

GradesFirst Product Updates

Summer 2018

Thanks for checking in to see what's new in the upcoming updates. This document shares the updates planned for the forthcoming updates. These features will be turned on in your training site on Friday, May 11th and in your production site on Monday July 9th. By enabling these features, we can ensure that the entire membership is benefiting from the most up-to-date technology.

Administration

- Administration Page Restructuring
- User Role Permission Restructuring

Appointment Configurations

- Ability to Edit Name of Appointment Types & Associated Users
- Ability to Edit Text in Student Scheduling Workflow
- Ability to Customize Dead End Pages

Scheduling

- Ability to Associate Appointment with Campaign
- Allow for Weekend Appointment Scheduling
- Enhanced Screens for Walk-In Times
- Updated Location Settings for Student Scheduling

Appointment Center

- Selecting Appointment Center Locations
- Updates and Actions from Student Card in Appointment Center
- Actions from Appointment Card in Appointment Center
- Hover-Over Actions in Appointment Center
- "Drop-In Appointments" screen in Appointment Center
- "Scheduled Appointment" screen in Appointment Center



Administration

- Administration Page
- User Role Permissions

New Feature: Administration Page Restructuring

As part of this update, we've restructured the Administration page of the site to better reflect a typical workflow and create more logical groupings of backend settings.

Changes include:

- Reducing the number of sections from 8 to 6
- Reducing the number of linked pages from 41 to 38
- Updating section titles to more accurately reflect the settings included
- Reorganizing sections so that the linked pages are grouped more intuitively and align with the section title
- Bolding important linked pages

It is important to note that despite this restructuring, we have not lost any of the original functionality. **Any settings that were previously turned on will continue to remain on.**

On the next page, we have documented these changes with 'before' and 'after' screenshots.

Before:

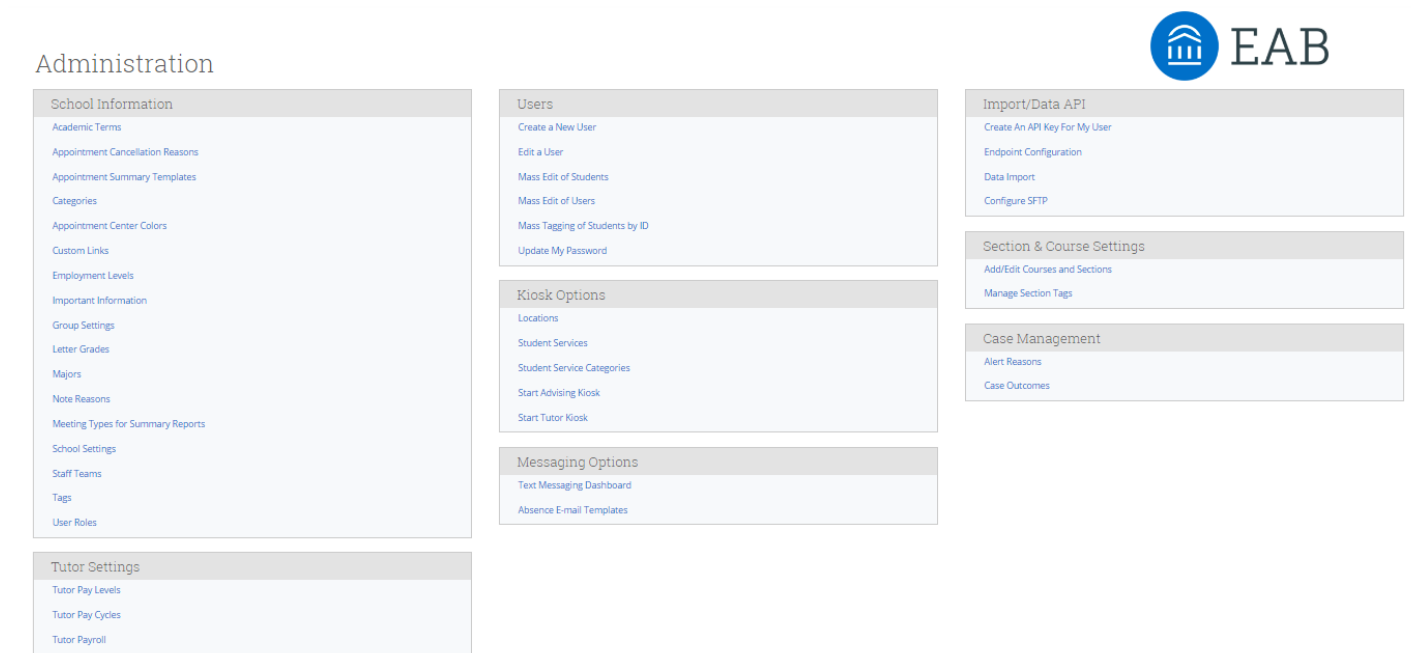
- School Information
- Tutor Settings
- Users
- Kiosk Options
- Messaging Options
- Import Data/API
- Section & Course Settings
- Case Management

After:

- Site Configurations
- Appointments
- User Management
- Data
- Imports
- Payroll

Administration Page Restructuring

Before:



Administration

School Information

- Academic Terms
- Appointment Cancellation Reasons
- Appointment Summary Templates
- Categories
- Appointment Center Colors
- Custom Links
- Employment Levels
- Important Information
- Group Settings
- Letter Grades
- Majors
- Note Reasons
- Meeting Types for Summary Reports
- School Settings
- Staff Teams
- Tags
- User Roles

Tutor Settings

- Tutor Pay Levels
- Tutor Pay Cycles
- Tutor Payroll

Users

- Create a New User
- Edit a User
- Mass Edit of Students
- Mass Edit of Users
- Mass Tagging of Students by ID
- Update My Password

Kiosk Options

- Locations
- Student Services
- Student Service Categories
- Start Advising Kiosk
- Start Tutor Kiosk

Messaging Options

- Text Messaging Dashboard
- Absence E-mail Templates

Import/Data API

- Create An API Key For My User
- Endpoint Configuration
- Data Import
- Configure SFTP

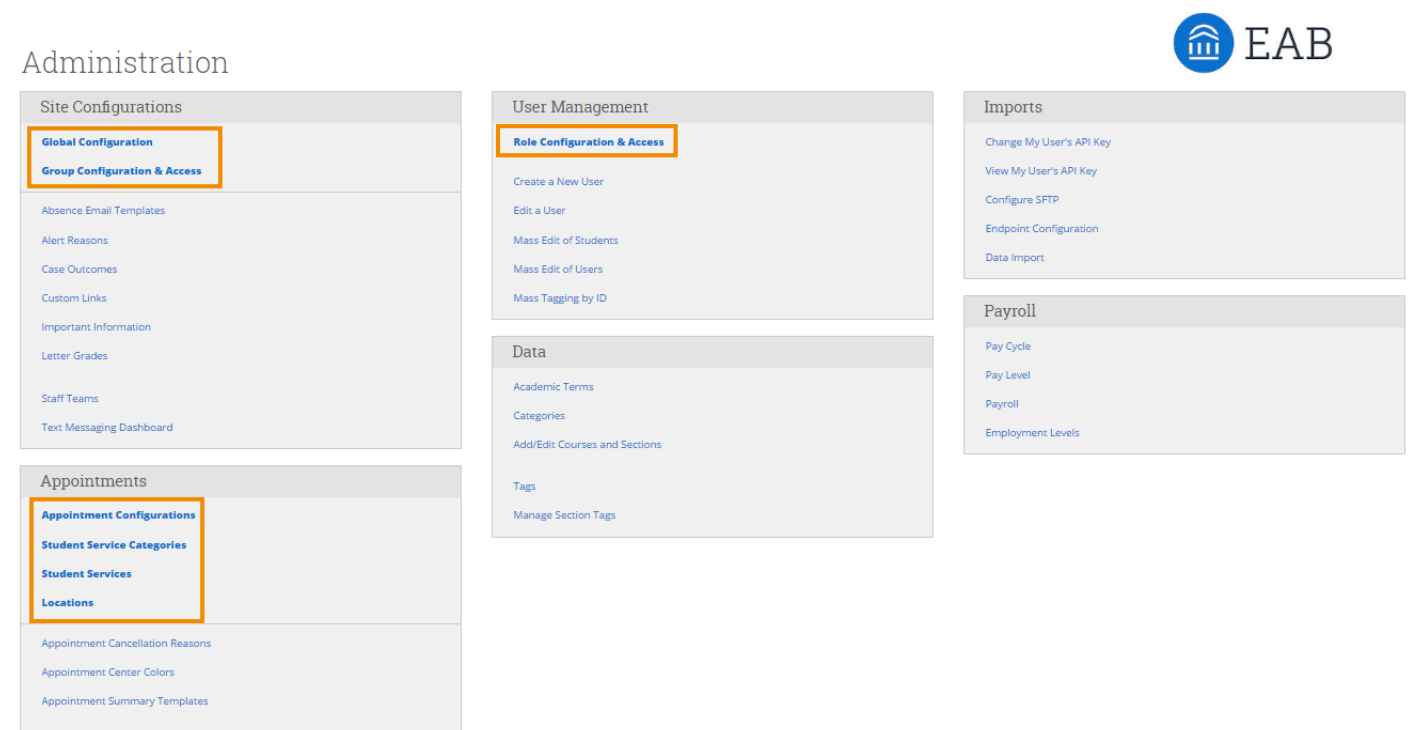
Section & Course Settings

- Add/Edit Courses and Sections
- Manage Section Tags

Case Management

- Alert Reasons
- Case Outcomes

After:



Administration

Site Configurations

- Global Configuration**
- Group Configuration & Access**
- Absence Email Templates
- Alert Reasons
- Case Outcomes
- Custom Links
- Important Information
- Letter Grades
- Staff Teams
- Text Messaging Dashboard

Appointments

- Appointment Configurations**
- Student Service Categories**
- Locations**
- Appointment Cancellation Reasons
- Appointment Center Colors
- Appointment Summary Templates

User Management

- Role Configuration & Access**
- Create a New User
- Edit a User
- Mass Edit of Students
- Mass Edit of Users
- Mass Tagging by ID

Data

- Academic Terms
- Categories
- Add/Edit Courses and Sections
- Tags
- Manage Section Tags

Imports

- Change My User's API Key
- View My User's API Key
- Configure SFTP
- Endpoint Configuration
- Data Import

Payroll

- Pay Cycle
- Pay Level
- Payroll
- Employment Levels

User Role Permission Restructuring

As part of this update, we've restructured the way permissions are organized within user roles. Our goal was to create more logical groupings based on the type of permission.

