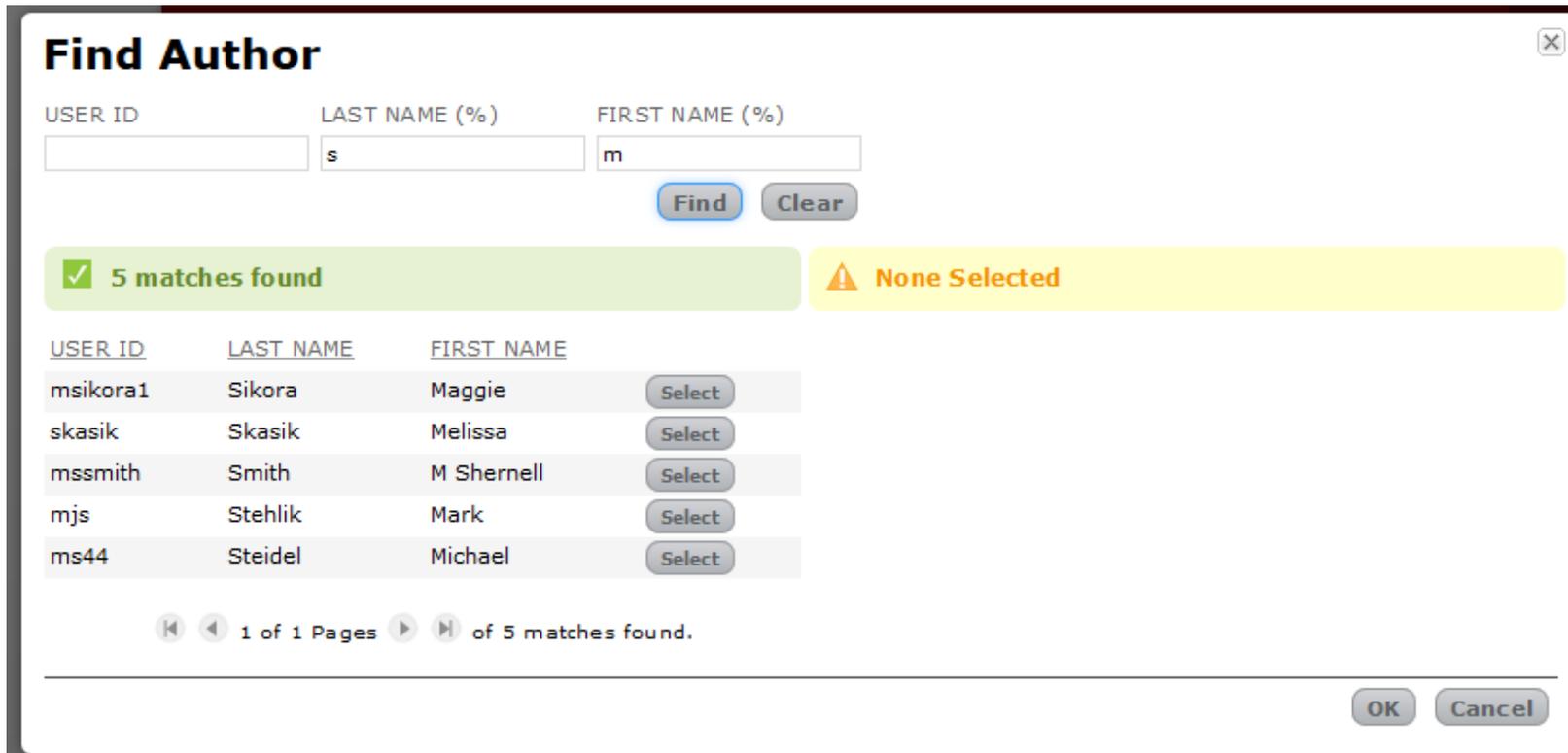
Selecting the "Clear" button clears all search criteria except for the date range.

Searches can be narrowed by selecting particular Domains, Topics or Attributes, or by selecting specific date ranges.

Results are limited to the first 200 memos (for which you are authorized to view) that match the search criteria.

