



Advisor Link Training

September 1, 2020

Agenda

- Advisor Link Overview
- Advisor Interface
- Student Community view
 - Browser & Mobile views included
- Support

The image features a large, stylized arrow shape on the left side, pointing right. The arrow is filled with a semi-transparent, olive-green color and contains a background image of a building's interior, likely a library or study hall, with rows of tables and chairs. The Georgia Institute of Technology logo is overlaid on the arrow. The logo consists of the words "Georgia" and "Tech" stacked vertically in a white, sans-serif font. To the right of the text is a white icon of a building tower. Below the text and icon is the tagline "CREATING THE NEXT" in a smaller, white, all-caps sans-serif font. The rest of the slide is white with a large, faint, multi-lined arrow shape pointing right, mirroring the one on the left.

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Advisor Link Overview

Georgia Tech Advisor Link Leadership Team

Executive Leadership and Sponsors

Dr. Colin Potts, Dr. Nelson Baker, Cas D'Angelo, Sandi Bramblett, Dr. Yakut Gazi, James Pete

Advising Steering Committee

Dr. Beth Spencer, Amanda Blocker, Troy Whyte, Daurette Joseph *Dr. Mary Holder, Shaun Dommer,*

*Kristi Mehaffey, Paul Fincannon, Kaitlyn Luppino, Angela Elleby, Jennifer Wooley, Allison Griffin, Brittany Jackson, Crystal Elster, Jeremy Gray, Sam Marney, Lisa Barrien, Karen Ruehlman, **Sidhartha Rakuram,** **Jackson Caruso, Brielle Lonsberry***

Service Management

- Andrew Jarrett
- Russell Wallis

Project Management

- Kim Wynn White
- Sherise Reaves

Communications / Procurement

- Malynda Dorsey
- Teresa Holcomb

Project Description/Business Driver

- **The business vision is two-fold:**

Student-centric: Deliver a unified advising experience to the GT Learning Community through a usable digital platform that brings together data that enables personalized, proactive guidance and engagement

Internal: Implement a secure, consolidated system that facilitates operational efficiencies and accountability across services and teams, surfaces accurate information and predictive analytics and adapts to the future needs of GT stakeholders

- **The Salesforce Advisor Link solution supports:**

- Institute's Strategy 1 – Enrich the student experience

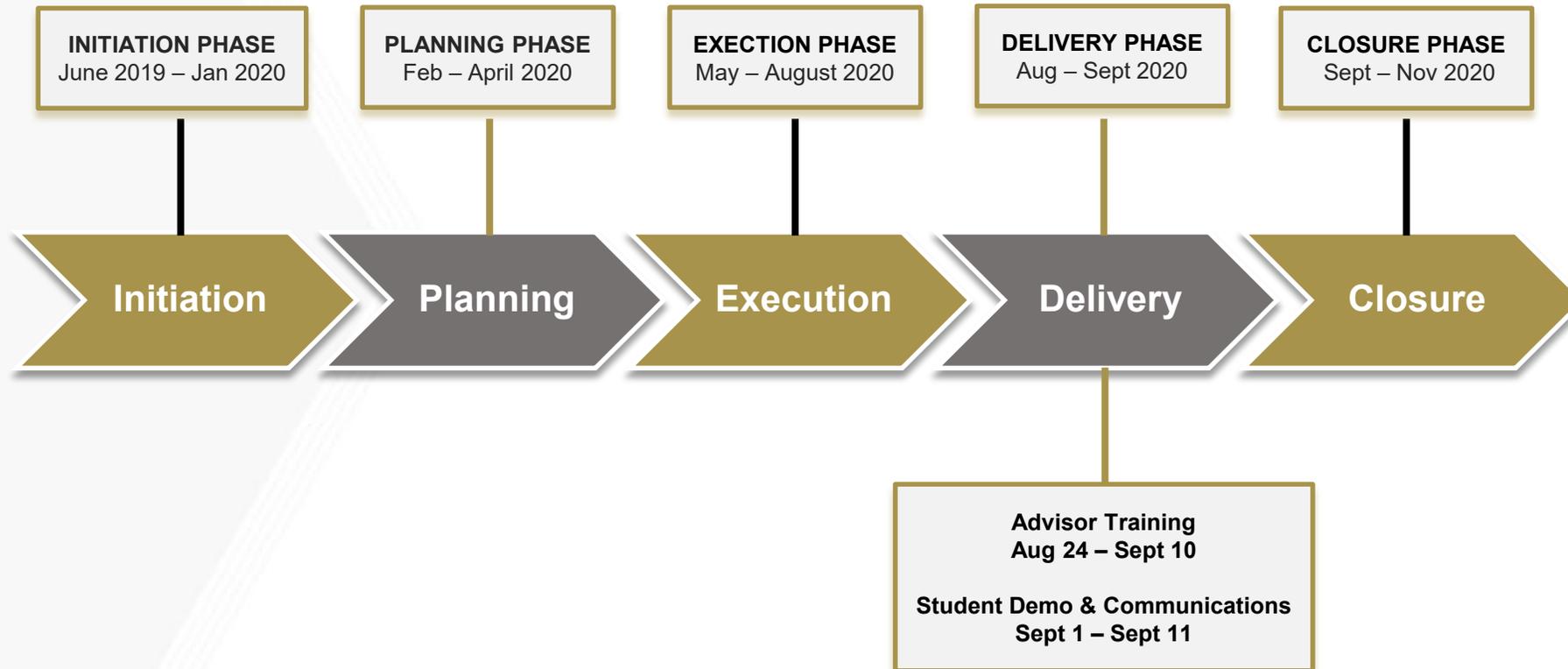
- IT Strategic goals - Transforming Teaching & Learning, Streamlining Service Delivery, and Enhancing Security, Privacy & Accessibility