Changes you see include:

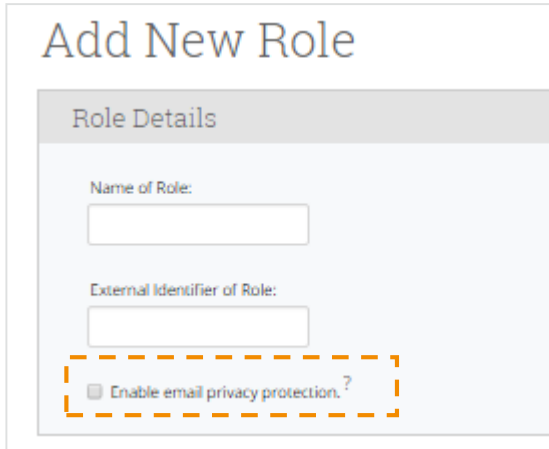
- Accessing user role permissions by clicking in to 'Role Configuration & Access' within 'User Management', instead of 'User Roles' within 'School Information'
- Changes to 'Standard User Types' depending on an update to Appointment Configurations
- Adding a new 'Data Privacy & Access' permissions suite
- Rolling up 'Early Access Features' and 'Institution Reports and GradesFirst Analytics' permissions into more appropriate groupings
- Adding a new 'Athletics' permissions suite within individual roles.

In this section, we have detailed the changes you can expect to see for each permissions 'bucket' within 'User Roles' accompanied by screenshots of the way this page was organized previously (on the left side of the dotted line) and how this page is organized currently (on the right side of the dotted line).

User Role Permission Restructuring

Edited: Role Details

- Removed 'Enable email privacy protection' option



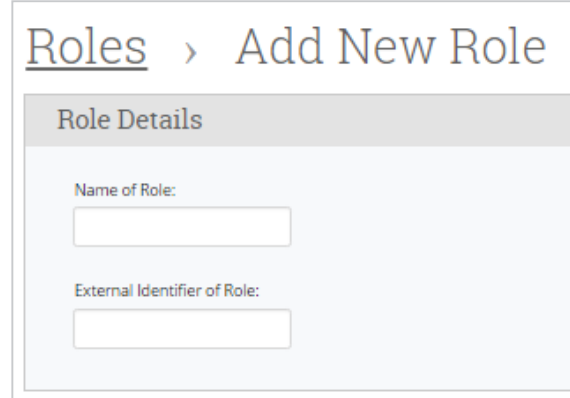
Add New Role

Role Details

Name of Role:

External Identifier of Role:

Enable email privacy protection.?



Roles > Add New Role

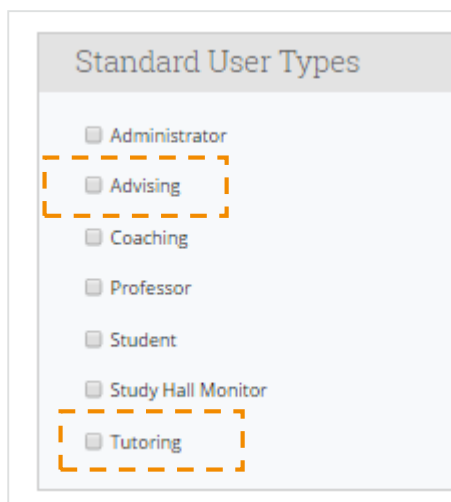
Role Details

Name of Role:

External Identifier of Role:

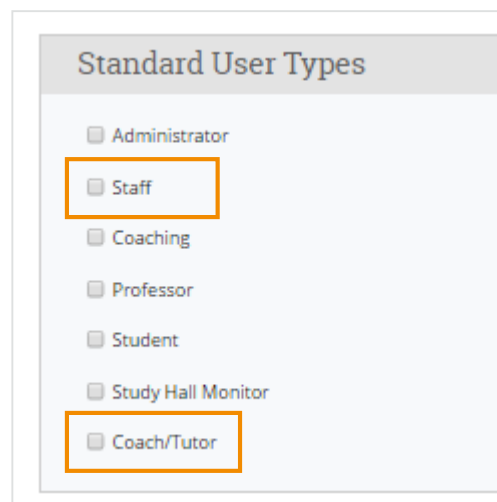
Edited: Standard User Types

- The Advising & Tutoring User Types can now be customized to change the name of the Home screen
- This can be customized through the Appointments Configuration



Standard User Types

- Administrator
- Advising
- Coaching
- Professor
- Student
- Study Hall Monitor
- Tutoring



Standard User Types

- Administrator
- Staff
- Coaching
- Professor
- Student
- Study Hall Monitor
- Coach/Tutor

User Role Permission Restructuring

Edited: Permission Sections

- Added a '**Data Privacy & Access**' section for permissions dealing with access to certain types of student information through profiles, reports, dashboards, searches, and imports
- Removed '**Tutoring**' as its own unique grouping and reassigned associated permissions
- Created '**Athletics**' as a unique grouping and reassigned permissions associated with the features most commonly used by Athletic departments
- Removed '**Early Access Features**' permissions since these are now automatically enabled or not dependent on a user role
- Relocated '**Analytics**' permissions to more appropriate groupings

Before

Permissions

- Courses & Attendance
- Non-Student Appointments & Availabilities
- Tutoring
- Conversations
- Campaigns & Travel Letters
- Study Hall, Kiosk, & Appointment/Tutor Center
- Student Info & Reporting
- Alerts & Cases
- Institution Reports and GradesFirst Analytics
- Administration
- Early Access Features
 - Next Generation Reports?
 - Advising Summary API?
 - Appointment Summary Templates

Create Role Cancel

After

Permissions

- Data Privacy & Access
- Non-Student Appointments & Availabilities
- Conversations
- Campaigns
- Study Hall, Kiosk, & Appointment/Tutor Center
- Student Info & Reporting
- Alerts & Cases
- Athletics
- Administration

Create Role Cancel

User Role Permission Restructuring

Added: 'Data Privacy & Access'

- Created a new grouping for permissions dealing with access to certain types of reports and dashboards and the ability to search and import student profiles and data

Data Privacy & Access

General

- Enable email privacy protection.?
- View Other Users Conversations
- Note View?
- View Categories for Students
- View Help Center?
- Allow User to Submit a Request to Support?

Search

- Allow User to Search
- Search For All Users
- Allow Quick Search
- Search All Students
- Advanced Search Filters
- Access to GPA filters in Advanced Search
- View enhanced search results?
- Access to Personal Information filters in Advanced Search

Import

- Data Imports
- API Access

Reports

- View Reports on Alerts for All Students
- View Reports on Cases for All Students
- View Absence Reports
- View Professor Information Reports
- View Assignment Reports
- View Enrollment Reports
- View Coach/Tutor Reports
- View Coach/Tutor Payroll Reports
- View Progress Report Reports
- Student Services Reports
- View Study Hall Reports
- Note Reports
- Student Information Reports?
- Institution Reports?
- View Analytics?
- Advising Dashboards?
- Tutoring Dashboards?
- Student Dashboards?

User Role Permissions: Data Privacy & Access

Student Profile Permissions

As part of this release, we have created permissions for each tab across the student profile page so that these can now be enabled or disabled based on a user's role within the platform.

To enable the student profile permissions please connect with your SSC Consultant. The restructuring of user role permissions does not automatically enable these student profile tabular permissions to appear.

Note: *Once enabled, the new permissions will reflect current student profile access. This means that currently if a user role has access to view a student profile then they will continue to be able to see every tab on the student profile page.*

User Role Permission Restructuring

Edited: 'Non-Student Appointment & Availabilities

- Language in this section will update if edits are made to Appointment Configurations about the naming of Advising

Before

Non-Student Appointments & Availabilities

Appointment Permissions

- Create Advising Appointment
- Create Tutoring Appointments
- Create General Appointments
- Appointment Update[?]
- Organizers Edit Their Own Appointments
Advisors and tutors can edit appointments they are in charge of.
- Appointment Delete[?]
- Organizers Delete Their Own Appointments[?]
- Create Appointments for any applicable user[?]
- Cancel Appointments or any person's Attendance to it
- Appointment Cancellation Administration[?]
- Ability for user to reset the counter for advising or tutoring appointments on a student's no show grid.

Advising Permissions

- Allow advisor to manage Advising Requests

Availability Permissions

- Availability Create
- Availability Delete
- Availability Create for Others
- Availability Delete for Others

After

Non-Student Appointments & Availabilities

Appointment Permissions

- Create Staff (advising) Appointment
- Create Academic Coaching
- Create General Appointments
- Appointment Update[?]
- Organizers Edit Their Own Appointments
Staff and Coach/Tutor can edit appointments they are in charge of.
- Appointment Delete[?]
- Organizers Delete Their Own Appointments[?]
- Create Appointments for any applicable user[?]
- Cancel Appointments or any person's Attendance to it
- Appointment Cancellation Administration[?]
- Ability for user to reset the counter for appointments on a student's no show grid.

