Graduate Student Tracker for George W. Woodruff **School of Mechanical** Engineering **ME Graduate Student Experience** Portal

August 2024



Training Agenda for Graduate Students

The training topics covered in this deck include:

- ME Graduate Student Tracker Platform Overview
- Sign-in Instructions
- Navigating the ME Graduate Student Experience Portal
- Forms Submission
- Notifications & Forms Tracking
- Support Resources



Learning Objectives

After attending this workshop or reviewing the presentation deck, you will be able to:

- Understand the business objectives and project scope
- Login and navigate the ME Graduate Student Experience Portal
- Understand how each stakeholder group engages and uses the solution
- Submit New Form
- View your Student Submitted Forms
- How to get support



ME Graduate Student Tracker App Overview



Project Overview

Business Objectives

- Replace an aging system that addresses data security and compliance
- Modernize the system and improve the overall service and user experience for the faculty, graduate students and student services staff

Project Scope

- Design and implement an integrated solution using Salesforce that meets customer needs and improves productivity
- Automate forms submission, approval process and forms status visibility to stakeholders
- Deliver more up-to-date data and data integrations
- Reduce manual processes
- Improve reporting capabilities
- Provide training or onboarding materials to stakeholders



Thanks To Our ME Functional & IT Teams

Extending sincere appreciation to our dedicated functional team:

Glenda Johnson, Academic Advising Manager **Camellia Henry**, Academic Advisor II Katherine Drake, Academic Advisor I

Stephen Fuller, Director, Information Technology Marlena Frank, Academic & Research Support Engineer Lead **Ranjini Unnikrishnan**, Application Developer, Senior

- Their exceptional teamwork, expertise, and unwavering commitment to excellence play a crucial role in driving our success.
- Thank you for being pivotal members of our accomplished functional and IT team; your collective efforts are truly valued.



GRADUATE STUDENT TRACKER APP Mechanical Engineering

Meaningful Student Record

Staff has a holistic view into a student's record.

Student Form Management

Staff can view submitted student forms and have visibility into a form's approval progress.

Helpful Automation

Staff, faculty, and students automatically receive communication throughout a form's approval process, including reminders.

Effortless Collaboration and Notes

Staff can collaborate with each other while logging notes, phone calls, and sending emails, ensuring no interaction is lost.

Data Visualization

Staff can view student and form data holistically, making data driven decisions on where and how to act.



GRADUATE STUDENT EXPERIENCE PORTAL Mechanical Engineering

Student Form Submission

Students can quickly submit forms for approval with validation happening at the time of submission.

Status Visibility

Students can see in real-time the status of their form and who has interacted with it.

Automated Notifications

Students received automated notifications related to how a form is progressing through approval.





FACULTY FORMS EXPERIENCE PORTAL Mechanical Engineering

Student Form Approval Faculty can easily review and approve student forms.

Automated Notifications

Faculty received automated notifications related to how a form is progressing through approval, including reminders when the approval of a student form is overdue.



Graduate Forms Approvals

| A COMPANY | 000 | 100000 | . (🕰 | 0.11 | | |
|-----------|-----|--------|-------|------|--|--|

| My Approvals | | Q. Search this list | |
|----------------------------------|-------------------------|---------------------|---|
| 5 of 45 items • 0 items selected | | | |
| Student Name | ∽ Form | ✓ Date Submitted | ~ |
|) Student Fatiha | PhD MP Program of Study | 5/13/2024, 02:46 PM | |
| Student Fatiha | Change of Advisor | 5/14/2024, 11:44 AM | |
|) Student Fatiha | PhD MP Program of Study | 5/14/2024, 01:27 PM | |
| Student Fatiha | Change of Advisor | 5/14/2024, 01:54 PM | |
| Student Fatiha | Change of Advisor | 5/14/2024, 01:56 PM | |
| Student Fatiha | Change of Advisor | 5/14/2024, 02:22 PM | |
| Student Fatiha | Change of Advisor | 5/14/2024, 02:37 PM | |
| Student Fatiha | Change of Advisor | 5/14/2024, 02:41 PM | |
| Student Fatiha | Change of Advisor | 5/15/2024, 09:01 PM | |
| Student Fatiha | Change of Advisor | 5/15/2024, 09:04 PM | |



ME Grad Tracker Project Overview



Sign-In Instructions



Graduate Student Experience View: Signing In

1. Enter

https://student.gradforms.me.gatech.edu / in the address bar

- 2. You will be redirected to Georgia Tech Login Service.
- 3. Enter your GT credentials.
- 4. Select Login.

