

---

**INTERNAL**

## Coordinated Services

Summer 2017

Thanks for checking in to see what's new in this EAB release. This document shares the updates planned for the forthcoming release. **Please note that the ultimate release timeline, as well as the inclusion of the items outlined below, is determined based on the final stages of testing.**

### 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

### Scheduling

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

### 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" Tab in Appointment Center
- "In Progress" and "Upcoming Appointment List" Tabs in Appointment Center



# Administration

- 
- Administration Page
  - User Role Permissions

# New Feature: Administration Page Restructuring

---

As part of this release, 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:

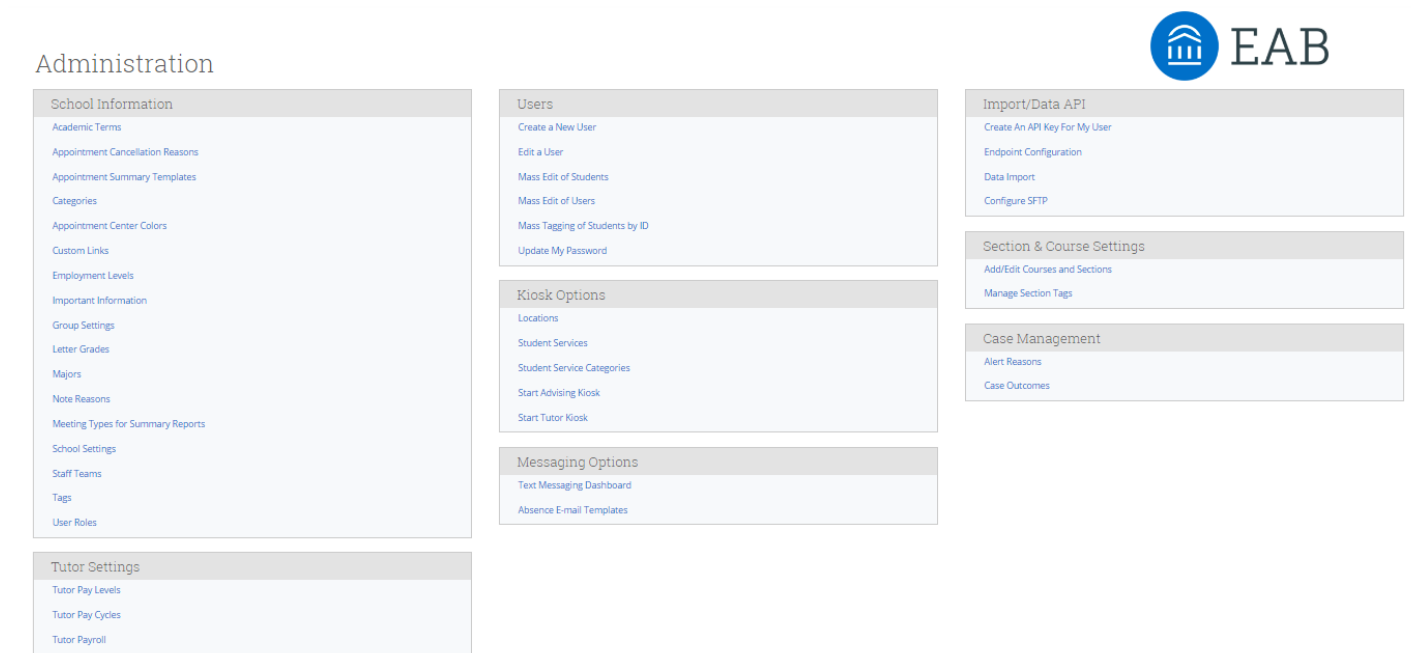
- School Information
- Tutor Settings
- Users
- Kiosk Options
- Messaging Options
- Import Data/API
- Section & Course Settings
- Case Management

