SARS Anywhere

SCHEDULING AND REPORTING SYSTEM

USER MANUAL

SARS ANYWHERE USER MANUAL

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SECTION 1   INTRODUCTION

1.0   Overview

This manual is intended for use by schedulers, advisors and counselors. The day-to-day operations for end users are performed from the web.

This section contains the information needed to open and close the application, and work with passwords. Each user will need both a user name and a password. The System Administrator will provide you with a user name and an initial password. You can then change your password by following the steps in "Change a Password" at Section 1.3.

1.1   Log in to SARS Anywhere

1. Log in to SARS Anywhere via the college's public website (to be provided by college). The following log-in screen will be displayed:
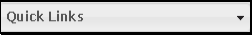
Note If the user has access to more than one database, a selection screen will first be displayed from which the user may select the desired database. After that selection, the Log-in screen will be displayed.

2. Type in your User Name.

3. Tab to the Password field and type your Password.

4. Click **Login**. Unsuccessful logins will display one of the following error codes:

Login Error Code	Explanation
20	General error, possibly due to inability to access data service or database, or configuration issue with data service.
21	User account does not have permission to access at least one of the following access codes: THE GRID – Access All Schedules, MY GRID – Access (as well as a Short Name), Drop-ins – Access, and at least one Reports permission.
22	Invalid User Name and/or Password.
23	User logon is outside the parameters set for the time and day. (See "Restrict Access" under User Name Maintenance in the SARS Anywhere Administration Manual.)

After a successful login, the SARS Anywhere application will be displayed. This is an example of tool bar, which provides access to various scheduling and configuration functions.   Hovering the cursor over each icon will display a tool tip describing the function.

Tool Bar		
Option	**Symbol**	**Description**
Flyover Menu	[Name>Location>Day>Date]	Use to specify the Location, advisor(s), specialty, and date(s) for which schedules will be displayed.
Quick Links		Use to display the Quick Links menu, from which many actions may be performed (other than scheduling or canceling an appointment).
Refresh		Use to refresh the screen display at any time. Otherwise, the screen refreshes at the default rate (30 seconds) or the rate configured by the user. (See "Configure Miscellaneous Settings" at Section 4.4.)
Print		Use to print any reports from screens that are displayed as a Tab. These include the Daily Report, the Snapshot Report, the Drop-in Report, the Student History Report, and Notes.
Chat Availability		Use to configure the user's individual Chat availability options.
Configuration		Use to establish Tabs, MY GRID columns, SARS·Chat settings, Miscellaneous settings, Export settings, Drop-in screen settings, and Global Configuration settings.
Help		Use to gain access to the help files.
User		Use to enter the user's account information, change a password, and logout of the application.

1.2   Enter Account Information

If you have forgotten your password, the system will use your Full Name, along with your email address and telephone number to send you a code for resetting the password. To ensure that the system has your correct information, use the Account Information option.

1.   Navigate to the **User** icon located on the tool bar, as shown below.
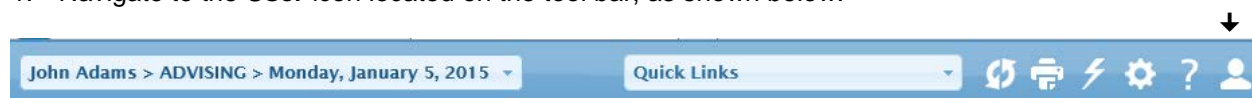
2.   Click the **User** icon to display the following menu.

John Adams

Account Information

Change Password

Logout

Option	Description
[User Name]	Displays the User Name of the person who is signed in.
Account Information	Use to display an Account Information screen to add the user's text phone and email address, which may be used if the user's password is forgotten or needs to be changed.
Change Password	Use to change the user's own password.
Logout	Use to exit SARS Anywhere.

3. Click **Account Information** to display the following screen:

Account Information   [?] [✖]

Text Phone

(___) ___-____   ✖

Email Address

Save   Cancel

4. Click the **Text Phone** field and enter your text phone number.

5. Click the **Email Address** field and enter your email address.

6. Click **Save**. The information provided in these two fields will be used by the system to provide options to reset a password.

1.3   Change a Password

Only a user who has been granted **SARS Admin – Access and User Name Maintenance** access rights can assign a password. After a password is initially assigned, either the System Administrator or the user may change the password. The following instructions are for users who may wish to change their passwords themselves. Passwords must conform to college requirements.

