Advisor Link Training

September 1, 2020

Agenda

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

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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 Varney, 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

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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

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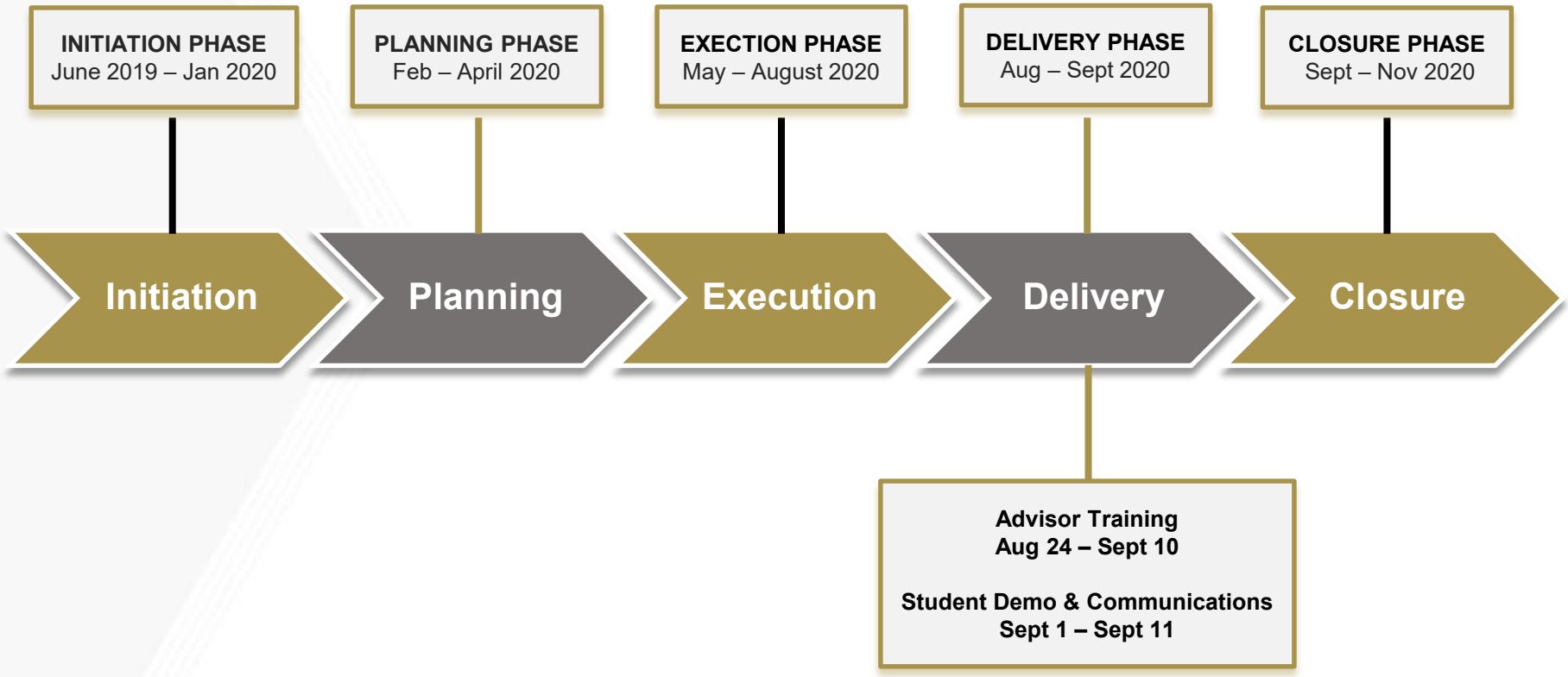
Project Timeline



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FINANCIAL HOUSING ATHLETIC STUDY ABROAD ACADEMIC

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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.

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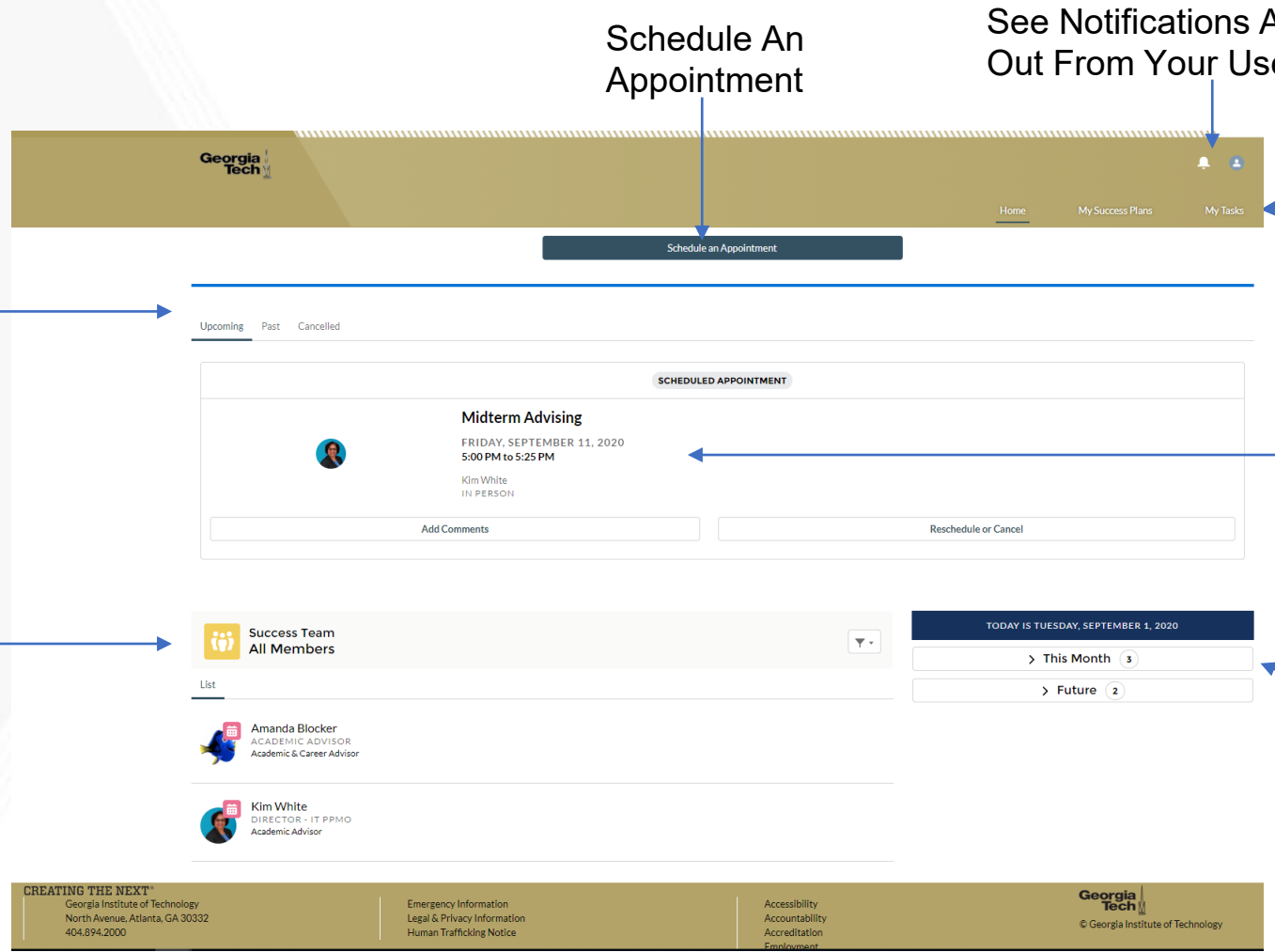
Student Advisor Link Community

