Coordinated Services Enhancement Release
June 2017

Thanks for checking in to see what’s new in this EAB release. Here is a summary:

**Scheduling**
- Ability to Associate Appointment with Campaign
- 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
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
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
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.

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### 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 Fall 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

<table>
<thead>
<tr>
<th>Appointment Center Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Advising Center - Lecture Hall</td>
</tr>
<tr>
<td>Academic Success Center</td>
</tr>
<tr>
<td>Academic Success Center CL</td>
</tr>
<tr>
<td>Academic Success Coaching</td>
</tr>
<tr>
<td>Athletics Complex</td>
</tr>
<tr>
<td>Business Advising Center</td>
</tr>
<tr>
<td>Campus Recreation Center</td>
</tr>
<tr>
<td>College of Sciences Advising</td>
</tr>
<tr>
<td>Career Services</td>
</tr>
<tr>
<td>Financial Aid Office</td>
</tr>
<tr>
<td>IUB - ASC Facilities</td>
</tr>
<tr>
<td>IUB - University Division</td>
</tr>
<tr>
<td>Library</td>
</tr>
<tr>
<td>Library Tutoring Center, 3rd Floor</td>
</tr>
<tr>
<td>Test 1</td>
</tr>
<tr>
<td>Tutor Drop In</td>
</tr>
</tbody>
</table>
Appointment Center User Interface

Before:

Appointment Schedule

After:
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.
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
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.
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.
The best practices are the ones that work for you.