Project Scope

The project is scoped to implement a single advising solution for **undergraduate and online master's degree programs** with a primary objective to:

- Replace GradesFirst, the current undergraduate advising solution,
- Establish common advising practices and standards for campus,
- Expand Salesforce CRM capability with SAL to support online programs at-scale, such as OMS-Analytics, OMS-Cybersecurity and SOUP
- Integrate SAL with targeted campus systems (e.g. Banner, DegreeWorks, etc)
- Train and onboard advisors & students
- Decommission GradesFirst

Project Timeline



FINANCIAL HOUSING
ATHLETIC
ACADEMIC
STUDY ABROAD



Terminology

Term	Description
Advisee Record (Case) 	A type of Case record that holds all advising-related data for a student, such as notes, advising appointments, and Tasks. Technically, it's an advisee record Case record. But that's quite a mouthful, so we often shorten it to "advisee record."
Success Team 	A team of people serving in advising roles for an advisee. Success teams can consist of both Contacts and Users.
Community 	The online collaboration space where advisees go to connect with their success teams, schedule appointments with advisors, and stay up-to-date on their tasks.



Student Advisor Link Community

Student Community View: Home Screen

- Students can login to the Student Advisor Link Community to connect with their advisors and view related data.
- Students will not have access to other students within the community.

The screenshot displays the Student Community View Home Screen. At the top, there is a navigation bar with the Georgia Tech logo on the left and three menu items: Home, My Success Plans, and My Tasks. A 'Schedule An Appointment' button is located below the navigation bar. The main content area is divided into three sections: 1. Appointment History: A tabbed interface with 'Upcoming', 'Past', and 'Cancelled' tabs. The 'Upcoming' tab is active, showing a 'SCHEDULED APPOINTMENT' card for 'Midterm Advising' on Friday, September 11, 2020, from 5:00 PM to 5:25 PM, with Kim White as the advisor. 2. Success Team: A section titled 'Success Team All Members' with a dropdown arrow and a 'List' button. It shows two advisors: Amanda Blocker (Academic Advisor) and Kim White (Director - IT PMO, Academic Advisor). 3. Tasks: A section titled 'TODAY IS TUESDAY, SEPTEMBER 1, 2020' with two task lists: 'This Month' (3 tasks) and 'Future' (2 tasks).

Schedule An Appointment

See Notifications And Log Out From Your User Icon

View your Home Screen, My Success Plans, and My Tasks from the Navigation Bar

View Your Appointment History

See List Scheduled Appointments

See List of Your Success Team

List Of Tasks Assigned By Date

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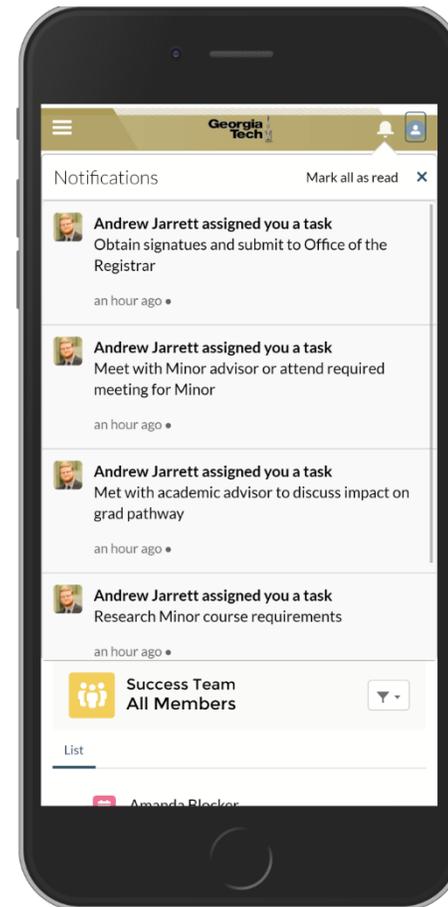
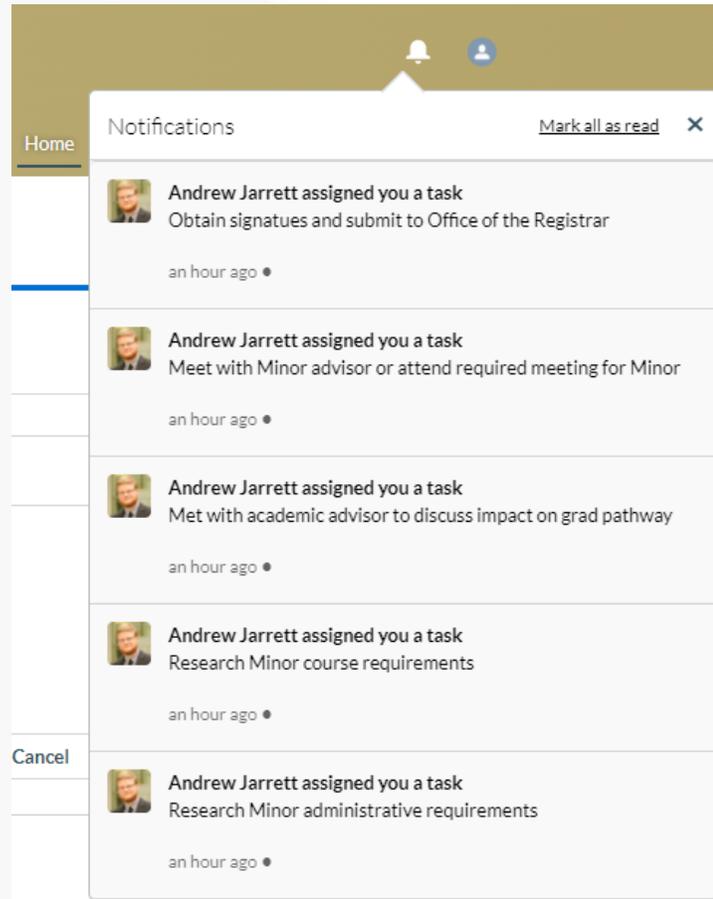
Accessibility
Accountability
Accreditation
Employment