1. Navigate to the **User** icon located on the tool bar, as shown below.

John Adams > ADVISING > Monday, January 5, 2015 ▾   Quick Links   ▾   ⏏ 🖶 ⚡ ⚙ ? 👤
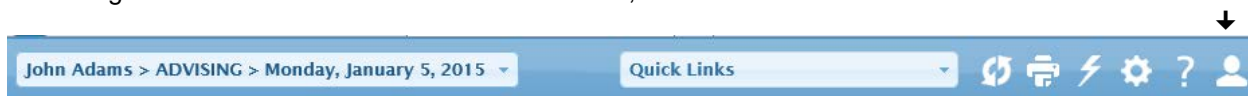
2. Click the **User** icon.

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3. Click **Change Password** to display the following screen.

4. Click in the **Current Password** field and type in your existing password.

5. Click in the **New Password** field and type in your new password.

6. Click in the **Confirm New Password** field and re-type your new password in order to validate the spelling.

7. Click **Save**.

1.4   Logout of SARS Anywhere

1. Navigate to the **User** icon located on the tool bar, as shown below.

2. Click the **User** icon.

3. Select **Logout**. You will be returned to the Log In screen.

SECTION 2   THE GRID

2.0   Overview of THE GRID

THE GRID is used to perform scheduling functions. It is a matrix of cells that displays scheduling data. .
Each cell represents a date and time of day for an individual advisor. When a single date is selected for a
group of advisors, each column represents the daily schedule for the advisor named at the top of the
column. When a single advisor is selected, multiple dates are displayed, with each column representing
a calendar date.

 Here is an example of THE GRID showing all advisors for the Advising Department for a single date.

Here is an example of THE GRID displaying one advisor's schedule for the Advising Department for a series of calendar dates.

2.1   Navigate THE GRID

The feature that allows the users to specify which Location, date, advisor(s) and specialty to display is located on the tool bar after logging in to SARS Anywhere.

1.   If needed, click on the tab labeled **THE GRID**. The focus will be placed on the first column, which will display the first advisor for the Location, or the first date if THE GRID is being used by a single advisor to work with multiple dates.

2.   Note the Flyout menu [**Full Name > Location > Day > Date ▼**]. The Full Name of the advisor for the column that is active will be displayed in the Flyout Menu. To make any changes, touch or click on the Flyout menu to display a selection screen.

Here is an example when all advisors are shown on THE GRID:

Here is an example for a single advisor from THE GRID:

[**Name > Location > Day > Date ▼**].		
Option		**Description**
Location		Use to select the work unit or department for which schedules will be displayed on THE GRID.
Date		Use to select a single date for the multiple advisors mode and to select multiple dates for the single advisor mode to be displayed on THE GRID.
	◄[Prev]	Use to display the previous month.
	[Month]	Use to display a list of months for selection.
	[Year]	Use to display a list of years for selection.
	►[Next]	Use to display the next month.

[**Name > Location > Day > Date ▼**].		
Option		**Description**
	Today	Use to display today's date.
Short Name	All	[Available if the user has permission to Access All Schedules] Use to display all advisors for the selected location for a single date. This option may be further refined by grouping advisors by specialty.
	[Name]	[Available if the user has permission to Access All Schedules] Use to select one advisor for whom multiple dates will be displayed.
Specialty		[Available if the user has permission to Access All Schedules] Use, in connection with **Short Name – All**, to display only those advisors with the selected specialized subject matter or skill in order to schedule students with an individual who can best meet their needs. For example, some advisors may have specialized knowledge pertinent to veterans; others may have knowledge that is pertinent to athletes or international students.

    a.   If needed, click **Location ▼** and select the Location in which the appointment is to be scheduled.

    b.   In the <u>Date</u> panel, note that a date picker offers the opportunity to navigate to a selected month and year, to click on a specific date on the calendar, or to select today by clicking on **Today.**

    c.   If the user has permission to Access All Schedules, the **Short Name** field defaults to ALL. If needed, click **Short Name ▼** and select the advisor whose schedule is to be displayed on THE GRID for a series of calendar dates. If the user has access only to his/her own schedule, the field will display only that user's Short Name.

    d.   [If the user has permission to "Access All Schedules"] Click **Specialty ▼** and select the desired specialty in order to refine the list to only those advisors who are associated with that specialty, or leave the option at **ALL** to include all advisors.

    e.   Move the cursor away from the selection panel to return to THE GRID.

