



IUP Advise Quick Reference Guide 6 Activities

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

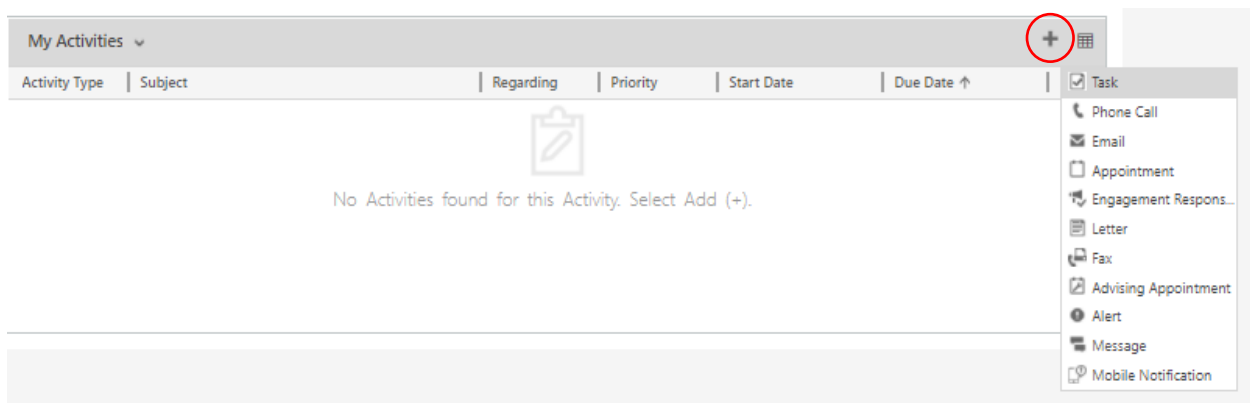
Access IUP Advise: <https://IUPCRM.elluciancrmadvise.com>

Enable pop-up windows.

Activities

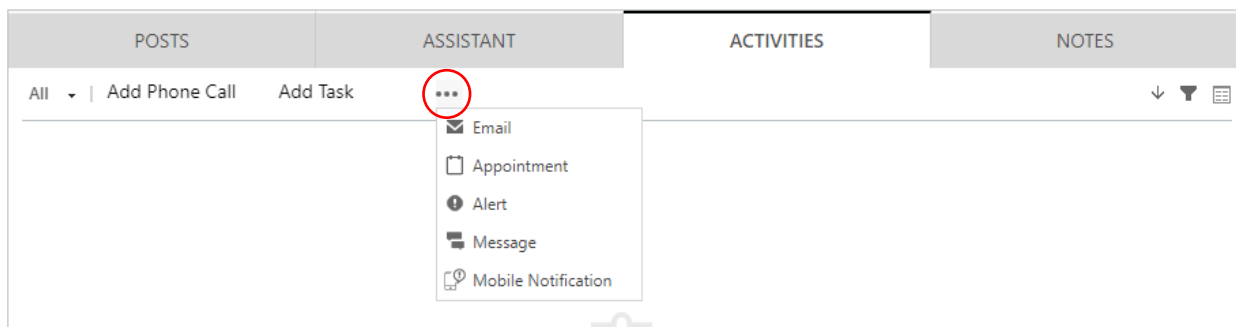
Activities are interactions that can occur between advisors and students. As you can see below, you have access to documenting phone calls, emails, appointments, advising appointments, and other activities on a student's record.

The **Activities** area can be found on both your **IUP Advising and Faculty Dashboards**. An example of this view can be seen below. Select the **+** button you see below to get *full menu* of options to appear. You can also select the square grid button on the right-hand side of the image below to open this view in a new window.



Adding an Activity

You can also add activities by going to a student's profile and finding the posts, assistant, activities, and notes window (shown below). To view additional activities, you should select the **...** button. Once again, selecting the square button on the right-hand side of the image below to open this view in a new window.



Create an Alert

Faculty who want to raise an alert about a student *currently enrolled in one of their sections* should use the [Faculty Self-Service](https://iup.elluciancrmadvise.com/FacultySelfService/) portal. (Faculty Self-Service web address: <https://iup.elluciancrmadvise.com/FacultySelfService/>)

Advisors and general users create alert in IUP Advise through the Activities window.


Click on the ellipses (...) to access the dropdown menu and select “Alert.” (See previous image.) A “New Alert” screen opens. Complete the following steps:

- Type a Subject that clearly identifies the focus of the alert
- Select a Severity level.
- Move your mouse to the right side of the **Category** line and **click on the magnifying glass search icon and select an alert category** or chose to “Look Up More Results.” Identify the best option available that describes the category of alert you are creating.
 - This step is very important to ensure alerts reach the right people on campus to help address them. Some alerts are best handled by a student’s primary advisor, while others are addressed by the Care Team, Office of the Provost, etc.
- Save the Alert.
- Once the alert is saved, you can now add notes or other documentation directly to the alert.

Another example an activity would be setting up an appointment. (At this time, you only want to choose this option if you are using the IUP Advise calendar.)

APPOINTMENT ▾ Priority Normal Status Open

New Appointment ☰

Required
Optional
Subject * 
Location
Regarding
Activity Code

Start Time * 12/9/2020 1:30 PM
End Time * 12/9/2020 2:00 PM
All Day Event
Duration 30 minutes

Description
.....

As you can see from the image above, there are a few things you need to fill out to document this appointment as an activity.

- **Required:** if you are adding the appointment from a student's profile this will automatically be their name.
- **Optional:** use this if you wanted to add additional attendees to the appointment record.
- **Subject:** the topic of your appointment with the student.
- **Location:** the location of the appointment.
- **Regarding:** if you are adding the appointment from a student's profile this will automatically be their name.
- **Activity code:** could be used to track different types of meetings (leave this blank for now).
- **Start time**
- **End time**
- **Duration**
- **Description:** you can add additional information regarding the appointment if you would like.

Once you have provided all the required information, hit "**save**" **located at the top of the screen**. The appointment will now show on that student's profile under activities.