**Academic Advising**

**Creation and Maintenance of AdRx Profiles**

## Overview

### Access

AdRx requires at least CAS authentication. Most AdRx functionality requires the use of a Duo token, but some roles will be created that will have access to limited views without Duo.

Currently you may access Advising Records by going to:

- One.IU and selecting the **Advising Records (AdRx)** task
- http://adrx.iu.edu

The exec group establishes profiles for campus or local administrators and administrative groups, and manages ADS. The administrators manage profiles.

Administrators must have an administrative profile to have access to User Profile Maintenance.

All users, including Administrators, must have a User Profile to access Advising Records. An Administrative profile will be able to manage all profiles in the associated group. A user may have multiple administrator roles to manage multiple groups (a different group associated with each administrative profile).

### Summary of AdRx Administrative process for Profiles

- All users have a profile, which includes a role; key roles must also be in ADS groups (exec, admin, advisor, staff, CAS only);

- All roles have specific features (information/functionality on pages) associated with them; exec group turns features on or off by role (almost all are on for Administrator/Supervisor/Advisor/faculty advisor);

- Administrators may turn off features for their group, or give members of their group the option to use/not use a feature;

- Features may have settings. Settings allow advisors/users to setup certain functionality as appropriate to them individually; this is done in My Current Profile in AdRx;

- The exec group establishes profiles for campus or local administrators, administrative groups, and manages ADS. Administrators must acknowledge that certain roles are specifically appropriate to certain staff;

- Administrators create and manage the profiles of staff in their groups.
Possible roles upon which a profile might be based:

- Academic Advisor
- Faculty Advisor
- Peer Advisor Y (with SIS)
- Peer Advisor N (no SIS)
- Faculty Mentor
- Student Mentor
- Advising Supervisor
- Faculty
- Peer Educator (Financial Literacy group)
- AdRx Exec
- Administrator Y
- Staff Y (Recorder) (Support Staff in unit)
- Limited Staff N
- Tutor
- Athletics
- Dean of Students
- Residence Halls
- Career Services
- Academic Support (Math Centers, Writing Centers, etc.)

We can create roles as appropriate for IU business practices. Roles should be as consistent as possible across campuses and across the system.

Definitions of Key Roles

**Academic Advisor, Faculty Advisor** (ADS: SY-UITS-ADRX-ACADV)
An Academic Advisor regularly engages in a collaborative relationship with multiple individual students, with the intent being to educate the student about the development of academic goals that are consistent with personal interests, values and abilities. Academic advisors are empowered by their schools/units to educate students about their degree requirements, completion planning, and to interpret/implement relevant policies and procedures. Although many individuals on campus, including academic advisors, may assist the student in making decisions and accomplishing goals, the academic advisor represents the department/institution in confirming the student’s academic program and assisting the student in progress to completion of the degree.

**Advising Supervisor** (ADS: SY-UITS-ADRX-ACADV)
Has Academic Advisor(s) who report to them as supervisor, is capable of fulfilling the role of academic advisor but does not do so on a regular basis. Will have same view of data as Academic Advisor.

**Advising Administrator** (ADS: SY-UITS-ADRX-ADMIN)
Serves in a capacity to coordinate the work of a group of academic advisors, or faculty advisors, but is not officially their supervisor. Is responsible for AdRx profile management of a group or groups. Will have same view of data as Academic Advisor.

**Administrator, Staff Y, most other users** (ADS: SY-UITS-ADRX-STAFF)
View may vary depending on role and business practices of the given academic unit.
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Tutor, other very limited roles with extremely limited access to student record data and access without Duo. (ADS: SY- UITS-ADRX-CASONLY)

For example, Peer Educator for the MoneySmarts (Financial Literacy project). This is a student who can:

- Look up a student
- Leave a note for a student
- View only contacts and notes that have been created by users in their Role
- See no other data or information

Steps

1. To manage profiles in Advising Records, click Admin User Profiles.

2. Click Add a new Person.

3. Enter the person’s ID and click search.

4. This will create a User Profile Selection page with the person identified in the tab.

5. Click Add New Profile.
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6. This will bring up the *Edit User Profile* page. Users may have one or more profiles. If they have more than one role, they (may) need to have more than one profile.

There are five areas of information used to create and maintain a profile. Not all of them are required. If required, the information is marked with an asterisk.
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1. General Profile Data

- **Valid** Begin and End date. Enter a begin-date, leave end-date for later, when the user changes jobs, this role/profile, or leaves IU.
- Select a **Campus**. If the person works on more than one campus they will need a profile for each campus.
- Select a **Role**. If the role you need is not listed here, contact IU-UITS-AA@exchange.iu.edu. Use the suggestions link on the lower left in the portal.
- **Group**: Select the group for which you are the administrator. This will have been created by the exec group in advance.

2. Academic Structure

- **Career** is required. If user works with more than one career, they will need another profile.
- You may include **School** and **Program** if you wish. This is not required. There may be an advantage for some units if they want to use this information for reporting OR for information display in the SAS (Student Appointment Scheduler).

3. Location & Advising Unit

- Not required. However, if these are provided, it will enable AdRx to display the location information, and link to a map, in the Student Appointment Scheduler (SAS) when a student is scheduling an appointment.
4. **Profile Features**

- This area will appear collapsed until the Role field is entered above. Then a tab with checkboxes and labels will appear, displaying the functional features in AdRx that have been associated with that Role.

![Profile Features](image)

- These features are setup in part to control access to data for various Roles. The view here will constitute the maximum features available for this Role. However, administrators may decide that their group doesn’t/won’t use certain functionality, and if they uncheck the appropriate boxes the functionality will not appear to the person with this profile.

- This is controlled at the profile level, to accommodate variability within a group. For example, an administrator may have some advisors who want to use the Student Appointment Scheduler (SAS), but others who do not.

- Admins of this area will also want to be familiar with the My Current Profile functionality in AdRx. This allows users to make certain settings for some features. An administrator may want to have a profile using a certain feature, but also dictate instructions on how the employee is to use that feature.

5. **Tags & Notes**

- **Search Tags** are to supplement search options in the SAS. An advisor might want students interested in a non-academic topic to find them because they have knowledge, an example might be ‘cave rescue’ or some other community activity the student might be interested in.

- **Report Tags.** AdRx and the SAS will have extensive reporting available, based on groups and other attributes. However, within a group, administrators may want to have some reporting options for combinations of advisors or users within their group, and they could add tags to profiles here to accommodate this. An example might be that an admin wants to find data on just those advisors in the group who work with Direct Admits and this could be done with report tags.

- **Notes** are just for you to keep any internal information about this profile should you wish.