Tip
To find adjacent dates that are not currently displayed, use **Next >>** or **<< Previous** at the bottom of THE GRID. In multiple advisor mode, **Next >>** will advance to the next date and **<< Previous** will display the previous date. In single advisor mode, **Next >>** will advance to the next set of dates and **<< Previous** will display the previous set of dates.

3.   To establish a Background Theme, Refresh Interval, and Flyouts on Mouseover option for THE GRID, click the **Configuration** icon on the top bar of the screen and select **Miscellaneous**. Proceed to make the desired selections. (See "Configure Miscellaneous Settings" at Section 4.4 for step-by-step instructions.)

4.   To perform a scheduling action, double-click on the desired appointment available time slot to display the *Student Appointment Screen*. Proceed to book the appointment. (See "Scheduling Functions" at Section 6 for step-by-step instructions.)

Note
If a locked padlock icon is displayed in the header of a column, it means that the column has been locked and cannot be used for scheduling. See "Lock or Unlock a Column" at Section 13.4.

SECTION 3   MY GRID

3.0   Overview of MY GRID

MY GRID is used by advisors to view or print their schedule for a selected date. MY GRID displays an individual advisor's activities, by time, for a single date. If the activity is a booked appointment, the student's name and ID, as well as reasons for the appointment, will be displayed. To view multiple dates of a single advisor's schedule, use THE GRID (see Section 2).

The following features are discussed in this section:

>   3.1   Navigate MY GRID

>   3.2   View and Print a Schedule

MY GRID has the capability of displaying a variety of columns. Here is an example, although which columns to display, as well as the display order of the columns, (other than Time), may be customized as desired using the *MY GRID Columns Configuration* screen described in Section 4.2. Here is an example of MY GRID showing some, but not all, of the possible status columns.

MY GRID		
Column Option	**Symbol**	**Description**
Time		Used to display the time slots for the advisor's schedule. This column is fixed.
Schedule Code		Used to display the Schedule Code for each time slot. The heading for the column is "Code."
Notes		Used to indicate that one or more Notes exist for the student booked in the time slot. Clicking on the icon in this column will display the Notepad containing the notes about the student.
Alerts		Used to indicate that one or more Alerts exist for the student booked in the time slot. Clicking on the icon in this column will display any Alert(s) for the student.
Additional Information		Used to indicate that Additional Information is available about the student booked in the time slot. Clicking on the icon in this column will display the Additional Information screen for the student.
eAdvising		Use to view a list of unanswered and answered eAdvising questions sent by the student in the booked appointment time slot. Clicking on the icon in this column will display the eAdvising questions and answers from the student. [Also available as a tab, where the user may view all unanswered questions from all students in the Location.]
Send Email		Used to indicate that the student in the booked appointment time slot has an email address on file and that email is a student contact option. Clicking on the icon will display the Send Email dialogue screen, which can be used to compose a message to the student.
Send Text Message	TXT	Used to indicate that the student booked in the time slot has a text phone on file and that text messaging is a student contact option. Clicking on the icon will display the Send Text Message screen, which can be used to compose a message to the student.
Student ID		Used to display the student identifier for a student booked in a time slot.
Student Name		Used to display the name of the student booked in time slot.
Reason Code(s)		Used to display the reason(s) for the appointment or activity.
Comments		Used to display any comments that are associated with the appointment or time slot.
Description		Used to display a more complete description of the Schedule Code.

3.1   Navigate MY GRID

The feature that allows the users to specify which date, advisor(s) and specialty to display is located on the tool bar after logging in to SARS Anywhere from the web.

↓

| John Adams > ADVISING > Monday, January 5, 2015 ▾ | Quick Links | ▾ | ⏻ 🖨 ⚡ ⚙ ? 👤 |

When the focus is on the tab labeled **MY GRID,** your schedule for today will be displayed.