## 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

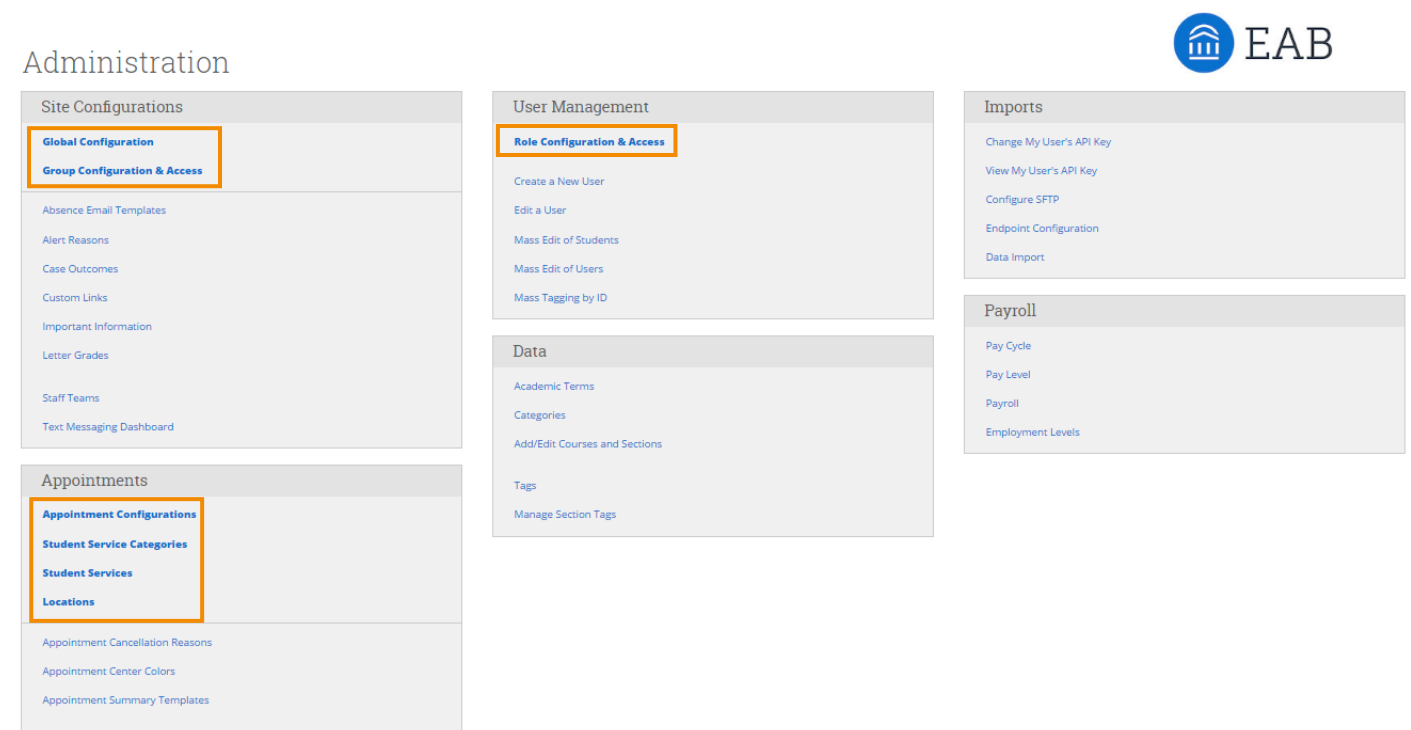
Section & Course Settings

- 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

# New Feature: User Role Permission Restructuring

---

As part of this release, 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

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

The screenshot shows the 'Add New Role' form with a 'Role Details' section. It includes input fields for 'Name of Role:' and 'External Identifier of Role:'. A checkbox labeled 'Enable email privacy protection.?' is highlighted with a dashed orange border.

The screenshot shows the 'Add New Role' form with a 'Role Details' section. It includes input fields for 'Name of Role:' and 'External Identifier of Role:'. The checkbox 'Enable email privacy protection.?' has been removed.

## 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

The screenshot shows the 'Standard User Types' list with the following options: Administrator, Advising, Coaching, Professor, Student, Study Hall Monitor, and Tutoring. The 'Advising' and 'Tutoring' options are highlighted with dashed orange borders.

The screenshot shows the 'Standard User Types' list with the following options: Administrator, Staff, Coaching, Professor, Student, Study Hall Monitor, and Coach/Tutor. The 'Staff' and 'Coach/Tutor' options are highlighted with solid orange borders.

# 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 '**Institution Reports and GradesFirst 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?

