

Updated Feature: Appointment Center User Interface

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



Features include:

- Updated Design for appointments and availabilities grid
- Ability to change the staff and time axis within scheduling grid
- “Create [an Advising/a Tutoring] Appointment” dialog box
- Hover-over details when looking at appointment blocks
- Fewer clicks to override conflicts and move appointments
- Improved actions when checking students in for appointments
- Ability to view Student Cards containing email and classification
- “Drop-In Appointments” screen with actions for appointments
- “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

Find First Available? Thursday - 4/6/17 7:00a to 5:00p? Reload

First Available Current wait: none

Choose Advisor(s)

- Michael Adams
- Daria Aleksandrova
- Sarah Bartlett
- Stephen Brown
- Zac Budrow
- Ashlee Demastus

After:

Scheduling Grid Advising All Services All Staff

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


+ Find First Available

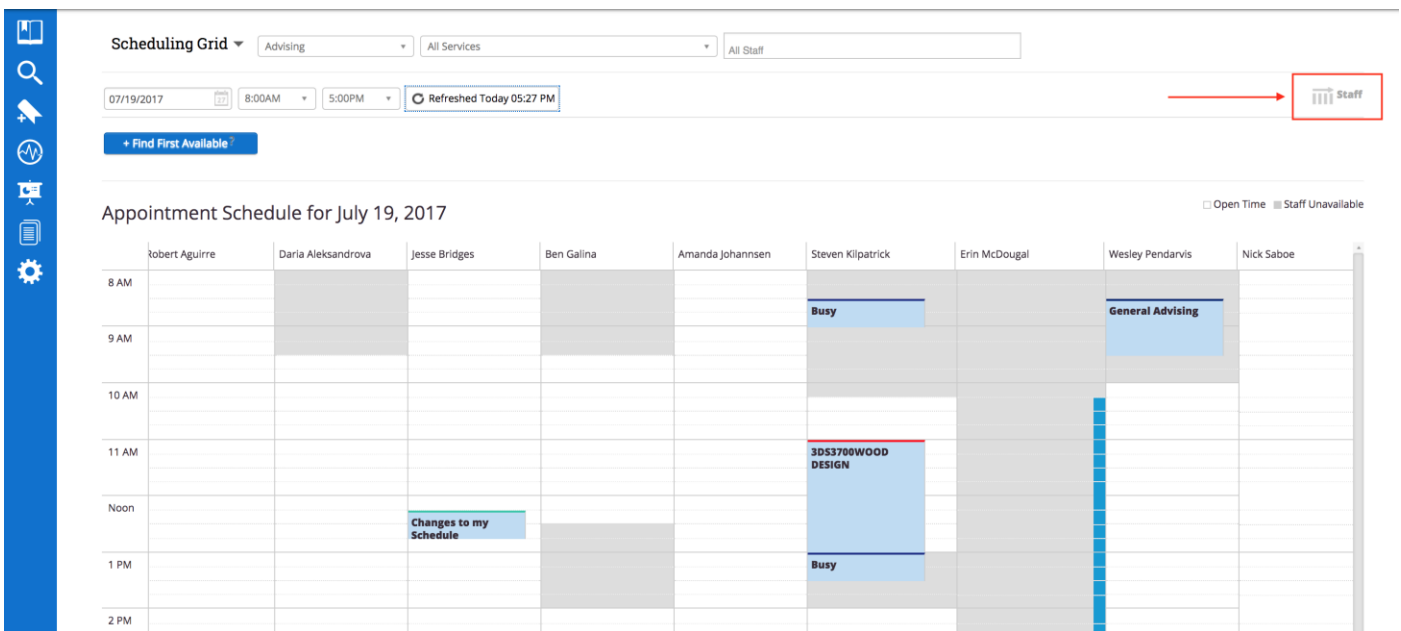
Appointment Schedule for July 19, 2017

	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

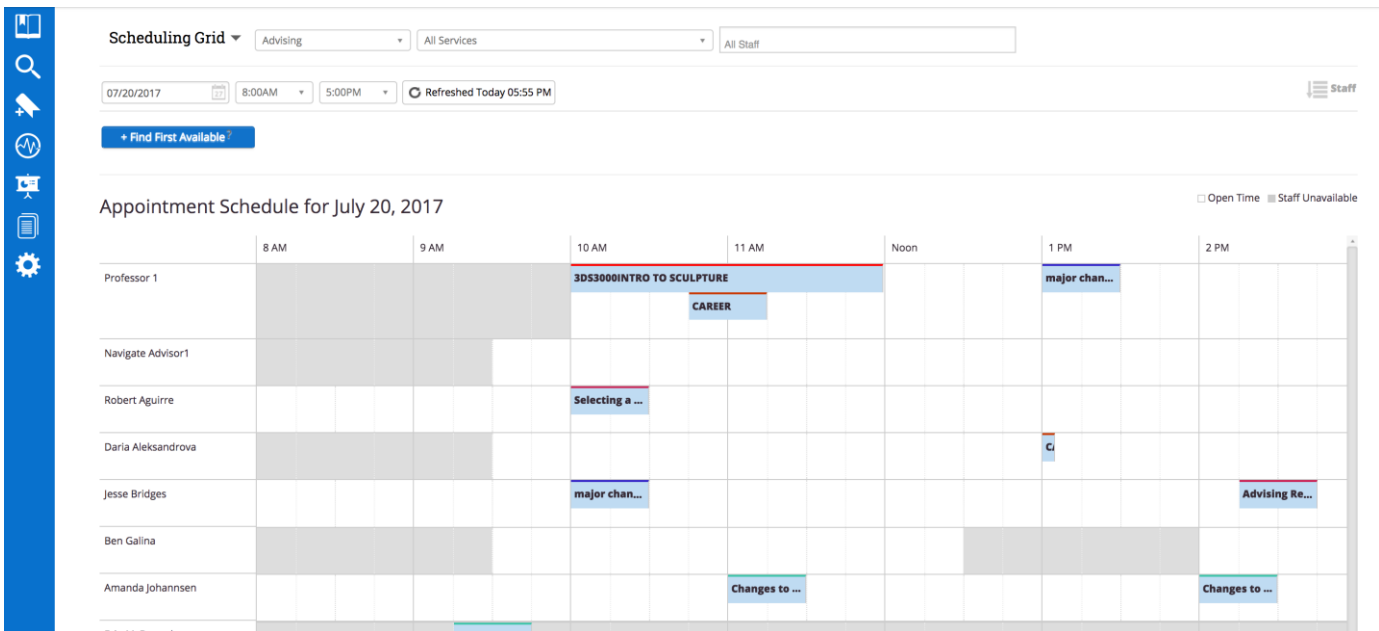
+ Find First Available?

Appointment Schedule for July 19, 2017

□ Open Time ■ Staff Unavailable

	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?