1.   Note the Flyout menu [**Name > Location > Day > Date▼**]. To make any changes, touch or click on the Flyout menu to display a selection screen. Here is an example:

Location
ADVISING   ▾

Date

| ◀ | Jan ▾ | 2015 ▾ | ▶ |

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
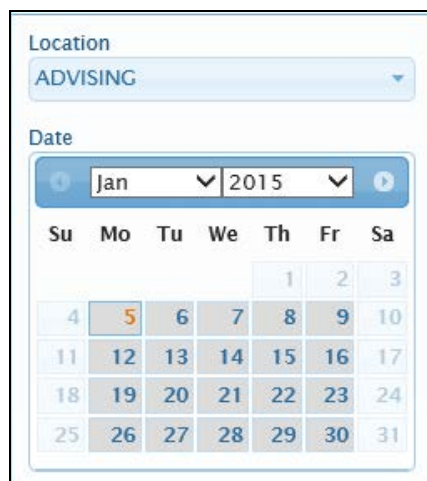
[**Location > Date▼**]	
Option	**Description**
Location	Use to select the work unit or department for which the advisor's schedule will be displayed.
Date ◀ [Prev]	Use to select the previous month.
[Month]	Use to display a list of months for selection.
[Year]	Use to display a list of years for selection.
▶ [Next]	Use to select the next month.

a.   If needed, click **Location ▼** and select the Location in which the schedule is to be viewed or worked with.

b.   In the Date panel, note that a date picker offers the opportunity to navigate to a selected month and year, to click on a specific date on the calendar, or to select today by clicking on **Today.**

c.   Move the cursor away from the selection panel to return to MY GRID.

2.   To configure the columns to be displayed on MY GRID, click the **Configuration** icon on the tool bar and select **MY GRID Columns.** Proceed to select, de-select, and/or re-order the column options. (See Section 4.2 for step-by-step instructions.)

3. To establish a Background Theme, Refresh Interval, and Flyouts on Mouseover option for MY GRID, click the **Configuration** icon on the tool bar and select **Miscellaneous.** Proceed to make the desired selections. (See Section 4.4 for step-by-step instructions.)

4. To perform a scheduling action, double-click on the desired appointment available time slot to display the *Student Appointment Screen*. Proceed to book the appointment. (See Section 6 for step-by-step instructions.)

5. To view multiple dates at the same time for a given advisor, use THE GRID. (See Section 2.1 for step-by-step instructions.)

3.2   View, Print and Save a Schedule

Two reports are available from MY GRID by clicking on the **Printer** icon on the toolbar, as shown below:
↓

The *Daily Report* displays an individual's schedule for a single day and provides options to suppress ID, hide extended time slots, and/or exclude the Default Master Schedule Code. In *Portrait* mode, it displays each scheduled activity by time, and, if the activity is an appointment, the student's name, ID and telephone number, as well as the reason(s) for the appointment. In *Landscape* mode, the report also displays any comments about the activities. Here is an example of the criteria screen for the *Daily Report*.

The *Snapshot Report* displays multiple days per page of an individual's schedule. The report displays in column format the date and day of the week, the time of each scheduled activity, and the schedule code.

Here is an example of the criteria screen for the *Snapshot Report*.

MY GRID Reports		
Option		**Description**
Report	Daily Report	Use to select the Daily Report.
	Snapshot Report	Use to select the Snapshot Report.
Orientation [Daily Report]	Portrait	Use to print each activity by time. It includes all information that is displayed in Landscape, except for Comments. The information is displayed vertically on a page.
	Landscape	[This is the default mode for the Daily Report] Use to print each activity by time. If the activity is an appointment, this orientation shows the student's name, ID, and telephone number, as well as the reason(s) for the appointment. It also prints any comments about each activity. The information is displayed horizontally on a page.
Orientation [Snapshot Report]	Portrait	Use to print the report vertically, which will display in column format up to eight dates per page of an individual's schedule.
	Landscape	Use to print the report horizontally, which will display more dates than the portrait mode.
Report Criteria [Daily Report]	From Date	Use to select the first date of a date range to be displayed on the report.
	To Date	Use to select the last date of a date range to be displayed on the report.
	Exclude Default Code	Use to shorten the report by eliminating time slots that contain the Default Master Schedule Code, which is displayed in any time slot for which no other Schedule Code has been entered (e.g., ….).
	Hide Extended Cells	Use to display only the starting time of each activity. This option will reduce the length of the report to be printed when a schedule contains extended appointments or extended activities.
	Suppress ID	Use to prevent the report from printing the student's identifier.

MY GRID Reports		
Option		**Description**
Report Criteria [Snapshot Report]	From Date	Use to select the first date of a date range to be displayed on the report.
	To Date	Use to select the last date of a date range to be displayed on the report.
	Blank Snapshot	Use to generate a blank copy of THE GRID, showing columns which can be used for days of the week, with time slots in the left-hand column. The purpose of this report is to provide a blank schedule for an advisor to handwrite and submit a recurring schedule.
View		Use to view the report prior to, or in lieu of, printing.
Save		Use to save the report to a file.