Staff Permissions

- Allow advisor to manage Staff (advising) Appointment Requests

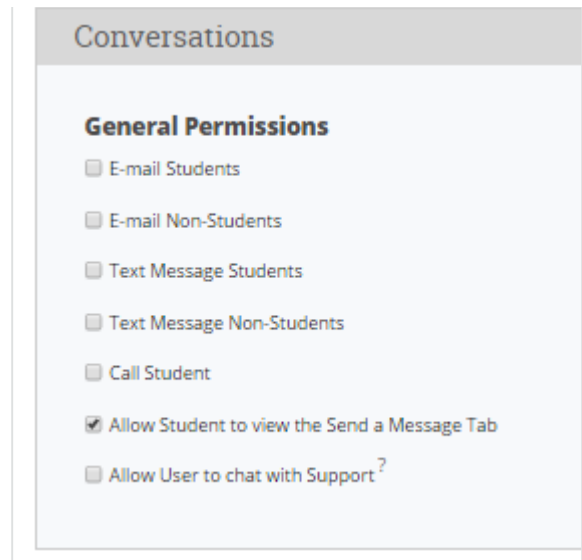
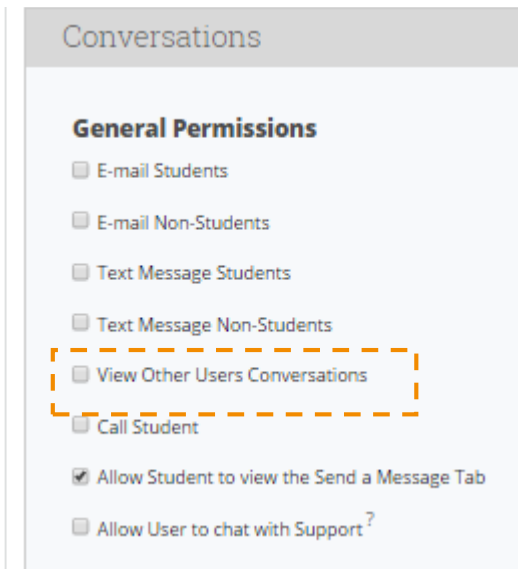
Availability Permissions

- Availability Create
- Availability Delete
- Availability Create for Others
- Availability Delete for Others

User Role Permission Restructuring

Edited: 'Conversations'

- Moved 'View Other Users Conversations' permission to the General section within Data Privacy & Access



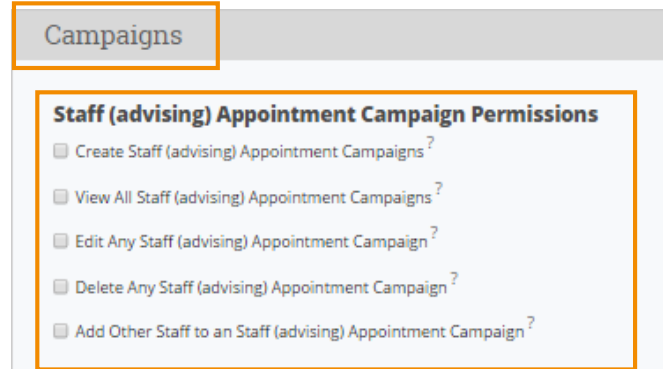
Edited: 'Campaigns & Travel Letters'

- Updated the language of the section title to simply 'Campaigns'
- Language in this section will update if edits are made to Appointment Configurations about the naming of Advising and Tutoring
- Moved the Travel Letter Administrator permission to the Athletic section

Before



After



User Role Permission Restructuring

Edited: 'Study Hall, Kiosk, & Appointment/Tutor Center'

- Condensed Kiosk Permissions
- Moved Study Hall Permissions to the Athletics section
- Moved Charity Time Permissions to the Athletics section

Before

Study Hall, Kiosk, & Appointment/Tutor Center

Appointment Center Permissions

Start Appointment Center[?]

Available Locations in Appointment Center Mode

- Academic Advising Center - Lecture H
- Academic Success Center
- Academic Success Center CL
- Academic Success Coaching

Tutor Center Permissions

Start Tutor Center Mode[?]

Available Locations in Tutor Center Mode

- Academic Advising Center - Lecture H
- Academic Success Center
- Academic Success Center CL
- Academic Success Coaching

Kiosk Permissions

View Appointment Queues

Start Kiosk Mode

Start Tutor Kiosk Mode

Student Services Reports

Remove Check-Ins from students

Study Hall Permissions

Check Students Out of Study Hall

Delete Logged Study Hall Time

View Study Hall Reports

Charity Time Permissions

Charity Time Create

Charity Time Delete

After

Appointment Center & Kiosk

Appointment Center Permissions

Start Appointment Center[?]

Available Locations in Appointment Center Mode

- Academic Advising Center - Lecture H
- Academic Success Center
- Academic Success Center CL
- Academic Success Coaching
- Athletics Complex

Tutor Center Permissions

Start Tutor Center Mode[?]

Available Locations in Tutor Center Mode

- Academic Advising Center - Lecture H
- Academic Success Center
- Academic Success Center CL
- Academic Success Coaching

Kiosk Permissions

View Appointment Queues

Start Kiosk Mode

Start Tutor Kiosk Mode

Remove Check-Ins from students

User Role Permission Restructuring

Edited: 'Student Info & Reporting'

- Focused this section primarily on the record taking abilities of users
- Moved a majority of the permissions associated with viewing student information to the Data Privacy & Access section
- Moved 'Custom Student Reports' permissions to the Athletics section

Before

Student Info & Reporting

Student Note Permissions

- Note Create
- Add Attachments to Notes
- Note Update
- Note View[?]
- Note Delete
- Note Reports

Access to Student Information Permissions

- Student Information Reports[?]
- Search All Students
- Advanced Search Filters
- Access to GPA filters in Advanced Search
- Access to Personal Information filters in Advanced Search
- View All Student Profiles
- View Student Profiles of Assigned Students
- View Student Profiles of Enrolled Students
- View Student ID on Student Profile Page
- View the Alternate ID on the Student Profile Screen
- View enhanced search results[?]
- Enable History Tab and Feed on the Student Profile[?]
- View Categories for Students
- View Custom Links on the Student Profile Screen[?]
- Access to the 30-seconds Overview on the Student Profile

After

Student Info & Reporting

Student Note Permissions

- Note Create
- Add Attachments to Notes
- Note Update
- Note Delete

Summary Report Permissions

- Summary Report Create
- Add Attachments to Summary Reports
- Update Own Summary Reports
- Delete Own Summary Reports
- Summary Report Update
- Summary Report View
- Summary Report Delete

Tag Permissions

- Tag Create
- Tag Delete
- Mass Assign Tags
- Edit Students Tags

User Role Permission Restructuring

Before

Custom Student Reports

- Mass Print - Custom Student Reports?
- Mass Print - Student Calendars?

Summary Report Permissions

- Summary Report Create
- Add Attachments to Summary Reports
- Update Own Summary Reports
- Delete Own Summary Reports
- Summary Report Update
- Summary Report View
- Summary Report Delete
- Summary Report Reports

Tag Permissions

- Tag Create
- Tag Delete
- Mass Assign Tags
- Edit Students Tags

After

Summary Report Permissions

- Summary Report Create
- Add Attachments to Summary Reports
- Update Own Summary Reports
- Delete Own Summary Reports
- Summary Report Update
- Summary Report View
- Summary Report Delete
- Summary Report Reports

Tag Permissions

- Tag Create
- Tag Delete
- Mass Assign Tags
- Edit Students Tags

Edited: 'Alerts & Cases'

- Removed 'View Student Cases on Student Profile Page' permission

Before

Alerts & Cases

- Issue Alerts?
- Case Assignment?
- Manage My Assigned Cases?
- View Student Cases on Student Profile Page?

After

Alerts & Cases

- Issue Alerts?
- Case Assignment?
- Manage My Assigned Cases?

User Role Permission Restructuring

Removed: 'Courses & Attendance'

- Moved 'Absence/Attendance Permissions' to 'Athletics'
- Moved 'Assignment Permissions' to 'Athletics'

Added: 'Athletics'

- Created a new grouping for permissions dealing with athletics, including assignment permissions, book slip administration, coach/tutor pay cycle permissions, coach/tutor pay levels permissions, study hall permissions, and charity time permissions

Note: The permissions in this grouping are not new permissions, but rather have been reassigned to this bucket from elsewhere in the user role permissions page

The screenshot displays the 'Athletics' permissions page, which is organized into several sections. Each section contains a list of permissions, each with a checkbox. The sections are:

- Athletics** (Section Header)
- General**
 - Absence View
 - Assignment View
- Assignment Permissions**
 - Assignment Create
 - Assignment Update
 - Assignment Delete
- Absence/Attendance Permissions**
 - Absence Recording
 - Absence Recording For All Students
 - Ad Hoc Attendances
Users can fill out Attendance for Meeting off the normal Class Schedule
- Book Slip Administration**
 - Book Slips Administration[?]
 - Ability to print book slips from student profile
- Enrollment Permissions**
 - Enrollment Drop
 - Enrollment Undrop
 - Enrollment Delete
- Coach/Tutor Pay Cycle Permissions**
 - Create new Pay Cycles
 - Edit Existing Pay Cycles
 - Remove Existing Pay Cycles
- Coach/Tutor Pay Levels Permissions**
 - Create new Pay Levels
 - Edit Existing Pay Levels
 - Remove Existing Pay Levels
- Study Hall Permissions**
 - Check Students Out of Study Hall
 - Delete Logged Study Hall Time
- Charity Time Permissions**
 - Charity Time Create
 - Charity Time Delete
- Custom Student Reports**
 - Mass Print - Custom Student Reports[?]
 - Mass Print - Student Calendars[?]
- Travel Letter Permissions**
 - Travel Letter Administrator[?]
- Miscellaneous**
 - Set a Preferred Max Hours for Appointments

User Role Permission Restructuring

Edited: 'Administration'

- Moved a number of 'General Administration' permissions to more appropriate sections.
- Reduced 'Exchange Sync Permissions' and added additional clarifying language.

Before

Administration

General Administration

- Category Administration
- Course/Section Administration
- Section Tag Administration[?]
- Data Imports
- API Access
- Location Administration
- Important Information Administration
- Grades Administration
- Student Services Administration
- View Help Center[?]
- Role Administration
- School Settings Update
- Student Mass Edit
- Tag Administration
- Term Administration
- Text Message Administration[?]
- Advisor Reports
- View Advisor Availability Report
- User Impersonation[?]
- Alert Reason Administration[?]
- Case Management Administration[?]
- View Reports on Alerts for All Students
- View Reports on Cases for All Students
- Professor Information Reports
- Manage Teams
- Watch list

After

Administration

General Administration

- Category Administration
- Course/Section Administration
- Section Tag Administration[?]
- Location Administration
- Important Information Administration
- Grades Administration
- Student Services Administration
- Role Administration
- School Settings Update
- Student Mass Edit
- Tag Administration
- Term Administration
- Text Message Administration[?]
- Staff Reports
- View Staff Availability Report
- User Impersonation[?]
- Alert Reason Administration[?]
- Case Management Administration[?]
- Manage Teams

User Role Permission Restructuring

Before

Workflow Permissions

- Workflow Administrator
- E-mail Template Administrator

School Employment Level Permissions

- Create new Employment Levels
- Edit Existing Employment Levels
- Remove Existing Employment Levels

User Administration Permissions

- User Create
- User Update
- User Delete
- Allow User to Search
- Search For All Users
- Allow Quick Search

Group Permissions

- Group Update
- Assign Users To Groups

Exchange Sync Permissions

Note, these permissions will not stop syncing of calendars that are already setup.