# Find a Memo

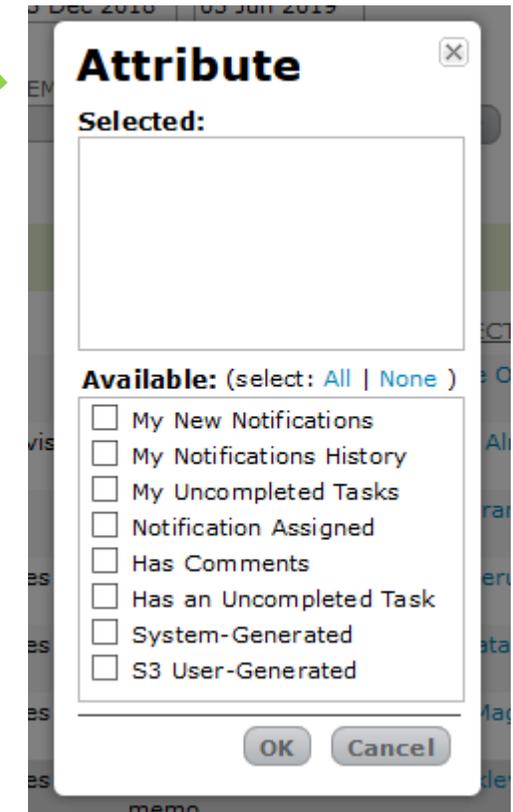
Searching by author opens the “Find Author” modal, where you can search by Andrew ID or first/last name.



The "Find Author" modal contains three search input fields: "USER ID", "LAST NAME (%)" (containing 's'), and "FIRST NAME (%)" (containing 'm'). Below the inputs are "Find" and "Clear" buttons. A green banner indicates "5 matches found" and a yellow banner indicates "None Selected". A table lists five authors with "Select" buttons for each. At the bottom, there are "OK" and "Cancel" buttons.

USER ID	LAST NAME	FIRST NAME	
msikora1	Sikora	Maggie	Select
skasik	Skasik	Melissa	Select
mssmith	Smith	M Shernell	Select
mjs	Stehlik	Mark	Select
ms44	Steidel	Michael	Select

You can also select various attributes by which to search.



The "Attribute" modal shows a "Selected:" section with an empty list. Below it, an "Available:" section lists several attributes with checkboxes, including "My New Notifications", "My Notifications History", "My Uncompleted Tasks", "Notification Assigned", "Has Comments", "Has an Uncompleted Task", "System-Generated", and "S3 User-Generated". At the bottom, there are "OK" and "Cancel" buttons.

# Find a Memo

If a search contains too many memos to search through in a timely manner, the screen will display a limited number of results, with the option to continue searching. This option will continue until the user has either searched through all available memos OR has more than 200 results to be displayed.

**Find a Memo** [Best Practices for S3 Memos](#)

⚠ **Displaying a partial list of memo matches, after searching the first 2000 of 4696 possible memos. Click Find More to search through more potential memo matches.**

SUBJECT/BODY:

DATE FROM:  DATE TO:

AUTHOR:

MEMO DOMAIN:

MEMO TOPIC:

ATTRIBUTE:

**Find More** **Find** **Clear**

✓ **80 matches found**

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PROSPECT/STUDENT	PREVIEW	P/S ATTRIBUTES
------	--------	--------	-------	---------	------------------	---------	----------------

# S3 Admin Console Homepage: Notifications/Tasks

**Carnegie Mellon** | **S3 ADMIN CONSOLE**  **Go** **Brian Hill** 20 May 2019  
Permissions | Help | Feedback | Logout

**Prospect** **Student** **Course** **Registrar** **Student Accounts** **Campus Life** **Config**

## Welcome to the S3 Admin Console!

The S3 Admin Console is Carnegie Mellon University's student information system.

- Remember to keep your passwords secure and never leave an S3 session unattended.
- Users are encouraged to use the Feedback feature to communicate with business process experts, submit inquiries regarding warnings or errors received, or suggest enhancements to the S3.
- The [Student Data and Systems Use Agreement](#), which users agree to annually, contains details regarding access to the student system and data and proper password management.

**What's New in S3?**

Release #90 includes improvements to the S3 integration with NameCoach, as well as development to further utilize anticipated transaction information for student accounts.

