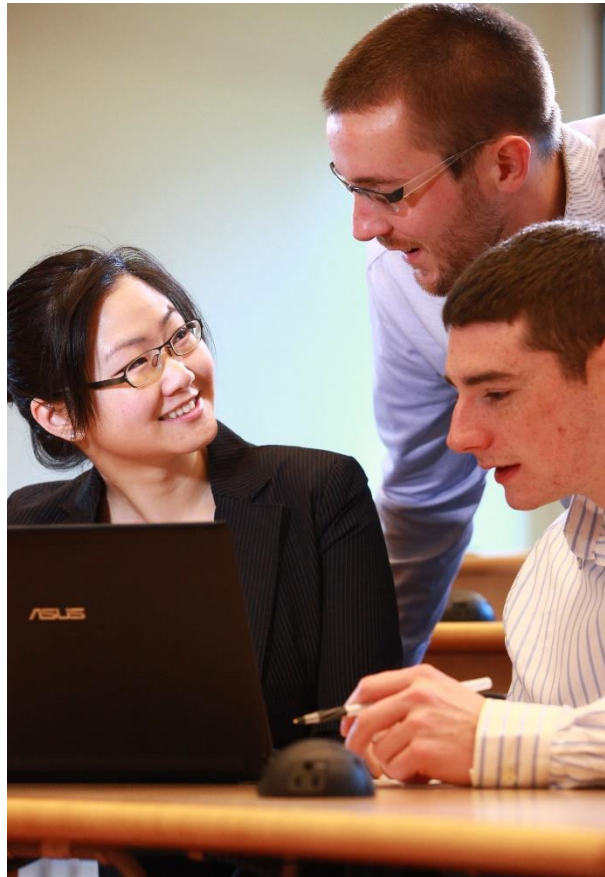


# SSC Campus Advisor User Guide University of Oregon





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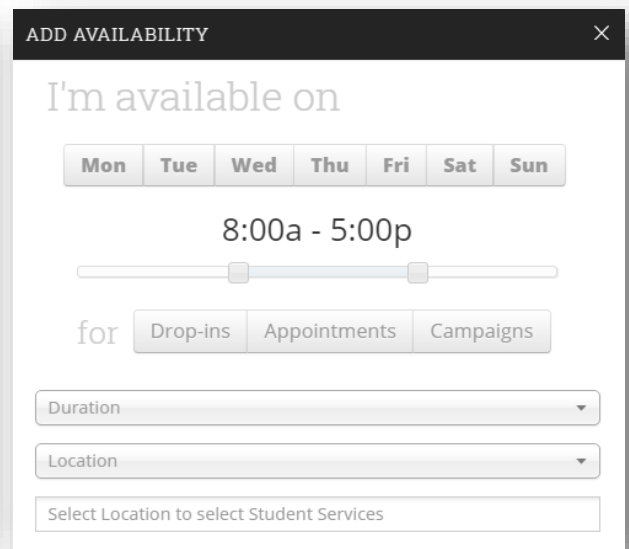
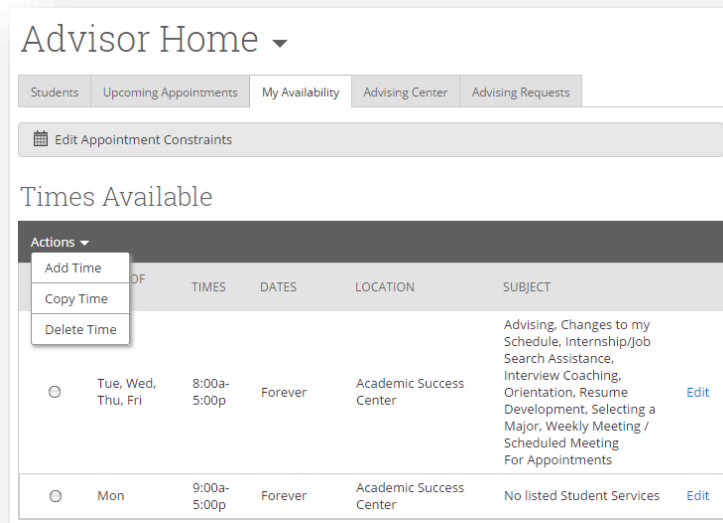
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## Availability

Within SSC Campus, you will set up availability in order to allow yourself and others to schedule with a student. Setting up your availability is a very important starting place, but you can also edit your availability at any time.

## Setting Availability

Define the days and times you will be available to meet with students. If you have questions about locations or selecting student services, please contact your unit Specialist.



**Add Time-** From the Advisor Home page, select the “My Availability” tab

**Step 1:** Click the Add Time button in the Actions drop-down menu.

**Step 2:** Select the days and times when you are available to meet with students.

**Step 3:** Select whether you will meet with students via appointments, drop-ins, or only for specific campaigns during that time.

**Step 4:** Select a duration for this availability,

**Step 5:** Choose the location where you will be available.

**Step 6:** Select which student services you can provide to students during this availability. **Note: Leaving this student services field empty means you will appear to be available for all advising student services.** We currently suggest this.

**Step 7:** Input any details such as a specific office location, check-in procedures, and/or things you want an attendee to bring to the meeting. These details should only be things that apply to every appointment of the type you are setting availability for, as the details will appear in a message to the person scheduled with.

**Last step:** Click the Save button.

**Note:** Repeat this process until all of your availabilities have been defined. You can have as many availabilities as needed.

There are two other options in the Action drop-down menu under Times Available.

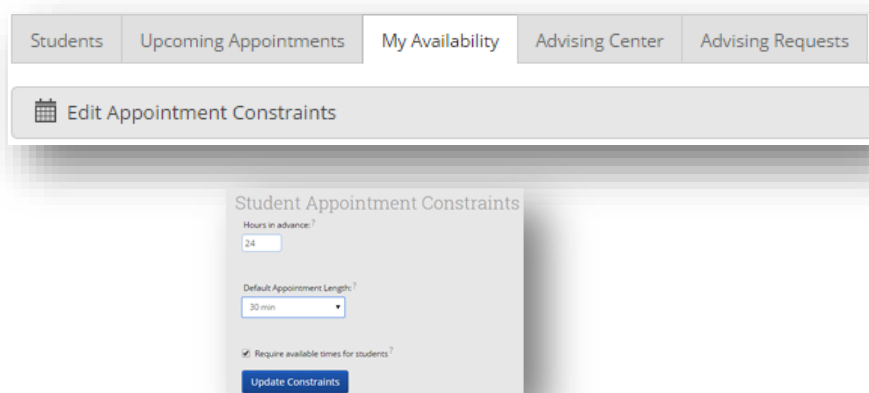
**Copy Time** - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied and a dialog will open allowing you to make edits or to save your newly created availability.

**Delete Time**- to delete your time, simply select the time and click the Delete Time button.

**Note:** Inactive availabilities are highlighted in red in the Times Available grid.

## Appointment Constraints

The “edit appointment constraints” feature is directly related to when students schedule their own appointments with advisors. You can define parameters that control your availability to students. If you or your department are not using the function to allow students to schedule appointments for themselves, this function can be ignored.



**Hours in Advance** refers to how many hours, from the current time, a student must wait before they can schedule an appointment. For instance in the example above, if the current time is 10:00am, the earliest a student would be able to schedule an appointment with you would be 10:00am, the following day. This setting only applies to students making appointments. We highly recommend that you set this for 12 hours so that a student could schedule an appointment easily for the following day.

**Default Appointment Length** is the default length of this specific advisor’s appointment. This can be overridden by users with the appointment create permission, except by students, during appointment creation.

**Require available times for students** means that advisors must have defined Times Available (see section below) before a student can create an appointment with them. If this box is not checked, students are able to schedule with that advisor at any time and day. This box is checked by default. We recommend that advisors use this default during setup.

Click the “Update Constraints” button to save your changes. Then, to hide the Student Appointment Constraints setting box, you can simply click on the “Hide Constraints” link.

## Appointments

There are many ways to schedule within the SSC Campus platform. Below instructions are provided for scheduling an appointment from the perspective of an advisor. Front desk staff will schedule in a different way and eventually students may be able to schedule appointments for themselves, which will involve another method as well.

### Scheduling Appointments

There are two ways to get to the Schedule an Appointment page:

- Click on Schedule General Event on the Quick Links Menu.
- If you have lists of students, an appointment can be scheduled by checking the box beside a student's name and then selecting 'Schedule Advising Appointment' from the Actions drop-down menu.

