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Last Edited December 14, 2018

Academic Advising Technology
Accessing the Panther Success Network

To access the *Panther Success Network*, log into myFIU or *Campus Solutions* using your FIU username or Panther ID and password.

Following successful log-in, confirm that what is being shown is the Advisor page.

To change to the Advisor page, you will find the Role Menu at the top of the page. Select the *Advisor* role.

You will be redirected to the Advisor homepage.

Select the Success Network tile.
You will now be redirected to the Advisor Dashboard.

On this page, there are two ways to access the Panther Success Network:

1) Select the Panther Success Network button on the left-hand side of your screen

OR

2) Click on the Panther Success Network link at the top of the Advisor Dashboard.

You will be redirected to the Panther Success Network log-in page.

Proceed to log-in using your FIU Panther ID # or username and password.
Login to GradesFirst SP

FIU Username (e.g.: jdoe001)

Forgot your username?
Forgot your password?

Password

Need Help?

Login
Viewing Your Caseload

The students in your caseload can be viewed on the home page. To navigate your caseload, select between “My Assigned Students for [Current Term]” or “My Assigned Students All Terms,” found in the dropdown menu.

Active students are placed in either of these populations depending on whether they are currently enrolled in courses.

In the caseload table, you will see the total number of students in your caseload. This information is located at the bottom right hand corner.

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16 total results
From your *Advisor Home Page*, you can see basic information related to your active students, such as Panther ID, student name, watch list and cumulative GPA.

In addition, you can sort your caseload in ascending and descending orders by Student Name/ID, Watch List and Cumulative GPA.
Viewing a Student Profile

To view the student's profile within, click on the student's name in your caseload.

You will be redirected to the student's profile page.

On the student's profile page, you will see a series of tabs: Overview, Success Progress, History, Class Info and More.

The Overview tab provides a breakdown of the following information:

- Course Grade D/F
- Repeated Courses
- Withdrawn Courses
- Cumulative GPA
- Total Credits Earned (hover mouse over icon)
• Credit Completion % at this institution (hover mouse over icon)

You can also view the following information on the student's home page:
• Current declared major or minor
• Any previously declared major or minor
• Panther ID
• Classification
• Most Recent Enrollment Term
• Advisor Name
• Categories
• Tags
The Success Progress tab shows you a breakdown of:

- Success Markers (to be added at a later date)

- GPA Trends by Term

- Credit Trends by Term

- Chronological list of GPA, Credits Attempted, and Credits Completed
The History tab allows you to view Reminders, Notes, Cases, Alerts, Progress Reports, Advising Reports, Tutor Reports, and Visits to Support Centers.

The Class Info tab will show you the student's courses they are currently enrolled in as well as future courses they are enrolled in.

The term details include a semester-by-semester breakdown of their courses as well as grades received, GPA, and Academic Standing.

Within the More tab, you will find Calendar, Study Hall, Appointments and Conversations.
### December 2018

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*12:00 PM - 1:00 PM: General psychology*  
*10:00 AM - 11:00 AM: Memory/Mood*  
*12:00 PM - 1:00 PM: Psychotherapy*  
*9:00 AM - 10:00 AM: Hypnosis*  
*10:00 AM - 11:00 AM: Memo*  
*9:00 AM - 10:00 AM: Memo*  
*12:00 PM - 1:00 PM: Memo*  
*10:00 AM - 11:00 AM: Memo*  
*9:00 AM - 10:00 AM: Memo*  
*12:00 PM - 1:00 PM: Memo*
Viewing Your Conversations

You can access your Conversations by clicking on the Envelope icon located on the left-hand toolbar.

You will be redirected to the My Conversations page.

Here you will see all Messages sent and received.

You can filter your messages by:

- clicking on the View Personal Messages Only box
- clicking on the View Unread Only box
- Search by Users
Reading Your Messages

When you receive a message in your My Conversations inbox, click on the message Topic to open.

You will be redirected to the message where you are able to read it.

If you wish to return back to the My Conversations page to see the list of messages in your inbox, click on Back to My Conversations. This will redirect you back.
Responding to Your Messages

When you receive a message in your My Conversations inbox, click on the message Topic to open.

You will be redirected to the message where you are able to read it.

Fill in all applicable information in your return message.

Attach any relevant documentation if necessary.