[» Read More](#)

**New Memo Notifications**  
[» View My Notifications](#)

**Uncompleted Memo Tasks**  
[» View My Tasks](#)

**The NameCoach Tool**  
Students have the ability to record the pronunciation and store a phonetic spelling of their names, as well as store their pronouns, in SIO. This information will be visible in the S3 Admin Console student summary header for authorized users.  
[» Learn More](#)

If you have unread Notifications and/or uncompleted Tasks, you will see links appear on your S3 homepage.\*

These links will take you to the “Find a Memo” screen under the Campus Life tab.

\*When logging into the S3 Admin Console, users who advise a large number of students may see the text “Loading” appear on the homepage in place of Notifications/Tasks for a short amount of time.

# S3 Admin Console Homepage: Notifications/Tasks

**Find a Memo** [Best Practices for S3 Memos](#) [» Back to Home](#)

SUBJECT/BODY:  DATE FROM:  DATE TO:  AUTHOR:  ?

MEMO DOMAIN:  ? MEMO TOPIC:  ? ATTRIBUTE:  ?

✓ 6 matches found

DATE	AUTHOR	DOMAIN	TOPIC	SUBJECT	PROSPECT/STUDENT	PREVIEW	P/S	ATTRIBUTES
22 May 2019	Janet Peters	Academic Record	Academic Action	t	<a href="#">Sally Johnson</a>	khbj	S	
21 May 2019	John Papinchak	Academic Record	Grades	Results Mgmt Memo	<a href="#">Sammy Smith</a>	Hello mburton1,This memo ...	S	
21 May 2019	John Papinchak	Academic Record	Grades	Results Mgmt Memo	<a href="#">Sally Johnson</a>	Hello rzhao1,This memo is...	S	
31 Jan 2019	SAO AUTO	Enr Services Student	Student Accounts	2018 1098-T	<a href="#">Sammy Smith</a>	A 1098-T was produced on ...	S	
09 Jan 2019	enprod	Enr Services Student	Student Account Refunds	Electronic Student Refund	<a href="#">Sally Johnson</a>	Electronic Refund on 2019...	S	
26 Jan 2018	SAO AUTO	Enr Services Student	Student Accounts	2017 1098-T	<a href="#">Sammy Smith</a>	A 1098-T was produced on ...	S	

Clicking on the [View My Notifications](#) link from the S3 homepage takes you to the “Find a Memo” screen, on which unread notifications will display.

# S3 Admin Console Homepage: Notifications/Tasks

**Find a Memo** [Best Practices for S3 Memos](#) [» Back to Home](#) 

SUBJECT/BODY

DATE FROM  DATE TO

AUTHOR  ?

MEMO DOMAIN  ?

MEMO TOPIC  ?

ATTRIBUTE  ?

✓ 1 match found

<u>DATE</u>	<u>AUTHOR</u>	<u>DOMAIN</u>	<u>TOPIC</u>	<u>SUBJECT</u>	<u>PROSPECT/STUDENT</u>	<u>PREVIEW</u>	<u>P/S</u>	<u>ATTRIBUTES</u>
29 May 2019	Janet Peters	University Acad Advising	Other	Adding a Memo	<a href="#">Andy Carnegie</a>	<a href="#">Here is some fancy format...</a>	S	

Clicking on the memo Preview opens the memo.

Clicking on the [View My Tasks](#) link from the S3 homepage will also take you to the “Find a Memo” screen, on which uncompleted tasks will display.

# Completing Tasks

**View Memo**  
for Andy Carnegie

Domain: University Acad Advising [Who can see this memo?](#)  
Topic: Other  
Subject: Adding a Memo

**Here is some fancy formatting**

- I love Scottie Dogs

Author: Janet Peters [Show History](#) Date: 29 May 2019 4:53 PM

Notify: Janet Peters;  
Task: Associate Dean; Stephen Pajewski;

[View Task](#) [Mark Task Complete](#)

**Comments**

[Delete](#) [Comment](#) [Edit](#) [Close](#)

**View Task**

task added

Tasked To: Associate Dean; Stephen Pajewski;

Created By: Janet Peters Created Date: 29 May 2019 4:53 PM

[Close](#)

Clicking on the “View Task” button opens the task.

You can then click the “Mark Task Complete” button once the task has been completed.