**Schedule Appointment**

SSC University

Filters

Type: Advising Appointment

Reason(s): Advising

Comments:

Location: Academic Success Center

Select a Date: October 2015

SELECT	ADVISOR	AVAILABLE TIMES
<input type="radio"/>	Brown, Tim	mon-tue, thu 11:00am-3:00pm <b>Drop-In Availability:</b> mon-tue, thu 2:00pm-5:00pm
<input type="radio"/>	Eagan, John	mon, wed, fri 12:00pm-5:00pm tue, thu 2:00pm-5:00pm <b>Drop-In Availability:</b> mon, wed, fri 8:30am-12:00pm
<input type="radio"/>	Hamzaee, Maanie	mon-fri 5:00am-9:00pm
<input type="radio"/>	Hoffman, Doug	mon-fri 8:00am-5:00pm
<input type="radio"/>	Irish, Allie	mon-fri 9:00am-4:30pm (September 18, 2015 - February 8, 2016)
<input type="radio"/>	Kilpatrick, Steven	tue, thu 10:45am-4:00pm (Fall 2015) mon, wed, fri 10:15am-5:00pm <b>Drop-In Availability:</b> mon, wed, fri 10:15am-5:00pm (Fall 2015)

Save Appointment Cancel

Reminders: Send an email reminder?

**Step 1- Type** - Select appointment type from the drop down menu in the 'Type' box.  
Note: A General Event is for non-advising and non-tutoring appointments.

**Step 2- Reason** - Select the reason for the appointment

**Step 3- Detail** - Add detail about the reason for the appointment. These comments are **seen by both the student and the advisor** when they look at their calendar and receive their appointment notification email. This section should be used only if more detail is needed to identify what will be discussed in the appointment.

**Step 4- Location** - Select the location where you will meet your students from the drop down list.

**Step 5- Date** - Click on a date on the month-in-view calendar to see a week of availability on the scheduling grid (step 11).

**Step 6- Reminders**- check the boxes for the type of reminder you would like to have sent on day of the appointment. The email reminder is sent the morning of the appointment and the text message reminder is set “x” number of minutes before the appointment. Note: Text reminders are not currently available through the UO live system.

**Step 7- People Attending** - lists the users who will be scheduled for this appointment. The user scheduling the appointment is able to *Remove* or *Add an Attendee* prior to saving the appointment.

**Step 8- Add Attendee** - Add a student (or other attendees) without having to exit the schedule appointment page. Type in the students' name or ID number, select them, and they will be added to the appointment.

**Step 9- Select an Advisor** – select someone from the list of advisors who have availability at the selected Location. If you are creating an appointment for yourself, simply check your name.

**Step 10- Length** -refers to the length of the appointment. While it will default to whatever the advisor had setup in the availability, it can be overridden here.

**Step 11- “Choose A Time To Meet”** is where you will actually select what time this appointment will take place. There will be a checkbox for any times that are available for scheduling. If something is already scheduled or conflicts with that time, you will see that notated on the grid. For example, Appointments, Free, Busy, Conflicts (such as a student’s class), or in some cases Drop In's for walk-in appointment times. A blank means the selected advisor does not have availability for that time on that day. You can click on the word Conflicts or Appointment to see who has a scheduling conflict.

The screenshot shows a web interface titled "Choose A Time To Meet". At the top, there is a "Length:" dropdown menu set to "30 min" and an "Availabilities:" dropdown menu set to "Show Availabilities for This Course/Reas...". Below this is a grid with columns for dates from 10/11 (SUN) to 10/17 (SAT) and rows for time slots from 6:00a-6:30a to 11:00a-11:30a. The grid cells are color-coded: red for "CONFLICTS", green for available slots with a checkbox, and blue for "DROP-IN".

TIME SLOT	10/11 (SUN)	10/12 (MON)	10/13 (TUE)	10/14 (WED)	10/15 (THU)	10/16 (FRI)	10/17 (SAT)
6:00a-6:30a							
6:30a-7:00a							
7:00a-7:30a							
7:30a-8:00a							
8:00a-8:30a	CONFLICTS	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	
8:30a-9:00a	CONFLICTS	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	
9:00a-9:30a	CONFLICTS	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	CONFLICTS	<input type="checkbox"/>	
9:30a-10:00a	DROP-IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10:00a-10:30a	DROP-IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10:30a-11:00a	DROP-IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11:00a-11:30a	DROP-IN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Note: Availabilities is where you can override preset availabilities and schedule the appointment at any time at any day. Select the option ‘Ignore Availabilities, unlock the calendar’ and you will see checkboxes appear in every field in the grid. Selecting this option allows you to override any conflict or non-available day to schedule the appointment exactly where and when you want it.

**Step 12-** Repeat This Appointment? Is where you can make this appointment recurring. The default is set to “Does not repeat.” You may select other options from the drop-down list if you wish to make an appointment repeat.

**Step 13-** To finish, review you selections then click the “Save Appointment” button. When the appointment is saved, the system will send appointment notification emails to each of the attendees with the details of the appointment. It will also update each attendee’s calendar.

## Upcoming Appointments

The purpose of this tab is to give the advisor a quick way to view and manage upcoming appointments.

Actions	DATE	ATTENDEE	REASON	COMMENT	REPORT FILED?	DETAILS
<input type="checkbox"/>	10/16/2015 01:30p - 02:00p	Gonzalez, Laura	Advising		Not Yet.	<a href="#">Details</a>

Please note that as soon as the appointment time starts, that appointment will drop off this list and appear on the “Recent Advising Appointments” grid. For example, if an advisor has an appointment today at 9:30am, as soon as the time reaches 9:30, that appointment will be dropped from the Upcoming Appointments list and added to the Recent Advising Appointments list.

## Cancel an Appointment

From the Upcoming Advising Appointments tab, check box next to the appointment and click the Cancel Appointment under Actions drop-down menu.

Notice, the advisor is given the option for whom to cancel the appointment for, required to select a reason why the appointment is to be cancelled and lastly an option to enter a comment about the cancellation. Clicking the Cancel Appointment button will instantly send out Cancellation Emails to all of the attendees alerting them the appointment has been cancelled.

By default, the Upcoming Appointments tab will NOT show cancelled appointments. Check the “Show Cancelled” check box to include cancelled appointments in the list of upcoming appointments.

**CANCEL UPCOMING APPOINTMENT**

Cancel Appointment For:

Reason:

Comments:



## Advising Center

The Advising Center tab allows advisors to monitor and maintain visits for students in their queue or other advisors' queues. Select the "Advising Center" tab to see this listing.

### Students Who Have Checked in for Their Appointments

This grid shows any students who have checked in for an appointment scheduled with you. These are NOT drop-in students. Drop-in students will never show up here.

The screenshot shows the 'Advising Center' tab with the following data:

SELECT	NAME	REASON	TIME OF APPT.
<input type="radio"/>	Robinson, Sarah	Advising	11:30a-12:00p

SELECT	NAME	REASON	COMMENT	FIRST AVAILABLE	PRIORITIZED AT	CHECKED IN AT	WAIT DURATION
<input type="radio"/>	Robinson, Sarah	Advising				10:31a	399 hr 25 min

SELECT	NAME	ADVISOR	REASON	COMMENT	PRIORITIZED AT	CHECKED IN AT	WAIT DURATION
<input type="radio"/>	Aarons, Lilanna	Visor, Addie	Career Counseling			10:33a	2487 hr 23 min
<input type="radio"/>	Matthews, Peter	LeDuc, Brian	Advising			3:31p	730 hr 25 min

### Students In My Queue

This grid displays drop-in students. Students will show up here if they are waiting for the first available advisor (there will be a "Yes" in the "First Available" column) OR if they have requested to meet specifically with you but do not have a scheduled appointment (the section under "First Available" will be blank).

### Students in Queue for Other Advisors

These are drop-in students who have requested to meet with another advisor AND students that have checked-in for a schedule appointment with another advisor. Your office will decide if you should monitor this for students waiting a long time.

## Starting an Appointment

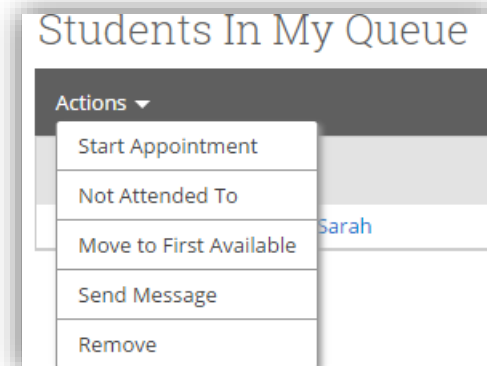
To start an appointment from any queue:

**Step 1-** Click the circle beside the student with whom you will meet.

**Step 2-** Click the "Start Appointment" button in the Actions drop-down menu.

**Step 3-** An Advising Report will open to fill out at the conclusion of your appointment.

Note: Open the student's profile in another tab or window on the internet browser **prior** to starting an appointment in SSC Campus. This will allow for viewing student information and keeping the Advising Report open.



Other options in the Actions drop-down menu in some of the queues will include:

**Not Attended To:** This option should only be used at the end of your day/shift to signify which students you were not able to meet with.

**Move to First Available:** To move a student to the First Available queue, select the student and then click the link to Move to First Available.

**Send Message:** If you would like to send a message via email or text to a student, select the student and click Send Message.

**Remove:** You should use this action when a student leaves without first meeting with an advisor. You should then “Remove” them from the list. This is different than the “Not Attended To” option in that the Not Attended To option should be used when the student actually waited to meet with an advisor but there was not enough time, while the Remove option is for when the student leaves, of their own accord, without meeting with an advisor.