Click on Send Message.
Creating Your Appointment Availability

On the Advisor home page, you will find the My Availability tab. The Times Available table lists all of your appointment availabilities. Each availability can be set up for different appointment types, locations, date periods, days of the week and times.

To create a new time availability, select Add Time found in the Actions menu on the top left-hand corner of the Available Times table.

The Add Availability pop-up window will open.

Select details that are applicable to this availability:

- Days of the week
- Time Frame
- Duration of Availability
- Availability Type (Drop-in, Appointments or Campaigns)
- Care Unit
- Location (Appointment Center location)
- Service
Note: Specify Office Location inside of Special Instructions for Student box. This location or information will be reflected in the appointment confirmation when appointments are made.

Designate the maximum number of students per appointment you will be seeing during this availability. If you wish to create Group Advising availability, specify for multiple students.

Click Save.

Note: An availability must be made for each Time Frame, Availability Reason, Location, and Student Service provided.
Copying an Appointment Availability

To copy Appointment Availabilities, select the Availability you wish to copy from the Available Times table.

Click on Copy Time from the Actions drop down menu.

The Copy and Add Availability window will open. This will reflect the original time frame and Student Service designated from the previous Availability made.

Make all the applicable changes to the Availability.
Note: Remember to Specify Office Location for this Availability as well. It will also be specified in the appointment confirmation.

Click Save.
Deleting an Appointment Availability

To delete Appointment Availability, select the Availability you wish to delete from the Available Times table.

Click on Delete Time from the Actions drop down menu.

A yellow banner will appear at the top of your screen confirming this action.
Viewing Your Calendar

On the left-hand toolbar, you will be able to access your Calendar by clicking on the Calendar icon. You will be redirected to the My Calendar page.

The Calendar assigns a color to each type of event, e.g. Advising Appointments, General, Free Busy, Cancelled, etc.

At the top of the Calendar, you will find boxes for the different categories of events. Checking off these boxes allows you to filter the events by category.

Additionally, you are able to navigate your Calendar by utilizing the Today, Day, Week, Month buttons at the top right-hand corner of the Calendar.
Viewing Your Calendar (List View)

There is a list view of your Calendar that can be accessed by clicking on the List of Calendar Items tab.

This view organizes the events in your schedule by separating them within Today, This Week and Next Week.
Syncing your Outlook Calendar

One the left-hand toolbar, you will find the Calendar icon. Click to open the My Calendar.

To begin process of syncing your Outlook Calendar with the Panther Success Network, click on the Setup Exchange Calendar Integration button.

You will be redirected to the Exchange Integration page. Click on the Connect with Exchange button.

Your two calendars will automatically be synced and beginning communicating.
Adding Events to Your Calendar

At the top right-hand corner of Calendar View you will see the Add Calendar Events button.

To initiate this process, press the Add Calendar Events button. You will be redirected to the Schedule Appointment page.

You will be redirected to the Schedule Appointment page.

Specify the following:
• Care Unit
• Location
• Service
• Date of Appointment

Add the name of the student that you will be meeting with on the date that you selected. You will
add the student by typing in his/her name to the Add an Attendee box.

If you wish to add any other persons to the appointment, continue to add these persons by typing their names into the Add an Attendee box.

Confirm that your name is selected in the Select an Organizer table.

Specify the length of the advising appointment to view the schedule of appointment times.

Select the desired appointment time.

Select if the appointment should repeat and its frequency.

Click on Save Appointment.
Printing Your Calendar

At the top right-hand corner of both views (Calendar and List Views) you will see the *Print Calendar* buttons.

Click on the *Print Calendar* button.

A new window will open with a pdf image of your schedule.
Creating an Advising Appointment on Behalf of the Student

Option 1
To create an Advising Appointment, first, select student name from your caseload.

Click on the Actions dropdown menu and select Schedule Appointment. You will be redirected to the Schedule Appointment page.

Select the following:
- Care Unit
- Location
- Service
- Course (if applicable)
- Comments (if applicable)
- Date of Appointment
You will now see to the right, a list of the people attending this appointment. You may add additional attendees if you would like by typing the person’s name in the Add an Attendee box on the right.

If you do not wish to add attendees, click on your name (as Advisor) in the Select an Organizer table below this list.

Specify the length of the advising appointment.

Select the desired appointment time.