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.



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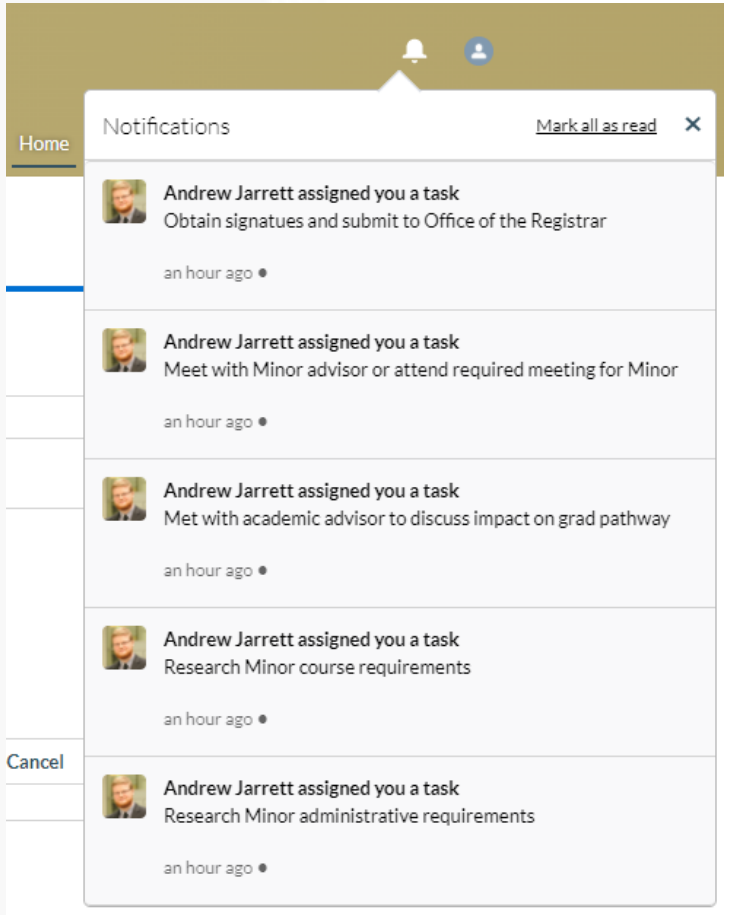
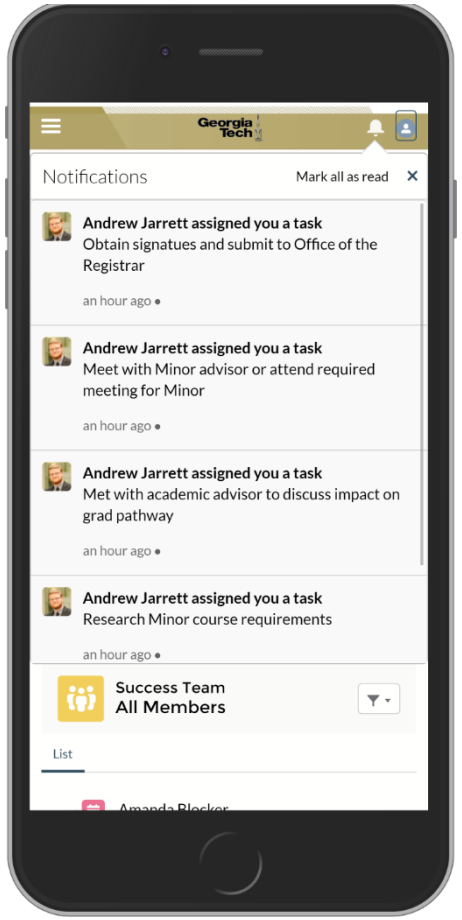
Student Community View: Notification and User Icon