#### 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 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<sup>?</sup>
- Organizers Edit Their Own Appointments  
Advisors and tutors can edit appointments they are in charge of.
- Appointment Delete<sup>?</sup>
- Organizers Delete Their Own Appointments<sup>?</sup>
- Create Appointments for any applicable user<sup>?</sup>
- Cancel Appointments or any person's Attendance to it
- Appointment Cancellation Administration<sup>?</sup>
- 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<sup>?</sup>
- Organizers Edit Their Own Appointments  
Staff and Coach/Tutor can edit appointments they are in charge of.
- Appointment Delete<sup>?</sup>
- Organizers Delete Their Own Appointments<sup>?</sup>
- Create Appointments for any applicable user<sup>?</sup>
- Cancel Appointments or any person's Attendance to it
- Appointment Cancellation Administration<sup>?</sup>
- 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

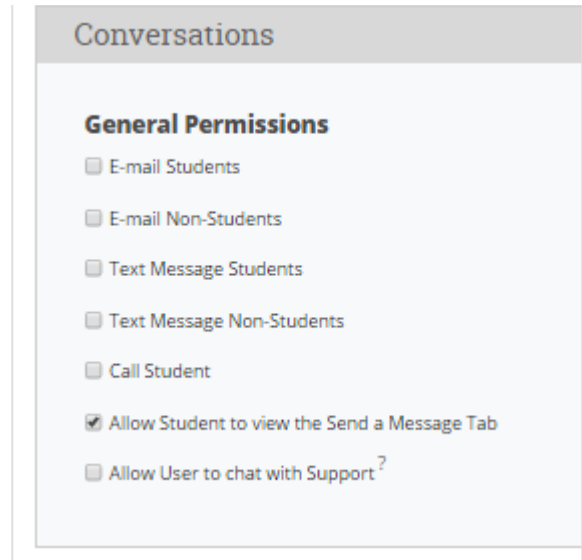
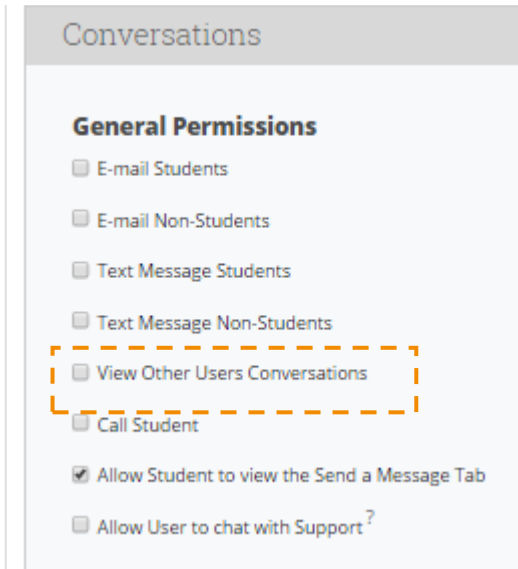
**Availability Permissions**

- 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



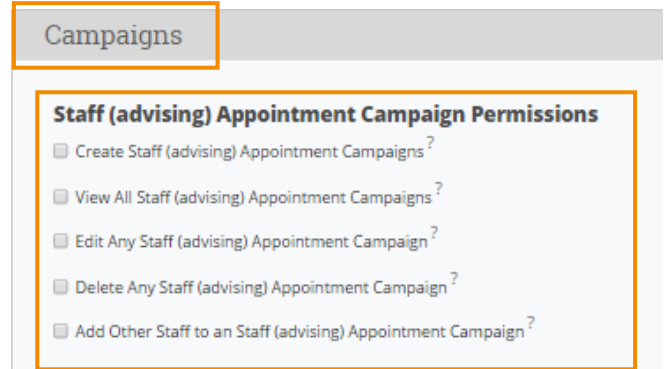
## Edited: 'Campaigns & Travel Letters'

- 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<sup>?</sup>

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<sup>?</sup>

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<sup>?</sup>

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<sup>?</sup>

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
- Relocated the Watch List permission to this 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

