

Best Practices for Academic Advising: Utilizing Technology to Increase Efficiency

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Poll

- How many use MyPLAN?
- How many use MyPLAN while working with the student?
- How many enter MyPLAN notes at a later time?
- How many use the additional functions within Microsoft Office 365 (such as: tasks, categories)?



Microsoft Office 365

- How to integrate:
 1. Calendar
 2. Tasks
 3. Categories
 4. Email



Email and Calendar

The screenshot displays the Outlook interface for an email titled "Feb 12 Brown Bag - Message (HTML)". The ribbon includes "File", "Message", and "Developer" tabs. The "Message" tab is active, showing actions like "Ignore", "Delete", "Reply", "Reply All", "Forward", and "More". The "Quick Steps" section includes "Office Business", "Team E-mail", "Reply & Delete", "To Manager", "Done", and "Create New".

The email header shows:
From: UNL Academic Advisers <UNLADVISERS@listserv.unl.edu> on behalf of Britta Osborne <britta.osborne@unl.edu>
To: UNLADVISERS@LISTSERV.UNL.EDU
Cc:
Subject: Feb 12 Brown Bag

The email body contains:
AAA Best Practices Brown-Bag
Topic: Probation Advising
When: Weds. Feb 12th 11:30-1:00
Where: Bailey Library
What/How: We will be circulating a research article covering probation advising to the AAA committee.

-AAA Best Practices Committee
(Chaired by Ben Heinisch)

The "Move" dropdown menu is open, showing the following options:
Inbox
Deleted Items
Office Business
Tasks
Inbox - psychadvising@unl.edu
Calendar (highlighted)
PSYC 100
Personal
EDAD
Junk E-Mail

 Other Folder...
 Copy to Folder...
 Always Move Messages in This Conversation...

Two green arrows are overlaid on the image: one points to the "Move" button in the ribbon, and the other points to the "Calendar" option in the dropdown menu.



How to Use “Tasks” Function

The screenshot displays the Microsoft Outlook interface for the 'To-Do List' of user CSPIER2@unl.edu. The ribbon includes options for 'New Task', 'Delete', 'Reply', 'Forward', 'Mark Complete', 'Remove from List', and 'Prioritized'. The task list is organized into categories: 'Categories: (none) (1 item)', 'Categories: a: Immediate Tasks (13 items)', 'Categories: b: PSYC 100 (7 items)', and 'Categories: c: Graduation Issue (5 items)'. A green arrow points to the 'Tasks' button in the bottom-left navigation pane.

Task Name	Due Date	Categories	In Folder
Categories: (none) (1 item)			
Mckenzie Colt (1/15/14)	None	Tasks	Tasks
Categories: a: Immediate Tasks (13 items)			
Wolfe Award	Fri 1/10/2014	a: Immediate Tasks	Tasks
Staff Evaluation	None	a: Immediate Tasks	Tasks
Brandon Bogus - Letter of Rec	Fri 1/17/2014	a: Immediate Tasks	Tasks
Post on Blackboard - CB3 Directions	Tue 1/21/2014	a: Immediate Tasks	Tasks
Line up LC Pictures	Fri 1/24/2014	a: Immediate Tasks	Tasks
PSYC 181 - Transfer Evaluation	Fri 1/24/2014	a: Immediate Tasks	Tasks
Yukina Chen - Letters of recommendation	Fri 1/24/2014	a: Immediate Tasks	Tasks
Create Sign-In Sheets	Fri 1/24/2014	a: Immediate Tasks	Tasks
Take Career Assessment	Fri 1/31/2014	a: Immediate Tasks	Tasks
AAA Presentation	Fri 2/14/2014	a: Immediate Tasks	Tasks
Contact Katherine Poage	Fri 2/21/2014	a: Immediate Tasks	Tasks
Nominate Rachelle for Ovation Award!	Fri 2/28/2014	a: Immediate Tasks	Tasks
Publish NACADA article	Sat 3/15/2014	a: Immediate Tasks	Tasks
Categories: b: PSYC 100 (7 items)			
Add pre-health course work to Degree Plan	None	b: PSYC 100	Tasks
Add disclaimer to Degree Plan	None	b: PSYC 100	Tasks
Add 1 credit of PSYC to Degree Plan	None	b: PSYC 100	Tasks
Send thank you cards	None	b: PSYC 100	Tasks
Include TA's names and pics	None	b: PSYC 100	Tasks
Create Sign-In Sheets	Fri 1/24/2014	b: PSYC 100	Tasks
Consider switching PSYC 100 to letter grade	None	b: PSYC 100	Tasks
Categories: c: Graduation Issue (5 items)			