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





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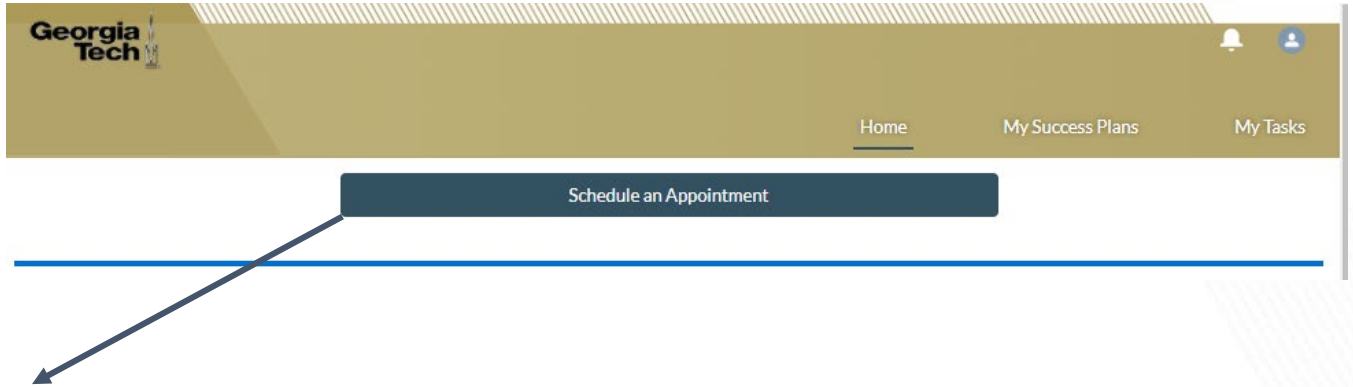
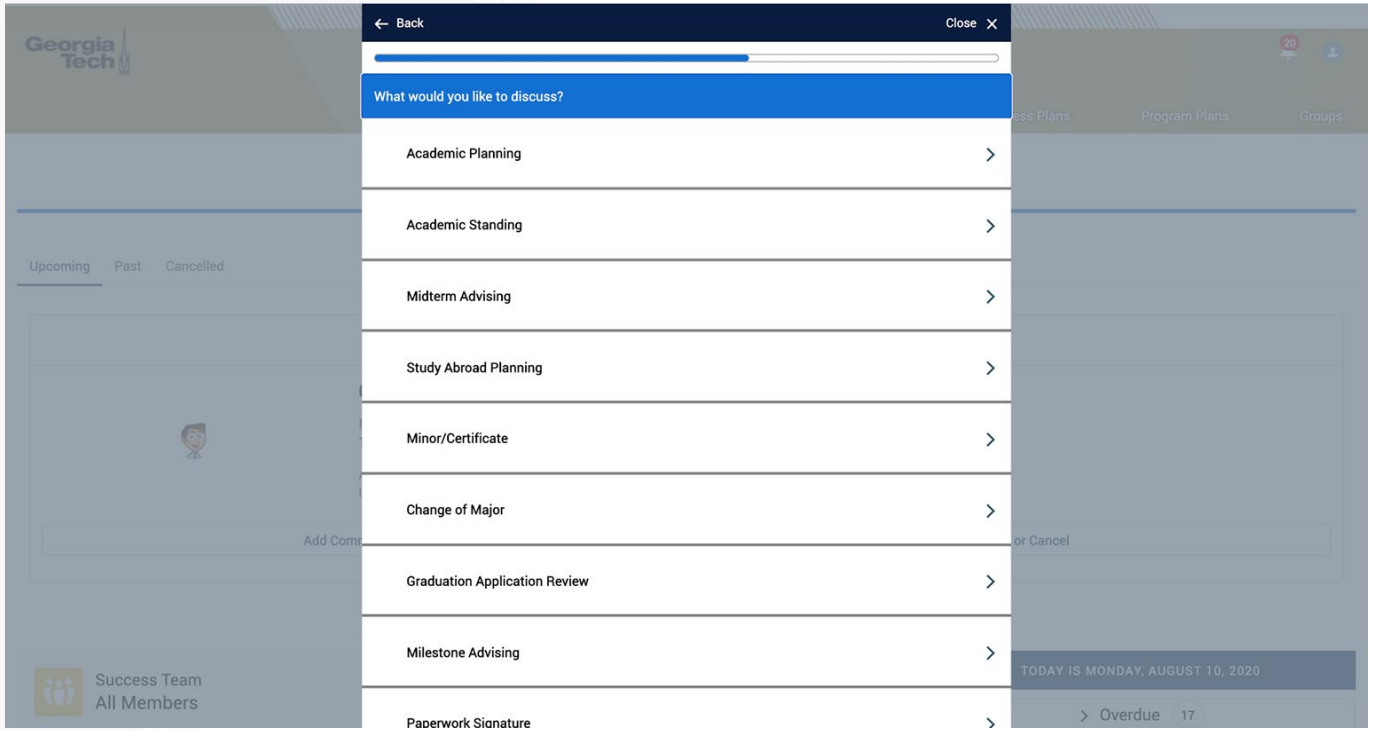
Student Community View: Scheduling an Appointment

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





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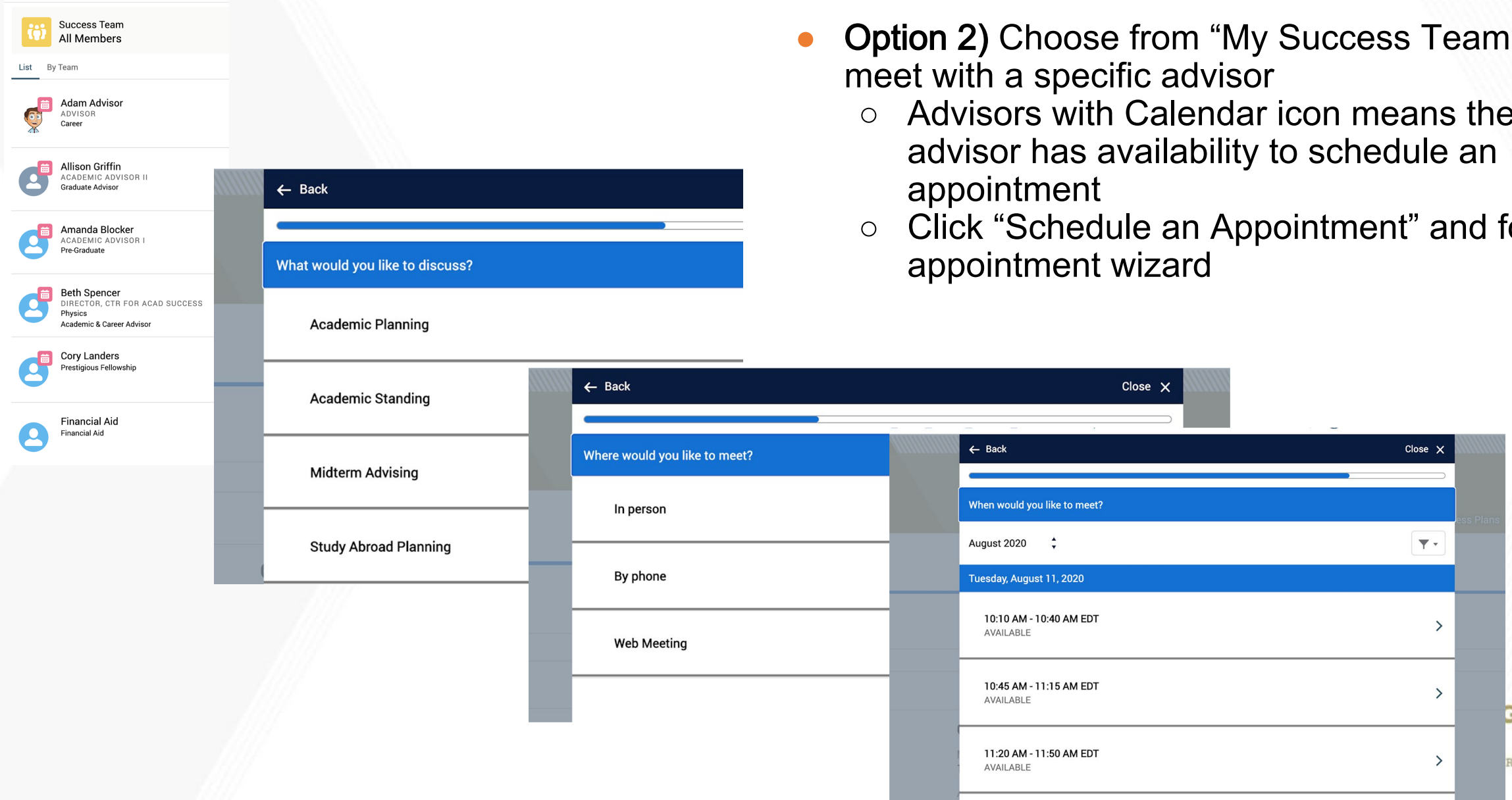
Student Community View: Scheduling an Appointment