### Advising Queue Shortcut

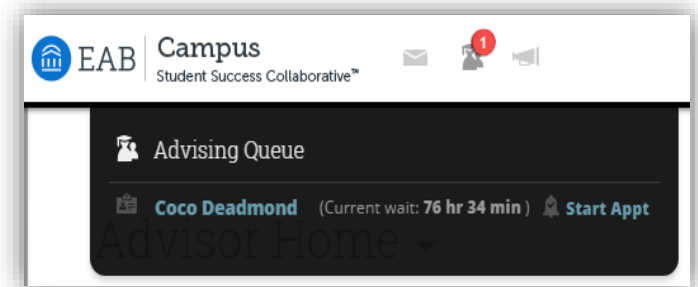
The Notification Bar (top left of your screen) includes the Advising Queue icon (person in graduation cap, with a person behind them) and provides a shortcut to the Advising Queue.

To start an appointment from this shortcut:

**Step 1-** Click on the Advising Queue icon.

**Step 2-** Select “Start Appt” next to the student you wish to meet with.

**Step 3-** An Advising Report will open to fill out at the conclusion of your appointment.



Note: Open the student’s profile in another tab or window on the internet browser prior to starting an appointment in SSC Campus. This will allow for viewing student information and keeping the Advising Report open.

## Notifications

Each advisor will need to set their notification methods of how they will be notified when a student visits the Advising Center.

To set up notifications:

**Step 1:** Click the “Advising Center” tab on the Advisors home page.

**Step 2:** At the very top of this page, select notification method(s). Check the box(es) next to the preferred notification method(s). Select from ding (audible), email, and/or text message.

**A student is added to a waiting list –**

Notifications are sent via ding (audible), pop up message (top right side of your screen), email and/or text message if selected.

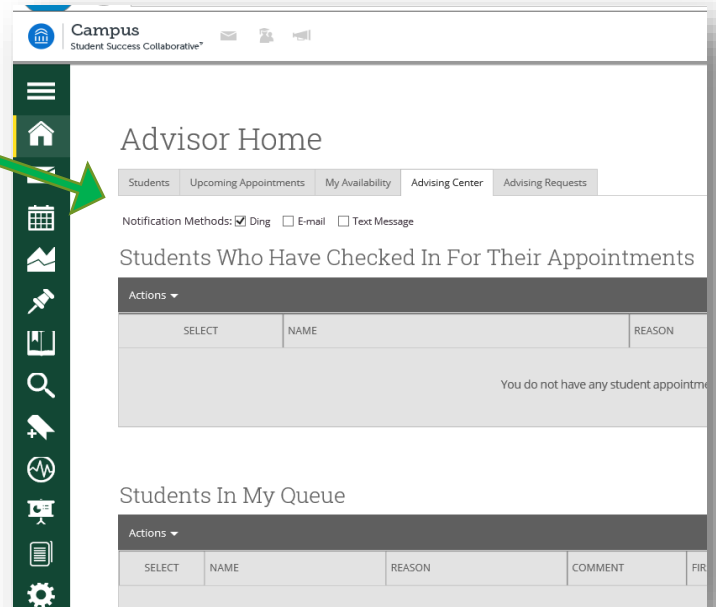
**An appointment is created –** Notifications are sent via email (these notifications go out regardless of selected notification types, when an appointment is created).

**A student checks in for an appointment –**

Notifications are sent via ding (audible), pop up message (top right side of your screen), or email. The email notifications that are sent are advising appointment emails e.g. “A student has checked in for the appointment”.

**An appointment is cancelled –** Notifications are sent via email. Email notifications go out when the student appointment is cancelled on their calendar.

**A student is removed from the queue –** Notifications are sent via pop up message.



## Advisor Reports

The “Create an Advising Report” dialogue box opens automatically when you start an appointment with a student. A report can also be added after an appointment.

At the bottom of the Advising Home page is an area called “Advisor Reporting”. This is where you will find a listing of all your previous advising appointments and advising reports that have been filed or need to be filed.

To add a report, check the box next to the student’s name and then select “Add Advising Report” from the Actions drop down menu.

### Create an Advisor Report

**CREATE AN ADVISING REPORT**

**Appointment Details**

**Appointment:** 04/11/2016 3:30p-4:00p - Academ

**Reason:** Academic Advising

**Meeting Type:** Select Meeting Type

**Course:**

**Date of visit:**

**Location:** Office of Academic Advising

**Attendee**

**Megan Flanigan**

Arrived: 03:30 PM Departed: 04:00 PM

This person attended

**Attendee**

**Sean Ryan**

Arrived: 03:53 PM Departed:

This person attended

**Appointment Summary And Reminders**

**Summary**

**Suggested time:**  **Suggested date:**

This will be saved on the report as a suggestion. No appointment will be created.

**Attach File**

Choose File No file chosen

**Save this Report** cancel

#### Appointment Details

**Step 1- Appointment-** Shows Date, Time, and type of appointment. You are able to select from a drop-down list any appoint you have had with this student.

**Step 2- Reason-** Select the reason you met with a student.

**Step 3- Course-** If a specific course of the student’s was discussed you may select it. This is something we will not use very often.

**Step 4- Date of visit-** Only available to fill out if adding an Advising Report that is not connected to a scheduled appointment (see drop-in advising below)

**Step 5- Location-** Select your location.

#### Attendee

**Step 6- Your Name-** Will automatically appear and be checked (this is Megan Flanigan in the example)

**Step 7- Other Attendee’s Names-** Any person listed on the appointment, other than the advisor, will appear and time departed can either be filled out manually, or if left blank it will record the time you hit save the report. Uncheck the box labeled “this person attended” if the attendee did not attend the meeting.

## Appointment Summary and Reminders

**Step 8-** Summary- Write the notes of your appointment. Please use departmental standards or the “Guide to Advisor Reports” supplemental document.

**Step 9-** Suggested time & suggested date- Use this section if you suggest that a student schedule a follow-up appointment with you. This **does not** scheduled an appointment with the student, it merely takes notes that a follow-up was discussed.

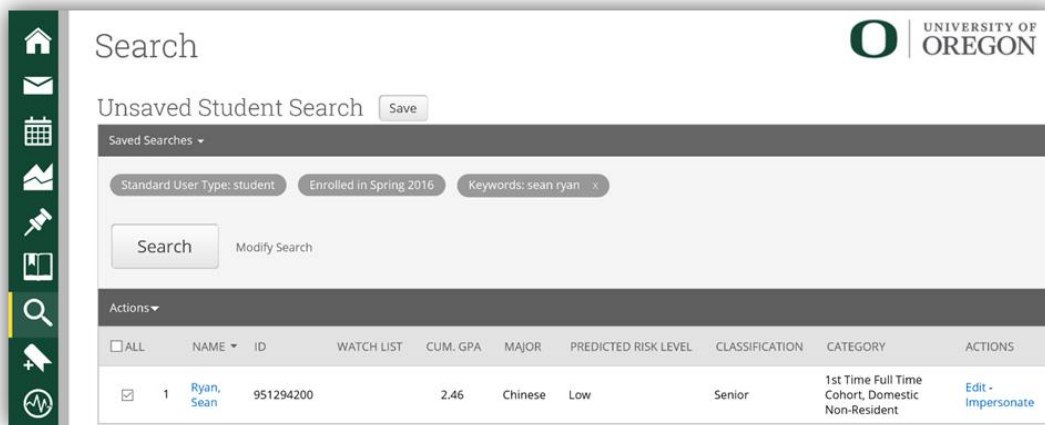
**Step 10-** Attach File- Add a file to the report if appropriate.

**Step 11-** Save this Report- Review all information above and hit this button to enter your Advisor Report.

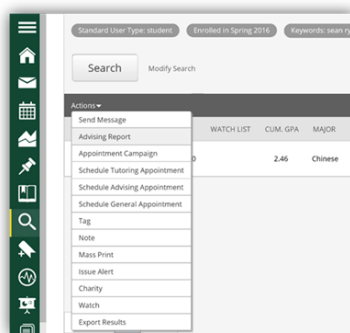
## Advising Reports for students NOT checked in through the kiosk or advising center

In the event that a student drops in to see an advisor and is not checked in for an appointment or drop-in, a report can still be created.

**Step 1-** Check the box next to the student’s name that you wish to write an Advising Report on from the “My Assigned Students” tab or by searching their Student ID in the “Search” section.



**Step 2:** Click the Actions drop-down menu and select “Advising Report.” The “Create an Advisor” report dialogue box as shown above will appear and you can follow the steps above to fill it out.



## Recent Advisor Appointments

This tab displays your recent advising appointments.