3.2.1   Set-Up the Daily Report

1.   From MY GRID, navigate to the desired date.

2.   Click the **Printer** icon on the tool bar of the screen to display the following criteria screen.

3.   Click **Daily Report**.

4.   Select the orientation (either **Portrait** or **Landscape**).

> **Notes**
> The Landscape Orientation, which is the default, prints each activity by time. If the activity is an appointment, this orientation shows the student's name, ID, and telephone number, as well as the reason(s) for the appointment. It also prints any comments about each activity. The information is displayed horizontally on a page.
>
> The Portrait Orientation prints each activity by time. It includes all information that is displayed in the Landscape Orientation, except for Comments. The information is displayed vertically on a page

5,   Click **From Date** and type in the first date to be covered by the report, or use the Date Picker. (See Appendix B)

6.   Click **To Date** and type in the last date to be covered by the report, or use the Date Picker.

7.   If desired, click **Exclude Default Code**. This option shortens the report by eliminating the time slots in which no other Schedule Code has been inserted.

> **Note**
> The **Exclude Default Code** option is useful when time increments are set for less than 30 minutes, which may cause the report to extend beyond a single page.

8.   If desired, click **Hide Extended Cells** to display only the starting time of each activity.

9.   If desired, click **Suppress ID**.

10. Click **View** to view the report prior to, or in lieu of, printing.

-or-

Click **Save** to save the report to a file.

Note
The available options for viewing and saving are dependent on your web browser and/or your PDF viewer. Paper copies can be printed from the viewing screen.

3.2.2   Set-Up the Snapshot Report

1.   From MY GRID, navigate to the desired date.

2.   Click the **Printer** icon on the tool bar of the screen to display the following criteria screen.

3.   Click **Snapshot Report**.

4.   Select the orientation (either **Portrait** or **Landscape**).

5,   Click **From Date** and type in the first date to be covered by the report, or use the Date Picker. (See Appendix B)

6.   Click **To Date** and type in the last date to be covered by the report, or use the Date Picker.

7.   Click **Blank Snapshot** if you wish to generate a blank copy to use as a worksheet.

8.   Click **View** to view the report prior to, or in lieu of, printing.

-or-

Click **Save** to save the report to a file.

Note
The available options for viewing and saving are dependent on your web browser and/or your PDF viewer. Paper copies can be printed from the viewing screen.

SECTION 4   CONFIGURATION OPTIONS

4.0   Overview

The Configuration Screen is available to individualize the appearance and functionality of a user's SARS Anywhere experience. It is accessed by clicking on the Configuration (gear) icon located on the tool bar after logging in to SARS Anywhere from the web.

The following configuration options are discussed in this section:

>   4.1   Configure Tabs
>
>   4.2   Configure My GRID Columns
>
>   4.3   Configure SARS·Chat
>
>   4.4   Configure Miscellaneous Settings
>
>   4.5   Configure Export Settings
>
>   4.6   View and Configure Drop-in Settings

4.1   Configure Tabs

The Tabs configuration option may be used to select or de-select certain functions to be displayed as tabs in SARS Anywhere in order to provide more direct access to those functions. Users may also use this screen to change the order in which the selected Tabs are displayed. Only those functions to which the user has access rights will be displayed.

To exit a function that is established as a Tab, simply click on a different tab.

1.   Click the **Configuration** icon.

2.   Click **Tabs**. The screen shows all available tabs in two panels: <u>Selected Tabs</u> (tabs in use) and <u>Available Tabs</u> (tabs available for selection). Users will see only those functions for which they have been granted access. Aside from THE GRID, MY GRID, and Drop-in, which are embedded, other tab functions are available from the Quick Links option (see "The Quick Links Menu" at Section 5.)

     Here is an example of all available tab options:

Tab Configuration	
Option	**Description**
Selected Tabs	Use to display a list of tabs that are already in use in SARS Anywhere for the user.
Available Tabs	Use to display a list of tabs that are not in use in SARS Anywhere.
THE GRID	Use to display a user's own schedule for multiple dates or schedules for all advisors in the selected Location. The tab is embedded and locked in place.
MY GRID	Use to display a user's own schedule for a single date. The tab is embedded and locked in place.
Drop-in	Use to display the Drop-in screen. The tab is embedded and locked in place. (See "Drop-ins" at Section 7.)
Additional Information	Use to add a tab for easy access to the Additional Information screen, from which users may view and, if permitted, record or change responses about a student. (See "Additional Information" at Section 9.)