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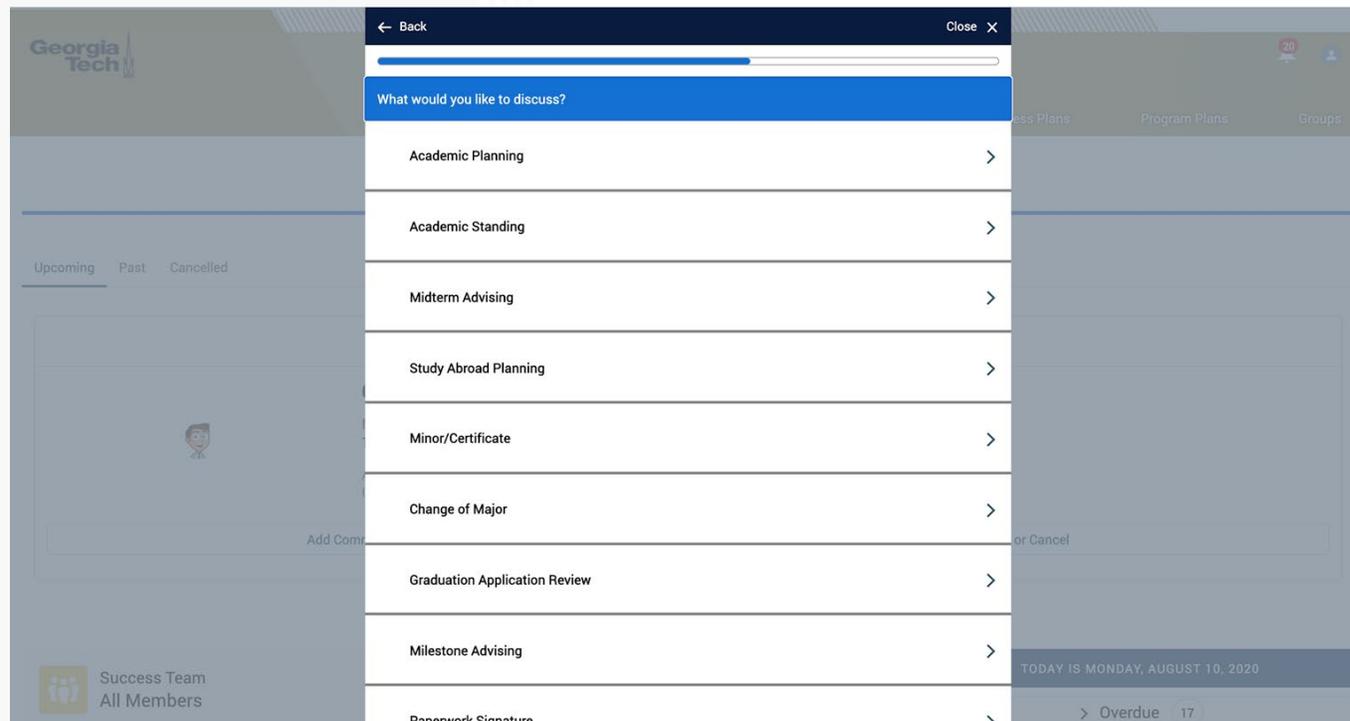
Student Community View: Notification and User Icon

- See list of new Notifications
- Log out of the community by selecting the User Icon



Student Community View: Scheduling an Appointment

- Option 1) Click “Schedule an Appointment” and follow appointment wizard



Student Community View: Scheduling an Appointment

Success Team
All Members

List By Team

Adam Advisor
ADVISOR
Career

Allison Griffin
ACADEMIC ADVISOR II
Graduate Advisor

Amanda Blocker
ACADEMIC ADVISOR I
Pre-Graduate

Beth Spencer
DIRECTOR, CTR FOR ACAD SUCCESS
Physics
Academic & Career Advisor

Cory Landers
Prestigious Fellowship

Financial Aid
Financial Aid

← Back

What would you like to discuss?

Academic Planning

Academic Standing

Midterm Advising

Study Abroad Planning

← Back Close X

Where would you like to meet?

