



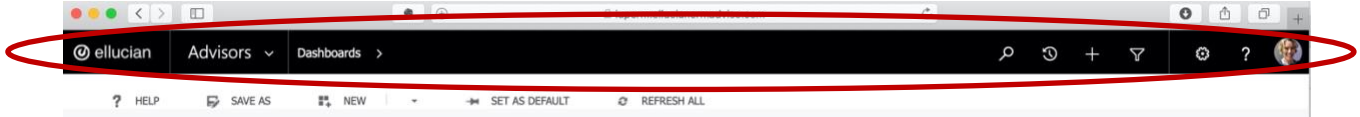
IUP Advise Quick Reference Guide #2 Menu Options

Connect to the [IUP VPN](#) for full access to IUP Advise quick links.

Access IUP Advise: <https://IUPCRM.elluciancrmadvise.com>

Enable pop-up windows.

Menu Bar

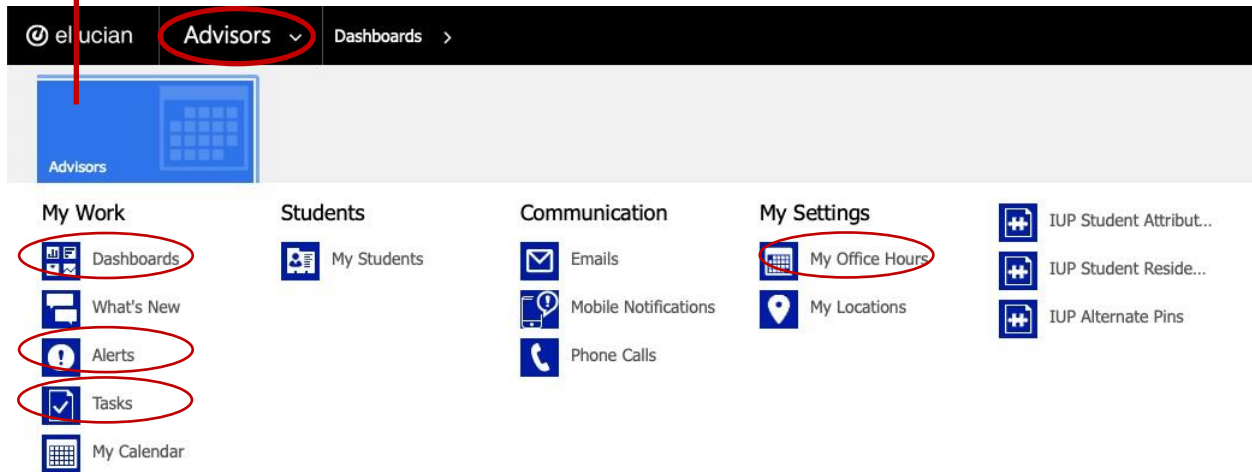


- 1) Users may see different options in the dropdown menu options based on their IUP Advise access privileges.
- 2) This guide highlights frequently used features.

Left-side menu bar: Ellucian, Advisors, Dashboards

Clicking on “ellucian” will return users to the default home screen

“Advisors” dropdown menu options identified and explained



Dashboards = Returns user to last opened dashboard

Alerts = lists an advisor’s alerts (open/closed, etc)

Tasks = lists an advisor’s tasks (open/completed, etc.)

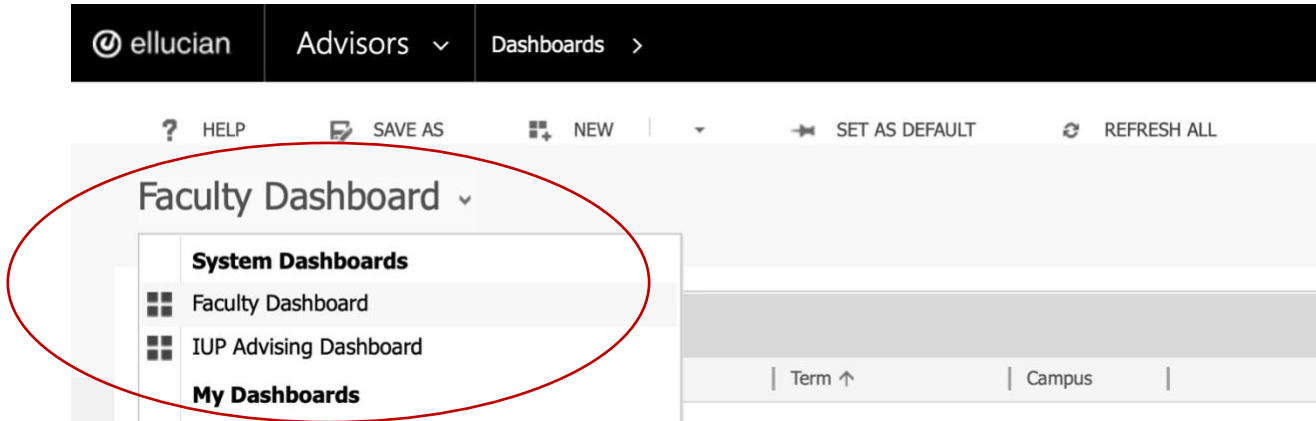
Office Hours = users should update their office hours each semester if the times change (students see office hours in the IUP Advise Student Experience Portal)

(IUP Alternate Pins = better accessed through a specific student’s profile)

Clicking “Advisors” will return user to the last dashboard opened.

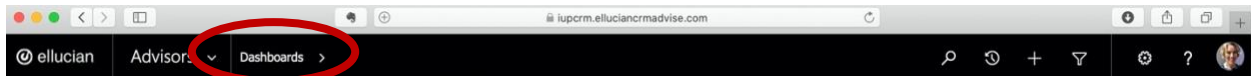


To change dashboard views, click on the dropdown menu in the dashboard window



****Reminder: Clicking on “ellucian” will return users to the default home screen****

“Dashboards” menu bar dropdown menu



Dashboards dropdown menu will displace recently viewed dashboards for quick navigation to available dashboards if users have access to many dashboards.

Right-side Menu: Search, Recently Viewed, Settings, Profile Image



Magnifying Glass = person search (partial or full name or Banner ID; results will pull up all students with “active” IUP Advise records, meaning they were part of the IUP Banner system at some time. Current students will have IUP email addresses visible in the search results)

(Counterclockwise) Clock = recent views (alerts, advisees, office hours, etc.) and records (student profile, specific features in a student profile, dashboards, etc.)

Gear = set Personal Options (see Guide #1 for details)

Question Mark = Do not sure. See note below.

Image = profile picture (see Guide #1 for details)

****The Plus sign icon (New Actions) and Funnel icon (Advanced Search) are covered in the separate guides for advanced users****

IUP Advise “Help” Option

1. **Pop-up windows** must be enabled.
2. Use the “**? Help**” option on the left below the menu bar, not the question mark in the menu bar next to your profile picture. (The menu bar option provides help for Microsoft Dynamics)

