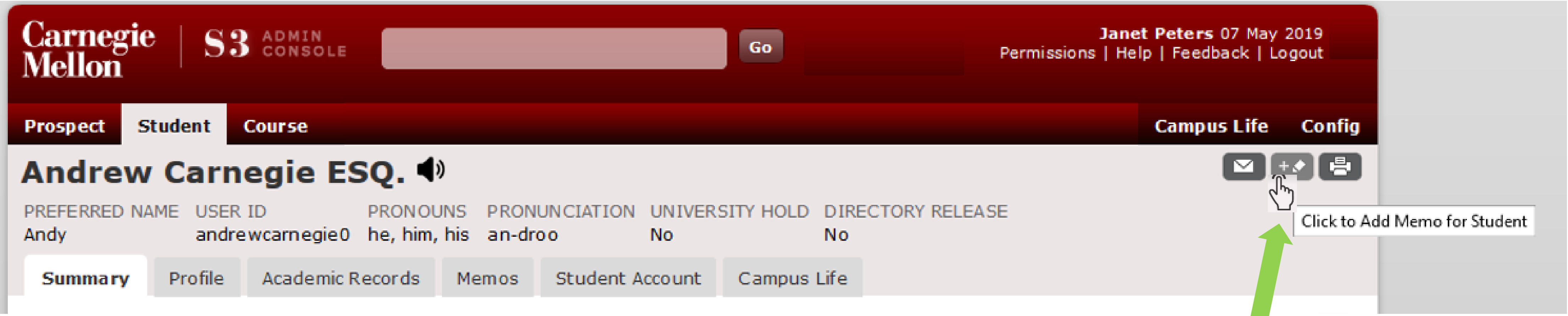
S3 Memos User Guide

Carnegie Mellon University
Enrollment Services

Updated November 5, 2019

Writing a Memo

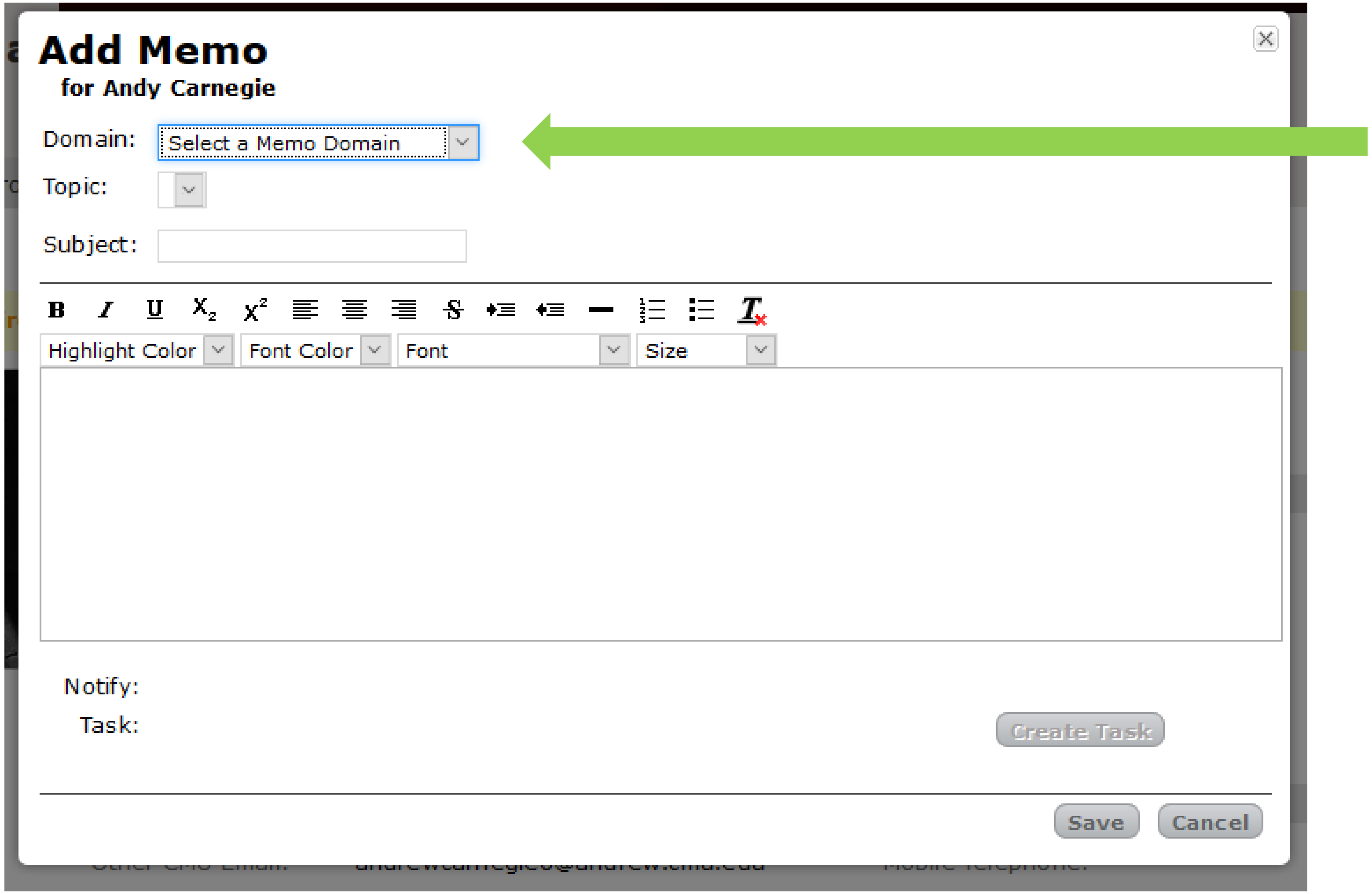


To write a memo, you must go to the student's S3 page.

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.

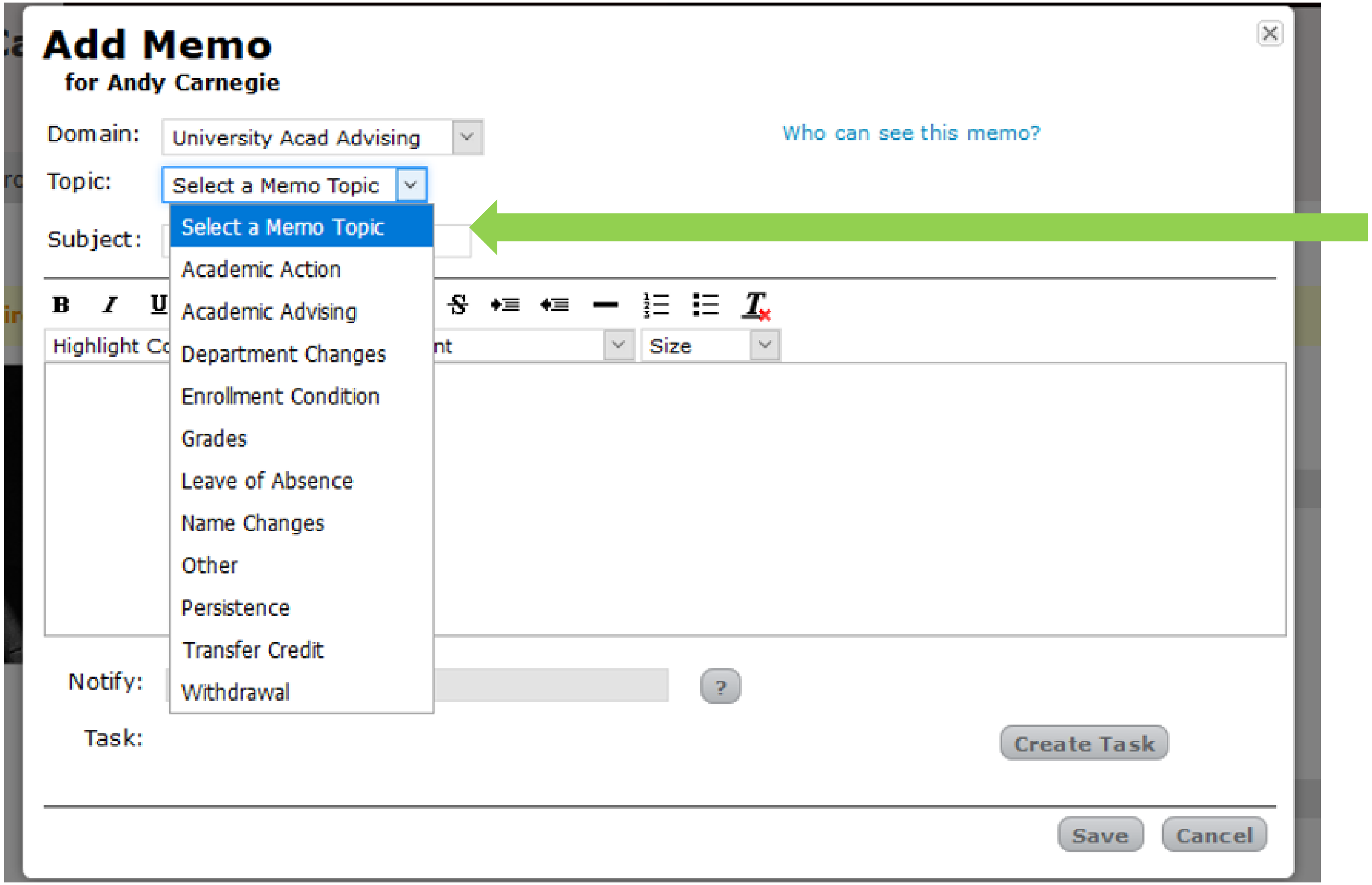
Writing a Memo

Add Memo Modal



You must select a Memo Domain from the "Domain" dropdown list.