Recent Advisor Appointments		Recent Reports You Created						
Recent Advising Appointments								
Actions ▾ <span style="float: right;"><input type="checkbox"/> Show Cancelled</span>								
<input type="checkbox"/>		DATE	REASON	COMMENT	ATTENDEE	ADVISING TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>	1/1	04/12/2016 09:00a - 09:45a	Academic Advising		Ryan, Sean	-	Not Yet.	<a href="#">Details</a>
<input type="checkbox"/>	1/1	04/11/2016 11:30a - 12:00p	Academic Advising	Discuss Pass/No Pass options.	Baker, Gary	1 min	<a href="#">Report Details</a>	<a href="#">Details</a>

**Show Cancelled-** Cancelled appointments are excluded by default. To include those cancelled appointment in this list, simply check the “Show Cancelled” box in the top left-hand corner of this section.

**Details-** The "Details" link allows you to access the “Manage Appointment” dialog to see the details of the appointment.

From the Actions drop-down menu you can:

**Add Advising Report-** File an advising report by selecting this action.

**Mark No-Show-** When a student fails to show up for the scheduled appointment, the advisor can mark them as a no-show using this option.

## Recent Reports Created

This tab displays a list of your recent reports for quick access. Select “Details” to view a report.

Recent Advisor Appointments		Recent Reports You Created			
DATE	STUDENT NAME	SUMMARY	FOLLOW-UP?		
04/11/2016	Baker, Gary	Student came to discuss P/NP but he really came to see An...	No	<a href="#">Details</a>	<a href="#">Delete</a>

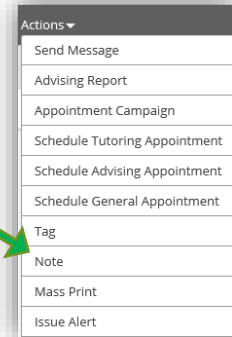
## Notes

Notes can be used to attach documents to a student's record and keep track of information about that student. Notes are for documenting things occurring outside of an advising appointment, such as petition submissions.

### To Add a Note from “Advisor Home” or “Search”

**Step 1-** Check the box next to a student's name.

**Step 2-** Select “Note” from the Actions menu drop-down.



**Step 3-** Enter the text for your note.

**Step 4-** Enter a Note Reason (optional).

**Step 5-** Attach a file (optional).

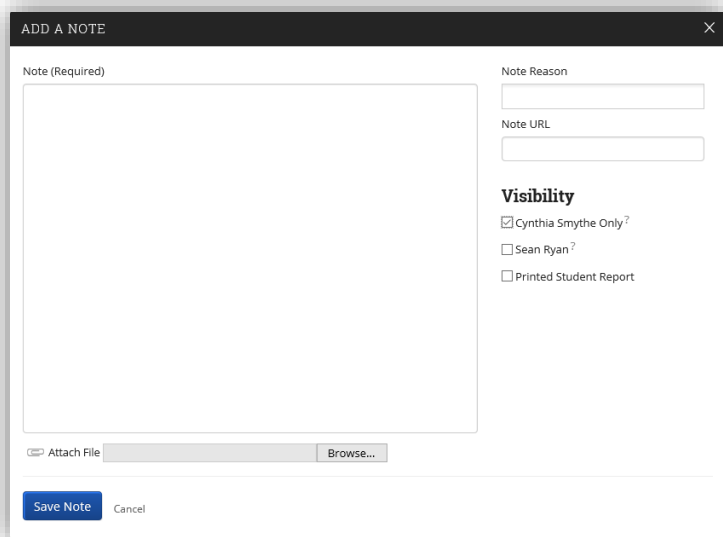
**Step 6-** Select the proper permissions and visibility settings.

Check “    advisor name     Only” if you want the note visible to only you.

Check the student's name if you want the student to be able to view the note.

Check “printed student report” to add to a progress report.

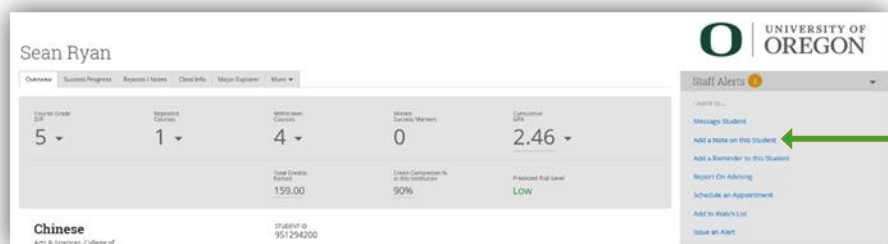
Note: If you leave all unchecked, the note will be visible by all advisors but NOT viewable by the student.



**Step 7-** Review your note and click “Save Note”.

### To Add a Note from Student Profile Page:

Select “Add a Note on this Student” and follow steps 3-7 above.



## My Calendar

Your calendar is a quick way to view appointments or events at a glance. The calendar can be accessed clicking on the calendar icon on the left side menu bar.

The screenshot shows the 'My Calendar' interface. At the top, there are tabs for 'Calendar View', 'List of Calendar Items', and 'Subscriptions'. Below this is a legend with checkboxes for 'ADVISING' (checked), 'ASSIGNMENT' (checked), 'TUTORING' (checked), 'GENERAL' (checked), 'COURSE' (checked), 'FREE BUSY' (checked), and 'CANCELLED' (checked). There are buttons for 'Add Calendar Event' and 'Print Calendar'. The main calendar view is for 'October 2015', with navigation options for 'today', 'day', 'week', and 'month'. The calendar grid shows events for the following dates:

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29 2p HIST1112-1112-1 SUR OF WORLD HIST SINCE 1500	30	1 11:30a Advising 2p HIST1112-1112-1 SUR OF WORLD HIST SINCE 1500	2	3
4	5	6 2p HIST1112-1112-1 SUR OF WORLD HIST SINCE 1500	7	8 2p HIST1112-1112-1 SUR OF WORLD HIST SINCE 1500	9	10
11	12	13 2p HIST1112-1112-1 SUR OF WORLD HIST SINCE 1500	14	15 2p HIST1112-1112-1 SUR OF WORLD HIST SINCE 1500	16 2:30p Advising	17

### Key Features

**Add Calendar Event** – Clicking Add Calendar Event will bring up your appointment scheduling page.

**Print Calendar** – Here you can print your monthly or weekly calendar views directly to PDF.

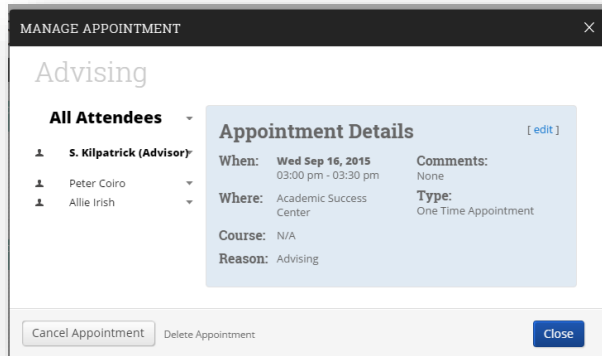
**View today, day, week or month** – Quickly choose to view just Today, or view by day, week or month. Using the left or right arrows allows you to view previous or future dates if desired.

Notice the Legend just above the calendar grid. Options listed include: **Advising, Assignment, Tutoring, General, Course, Free Busy and Cancelled**. Selecting one of the checkboxes enables associated appointments to show on the calendar grid and deselecting the checkbox hides them. (These options are automatically checked by default).

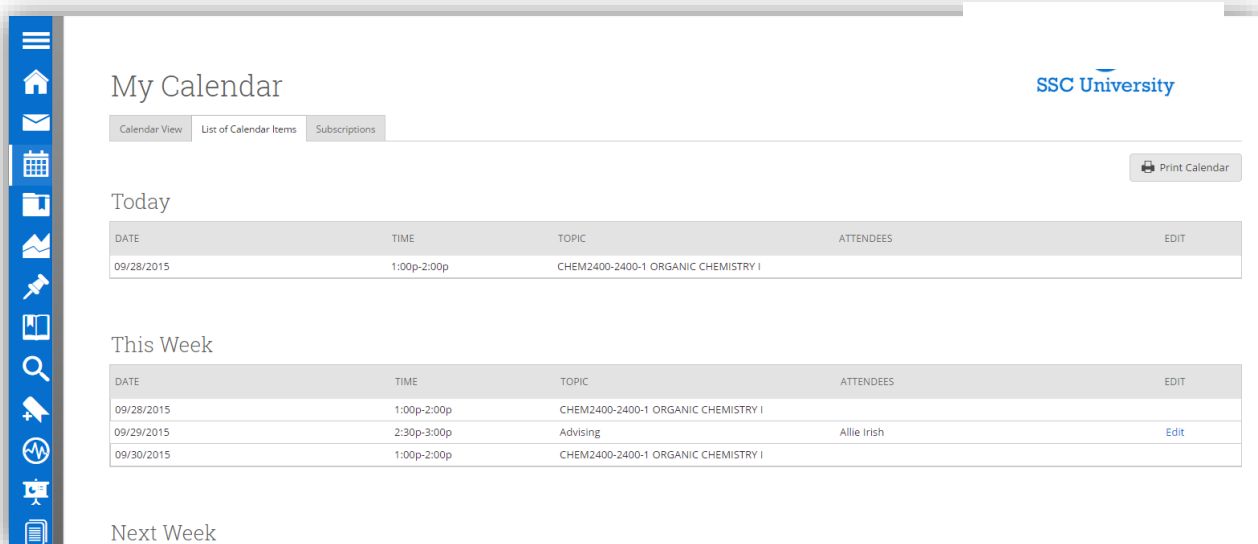


To view details of an appointment simply hover over the event on your calendar. A pop up like this one will appear.

