PANTHER SUCCESS NETWORK ADVISOR MANUAL
To access the Panther Success Network, log into Campus Solutions using your FIU user name and password.

Click on the My_eAdvisor Dashboard link.

When you access your Advisor Dashboard, click on the Panther Success Network link.

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.
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.
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- Withdrawn Courses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:

- 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.
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 *Times Available* table.

The *Add Availability* pop-up window will open.

Select details that are applicable to this availability:
- Days of the week
- Time frame
- Availability Reason (drop-in, appointments)
- Duration
- Location (appointment center location)
• Student Service

Note: Specify Office Location inside of Details box. This location will be reflected in the appointment confirmation when appointments are made.

Click Save.

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

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Copying Appointment Availabilities

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

Click Save.

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

Deleting Appointment Availabilities

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

Click on Delete Time from the Actions drop down menu.

A pop-up window will appear at the top of your screen asking to confirm this action.

Click on OK or Cancel.
Editing Appointment Constraints

In addition to setting appointment availabilities, you are able to place two restrictions on appointments. You can determine constraints on how far in advance an appointment must be made and how long an appointment will be scheduled for.

To edit your appointment constraints, click on the Edit Appointment Constraints link.

The Student Appointment Constraints section will open.

Type in the number of Hours in Advance you wish to restrict students from making appointments.

Select from the dropdown menu the Default Appointment Length.

Click on the Update Constraints button.
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.

Select the following:
- Type of appointment
- Reason for appointment
- Location
- Date of Appointment

Select the Advisor from the Advisor Availability table.
Specify the length of the advising appointment to view the schedule of appointment times.

Select the desired appointment time and 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 Advising Appointment. You will be redirected to the Schedule Appointment page.

Select the following:
- Type of appointment
- Reason for appointment
- Location
- Date of Appointment
Select the Advisor from the Advisor Availability table.

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

Select the desired appointment time and 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
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redirected to the Student Profile Page.

From the Student Profile Page, click on the Schedule an Appointment link to the right of the Overview page. You will be redirected to the Schedule Appointment page.

Select the following:
- Type of appointment
- Reason for appointment
- Location
- Date of Appointment

Select the Advisor from the Advisor Availability table.
Specify the length of the advising appointment to view the schedule of appointment times.

Select the desired appointment time and click on Save Appointment.

Creating an Advising Appointment Report

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

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

A pop-up window with the advisor report form will open.
Fill in applicable information.

Pay close attention in filling out the Appointment Details, Report Details and Attendees boxes.

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 applicable information.

Pay close attention in filling out the Appointment Details, Report Details and Attendees boxes.
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.**

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**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.
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.
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

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**.

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**Clearing a Reminder**

Once the task related to a **Reminder** has been completed, you may clear 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 cleared.

Click on **Clear Selected Reminders** found in the **Actions** dropdown menu.
Deleting a Reminder

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

- Reason
- Any courses that were discussed
- The 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.