In person

By phone

Web Meeting

← Back Close X

When would you like to meet?

August 2020

Tuesday, August 11, 2020

10:10 AM - 10:40 AM EDT
AVAILABLE

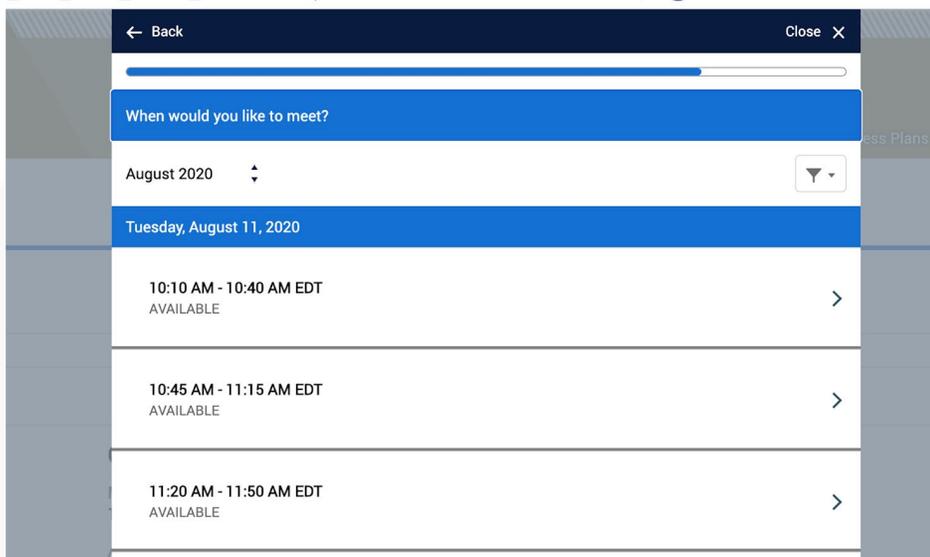
10:45 AM - 11:15 AM EDT
AVAILABLE

11:20 AM - 11:50 AM EDT
AVAILABLE

- **Option 2)** Choose from “My Success Team” to meet with a specific advisor
 - Advisors with Calendar icon means the advisor has availability to schedule an appointment
 - Click “Schedule an Appointment” and follow appointment wizard

Student Community View: Scheduling an Appointment

- Choose your Month/Year
- Choose your Date
- Choose your timeslot
- Confirmation Screen will show are successfully scheduling!



