Georgia Tech

Overview of Advisor Link's Flex Scheduling Functionality

Summary of contents:

What is Flex Scheduling?

The new Flex Scheduling functionality includes enhancements to managing the **locations** where you provide advising as well as the seasonal aspects of advising on certain **topics and sub-topics**.

Location-based Availability:

https://powerofus.force.com/s/article/SAL-Set-Up-Location-Based-Advising-Availability

Location-based availability allows advisors to designate blocks of time to meet with students, and associate those availability blocks with one or more locations. For example, say an academic advisor, Adrian Morges, works from home three days a week. When he's home, he can meet with advisees by phone (his mobile phone) and virtually, using the university's approved web-conferencing tool. One day a week he's on campus, where he can meet with advisees in-person in his office, by phone (his office or his mobile phone), or virtually. And on Fridays, he has to juggle childcare and he never knows where he'll be, so scheduled appointments must be voice calls on his mobile phone. Adrian and advisors like him rely on the flexible scheduling made possible by associating their availability with specific locations—including virtual locations.

Topic-based Availability:

https://powerofus.force.com/s/article/SAL-Set-Up-Topic-Based-Advising-Availability

No one likes to talk about Christmas in June, and advisors typically don't advise about graduation audits in September. Help advisors optimize their scheduling through the seasons by using **Topic-based availability**, which lets them associate their recurring availability blocks with appointment Topics and Subtopics.

For example, advisors can set up a recurring block during August and September dedicated to scheduling, and a different block for March through May dedicated to graduation audits. They can add additional Topics to those availability blocks as desired, so they can also be available to discuss study abroad planning, for example, whenever it's a hot topic with advisees.

What is Changing in the Advisor Link Interface?

The primary change for Advisors will be in how they set up their Appointment Availability.

The **Current Location Setting feature is one text field** in which you define everything that the Student needs to know about the location.

LOCATION SETTINGS

*Appointment Locations ⓘ

Where you meet with advisees. For example, "Porter Hall 1113B" or "By phone: (310) 555-1131"

In person: Coda Building, 10th Floor	Remove
By phone: 404 385 2550	Remove
Web Meeting: Teams Meeting https://something.com	Remove
	Remove

Add A Location

The **new Location functionality** provides a more structured way to **define location attributes by type of location: In-Person, Phone, Virtual, and Other**. See screenshots below for the fields associated with each type.

New Appointment Location

Basics

*Type
Virtual ▼

Name ⓘ

Details

Meeting Link

Additional Details

New Appointment Location

Basics

*Type
Other ▼

Name ⓘ

Details

Additional Details

The

abi

bel

The **current** Availability setup screen:

New Availability

Available For

-- Select One --

← Appears on Advisor Calendar ONLY

Subject ⓘ

← Available or Drop-in

TIMES (EASTERN STANDARD TIME)

Start Time

End Time

The

REPEAT ON

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

← No mention of Topic or Location for the Availability time period

REPEAT EVERY

1

weeks

RECURRENCE DURATION

Start On

Feb 2, 2021

End On

Cancel   Save

Georgia Tech.

The **new** Availability setup screen:

Appears on Advisor Calendar ONLY

Available, Drop-in, or Group

New Availability

Basics

Subject ⓘ

Type
-- Select One --

Topic ⓘ
All Topics (By Default)

Location ⓘ
All Locations (By Default)

Date and Time

Start Date
Feb 2, 2021

End Date

Select one or more Topics you are available to discuss during this time period – defaults to All Topics

Start Time

End Time

Select one or more locations where you are available to meet during this time period for the selected Topics – default to All Locations

Recurrence

REPEAT EVERY

1   weeks   Mon   Tue   Wed   Thu

Cancel   Save

From the Student's perspective, there will not be much change in the appointment scheduling experience.

Example of the **current** Student appointment scheduling screen, which shows the text defined in the Location field:

Where would you like to meet?

By phone   >

Web Meeting   >

From here, the student selects the topic that he/she wants to discuss. Once scheduled, the basic information appears on the Student's Home page of Advisor Link.

SCHEDULED APPOINTMENT

Academic Planning

TUESDAY, NOVEMBER 3, 2020
2:30 PM to 2:55 PM

Leslie Ross
WEB MEETING

With the **new Flex Scheduling functionality**, the Student will select their advising topic of interest and then will see which locations are available by time period.

When would you like to meet?