- **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



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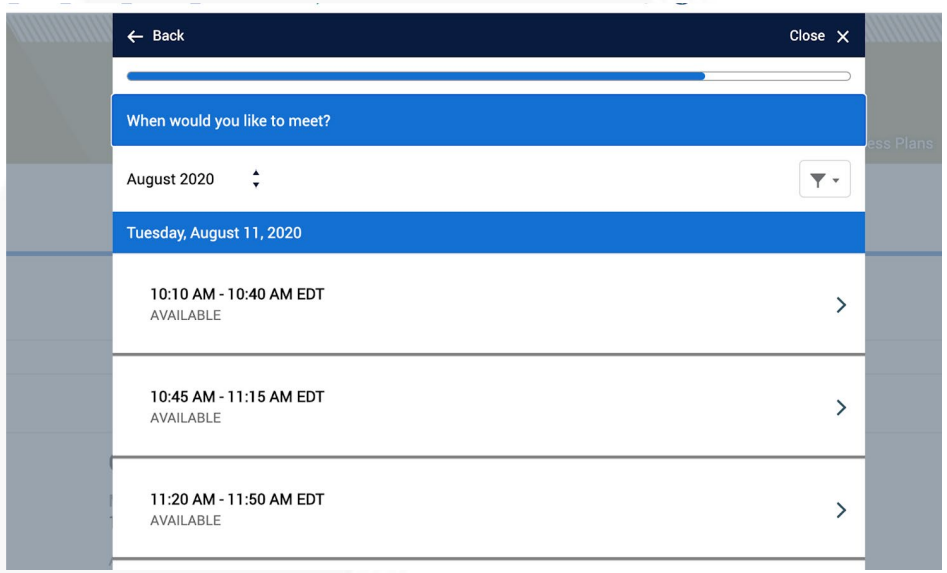
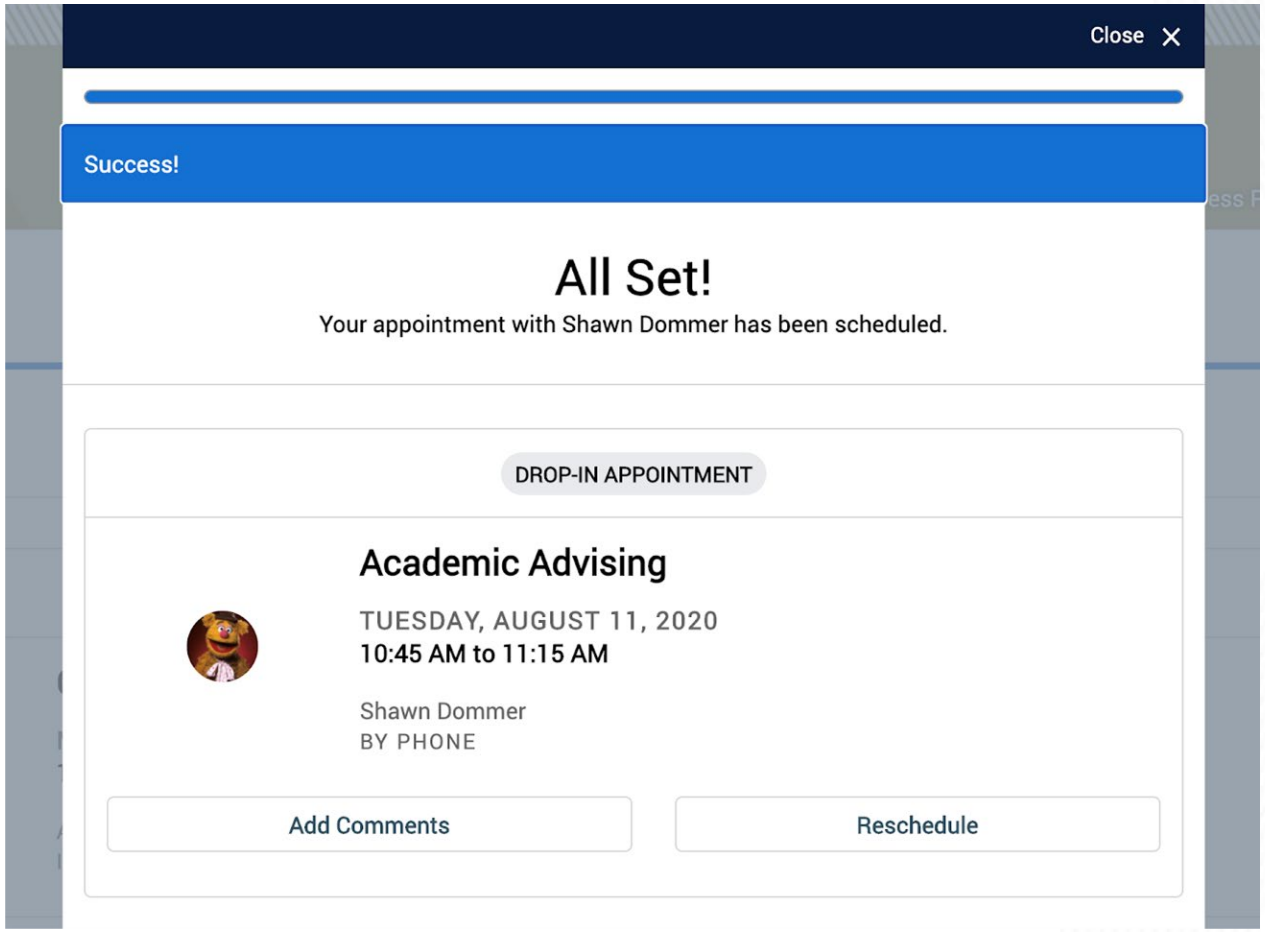
Student Community View: Scheduling an Appointment

