**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
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