Task Options

The screenshot displays the Microsoft Office Task Pane for a task. The ribbon at the top includes File, Task, Insert, Format Text, Review, and Developer. The Task ribbon is active, showing various options:

- Actions:** Save & Close, Delete, Forward, OneNote.
- Show:** Task, Details.
- Manage Task:** Mark Complete, Assign Task, Send Status Report.
- Recurrence:** Recurrence.
- Tags:** Categorize, Follow Up, Private, High Importance, Low Importance.
- Zoom:** Zoom.

Task details:

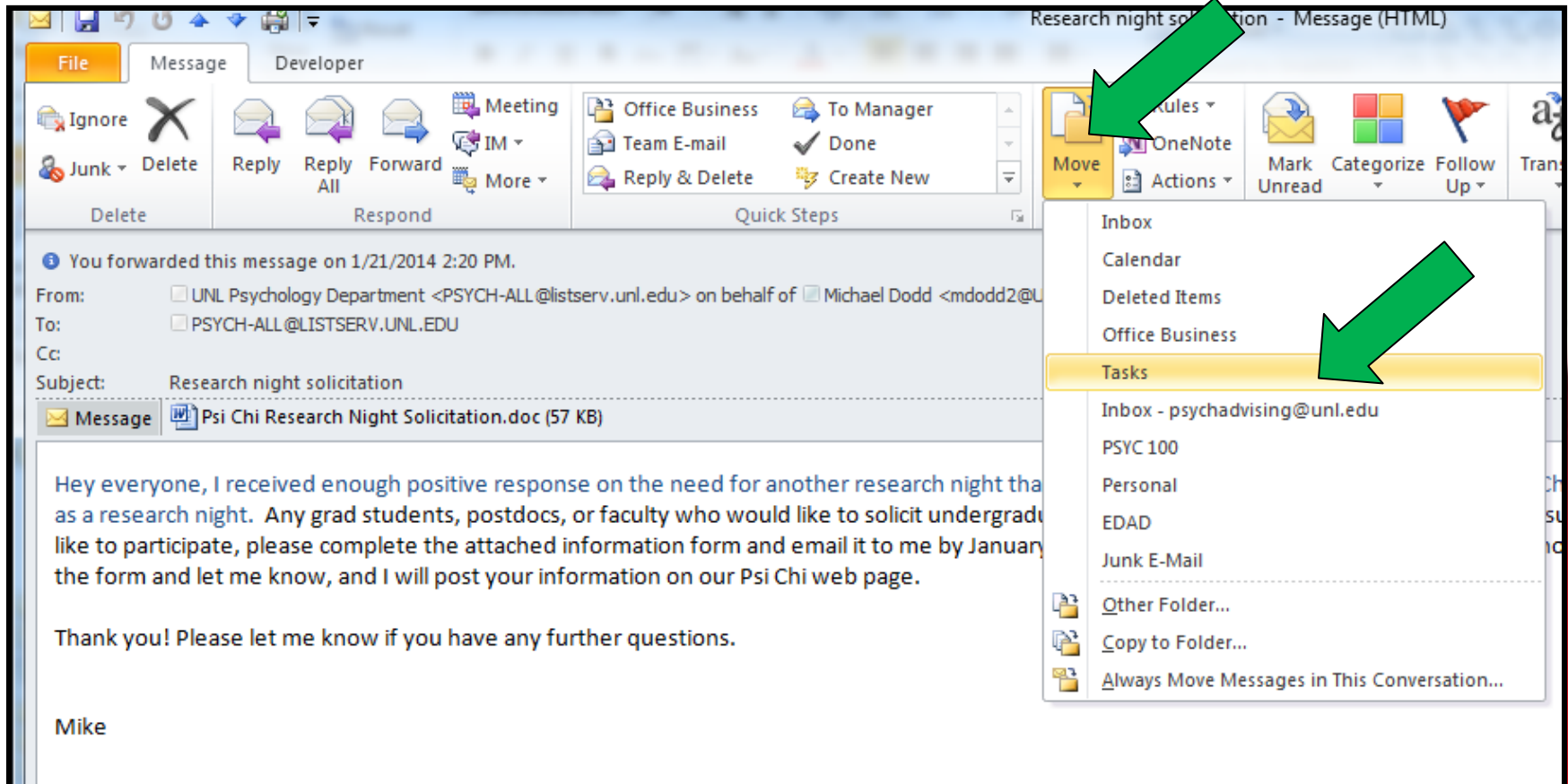
- Due in 3 days.**
- b: PSYC 100** (Location) | **a: Immediate Tasks** (Category)
- Subject:** Create Sign-In Sheets
- Start date:** None | **Status:** Not Started
- Due date:** Fri 1/24/2014 | **Priority:** Normal | **% Complete:** 0%
- Reminder:** None | **Owner:** Celeste Spier