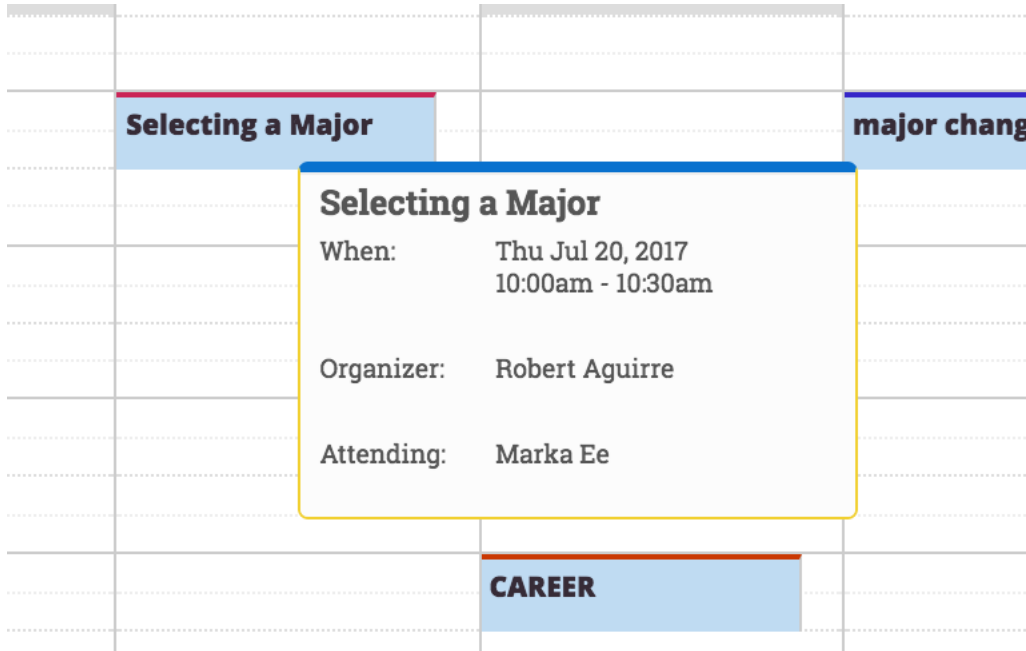
Appointment Schedule for July 20, 2017

□ Open Time ■ Staff Unavailable

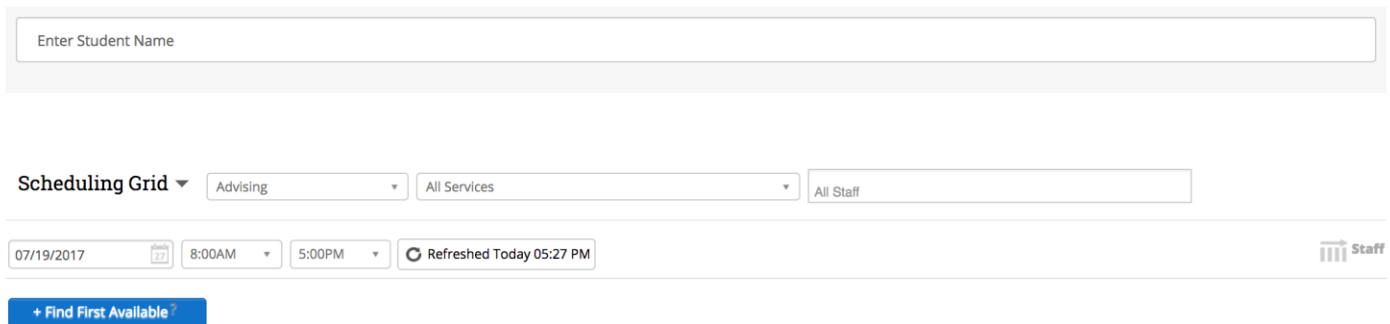
	8 AM	9 AM	10 AM	11 AM	Noon	1 PM	2 PM
Professor 1			3DS3000INTRO TO SCULPTURE	CAREER		major chan...	
Navigate Advisor1							
Robert Aguirre			Selecting a ...				
Daria Aleksandrova						Ci	
Jesse Bridges			major chan...				Advising Re...
Ben Galina							
Amanda Johannsen				Changes to ...			Changes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

Scheduling Grid Interactions

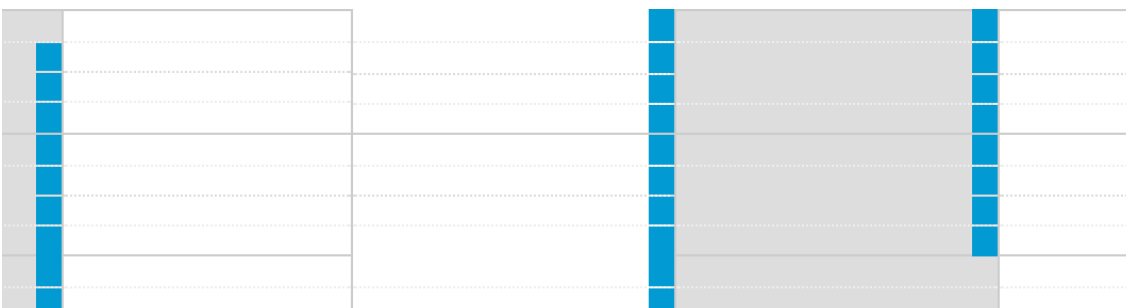
If you hover over appointments, you will notice a pop-up that will display some details about the block you are hovering over.



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.