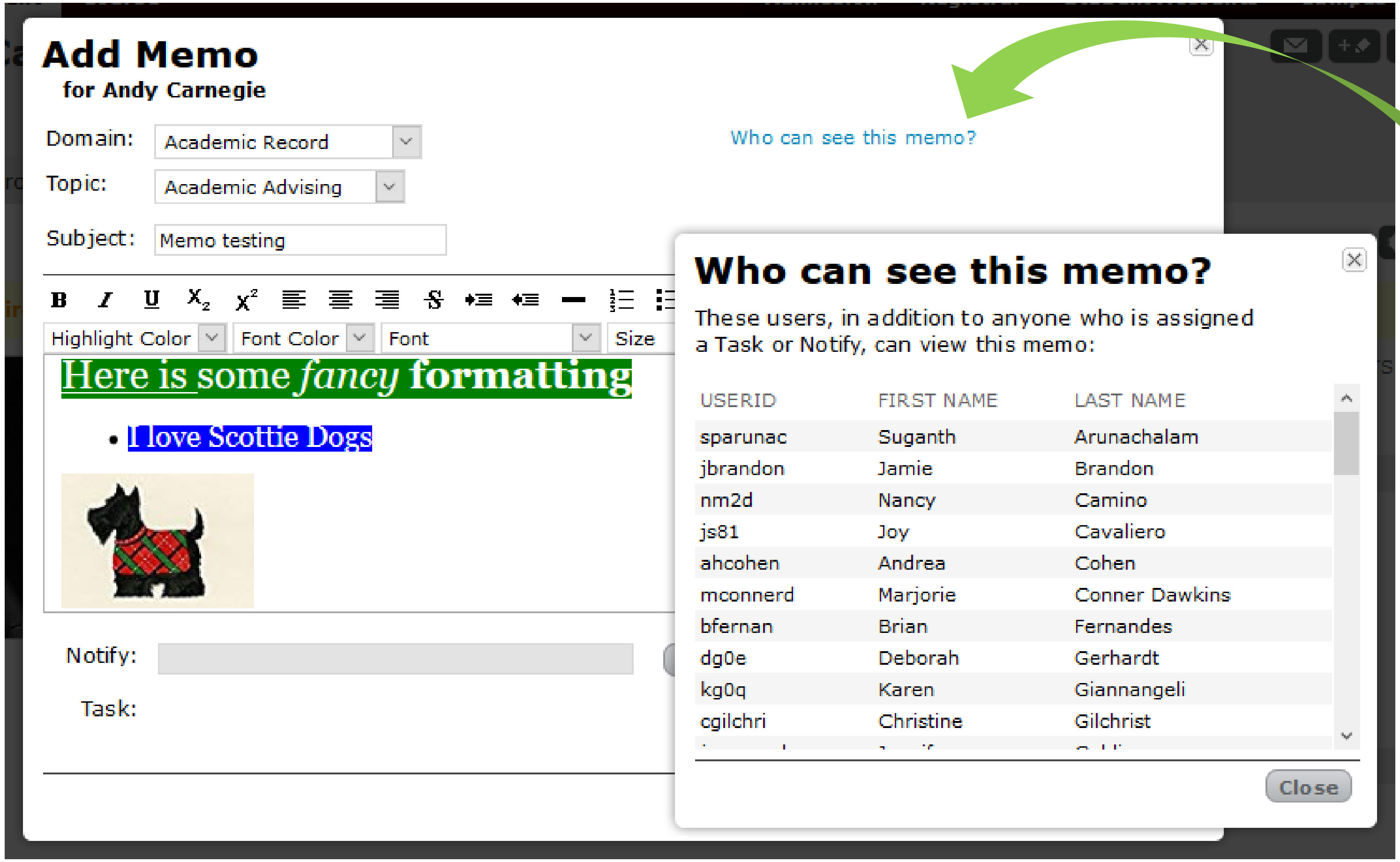
Writing a Memo



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

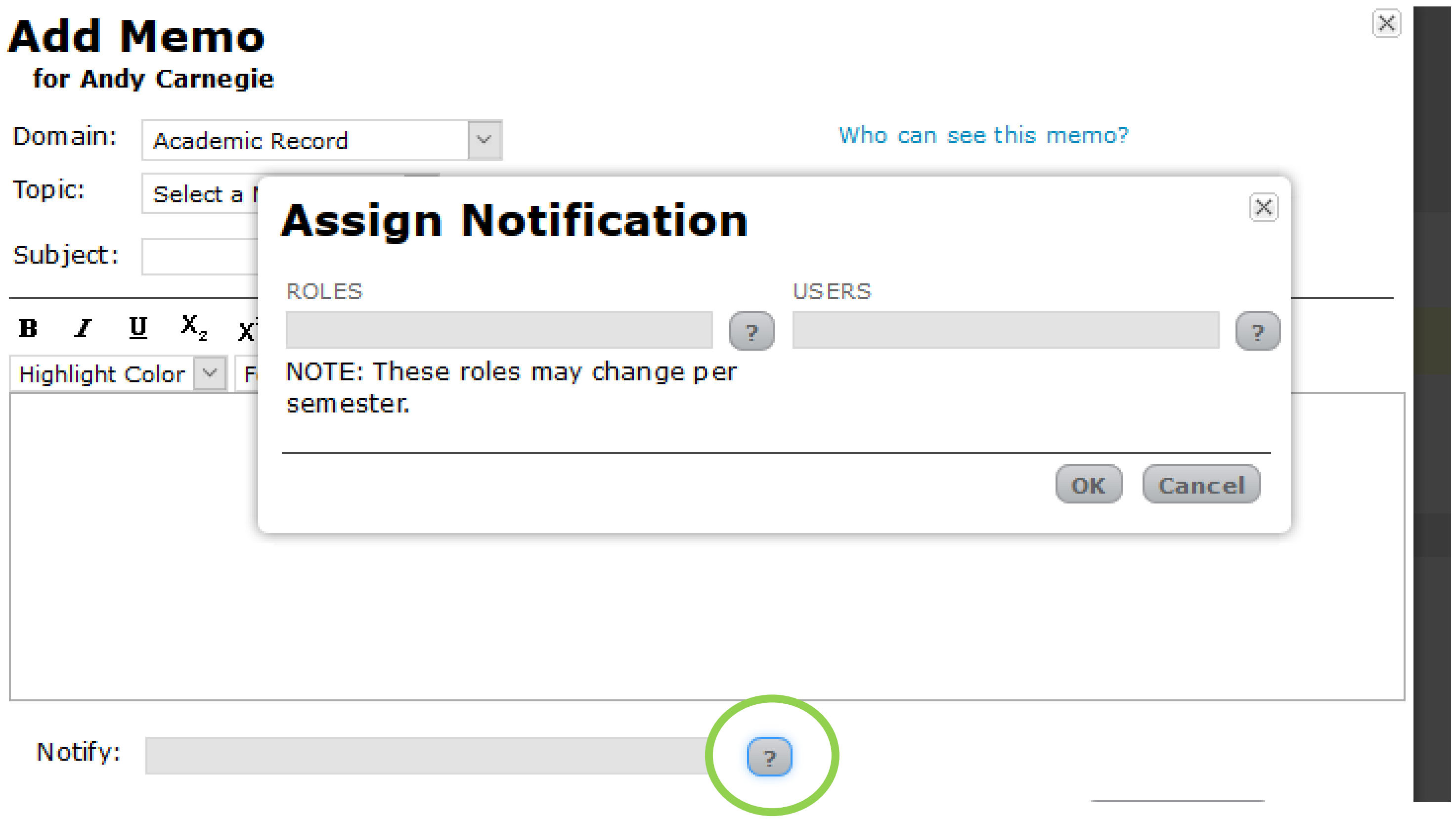


Formatting is available on memos, including copying and pasting images into the body.

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

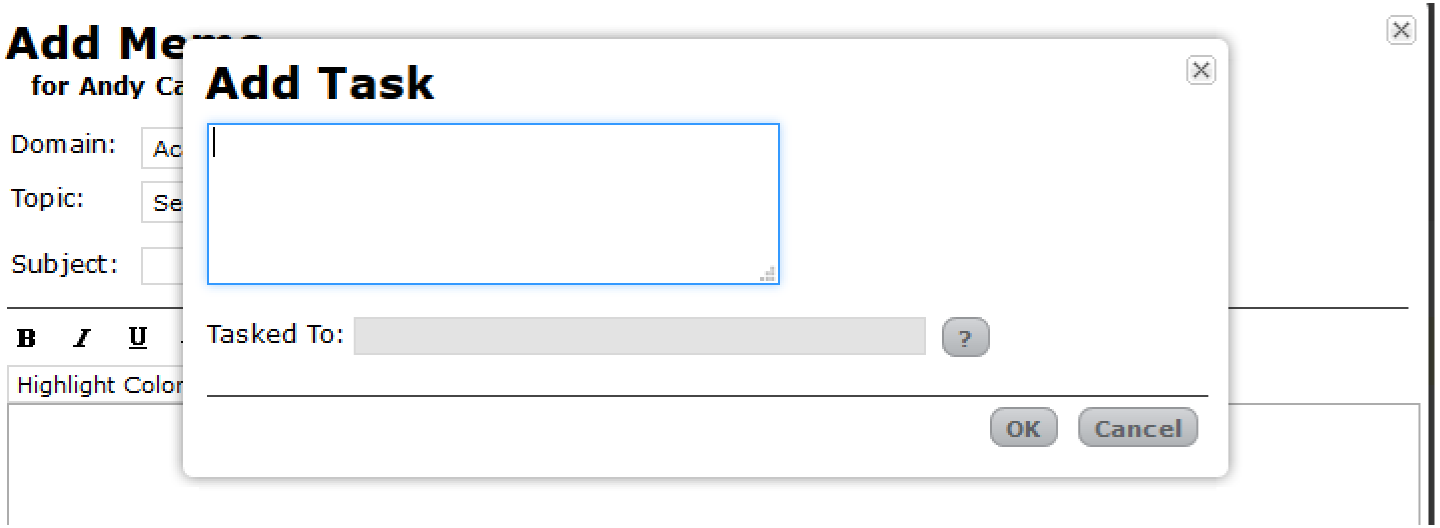


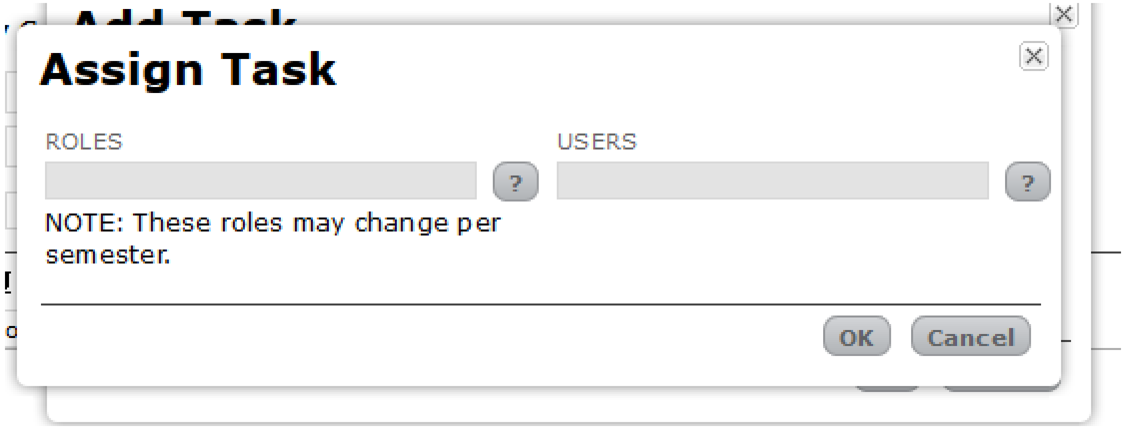
Click on the question mark next to the "Notify" box, and an "Assign Notification" modal will appear.

