FACT Advisor Guide
Faculty/Advisor Communication Tool
(former Early Warning application)

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Introduction

> Implementation Goals

- Provide a single, user-friendly, web-based application that meets the needs of all academic units
- Improve the existing faculty user interface and management of student cases
- Improve operating efficiency for advising staff – provide an easy, searchable, sortable application
- Improve the ability to manage the student; increase visibility into student data including historical information
- Improve communication between faculty and advisors
- Improve activity management and tracking of student interactions
- Improve the communication process, automating where possible; allow for electronic communication to students, faculty, and advisors
- Seamless integration with SIS for near real-time changes to data
- Provide easy-to-use and real-time reporting; allow for the ability to prove the impact of the application and show trends
What is FACT?

- Faculty/Advisor Communication Tool
  - Replaces the former Early Warning systems
  - Expanded functionality to allow for more than just warnings
    - Cases are submitted by course instructors for:
      - Warnings
      - Attendance reports
      - Progress reports
  - Consists of two applications:
    - Faculty web application
    - SFDC (salesforce.com) for advisors
What data can I access?
> Advisor users

- What can I see?
  - Accounts
    - All students
    - All faculty
  - Courses
    - All courses
    - All enrollments
  - Cases

- What can I edit?
  - Cases that I own
  - Activities
  - Case Comments
How do I log in?

- Navigate to [www.salesforce.com](http://www.salesforce.com)
- Click the Customer Login tab
- Enter your MyNEU username appended with “@neu.edu”
  - Example: v.ritz@neu.edu
- Enter your MyNEU password
  - Same password used for checking payroll

- **Optional:** Create a bookmark or a shortcut on the login page for future use!
General Navigation
Home Page
> Search, Create New, Recent Items, Tabs

To Search for:

- **Students and Faculty**… Use a whole or partial name. For a complete name search, use the format “Last Name, First Name” (e.g. Smith, John). You can also search using NU Id, email address, or phone number.

- **Advisors**… Primary, secondary, and other advisors are User records in salesforce.com. Search for users by whole or partial name, NU Id, email address, or phone number. For complete name, use the format “First Name Last Name” (e.g. John Smith).

- **Courses**… Search for courses using key number, course number, course title, or department code.

- **Cases**… Search for cases using the assigned case number.

Click the **Record Tabs** located at the top of the page to display the home page for the listed object. For example, to view student or faculty account information, click the **Accounts** tab.

The **Create New** drop-down list provides options to create new records. Select the type of record you wish to create from the available options. The new record page immediately displays in the appropriate tab.

**Recent Items** displays the last ten records you have viewed in the application. Each picture icon represents the type of record represented. For example, a file folder represents an **Account** and a briefcase represents a **Case** record.
Use activities to help manage appointments, meetings, and reminders. Optionally, choose to use pop-up reminders and synchronize activities with Lotus Notes. Check other advisors schedules and send invitations to students.

**Tasks** are activities that are due on a specific day, but are not bounded by time. Today, I need to email my advisee and call my boss, etc.

**Events** are activities that are scheduled for a particular day and time, and have a duration. Today I have a 2-hour meeting at 11am. Tomorrow I have a conference call at 9am for 30 minutes.

Click on a particular day to view your scheduled events.

Use the calendar buttons to see a day, week, or month view of your calendar and schedule new events.

Change the default task view based on your preferences.
Tab Home Pages

Each Tab has a home page that allows you to use and create views.

Click Create New View to create and save a new custom view

View a list of available view from the View drop-down list.

To create a custom view:

- **Name**… Give your view a name that will be recognizable to you such as “My Biology Majors” or “My Athletes”

- **What to Search in**… Choose whether to look through all accounts, or just the ones you own (primary advisors only)

- **Search Criteria**… Using the available fields, create field filters such as “Major equals Biology” or “Student Athlete? Equals True”

- **Select Columns**… Decide which columns to display

Views will be saved for future use
Working with Records

> Detail Mode

The Detail View of a record displays the field information of the record you are currently viewing. Clicking on the appropriate hyperlink will navigate you to the corresponding record:

- Clicking on an account name will navigate you to a student or faculty account record
- Clicking on a course name will navigate you to a course record
- Clicking on a case number will access a case

**Student and Faculty** account records are not editable by users. They are updated on a daily basis from the data in the Registrar's database. Student pictures will display if the student opted in during the I Am Here process.

The Account Owner for a student account is the primary advisor.

The **Account Owner** for the account is Vanessa Ritz.
Case records are the warnings, attendance reports, and progress reports submitted by course instructors. The fields submitted by the instructor are not editable by SFDC users, but there are additional advisor-only fields that are editable. Most of these are made visible back to the faculty who logged the case.

Clicking the **Edit** button on a record will navigate you to the edit mode and enable you to edit specific fields.

