IUP Advise Quick Reference Guide #1 Log In & Preferences
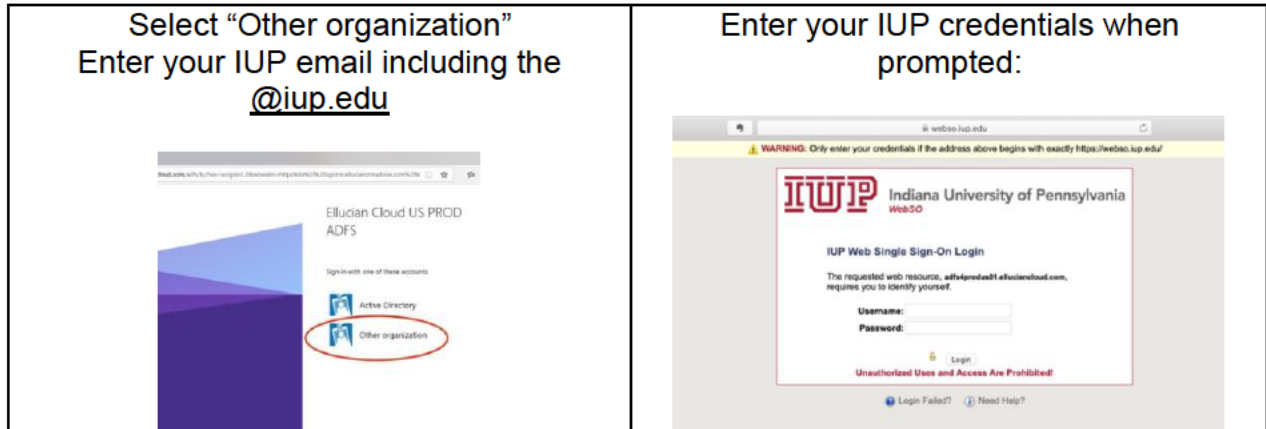
Connect to the IUP VPN for full access to IUP Advise quick links.

Access IUP Advise: https://iupcrm.elluciancrmadvise.com

Enable pop-up windows.

Select "Other organization" Enter your IUP email including the @iup.edu	Enter your IUP credentials when prompted:

**IUP Advise provides users with a dashboard.**

Faculty Dashboard = data on a teaching faculty member's sections and students

IUP Advising Dashboard = data on a faculty or staff advisor's advisees

Department Dashboard = available to department chairs; data on all majors

College Dashboard = available to ADeans; data on all students in assigned college

Use the dropdown menu option in the window to see available dashboards. Use the "set as default" option to pin your preferred dashboard as the default.
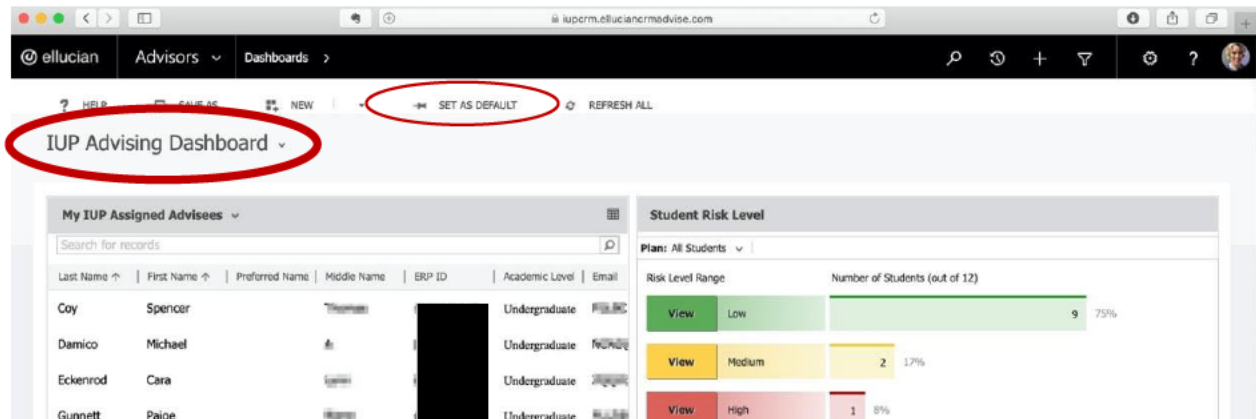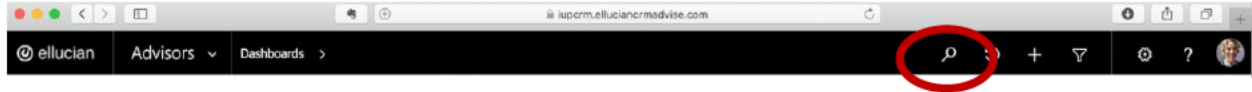
Setting your Preferences