- Exchange Sync Feature[?]
- Edit Exchange Mailbox[?]
- Allow Exchange Calendar Sync[?]

After

Workflow Permissions

- Workflow Administrator
- E-mail Template Administrator

School Employment Level Permissions

- Create new Employment Levels
- Edit Existing Employment Levels
- Remove Existing Employment Levels

User Administration Permissions

- User Create
- User Update
- User Delete
- Allow User to Search
- Search For All Users
- Allow Quick Search

Group Permissions

- Group Update
- Assign Users To Groups

Exchange Sync Permissions

Note, these permissions will not stop syncing of calendars that are already setup. Exchange calendar syncing is started and stopped in each person's calendar settings.

- Exchange Sync Feature[?]
- Edit Exchange Mailbox[?]

Relocated: 'Institution Reports and GradesFirst Analytics'

- Note:** The permissions previously listed in this grouping have been reassigned to the Data Privacy & Access bucket. They have not been removed from the site altogether.

Removed: 'Early Access Features'

- Note:** The permissions previously listed in this grouping have been removed from this page as they are automatically enabled features at the site level not user role level.



Appointment Configurations

- How to Configure
- Impact on Display
- Impact on Student Scheduling Workflow

New Feature: Appointment Configurations

As part of this release, we've allowed for increased flexibility when it comes to naming the appointment types in SSC GradesFirst.

Before: Appointment Types are strictly Advising and Tutoring

After: Able to change the display of these Types to institution-specific language

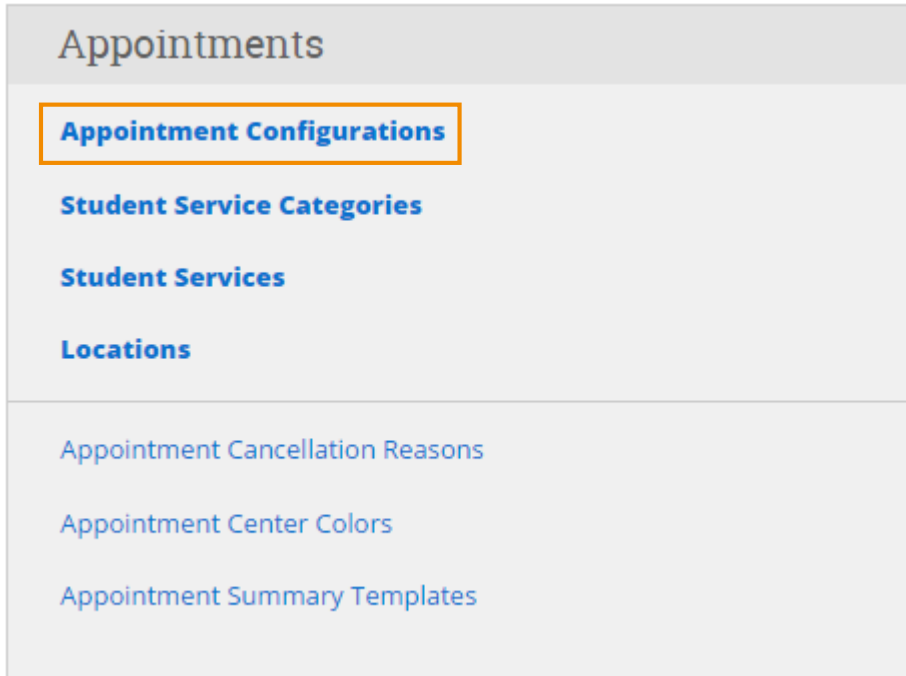
You will find this site configuration on the Administration page in the Appointments section. Within the configuration you have the option to rename how this appointment type displays and the title of anyone associated with this appointment type.

Impact:

- The display of an appointment type appears on a user's Home Page when looking at recent and upcoming appointments as well as appointment queues and requests.
- The Reporting page will update to better classify the appointment type associated with the reports and the title of users involved with these reports.
- The name of the Summary Report will update based on the display name chosen.

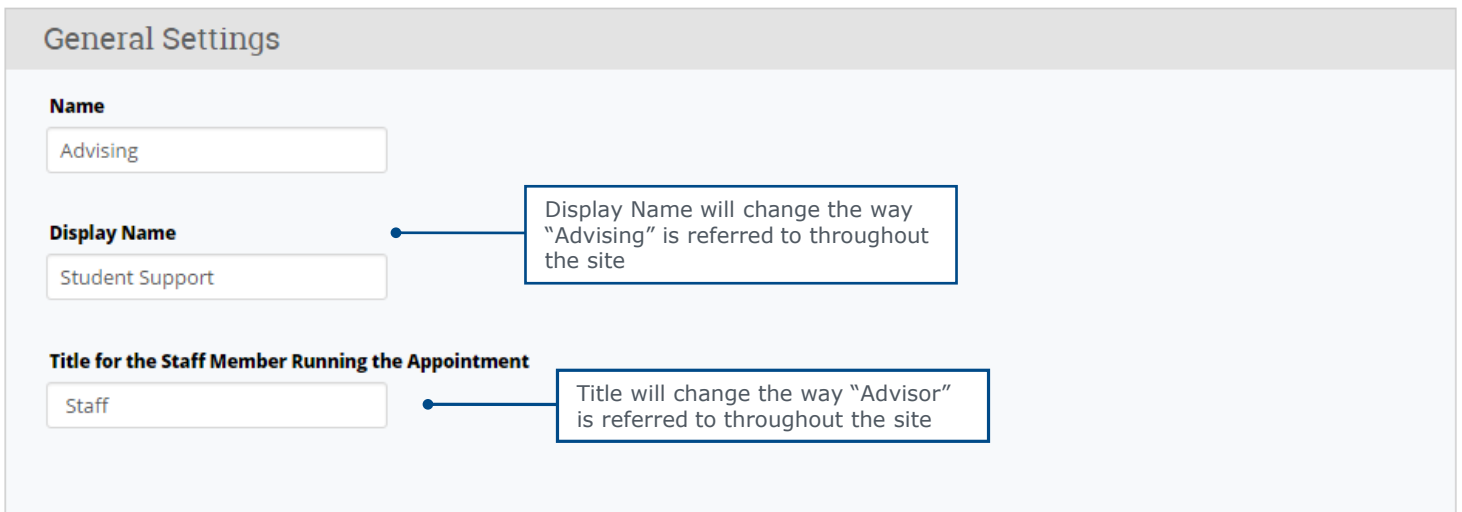
Appointment Configurations

Where to Access on Administration Page:



How to Edit Appointment Types:

Appointment Configurations > Edit Advising



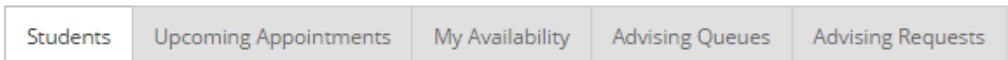
Display of Appointment Configurations

Site Impacts:

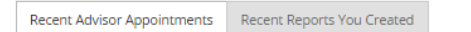
Home Screen Title & Tabs

Before

Advisor Home ▾



Advisor Reporting

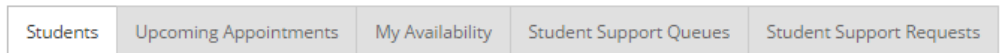


Recent Advising Appointments

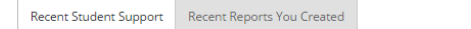


After

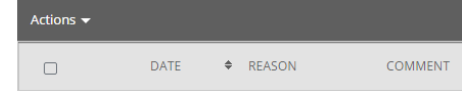
Staff Home ▾



Staff Reporting



Recent Student Support

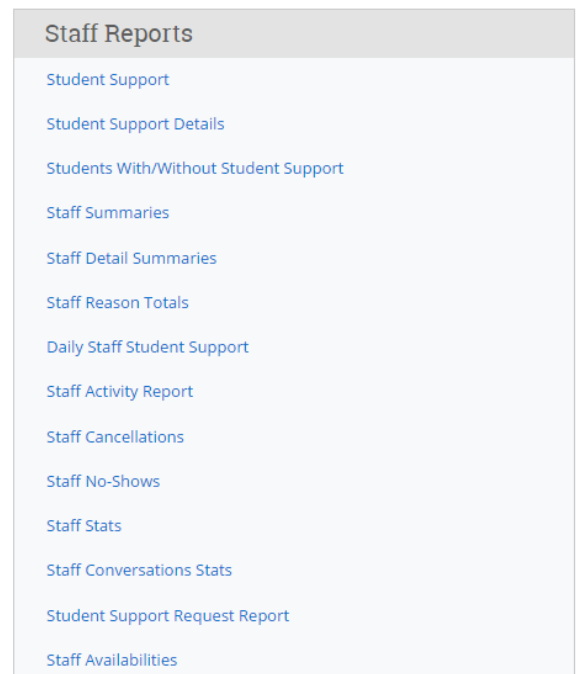


Report Titles

Before



After



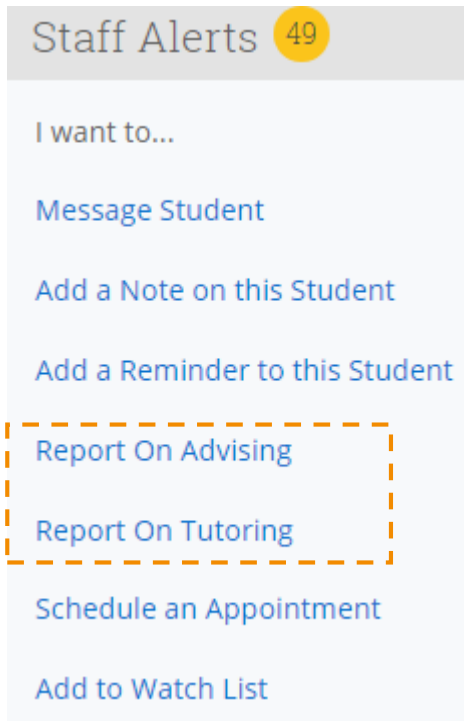
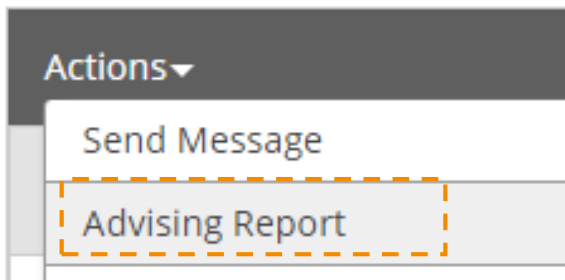
Display of Appointment Configurations