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.

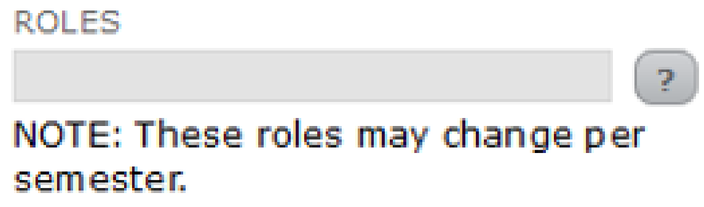
Writing a Memo

Assigning Tasks & Notifications

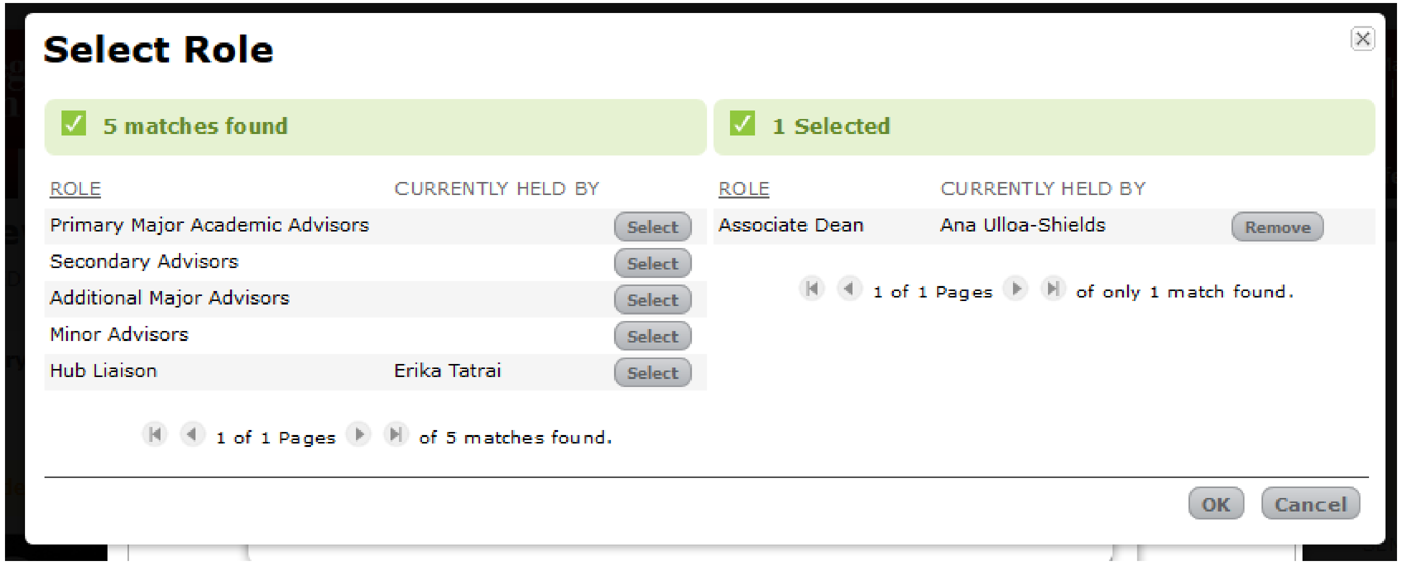
- You can assign Notifications and Tasks in two different ways: By selecting a **specific user**, or by selecting the **role**.
- The difference between the two is that the selection of a specific user means that if that individual changes jobs, or leaves the university, the assignment remains with them.
- 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



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

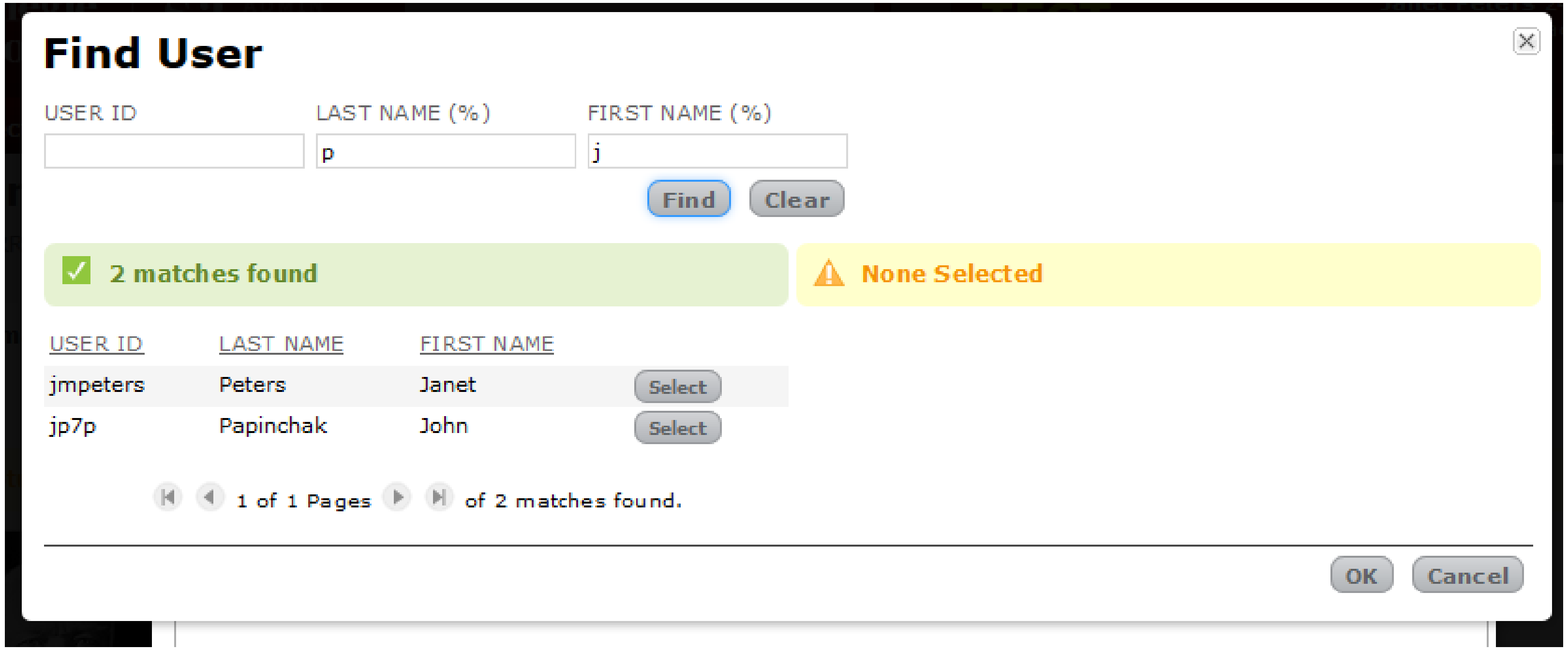


To select a Role, click the “Select” button. Once selected, the Role will move from the left side of the screen over to the right. If you change your mind, you can click “Remove” and the Role will move back over to the left. “Currently Held By” does not need to contain a name in order for the Role to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

Writing a Memo

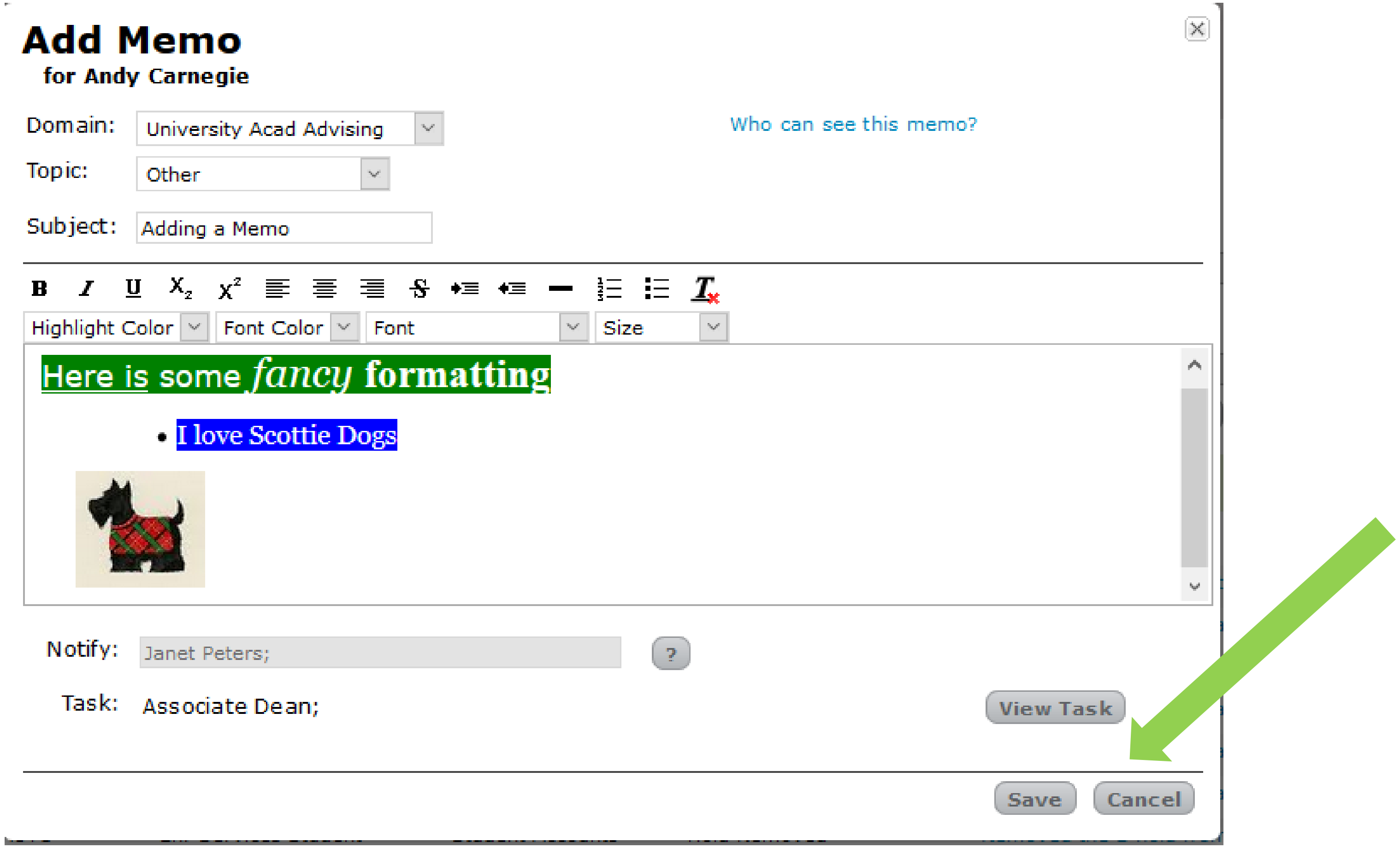
New Finder Screen for Selecting Individuals