Reminder: this will be live on 8/13/24.



| Enter your GT Account and Password Login requested by: Idp.gatech.edu GT Account: | ATTENTION. When you are finished using all of your authenticated applications, please log out of this system and exit your browser to ensure you do not leave any of your applications (such as your e- mail) open to other users of this machine. |
|---|---|
| gburdell27 | TERMS OF USE |
| Password | This computer system is the property of the Georgia Institute of Technology. Any user of this system must comply with all institute and |
| | Board of Regents policies, including the Acceptable Use Policy, Cyber Security Policy and Data Privacy Policy (http://tit.gatech.edu/it. |
| Warn me before logging me into other sites. LOGIN clear | policies). Users should have no expectation of privacy as any and all files on this system may be intercepted, monitored, recorded, copied, inspected, and/or disclosed to authorized personnel in order to meet Institute obligations. By using this system, I acknowledge and consent to these terms. |
| | I don't know my GT Account |
| | I don't know my password |
| | My correct username and password aren't working |
| | For assistance, please contact the <u>OIT Technology Support Center</u> at 404-894-7173 (Mon-Fi Barn-5:00pm ET) |
| | Additional documentation including how to integrate your application with GT Login |

5. You will have three options on multifactor authenticated.

NOTE: If you are not using your personal device, it is not recommended to remember for 7 days.



Graduate Student Experience View: Home Screen

Once you have successfully authenticated, you will be redirected to ME Graduate Student Experience Portal.





Note: If you receive this error message, please submit a help request ticket via ServiceNow. <u>Support@me.gatech.edu</u>



ME Graduate Student Experience Portal

The ME Grad Student Experience Portal provides students with the ability to submit forms and view their submitted forms status.





Navigating The ME Graduate Student Experience Portal



Graduate Student Experience View: Home Screen

| Georgia Tech. | |
|---|---|
| 2 Search 1 Home My Forms Submit A Form 3 | Search 😥 ANTERSTING 🕶 |
| George W. Woodruff School of Mechani | cal Engineering |
| Submit and view the status of stud | ents forms |
| | 4 MY AWAITING APPROVAL FORMS 2024-07-25 Change of Advisor |
| | 2024-07-26 PhD ME Program of Study |
| | 2024-07-29 MSMP Program of Study |
| My Forms Submit A Form | View All |
| | 2024-07-25 Room Key Request |
| | 2024-07-26 JOINT MS Program of Study |
| | 2024-07-29 Special Problem 2024-08-02 M.S. Thesis Presentation |
| | View All |
| | |
| | 2024-07-26 MSME Program of Study |
| | 2024-07-29 Approval of Masters Thesis Topic |
| | 2024-07-29 MSNE Program of Study |
| | 2024-07-29 PhD NRE Program of Study |
| | View All |

- **1-Home** -Takes the Student back to the main Graduate Student Experience homepage.
- 2- My Forms View the history of all your Submitted Forms by status.
- 3- Submit A Form This is the starting point for any Form Submission.

4- Quick glanced of different list views:

- My Awaiting Approval Forms
- $\circ \quad \text{My Approved Forms}$
- My Denied Forms



Graduate Student Experience View: List View

| Ho St M | me My Forms Submit A Form udent Forms ly Awaiting Approval Forms | | | | O seek this | | | • | _ | | | |
|---------------|--|-----------------------------------|-------------------------|--------|-----------------|------------|--------|-------|-------|-----|---|---|
| items • S | orted by Student Form Name • Filtered by My stud | lent forms - Status • Updated a f | ew seconds ago | | Q Search this i | st | | têt A | | G | U | Ť |
| | Student Form Name 1 | Submitted Date | Туре | ✓ Stat | tus 🗸 | First Ap 🗸 | Second | i v | Third | A ~ | - | |
| 1 | 2024-07-25 Change of Advisor | 7/25/2024, 3:47 PM | Change of Advisor | Awa | aiting Approval | | | | | | | |
| 2 | 2024-07-26 PhD ME Program of Study | 7/26/2024, 4:22 PM | PhD ME Program of Study | Awa | aiting Approval | | | | | | | |
| 3 | 2024-07-26 Room Key Request | 7/26/2024, 1:13 PM | Room/Key Request | Awa | aiting Approval | | | | | | | |
| 4 | 2024-07-29 MSMP Program of Study | 7/29/2024, 10:12 AM | MSMP Program of Study | Awa | aiting Approval | | | | | | T | |