Site Impacts:

Summary Reports

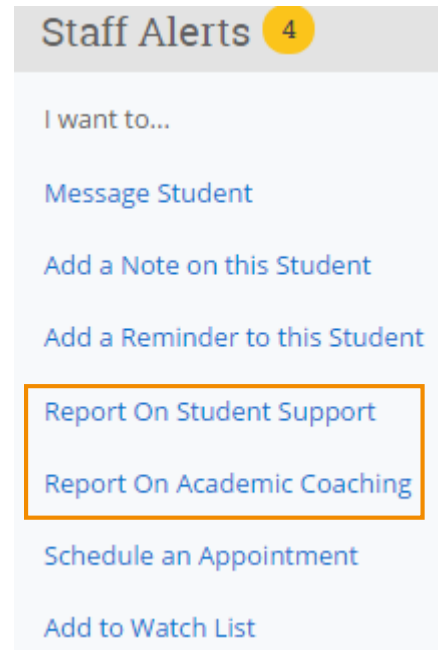
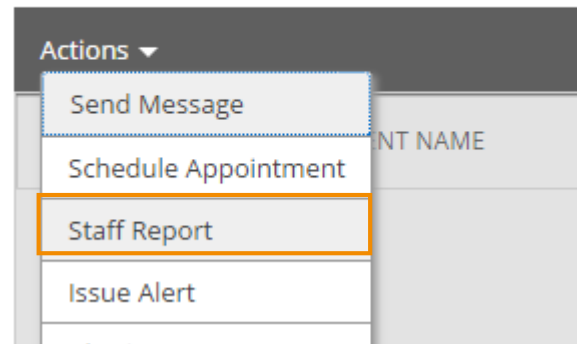
Before

My Assigned Students



After

My Assigned Students



Appointment Configurations & Student Scheduling

As part of this release, we've allowed for increased flexibility when it comes to the language within the student scheduling workflow.

Before: The text that students see during the scheduling process was not customizable

After: Able to customize the language that students see as they move through the scheduling workflow and also able to have different text for different appointment types

You will find this site configuration on the Administration page in the Appointments section under Appointment Configurations. Within the configuration you have the option to customize the button text, service category selection, service selection, location selection, staff selection, and drop-in/request.

Student Scheduler Configuration

Get Assistance Button Text:

Step 1: Service Category Selection

Step 1: Student Service Selection

Step 2: Location Selection

Step 2: Staff Selection

Step 3: Drop In/Request

Appointment Configurations & Student Scheduling

Impact of Configurations on Student Scheduling Workflow

Step 1: Service Category Selection:

To help you find a time, please tell us why you'd like to see someone.

-- please select one --

Step 1: Service Selection

To help you find a time, please tell us why you'd like to see someone.

Career Services

Choose from the following services that we have available

-- please select one --

- please select one --
- Interview Coaching
- Resume Development

Step 2: Location Selection

Select where you want to meet

-- please select one --

Career Services

Step 2: Staff Selection

Select where you want to meet

Career Services

Select your staff person

If you don't have a preference, just click Next.

Any Staff

Additional Context:

Step 1

Service Category Selection:

Text that displays when selecting service categories.

Student Service Selection:

Text that displays when selecting the reason for the appointment.

Step 2

Location Selection:

Text that displays when selecting location for appointment.

Staff Selection:

Text that displays when selecting the individual with whom the student wishes to meet.

Appointment Configurations & Student Scheduling

Impact of Configurations on Student Scheduling Workflow

Step 3: Drop-In/Request Selection

Step 3

Drop In / Request

Text that displays in order to prompt the student to find walk in times or drop in times. In order for this section to appear either users need to create Drop In availability or request appointment at this location needs to be enabled.

< Times From April 11 To April 16 >

Tue, Apr 11	Wed, Apr 12	Thu, Apr 13	Fri, Apr 14	Sat, Apr 15
Morning 4 Available	Morning 17 Available	Morning 20 Available	Morning 20 Available	Morning N/A
Afternoon 17 Available	Afternoon 17 Available	Afternoon 18 Available	Afternoon 16 Available	Afternoon N/A

Please look at what times others might be available! [View Walk-in Times](#) or [Request Staff \(advising\) Appointment](#)

Additional New Feature

The Student Scheduling Screen now adjusts to show the current day and four days ahead. At the Location level you can now enable Weekend appointment scheduling to be included in this scheduling grid. There is a separate page in this guide on how to enable this feature.

Appointment Configurations & Student Scheduling

Impact of Configurations on Student Scheduling Workflow

Schedule **Staff (advising) Appointment** ← Display Name Text

To help you find a time, please tell us why you'd like to see someone. ← Service Category Selection

General Advising

Choose from the following services that we have available ← Student Service Selection

Change Major/Minor

Schedule Staff (advising) Appointment

Select where you want to meet ← Location Selection

Academic Success Center

Select your staff person ← Staff Selection

If you don't have a preference, just click Next.

x Kilpatrick, Steven

Schedule Staff (advising) Appointment

← Times From April 12 To April 17 →

Wed, Apr 12	Thu, Apr 13	Fri, Apr 14	Sat, Apr 15	Sun, Apr 16
Morning N/A	Morning 23 Available	Morning 21 Available	Morning N/A	Morning N/A
Afternoon 19 Available	Afternoon 20 Available	Afternoon 21 Available	Afternoon N/A	Afternoon 2 Available

Please look at what times others might be available! ← Drop In / Request

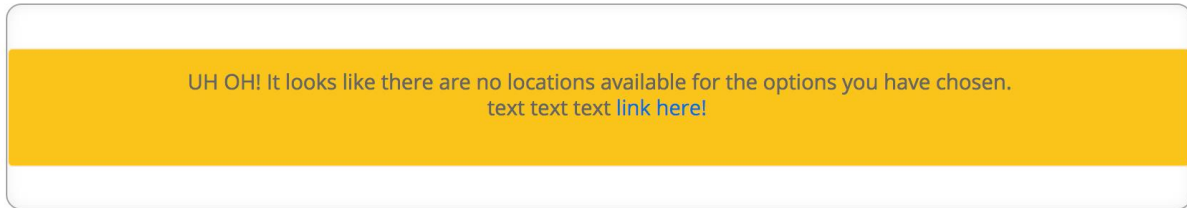
View Walk-in Times or Request Staff (advising) Appointment

← Back Next →

Student Scheduling Dead End Page Customization

These new configurations allow admins to determine the language that is shown when a student runs into a dead end. In the student scheduling workflow, a dead end is when there are no available options or locations for what the student has chosen.

Schedule Advising



◀ Back

Next

These settings live on the **Appointment Configuration** page on the admin screen below the question configuration area.

Custom Error Message

Uh oh, looks like no options are available!

call us at 555-555-5555

www.eab.com

body p

Locations Custom Error Message

UH OH! It looks like there are no locations available for the options you have chosen.

text text text [link here!](#)

|

body p

This error message will display only if the student is not associated with any service category in the platform

This error message will display only if the student chooses a service that has no locations or staff available for that choice



Scheduling

- Associating Appointments with Campaigns
- Weekend Scheduling
- Enhanced Walk-In Screen for Students

New Feature: Ability to Associate Appointments with Campaigns

As part of this release, we've created the ability to associate appointments scheduled *outside* of a campaign with the campaign itself. Previously, it was not possible to track a scheduled appointment as part of the appointment campaign if the student did not use the scheduling workflow provided in the campaign email. With this enhancement, you are now able to more accurately track campaign effectiveness by ensuring that all appointments (scheduled inside or outside of the campaign workflow) contribute to the campaign's performance metrics.

This association can be documented via:

1. An action item in the appointment campaign summary page
2. A selection within an appointment report

In this section, we have detailed the changes you can expect to see accompanied by screenshots of the updated functionality.

Ability to Associate Appointments with Campaigns

Added: 'Eligible Appointments' tab

- Within the campaign reports, there is a new 'Eligible Appointments' tab
- Within that tab, you will see *all appointments* that have been scheduled by students that are included in that campaign, regardless of whether or not they were created within the parameters of the campaign
- Only appointments with the location and service used in the campaign will populate.
- From there, a staff user can select an appointment and select 'Associate to Campaign' from the 'Actions'
- After associating the appointment with the campaign, the appointment will move from the 'Eligible Appointments' tab to the 'Appointments Made' tab

Before:

Appointment Campaigns > Biology Advising Campaign
 04/11/2017 - 04/25/2017
 Appointments Made | Appointments Not Yet Made | Reports Created

After:

Appointment Campaigns > Biology Advising Campaign
 [Expired] 04/11/2017 - 04/25/2017
 Appointments Made | Appointments Not Yet Made | Reports Created | **Eligible Appointments**

Appointments Made | Appointments Not Yet Made | Reports Created | **Eligible Appointments**

This grid will display all eligible appointments that have been scheduled outside of the campaign link. Eligible appointments include only those that have been scheduled with the location and service that the campaign is created for.