**Watch List Permissions**

- Watch list

# 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<sup>?</sup>
  - 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<sup>?</sup>
  - Mass Print - Student Calendars<sup>?</sup>
- Travel Letter Permissions**
  - Travel Letter Administrator<sup>?</sup>
- 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<sup>?</sup>
- Data Imports
- API Access
- Location Administration
- Important Information Administration
- Grades Administration
- Student Services Administration
- View Help Center<sup>?</sup>
- Role Administration
- School Settings Update
- Student Mass Edit
- Tag Administration
- Term Administration
- Text Message Administration<sup>?</sup>
- Advisor Reports
- View Advisor Availability Report
- User Impersonation<sup>?</sup>
- Alert Reason Administration<sup>?</sup>
- Case Management Administration<sup>?</sup>
- 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<sup>?</sup>
- 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<sup>?</sup>
- Staff Reports
- View Staff Availability Report
- User Impersonation<sup>?</sup>
- Alert Reason Administration<sup>?</sup>
- Case Management Administration<sup>?</sup>
- 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<sup>?</sup>
- Edit Exchange Mailbox<sup>?</sup>
- Allow Exchange Calendar Sync<sup>?</sup>

## 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<sup>?</sup>
- Edit Exchange Mailbox<sup>?</sup>

## 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 Campus.

**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.

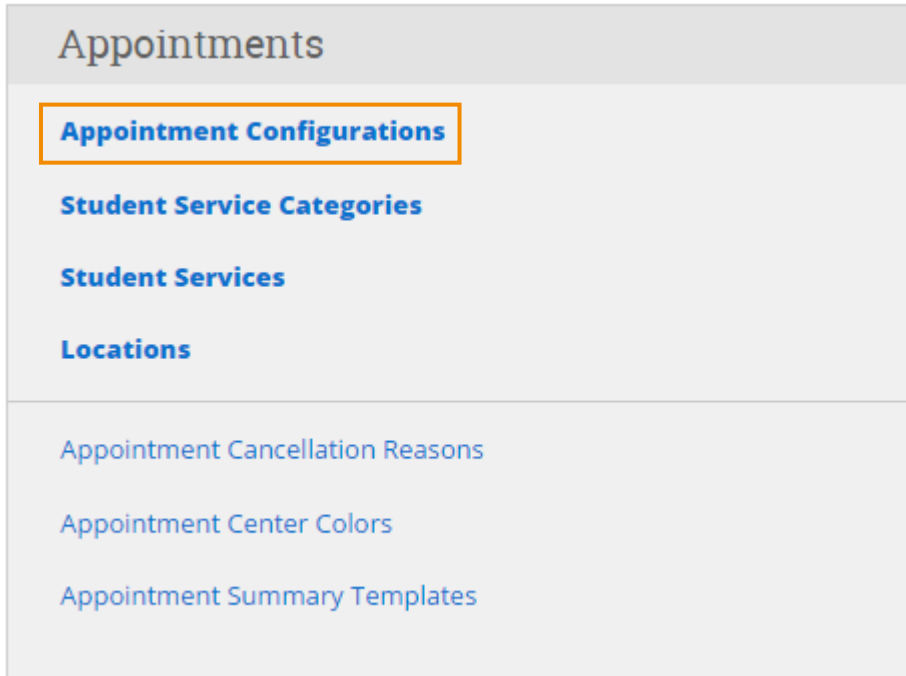
### **Impact:**

- 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

A screenshot of the "Edit Advising" configuration page. The page is titled "General Settings" and contains three input fields with associated labels and callouts:

- Name:** Advising
- Display Name:** Student Support. A callout box points to this field with the text: "Display Name will change the way 'Advising' is referred to throughout the site".
- Title for the Staff Member Running the Appointment:** Staff. A callout box points to this field with the text: "Title will change the way 'Advisor' is referred to throughout the site".