Tech

Graduate Student Experience View: My Profile

- Profile Located in the top right will gives access to basic student information, such as full name, email, phone number, mobile, home address.
- Logout

| Georgia Tech | | | | | | |
|------------------------|-----------|-----|------------------------|--------|--------------------|---|
| | | | | | | |
| s | earch | | | Search | 😥 Student Fatiha 🔻 | |
| | | | | | 50000 | |
| Home My Forms Subm | it A Form | | | | | |
| | | | | | | 1 |
| | | | a | | | |
| Name Student Fatiha | | Ema | ali ura3@gatech.edu | | | |
| Phone | | Mot | bile | | | |
| Address | | | | | | |
| | | | | | | |



🔍 Student Fatiha 🔻

•

Home

My Profile

My Account

How To Submit A Form



Submit A Form

| C Georgi | a Tech. | | | |
|--|-------------|----------------|---------------|--|
| Searc 1 Home My Forms Submit / | h A Form | 2 | | |
| * Form Type | | 1 | | |
| None | | | | |
| -None- Admission to Ph.D. Candidacy Approval of Master's Thesis Topic Change of Advisor JOINT MS Program of Study M.S. Thesis Presentation ME Fellowships MSME Program of Study MSMP Program of Study MSNE Program of Study Ph.D. Dissertation Defense Ph.D. Proposal Presentation PhD ME Program of Study PhD MP Program of Study PhD MP Program of Study PhD NRE Program of Study Room/Kev Request | | | | |
| Seminar Request Special Problem Submit Publications and Awards | | | Search | |
| Teaching Assistant Contract | | | | |
|) | Home | My Forms | Submit A Form | |
| / | * Form Type | 0 | | |
| / | M.S. Thesi | s Presentation | | |

1- Click on the Submit A Form Tab.

2- Click on Form Type drop down, select a form.

3- Click Next.

NOTE: Forms are **locked** upon submission. Please check all details carefully before submitting to ensure all required fields are completed and to prevent any delays in approval.

| vards t | | Search | | | | ÷ | Student Fatiha 🔻 |
|------------|---|---------------|--|--|---|---|------------------|
| | Home My Forms | Submit A Form | | | | | |
| | * Form Type (1) M.S. Thesis Presentation | | | | | | * |
| | | | | | | | 3 - Next |
| | | | | | _ | | |



Example: M.S. Thesis Presentation

| Home My Forms Submit A Form | |
|--|-----|
| M.S. Thesis Presentation Form | |
| *Thesis Presentation Date & Time | |
| Aug 31, 2024 📾 10:30 AM 🕥 | |
| Please enter some valid input. Input is not optional. | |
| * Preferred Building Location | |
| MARC Building | ÷ |
| Please select a choice. | |
| Room # | 5 |
| 123 | |
| Thesis Title (Please Use Upper and Lower Case Letters) | |
| Test Thesis 1 | |
| | |
| Summary 0 | 5 |
| Test Summary Tes | -li |
| Next Add Composition Members | |
| Next Add Committee Members | |

After selecting the Form Type, a new screen will appear.

- 1. Provide the Thesis Presentation Date & Time.
- 2. Preferred Building Location.
- 3. Add a Room # and Thesis Title.
- 4. Include a Summary.
- 5. Select "Next Add Committee Members"

Note: Mandatory fields are denoted by an asterisk (*).