Task description:

Create PSYC 100 roster
Wait until after Drop/Add date
Send Excel sheet to Rachelle to create



Email and Tasks

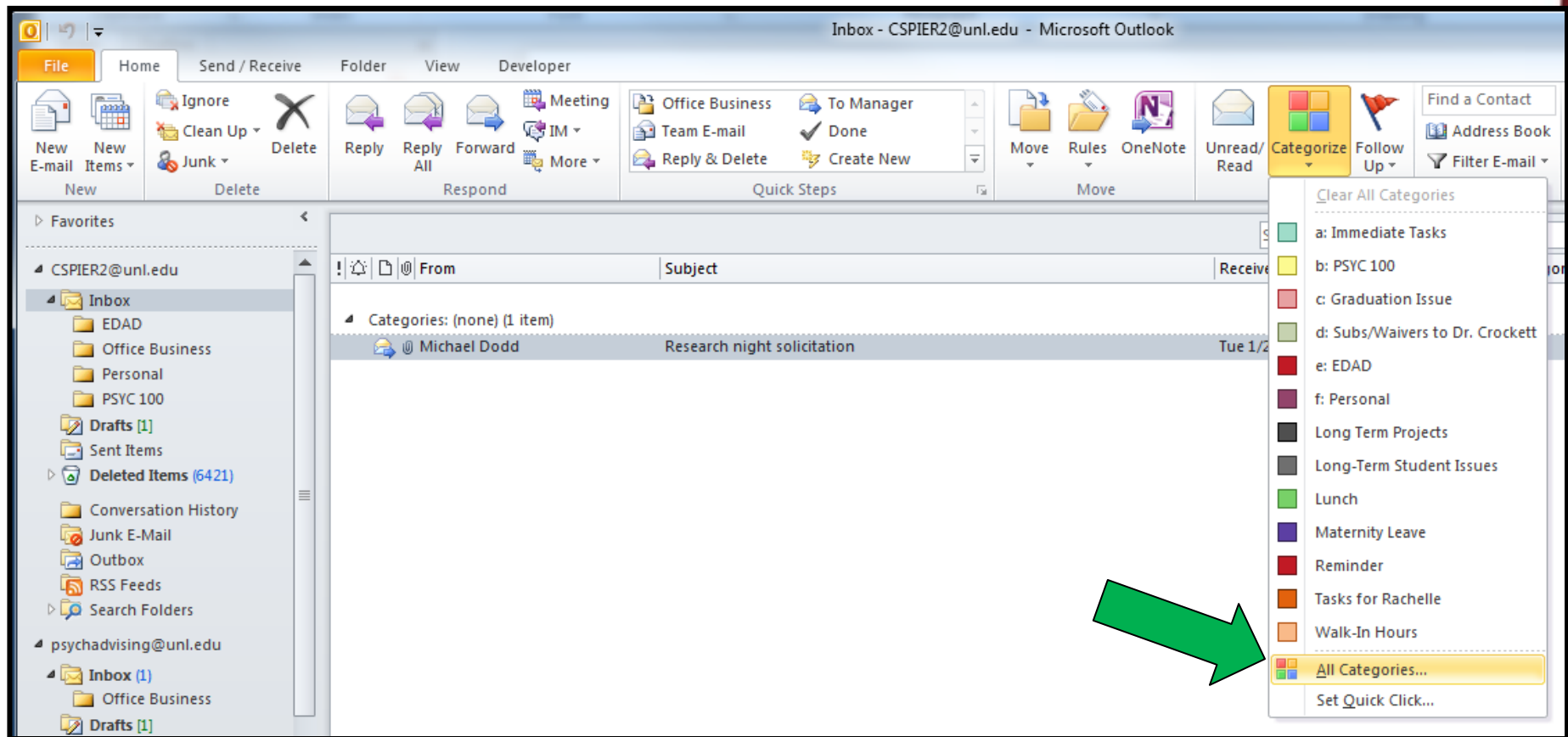


The screenshot shows an Outlook window titled "Research night solicitation - Message (HTML)". The ribbon includes "File", "Message", and "Developer" tabs. The "Message" tab is active, showing options like "Ignore", "Delete", "Reply", "Reply All", "Forward", "Meeting", "IM", "More", "Office Business", "Team E-mail", "Reply & Delete", "To Manager", "Done", "Create New", "Rules", "OneNote", "Actions", "Mark Unread", "Categorize", and "Follow Up". A "Move" dropdown menu is open, listing folders: "Inbox", "Calendar", "Deleted Items", "Office Business", "Tasks" (highlighted in yellow), "Inbox - psychadvising@unl.edu", "PSYC 100", "Personal", "EDAD", "Junk E-Mail", "Other Folder...", "Copy to Folder...", and "Always Move Messages in This Conversation...". Two green arrows point to the "Move" button and the "Tasks" folder. The email content includes a forwarded message notice, a "From:" field with "UNL Psychology Department <PSYCH-ALL@listserv.unl.edu> on behalf of Michael Dodd <mdodd2@unl.edu>", a "To:" field with "PSYCH-ALL@LISTSERV.UNL.EDU", a "Subject:" field with "Research night solicitation", and an attachment "Psi Chi Research Night Solicitation.doc (57 KB)". The main body text reads: "Hey everyone, I received enough positive response on the need for another research night than as a research night. Any grad students, postdocs, or faculty who would like to solicit undergrads who like to participate, please complete the attached information form and email it to me by January 15th. Fill out the form and let me know, and I will post your information on our Psi Chi web page. Thank you! Please let me know if you have any further questions. Mike".



Categories

- Can be used in Email, Calendar, and Tasks to organize by topic.



