Academic Advising
Advising Records (AdRx) My Profile

Overview

All users, including Administrators, must have a profile to access Advising Records. An administrator will assign your advising profile(s) in AdRx. Once this is complete, you can edit your profile(s) under My Current Profile in AdRx.

Steps

- 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.
- Administrators create and manage the profiles of staff in their groups.

Note: If you are advising for multiple academic units, you will be assigned a profile for each unit.

1. On the AdRx main page, if you have more than one profile, under My Profiles select the profile you want to edit by clicking on it. The selected profile appears in bold text.

2. With a profile selected, click on My Current Profile. A page of editable profile details displays.
Clicking on a section row expands the section.

Explanations have been added to many of the fields. To view the explanations, hover over the ? to the right of the field name.

Under the **My profile settings** row, you should set a personal nickname for each profile, allowing you to assign a more meaningful description for your own use. The nickname will not appear on any student record or display.

1. To set a personal nickname for the selected profile, click edit to the right of **Nickname for profile**.

   The top of the screen displays the system assigned values associated with your profile: campus, role (academic vs. athletic or international advisor); divisions; and career of student population served. Good practice suggests creating a nickname that reflects these, so it is easier to distinguish among your profiles on the main page.
2. Enter the nickname and click Submit.

The nickname now displays under My Profiles in the main AdRx page.

Expanding the Appointment Calendar row allows you to set the group advising size for this profile.
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Expanding the Resources row, an Advisor can add resources for their use. This provides easy access to frequently used resources.

1. To add a resource, click edit.

2. Type the title of the resource on the first line and paste the URL of the resource on the second line. Click Submit.

Added Resources are available as active links by clicking on My Resources from the main AdRx page.
Role Notes are available for some roles. By default, these notes are viewable to only individuals in the same role across all IU campuses. Role Notes can be limited to specific campuses by changing the setting under the Role Note row.

1. Be sure to have the appropriate profile selected first, then click the Role Note row.

2. Click edit.

3. The default shows All Campuses.

4. Click the radio button beside Specific Campuses to see the option to select a specific campus.

5. Select the check box beside the campuses you want to share your notes with and click Submit.
Advisor Bio: text for profile box allows you to add information that will appear in the Advising Records Profile box that the students will see in the Appointment Scheduler.

Under Scheduler for Student, you can customize messages students will see when they use the Student Appointment Scheduler and set how far out appointments can be set.

- The Confirmation Message lets you add customized text that students will see when they receive a confirmation message.
- The Maximum Future Appointment Time lets you set the maximum number of days into the future for which a student can schedule an appointment.
- The Minimum Future Appointment Time lets you set the minimum number of hours required in advance before a student can schedule an appointment.
- The SAS Outlook integration option provides the ability to opt-in to this feature.
- The Appointment Reminder Message lets you add customized text that the student will receive in the appointment reminder message.

At the bottom of My Current Profile is the Quick Notes section. Quick Notes are notes or comments that advisors, staff and faculty find themselves using regularly when documenting their conversations with students. For more information creating and editing Quick Notes, click here.