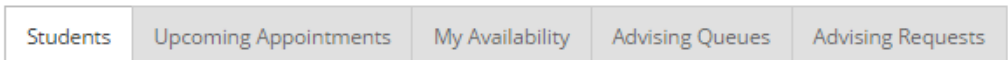
# Display of Appointment Configurations

## Site Impacts:

### Home Screen Title & Tabs

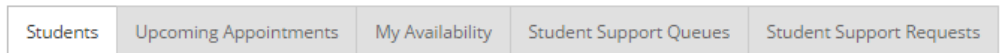
#### Before

## Advisor Home ▾

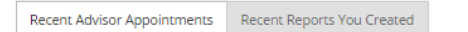


#### After

## Staff Home ▾



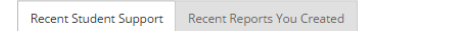
## Advisor Reporting



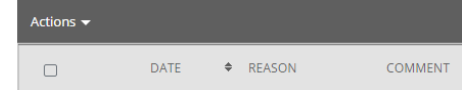
### Recent Advising Appointments



## Staff Reporting

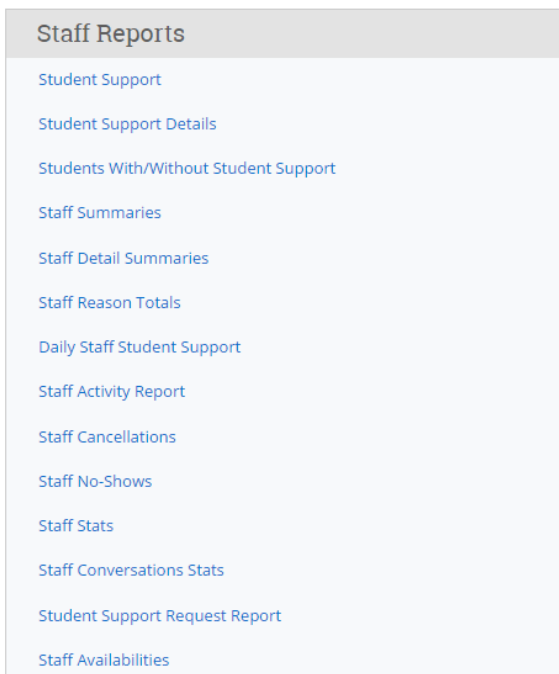


### Recent Student Support



### Report Titles

#### Before



#### After



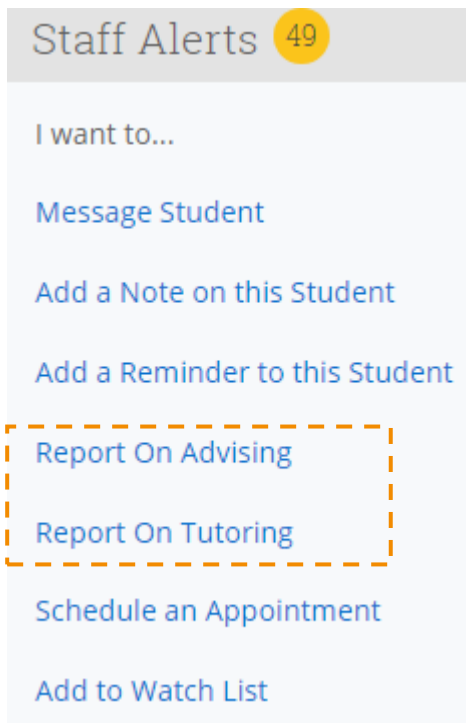
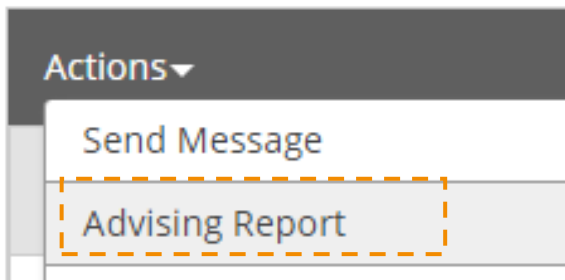
# Display of Appointment Configurations