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



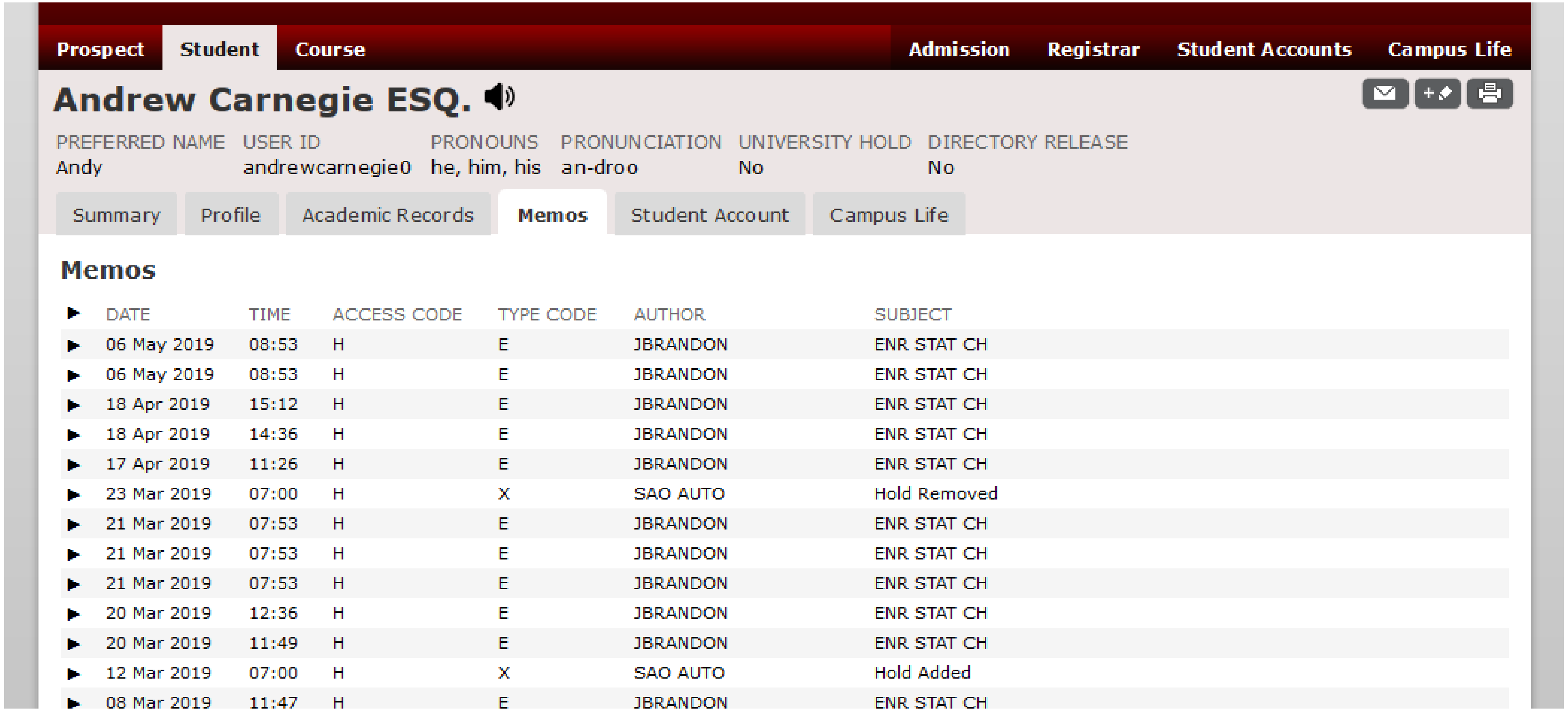
You can search for a User by Andrew ID, First and/or Last name. The results will populate below the search criteria. To select a User, click the “Select” button. Once selected, that User will move from the left side of the screen over to the right. If you change your mind, you can click “Remove” and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

Writing a Memo



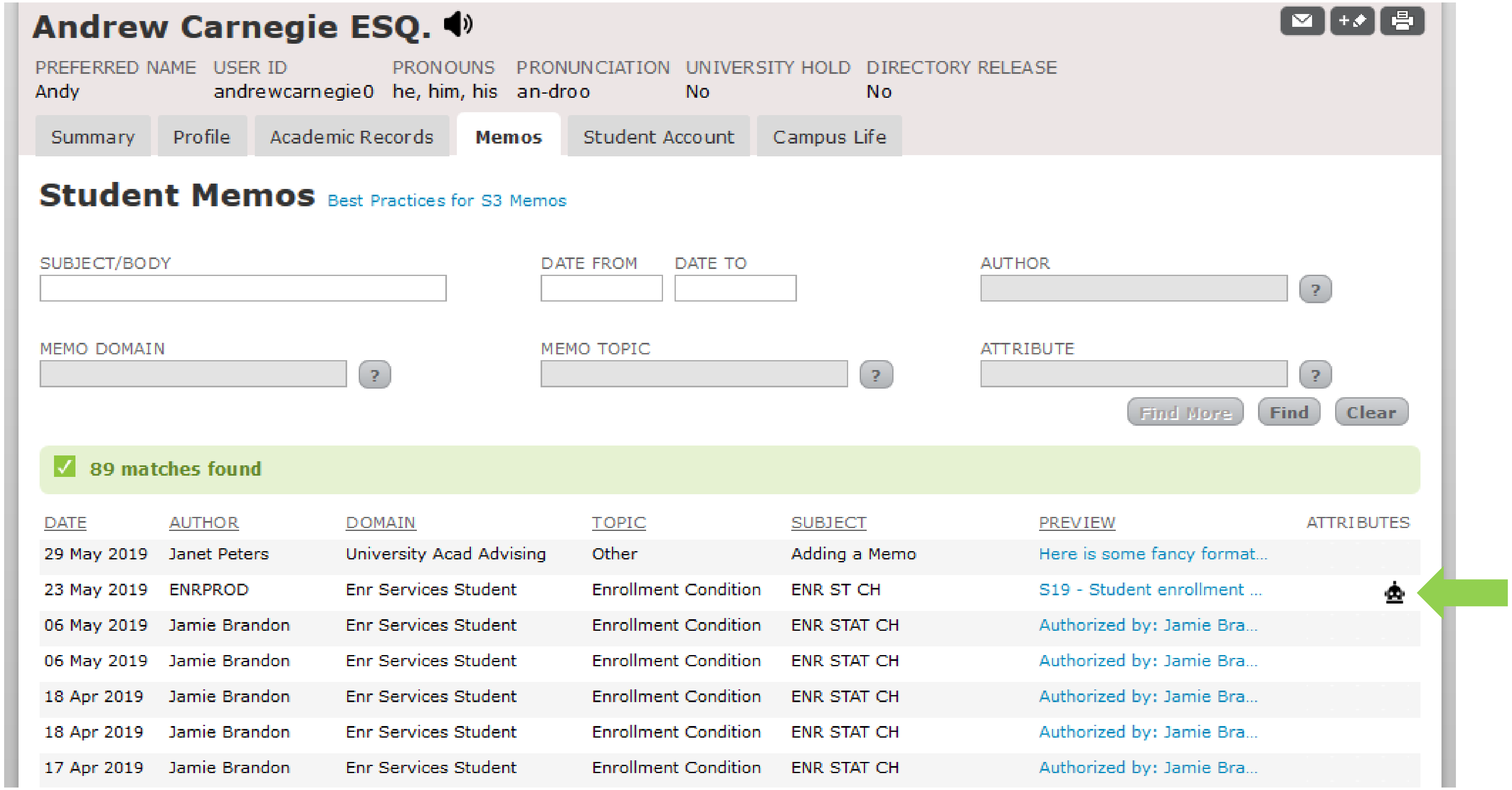
When your Memo is ready, select the “Save” button at the bottom of the modal.

Old Memo Screen



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

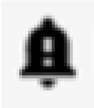


Things to note:

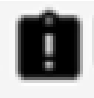
- You can now search for a specific memo on a student's memo page.
- The screen displays a Preview of the memo: Text only, with no formatting (including images)
- Clicking on the blue Preview opens the memo for viewing.
- There are Attributes associated with memos, signified by icons displayed next to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

Attribute Icons

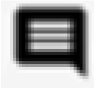
Each icon has text that appears when you hover over it.



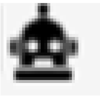
There is information in this memo that you have not read and you are in the notification list.