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





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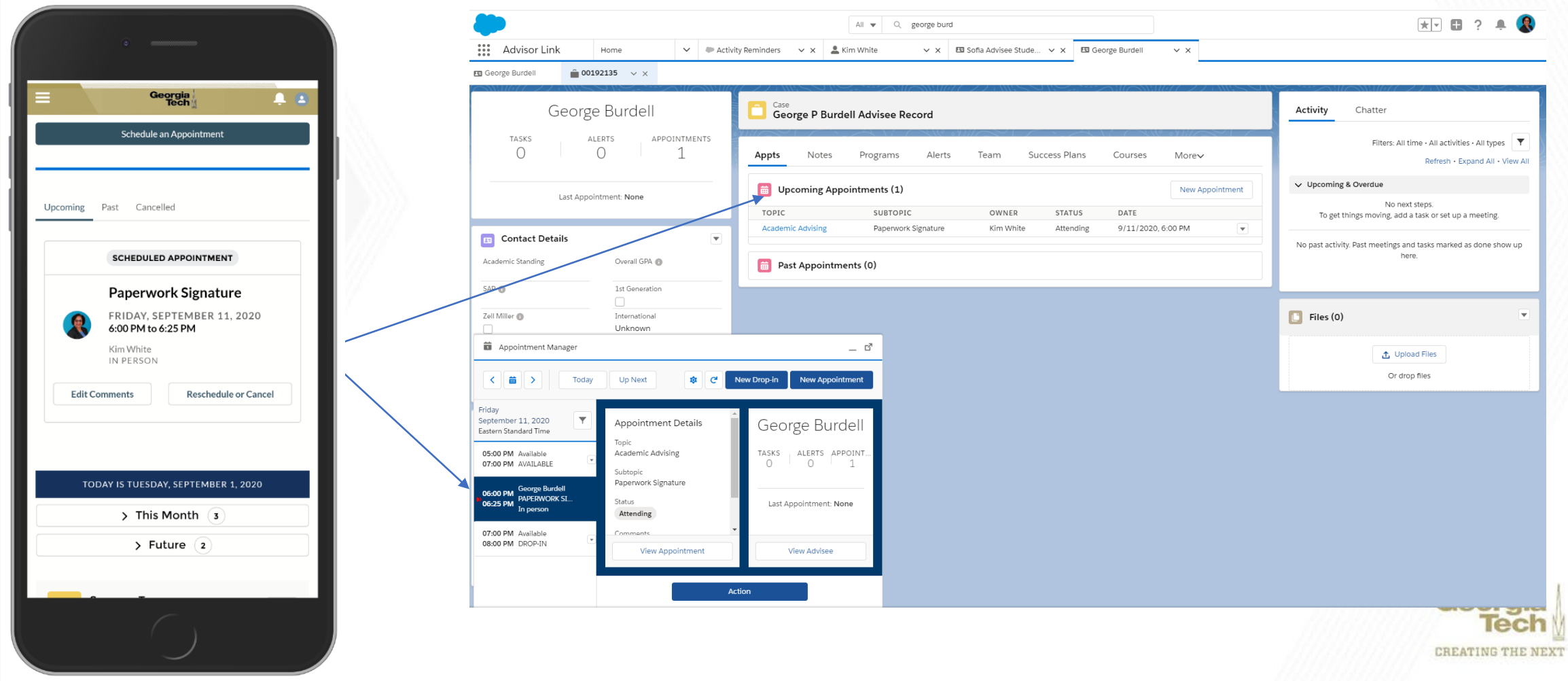
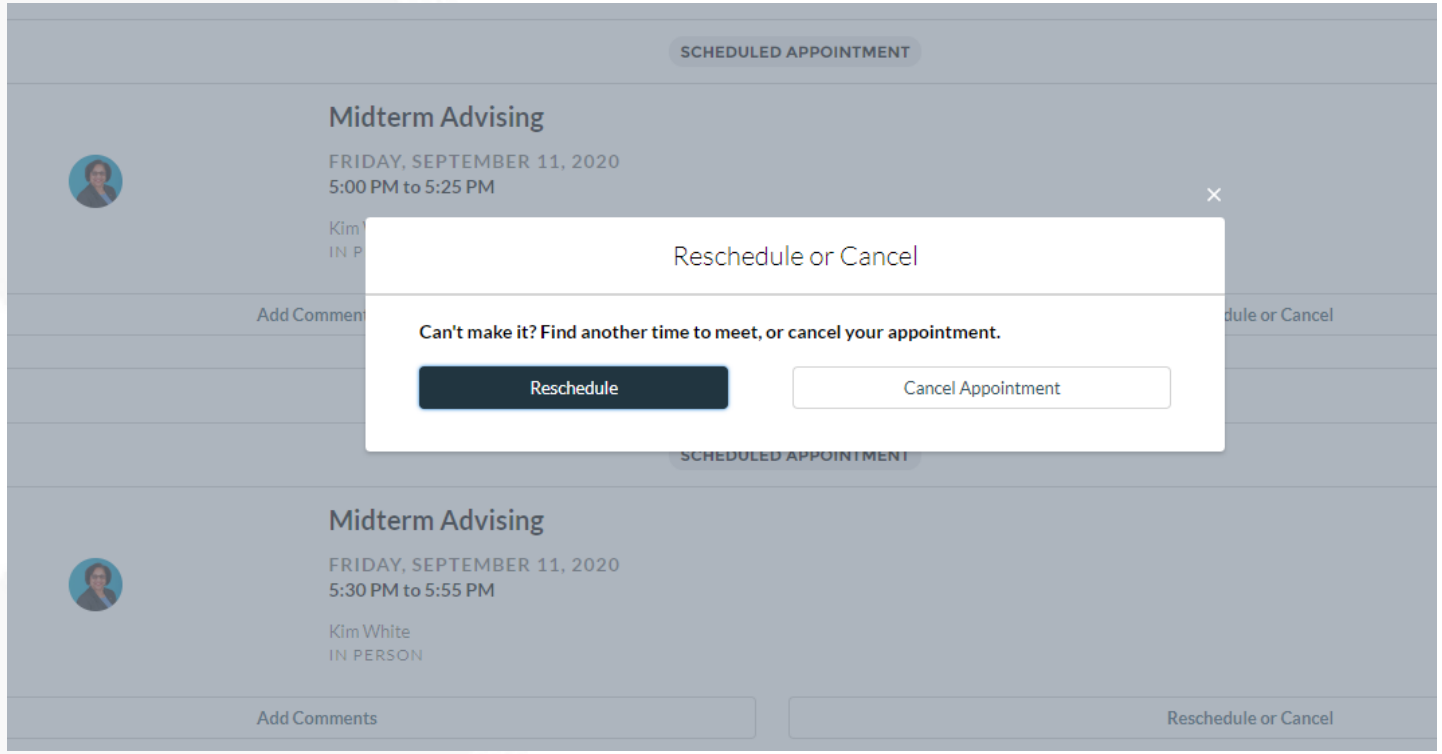
Student Community View: Advisor's Appointment View