Actions					
	DATE	STUDENT	ORGANIZER	REASONS / COURSE	
<input checked="" type="checkbox"/>	1	04/13/2017 02:30 PM	Mahon Ballar	Kilpatrick, Steven	Changes to my Schedule

Appointments Made | Appointments Not Yet Made | Reports Created | Eligible Appointments

Actions			
<input type="checkbox"/>	APPT DATE	APPT TIME	STUDENT
<input type="checkbox"/>	1	04/12/2017	2:00p-2:30p Brockus, Eddie
<input type="checkbox"/>	2	04/13/2017	2:30p-3:00p Ballar, Mahon

Ability to Associate Appointments with Campaigns

Added: 'Appointment Campaign' dropdown in Advising Reports

- When a student has been included in an appointment campaign and a staff user is creating a summary report for a previously scheduled or upcoming appointment, the staff user will see a drop down titled 'Appointment Campaign'
- From there, the staff user will have the ability to associate that appointment with the campaign.
- The appointment will then be added to the 'Appointments Made' tab within the Appointment Campaigns summary page

Upcoming Staff (Advising) Appointment

ATTENDEE	REASON
Brockus, Eddie	General Advising

The dropdown menu will display all possible appointment campaigns in which both the staff user and the student are involved

ADVISING REPORT FOR EDDIE BROCKUS

Appointment Details

Appointment: 04/12/2017 2:00p-2:30p - General Advising

Appointment Campaign: **Biology Advising Campaign**

Meeting type: Select Meeting Type

Report Details For Ed

Majors Discussed

Student degree plan added

Student major discussed

Appointment Summa

Appointments Made | Appointments Not Yet Made | Reports Created | Eligible Appointments

APPT DATE	APPT TIME	STUDENT
1 04/12/2017	2:00p-2:30p	Brockus, Eddie
2 04/13/2017	2:30p-3:00p	Ballar, Mahon

Location Settings for Student Scheduling Workflow

These new settings will allow you to display different options based on location in the Student Scheduling Workflow. These options are available for both Advising and Tutoring.

Advising Information for this Location

If Advising will be held at this location, please fill out the fields below.

Appointment increment: ?

Allow Students to Schedule Advising

Allow Students to View Advising Dropin Availabilities

Allow Students to Request Advising ?

Show Location All the Time

Show Location Only if there is Appointment Availability

Staff/Advisor Coordinator E-mail Address: ?

1. Allow Student to Schedule Advising (or Tutoring)

- This option enables a student to see and schedule appointments at this location

2. Allow Student to view (Advising/Tutoring) Drop-in Availabilities

- This option enables the student to view drop-in times on the scheduling grid – this is a new option to show or hide the drop in times based on your location

3. Allow Student to Request (Advising/Tutoring)

- This setting grants the ability for a student to request appointments

3a. Show Location All the Time

- This setting allows the location to display in the student scheduling workflow all the time, even if there are no users with availabilities set up at this particular location.

3b. Show Location Only if there is Appointment Availability

- This setting restricts the display of the location so it only appears if there is at least one user with appointment availability at that particular location

Scenario: The "XX Tutor Center" location supports tutoring appointment requests for all courses, despite the fact that for some courses there are no tutors with availability set up to offer tutoring in the course. In this scenario, the "Show location all the time" setting would be used for this location so that students would see this location option regardless of the course they choose. But the option to request tutoring would only be available for the courses with no tutors available. If a tutor does have availability to tutor for a particular course then the student would need to make an appointment for a time that worked, they could not opt to request another date and time



Appointment Center

- Selecting Appointment Center Locations
- Updates and Actions from Student Card in Appointment Center
- Actions from Appointment Card in Appointment Center
- Hover-Over Actions in Appointment Center
- "Drop-In Appointments" screen in Appointment Center
- "Scheduled Appointment" screen in Appointment Center

Updated Feature: Appointment Center User Interface

We have redesigned the user interface and interactions in Appointment Center as part of this release. There are new actions and abilities to manage locations for advising *and* tutoring appointments.

If you turn on the new Appointment Center in your site, your users can use either the current or new Appointment Center interface.



Appointment Center
New Appointment Center
Tutor Center
Advising Kiosk
Tutor Kiosk

Additional Modes ▾

New features include:

- New design for appointments and availabilities grid
- Ability to change the x and y axis of grid
- New “Create [an Advising/a Tutoring] Appointment” dialog box
- Hover-over details when looking at appointment blocks
- Fewer clicks to override conflicts and move appointments
- New actions when checking students in for appointments
- Additional details on students when checking in
- New “Drop-In Appointments” screen with actions for appointments
- New “Scheduled Appointment List” screen with actions for appointments

Appointment Center User Interface

Setting Up Location for Appointment Center

Before:

Follow the steps provided to set up Appointment Center at this location.

Choose the Location for this Appointment Center

	Academic Advising Center - Lecture Hall
	Academic Success Center
	Academic Success Center CL
	Academic Success Coaching
	adv test
	AStudy Hall
	Athletics Complex
	Business Advising Center
	Campus Recreation Center
	Career Services

After:

Choose Appointment Center Location

Appointment Center Name

Academic Advising Center - Lecture Hall	Academic Success Center
Academic Success Center CL	Academic Success Coaching
Athletics Complex	Business Advising Center
Campus Recreation Center	Career Services
College of Sciences Advising	Financial Aid Office
IUB - ASC Facilities	IUB - University Division
Library	Library Tutoring Center, 3rd Floor
Student Athlete Support Center	Test 1
Test 2	Tutor Drop In

Appointment Center User Interface

Before:

Campus Student Success Collaborative®

Whitehurst Uni... Spring Semester 2..

Availability For Apr 06 2017

TIME	SUPPORT 435	BRYON ADAMS	MICHAEL ADAMS	DARIA ALEKSANDROVA	SARAH BARTLETT	STEPHEN BROWN	ZAC BUDROW	ASHLEE DEMASTUS	TYLER DILLMAN	CHRISTINE DUCHOUQUETTE	SHANNON ESSELINK	BEN GALINA	MAANIE HAMZAE
7:00a													DROP-IN
8:00a	DROP-IN	DROP-IN								DROP-IN			DROP-IN
9:00a	DROP-IN	COURSE						COURSE		DROP-IN			DROP-IN
10:00a	DROP-IN	DROP-IN											DROP-IN
11:00a	DROP-IN	DROP-IN											DROP-IN
12:00p	DROP-IN	DROP-IN		APPOINTMENT									DROP-IN
1:00p	DROP-IN	DROP-IN											DROP-IN
2:00p	DROP-IN	DROP-IN								GENERAL			DROP-IN
3:00p	DROP-IN	DROP-IN											DROP-IN
4:00p	DROP-IN	DROP-IN											DROP-IN

After:

Scheduling Grid

Advising All Services All Staff

07/19/2017 8:00AM 5:00PM Refreshed Today 05:27 PM


+ Find First Available

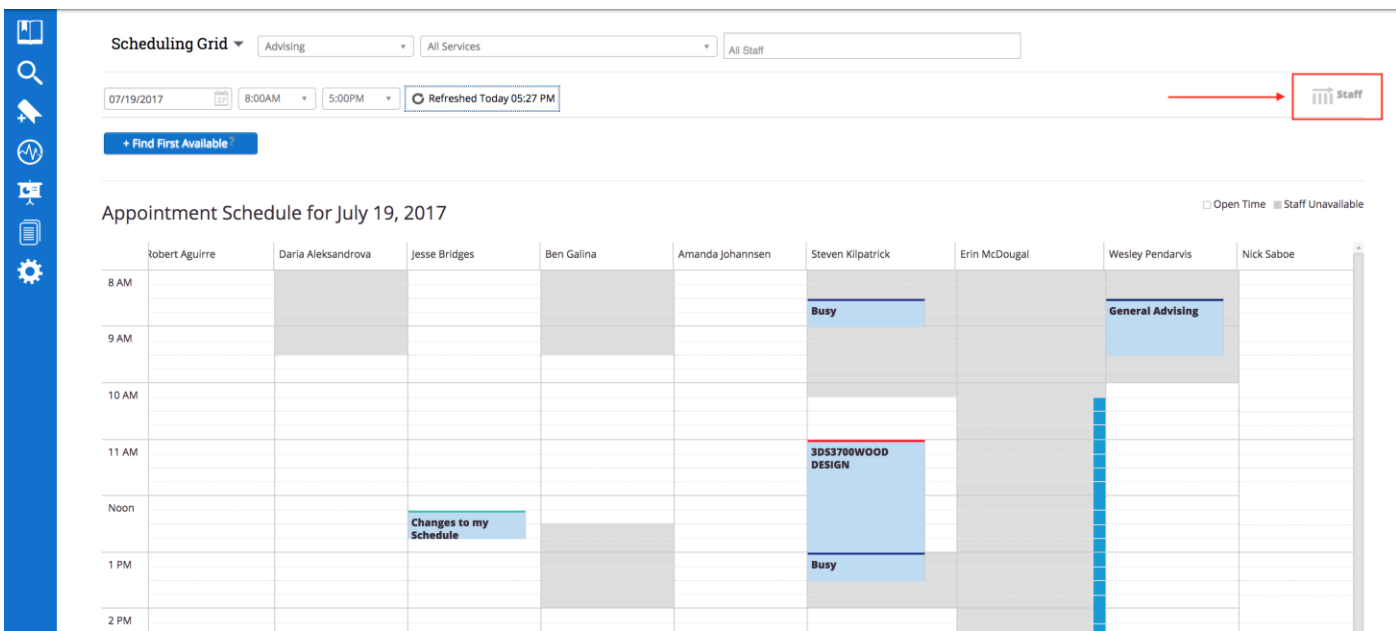
Appointment Schedule for July 19, 2017

	Robert Aguirre	Daria Aleksandrova	Jesse Bridges	Ben Galina	Amanda Johannsen	Steven Kilpatrick	Erin McDougal	Wesley Pendarvis	Nick Saboe
8 AM						Busy		General Advising	
9 AM									
10 AM									
11 AM						3DS3700WOOD DESIGN			
Noon			Changes to my Schedule						
1 PM						Busy			
2 PM									
3 PM						Busy			

Time Grid for Appointments and Availabilities

The first thing you will notice is that there are no more green check boxes for open times. We have moved toward a more common calendar interface where available time for appointments are shown as white blocks and unavailable times as grey blocks.