## Site Impacts:

### Summary Reports

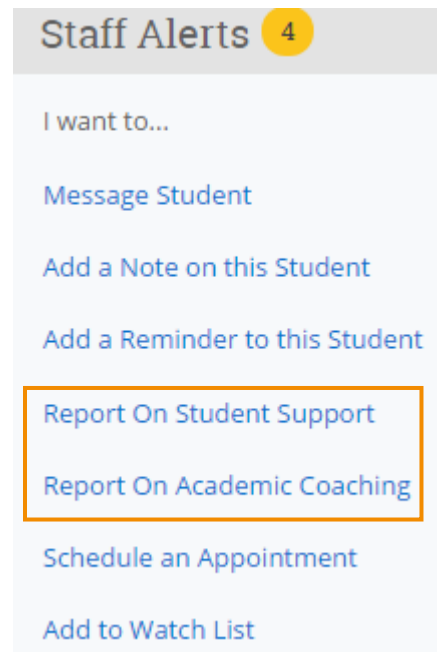
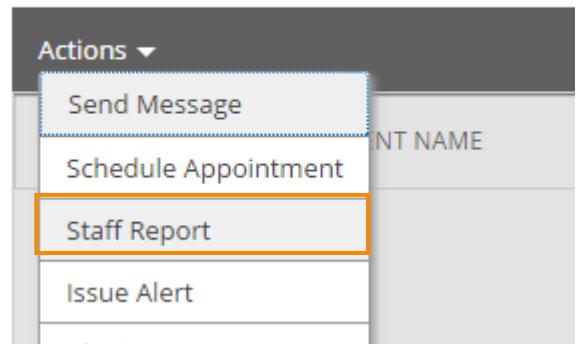
#### Before

## 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
<b>Morning</b> 4 Available	<b>Morning</b> 17 Available	<b>Morning</b> 20 Available	<b>Morning</b> 20 Available	Morning N/A
<b>Afternoon</b> 17 Available	<b>Afternoon</b> 17 Available	<b>Afternoon</b> 18 Available	<b>Afternoon</b> 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 →



# 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						
<input checked="" type="checkbox"/>	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

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

Appointment Campaign:

- Biology Advising Campaign
- \* General Advising

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

Actions ▾				
	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

# New Feature: Enabling Weekend Scheduling

---

As part of this release, we've allowed for appointment scheduling on weekends.

**Before:** The student facing scheduling grid was restricted to weekdays.

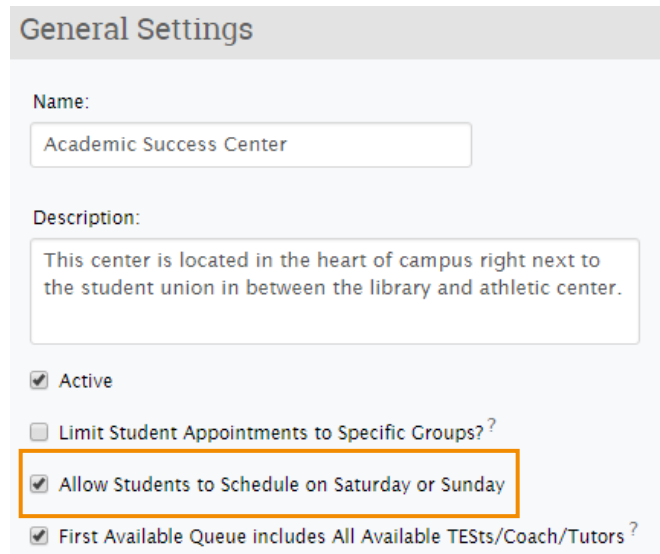
**After:** Students scheduling their own appointments would now see Saturday and Sunday as options if this is enabled for a location.

To enable this weekend scheduling feature please connect with your SSC Consultant.

## How to Configure:

Once enabled for the platform, configure whether or not the scheduling grid should display weekends within each specific location.

- Navigate to the Administration page and select Locations from the Appointment section.
- Click on the Location for which you wish to allow weekend scheduling
- Under General Settings select the permission to allow students to schedule on Saturday or Sunday



**General Settings**

Name:  
Academic Success Center

Description:  
This center is located in the heart of campus right next to the student union in between the library and athletic center.

Active

Limit Student Appointments to Specific Groups? ?

Allow Students to Schedule on Saturday or Sunday

First Available Queue includes All Available TESTs/Coach/Tutors ?

# Enabling Weekend Scheduling

If the Weekend Student Scheduling feature is enabled, then students will see the next five days available to meet with an organizer including weekends. The scheduling grid will no longer display Monday through Friday regardless of the day of the week but instead will adjust to display five days, the current day and the four upcoming days.

**Note:** If the Weekend Student Scheduling feature is disabled, then students will only see business days (Monday – Friday) in the grid.

## 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 18 Available	Afternoon 20 Available	Afternoon 21 Available	Afternoon N/A	Afternoon 2 Available

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

[◀ Back](#)[Next ▶](#)

# Enhanced Walk-In Screen

As part of this release, we've updated the screen that students will see when they choose to View Walk-In Times during the scheduling process.

