Common Tasks

Use this table as a reference to how to navigate to common tasks in CRM Advise.
This is not the complete step by step instructions – just the initial navigation steps.

If you want to	Module	Sub-module	Then
Open a dashboard	Advisors, Faculty, or Managers	Dashboards	----
Find a student record	From any dashboard	Click the Search icon	Enter student name in Search field
See a list of all my active student records	Faculty	Dashboards	View My Students list
See a list of all my active advisee records	Advisors	Dashboards	View My Advisees list
View all at risk students	Advisors, Faculty, or Success Manager	Dashboards	Click the red View link in the in the Scoring Plans chart
View a student record	From any dashboard	Dashboards	Select the student name from the alert.
Create a new activity	Advisors, Faculty, or Success Manager	Dashboards or Student Record	Click Create on the navigation bar or Click the plus sign (+) in the My Open Activities list
Create an alert	Advisors, Faculty, or Success Manager	Dashboards or Student Record	Select Alerts then Create Alerts
Perform an Advanced Find	----	---	Select Advanced Find from the navigation bar
Run a report	From any dashboard	Reports	Select the report to run

Set Up Tasks for Administrators and IT Leads

Use these tables as a reference to how to navigate to success engine and communication tasks in CRM Advise.
This is not the complete step by step instructions – just the initial navigation steps.

Success Engine

If you want to	Module	Sub-module	Then
Create an Indicator Rule	Success Engine	Indicator Rules	Select New on the command bar.
Create Alert Rules	Success Engine	Alert Rules	Select New on the command bar.
Create Risk Conditions	Success Engine	Conditions	Select New on the command bar.
Create Scoring Rules	Success Engine	Scoring Rules	Select New on the command bar.
Create Scoring Plans	Success Engine	Scoring Plans	Select New on the command bar.

Communications and Engagement Plans Tasks

If you want to	Module	Sub-module	Then
Create Quick Engagements	---	---	Create an Advanced Find from the Person Entity
Create an Engagement Activity	Communications	Engagement Activities	Select the type of activity from the command bar
Create Activity Templates	Communications	Activity Templates	Select New on the command bar
Create Engagement Lists	Communications	Engagement Lists	Select New on the command bar.
Create Engagement Plans	Communications	Manage Engagement Plans	Select New on the command bar.

Set Up Tasks for Administrators and IT Leads

Use this table as a reference to how to navigate to administrative tasks in CRM Advise.
This is not the complete step by step instructions – just the initial navigation steps.

If you want to	Module	Sub-module	Then
Create a new user	Settings	Security	Users
Copy a security role	Settings	Security	Security Roles, then Action→ Copy Role
Create a Team	Settings	Security	Teams
Update the Current and Prior Term	Settings	Settings Home	Set Current/Prior Terms
Use the Data Transfer Tool			The Data Transfer Tool should be downloaded and used on the Server
Use the Workflow Scheduler	Settings	Workflow Scheduler	Review schedule
Monitor System Jobs	Settings	System Jobs	Review list of system jobs
Import Data	Settings	Data Management Templates	Imports