SSC Campus Front Desk User Guide University of Oregon

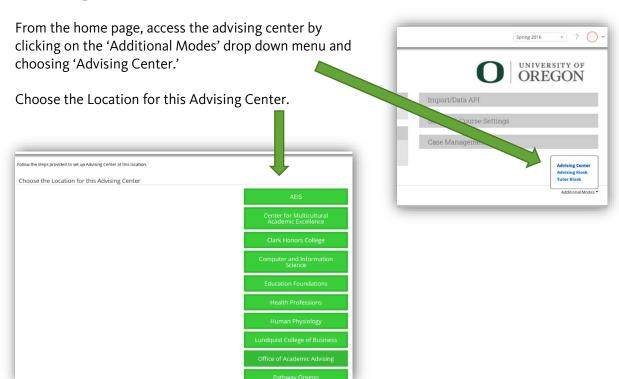


Office of Academic Advising 5/3/2016

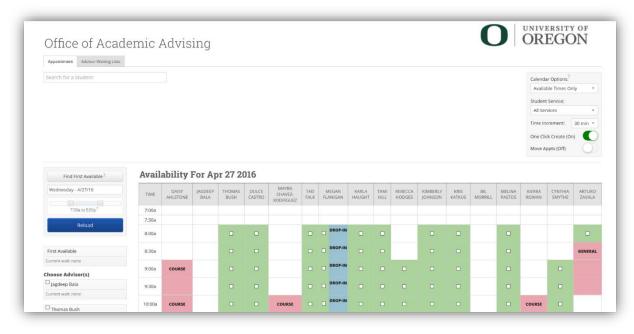
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Advising Center



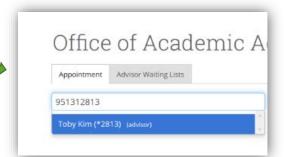
Here you can schedule, cancel and move appointments, and put students in a drop-in queue.



Appointments

Schedule an Appointment

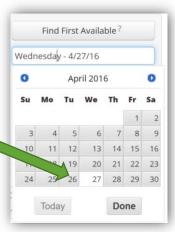
Step 1- On the Appointment tab enter the student's 95# and then select the student's name.



Use the "Find First Available?" box to find availability other than today.



Step 2- Click in the day/date box to see the pop up calendar. Choose a future day by clicking that day on the calendar.

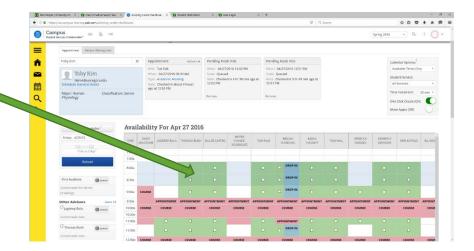


Step 3- The range of time can be narrowed on the slider bar.

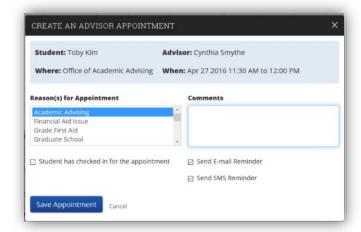
Step 4- Click the Reload button to apply these steps and view new First Availability.



Step 5- Select one of the boxes in the Availability grid to create an Advisor Appointment.



Step 6- In the Create an Advisor Appointment box, choose a reason for the appointment. Note that comments entered will be visible to student in their reminder email.



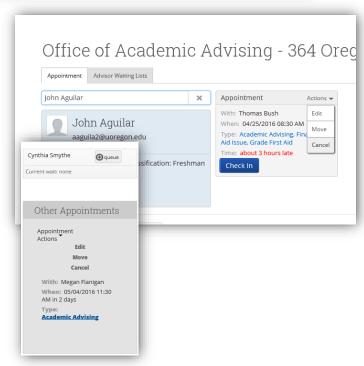
Cancel an Appointment

Step 1- Enter the student's 95# in the Search for Students box.

Step 2- Select the student's name.

Step 3- For same day appointments, click the actions drop down menu In the Appointment details box.

Future appointments will be visible in the Other Appointments box below the advisor queues.



Step 4- Select cancel.

Step 5- Cancel Appointment box – Select who the appointment is cancelled for and the reason.

Step 6- Click the Cancel Appointment button and a message will automatically sent to the attendees.

Move an Appointment

Step 1- Enter the student's 95# in the Search for Students box.

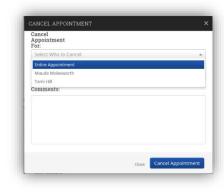
Step 2- Select the student's name.

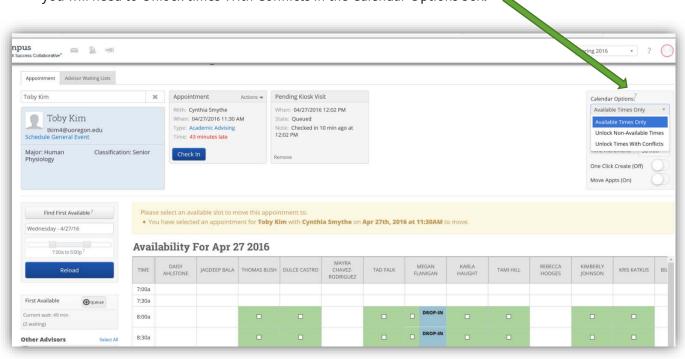
Step 3- In the Appointment details box, click the Actions drop down arrow.

Step 4- Select Move.

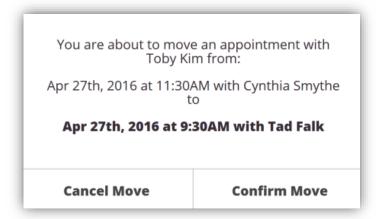
Step 5- Select an available slot to move appointment to.