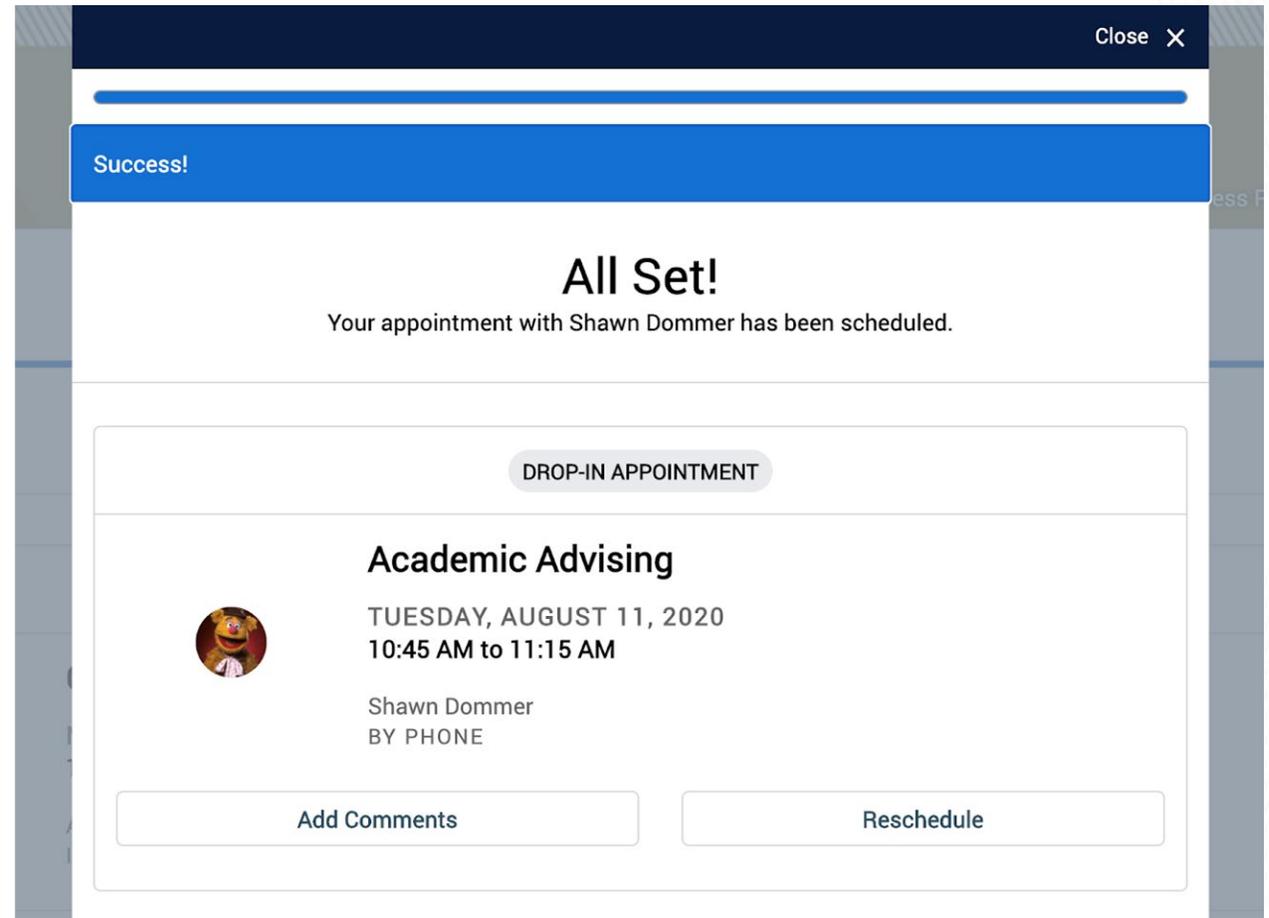
← Back Close X

When would you like to meet?

August 2020

Tuesday, August 11, 2020

10:10 AM - 10:40 AM EDT AVAILABLE	>
10:45 AM - 11:15 AM EDT AVAILABLE	>
11:20 AM - 11:50 AM EDT AVAILABLE	>



Close X