You must click **Save** in order for your edits to be captured on the record.
Working with Records

> Related Lists

The Related Lists area, located directly below the record detail area and accessible via links at the top of the record, displays information related to the record you are viewing.

For example, Case records have related lists that represent open and closed activities, case comments, attachments, and history.

From the related lists you can view related record details and take various actions represented by the buttons on the lists.

For example, choose to create a new case comment, task, or event.

You can also choose to edit appropriate related records.

The Related Lists area is accessible via links at the top of the record.
FACT Case Process
New Case

> Email Notification

- Course instructors log cases for the students enrolled in their courses.
- New cases will be automatically assigned to the student’s primary advisor.
- The advisor will receive an email notification of the new case assignment.
- Click on the hyperlink in the email to log into SFDC and access the new case record.
- Optionally, search for the case using the case number provided in the email.

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From: FACT Administrator  
Sent: Wednesday, September 19, 2007 8:07 AM  
To: Your name here [the primary advisor of the student]  
Subject: Case #00001074 for Fred Blintstone has been assigned to you.

*** NEW CASE ASSIGNMENT NOTIFICATION ***

The following case has been assigned to you.  
Student:  Fred Blintstone  
Instructor:  BRANDOLINI, JOHN  
Type:  Warning  
Grade to Date:  C-  
Faculty Comments:  Fred doesn’t seem interested in the course subject.

Click on the link to access the case:  https://tapp0.salesforce.com/500T000000pqcK  

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**New Case**

> Review the Case Details

- Review the details of the case logged by the course instructor
- Note the type of case (details on the next slide)
- Note whether an email was sent to the student regarding the case
- Click on the various links to view details of the related records
  - Click on the account name to view the student record and other courses and cases for the student
  - Click on the course name to view other cases logged for the course

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<table>
<thead>
<tr>
<th>Case Detail</th>
<th>Edit</th>
<th>Close Case</th>
<th>Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Owner</td>
<td>Susan Kells [Change]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case Number</td>
<td>00001532</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account Name</td>
<td>Flinstone, Fred</td>
<td></td>
<td></td>
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<tr>
<td>Instructor</td>
<td>FRANCO, LYN JOH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date/Time Opened</td>
<td>10/4/2007 10:36 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date/Time Closed</td>
<td>10/1/2007</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Warning Information**

- Type: Warning
- Faculty Email to Student?: Yes

**Areas of Concern**

- Not Prepared for Class?: Yes
- Difficulty with Assignments?: No
- Difficulty with Exam/Test/Quiz?: Yes
- Difficulty with Papers/Projects?: No
- Faculty Comments: Fred doesn't seem interested in this class, he failed his last exam and is struggling.

**Faculty Suggestions**

- See Instructor?: Yes
- Seek Tutoring?: Yes
- Faculty Suggestions: Fred should see me for office hours or consider dropping the class...
New Case

Case types as described to course instructors

**RED**
- Poor/declining performance
- Difficulty with course work or exams
- Difficulties with tardiness, class preparation, attendance, etc.

**YELLOW**
- Academic assistance could be helpful
- Tutoring may be beneficial
- An advisor’s guidance may be helpful

**GREEN**
- Time sensitive reports: Performing at or above satisfactory level
- Identifies improvement for students previously yellow/red

**MISSING from Class**
- Never attended class
- Stopped attending without explanation, but continues to be registered

Cases can include specific areas of concern in the case details.

- **Concerned with Grade (or with Failing):**
- **Grade to Date**
- **Participation**
- **Inappropriate behavior**
- **Suggestions section:** An opportunity for faculty to expand on these selection and any other suggestions you may have in the Suggestions field

- **Attendance**
  - **Stopped Attending On:** If the student has stopped attending, fill in the date of the first missed course. If the exact date is not known, approximate

- **Other:** Complete any other fields described under the Warning section as appropriate. This information will be used by the advisor to counsel the student

- **Grade to Date:** Progress reports are used periodically for updates on certain students. Select a value to alert the advisor of the current grade
- **Comments:** If there is additional data to report, use the comments field for free text entry
- **Other:** Complete any other fields described under the Warning section as appropriate. This information will be used by the advisor to counsel the student
New Case

> Reassign the Case if needed

- Cases are originally assigned to the primary advisor associated to the student
- You can reassign your cases to another advisor such as a secondary or athletic advisor

**Make sure to check the *Send Notification Email* checkbox to alert the new owner of the assignment. They will receive the notification email immediately.**

**Search for the advisor using the magnifying glass icon or enter the whole or partial advisor name.**

**Click Save to save the assignment.**
New Case

> Review the Student Account details (if needed)

The Student Account record contains information such as name, gender, and FERPA parental disclosure.