# Completing Tasks

**View Memo**  
for Andy Carnegie

Domain: University Acad Advising [Who can see this memo?](#)  
Topic: Other  
Subject: Adding a Memo

Here is some *fancy* formatting

- I love Scottie Dogs

Author: Janet Peters [Show History](#) Date: 29 May 2019 4:53 PM

Notify: Janet Peters;  
Task: Associate Dean; Stephen Pajewski;

[View Task](#) [Mark Task Incomplete](#)

**Comments**

[Comment](#)

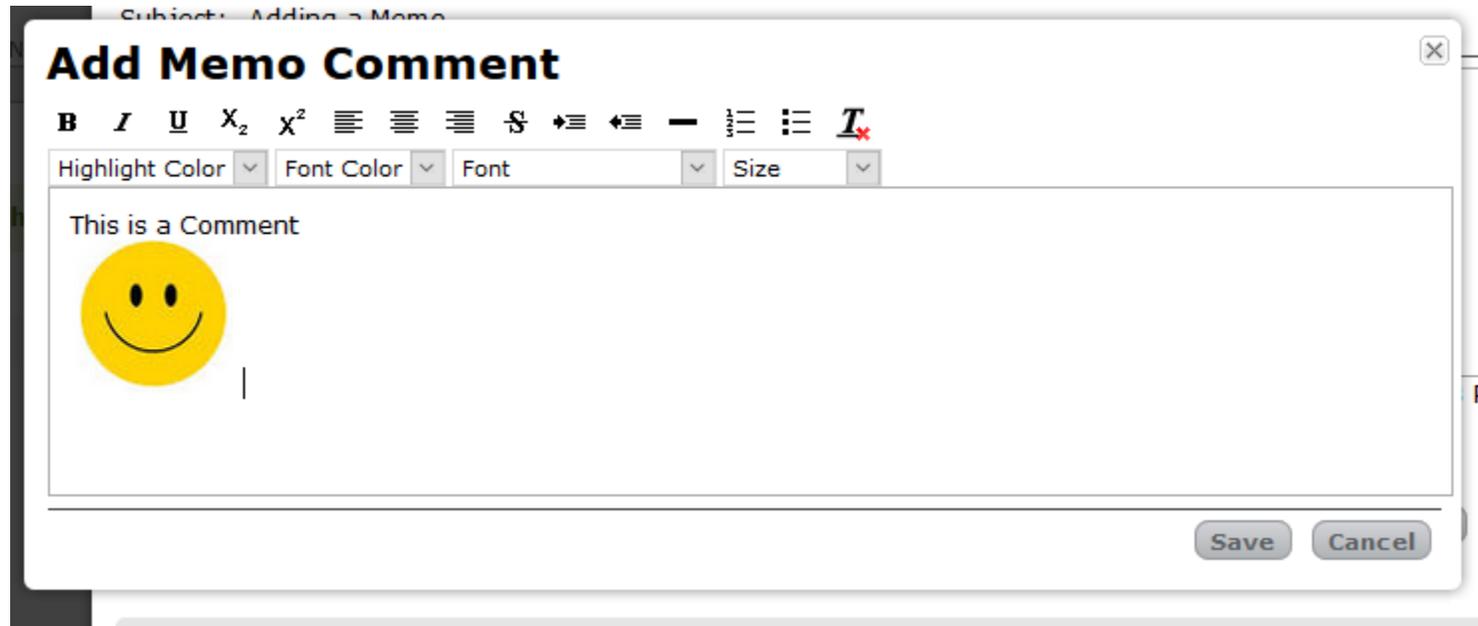
[Delete](#) [Edit](#) [Close](#)

Mellon University Build: 82.622 @ 31-May-2019 16:25:2

Once a task is complete, you'll see the "Mark Task Complete" button change to "Mark as Incomplete".

Click "View Task" to see the date and time of completion, as well as who completed the task.

# Memo Comments



Memo comments can be added, and multiple comments can be added to the same memo.

Formatting is also available for comments.