These directions focus on setting your basic profile preferences.
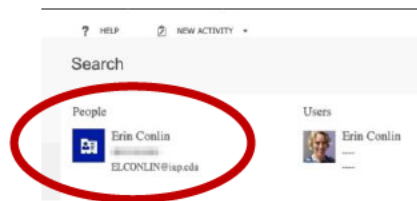Other menu items will be discussed in the Menu Quick Reference Guide.

Confirm your profile

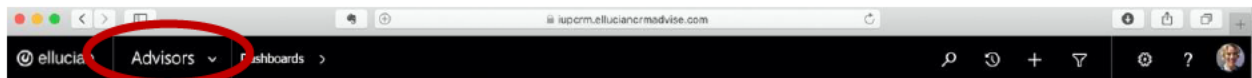Click on the search icon in the toolbar.

Enter your Banner ID or name.
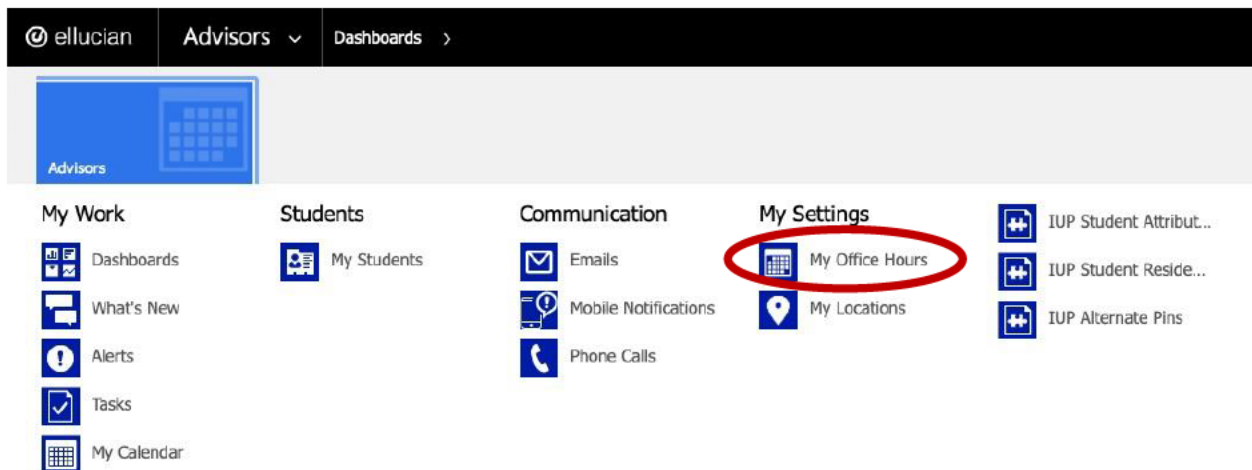
Select your profile listed under the "People"

Confirm the information listed is correct.

To exit this screen and return to your dashboard, click on "Advisors" in the menu bar.