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

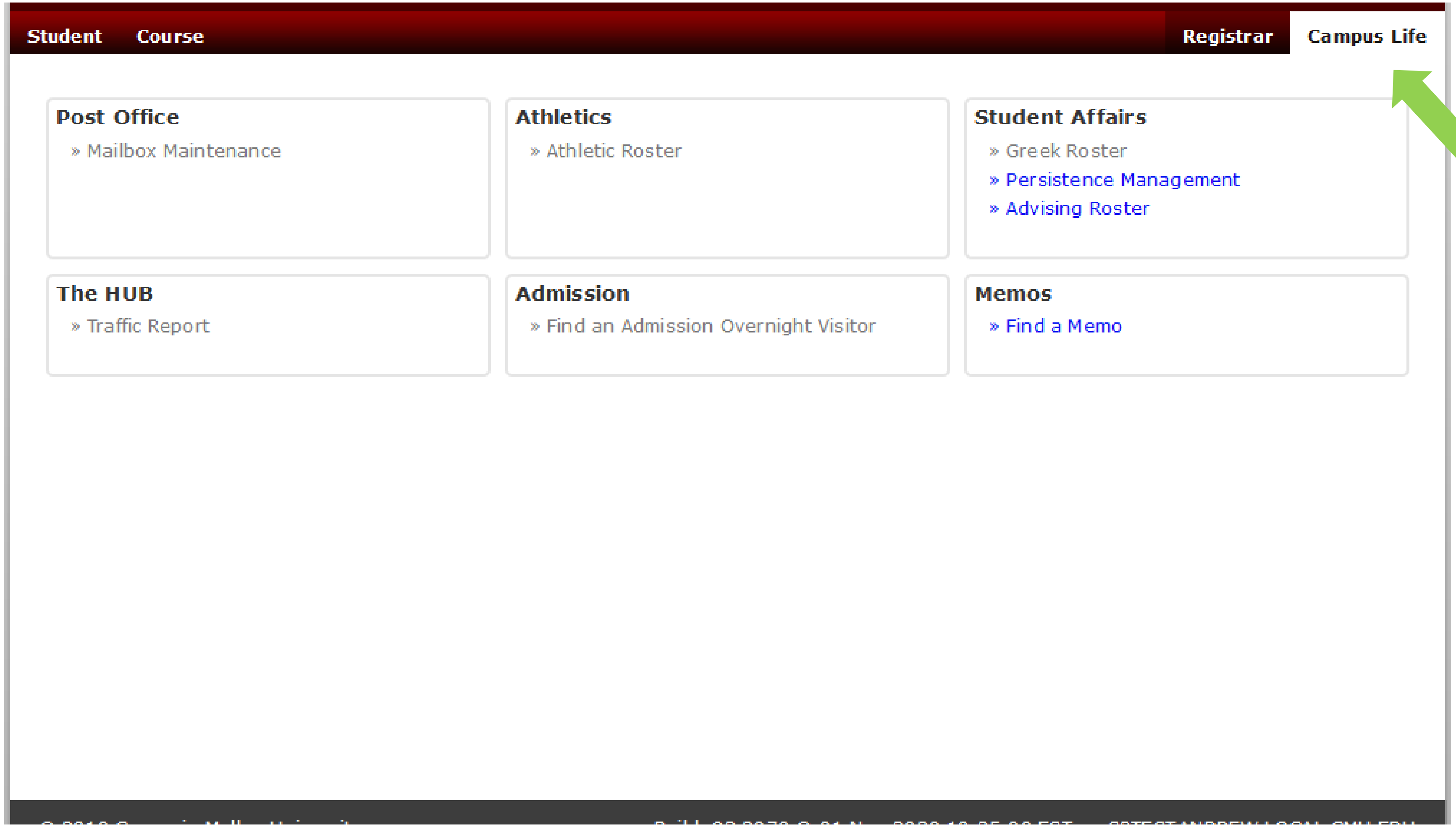


This memo has comments.



This memo was generated by the S3 system.

Find a Memo

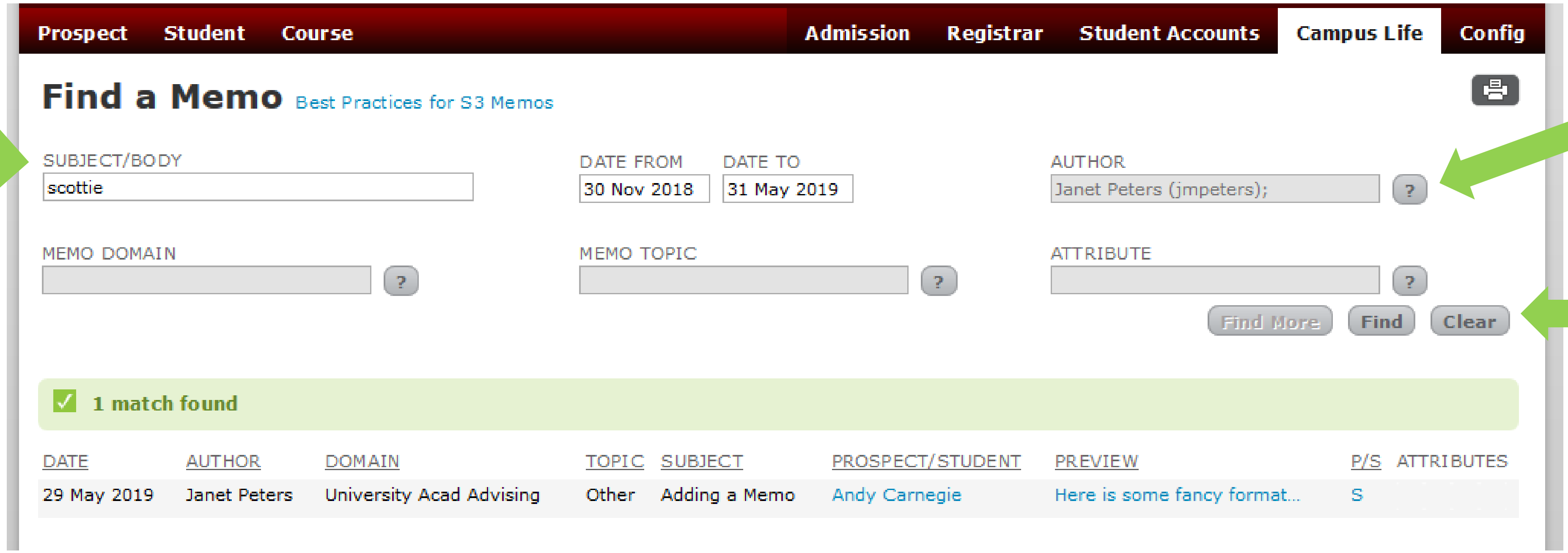


To find a memo, go to the Campus Life tab.

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).



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

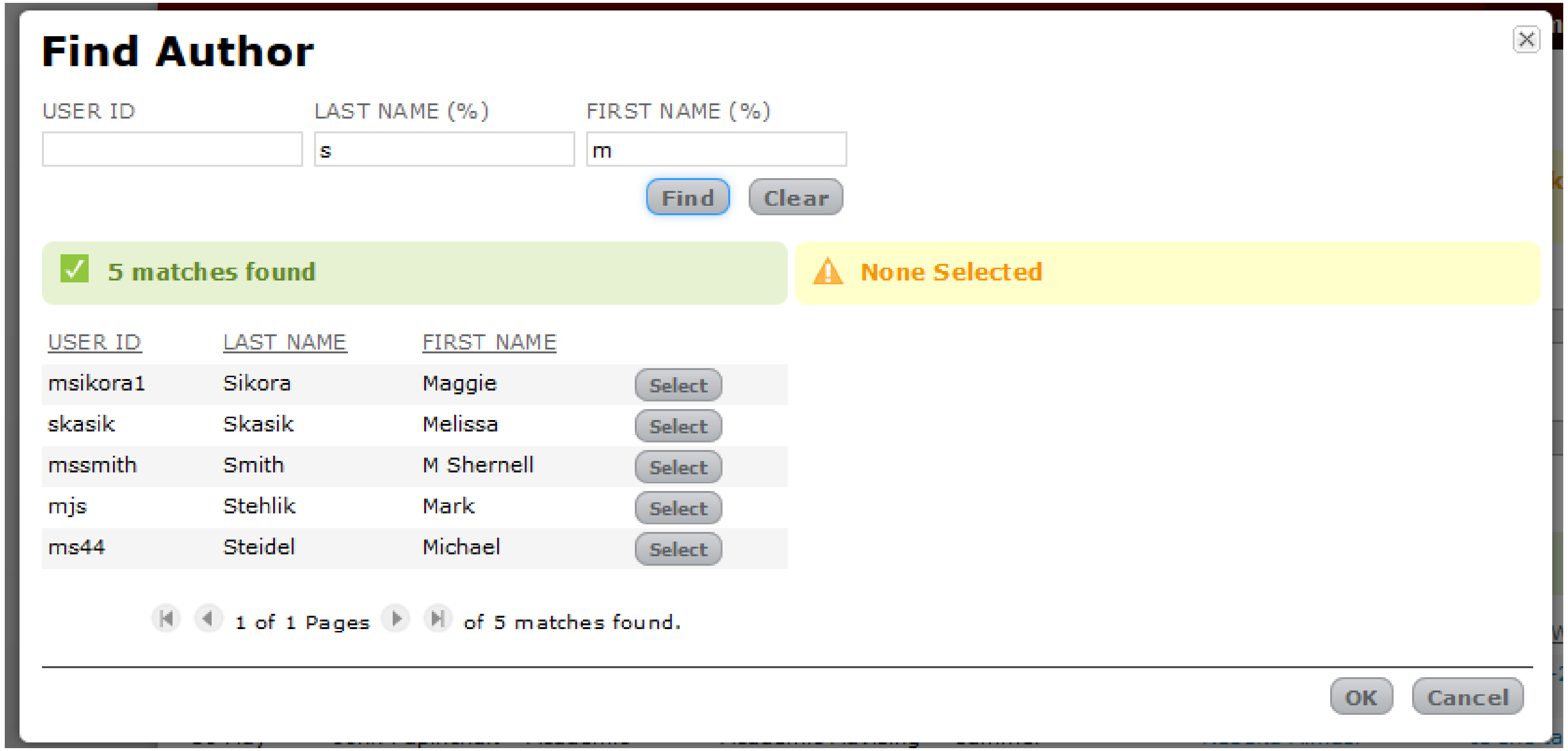
Selecting the “Clear” button clears all search criteria except for the date range.