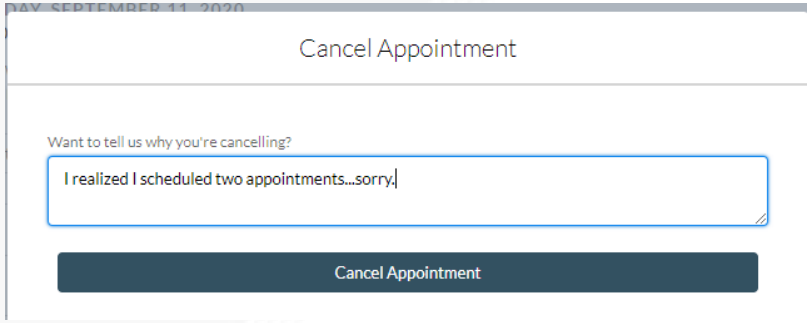
- Your advisor will see the appointment in your case record and in the appointment manager

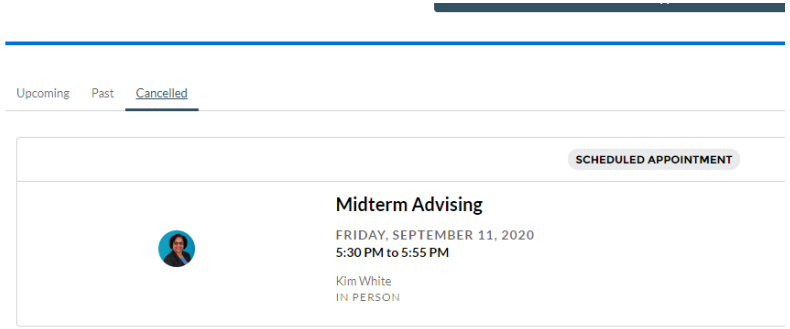


Student Community View: Cancel or Reschedule an Appointment



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





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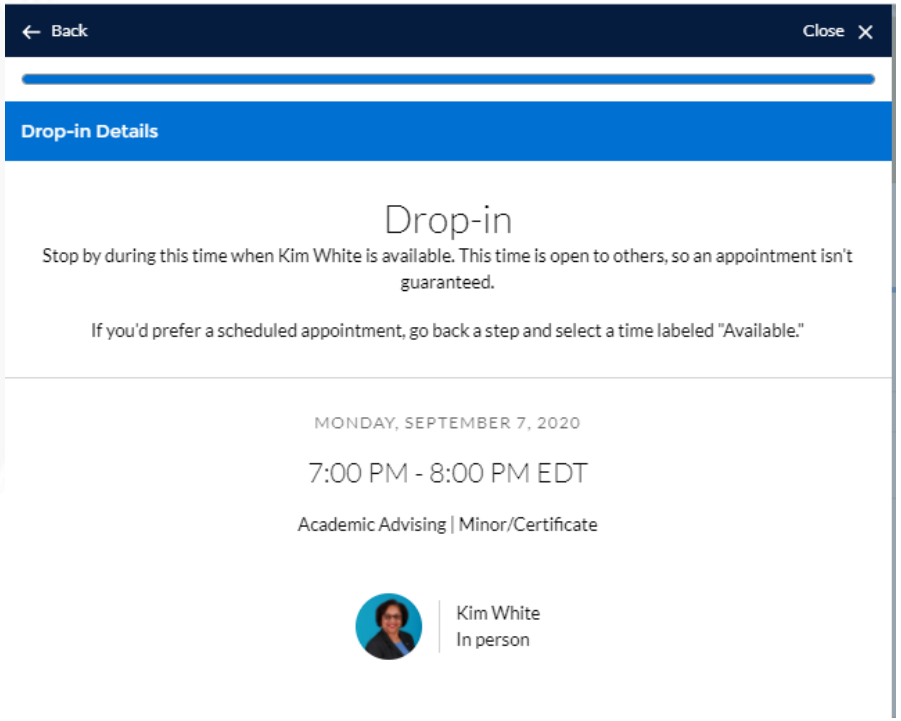
Student Community View: Drop-in Appointments

- 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.