# Memo Comments

**View Memo**  
for Andy Carnegie

Domain: University Acad Advising      [Who can see this memo?](#)  
Topic: Other  
Subject: Adding a Memo

Here is some *fancy formatting*

- I love Scottie Dogs



Author: [Janet Peters](#)      [Show History](#)      Date: 29 May 2019 4:53 PM

Notify: Janet Peters;  
Task: Associate Dean; Ste      [New Task](#)      [Mark Task Incomplete](#)

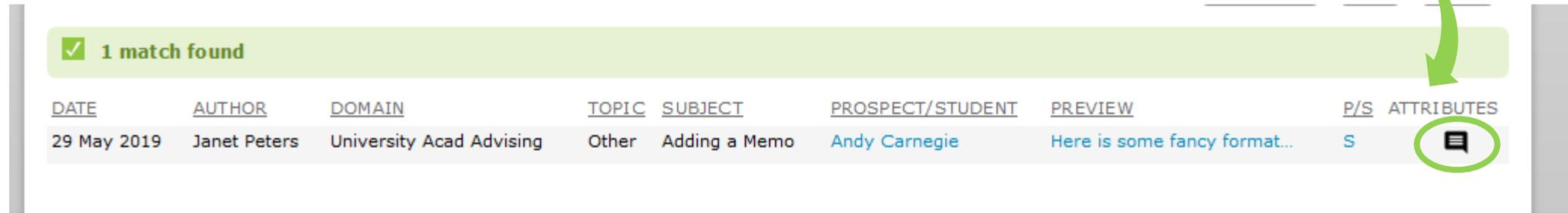
DATE	AUTHOR	PREVIEW
03 Jun 2019 4:46 PM	<a href="#">Stephen Pajewski</a>	This is a Comment

[Delete](#)      [Comment](#)      [Edit](#)      [Close](#)

Previews of the comments do not include any formatting or images.

# Memo Comments

Once a comment has been added, an icon indicating that there are comments on the memo appears in the Attributes column.



The screenshot shows a search results interface. At the top, a green bar indicates '1 match found'. Below this is a table with columns: DATE, AUTHOR, DOMAIN, TOPIC, SUBJECT, PROSPECT/STUDENT, PREVIEW, P/S, and ATTRIBUTES. A green arrow points from the text above to a comment icon (a speech bubble) in the ATTRIBUTES column of the first row.

<u>DATE</u>	<u>AUTHOR</u>	<u>DOMAIN</u>	<u>TOPIC</u>	<u>SUBJECT</u>	<u>PROSPECT/STUDENT</u>	<u>PREVIEW</u>	<u>P/S</u>	<u>ATTRIBUTES</u>
29 May 2019	Janet Peters	University Acad Advising	Other	Adding a Memo	<a href="#">Andy Carnegie</a>	Here is some fancy format...	S	

# Other Features

**View Memo**  
for Andy Carnegie

Domain: Enr Services Student [Who can see this memo?](#)  
Topic: Enrollment Condition  
Subject: ENR STAT CH

Authorized by: Jamie Brandon (jbrandon)

Author: [Jamie Brandon](#) [Show History](#) Date: 06 Aug 2018 9:05 AM

Notify:  
Task:

**Comments**

[Delete](#) [Comment](#) [Edit](#) [Close](#)

**Memo History**

DATE	USER	ACTION
29 May 2019 4:53 PM	<a href="#">Janet Peters</a>	Created
30 May 2019 10:57 AM	<a href="#">Amy Yearwood</a>	Read
03 Jun 2019 4:04 PM	<a href="#">Janet Peters</a>	Read
03 Jun 2019 4:26 PM	<a href="#">Janet Peters</a>	Read
03 Jun 2019 4:26 PM	<a href="#">Janet Peters</a>	Read
03 Jun 2019 4:27 PM	<a href="#">Janet Peters</a>	Edited
03 Jun 2019 4:28 PM	<a href="#">Stephen Pajewski</a>	Read
03 Jun 2019 4:46 PM	<a href="#">Stephen Pajewski</a>	Commented
03 Jun 2019 4:50 PM	<a href="#">Stephen Pajewski</a>	Read

[Close](#)

Clicking the [Show History](#) link in a memo displays a modal that shows when a memo was created, read, and edited.

**Find a Memo** [Best Practices for S3 Memos](#)

The Best Practices for S3 Memos link opens a [PDF document](#) with tips about what kind of content should and should not be included in S3 Memos, as well as in [Stellic Notes](#).

Thank you for your support of the Student Services Suite (S3) and for using S3 Memos. For additional questions or comments, use the Feedback link, which can be found in the top right corner of your S3 Admin Console homepage.



Be sure to stay tuned to the [S3 Updates webpage](#) for release summaries, user documentation, training sessions, and more.



Follow [@CarnegieMellonS3](#) on Facebook and Instagram, or [@S3CMU](#) on Twitter, for news and updates!