Select if you wish this appointment to repeat. If so, please select from the Repeat dropdown menu.
Click on Save Appointment.

Option 2
To make an appointment on behalf of the student click on the student’s name in your caseload. You will be redirected to the Student Profile Page.

On the student’s profile page, you will see the I want to… menu on the right-hand side of your browser’s window. To begin scheduling an appointment, click on the Schedule an Appointment link.

Select the following:
- Care Unit
- Location
- Service
- Course (if applicable)
- Comments (if applicable)
- Date of Appointment
You will now see to the right, a list of the people attending this appointment. You may add additional attendees if you would like by typing the person’s name in the Add an Attendee box on the right.

If you do not wish to add attendees, click on your name (as Advisor) in the Select an Organizer table below this list.

Specify the length of the advising appointment.

Select the desired appointment time.

Select if you wish this appointment to repeat. If so, please select from the Repeat dropdown menu.
Click on Save Appointment.
Creating an Advising Appointment Summary

Option 1
To create an Advising Appointment Summary, first, select student name from your caseload.

Click on the Actions dropdown menu and select Advising Appointment Summary.

A pop-up window with the advisor report form will open.
Fill in or Select applicable information:
- Care Unit
- Location
- Service
- Date of Visit
- Meeting Times (Begin and End)
- Student Check-In and Check-Out times
- Accept Terms & Conditions

Pay close attention in filling out the Summary Details and Advisor Comments.

You will now be able to personalize the Advisor Comments using the formatting menu at the top of the comments box.

Click on Save this Report to submit.

Option 2
Click on the student's name in your caseload. You will be redirected to the Student Profile Page.

To create an Advising Appointment Report, click on the Report On Advising Appointment link to the right of the Overview page.
A pop-up window with the advisor report form will open.

Fill in or Select applicable information:

- Care Unit
- Location
- Service
- Date of Visit
- Meeting Times (Begin and End)
- Student Check-In and Check-Out times
- Accept Terms & Conditions

Pay close attention in filling out the Summary.
**Details and Advisor Comments.**

You will now be able to personalize the Advisor Comments using the formatting menu at the top of the comments box.

Click on *Save this Report* to submit.
Creating an Advising Note

Option 1
To create an Advising Note first, select student name from your caseload.

Click on the Actions dropdown menu and select Note. A pop-up window with the Note formulary will open.

Fill in applicable information:
- Comments (required)
- Note Reason

If, applicable, attach any relevant documentation.

Note: Pay close attention to the Visibility options:
- [Advisor’s Name] Only - Allows the author (you) of the Note to be the only one to view. (Not Recommended).
- Student – Allows the student to view Note.
- Printed Student Report (Currently Not Functioning)

Click on Save Note to submit.

Option 2
To enter a Note for a student, click on the student’s name in your caseload. You will be
redirected to the Student Profile Page.

From the Student Profile Page, click on the Add a Note on this Student link to the right of the Overview page. A pop-up window with the Note formulary will open.

Fill in applicable information:

- Note (required)
- Note Reason from dropdown menu

If applicable, attach any relevant documentation.

Note: Pay close attention to the Visibility options:

- [Advisor's Name] Only - Allows the author (you) of the Note to be the only one to view. (Not Recommended).
- Student – Allows the student to view Note.
- Printed Student Report (Currently Not Functioning)

Click on Save Note to submit.
Creating a Watch List

To create a new Watch List, click on the Post-It icon found on the left-hand toolbar.

You will be redirected to the Watch List and Saved Searches page.

Click on New Watch List button on the top right-hand corner of the Watch List table.

You will be redirected to the Adding New Watch List page.

Type in Name of Watch List.

Click on Save Watch List.
Adding a Student to a Watch List

Option 1
To add a student to a Watch List, first, select student name from your caseload.

Click on the Actions dropdown menu and select Add to Watch List. A pop-up window will open listing your Watch Lists.

Click on the Watch List you wish to add the student to.

Option 2
To add a student to a Watch List, click on the student’s name in your caseload. You will be redirected to the Student Profile Page.

From the Student Profile Page, click on the Add to Watch List link to the right of the Overview page.

A pop-up window with the Add to Watch List formulary will open.
Select which *Watch List* you wish to add the student to. 

Click Save.
Removing a Student from a Watch List

To remove a student from a Watch List, first, select student name from your caseload.