May 2021

Tuesday, May 18, 2021

1:00 PM - 1:30 PM EDT
AVAILABLE
IN PERSON | PHONE | VIRTUAL

1:35 PM - 2:05 PM EDT
AVAILABLE
IN PERSON | PHONE | VIRTUAL

Where would you like to meet?
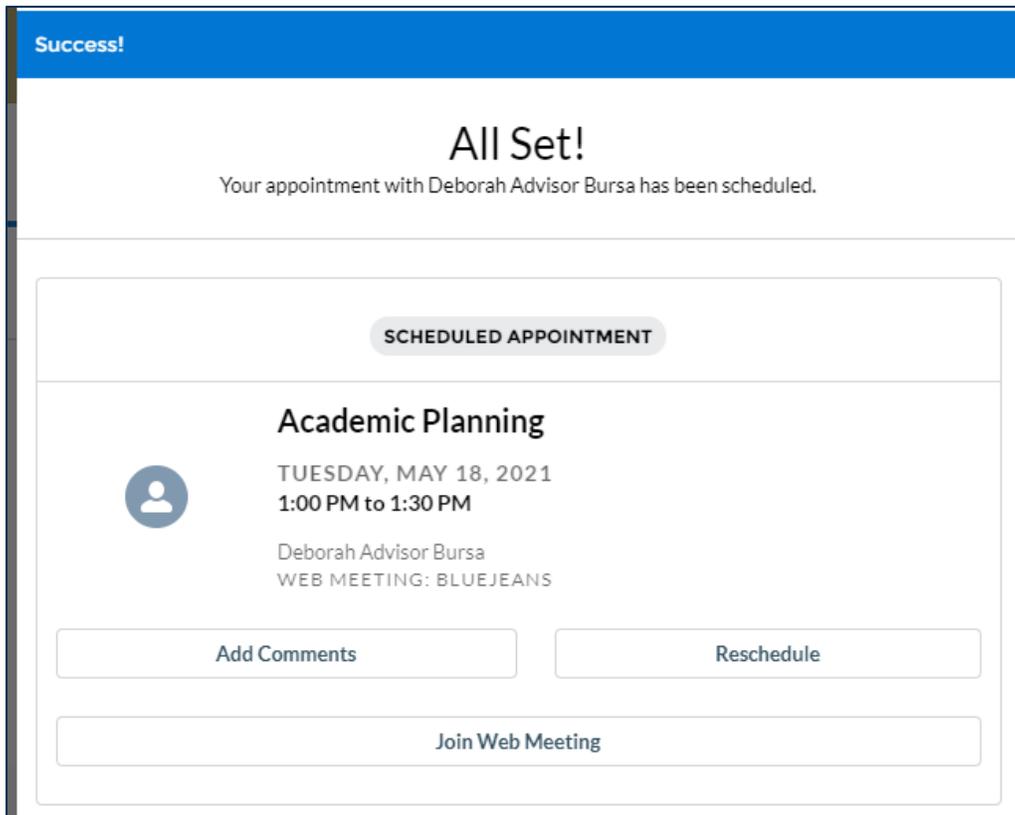
In Person
Atlanta
Coda Building Room 1015

Phone
My Office Phone
404 385 2550
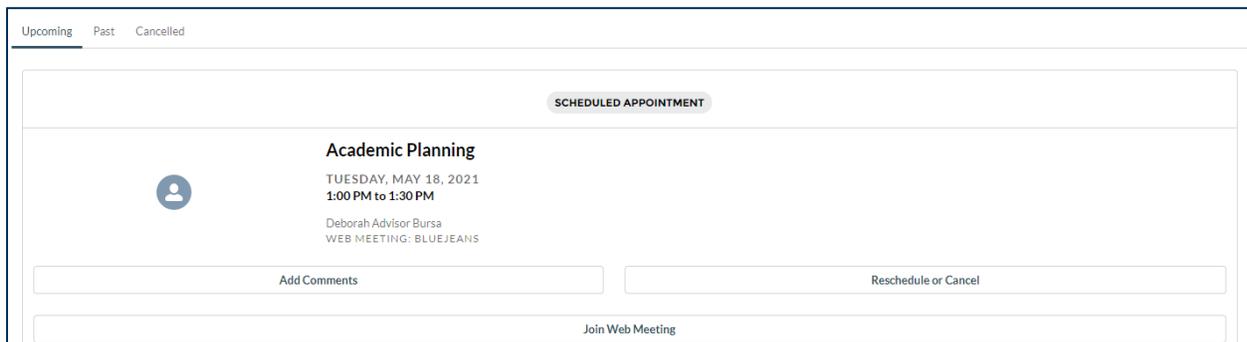
Virtual
Web Meeting: Bluejeans

Similar information appears in the Advisor Link Community.

The **Confirmation page**:

The Student's **Home page** in the Advisor Link Community:

Note the **Join Web Meeting** button that appears on the Home page for Virtual appointments, which allows the Student to access the web meeting link directly from the Community.

Overview of New Custom Appointment Emails

As part of rolling our Flex Scheduling, the OIT Salesforce Team developed custom confirmation and reminder emails that are sent to the Student and the Advisor.