Clicking on the event will open the Manage Appointment dialog, allowing you to edit, cancel, or delete with the appropriate permissions.



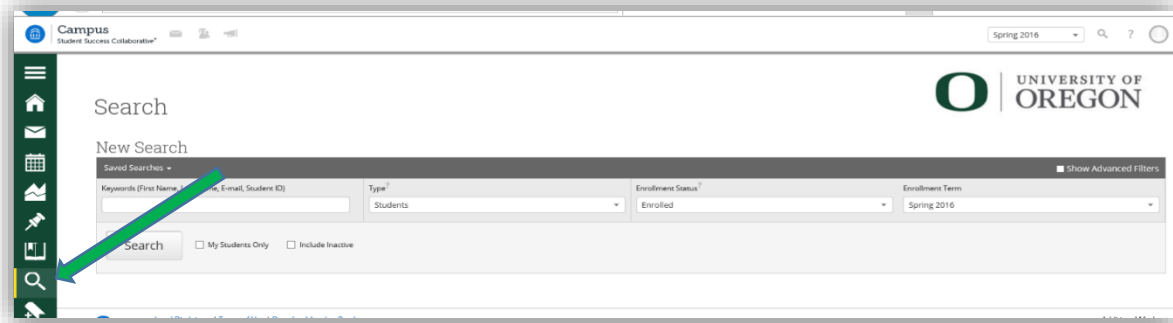
**List of Calendar Items**-The List of Calendar Items tab provides, in list form, any appointments you have on schedule for today, this week, and next week. There is also a “Print Calendar” option available for this view. If you have the permission to update specific appointments, then an “Edit” button will also be viewable.



## Searches

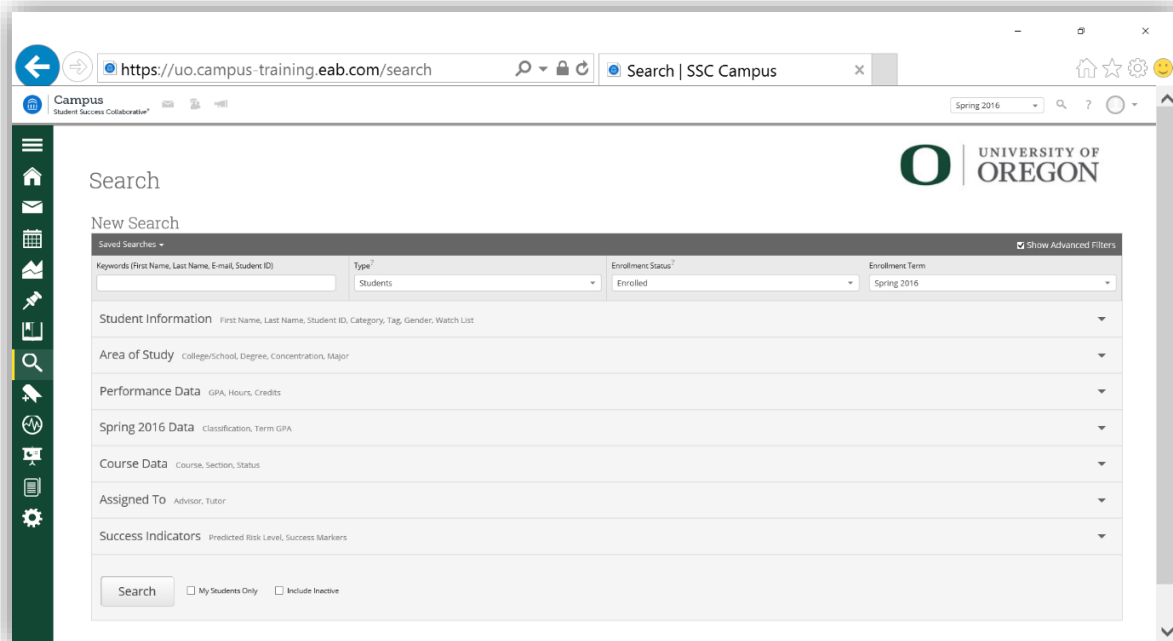
When you first click on the Search tab, SSC defaults to the Simple Search. With the simple search, you have the option to search by Keyword (Student ID). This search will only allow you to search a specific character (or group of characters in the users name), classification and/or category.

## Advanced Search



Search for a specific group of users (e.g. students, professors, advisors) and then optionally perform some action for them. For instance, it is possible to get a list of all students in the business school with less than a 3.0 cumulative GPA and send them an email.

You can toggle between the Advanced and Simple search by clicking the “Show Additional Filters” checkbox on the right side of the search box. The Advanced Search, as shown below, gives users a chance to search for a wide variety of other options such as major, amount of credits, cumulative GPA, and many more. Once you have entered your search criteria, click the Search button.



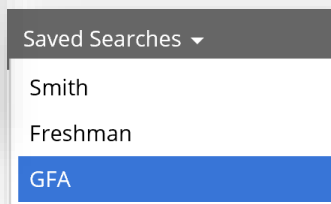
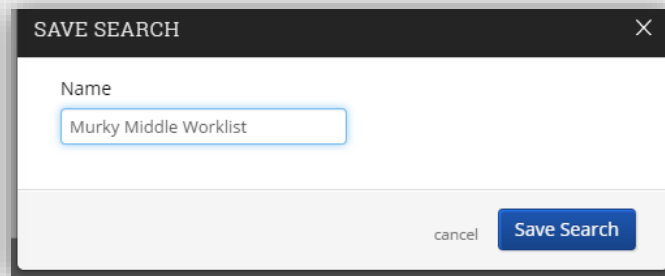
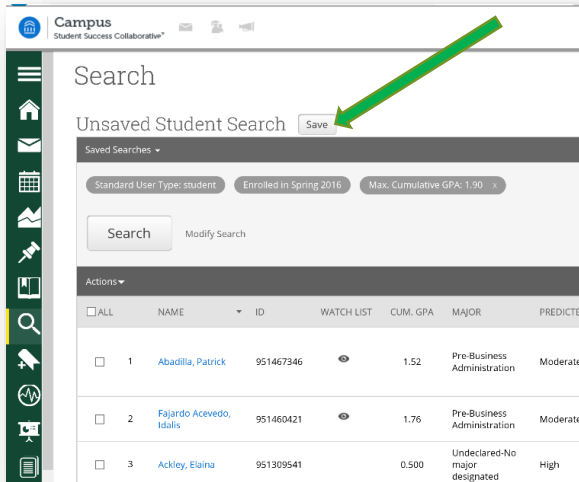
## Additional Filters

**My Students Only** - Search only students assigned to you. Advisor assignments can be direct, one-to-one assignments or indirect major or category assignments.

**Include Inactive** - By default, the search results only display users who are active in the currently selected term. Checking this box includes students from past terms as well.

## List Creation

To save a List, click the save search button in the upper left hand corner of the page and you will be prompted to save your List.

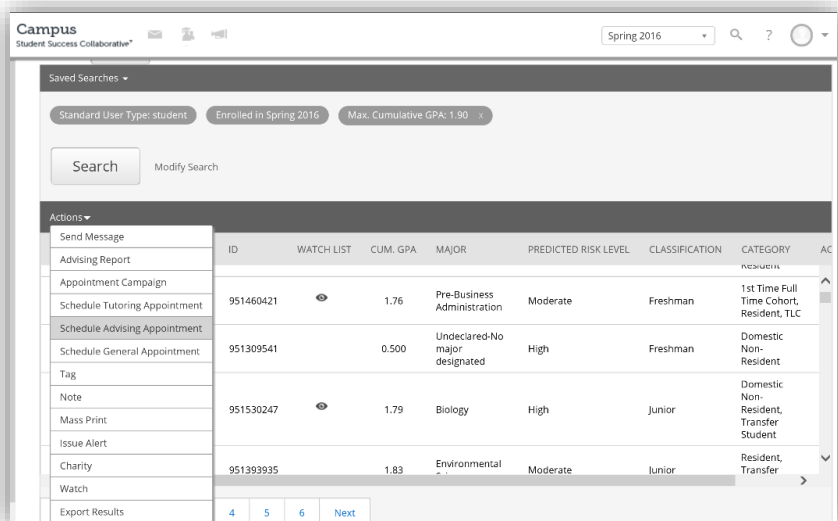


All saved Lists can be accessed through the Saved Searches drop down on the upper right hand side of the page.