Tab Configuration	
Option	**Description**
Alerts	Use to add a tab for easy access to the Alerts screen, from which users may view or enter a message that is viewable by advisors or by schedulers who have access to this Location. Student alerts will also be viewable by students when making their own appointments via eSARS. (See "Alerts" at Section 10.)
Contacts	Use to add a tab for easy access to the Contacts screen, from which users may keep a count of the number of informal student contacts made each day in addition to appointments and drop-in visits. (See "Contacts" at Section 12.)
eAdvising	Use to add a tab for easy access to the eAdvising screen, from which users may view a list of unanswered eAdvising questions sent by any student and to reply to or delete a question. (See "eAdvising" at Section 17.)
Master Schedules	Use to add a tab for easy access to the Master Schedules screen, from which users may create and add a user's master schedule. (See "Master Schedules" at Section 15).
Notepad	Use to add a tab for easy access to the Notepad, from which authorized users may view, print, write, and, in some cases, delete and change the security status of notes about students. (See "The Notepad" at Section 16.)
Quick Day Change	Use to add a tab for easy access to the Quick Day Change screen, from which users may change an advisor's schedule after it has been added to THE GRID and MY GRID. (See "Change Schedules" at Section 13.)
Recurring Activities	Use to add a tab for easy access to the Recurring Activities screen, from which users may schedule a regularly recurring appointment or meeting for a single advisor using a variety of criteria (location, date range, time range, duration, frequency, etc.). (See "Make Recurring Appointments" at Section 6.15.)
Reports	Use to add a tab for easy access to the Reports screen, from which users may view and print reports. (See the SARS Anywhere Reports Manual.)
Search for Appointment	Use to add a tab for easy access to the Search for Appointment screen, from which users may find an appointment slot using a variety of criteria (e.g., advisor, specialty, date range, day of week, time range). (See "Search for an Available Appointment Slot" at Section 6.4.)
Student History	Use to add a tab for easy access to the Student History screen, from which users may view all appointment and drop-in history for the selected student, as well as a history of all answered eAdvising questions. (See "The Student History Screen" at Section 8.)
Student Maintenance	Use to add a tab for easy access to the Student Maintenance screen, from which users may add a student, change information about a student, merge IDs, or delete a student in a case where no appointment activity has yet been recorded. (See "Student Maintenance" at Section 19.)
OK	Use to save entries and exit the screen.
Cancel	Use to exit the screen without saving.

3. To include a tab that is listed in <u>Available Tabs</u> panel, click on the tab label and then drag and drop it within the <u>Selected Tabs</u> panel. Repeat this action as desired for other tabs to be added.

4. To remove a tab that is listed in the <u>Selected Tabs</u> panel, click on the tab label and then drag and drop it within the <u>Available Tabs</u> panel. Repeat this action as desired for other tabs to be removed from the display.

5. To rearrange the order of the tabs, click on the tab label to be moved and drag it up or down until it is in the desired location relative to the other items on the list. Then drop it in place.

6. When done, click **OK** to save and exit the screen.

4.2   Configure MY GRID Columns

If the user has access rights to use MY GRID, the MY GRID Columns Tab will be displayed on the *Configuration* screen. This option may be used to select or de-select columns to be displayed or removed from MY GRID, as well as to arrange the display order of the columns. Using MY GRID is discussed in Section 3.