Example of <mark>Confirmation Email sent to Advisor</mark> (sent immediately after appointment is booked):

Scheduled: Appointment with Kieran Black

Appointment Scheduled

Your appointment with Kieran Black has been scheduled.

Student's Name: Black, Kieran
Student's Email: deborah.bursa@oit.gatech.edu

Start Time: 6/4/2021 3:30 PM
End Time: 6/4/2021 4:00 PM
Location: Web Meeting: Bluejeans
Web Meeting Link: https://bluejeans.com/myroom

Topic: Academic Advising
Subtopic: Change of Major

View this Student's Advisee Record

Additional Details:
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Augue ut lectus arcu bibendum. Vel eros donec ac odio tempor. A arcu cursus vitae congue mauris rhoncus aenean. Amet consectetur adipiscing elit ut aliquam. Id interdum velit laoreet id. Dolor sit amet consectetur adipiscing. Consectetur adipiscing elit pellentesque habitant morbi tristique senectus. Donec ac odio tempor orci dapibus ultrices. Praesent elementum facilisis leo vel fringilla est ullamcorper. At urna condimentum mattis pellentesque id nibh tortor. Sem et tortor consequat id porta nibh venenatis. Tellus cras adipiscing enim eu turpis egestas pretium aenean pharetra. Justo eget magna fermentum iaculis eu non diam phasellus. Natoque penatibus et magnis dis parturient. Risus quis varius quam quisque id diam vel quam elementum. Lectus urna duis convallis convallis tellus id interdum velit laoreet. Risus viverra adipiscing at in tellus integer feugiat sce

Georgia Tech

Scheduled: Appointment with Deborah Advisor Bursa

Appointment Scheduled

Your appointment with Deborah Advisor Bursa has been scheduled.

Advisor: Deborah Advisor Bursa
Start Time: 6/4/2021 3:30 PM
End Time: 6/4/2021 4:00 PM
Location: Web Meeting: Bluejeans
Web Meeting Link: https://bluejeans.com/myroom

Topic: Academic Advising
Subtopic: Change of Major

Add to Calendar (Google)
Add to Calendar (Outlook)

If you want to cancel or reschedule, click here
https://advisor.gatech.edu

Additional Details:
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Augue ut lectus arcu bibendum. Vel eros donec ac odio tempor. A arcu cursus vitae congue mauris rhoncus aenean. Amet consectetur adipiscing elit ut aliquam. Id interdum velit laoreet id. Dolor sit amet consectetur adipiscing. Consectetur adipiscing elit pellentesque habitant morbi tristique senectus. Donec ac odio tempor orci dapibus ultrices. Praesent elementum facilisis leo vel fringilla est ullamcorper. At urna condimentum mattis pellentesque id nibh tortor. Sem et tortor consequat id porta nibh venenatis. Tellus cras adipiscing enim eu turpis egestas pretium aenean pharetra. Justo eget magna fermentum iaculis eu non diam phasellus. Natoque penatibus et magnis dis parturient. Risus quis varius quam quisque id diam vel quam elementum. Lectus urna duis convallis convallis tellus id interdum velit laoreet. Risus viverra adipiscing at in tellus integer feugiat sce

Reminder: Appointment with Deborah Bursa

Appointment Reminder

Advisor: Deborah Advisor Bursa
Start Time: 6/2/2021 4:05 PM
End Time: 6/2/2021 4:35 PM
Location: Web Meeting: Bluejeans
Web Meeting Link: https://bluejeans.com/myroom

Topic: Academic Advising
Subtopic: Academic Planning
Appointment Details/Comments:

Add to Calendar (Google)
Add to Calendar (Outlook)

If you want to cancel or reschedule, click here:
https://advisor.gatech.edu

Additional Details:
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Augue ut lectus arcu bibendum. Vel eros donec ac odio tempor. A arcu cursus vitae congue mauris rhoncus aenean. Amet consectetur adipiscing elit ut aliquam. Id interdum velit laoreet id. Dolor sit amet consectetur adipiscing. Consectetur adipiscing elit pellentesque habitant morbi tristique senectus. Donec ac odio tempor orci dapibus ultrices. Praesent elementum facilisis leo vel fringilla est ullamcorper. At urna condimentum mattis pellentesque id nibh tortor. Sem et tortor consequat id porta nibh venenatis. Tellus cras adipiscing enim eu turpis egestas pretium aenean pharetra. Justo eget magna fermentum iaculis eu non diam phasellus. Natoque penatibus et magnis dis parturient. Risus quis varius quam quisque id diam vel quam elementum. Lectus urna duis convallis convallis tellus id interdum velit laoreet. Risus viverra adipiscing at in tellus integer feugiat sce