Success!

All Set!

Your appointment with Shawn Dommer has been scheduled.

DROP-IN APPOINTMENT

Academic Advising

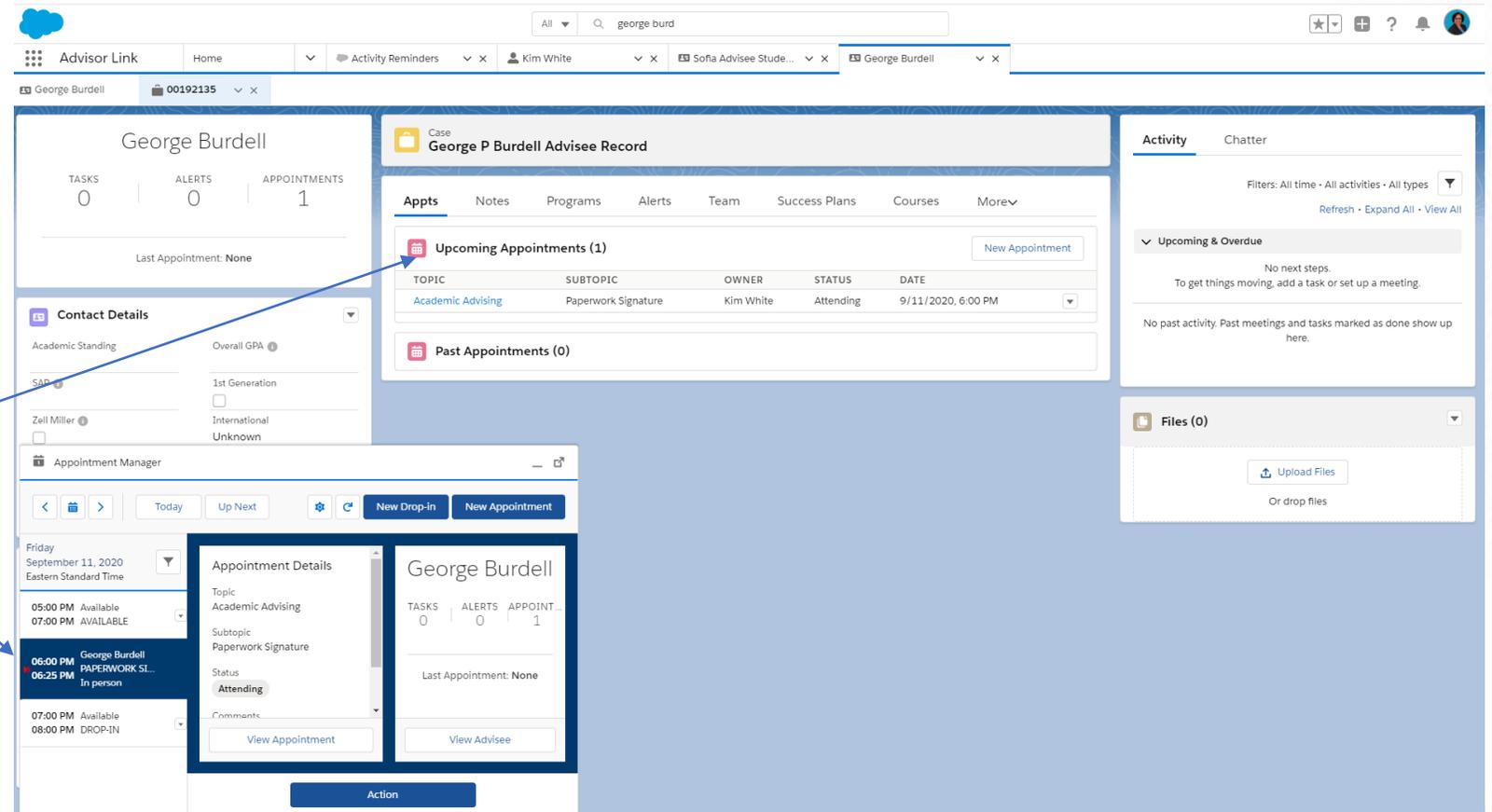
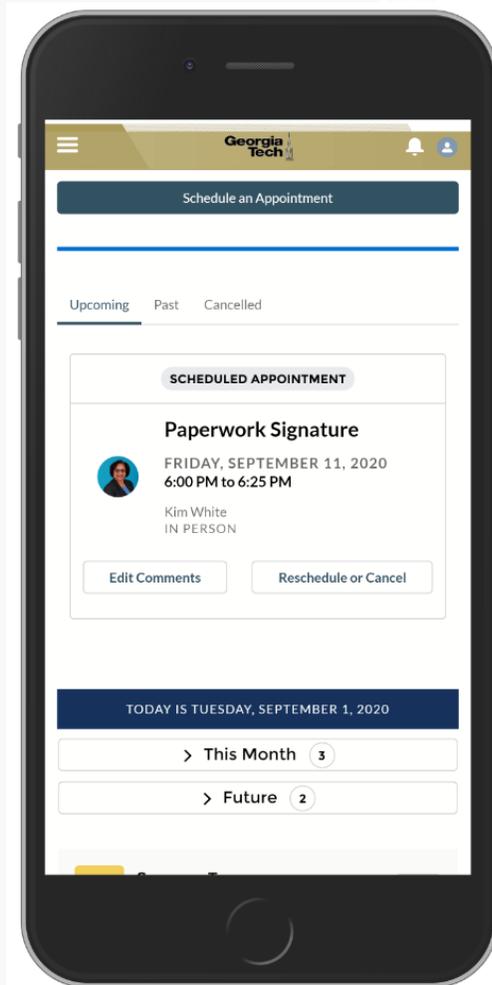
 TUESDAY, AUGUST 11, 2020
10:45 AM to 11:15 AM