1.   Click the **Configuration** icon.

2.   Click the **MY GRID Columns** tab. The screen shows all available columns in two panels: the Selected Columns panel (columns in use) and the Available Columns panel (columns available for selection). Users will see only those functions for which they have been granted access. Here is an example:
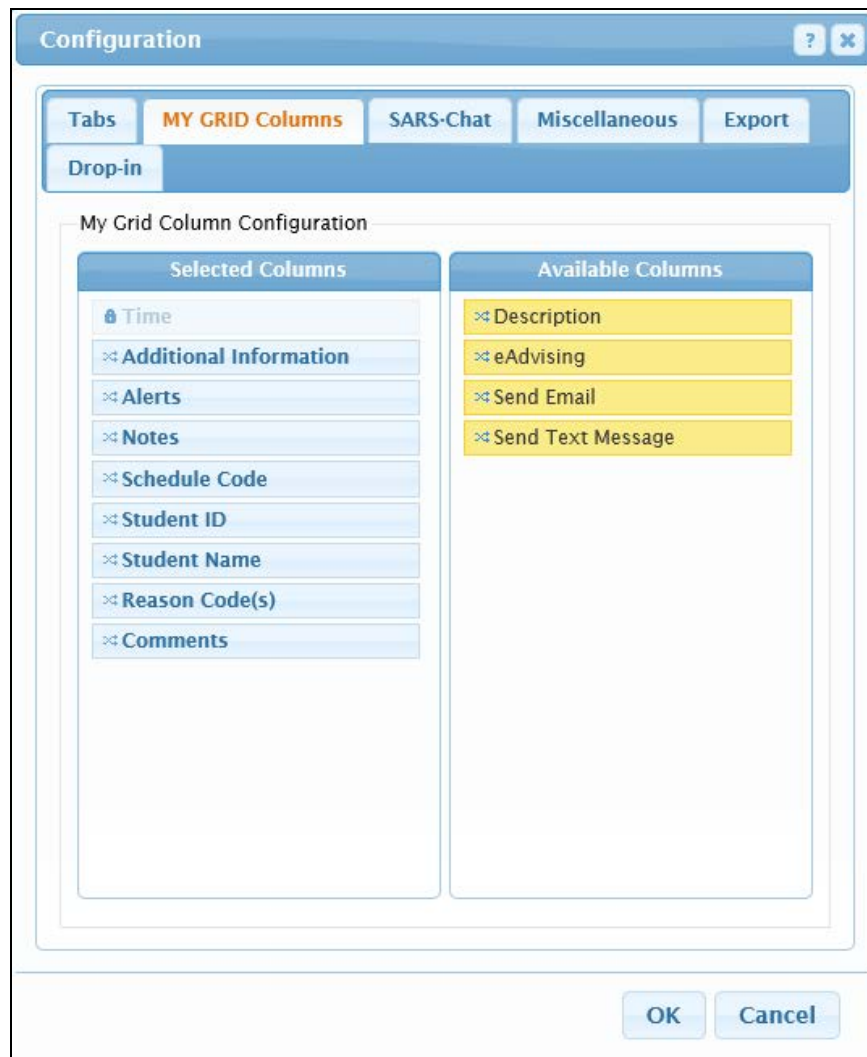
MY GRID Column Configuration		
Column Option	**Symbol**	**Description**
Selected Columns		Use to display a list of columns that are already in use for display on MY GRID.
Available Columns		Use to display a list of columns that are not in use on MY GRID.
Time		Use to display the time slots for the advisor's schedule. This column is embedded and locked in place.
Additional Information		Used to indicate that Additional Information is available about a student in a booked appointment time slot. Clicking on the icon in this column will display the Additional Information screen for the student.
Alerts	!	Used to indicate that one or more Alerts exist for a student in a booked appointment time slot. Clicking on the icon in this column will display any Alert(s) for the student.
Comments		Used to display any comments that have been entered in association with the associated appointment or time slot.
Description		Used to display a more complete description of the Schedule Code.
eAdvising		Use to view a list of all unanswered and answered eAdvising questions sent by the student in a booked appointment time slot. . Clicking on the icon in this column will display any eAdvising entries for that student.
Notes		Used to indicate that one or more Notes exist for a student in a booked appointment time slot. Clicking on the icon in this column will display the Notepad containing the notes about the student.
Reason Code(s)		Used to display the reason(s) for the appointment or activity.
Schedule Code		Used to display the Schedule Code for each time slot. The heading for the column is "Code."
Send Email		[under development]
Send Text Message	TXT	[under development]
Student ID		Used to display the student identifier for a student booked in the time slot.
Student Name		Used to display the name of the student booked in the time slot.
OK		Use to save the entries and exit the screen.
Cancel		Use to exit the screen without saving.

3. To include a column that is listed in <u>Available Columns</u>, click on the column label and then drag and drop it within the <u>Selected Columns</u> panel. Repeat this action as desired for other columns to be added.

4. To remove a column that is listed in <u>Selected Columns</u>, click on the column label and drag and drop it within the <u>Available Columns</u> panel. Repeat this action as desired for other columns to be deleted.