Click on the Actions dropdown menu and select Remove from Watch List.

Confirm that you want to remove the student.

Progress Reports, Early Alerts and Cases

Throughout the semester, faculty will be issuing Progress Reports for students enrolled in their courses. If a Progress Report is issued where a student is marked “At-Risk” [of failing] an Alert is issued, and a Case is opened.
Viewing Current Alerts

When an Alert is issued, the Alert is placed on the student’s profile page. It will be noted above the I want to... menu.

To access details of the Alert, click on the arrow to the right of Current Alerts title. A dropdown menu will appear with a link to the Alert.

Click on this Alert to access.

You will be redirected to the History tab on the student’s profile page where you will see the details of the Alert.
Managing a Current Case

To *Manage a Case*, you will document any sort of interaction, intervention or communication you have with a student or the faculty member following the *Alert* being issued.

From your *Advisor* homepage, there is a central hub for all of your Cases. To access this page, click on the icon in the blue menu bar on the left-hand side of your homepage.

You will be redirected to the *Cases Page* where you will see by default all the current *Cases*.

Click on the *Manage Case* button.
A pop-up window will open.

Once an updated is needed, e.g. student has been contacted, advising appointment has taken place, advisor has contacted faculty, etc. comments can be saved.

A text box will open up.

To save comments, click on the Add Comment button and type in any relevant information needed to be documented.
The comments will be automatically be visible.

Faculty will be able to view comments and add comments to update the student’s progress throughout the semester.

At the end of the semester or after the Case has been resolved, you may close the Case by clicking on the Close Case button.
Another pop-up window will open.

Select the *Outcome* from the dropdown menu and enter any relevant comments.

Click *Submit*.

Once submitted, a final summary of the *Case* will appear.
Viewing Alerts and Cases from the Student Profile

Historical Alerts and Cases, e.g. those that have already resolved or were can be seen from within a student’s profile page.

To view these items, click on the History tab at the top of the student’s profile page.

Towards the bottom half of this page, you will find all historical documentation for the student, e.g. Alerts, Cases, Appointment Summaries, Notes, etc.

These items will appear listed in chronological order, from newest to oldest.
To filter for Alerts and Cases, click on the dropdown menu and select the documentation you wish to isolate.

The Alerts or Cases that you wish to view will appear in list form.

From this list, you may Manage an Alert or Case.
Creating an Advising Appointment Campaign

Note: Prior to creating an Advising Appointment Campaign, you must first save an Appointment Availability specifically for Campaigns.

To access the Campaign function, click on the Mountain Logo on the left-hand toolbar. Remember that this toolbar is accessible from any page on the Panther Success Network.

You will be redirected to the Appointment Campaign page for the current term, e.g. Spring Term 2019 Campaigns.

To begin your Campaign, click on the Appointment Campaign link on the right-hand side of the page in the Actions menu.
Customizing Your Campaign

You will be redirected to Define your Campaign. By defining your Campaign, you can customize your Campaign.

You can customize your Campaign by doing the following:

- Type in the Campaign Name.
- Select the type of Care Unit
- Select Location for appointments.
- Select a Service for the Campaign, e.g. General Advising.
- Select a Begin Date and End Date.
- Select Appointment Limit. This will dictate how many appointments a student may make with you during the Campaign.
- Select Appointment Length.
- Select Slots per Time. This will dictate how many students will be able to meet with you at a time.

Click on the Continue button.
Selecting Your Student Population

If you wish to include all students in your Campaign, select *Invite All My Assigned Students*.

If you wish to include only a specific student population, select *Advanced Search*. Here you select criteria to isolate students that you wish to meet with.

A) If you select *Invite All My Assigned Students*: You will be asked to confirm your selection.

After confirmation, you will be given the opportunity to *Review* the list of students included in the Campaign. To edit, you can either remove or add students.

To remove students from the list, select the name(s) of the student(s) that you wish to remove.

Click on the *Remove Selected Users* button in the Action Menu found on the top left corner of the table.

The list of students’ names will automatically be updated.
To add students to the list, click on the **Add More Students** link at the bottom of the table. You will be redirected to the **Add Students to Campaign** page.

**B) If you select the Advanced Search:**
You will be redirected to the **Add Students to Campaign** page.

Begin by selecting whether you wish to limit the student population to your assigned caseload. Select the **My Students Only** option at the bottom of the page by the **Search** button.

