Overview

This job aid orients those AdRx users with appropriate access to the student’s Information workspace within the application. It introduces the user to the information, functionality, and tools available within the workspace.

Steps

Logging into AdRx

1. Navigate to one.iu.edu.
2. In the Search bar, type “AdRx” or “advising records” and press Enter.
3. Click on the Advising Records (AdRx) task.
4. If you are not currently signed in with your CAS credentials, enter your Username, Passphrase, and method of Two-Step Duo authentication at the prompts.
5. At the AdRx login page, click Faculty/Staff Login.
6. Once in AdRx, search for a student. (See the Find a Student job aid for instructions on locating a student record in AdRx.)
7. Click on the resulting record.

The student’s Information workspace is displayed.
Reviewing the Student Information Workspace

The student’s Information workspace contains:

a) access to the History workspace, which displays a full text view of all contact records
b) SIS and iGPS links (student specific)
c) access to the student’s view of the Student Appointment Scheduler (if enabled)
d) an accordion menu that expands to display various elements of the student’s record
e) general advising tools

We will begin by reviewing the information available from the accordion menu.

Student Information via the Accordion Menu

The center of the Information workspace page organizes access to different aspects of the student record.

Across the top of the menu is an information bar. This area displays assigned advisors and provides access to Class Standing, Academic Standing, and Status.

Users will also find the Student Engagement Roster (SER) Feedback Indicator in the information bar, which displays a high-level overview of engagement feedback submitted by an instructor.
Clicking on the indicator displays the SER Advisor View page, which provides detailed engagement feedback. For more information on SER, see the Student Engagement Roster for Advisors job aid.

The following are the available sections from the accordion menu, from top to bottom.

- **Upcoming Appointments** is expanded by default and displays both upcoming scheduled appointments and past appointments that need an appointment note to close the contact loop. Appointment notes can be added from this section (for more information, see the Advising Notes job aid).

![Upcoming Appointments](image)

- **Advising History** is expanded by default and displays prior contact records. Clicking on an entry displays a detailed view of the record.

New advising notes that are not related to a scheduled appointment in SAS are added from this section by clicking **Add New Advising Note** in the section header (for more information, see the Advising Notes job aid).

If there are notes that are related to each other, clicking **Related Notes** in the row will filter the section to display only those connected notes. Clicking **All Notes** returns the view to display all contact records.

![Advising History](image)

- **Address/Contact Information** contains the student’s address, phone, and email information.

![Address/Contact Information](image)
• **Academic Information** displays the Program/Plan details, Expected Graduation Term, Degree Checkout Status, current Program Summary statistics, Student Registration Appointments, and Current/Future Enrollment.

• **Demographic Data** displays student bio-demographic, residency, and visa status information.

• **Student Groups** displays, by campus, the groups with which the student is affiliated.

• **Admissions Information** displays a summary of student’s admission statuses at all campuses where an application has been submitted.
• **External Education** displays summary information about the student’s high school and post-secondary education.

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• **Test Scores / Transfer Credit / Other Credit** displays summary details about credit articulated to the student transcript from one of these sources.

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• **Archived AARs** displays summary details of any AARs run on the student in the past that were then archived. To see any Archived AAR, click the **View AAR** link.

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**Viewing the History Workspace**

By clicking **History** at the top of the page, AdRx displays a full text view of all contact records for the student.
Users can access and add notes from either the *Information* or *History* workspace. However, by switching to the *History* workspace, users can scroll through the full text of all notes entered about the student in one screen.

**SIS and iGPS Access**

Access to SIS is listed across the top of the page. These are direct links to SIS functions. By using these links, users can quickly scan SIS data about their selected student, without having another window open, and without navigating through the various SIS menus.

Also at the top of the page is an **iGPS** (Interactive Graduation Planning System) link to the iGPS Planner.

**SAS Student View**

If enabled, the **SAS Student View** allows users to view the student’s advising appointments (upcoming, past, and cancelled) and provides the ability to assist students in scheduling with other advisors when needed.

**Tools**

AdRx provides quick access to various general advising tools.

- **Student Search** - users can search for individual students with the basic search tool or find groups of students via the application’s extensive list of search parameters. See the [Find a Student](#) job aid to learn more.

- **Caseload** displays students assigned in SIS to the advisor doing the search and ad-hoc groups built by the advisor. See the [Caseload](#) job aid to learn more.

- **Planner Reviews** - For those users who use this functionality, the count is the number of requested planner reviews that require action by the user.

- **Overdue Appointment Notes** - this provides a count of appointments that were scheduled with the user that need an appointment note and navigates to *My Action List* in AdRx when clicked.

- **Draft Contact Notes** – this provides a count of saved contact notes that have not been submitted yet and navigates to *My Action List* in AdRx when clicked.
• **Appointments** (for SAS users) displays a count of the user’s SAS appointments today and navigates to the *Appointments* page where users can view today’s scheduled appointments. The *Appointments* page also provides the ability to view the submitted appointment note, create an appointment note, and edit a draft note you saved for an appointment.

• **Reminders** provides users the ability to create and manage reminders without leaving the AdRx environment.

• **My Calendar** provides access the **Student Appointment Scheduler (SAS)** tool.

• **My Resources** tool provides a repository for useful website links, documents, or other content users would like to make readily available. Instructions for how to add content to this area are in the **My Profile** job aid.

• The **My Profile** area is displayed for users who have more than one profile in AdRx, for example, those who advise more than one type of major interest (Business and Arts & Science) or who have multiple advisor roles (academic and athletic advising). See the **My Profiles** job aid for detailed information about setting and editing AdRx profiles.

• **SIS My Advisees** provides a direct link to the *My Advisees* page in the SIS Administrative Center.

• **SIS Admin Center** provides a direct link to the home page of the SIS Administrative Center.

• **SIS Main Menu**

• **Public Degree Maps** provides a direct link to the iGPS Degree Map Search.

• **iGPS Course Search**

• **iGPS/Advising Test Environment** provides a test environment through AdRx where users can view and manipulate the iGPS process. Users can practice within the test environment without affecting the student’s record.

• **Canvas**

• **AA BI Reports** provides a link to the Academic Advising report center at Decision Support.

• **Student Involvement (Campus Labs Engage)**

• **AdRx Training Resources**