## Actions Menu

When viewing your search results, the actions menu allows you to:

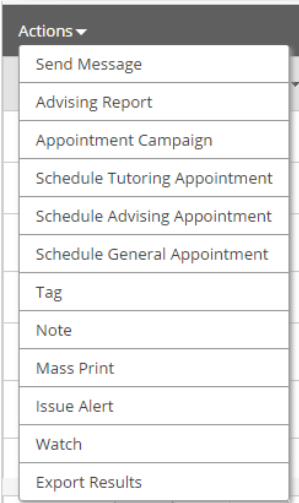
- Send a message
- Add an Advising Report
- Start an Appointment Campaign
- Schedule and Appointment
- Schedule Advising Appointment
- Schedule General Appointment
- Tag
- Note
- Mass Print
- Issue Alert
- Charity
- Watch
- Export Results



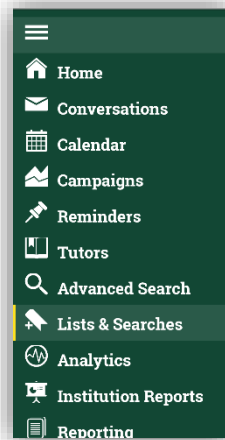
## Watch Lists

Watch Lists allow users to create static lists of students to contact for various reasons. There are several ways to create Watch Lists.

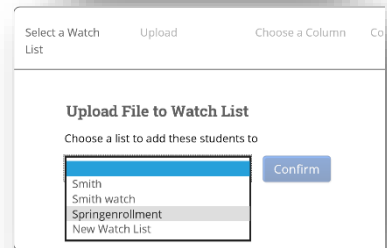
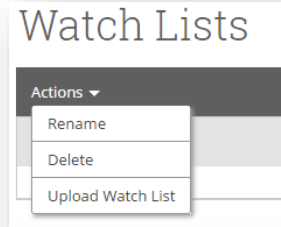
Perform a Search, select students, and then from the Actions drop-down menu in your search results, choose "Watch."



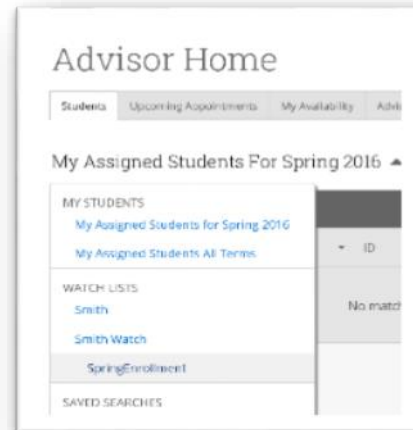
Select the Lists & Searches button found in the left menu bar.



Import a set of Student IDs using a .csv excel file.



You can find your saved watch lists on the Students tab on the Advisor Home page. Click on the up arrow next to "My Assigned Students," and a drop-down like the one pictured will appear and allow you to pull up a saved watch list or search.

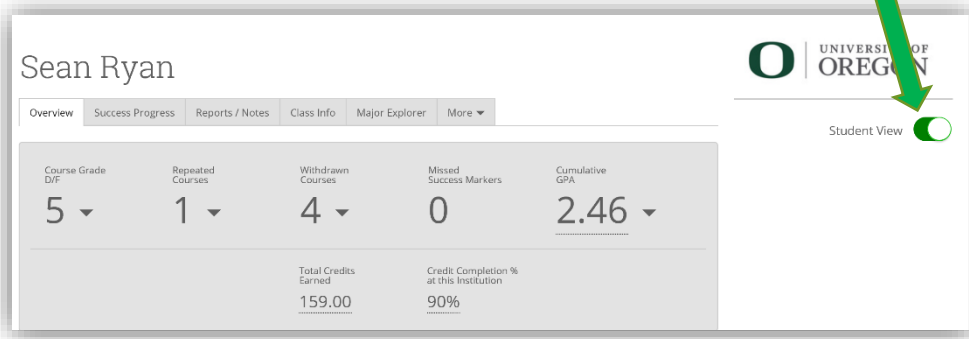


# Student Information

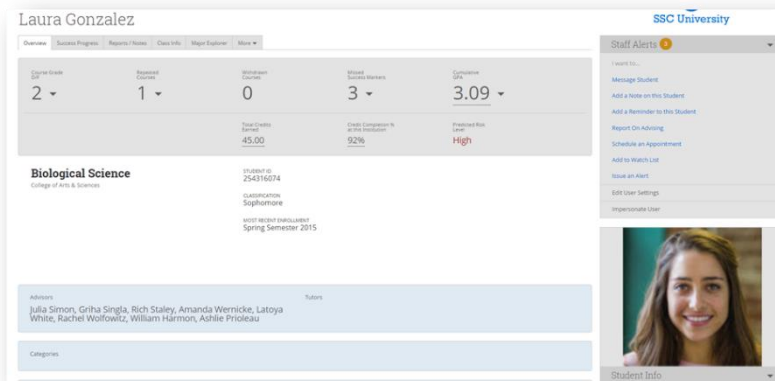
## Overview

To view a student's profile, simply click the student's name via the link anywhere in Campus. The Overview will be the first tab displayed.

Important! Change to Student View if you are viewing with a student so student does not see Risk indicator.



Student profiles are at the center of the advising application. However, to understand the importance of what the student profile can do, some background understanding is required which is covered in this overview. The student profile is a set of information about the student and their academic performance. The profile contains information centered on proactively identifying students at risk of not graduating in their major and providing the tools to support the student.



The Academic Summary shows the student's major and division, number of Ds and Fs the student has received, number of repeated courses and withdrawals, the risk indicator for the student for his or her major, and most recent term of enrollment.

Users can also see the student's major, GPA, total credits, institution completion ratio (earned credits divided by attempted credits), missed number of success markers, number of staff alerts (categories/tags), staff working with the student, and if the student has received any support on campus. By rolling over underlined information, users will get more detailed information.

## Risk

The SSC student data platform predicts individual students' likelihood to graduate in a wide range of majors on each campus. Data on historical student cohorts is collected to generate an initial series of candidate academic metrics. Advanced multivariate statistical and machine learning techniques perform variable selection and conduct hypothesis testing to highlight the most impactful trends in student data. Results are cross-validated for accuracy and compared with known research on student success outcomes. This process may be referred to as "model training."

## Success Progress

The Success Progress tab will show details about the notifications. Success Progress shows the student's academic summary as well as success markers and the student's performance against the success markers. Success markers are a course or group of required courses key to student success within a major, frequently first and second year courses, which are entered into site so that advisors can identify and intervene with students who not completing the markers. These are based on the timeframe (credit accumulation) by which students must complete the course and the recommended grade threshold that students should achieve. You can learn more about success marker details by clicking any requirement that is blue. You can also look at completed, current, or upcoming notifications by selecting the appropriate button.

The Student Progress section also shows the student's GPA trend and credit accumulation, two factors used by the predictive model to determine student risk level.

The screenshot displays the 'Success Markers' section of a student's profile. It includes a header with the title 'Success Markers' and a sub-header 'The student has missed guidelines for progress. Acting on them can help get the student back on track for successful completion.' There are three status filters: 'Completed', 'Missing' (selected), and 'Upcoming'. Below this, it indicates '3 missed markers'. A table lists the missed markers with columns for 'Notification' and 'Outcome'. A pop-up window titled 'COURSE NOTIFICATION DETAILS' is open, showing details for 'BIOL2107K', including a recommended grade of 'B-' and a list of courses: 'BIOL2107K|A PRINCIPLES OF BIOLOGY I' and 'BIOL2107K|B PRINCIPLES OF BIOLOGY I'.

Notification	Outcome
<b>BIOL2107K</b> Recommended grade: B- (1 course) Complete between 15 and 30 credits	Needs attention 1 Attempt
<b>BIOL2108K and CHEM212K</b> Recommended grade: C+ (2 courses) Complete between 30 and 45 credits	Needs attention 2 Attempts
<b>CHEM211K</b> Recommended grade: B- (1 course) Complete between 0 and 15 credits	Needs attention 2 Attempts

Users can view GPA term by term, at the University of Oregon, or overall (e.g. the combination of cumulative and transfer GPA). Likewise, users can view credit accumulation by term or cumulative credits accumulated, further broken out by credits attempted and credits completed when applicable.

The screenshot shows a table titled 'Credit Accumulation / GPA' with the following data:

TERM	CUM GPA	OVERALL GPA	CREDITS	CUM CREDITS
Fall Semester 2013	3.19	3.19	12.00	12.00
Spring Semester 2014	3.48	3.48	15.00	27.00
Summer Semester 2014	3.29	3.29	4.00	31.00
Fall Semester 2014	3.09	3.09	14.00	45.00
Spring Semester 2015	3.09	3.09	0.00	45.00

## Class Info

The Class Info tab displays the student's schedule for the current term. Alongside each course name will be a professor's name. You can click on the professor's name to view their profile. You will also see the days and times each class meets, along with final grades assigned. It's important to note that the mid-term and final grades come from Banner, not from a professor's grade submission. The Absence column is not currently functional.