Templates

- Email (Demo/Example)
- Advising Notes (Demo/Example)



Shortcuts

- Control X = Cut
- Control C = Copy
- Control V = Paste
- Control A = Select All
- Control P = Print

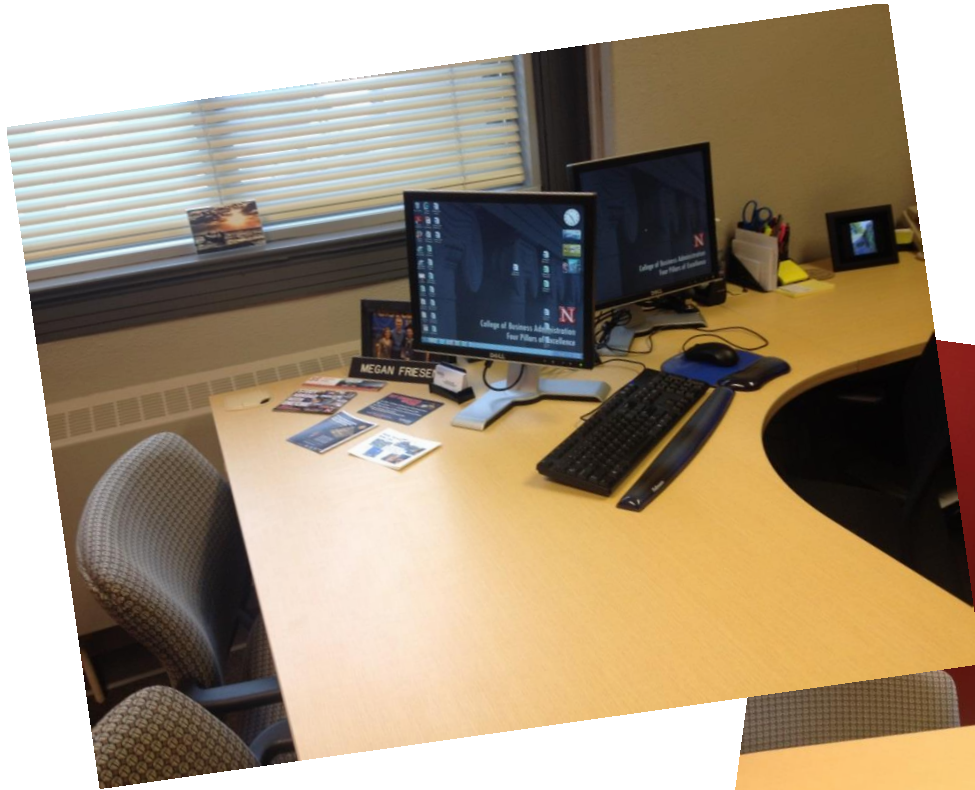
Examples:

Type email response > Control A > Control C > Switch to MyPlan > Control V.

Type notes in Word Document during appointment > Control A > Control C > Switch to MyPlan > Control V.