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

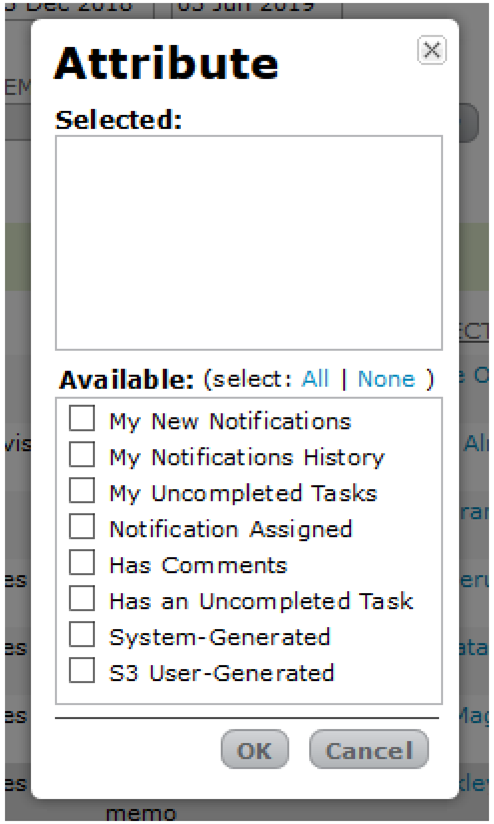
Results are limited to the first 200 memos (for which you are authorized to view) that match the search criteria.

Find a Memo

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

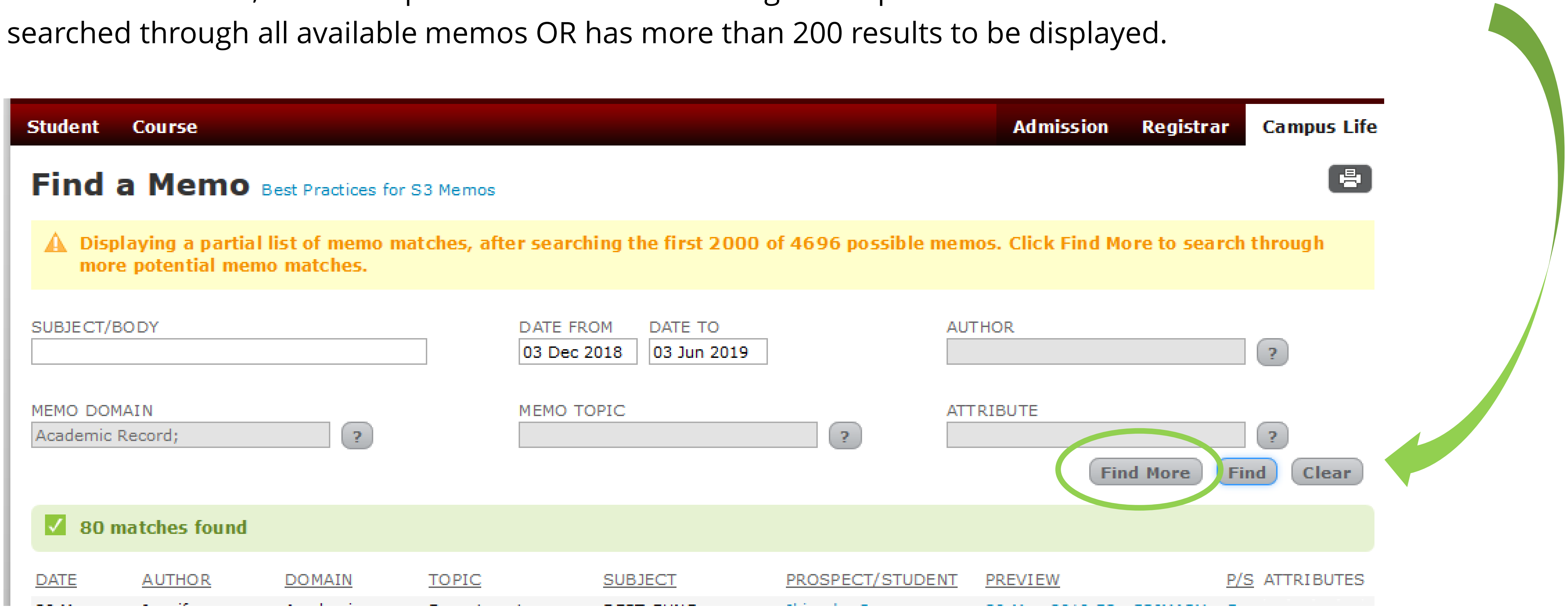


You can also select various attributes by which to search.

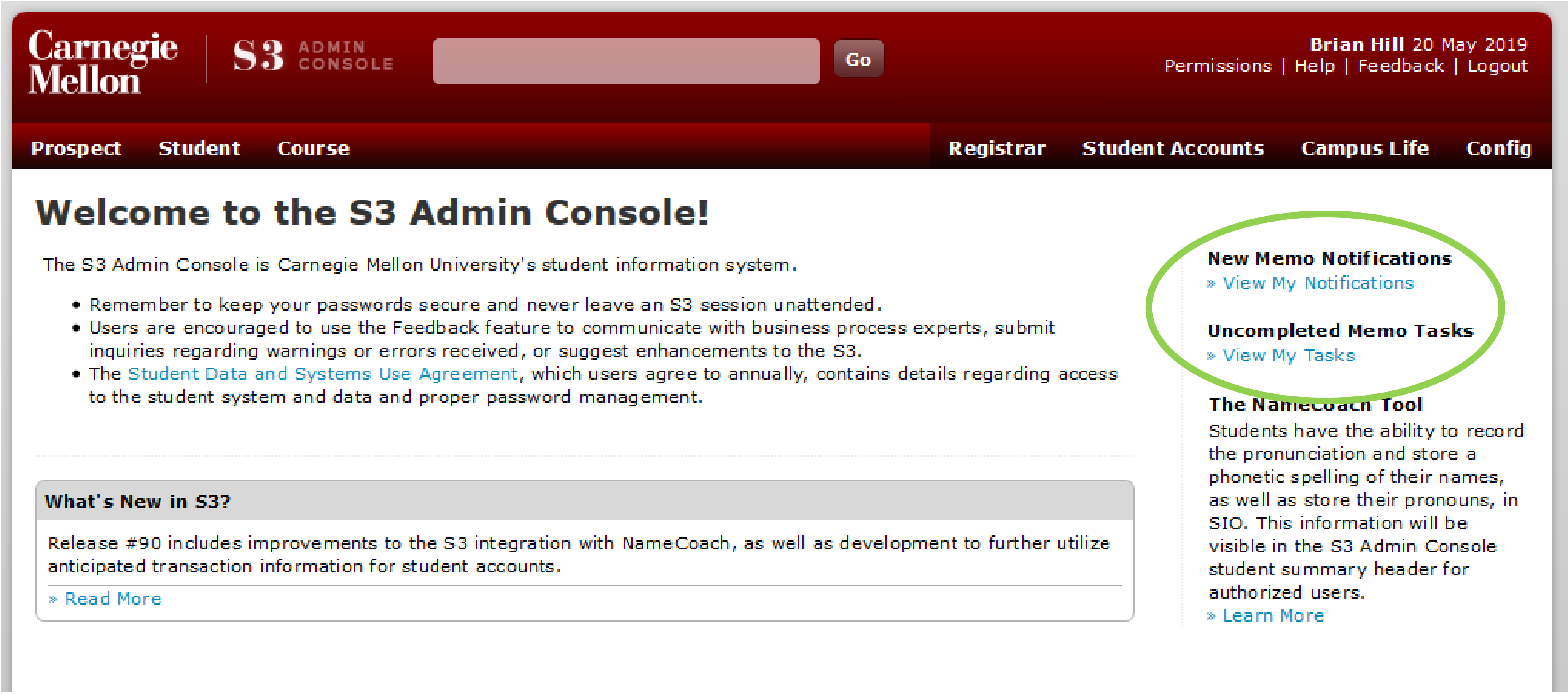


Find a Memo

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.