### Classes This Term

Actions ▼							
<input type="checkbox"/>	CLASS NAME	PROFESSOR	DAYS/TIMES	MID	FINAL	ABSENCE	TAKE ACTION
<input type="checkbox"/>	BIOL2106-2106-1 INTRO TO THE BIOL SCIENCES	Rich Staley	MWF 12:00p-1:00p Not Specified			0 (0)	<a href="#">Course Assignments</a> <a href="#">Request Tutor Appt.</a> <a href="#">Schedule Tutor Appt.</a>
<input type="checkbox"/>	BIOL2108K-2108K-1 PRINCIPLES OF BIOLOGY II	Steven Kilpatrick Rich Staley Latoya White	MWF 8:00a-9:30a Not Specified			0 (0)	<a href="#">Course Assignments</a> <a href="#">Request Tutor Appt.</a> <a href="#">Schedule Tutor Appt.</a>
<input type="checkbox"/>	HIST1111-1111-1 SURVEY OF WORLD HIST TO 1500	Doug Hoffman Kelly Miller Seth Moucka Rachel Wolfowitz	TR 11:00a-12:15p Not Specified			0 (0)	<a href="#">Course Assignments</a> <a href="#">Request Tutor Appt.</a> <a href="#">Schedule Tutor Appt.</a>
<input type="checkbox"/>	PHYS1111K-1111K-1 INTRODUCTORY PHYSICS I	Carly Schildhaus Gina Schorr	MWF 7:00p-8:00p Not Specified			0 (0)	<a href="#">Course Assignments</a> <a href="#">Request Tutor Appt.</a> <a href="#">Schedule Tutor Appt.</a>

**Send Message to Professor-** You can check the box beside one or more professors and click the “Send Message to Professor” in the Actions drop-down menu to quickly communicate with the student’s professors.

Note: The last column of the “Classes This Term” contains several options that are not currently available (Course Assignments, Request Tutor Appt, Schedule Tutor Appointment).

## Transcript

The Transcript provides a term-by-term view of the student’s academic record, together with important metrics like term GPA and completion ratio. Pre-enrollment data will appear in the student’s first term. The amount and type of pre-enrollment data may vary depending on what is available for a particular student, but will generally include standardized test scores, high school name, and high school GPA.

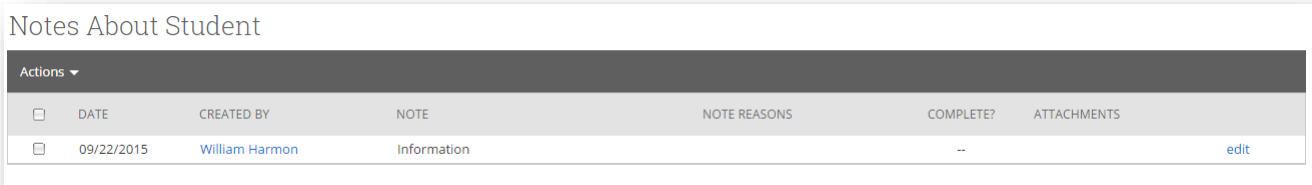
Transcript			
Spring Semester 2015 ▼			
--(2)	BIOL2106A	INTRO TO THE BIOL SCIENCES	BIOL
--(4)	BIOL2108K(B)	PRINCIPLES OF BIOLOGY II	BIOL
--(2)	HIST1111A	SURVEY OF WORLD HIST TO 1500	BIOL
--(2)	PHYS1111(B)	INTRODUCTORY PHYSICS I	BIOL
Term GPA: - Cum GPA: 3.00 Academic Standing: Good Standing			
Fall Semester 2014 ▼			
4	BIOL2107(B)	PRINCIPLES OF BIOLOGY I	C+
4	CHEM121N(B)	PRINCIPLES OF CHEMISTRY II	D
3	PHYS1101A	INTRO TO GENERAL PHYSICS I	A-
3	RELS2001A	INTRO TO WORLD RELIGIONS	A+
Term GPA: - Credit Comp %: 100% Term GPA: - Cum GPA: 3.00 Academic Standing: Good Standing			

Advisors can get more details about a course by rolling over the course title.

Fall Semester 2014 ▼	
3	BIOL3800 MOLECULAR CELL BIOLOGY B
3	BIOL3810 MOLECULAR CELL BIO LAB... B
2	CHEM3100 ORGANIC CHEMISTRY LABI B
4	CHEM3410 ORGANIC CHEMISTRY II C
CHEM3410 Grade: C Status: REGISTERED Attempted: 4 Earned: 4	
Spring Semester 2014 ▼	
3	AH1700 SL C+
3	ANTH1102 IN A

## Reports/Notes

Perhaps one of the most informational tabs on the student's profile is the Reports/Notes tab. It contains information on Alerts, Advisor Reports, Notes and visits to Student Support Centers. Note: Progress Reports, Tutor Reports and Cases will come later.



Notes About Student						
Actions ▾						
<input type="checkbox"/>	DATE	CREATED BY	NOTE	NOTE REASONS	COMPLETE?	ATTACHMENTS
<input type="checkbox"/>	09/22/2015	<a href="#">William Harmon</a>	Information		--	<a href="#">edit</a>

**Advisor Reports-** The Advisor Reports grid will list all of the advisor reports that have been filed for that student. An advisor report can be filed after an advising appointment and even when there isn't an appointment at all. Hover over the text under the "Summary" column to view the complete information of the report notes. Click "Details" to see more information about the appointment.

**Notes About Student-** All Notes that have been created for a student will be listed here. Advisors will be able to click the *Edit* link to make necessary changes to any note.

## Major Explorer

The Major Explorer uses the advising application's predictive analytics model to guide student and user decisions about major decisions. Because many users and students will be curious about how Major Explorer does this, we have included a brief explanation of how predictive modeling works in this case.

The Major Explorer uses a predictive algorithm to generate information about whether a course of study is a good fit for the student, attempting to find the majors where the student has the highest chance of graduating. To do this, the algorithm analyzes basic data from the student information system. Items like GPA and credit accumulation start to determine the degree to which a student is at risk. Additionally, student coursework is analyzed to determine the level of skill a student has demonstrated in a content domain such as the humanities, STEM courses such as biology and mathematics, business and economics, et cetera. The student's skills are matched to their current major. Risk is mitigated when their skill strengths create a high match with the skills needed to excel in the major.

Finally, Major Explorer generates a high/moderate/low risk level that estimates how likely the student is to complete the major. Red suggests that without intervention, the student will have the most challenge in completing the major. Yellow suggests the student is statistically more likely to complete these majors, but there is more challenge for the student than a major with a green indicator. Green indicates majors the student will have the least challenge completing overall.



The screenshot shows a navigation bar with tabs: Overview, Success Progress, Reports / Notes, Class Info, Major Explorer, and More. The main content area is titled 'Current Major' and displays 'Biological Science' in blue text, with 'College of Arts & Sciences' below it. To the right, 'Predicted Risk Level' is shown as 'High' in red text. Further right, under 'Related Careers', a list includes Biochemist, Biological Technician, Biologist, Biomedical Engineer, and Biostatistician.

Recommended majors are shown in order beginning with the best match according to risk. Students who are at moderate or high risk in one major may not have a low-risk match because the factors determining their risk (GPA, credit accumulation, etc.) are applicable to all majors. Major Explorer provides other options to guide a student toward a major, including filtering by majors available in a college or searching directly for a major or career. Clicking on a major name will take the user to a page that describes the major and shows careers related to the major. Additionally, users may search for majors not shown on the page for the student to investigate. The student’s current major will be listed first for comparative reasons. Major Explorer displays the risk color associated with the student’s likelihood to graduate in the major for each major on the page.

The career information is provided by Burning Glass, a leading career information provider and Student Success Collaborative partner. Users can also use the search box to search for related careers as well as majors to compare. Clicking on a related career will share more information about the career and national hiring statistics.

The 'Related Careers' section lists two careers: 'Account Executive' with the description 'Manages communications with business clients' and 'Promotes products developed specifically for a c...', and 'Account Manager / Representative' with the description 'Manages client accounts for a company. Develop marketing services or financial services such as b...'.

# Campaigns

## Setting up Appointment Campaigns

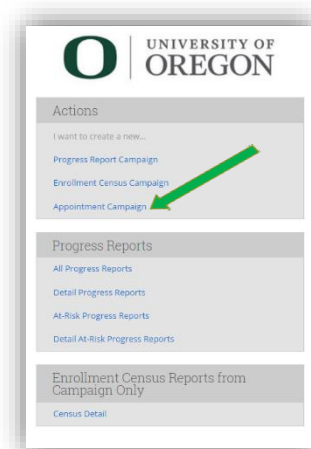
Campus Appointment Campaigns enable the advisor to request that specific students select a specific date and time in which to schedule an appointment. This feature is commonly used when an advisor must meet with all of their students at least once per term.