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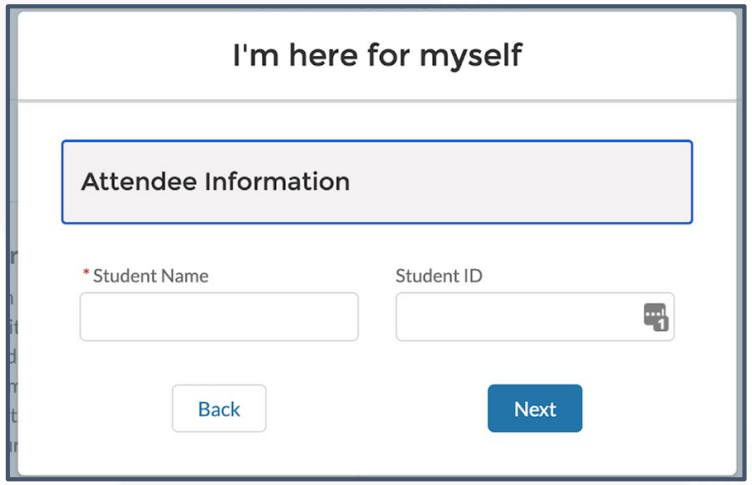
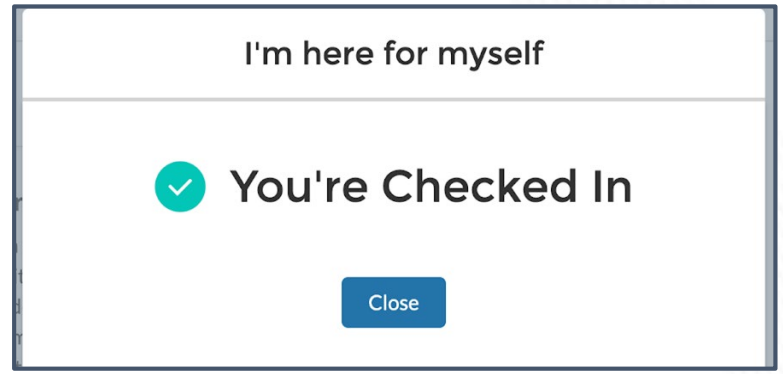
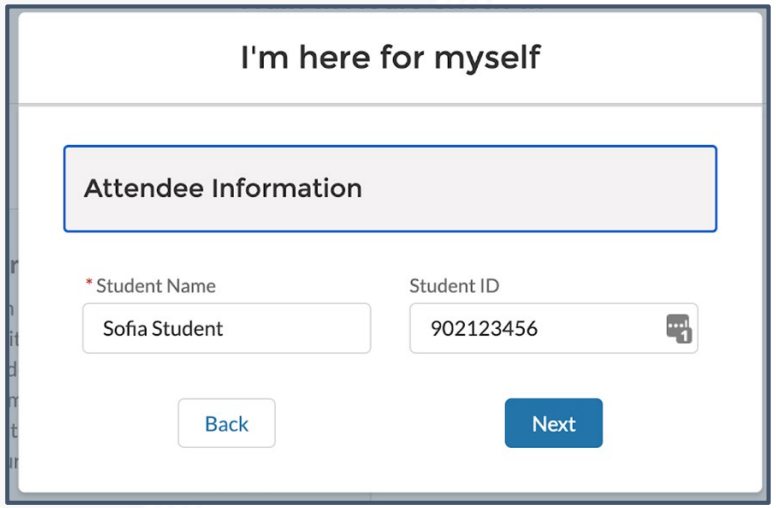
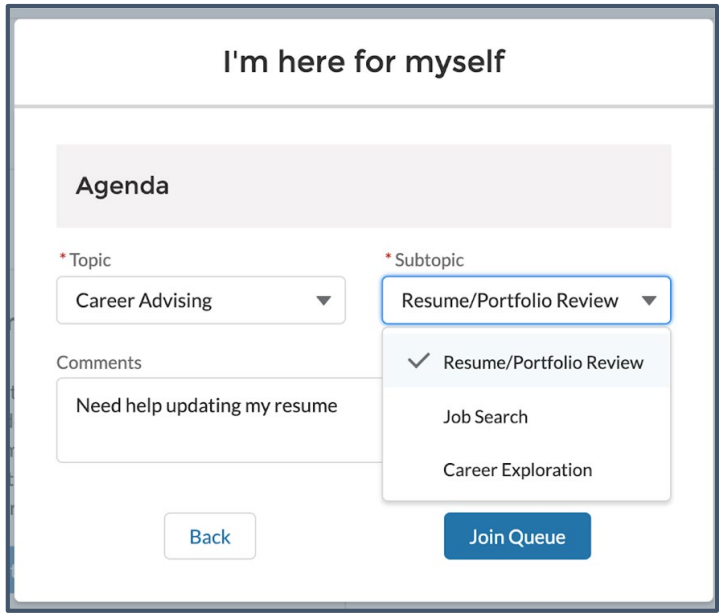
Student Community View: Kiosk - Checking In



- 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







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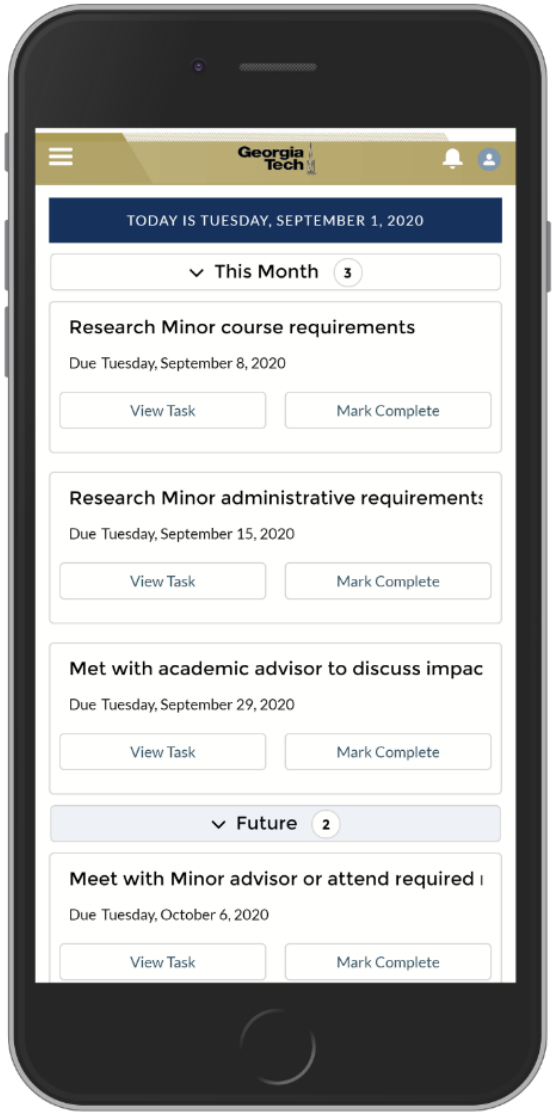
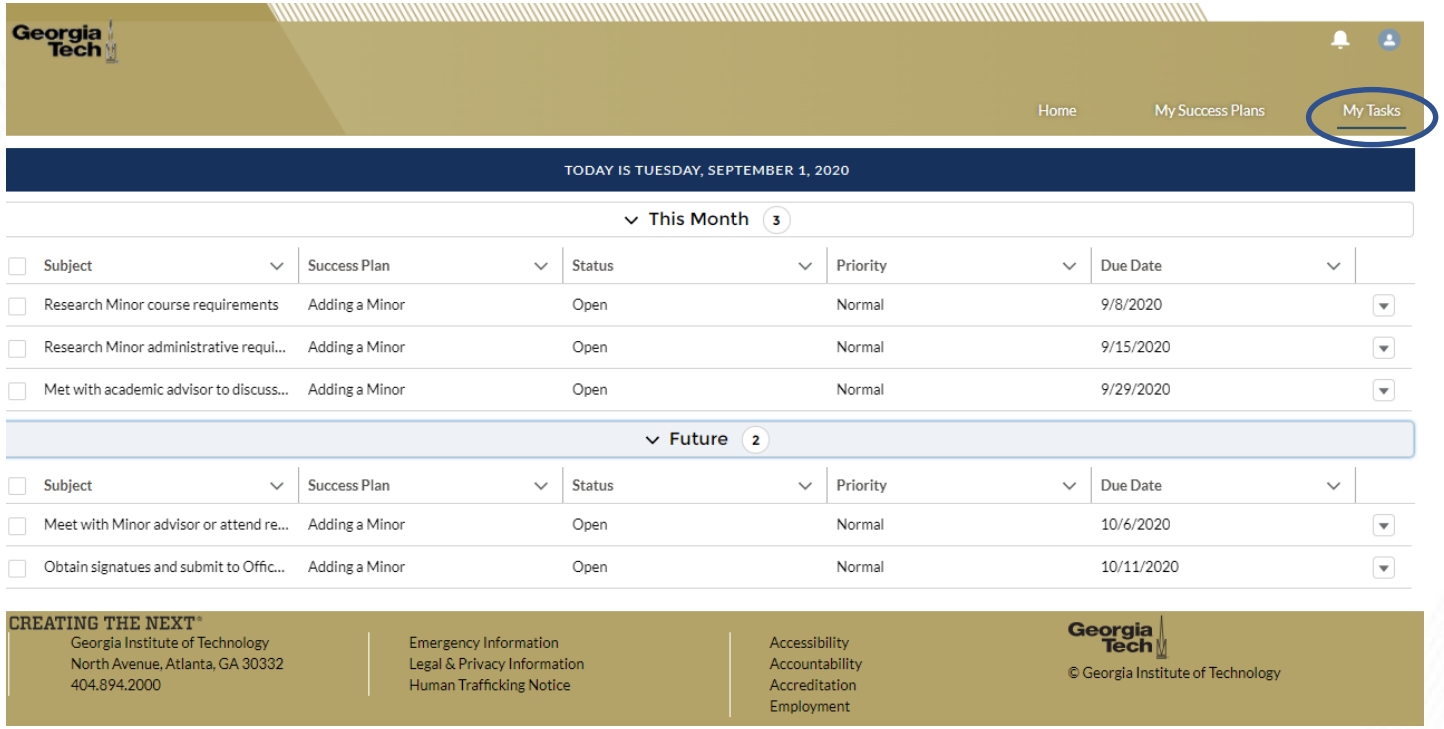
Student Community: View Your Assigned Tasks