Example: M.S. Thesis Presentation

| Home My Forms Submit A Form | |
|--|--------|
| N.C. Thesis Descentation Form | |
| M.S. Thesis Presentation Form | |
| | |
| Committee member name should be in the format of either of the following: Dr. George Burdell of Prof. George Burdell | |
| *Committee | |
| Dr. Smith | |
| *Role | |
| Chair | ¢ |
| * Department | |
| ME | |
| | Remove |
| | |
| | |
| Prof Dana V | |
| +Dela | |
| Co-Chair | |
| t Department | • |
| ME | |
| | 0 |
| | Remove |
| | |
| + Add | |
| | 3 |
| | Save |

Add the first committee member details: Committee Name, Role and department.

- 1- Select Add: To include all Committee members with their details.
- **2- Remove:** Removing a committee member if you don't want to add them.
- 3- Save: Save the committee members.

NOTE: Committee Members may include individuals who are internal to Georgia Tech or external.



Form Submission Confirmation

After saving the form, a confirmation screen will appear with the details about the form.

| | Submit A Form | | | | | | | | | |
|---|--|--------------|---|----------|--|--|--|--|--|--|
| Thank you for submitting the M.S Thesis Presentation form | | | | | | | | | | |
| You will be sent email confirmation when your faculty advisor and director of student process your request. | | | | | | | | | | |
| | Your submission is as follows. | | | | | | | | | |
| | | | | | | | | | | |
| Student Form | | | | | | | | | | |
| GTID | 654322765 | | | | | | | | | |
| Contact Display Name | t Display Name Student Fatiha | | | | | | | | | |
| Presentation Date & Tin | entation Date & Time 🕕 8/31/2024, 10:30 AM | | | | | | | | | |
| Preferred Building Loca | ition MARC Building | | | | | | | | | |
| Other 🕕 | | | | | | | | | | |
| Room # | 123 | | | | | | | | | |
| Thesis Title | Test Thesis 1 | | | | | | | | | |
| Summary 🚺 | Summary 1 Test Summary Test Sum | | | | | | | | | |
| Committee Memb | pers | | | | | | | | | |
| Name | | ∽ Department | ~ | Role ~ | | | | | | |
| 1 Dr. Smith | 1 | ME | | Chair | | | | | | |
| | | ME | | Co-Chair | | | | | | |

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Notifications & Forms Tracking



Submission Confirmation Email

After you submit the form, you will receive an email. This email will serve as a record of your submission and will include a link to the form.

| GWW Student Services <gww-student-services@me.gatech.edu> To: To: Fatiha</gww-student-services@me.gatech.edu> | -┿- 🙂 ••• Fri 8/9/2024 11:48 AM | | | | | | |
|---|--------------------------------------|--|--|--|--|--|--|
| Dear Student Fatiha, | | | | | | | |
| Your M.S. Thesis Presentation request has been submitted. | | | | | | | |
| You may check the status of your submission at: <u>https://gatech</u> <u>qa.sandbox.my.site.com/graduatestudent/s/detail/a4b4C000000A9VG</u> | | | | | | | |
| Thanks, The Office of Student Services | | | | | | | |
| ← Reply → Forward | | | | | | | |



Form Detail Page

Clicking the link in the confirmation email will take you to the Details Page of the form. Here, you can see the Status as "**Awaiting Approval**"

| Home My Forms S | Submit A Form | | | | | | |
|-----------------------------|---|--|--|--|--|--|--|
| Student Form | | | | | | | |
| GTID | 654322765 | | | | | | |
| Contact Display Name | Student Fatiha | | | | | | |
| Status | Awaiting Approval | | | | | | |
| Presentation Date & Time 🕚 | 8/16/2024, 9:38 AM | | | | | | |
| Preferred Building Location | MARC Building | | | | | | |
| Other () | | | | | | | |
| Room # | 2m # 123 | | | | | | |
| Thesis Title Test Thesis 1 | | | | | | | |
| Summary 📵 | Summary Test 1 Summary Test | | | | | | |
| Committee Members | | | | | | | |
| Name | ✓ Department ✓ Role ✓ | | | | | | |
| 1 Dr. Smith | ME Chair | | | | | | |
| 2 Prof. Dana V | ME Co-Chair | | | | | | |
| | | | | | | | |



Form Approval Email

You will receive an email notification once the request is **Approved**. The example shown below will contain a link to your form for easy access.