**Before:** The Details that advisors and tutors included in their Availability were not displayed on the View Walk-In Times screen.

**After:** Students who choose to View Walk-In Times can now see the additional detail provided by the listed advisors or tutors.

Can't find a time that works in the next couple of weeks? [View Walk-in Times](#) or [Request Advising Appointment](#)

## Before:

### Available Walk-In Times

Academic Advising Center - Lecture Hall
Ashley Liberio Monday-Tuesday, Thursday 8:00am-5:00pm
Monica Wilson Monday-Friday 8:00am-5:00pm
Academic Success Center
Emily Sentz Monday-Friday 8:00am-5:00pm
Kathy Rubin

## After:

### Available Walk-In Times

Academic Success Center
Steven Kilpatrick Monday-Friday 7:00am-4:00pm Please come to my office, Tipton Hall Room 304.
Erin McDougal Monday-Friday 10:15am-3:30pm
Ben Galina Monday-Friday 10:15am-3:30pm
Kirsten Smith Tuesday, Thursday 8:00am-10:30am Office 751 near M Street

## Additional New Feature

The text in the yellow section of the Student Scheduling Screen can now be customized. At the Appointment Configuration level you can now customize the text included in this scheduling grid. There is a separate page in this guide on how to use this feature.





# 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" Tab in Appointment Center
  - "In Progress" and "Upcoming Appointment List" Tabs in Appointment Center

## Updated Feature: Appointment Center User Interface

---

As part of this release, we have redesigned the user interface and interactions within Appointment Center. We have introduced new actions and abilities to manage locations for advising *and* tutoring appointments.

Some of these new functionalities 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” tab with actions for appointments
- New “Scheduled Appointment List” tab with actions for appointments

**Note:** As of July 2017, there will be additional functionalities in this list.

# 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:

Campus Student Success Collaborative®

Whitehurst Uni... Spring Semester 2...

### Appointment Schedule

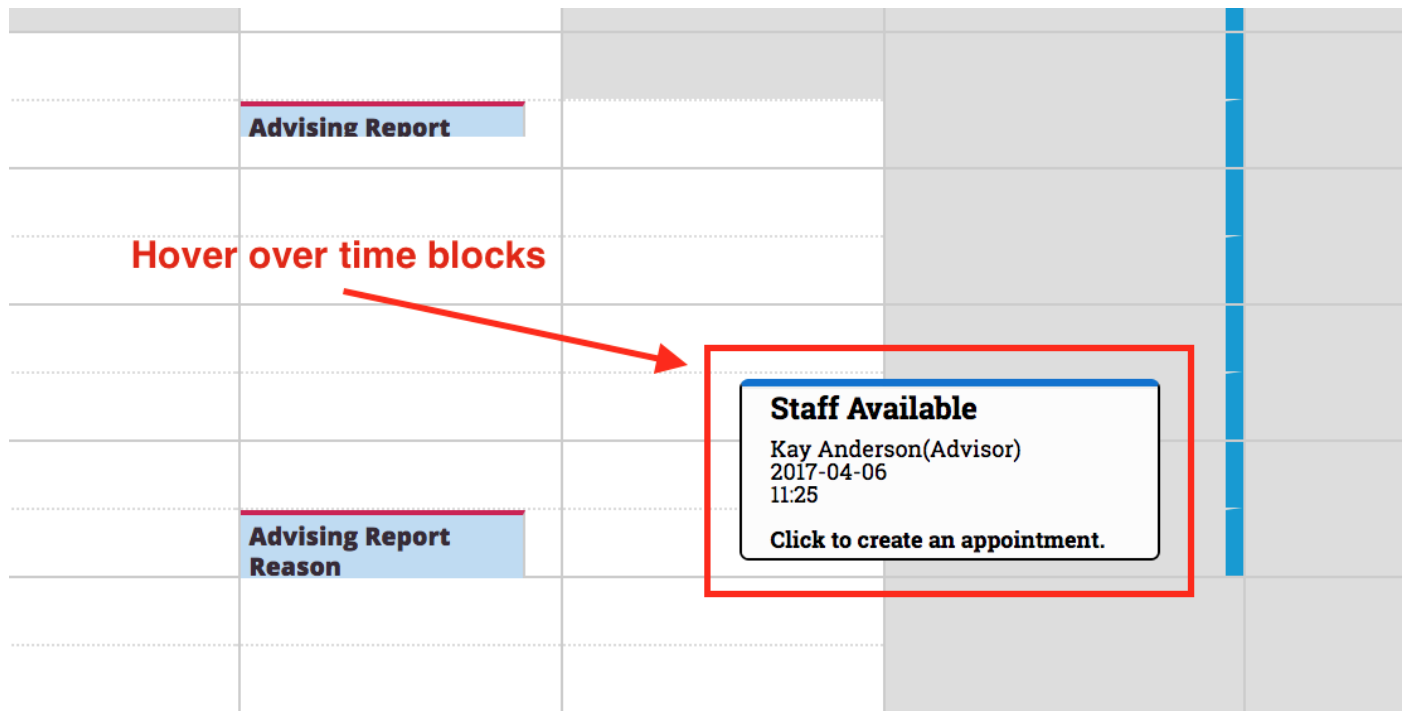
	Robert Aguirre	Daria Aleksandrova	Jennifer Alger	Kay Anderson	Michael Anderson	Amanda Johannsen	Steven Kilpatrick
7 AM			Change Major/Minor				
8 AM	Career Counseling						
9 AM			Advising Report				
10 AM							
11 AM							
Noon							
1 PM			Advising Report Reason				
2 PM							
3 PM							
4 PM							