To begin a new appointment campaign:

**Step 1-** Click “Appointment Campaigns” in the right-hand Quick Links section

**Step 2-** On the Campaigns page select “Appointment Campaign” in the right-hand Actions Section.

**Step 3-** Fill out the “New Invitation Campaign” window.

A screenshot of the 'New Invitation Campaign' form. The form is titled 'New Invitation Campaign' and has a 'Define Campaign' section. It contains several fields: 'Campaign Name' (text input), 'Begin Date' (calendar icon, 09/28/2015), 'End Date' (calendar icon, 10/12/2015), 'Campaign Type' (dropdown menu, 'Select'), 'Appointment Length' (dropdown menu, '10 min'), 'Slots Per Time' (dropdown menu, '1'), 'Appointment Limit' (dropdown menu, '1'), 'Course or Reason' (dropdown menu), and 'Location' (dropdown menu). There are 'Cancel' and 'Continue' buttons at the bottom.

**Campaign Name-**The name of the campaign only appears to the advisor. This needs to be a name that makes sense to you.

**Campaign Type-** Select from drop-down list.

**Slots per Time-** Select how many attendees you would like to allow for every appointment time. If doing individual advising, select “1”. If leading group advising, a workshop, or tutoring session, select the number your session can accommodate.

**Course or Reason-** Select the course being addressed (if tutoring) or reason for campaign (if advising).

**Begin and End Date-** Input the date range for which you want the students to make their appointments.

**Length of the Appointment-** Select the length you would like each appointment to last for this particular campaign from the drop-down list.

**Appointments Limit-** Select the number of appointments you want a student to schedule from the drop-down list. If you only want them to meet once during the campaign select “1”, if you want them to meet more than that in the dates you define select the appropriate number of times.

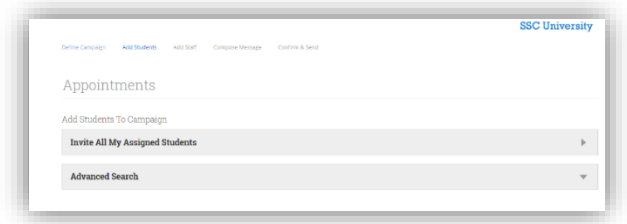
**Location-** Select the location of where the appointment(s) will be held.

**Step 4-** Review campaign details and hit “Continue” (if you want to decide on students to add later, you may hit “Save and Exit” but you campaign is not complete at this time).

**Step 5-** Select recipients of your campaign. You have several ways to search for and select your students.

**Invite All My Assigned Students-** You may select all students currently assigned to you.

**Advanced Search-** Provides advanced search filters to find, and select, students.



**Step 6-** Check the “All” box at the top of the list if you want to include all students listed OR select individuals in the list by checking the box next to their names.

**Step 7-** Review selected students and select “Continue.”

**Note:** As the next page loads a bar will tell you how many students have been added to the campaign.

**Step 8-** Double-check selected students. If you wish to remove any students, check the box by their name, click the Actions drop-down menu and select “Remove Selected Users.” If all students included are accurate, simply select “Continue.”

**Step 9-** Select yourself from the list of advisors. If multiple advisors are working on this campaign you may select other advisors as well.

**Note:** An advisor must have availability set up in order to be selected for a campaign. You should set these up in the “My Availability” section and use “Campaigns” as the appointment type.

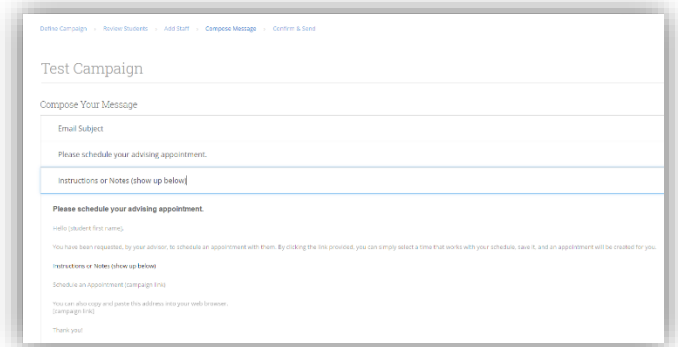
**Step 10-** Review selected advisor(s) and select “Continue.”

**Step 11-** Compose the message that you will send to students in the invitation to schedule an appointment through the campaign.

**Email Subject-** The topic will be the subject of the email going to the student.

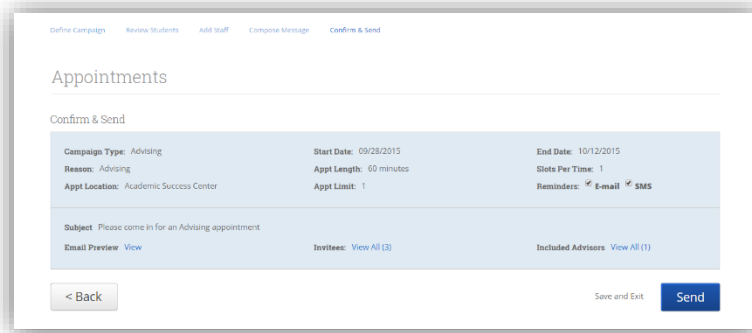
**Instructions or Notes-** This will be your message to the student.

**Note:** This screen will also give you a preview of what the invite will look like.



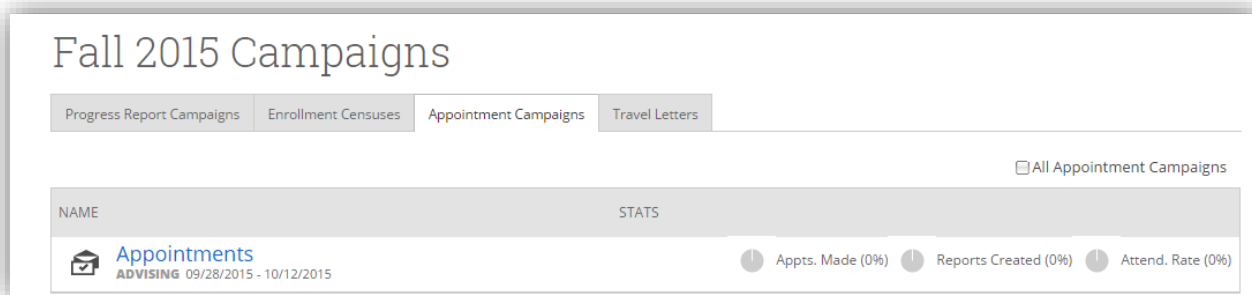
**Step 12-** Review your message and select “Continue.”

**Step 13-** Review your selected options before you start the campaign on the “Confirm & Send” page. Click Send when you are ready to email the invites to the selected students.

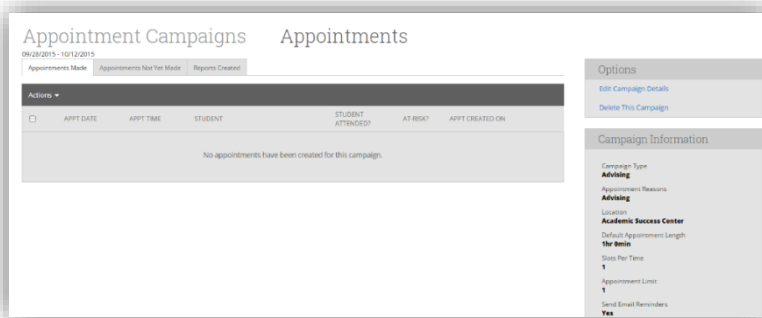


## Managing a Campaign

The site gives you several tools to help manage your Appointment Campaign after you create and send it. To find this page select the “Appointment Campaigns” tab on the Campaigns homepage.



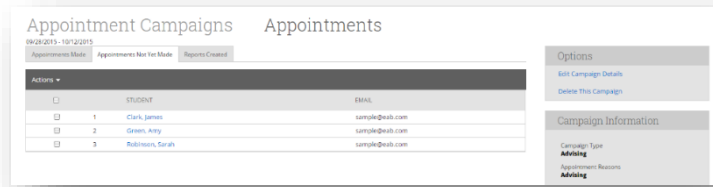
Select the campaign you wish to review by clicking on the campaign name. A new window will open that will allow you to look at specifics of that campaign.



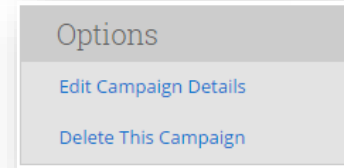
**Appointments Made-** This tab will let you see which students have made appointments. Not only can you view those students, but you can also “Send a Message” or “Add a Note” to those students by checking the box next to their name and selecting an option from the Actions drop-down menu.

**Appointments Not Yet Made-** This tab will display those students who have not yet made their appointment(s). From the Actions drop-down menu you may “Resend Appointment Request”, “Send a Message” or “Add Note” after checking the box next to the student you wish to communicate with.

**Appointment Campaign Options-** In the options box on the right-hand side of the screen you may make changes to the campaign you are viewing.



**Edit Campaign Details-** With this option, you can edit anything about the appointment campaign. When those changes have been saved, they will automatically apply to all students who still are required to make an appointment. Students who have already created their appointment(s) will not be affected by the changes.



**Delete This Campaign-** You can use this option to delete an existing campaign. However, deleting this campaign will NOT remove any student appointments that have already been scheduled.