Note: If you wish to retain the comments made, do not delete the email notification.

| GS GWW St To: • | ident Services <gww-student-services@me.gatech.edu> Fatiha</gww-student-services@me.gatech.edu> | - <u>\</u> | ٢ | | | ∂ Sat 8 | │ 😍 🔗 /10/2024 9 |) 9:47 AM | |
|--------------------|---|-----------------------|-------------|------|--------------|------------|---------------------|--------------|--|
| | Dear Student Fatiha, | | | | | | | | |
| | We are pleased to inform you that your M.S. Th Presentation Request has been approved. | esis | | | | | | | |
| | Approval Comments (if any): Your request is approved. | | | | | | | | |
| | If you have any questions, please contact the Office of Student Services at: gww-student-services@me.gatech.edu | | | | | | | | |
| | You may check your submission at: <u>https://gategasandbox.my.site.com/graduatestudent/s/deta</u> | <u>ch</u> uil/a4b4 | <u>4C00</u> | 0000 |) <u>A9h</u> | 0 | | | |
| | Sincerely, | | | | | | | | |
| | The Office of Student Services | | | | | | | | |
| | | | | | | | | 1 | |

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Approved Requests

Clicking the link will take you directly to the Details Page of the form where you can see the status updated from "**Awaiting Approval**" to "**Approved**".

| Home My Forms S | Submit A Form |
|-----------------------------|---|
| Student Form | |
| GTID | 654322765 |
| Contact Display Name | Student Fatiha |
| Status | Approved |
| Presentation Date & Time 🚯 | 8/16/2024, 9:38 AM |
| Preferred Building Location | MARC Building |
| Other 🚯 | |
| Room # | 123 |
| Thesis Title | Test Thesis 1 |
| Summary | Test Summary Test |
| Committee Members | |
| Name | ✓ Department ✓ Role ✓ |
| 1 Dr. Smith | ME Chair |
| 2 Prof. Dana V | ME Co-Chair |
| | |



Form Denial Email

If a request is denied, the student will receive an email to inform them of the status and reason. An example of the email with a link to the form is shown below.

| | GS GWW Student Services To: • Fatiha | <gww-student-services@me.gatech.edu></gww-student-services@me.gatech.edu> | ÷ | ٢ | £ | « | \rightarrow | 😻 9 Sat 8/10 | 80 ••• 10:02 AM |
|---|---|--|--------------|------|-------------|---|---------------|-----------------|--------------------|
| ł | | Dear Student Fatiha, | | | | | | | |
| | | Your M.S. Thesis Presentation request has been DENI | ED. | | | | | | |
| 1 | | Comment: | | | | | | | |
| | | Please contact the Office of Student Services at gww-student- services@me.gatech.edu to find out the reason for the denial. | | | | | | | |
| | | You may check the status of the form: https://gatech qa.sandbox.my.site.com/graduatestudent/s/detail/a4b4 | <u>.C000</u> | 0004 | <u>\9hU</u> | | | | |
| | | Sincerely, | | | | | | | |
| | | The Office of Student Services | | | | | | | |



Denied Requests

Clicking the link will take you to the Details Page of the form where you can see the status update from "**Awaiting Approval**" to "**Denied**".

| Home My Forms S | Submit A Form | | | | |
|-----------------------------|--|--|--|--|--|
| Student Form | | | | | |
| GTID | 654322765 | | | | |
| Contact Display Name | Student Fatiha | | | | |
| Status | Denied | | | | |
| Presentation Date & Time 🕚 | 8/16/2024, 9:38 AM | | | | |
| Preferred Building Location | MARC Building | | | | |
| Other (1) | | | | | |
| Room # | 123 | | | | |
| Thesis Title | esis Title Test Thesis 1 | | | | |
| Summary 🚯 | Summary Test 1 Summary | | | | |
| Committee Members | | | | | |
| Name | ✓ Department ✓ Role ✓ | | | | |
| 1 Dr. Smith | ME Chair | | | | |
| 2 Prof. Dana V | ME Co-Chair | | | | |



Support Resources

Support Model Email Recommendations



Get Help After Go-Live: August 13

ME IT and OIT-CRM Services are hosting virtual Office Support time in August for users who may need help or have questions after the new service is in production.

Feel free to drop-in to ask questions and get support at **Daily** Virtual Drop-In Support.