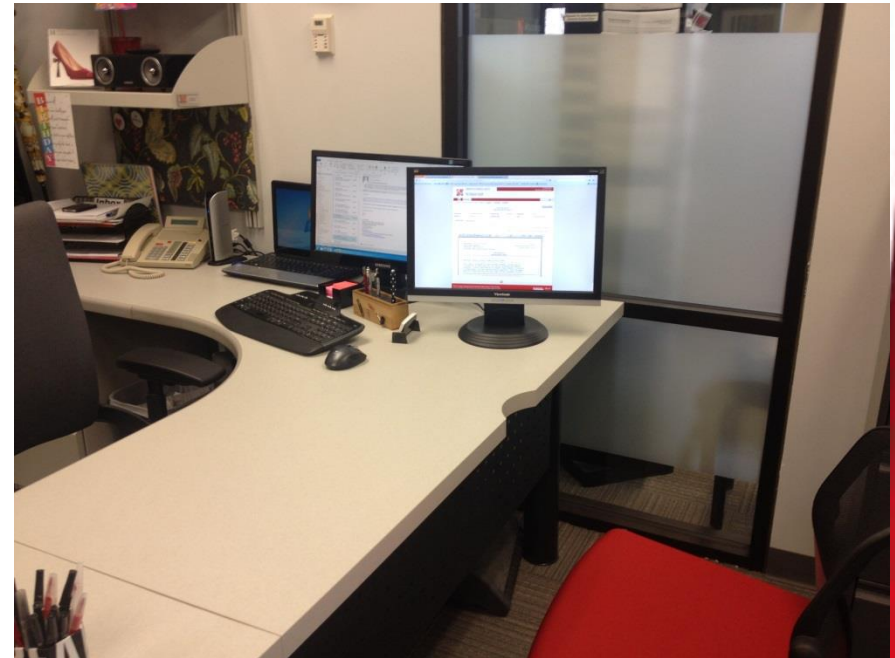
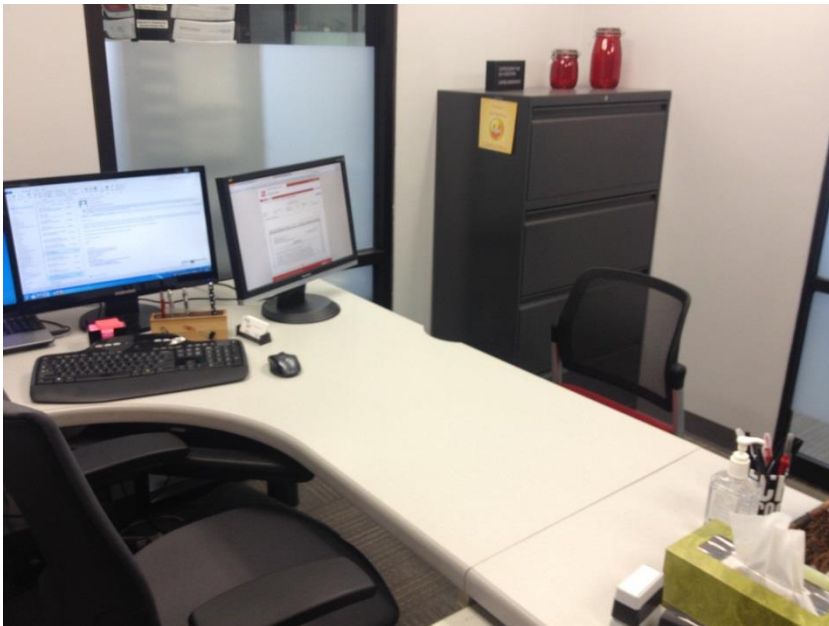
Office Setup- Courtesy of Megan Friesen CBA



