Advisor Link Training

September 1, 2020
Agenda

• Advisor Link Overview
• Advisor Interface
• Student Community view
  • Browser & Mobile views included
• Support
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 Yarney, Lisa Barrien, Karen Ruehlman, Sidartha Rakuram, Jackson Caruso, Brielle Lonsberry

Service Management
• Andrew Jarrett
• Russell Wallis

Project Management
• Kim Wynn White
• Sherise Reaves

Communications / Procurement
• Malynda Dorsey
• Teresa Holcomb
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

INITIATION PHASE
June 2019 – Jan 2020

PLANNING PHASE
Feb – April 2020

EXECUTION PHASE
May – August 2020

DELIVERY PHASE
Aug – Sept 2020

CLOSURE PHASE
Sept – Nov 2020

Initiation
Planning
Execution
Delivery
Closure

Advisor Training
Aug 24 – Sept 10

Student Demo & Communications
Sept 1 – Sept 11
## Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
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<tr>
<td>Advisee Record (Case)</td>
<td>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 &quot;advisee record.&quot;</td>
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<td>Success Team</td>
<td>A team of people serving in advising roles for an advisee. Success teams can consist of both Contacts and Users.</td>
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<tr>
<td>Community</td>
<td>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.</td>
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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.

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

List Of Tasks Assigned By Date

View Your Appointment History

See List Scheduled Appointments

See List of Your Success Team

See Notifications And Log Out From Your User Icon

Schedule An Appointment

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.
● 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

![Appointment Scheduling Interface](image)
● **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!
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 your cancelled appointment history.
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.
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”
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.
● 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
On 9/14/2020, Advisor Link will 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!