Virtual Office Support will be held beginning August 13 – August 30 twice daily:

- 9:00 9:30 am
- 12:30 1:00 pm

If you are unable to attend these session, please submit a ticket to

- Business Process: <u>gww-student-services@gatech.edu</u>
- Technical Issues: <u>support@me.gatech.edu</u>



How To Get Support

On 8/13/2024, ME Grad Student Tracker will be in production.

End Users can get support from the following Functional and IT teams:

| Support Model | Typical User Support Issues | Contact |
|--|--|--|
| Office of Student Services (Tier 0) | I don't know how to submit a form I need training or job aids. My form hasn't been approved yet | Business process questions should be sent to <u>gww-student-</u> <u>services@gatech.edu</u> |
| ME IT (Tier 1) | I can't log into ME Grad Tracker I am getting an SSO error message I can't access the Faculty Forms Site I'm getting the following error message I don't see my assigned grad students | support@me.gatech.edu Tickets will be assigned and addressed as quickly as possible |
| OIT CRM Services (Tier 2) | Platform and other support tickets will be escalated from ME teams | ME IT or OSS will reassign support tickets to the OIT "Salesforce Core Team". Tickets will be assigned and address as quickly as possible. |
| Salesforce Support (Tier 3) | OIT will engage Salesforce to address platform issues that they are unable to resolve. | |



PSA: Emailing from ME Grad Student Tracker

| Audience | Recommendations |
|----------------------|---|
| All Users | Add <u>gww-student-services@me.gatech.edu</u> to your Outlook safe senders list to ensure messages sent from ME Grad Tracker are not blocked. |
| All Users | Bookmark your app or portal site to easily access the service. Faculty Forms Portal: <u>https://faculty.gradforms.me.gatech.edu/</u> Student Experience Portal: <u>https://student.gradforms.me.gatech.edu/</u> ME Staff Portal: <u>https://gatech.my.salesforce.com</u> |
| Graduate Students | Email sent from ME Student Tracker is guaranteed to be delivered to student's official Georgia Tech mailbox |
| Graduate Students | Students may "Store and Forward" their email to a 3rd party email provider, such as Gmail, Yahoo, etc. |
| Graduate Students | Periodically check Junk and Spam folders to train other mail provider's filtering software to accept mail sent from <u>*@gatech.edu</u> mail addresses by marking the 3rd party mail "Not Junk/Spam" to avoid missing important forwarded email. |

Forms & Support Information for Graduate Students

ME Graduate Students can find support documentation and links to the <u>Student</u> <u>Experience Portal</u> directly from <u>Graduate Program Forms | George W. Woodruff</u> <u>School of Mechanical Engineering (gatech.edu)</u>

ME Graduate Forms Platform

The legacy graduate forms system is being replaced with a new Salesforce platform. The new platform will go live on **August 13th**. Please see the support documentation linked below for instructions on how to use the new platform.

ME Graduate Forms

If you have any questions, please email <u>support@me.gatech.edu</u> (technical queries) or <u>gww-student-services@me.gatech.edu</u> (for form filling or course enquiries).

Support Documentation

General Forms

- <u>Change of Advisor Form</u> (Login)
- Outside Employment Request for GWW
 Graduate Students (DOC)
- <u>Special Problems Form</u> (Login)

Master's Degree Forms

- Proposed MSME Program of Study (Login)
- <u>Proposed NE Master's Program of</u> <u>Study</u> (Login)
- Proposed MP Master's Program of Study (Login)

PhD Degree Forms

- Doctoral Teaching Intern
 <u>Application (</u>DOC)
- Seminar Registration Form (Login)
- Teaching Practicum Request (Login)

Dates to Remember for Pre-Go-Live Support

| Support Opportunities | Dates | Information |
|---------------------------------------|-----------------|--|
| Legacy Tracker Freeze Date | August 8, 2024 | Faculty Advisors: Complete Existing Forms by 8/8* Grad Students: No New Form Submissions Allowed after 8/7 |
| Graduate Student Support Materials | August 9, 2024 | Support Document will be available at Graduate Program Forms George W. Woodruff School of Mechanical Engineering (gatech.edu) |
| Go-Live | August 13, 2024 | |

*Any forms that are not approved by will need to be resubmitted in the new system after August 13.



Thank You!