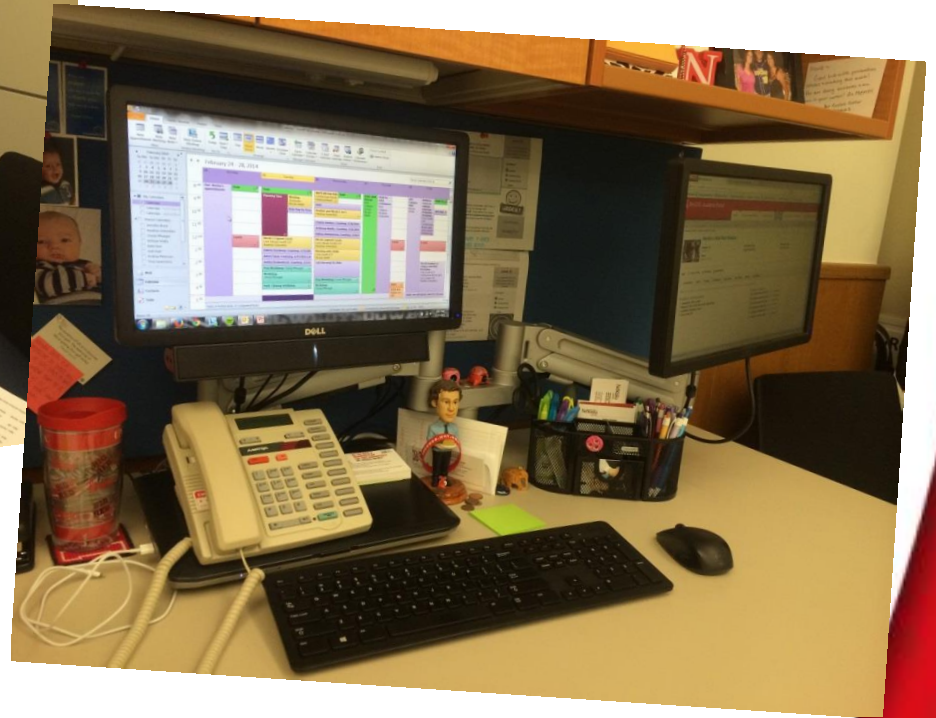
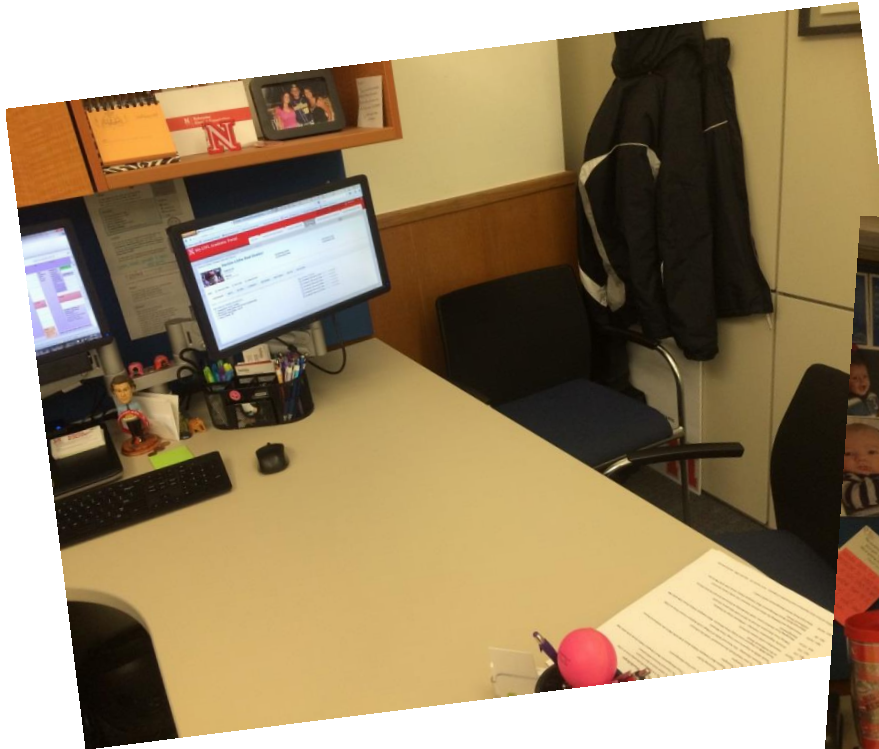
Office Setup- Courtesy of Kayla Person- ENGR



Office Setup- Courtesy of Christina Fielder- ASC



Office Setup- Nicole Smith- FYE & TP



Role Play

- [Advisor Student Meeting](#)
- Thanks to Paul Breitreutz and Joey Lynch!!!



Sample MyPLAN Email

From: myplan@unl.edu
To: MyPlan
Cc:
Subject: [MyPLAN-Test] Cody Hamilton: spring class

The following note has been added to your student folder by Paul Breitreutz:

POLS 160 (international relations) - 3
ENGL 150 - 3
ACE 7 - 3
SPAN 101 - 5

To follow-up on this note, please contact Paul Breitreutz at myplan@unl.edu.



Small Group Discussions

- What are some challenges you face in integrating technology and advising?
- What are you currently using that is working well?
- How have you overcome the initial discomfort of typing while the student is present?
- What are common emails that you are constantly answering that you could create a template for?
- What is one thing you could implement within the next week that could make your life easier?



Large Group Discussions



Click to edit or add your credits



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