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 AdRx profile(s) and SAS options (if enabled) under the My Profile page in AdRx.

- All users have a profile, which includes a role; key roles must also be in ADS groups (exec, admin, advisor, staff).
- 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 users to setup certain functionality as appropriate to them individually; this is done in My Profile in AdRx.
- Administrators create and manage the profiles of staff in their groups.
Steps

Accessing My Profile in AdRx

1. From the AdRx main page, click My Profile.

The My Profile page displays. The active profile appears in the upper right corner.

2. If you have multiple profiles, click the down arrow next to the profile to change the active profile.

The left side of the My Profile page provides access to the AdRx customization menu. If the active profile has the Student Appointment Scheduler enabled, the SAS menu is also made available.
Customizing AdRx

Adding and Maintaining a Profile Nickname

*My Profile* provides the ability to assign a nickname to an AdRx profile. This allows a user to assign a more meaningful description to a profile for their own use. The nickname will not appear on any student record or display.

1. Ensure the **AdRx** customization menu option is active.
2. In the **Profile Customization** row, click the down arrow to expand the row.
3. Click the arrow to the right of **Nickname for profile**.
4. Click **New**.
5. Enter a profile nickname and click **Save**.
The nickname now displays in the main AdRx page.

It also displays in the upper right corner of the My Profile page. Once a nickname is applied, it can be changed by navigating back to the same section and clicking Edit.

6. Click Close.

Adding and Managing Frequently Used URLs

Users can add up to 20 URLs to their AdRx profile.

1. Ensure the AdRx customization menu option is active.
2. In the Profile Customization row, click the down arrow to expand the row.
3. Click the arrow in the Resources row.

4. Click Add New Resources.
5. Type the title of the resource, paste the URL of the resource (the “http://” must be included in the URL), and click **Save**.

Added resources are now available as active links by clicking on **My Resources** from the main AdRx page.

To change or remove an added resource, navigate to the same section and click the corresponding **Edit** or **Delete** for that resource.
Adding and Managing Quick Notes

Quick Notes are notes or comments that advisors, staff, and faculty find themselves using regularly when documenting their conversations with students.

1. Ensure the AdRx customization menu option is active.
2. In the Notes Customization row, click the down arrow to expand the row.
3. Click the arrow in the Manage Quick Notes row.
4. Click New Quick Note.
5. Enter a Title, Category (or select an existing category), and the Note.
6. Click **Save**.

The Quick Note is now available when adding a Note to a student’s advising record.

Added Quick Notes can also be edited or deleted from the **Manage Quick Notes** section.

- If editing, select the desired Quick Note, make the changes, and click **Save**.
- If deleting, select the desired Quick Note and click **Delete**.
Added categories can also be edited or deleted from the Manage Quick Notes section.

- If editing, select the desired category, make the change, and click Rename.
- If deleting, select the desired category and click Delete.

**NOTE:** If a category is deleted, all associated Quick Notes are also removed.

7. Click Close.
Managing Access to Role Notes by Campus

Role notes are only available for some roles; this section only displays for users assigned to those specific roles. By default, these notes are viewable to only individuals in the same role across all IU campuses, though role notes can be limited to specific campuses.

1. Be sure to have the appropriate profile selected first, then click the Role Note Campus Restriction row under Notes Customization.

2. The default shows “All Campuses”; click Edit.

3. Click the radio button beside “Specific Campuses”, make the selection(s), then click Save.
Customizing Discussion Topics Options

This menu allows users to hide Discussion Topic values under the Discussion Topics selection area in AdRx, so only those values determined applicable are available to choose from when they create a note.

**NOTE:** Before you begin hiding topics, please check with your advising director or other relevant administrator to ensure that you are not hiding topics that may in fact be needed for your work with students.

1. Ensure the **AdRx** customization menu option is active.
2. In the **Notes Customization** row, click the down arrow to expand the row.
3. Click the arrow in the **Customize Discussion Topic Options** row.
4. From the **My Discussion Topics** area, click ✴️ next to the Discussion Topic you do not want displayed as an option when creating a note, then click **Save**.

If you decide to display a previously hidden value, click 🔍 next to the value under the **Hidden Discussion Topics** area, then click **Save**.
Customizing Advising Purposes Options

This menu allows users to hide Advising Purpose values under the Advising Purpose dropdown in AdRx, so only those values determined applicable are available to choose from when they create a note.

**NOTE:** Before you begin hiding purposes, please check with your advising director or other relevant administrator to ensure that you are not hiding purposes that may in fact be needed for your work with students.

1. Ensure the **AdRx** customization menu option is active.
2. In the **Notes Customization** row, click the down arrow to expand the row.
3. Click the arrow in the **Customize Advising Purposes** row.

4. From the **My Advising Purpose Items** area, click the circle next to the Advising Purpose you do not want displayed as an option when creating a note, then click **Save**.

If you decide to display a previously hidden value, click the circle next to the value under the **Hidden Advising Purpose Items** area, then click **Save**.
Customizing SAS

If the active profile has the Student Appointment Scheduler (SAS) enabled, *My Profile* displays the SAS customization area.

Managing Calendar Settings

This section provides a number of settings related to the Student Appointment Scheduler.

1. Click *SAS Student Appointment Scheduler* to make it the active customization menu.
2. Click the arrow in the *Calendar Settings* row.
3. Click *Edit*.

- The *Allow drop-in appointments* option lets you choose whether students are able to view drop-in times that you have added to SAS. (Note that selecting “No” only prevents drop-in times from displaying to students, it does not restrict the ability to add them to your calendar.)