# 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 “Table Orientation” dropdown, 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.

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



On the left side you will see the default time increment for appointments. You can select anything from 10 – 90 minutes.

If you click the “Display drop-in times” check box, you will be able to view which users are available for drop-in.

## Time Grid for Appointments and Availabilities

If you would like 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 did not already enter 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 screenshot shows a time grid interface with a dialog box titled "CREATE AN STAFF (ADVISING) APPOINTMENT". The grid has columns for staff members: Mulany Blomker, Robert Aguirre, Daria Aleksandrova, Jennifer Alger, Kay Anderson, and Michael A. The rows represent time slots from 7 AM to 3 PM. The dialog box is open over the 10 AM slot for Mulany Blomker. The dialog box contains the following fields and options:

- Service: [Dropdown menu]
- Organizer: Daria Aleksandrova
- Student: Mulany Blomker
- When: 04/06/2017 | 10:00 AM | 11:00 AM (highlighted with a red box)
- Comments: [Text area]
- Options:
  - Student has checked in for appointment
  - Send E-mail Reminder
  - Send Text Reminder

Buttons at the bottom of the dialog: "Save Appointment" and "cancel".

## 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 titled 'Change Major/Minor'. It shows the appointment date and time (Thu Apr 06, 2017, 07:00a - 08:00a), the organizer (Jennifer Alger), and the attending student (Mulany Blomker). The time is marked as 'about 10 hours late'. There is a 'Check-In' button and an 'Actions' dropdown menu. The 'Actions' menu is open, showing options: 'Edit', 'Move', 'Cancel', and 'Message Organizer'. The 'Message Organizer' option is highlighted with a red box.

# Scheduled Appointment List Tab

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 future days and see appointments on the selected date.

## Academic Success Center

Enter Student Name

Service: Advising All Services

Appointment Drop-In Appointments Scheduled Appointment List

Reload  
Last Reloaded at 9:26AM

May 2017

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

0:00a to 12:00p?

### Scheduled Appointments For 05/10/2017

REASON
Change Major/Minor

Actions

- Send Message to Attendee
- Send Message to Organizer
- View Appointment Details
- Check In
- Check Out
- Mark No-Show
- Cancel



# Drop-In Appointments Tab

In many cases, a front desk staff worker may need to view today's appointments. With the "Drop-In Appointments" tab, users can view all of the drop-ins for the current day and take action from the list.

## 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, either the First Available Queue or a specific staff members queue.

**Service:**

[Reload](#)  
Last Reloaded at 9:39AM

View Queue For:

**Michael Anderson** [+Queue](#)  
🕒 Current wait:none  
👤 (0 waiting)

### Students In First Available's Queue

STUDENT NAME	SERVICE
Balthasar Abels	General Advising

**Actions** ▲  
Send a Message  
Move to Top  
Remove

### Students In Robert Aguirre's Queue