- 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



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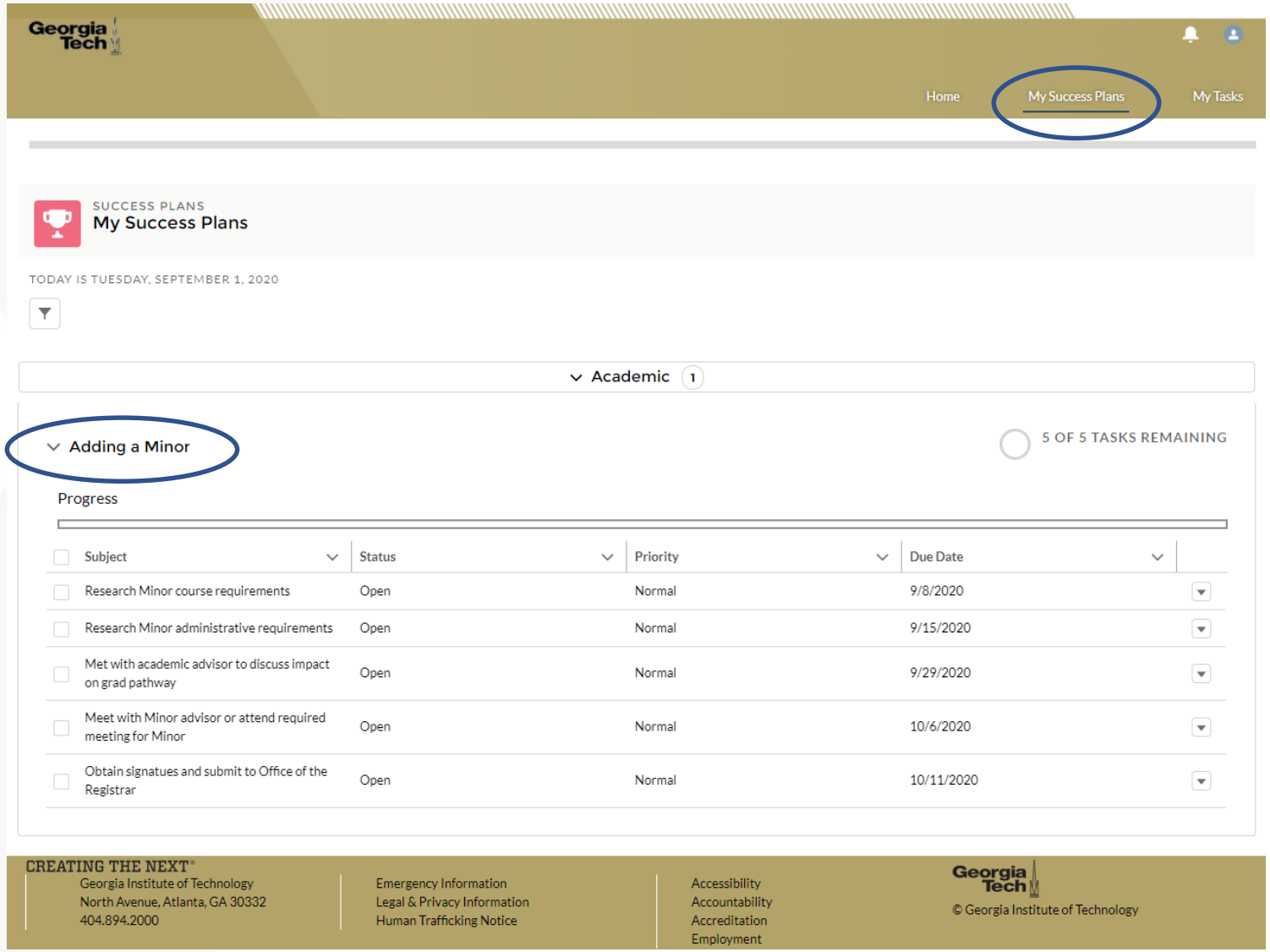
Student Community: View Your Success Plans



- 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.

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Support Resources

Get Help After Go-Live: September 14

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.

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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.

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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

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Thank You!