Select the criteria you wish to apply to the **Campaign**.

Click on the **Search** button.
You will now receive a list of students that will be included in the Campaign.

Select the students that you wish to include. If you wish to include all students, select the All option at the top of the list.

You will also have the opportunity to remove students from this list as well. Select the student(s) name(s) and click on Remove Selected Users in the Actions Menu.

Click on the Continue button to move forward.

You will now be redirected to the Add Advisors to
Campaign page.

Select your name from the list.

Click on Continue button.

Composing Your Campaign’s Message

By default, you will see that there is a message provided for you that can be used as part of your Campaign. You can, however, customize the message to suit your needs.

To customize the message, you can make changes to the overall text and attach files to the email that your students will receive.

You will see below this text box what your message will look like in the preview.

Press Continue once you have finalized your message.
Confirming Your Campaign

Once you have composed your Campaign’s message, you will receive a Summary of your Campaign. Review the information and press Send to complete your Campaign.

Note:
What Your Student Sees

Your students will receive both an email and a yellow banner will be placed on their homepage. This will be visible when the student logs onto the Panther Success Network.

To schedule an appointment, the student will click on the Schedule This Appointment button on the yellow banner and follow the instructions.
Creating a Reminder for a Student

To create a Reminder for a student, click on the student’s name in your caseload. You will be redirected to the Student Profile Page.

From the Student Profile Page, click on the Add a Reminder to this Student link to the right of the Overview page.

A pop-up window with the Add to Watch List formulary will open.

Type in the Reminder topic and Due Date.

Click on Save Reminder button.
Editing a Reminder for a Student

To edit a Reminder, pushpin icon on left-hand toolbar.

You will be redirected to the My Reminders Page.

Click on the Edit link to the right of the Reminder you wish to edit.

The Edit Reminder pop-up will open.

Make all necessary changes to the Reminder and click on Save Reminder.
Deleting a Reminder for a Student

If create a Reminder by mistake, you may delete it from your Upcoming and Overdue Reminders table.

Click on the right pushpin icon on the left-hand toolbar.

You will be redirected to the My Reminders page.

Select the Reminder that is to be deleted.

Click on Deleted Selected Reminders found in the Actions dropdown menu.
Performing Advanced Searches

To perform a Search, select the magnifying glass on the left-hand tool bar. You will be redirected to the Search page.

The Search engine allows you to search for select populations using the different filters available. Click on “Show Advanced Filters”, located on the top right-hand corner of the New Search table.

From here, you can add or remove filters to personalize the search you are conducting. Each individual category can be expanded to input more search criteria.

Click on the My Students Only box to narrow the student population to only your assigned caseload. Otherwise, you will be receiving search results from all active students in the university.

Click on Search.
Saving Advanced Searches

To save a Search that you have conducted, click on the Save button located at the top of your Unsaved Student Search.

The Save Search pop-up will open.

Name the Search and Click on Save Search.

Accessing your Saved Searches

To access your Saved Searches, click on theSaved Searches dropdown menu located in the Search page.

Your search will automatically rerun and open reflecting the latest search results.

The search will reflect that it has been Modified at the top of the search table.
Advising Students using the Appointment Queue System

The Appointment Queue system alerts you when there is a student waiting to be seen.

When students are checked-in by the Front Desk Staff, you will receive a notification at the top of your screen. Clicking on this icon will allow you to see all students that waiting to be seen.

To begin an appointment, select Start Appt.

The Advisor Summary for this student will open. In the Advisor Report, you can fill out all the information necessary for the appointment such as:

- Care Unit
- Reason
- Any courses that were discussed
- Date of the visit
- Location
- Advisor and student attendees
- Report details
- Advisor notes
Note: The Advisor Report Appointment Details will specify if the student had a scheduled appointment or is a drop-in.

Once all information has been entered into the Advisor Report, click on Save This Report.

Note: During the appointment, if you need to view the student’s profile, you can minimize the report.

You will see a notification reminding you of the Advisor Report at the top of your page over the Window icon.

Select the icon and click on the Advisor Report link for the student to re-open it.

Once an Advisor Report has been saved, the student will be checked out of the appointment queue.
If you have questions after reviewing this tutorial, please contact Advising Technology at advtech@fiu.edu.