If you click the "  Staff " icon on the top right, you will be able to change the orientation of the staff and times if you would prefer one to be the column header over the other.



Scheduling Grid | Advising | All Services | All Staff

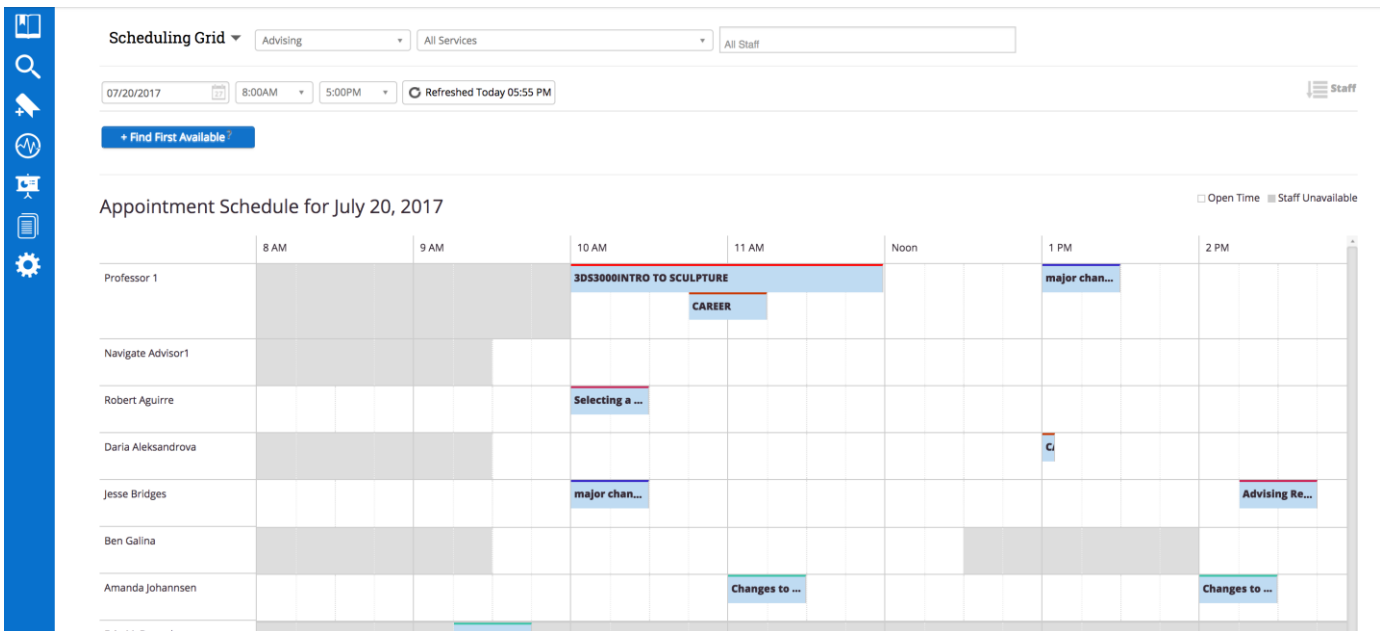
07/19/2017 | 8:00AM | 5:00PM | Refreshed Today 05:27 PM

+ Find First Available?

Appointment Schedule for July 19, 2017

	Robert Aguirre	Daria Aleksandrova	Jesse Bridges	Ben Galina	Amanda Johannsen	Steven Kilpatrick	Erin McDougal	Wesley Pendarvis	Nick Saboe
8 AM						Busy		General Advising	
9 AM									
10 AM									
11 AM						3DS3700WOOD DESIGN			
Noon			Changes to my Schedule						
1 PM						Busy			
2 PM									

When "staff" icon is clicked:



Scheduling Grid | Advising | All Services | All Staff

07/20/2017 | 8:00AM | 5:00PM | Refreshed Today 05:55 PM

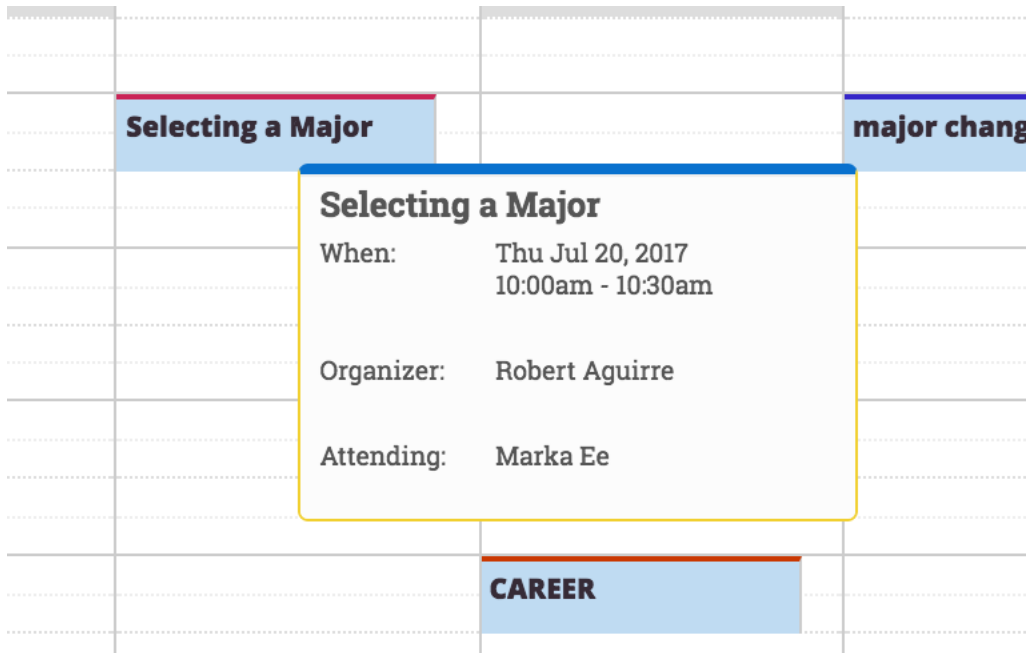
+ Find First Available?

Appointment Schedule for July 20, 2017

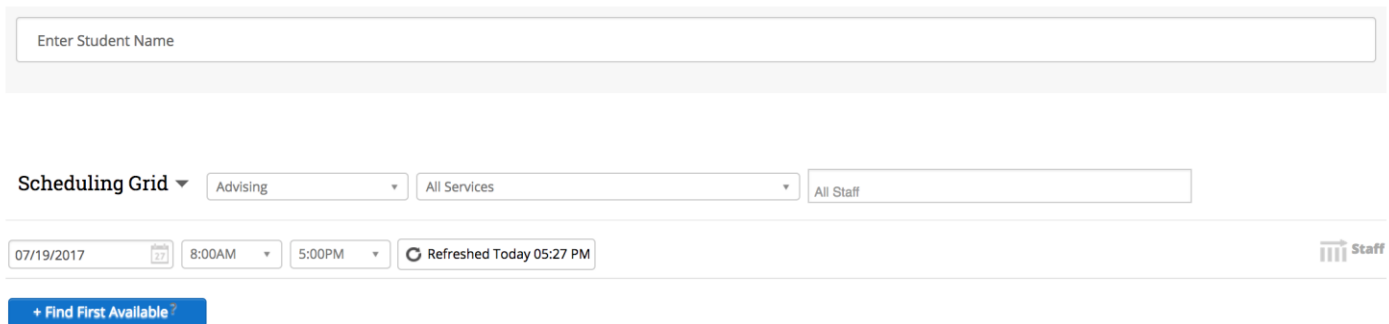
	8 AM	9 AM	10 AM	11 AM	Noon	1 PM	2 PM
Professor 1			3DS3000INTRO TO SCULPTURE	CAREER		major chan...	
Navigate Advisor1							
Robert Aguirre			Selecting a ...				
Daria Aleksandrova						Ci	
Jesse Bridges			major chan...				Advising Re...
Ben Galina							
Amanda Johannsen				Changes to ...			Changes to ...
Erin McDougal							

Scheduling Grid Interactions

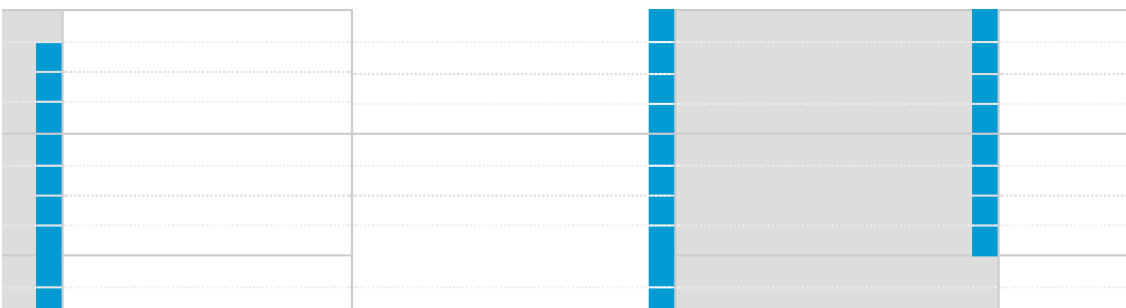
If you hover over appointments, you will notice a pop-up that will display some details about the block you are hovering over.



Across the top of the scheduling grid, where the date picker, time range, and reload options are placed have changed.



Blue blocks will display the drop-in availability on the scheduling grid.