- **Account Owner**… the primary advisor associated with the student
- **Secondary Advisor**… used to indicate the faculty advisor for certain colleges
- **College info**… details about the student’s college, major, and class year
- **Athletic info**… indicates whether a student is an athlete and the team(s) they are on

View contact details for the student including email and important phone numbers

Student pictures display for students who have not opted out during the I Am Here process. The picture displayed is the NU Id photograph.

View whether the student is on academic probation, whether they are an active student or withdrawn, any blocks, their division, and whether they are an honors student.

Use this link to send an email to the student. The email will display in Activity History related list for the account. You can also choose to BCC yourself to have the history in Lotus Notes.
The student account related lists include the following:

- **Enrollments**… displays a list of courses the student has enrolled in. Fields display whether a case has been logged for the course, as well as how many cases were submitted. The enrollment status displays whether the student is actively enrolled or whether they have dropped the course.

- **Cases**… a listing of all cases for the student. Listed are high-level details such as the course name, instructor, case type, and grade to date.

- **Open Activities**… lists the tasks that have not yet been completed and the events that are scheduled in the future.

- **Activity History**… lists completed tasks and events that have passed.

- **Notes & Attachments**… log notes and attach documents if needed.
New Case

> Review the Course details (if needed)

- Review the course details
  - Review information such as the title, class key, section, department, and course number
  - Use the course description hyperlink to view more details about the course
  - View the number of students actively enrolled, as well as the number of enrolled athletes

- Review the case details
  - Note whether the faculty has taken an action on the course and the date of the last action
  - Review the number of students with cases, as well as the number of athletes with cases
New Case

> Review the Instructor details (if needed)

- Clicking on an instructor name will navigate you to the faculty detail view
- Review the instructor name and contact information
- Schedule activities associated with the course instructor if needed
Work the Case

Create new EVENT activities

Create a New Event for scheduled meetings and calls with the student to discuss the case. Events have a start time and a duration. To create a reminder for a specific date that is not bounded by time, choose New Task instead.

- **Subject**... use this field like the subject in an email to briefly describe the event
- **Date, Time, Duration**... enter when the event is for it to appear on your calendar
- **Description, Private Description**... enter information about the event. Information entered in the Description field are sent in email invitations. Use the Private Description field to enter notes you don’t wish to share with the student or other attendees
- **Reminder**... determine whether you wish to have a pop-up reminder of the event

Use the **Add Invitees** button to send an email notification to the student or other invitees.
Create a **New Task** for reminders and to do items. Tasks have a due date but are not bounded by time. You can modify the due date if you aren’t able to complete a task on the originally scheduled date but wish to remind yourself to do it on a future date. If you want to block off time in your calendar for the activity, choose New Event instead.

- **Assigned To**… your name will default, but you can assign tasks to other people if needed
- **Subject**… use this field like the subject in an email to briefly describe the task
- **Due Date**… pick a target due date you wish to complete the task
- **Comments**… enter information about the task
- **Reminder**… determine whether you wish to have a pop-up reminder of the task
Work the Case

> Edit the Case record

- Edit the Case record to include outcomes, findings, and resolutions based on your activities that you wish to communicate to the course instructor
  - This information is visible to the instructor associated with the course

Click the edit button on your case and scroll down to the Advisor Feedback section

All of the advisor-entered fields on the Case record are visible to the course instructor EXCEPT the Referred to Counseling Center checkbox
Create Case Comments to capture private notes about the case or other information you do not want to communicate back to the course instructor.

- Information captured in the Case Comments related list is **NOT** visible to faculty.

When creating a new comment, the Faculty Suggestions and Comments are visible, as well as any past comments.

Type in your comment, optionally click the **Check Spelling** button, and click **Save**.

Comments are not editable and cannot be deleted.

A running reverse chronological list of Comments will display in the related list associated with the Case.
Work the Case
> Create Case Comments, cont’d.

- You can leave comments on cases you do not own
  - This is a great way to work together on cases and leave feedback for other advisors
  - An email will be sent to the Case Owner when someone else creates a new Case Comment

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From: Person who commented on your case
Sent: Wednesday, September 19, 2007 12:49 PM
To: Your name here
Subject: New case comment notification. Case Number 00001126

[Person who commented on your case] has added a comment to case 00001126. Please read the comment below and then click on the link to respond appropriately.

Comment:
[Text of comment here]

https://tapp0.salesforce.com/500T000000pqfs
```
Close the Case

- Click the Close Case button when you have reached a final resolution on the case

  - Change the Status to Closed
  - Review the data you previously entered in the Advisor Feedback section and make any necessary edits
  - Optionally, enter a last private Case Comment
  - Click Save to update the Case as closed and set a date/time closed
Need Help? Have Questions?

- Email questions to fact@neu.edu
- Contact the Help Desk for connectivity and other issues