Shawn Dommer
BY PHONE

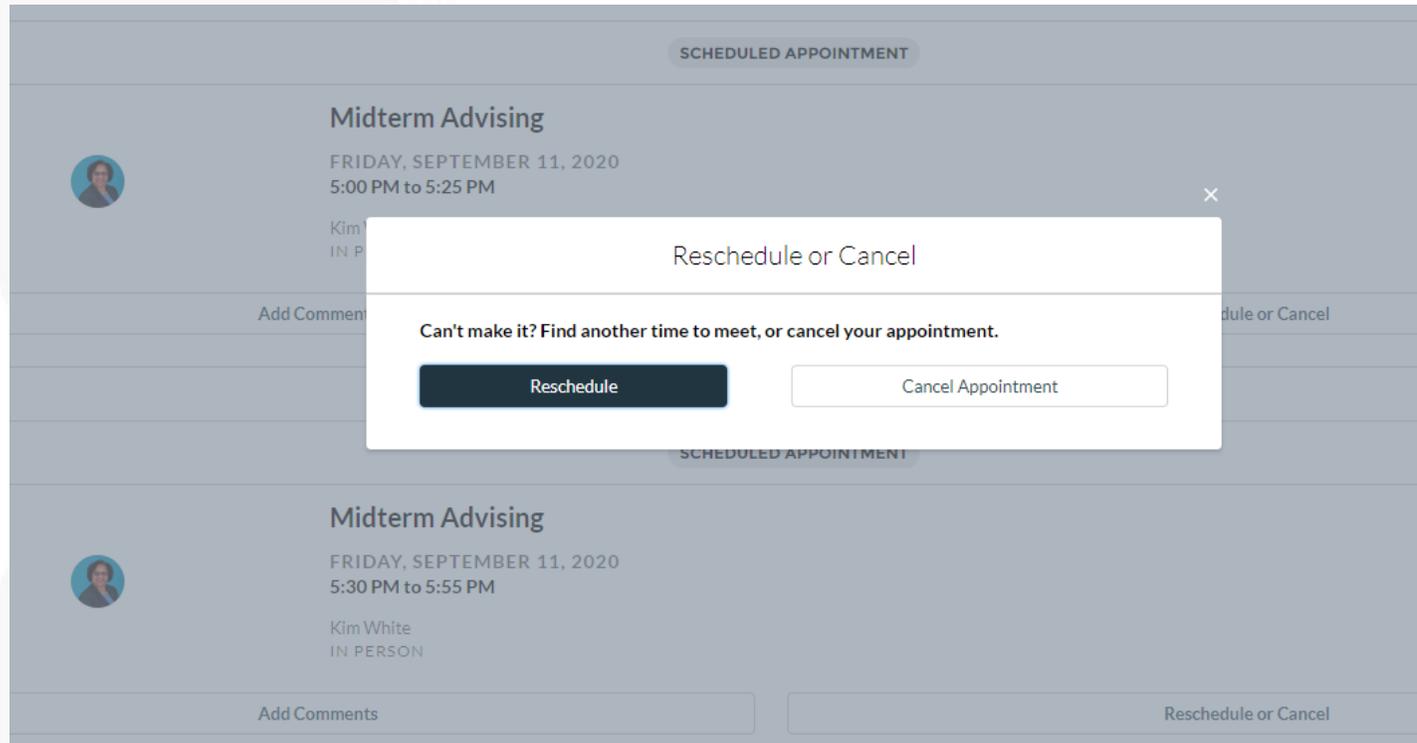
Add Comments Reschedule

Student Community View: Advisor's Appointment View

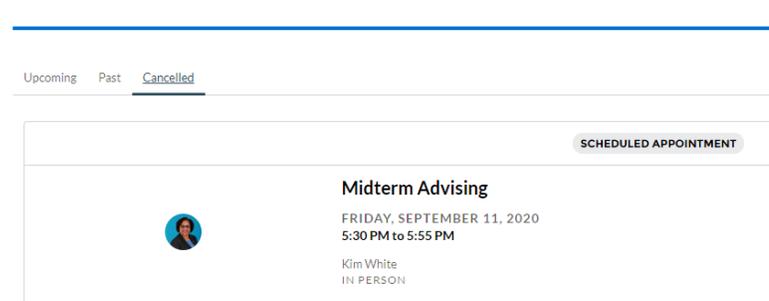
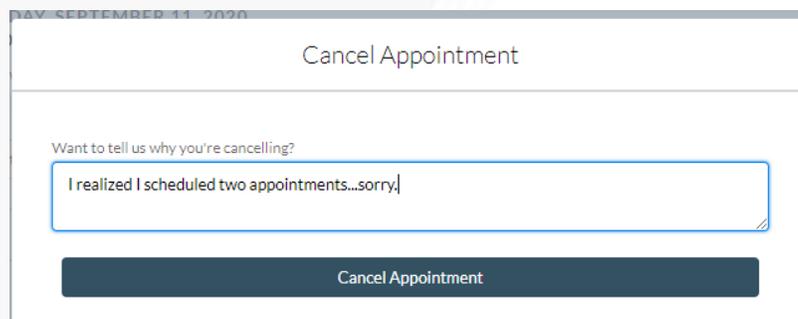
- Your advisor will see the appointment in your case record and in the appointment manager



Student Community View: Cancel or Reschedule an Appointment

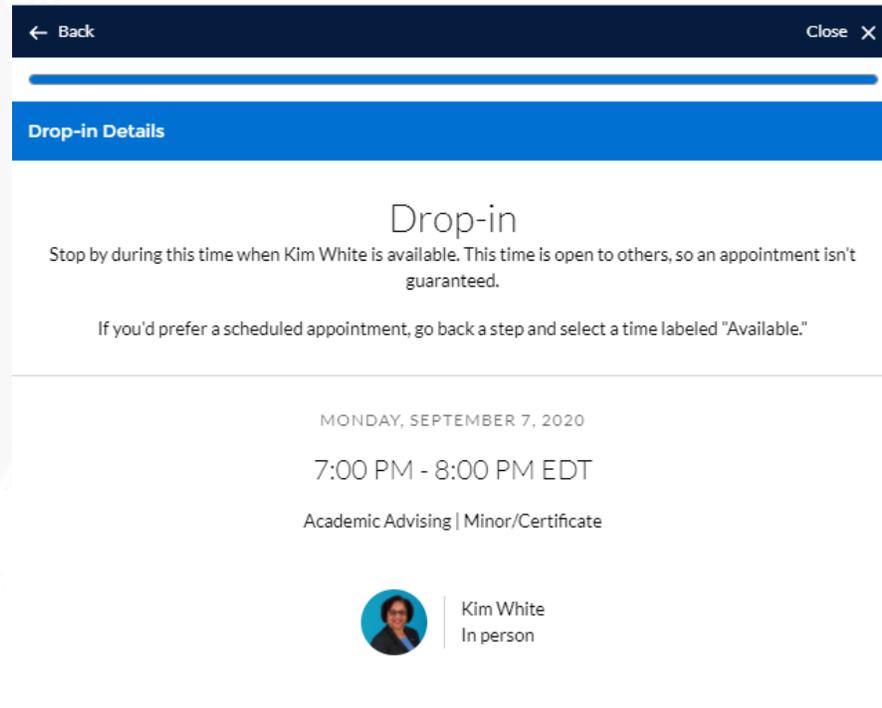


- You can cancel or schedule an appointment
- When cancelling, please share the reason.
- The cancelled appointment will be stored in you cancelled appointment history.



Student Community View: Drop-in Appointments

- Some departments support Drop-in Appointments. You can schedule a drop-in appointment. To secure the appointment, you will need to schedule at their Kiosk location.



Student Community View: Kiosk - Checking In

I'm here for myself

Attendee Information

* Student Name

Student ID

Back Next

- Choose a Walk-In Option
 - I'm here for Myself
 - I'm here for someone else
- Select a Topic & Subtopic
- Enter Comments
- Press "Join Queue"