Set Office Hours

Office Hours = users should update their office hours each semester if the times change (students see office hours in the IUP Advise Student Experience Portal)
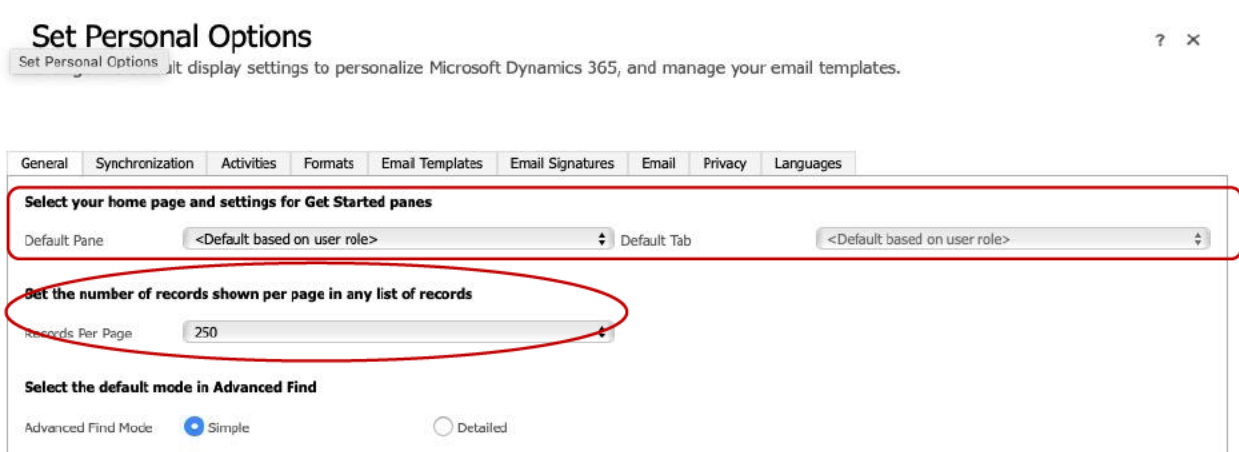
Edit profile image

Click on the circle image on the far right of the menu bar. (upload image < than 5 MB)

Change your **Personal Options** to the following by clicking on the **gear** icon in the menu bar. (If the Options window does not appear, **enable pop-up windows** and try again.)

Set Personal Options Window

General settings tab

1. Under the "General" tab, change the first option to, "Select your home page and settings for Get Started panes" to:
   a. Default Pane = Advisors
   b. Default tab = Dashboards

2. Under the "General" tab, change the second option, "Set the number of records shown per page in any list of records" to 250 records per page.

Email Signatures tab
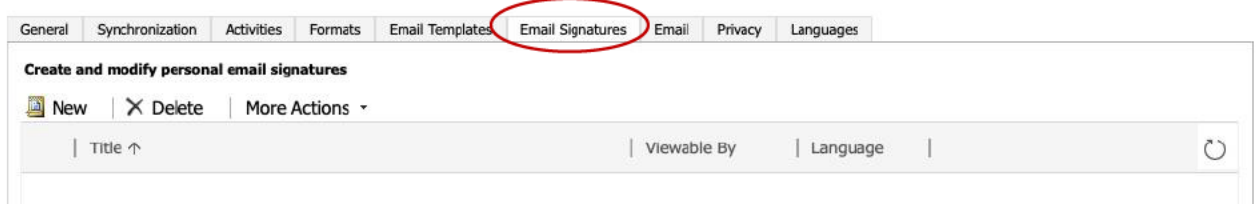
3. Click on "New" (opens a new email signature template in a pop-up window)
    a. Title = the name of the email signature
    b. Type in a new signature or copy and paste an existing signature into the space provided
    c. <mark>Highlight text and change it to</mark>

Privacy tab

4. Click on the "Privacy" tab (second from right in the options window)

5. Change the error notification preference to "Never send an error report to Microsoft about Microsoft Dynamics 365"
6. **Save** your changes

<u>Important Note: IUP Advise "Help" Option</u>

 Use the "? Help" option below the menu bar, <u>not</u> the question mark in the menu bar next to your profile picture. (The menu bar option provides help for Microsoft Dynamics)