**2018 Redrock Conference**

**What can be customized?**

**A quick reference guide to customizable fields in AdvisorTrac and TutorTrac**

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| **Field/Module Name** | **Where viewed?** | **Where modified?** |
| **Custom Campus Fields** | * Student Entry * Custom Campus tab | * Trac Man * Utilities and Prefs * Search for Custom * Select CustomStudentFields * Set Custom names * Set Field options * Display on Student – YES or NO |
| **Center-Based**  **Student Custom Visit Fields** | * Center Info tab * At Login * At Logout * Student Entry Only * Can be set to Display on LogList | * Magnifying Glass * Center Profile * Either AdvisorTrac or TutorTrac * Prefs * Custom Fields * Center-Based Student Custom Fields |
| **Custom Visit Fields** | * Visit History * At Login * At Logout * Visit Entry Only * Can be set to Display on LogList * Can be set to view on KIOSK entry only | * Magnifying Glass * Center Profile * Either AdvisorTrac or TutorTrac * Prefs * Custom Fields * Visit Custom Fields |
| **Custom Reasons** | * Visit History * At Login * At Logout * Appointment creation | * Magnifying Glass * Center Profile * Either AdvisorTrac or TutorTrac * Reasons |
| **Lists** | * Student Entry – Lists * Shows lists where student belongs * Magnifying Glass – Students – Specific List * Shows all students on that list | * Magnifying Glass * Center Profile * Either AdvisorTrac or TutorTrac * Prefs * Custom Lists |
| **Watch Lists** | * Depending on settings, can be shown on: * Log List * Log In/Out * Student Entry * Student Listing * Appt Entry | * Trac Man * Utilities and Prefs * System Prefs * Watch List Indicator Setup |
| **Field/Module Name** | **Where viewed?** | **Where modified?** |
| **Note: Administrator access to SAGE and SurveyTrac Management is required to make modifications** | | |
| **SAGE Referrals** | * Student Entry * SAGE tab * *Note: The type of referral that a person can view or modify is determined by their “Group Access” settings* | * Trac Man * SAGE Management * SAGE Referral Types * Choose the specific referral * Create a NEW referral |
| **SAGE Emails** | * Emails can include web Links by using special formatting. * #A# href="https://fafsa.ed.gov/"#>FAFSA#/A# * The above coding would display the word FAFSA and would appear as a web link to the fafsa.ed.gov website in the email | * Trac Man * SAGE Management * SAGE Referral Types * Choose the specific referral * Automated Emails |
| **SurveyTrac Surveys** | * Surveys can be setup to show: * During Appointment Creation * During Visit Entry * At Entry * At Entry before 1st Visit During this Survey Period * At Exit * At Exit After 1st Visit During this Survey Period * As a link on the Main Menu * Link on Edit Student * Link on Edit Visit * On Document Posting (Student Entry – Documents tab) * *Note: The type of survey that a person can view or modify is determined by their “Group Access” settings* | * Trac Man * SurveyTrac Management * Choose the specific survey * Create NEW survey |