S3 Admin Console Homepage: Notifications/Tasks

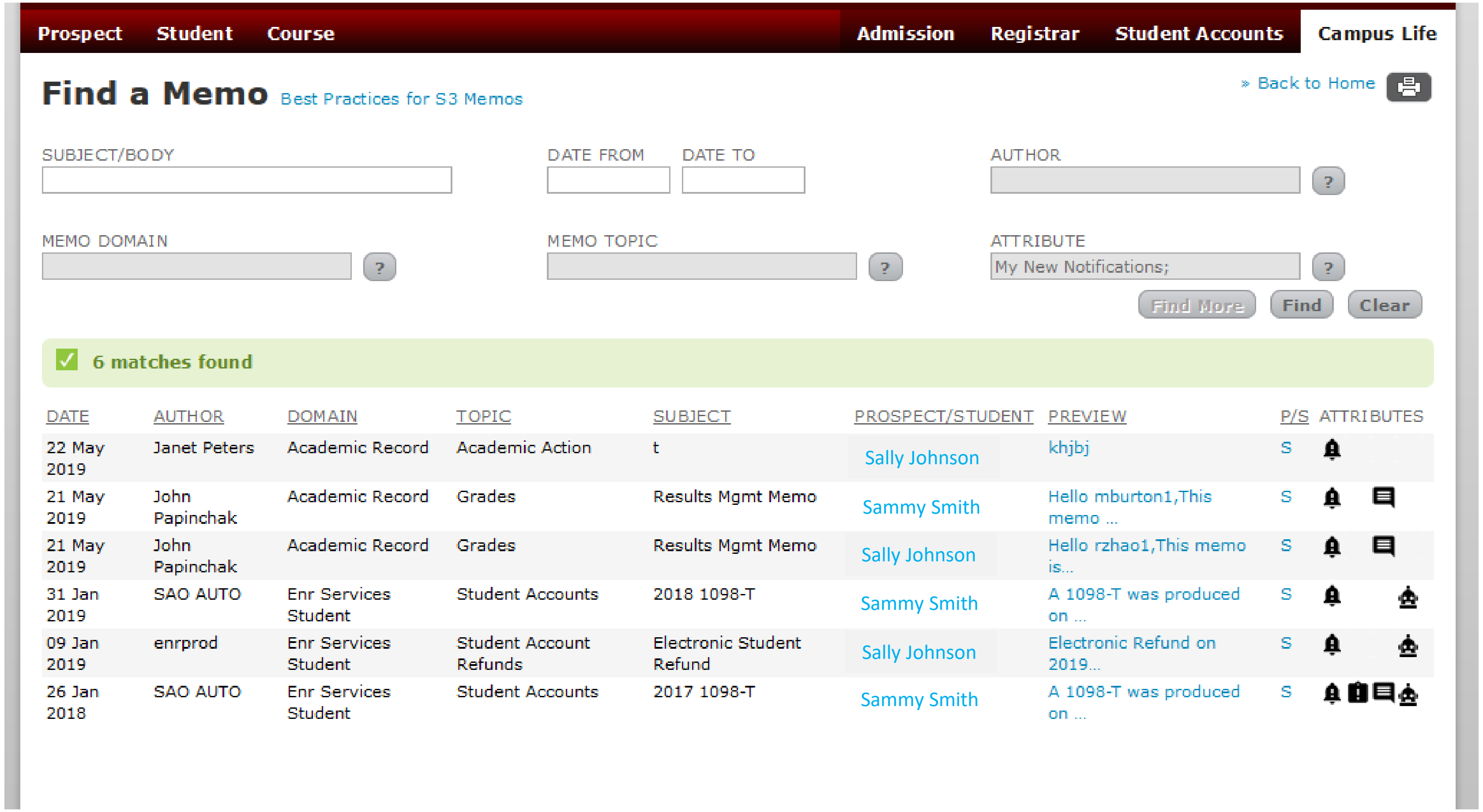


If you have unread Notifications and/or uncompleted Tasks, you will see links appear on your S3 homepage.*

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

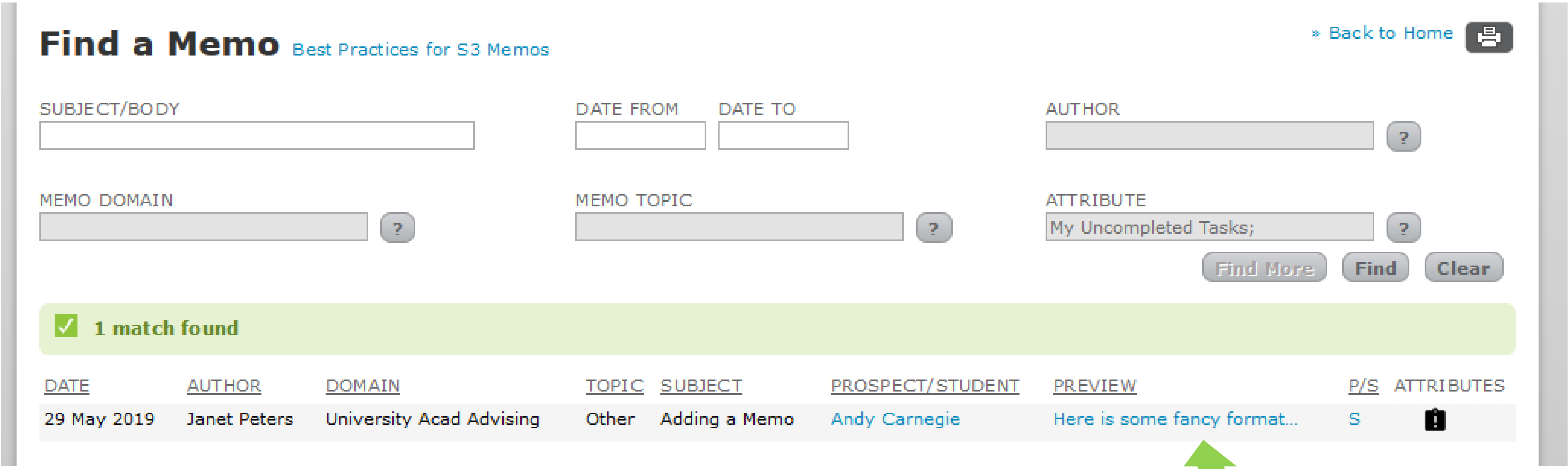
*When logging into the S3 Admin Console, users who advise a large number of students may see the text “Loading” appear on the homepage in place of Notifications/Tasks for a short amount of time.

S3 Admin Console Homepage: Notifications/Tasks



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.

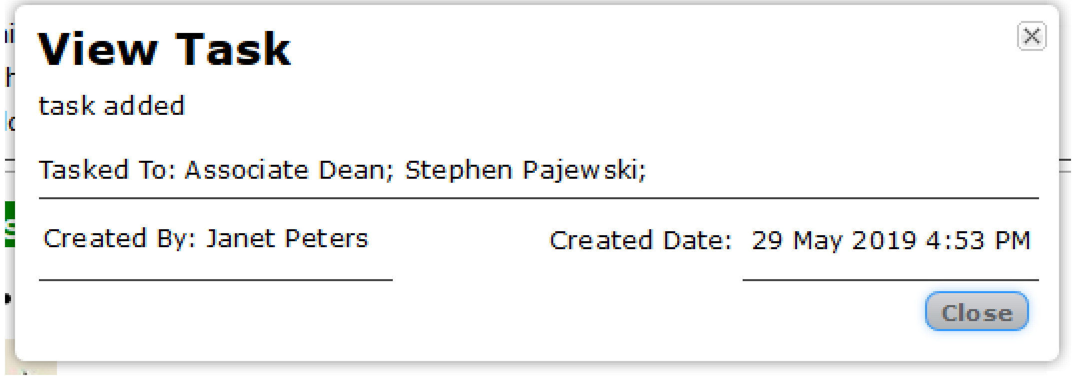
S3 Admin Console Homepage: Notifications/Tasks



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.