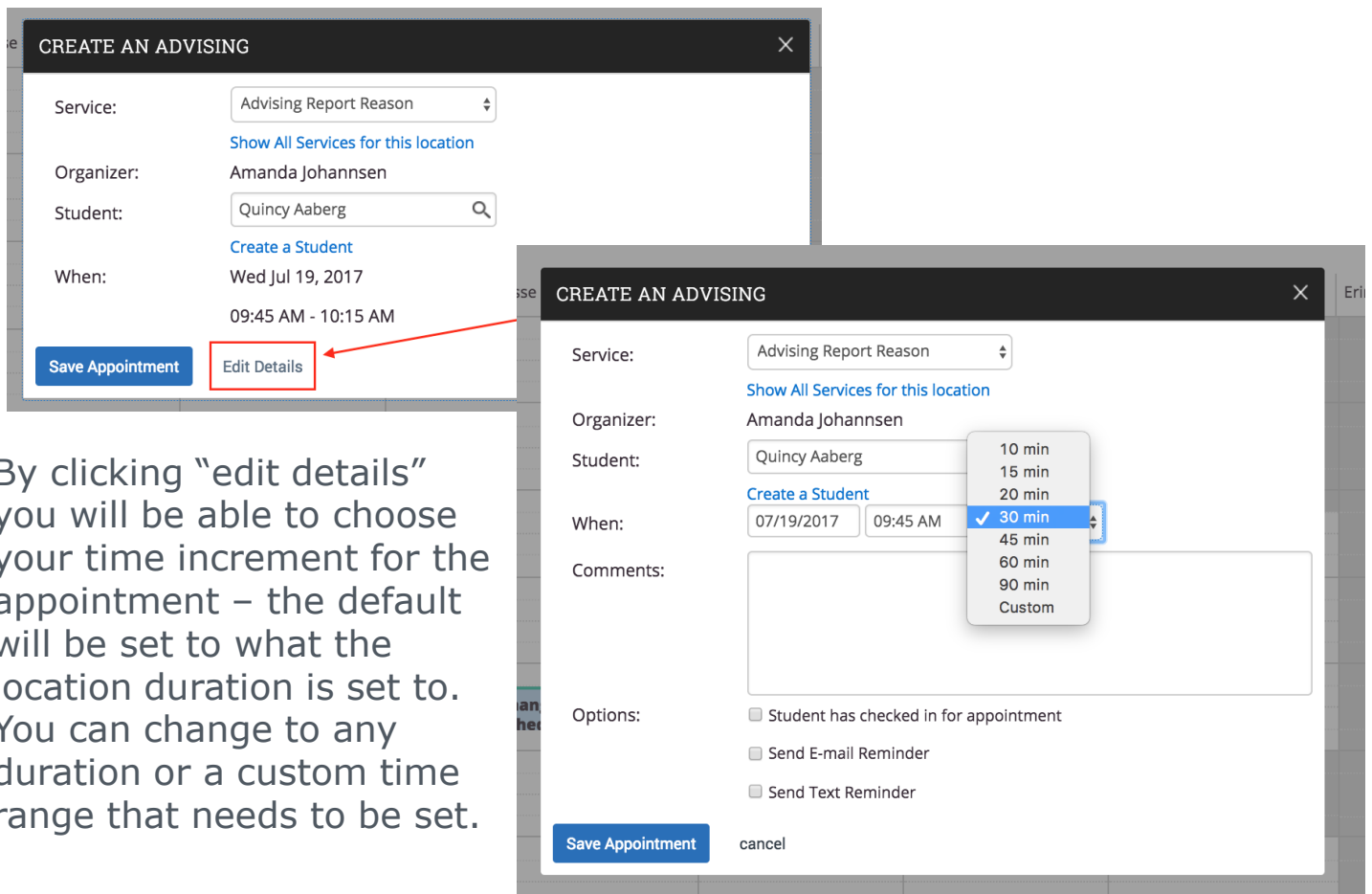
Time Grid for Appointments and Availabilities

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 an arrow pointing to the right screenshot. 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 appointment 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 appointment 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 ▼ ▼ ▼

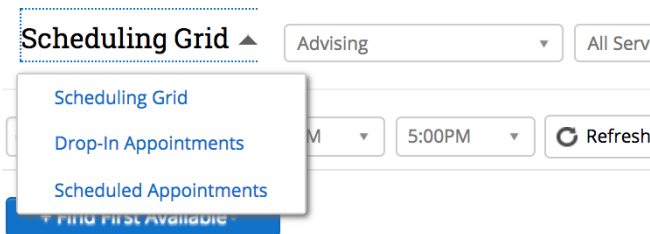


Scheduled Appointments For 07/20/2017

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

+ 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

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