- The *Minimum Future Appointment Time* lets you set the minimum number of hours required in advance before a student can schedule an appointment.

- The *Maximum Future Appointment Time* lets you set the maximum number of days into the future for which a student can schedule an appointment.
SAS Appointments Push to Outlook shares created appointments made in SAS with your Exchange account in Outlook.

Please note that only appointments created in SAS after enabling this feature are added to your Outlook calendar.

When this option is enabled, SAS appointments are sent to Outlook. As such, please follow these important guidelines to ensure that SAS appointments are accurately reflected in your Outlook calendar:

- Within Outlook, these SAS appointments should not be declined or deleted, nor should appointment dates and times be changed; these changes should be made within SAS, which when submitted, will automatically be reflected in your Outlook calendar.

- Within the Outlook calendar, users may find it helpful to add information to a scheduled student appointment (for example, if the student is a continuing, transfer, or prospective student). This information should be added to the body of the Outlook calendar entry, not the subject or location fields.

- It is not necessary to accept these SAS appointments in Outlook. The tentative display allows other Outlook users to understand that these times could be blocked for students.

- Within Outlook, these appointments are labeled with a “SAS” categorization; this category should never be removed as it may negatively impact SAS recurring appointments.

- This feature relies on other systems outside of SAS; typically, SAS created appointments are received by Outlook almost immediately, but in times of high volume or external factors beyond the application’s control, delays may occur.

- Note, this option only shares appointments made in SAS to Outlook; refer to Outlook Appointments Push to SAS Calendar to display Outlook events on your SAS calendar.
• **Outlook Appointments Push to SAS Calendar** shares Outlook calendar appointments with your SAS calendar.

**NOTE:** After enabling this feature, follow these steps to initiate the push of Outlook events to your SAS calendar:

1) Open your SAS calendar (or refresh the browser page if already opened).

2) The **Sync with Outlook** button is now included at the top of the calendar; click the button.

3) After a few moments (up to two minutes) refresh the browser page.

**Outlook Events in SAS Calendar:**

- Outlook events display in a light blue color with an Outlook icon.
- Use the **Sync with Outlook** button if you feel your SAS calendar is not displaying updated Outlook information.
- You cannot edit Outlook events in the SAS calendar.
- Outlook events that occur on the day the push functionality is enabled, and up to 12 months in the future, are displayed in the SAS calendar. As such, Outlook events (single or reoccurring) that occurred on a day prior to enabling this feature are not displayed.
- Private Outlook events will not display a subject like other events. SAS Calendar keeps that information hidden and displays “Private Appointment” instead.
- No “free” or “working elsewhere” Outlook events will display in SAS Calendar.
- All day (24 hour) Outlook events will not display in SAS Calendar.
- Outlook events that occur before 7:00am, but end after, will display in SAS Calendar with a slight modification. SAS Calendar will display the start time as 7:00am but will display end times that match Outlook (example: Outlook event 6:00 – 8:00am will display as 7:00 – 8:00am in SAS Calendar).
- Historic Outlook event data remains static, even if you change it in Outlook.

**Conflicting SAS Appointments and Outlook Events**

- Outlook events will drop behind existing SAS calendar appointments, appearing as a “shadow” behind the SAS appointment slot. You can click on the SAS appointment in the foreground to manage it as normal.
- If you would like to create a SAS appointment that conflicts with an Outlook event, 1) click an empty appointment slot, 2) click **Advanced Options**, 3) change the start and end times to meet your needs.

4. After reviewing and setting all the calendar settings, click **Save**.
Adding and Maintaining an Advisor Bio

My Profile allows users to add bio information that will appear in the Advising Records Profile box that the students will see in the appointment scheduler.

1. Ensure SAS Student Appointment Scheduler is active.

2. Click the arrow in the Advisor Information row.

3. Click the arrow in the Advisor Bio and Information for Students to Read row, then click New.

A free form text box is provided.

4. When the bio/information has been entered, click Save.

Saved bio/information can be revised or removed by navigating to the same section, revising or deleting the text, and clicking Save.

5. Click Close to display all Advisor Information customization options.
Adding and Managing Search Tags

Search tags are keywords or phrases used to assist students in locating the correct advisor via the Search for Advisor feature in their appointment scheduler.

1. Click the arrow in the **Search Tag** row to display available options. Search tag options are displayed.

   a. Existing search tags maintained by your AdRx administrator are displayed.

   b. If it is not already included as an existing tag, consider adding your department/subject area.

   c. Add a tag related to your area of specialty to assist students in locating you as the correct advisor (for example, “probation advisor” or “overseas programs”).

2. Enter the desired search tag names and click **Add**.

3. The search tags are now displayed in the student’s SAS Search for Advisor feature.

   Added tags can be removed by clicking in the x within the tag container (for example, Overseas Programs x).

For questions about custom tags, contact your supervisor or OCSS (ocss@iu.edu).
Adding and Maintaining Appointment Confirmation and Reminder Messages

My Profile allows users to customize appointment confirmation and reminder messages sent to students.

1. Ensure SAS Student Appointment Scheduler is active.
2. Click the arrow in the Advisor Messaging row.
3. Click the corresponding arrow in the Appointment Confirmation Message to Students or the Appointment Reminder Message to Students row, then click New.
4. A free form text box is provided for either option.
5. When the message has been entered, click Save.

Saved confirmation and reminder messages can be revised or removed by navigating to the same section, revising or deleting the text, and clicking Save.