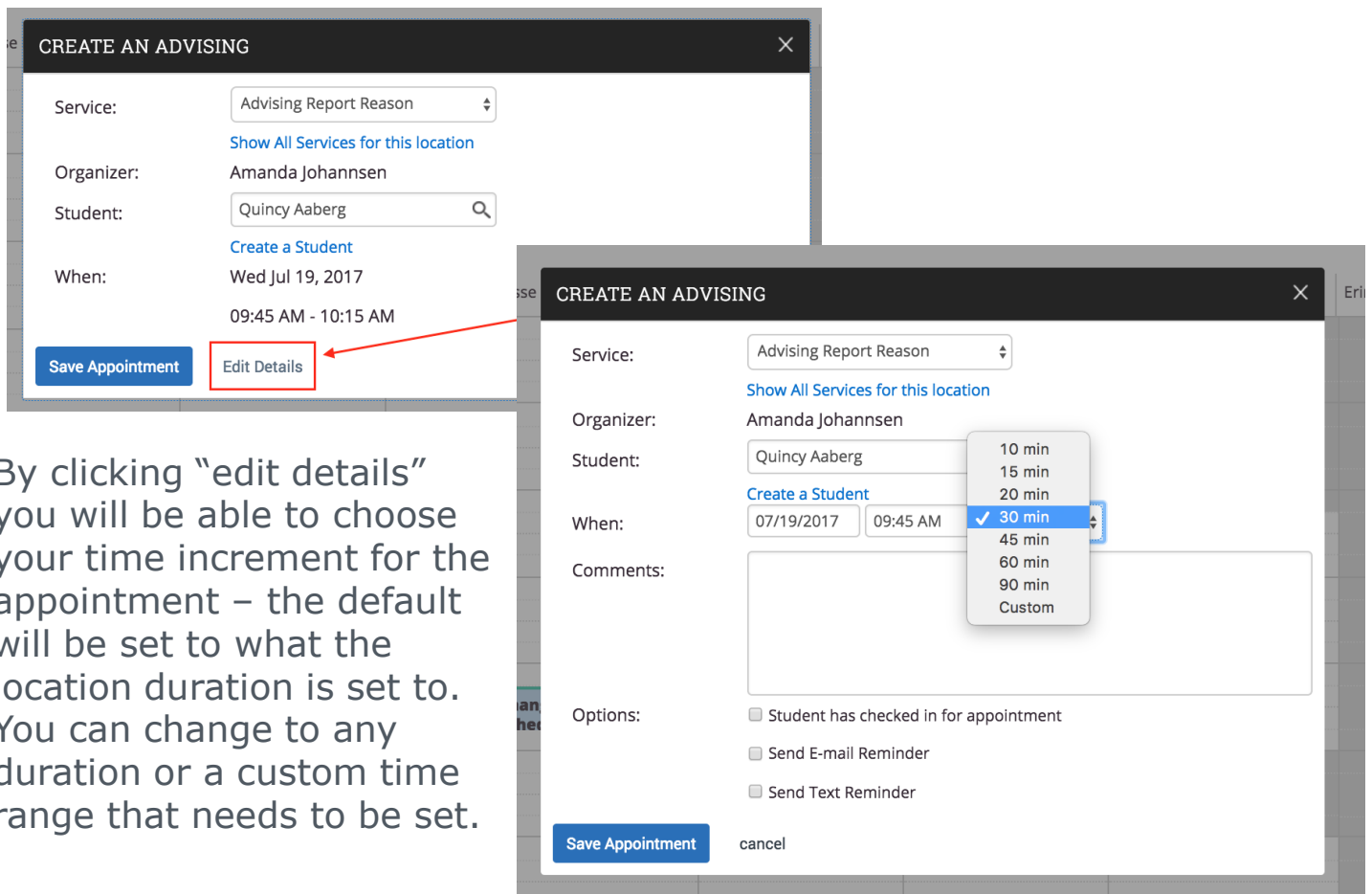
Time Grid for Appointments and Availabilities

To schedule an appointment with a specific student, click into one of the time blocks, and you will see the “Create an Appointment” dialog box. If you have not already entered a student’s name at the top of the Appointment Center screen, then you will see the option within the appointment dialog to find a student.

Once you begin scheduling, you will see the option to choose a service. The choices will default to the available services for the staff member chosen. To see other services in a given location, select the “Show all Services for this location” option.

If the staff member chosen is not available, the user will see a yellow banner stating that the staff member is not available. Note that the user *does* have the ability to continue scheduling, as they can today.

Within this window, you have the ability to edit the details of the appointment and change the length if needed.



The image displays two screenshots of the "CREATE AN ADVISING" dialog box. The left screenshot shows the "Edit Details" button highlighted with a red box and a red arrow pointing to it. The right screenshot shows the "When" field with a dropdown menu open, displaying time increments: 10 min, 15 min, 20 min, 30 min (selected), 45 min, 60 min, 90 min, and Custom.

By clicking “edit details” you will be able to choose your time increment for the appointment – the default will be set to what the location duration is set to. You can change to any duration or a custom time range that needs to be set.

Actions and Information on Student Card

When checking in a student for an appointment or a drop-in, users will be able to see additional information and take additional actions from the student card of the selected student.

Additional information:

- Student ID
- Email Address
- Major
- Classification
- Assigned Staff

Additional actions:

- Send Message to Student
- Send Message to Organizer (Advisor or Tutor)

Academic Success Center

The screenshot displays the Academic Success Center interface. At the top, a search bar contains the name 'Mulany Blomker'. Below the search bar, there are two main panels. The left panel is the student card for Mulany Blomker, which includes a profile picture, her name, email address (dngmx1720@vggtee.tnb.jzy), a link to 'Schedule General Event', her classification as 'Freshman', and information about staff and coaches. A 'Send Message' link is at the bottom. The right panel is an event card for 'Change Major/Minor' on Thursday, April 6, 2017, from 07:00a to 08:00a. The organizer is Jennifer Alger (Admin: Dude), and the attending student is Mulany Blomker. The event is marked as 'about 10 hours late'. A 'Check-In' button is present. An 'Actions' dropdown menu is open, showing options: 'Edit', 'Move', 'Cancel', and 'Message Organizer' (which is highlighted with a red box).

Scheduled Appointment List Screen

In many cases, a front desk staff worker may need to view today’s appointments. With the “Scheduled Appointment List” tab, users can view all of the appointments for the current day and take action from the list.

Actions include:

- Send message to Attendee (Student)
- Send message to organizer(s)
- View Appointment Details
- Check In
- Check Out
- Mark No-Show
- Cancel Appointments

When choosing multiple appointments, actions are limited to sending messages and canceling appointments. This gives users the ability to cancel all appointments for a given day in a particular location.

Users also have the ability to select any date and see appointments on the selected day.

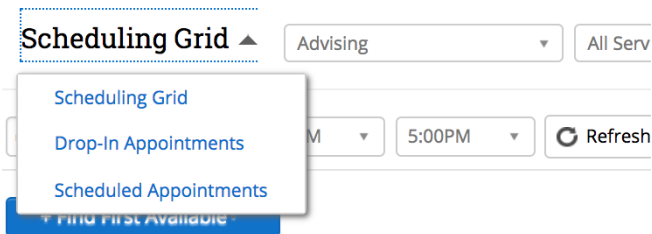
Scheduled Appointments ▼
 ▼
 ▼

Scheduled Appointments For 07/20/2017

Actions ▲				
	REASON	ATTENDEE	ORGANIZER	CHECKED IN
<input type="checkbox"/>	Changes to my Schedule	Wenda Adessa	Erin McDougal	No
<input type="checkbox"/>	Selecting a Major	Marka Ee	Robert Aguirre	No
<input type="checkbox"/>	Change Major/Minor	Wendy Acton	Jesse Bridges	No
<input type="checkbox"/>	Changes to my Schedule	Benito Aaby	Amanda Johannsen	No
<input type="checkbox"/>	Career Counseling	Druce Abate	Daria Aleksandrova	No
<input type="checkbox"/>	Change Major/Minor	Quincy Aaberg	Professor 1	No

Drop-In Appointments Screen

In many cases, a front desk staff worker may need to view today's appointments. With the "Drop-In Appointments" screen, users can view all of the drop-ins for the current day and take action from the list. You can find this screen by clicking the dropdown to the left of the filters at the top part of the screen.



Actions include:

- Send message to Attendee (Student)
- Move to Top (of queue)
- Remove (from queue)

Users are still able to add students to a queue from the left hand side. They can add students to either the First Available Queue or a specific staff member's queue.

Reload
Last Reloaded at 5:49PM

View Queue For:

Filter

First Available +Queue
Advisor
101 hr 6 min
1

Other Advisors

Cary Adkinson +Queue
Advisor
Current wait:none
0 waiting

Other Tutors

Ben Galina Checkin
Advisor
Current wait:none
0 waiting

Cary Adkinson
Advisor
none
0

+ Check in without specific Staff?

Students In First Available's Queue

Actions	STUDENT NAME	SERVICE	COMMENT	CHECKED IN
Send a Message Move to Top Remove	Ilie Bosefski	General Advising		12:42p (101 hr 6 min)

Students In Cary Adkinson's Queue

SELECT	STUDENT NAME	SERVICE	COMMENT	CHECKED IN
There are no students waiting on this advisor				

Students Checked In Without Specific Staff

SELECT	NAME	REASON	COURSE	CHECKED IN AT
<input type="radio"/>	Aaberg, Quincy	Career Counseling		7:15p
<input type="radio"/>	Abes, Yo	Career Counseling		4:22p
<input type="radio"/>	Brinck, Charlie	Change Major/Minor		5:09p

Check-in Without Specific Staff button

On the drop-in appointment screen, there is a button that says “Check Student in Without Specific Staff”. This button allows front desk workers to check in students to track the duration of a visit if there are no staff users to check the student in with. This document will walk you through the use cases for this button in the Appointment Center as well as the staff queue changes that relate to this button.

“Check in without specific staff” button:

After searching for and selecting a student in the Appointment Center, you will see the “Check in without specific staff” button (*previously named the “Record Visit” button*) appear. In the tooltip, you will see a message that selecting this button is recommended only when/if there are no staff available for drop-ins or for when you do not need to check a student in with a staff member. This means that the student’s visit will not be tied to any staff member when accessing appointment reports.

Using this button will record the student’s visit and track the check-in and check-out time.

Once the student is checked in with the “Check in without specific staff” button, users can see that student in their Staff Queue tab on their profile.

⏏ U

+ Check in without specific Staff?

The Check in without specific Staff button is used to check students in and track the duration of the visit if there are no staff available or you are not checking the student in with a staff member. We only recommend using this option if you are not checking students in with staff.

Students Checked In Without Specific Staff

Actions	
NAME	REASON
Aaberg, Quincy	Career Counseling
Abes, Yo	Career Counseling
Brinck, Charlie	Change Major/Minor