



Use Case List Views to focus advising on smaller populations of your advisees.

We can focus your view of advisees by providing filtered lists of students. These filtered lists are called Case List Views. Case List Views will show all students that are in your predefined caseload and students that you have manually added to their team. We currently have several defined views to help you monitor and stay in contact with your students. Some examples of Case List Views are GPA below 2.2, GPA below 2.5, Advisees with more than 1 U, By Academic Standing, By Class Standing, and Primary Minor.

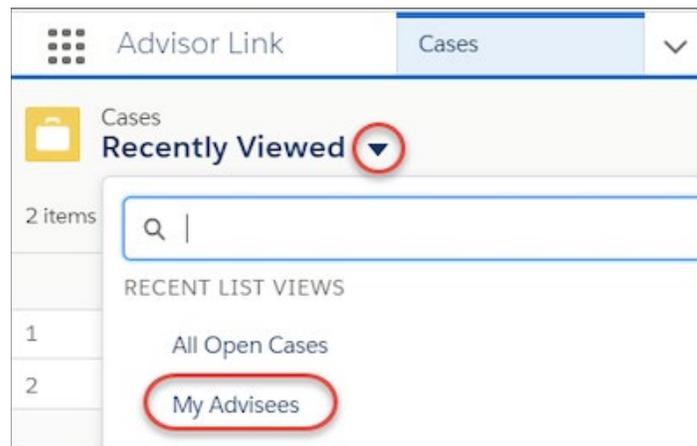
Access Case List Views

- Click the app navigation menu arrow and select **Cases**.





- Click the list view menu arrow and select a list of advisee records, such as My Advisees.



- Note: The list views that are specific to your advisees all start with “My Advisee. . .” and maybe toward the bottom of the list until you click on them the first time.

Navigating a Case List View:

- Sort columns by clicking on the column header.

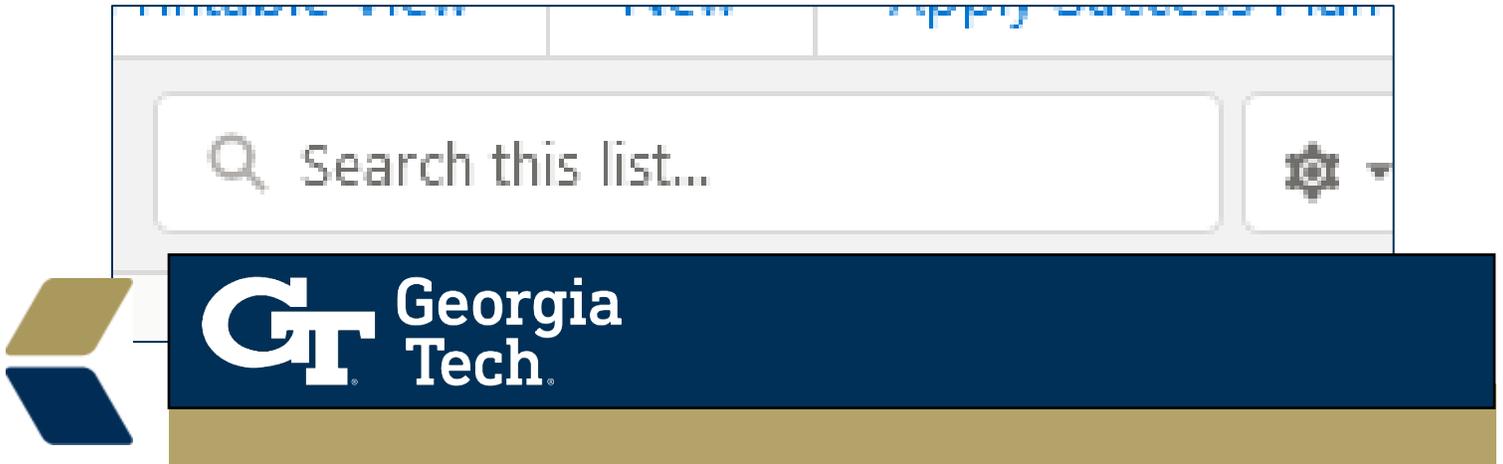
First Name	Last Name
Sofia	Advisee Student Test
George	Burdell



- Navigate to the Advisee's Case Record by clicking on the Case Number.

Cases	
My Advisees	
2 items • Sorted by Case Number • Filtered	
	CASE NUMBER
1	00001026
2	00001027

- Search for an advisee using the search field located top right.