Step 6- If you are moving an appointment to another advisor but keeping the same appointment time, you will need to Unlock times With Conflicts in the Calendar Options box.



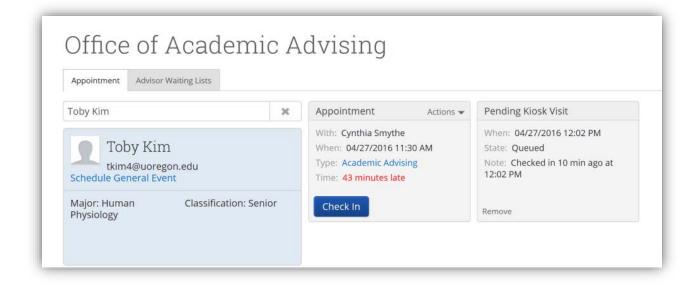


Step 7- Confirm move.



Check in for an Appointment

To check a student in for an appointment, enter the student's 95# in the appointment tab and click the Check In button in the Appointment Box.



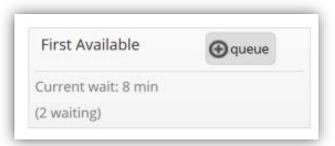
Check in for Drop-In Advising

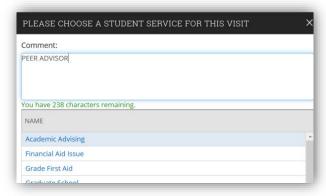
Step 1- Enter the student's 95# in the Search for Students box and click the student's name.

Step 2- Click the queue button in the First Available box.

Step 3- Student Service box. Select a student service for the visit. If the student is coming for Peer Advising, type Peer Advising in the comment box **before** selecting the student service.

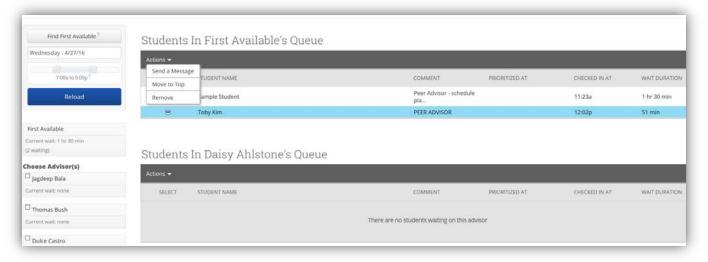
Step 4- If a student requests a specific advisor, find that advisors queue in the Other Advisors section below the First Available box.





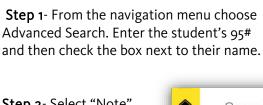
Advisor Waiting Lists

This is where you can monitor the queues. The Actions drop-down menu in any queue will allow you to send a message to a student, move them to the top of the queue or remove them from the queue.

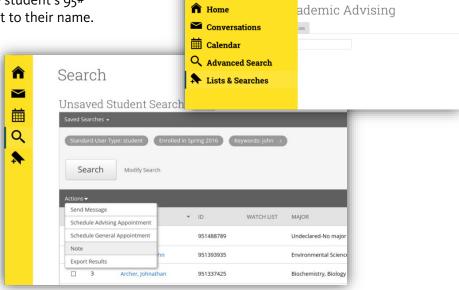


Notes

Notes can be used to attach documents to a student's record and keep track of information about that student, such as education plan.

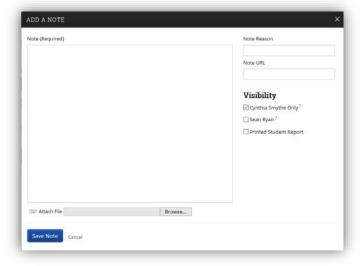


Step 2- Select "Note" from the Actions drop-down menu.



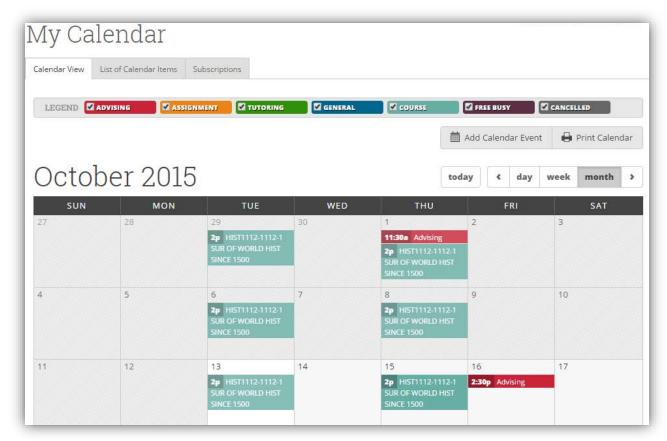
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- **Step 3** Enter the text for your note.
- Step 4- Enter a Note Reason (required).
- Step 5- Attach a file (optional).
- **Step 6-** Select the proper permissions and visibility settings.
- **Step 7-** Review your note and click "Save Note."



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.



Key Features

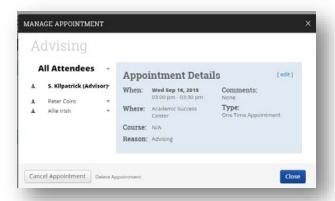
Add Calendar Event – Clicking Add Calendar Event will bring up your appointment scheduling page.

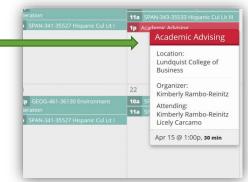
Print Calendar – Here you can send your monthly or weekly calendar views directly to PDF.

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. 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 box, allowing you to edit, cancel, or delete with the appointment.

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.

Appointments with 'Edit' next to them can be edited by you.