I'm here for myself

✓ You're Checked In

Close

I'm here for myself

Attendee Information

* Student Name

Student ID

Back Next

I'm here for myself

Agenda

* Topic

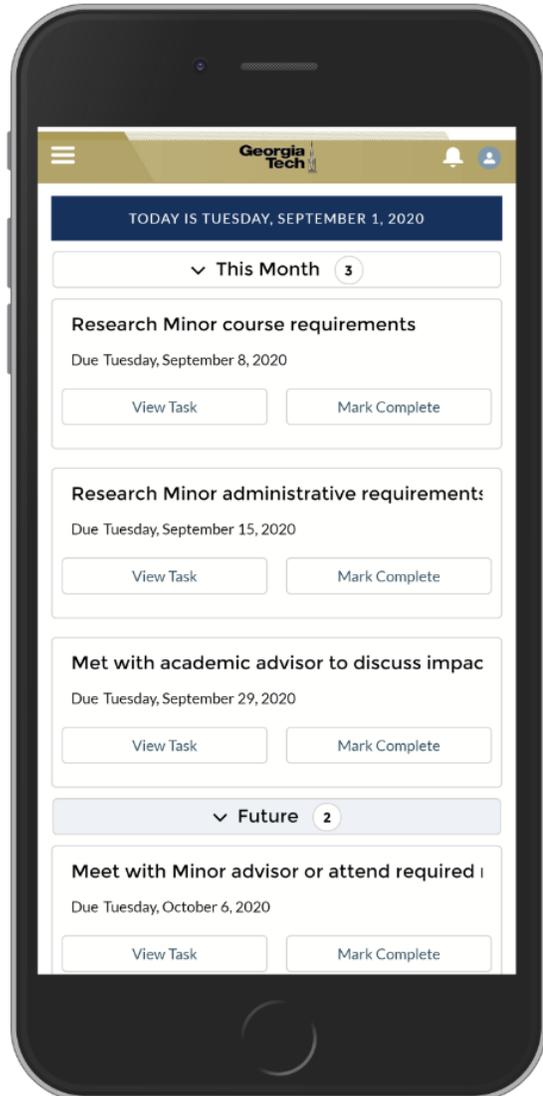
* Subtopic

Comments

Back Join Queue

Student Community: View Your Assigned Tasks

- You can select “My Tasks” from the navigation bar to display your list of upcoming or overdue due tasks to keep track of your success plans.
- This will help you stay on top of important tasks assigned by your advisor



<input type="checkbox"/>	Subject	Success Plan	Status	Priority	Due Date	
<input type="checkbox"/>	Research Minor course requirements	Adding a Minor	Open	Normal	9/8/2020	▼
<input type="checkbox"/>	Research Minor administrative requi...	Adding a Minor	Open	Normal	9/15/2020	▼
<input type="checkbox"/>	Met with academic advisor to discuss...	Adding a Minor	Open	Normal	9/29/2020	▼
▼ Future 2						
<input type="checkbox"/>	Subject	Success Plan	Status	Priority	Due Date	
<input type="checkbox"/>	Meet with Minor advisor or attend re...	Adding a Minor	Open	Normal	10/6/2020	▼
<input type="checkbox"/>	Obtain signatures and submit to Offic...	Adding a Minor	Open	Normal	10/11/2020	▼

Student Community: View Your Success Plans

Georgia Tech

Home **My Success Plans** My Tasks

SUCCESS PLANS
My Success Plans

TODAY IS TUESDAY, SEPTEMBER 1, 2020

▼ Academic 1

▼ Adding a Minor 5 OF 5 TASKS REMAINING

Progress

<input type="checkbox"/> Subject	<input type="checkbox"/> Status	<input type="checkbox"/> Priority	<input type="checkbox"/> Due Date	
<input type="checkbox"/> Research Minor course requirements	Open	Normal	9/8/2020	▼
<input type="checkbox"/> Research Minor administrative requirements	Open	Normal	9/15/2020	▼
<input type="checkbox"/> Met with academic advisor to discuss impact on grad pathway	Open	Normal	9/29/2020	▼
<input type="checkbox"/> Meet with Minor advisor or attend required meeting for Minor	Open	Normal	10/6/2020	▼
<input type="checkbox"/> Obtain signatures and submit to Office of the Registrar	Open	Normal	10/11/2020	▼

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- View your assigned “Success Plan” from the navigation bar.
- This will help you achieve your goals and stay on top of activities designed to meet your academic progress and needs. You can be assigned a success plan or help build one with your advisor’s support.



Support Resources

Get Help After Go-Live: September 14

On 9/14/2020, Advisor Link will be in production and support will be provided using the Georgia Tech Enterprise Service Desk powered by ServiceNow:

- Access services.gatech.edu
 - Choose the “Teaching and Learning” tile
 - Select “Advising Platform (Advising Resources and Support for Advisors & Students)”
 - Then, complete the support form.
- Support will be directed to:

Functional Support (OUE or GTPE)

Examples: I need help locating my advisee’s contact or case record, program, or applying a success plan, updating my availability, etc.

Technical Support (OUE, GTPE or OIT)

Examples: I can’t log into the Student Community Portal or Advisor Interface, or I don’t have access to success plan templates, I’m getting the following error message, etc.

- We will be adding knowledge articles continuously to provide better information for user self-service.

PSA: Emailing from Advisor Link

- Email sent from Advisor Link is guaranteed to be delivered to your official Georgia Tech mailbox
- Students may “Store and Forward” their email to a 3rd party email provider, such as Gmail, Yahoo, etc.
- Please be sure to periodically check your Junk and Spam folders to train other mail provider’s filtering software to accept mail sent from *@gatech.edu mail addresses by marking the 3rd party mail “Not Junk/Spam” to avoid missing important forwarded email.

Key Dates to Remember

- **GradesFirst Freeze Date: Friday, September 11**
 - Read Only Mode
 - Appointment History, Notes and Attached Documents will be migrated
- **ADVISOR LINK Goes Live: Monday, September 14**
 - All student advising will be conducted using advisor link



Thank You!