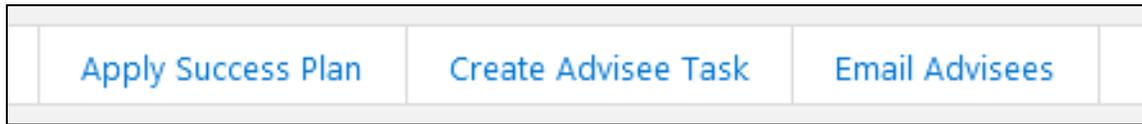


Apply actions to single or multiple cases. Apply Success Plan, Create Advisee Task, Email Advisees

- Select records by clicking the check box to the left of each record or select the checkbox at the top of the column to select all records.

items selected	
	<input checked="" type="checkbox"/> Case N
1	<input checked="" type="checkbox"/> 001356
2	<input checked="" type="checkbox"/> 002617

- Choose the action to apply to the selected records.



- Success Plans are a series of Advisee Tasks
- Advisee Task
 - Assigning a Task generates an email to the student
 - The task shows in the student view when they log into Advisor Link
 - Tasks can generate a reminder to the student
 - The comments section of a task will accommodate a weblink
 - Task completion is self-reported by the student
- Email Advisees allow the advisor to form a message to multiple students at one time and send messages that look individualized (See screenshots below).



**Georgia
Tech**

Below you will find Screenshots for **Create Advisee Task**, **Email Advisees**, and of the student's view of their Advisor Link Experience.

After you click on Create Advisee Task you will get a blank New Task form



New Task

1 Advisee Selected

* Subject

* Priority

-- Select One --

* Status

-- Select One --

* Due Date



Comments

Repeat this task

Set reminder



GT Georgia
Tech

Form filled

 New Task

1 Advisee Selected

* Subject

* Priority

* Status

* Due Date

Comments

Repeat this task
 Set reminder

* Reminder Date and Time
Date: Time:



View of email generated when a task is assigned to a student (Note – For testing, George Burdell has Russell’s email address)

Contact your advisor

 **Russell Wallis**
Wed 9/22/2021 8:03 AM
To: Wallis, Russell

New Task

To: George Burdell

Russell Wallis has assigned you the following new task:

Subject: Contact your advisor
Contact: George Burdell
Case: 00261767
Due Date: 9/24/2021
Priority: Normal
Comments: Contact your advisor

<https://www.google.com>

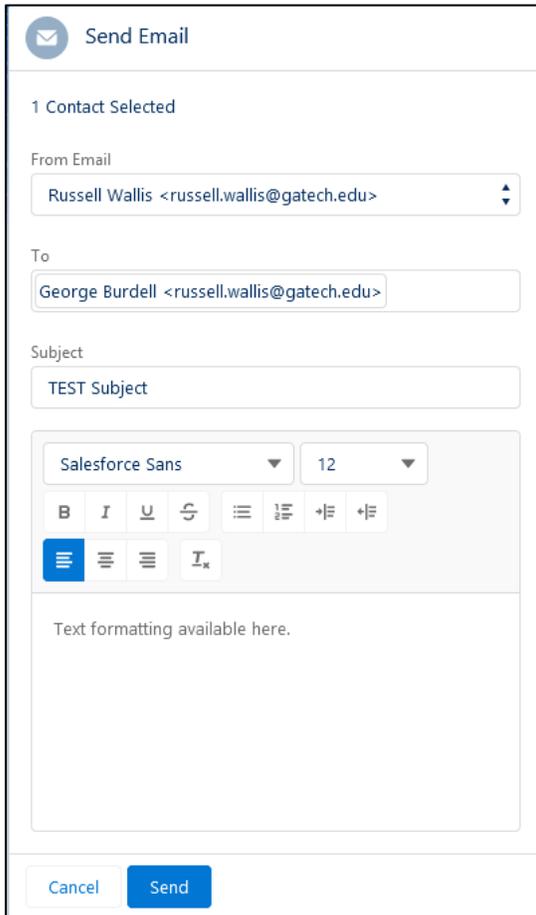
For more details, click the following link:

<https://advisor.gatech.edu/00T1K00004H3qfI>

Reply | Forward

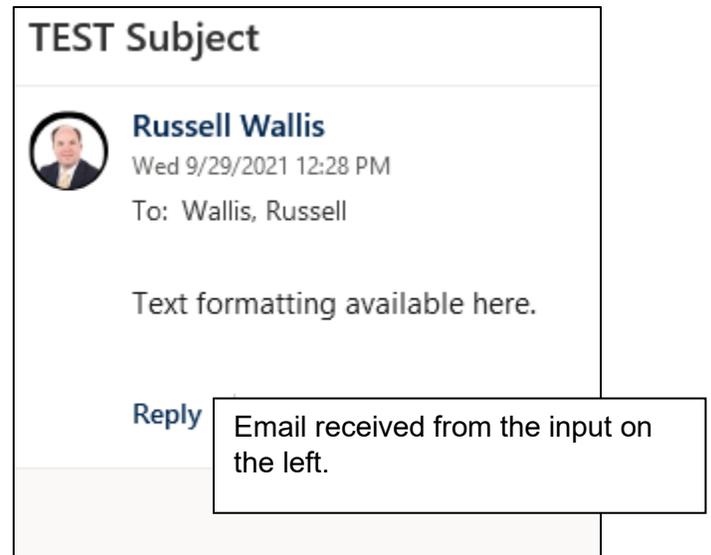


When the **Email Advisee** action button is clicked the Send Email form is provided.