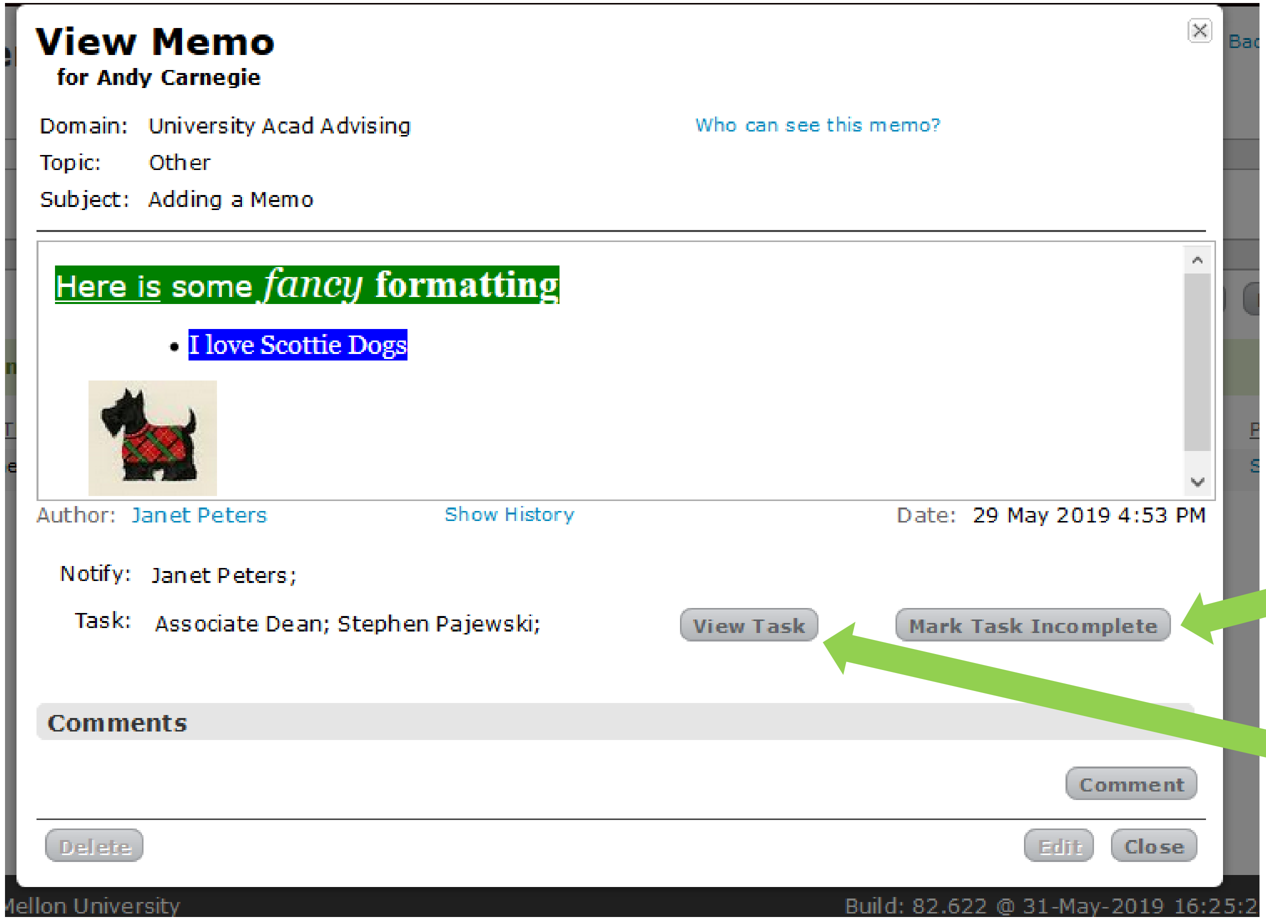
Completing Tasks



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

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

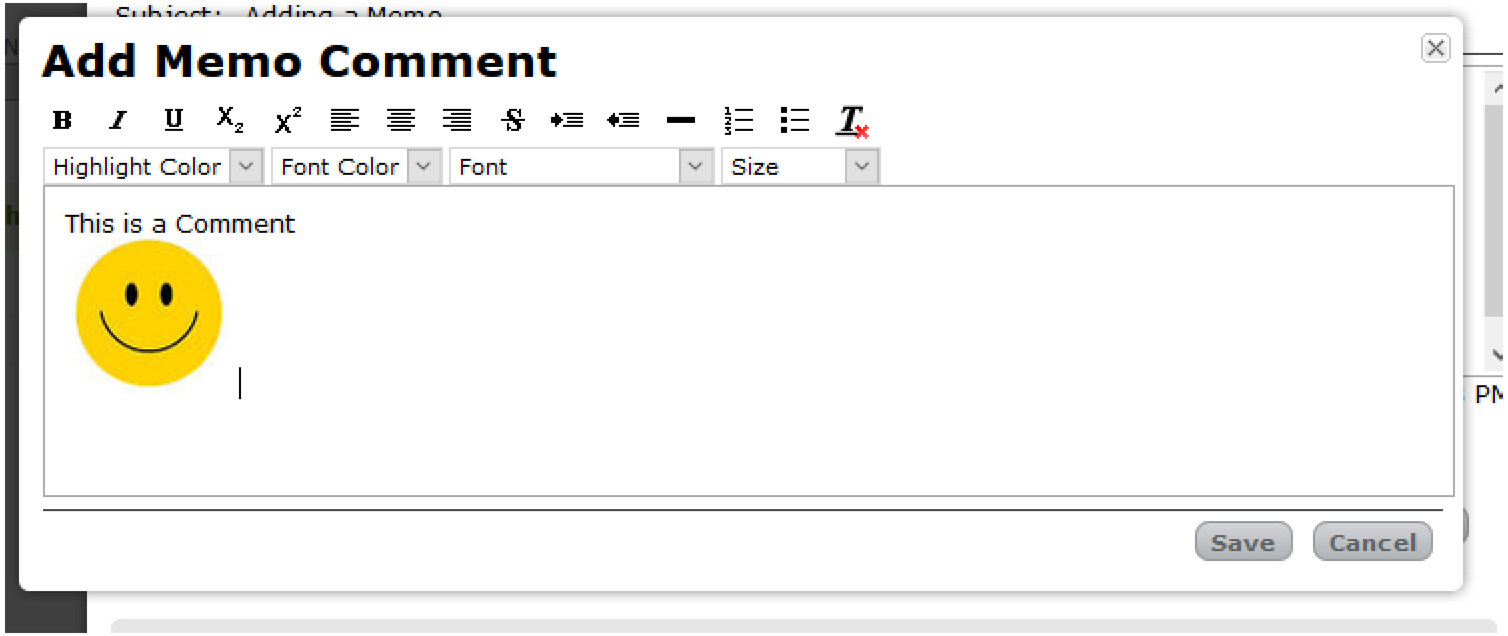
Completing Tasks



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.

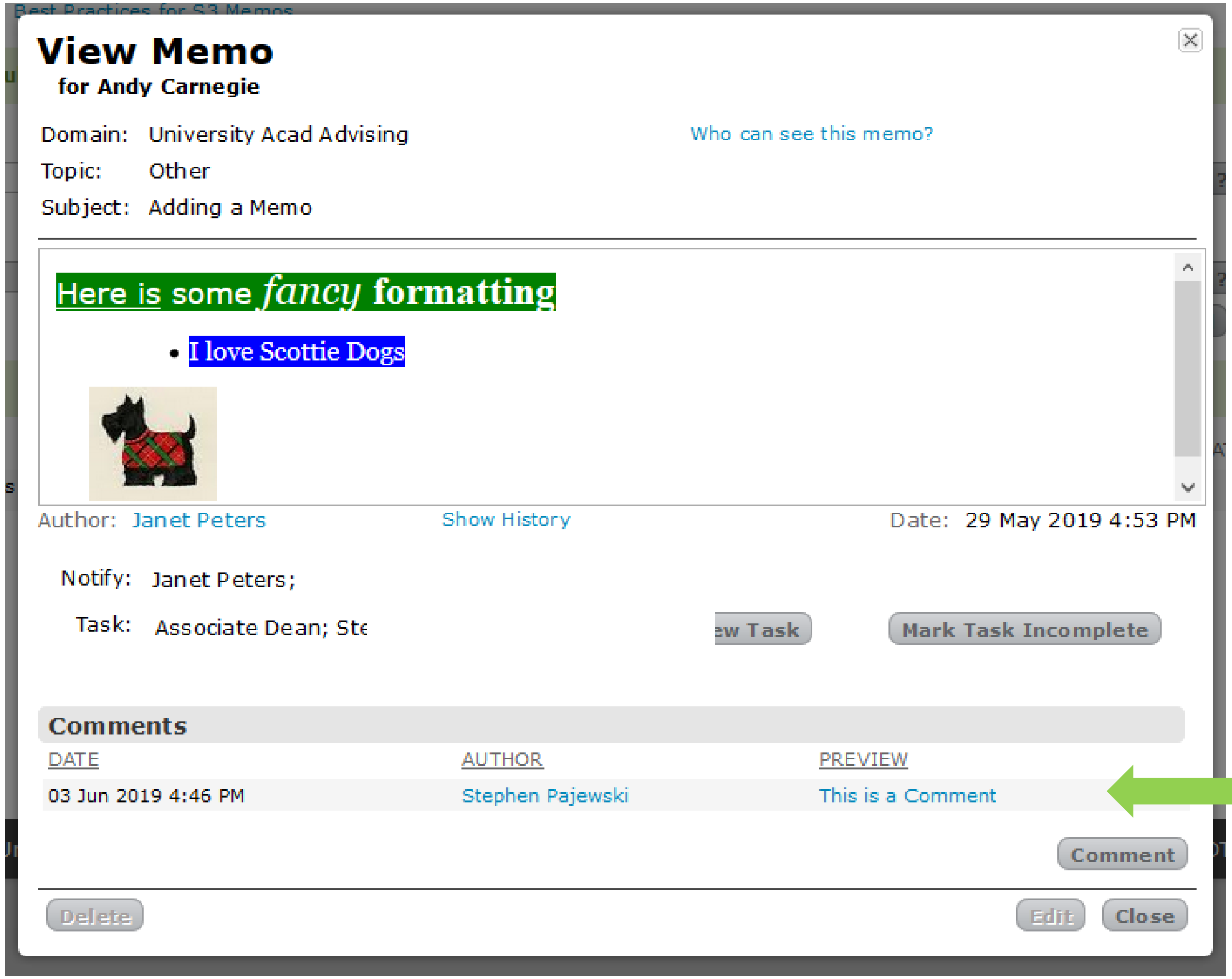
Memo Comments



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

Formatting is also available for comments.

Memo Comments



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

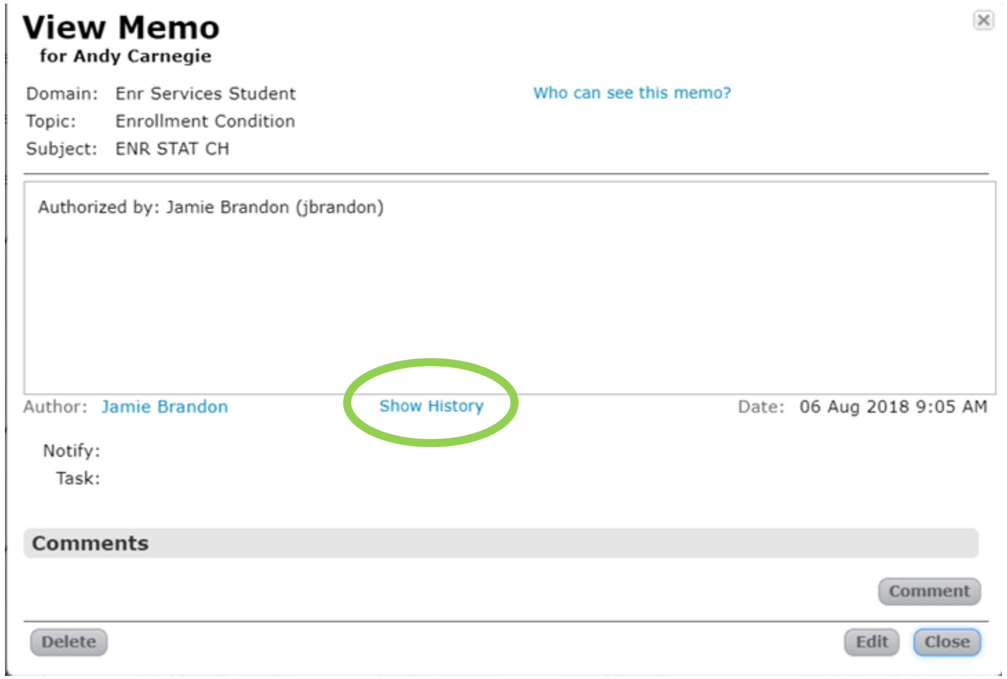
Memo Comments

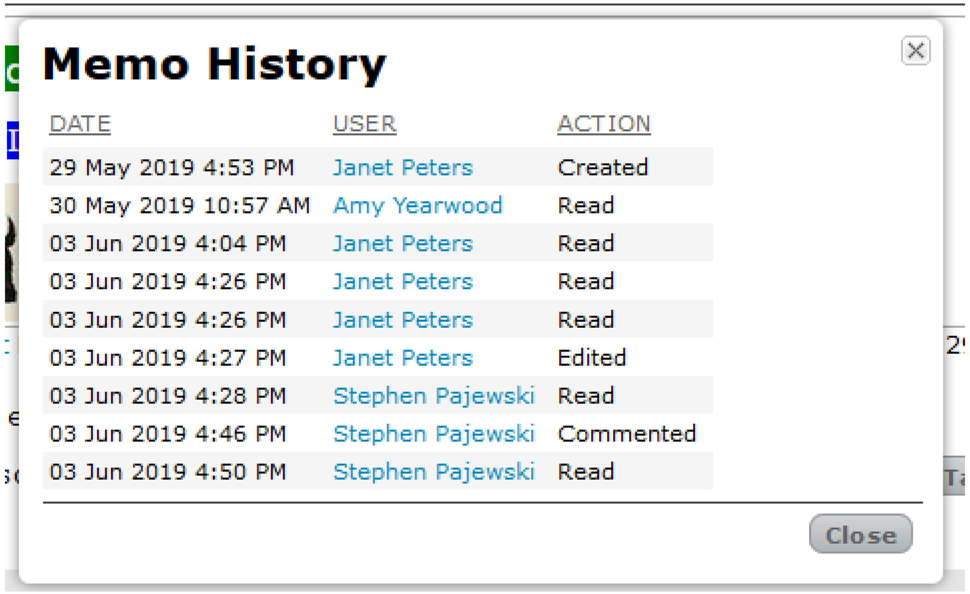
Once a comment has been added, an icon indicating that there are comments on the memo appears in the Attributes column.

1 match found

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	

Other Features





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

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!