The screenshot shows a 'Send Email' form with the following fields and options:

- From Email:** Russell Wallis <russell.wallis@gatech.edu>
- To:** George Burdell <russell.wallis@gatech.edu>
- Subject:** TEST Subject
- Formatting:** Salesforce Sans font, size 12. Rich text toolbar includes Bold (B), Italic (I), Underline (U), Link (G), Bulleted List, Numbered List, Indent, and Outdent. A 'Text' icon is also present.
- Text Area:** Contains the placeholder text 'Text formatting available here.'
- Buttons:** Cancel and Send.

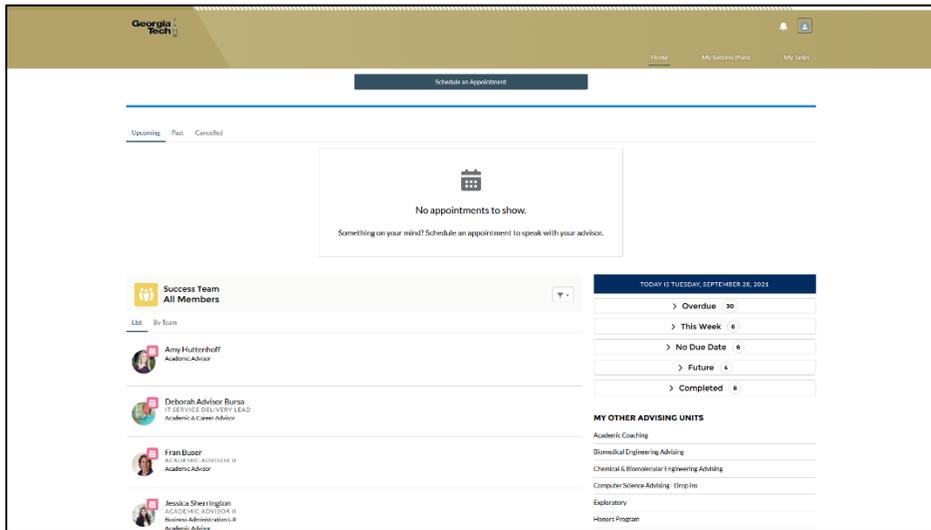


The screenshot shows an email preview card with the following details:

- Subject:** TEST Subject
- Sender:** Russell Wallis (with profile picture)
- Date:** Wed 9/29/2021 12:28 PM
- To:** Wallis, Russell
- Body:** Text formatting available here.
- Action:** Reply button.
- Annotation:** A callout box points to the Reply button with the text: 'Email received from the input on the left.'



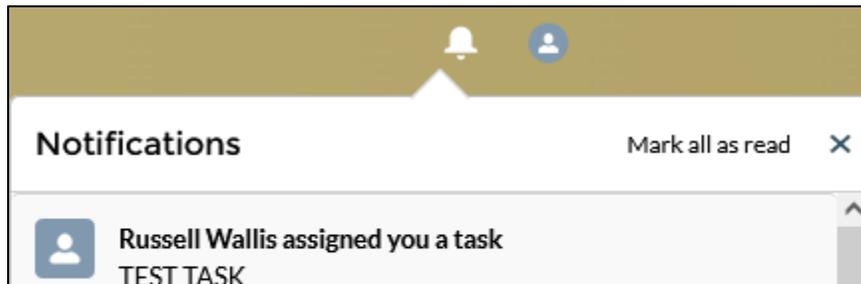
View of student's Advisor Link Experience – George Burdell. Screenshots are provided in the event that a student needs direction in their environment.



Student has a task added – The students get a notification.



Student's task is listed



**Georgia
Tech**

Where the student will mark the task as complete. This is self-reported.

 Task
TEST TASK

Name George Burdell Related To 00261767

▼ **Task Information**

Subject	<u>TEST TASK</u>	Type	<u></u>
Assigned To	 <u>George Burdell</u>	Reminder Set	<u>Sep 29, 2021 at 1:50 pm</u>
Name	<u>George Burdell</u>	Due Date	<u>9/30/2021</u>
		Related To	<u>00261767</u>
Comments	<u>TEST Comment</u>		
	<u>https://www.gatech.edu</u>		

▼ **Additional Information**

Priority
Normal

Status
Open