5. To rearrange the order of the columns, click on the column label to be moved and drag it up or down until it is placed in the desired location relative to the other items on the list. Then drop it in place. Repeat this action until all columns are in the desired order.

6. When done, click **OK** to save and exit the screen.

Version 1.0 (8/12/2015)

4.3   Configure SARS·CHAT

The SARS·Chat Tab on the *Configuration* screen is used to individualize the various settings for instant messaging through SARS Anywhere (SARS·Chat) or as a separate chat program that does not require logging in to SARS Anywhere (Desktop Chat). Each user who wishes to receive chat notifications or messages will need to establish his or her individual configuration settings. Using SARS·CHAT and Desktop Chat is discussed at Section 14.

The *Configuration* screen is also used to specify that the user would prefer to use desktop chat, rather than SARS·Chat.

1.   After logging in to SARS Anywhere as the user for whom messages are to be received, click the **Configuration** icon.

2.   Click the **SARS·Chat** tab. Here is an example:

SARS·Chat			
Option			**Description**
Settings	Disable		Use to prevent this user from sending or receiving any notifications. The lightning bolt will still be displayed, but the user will not be able to send or receive chat messages. If not checked, the SARS Chat server will be able to communicate with this user.
	Store Chat Conversations		Use to select the option to have all chat messages stored for the individual's own viewing.
Message Display	Color Code Messages		Use to select the option to individualize the color of sent and received messages.
	Sent Color		Use to select a color for sent messages.
	Sent		Used to display a sample of the selected color for sent messages.
	Received Color		Use to select a color for received messages.
	Received		Used to display a sample of the selected color for received messages.
Appointment Reminders	Chat	☑	Use to specify that appointment reminders will be sent via SARS·Chat for all Locations using SARS Anywhere.
		Min. in Advance	Use to enter the number of minutes prior to a scheduled appointment that a Chat reminder will be sent to the advisor.
	Email	☑	Use to specify that appointment reminders will be sent via email for all Locations using SARS Anywhere.
		Min. in Advance	Use to enter the number of minutes prior to a scheduled appointment that an email reminder will be sent to the advisor.
	SMS	☑	Use to specify that appointment reminders will be sent via text messaging (SMS) for all Locations using SARS Anywhere.
		Min. in Advance	Use to enter the number of minutes prior to a scheduled appointment that a text reminder will be sent to the advisor.
Notification Sound	SARS Default		Use to specify that the default sound will be used for the Notification Sound.
	Repeat		Use to have the notification sound continue until the user responds to the message. If unchecked, the notification sound will only occur once.
Popup Messages	Allow Popups		Use to have the message notification displayed on the screen. If not checked and a message is waiting, the lightning bolt will change from white to yellow with an exclamation mark contained within a red circle. (Note: This feature requires that the popup blocker in your web browser be disabled.)

SARS·Chat		
Option		**Description**
	Play Sound for Non-Popups	[Enabled if Allow Popups is not checked] Use to play the notification sound if the Allow Popups option is not enabled.
	Popup Notifications as Windows	Use if Allow Popups is checked to display each message in its own separate web browser window.
Default Chat Snooze Frequency	None 1 minute 5 minutes 10 minutes	Use to specify the number of minutes that should elapse before the next appointment reminder is received.
Desktop Chat	Install Desktop Chat	Use to install Desktop Chat, if desired. (See Section 4.3.1, below for installation instructions.)
	Using Desktop Chat	Use to specify that the user has installed the desktop chat and wishes to have all chat messages directed to the desktop chat program rather than the embedded chat application in SARS Anywhere. This will allow chat notifications, even if the user is not logged in to SARS Anywhere. If this option is selected, the SARS·CHAT option in SARS Anywhere will be disabled.
OK		Use to save the entries and exit the screen.
Cancel		Use to exit the screen without saving.

3. In the Settings panel, note that the **Disabled** option is unchecked and the **Store Chat Conversations** option is checked.

    a. To disable the chat feature, check **Disabled**.

    b. To disable the option for storing chat conversations, uncheck **Store Chat Conversations**.

4. In the Message Display panel, click **Color Code Messages** if you wish to have sent and received messages displayed in different colors. Then,

    a. Click **Sent Color** ▼ and select the desired color for messages that you will send out. The color will be displayed in the box below.

    b. Click **Received Color** ▼ and select the desired color for messages that you will receive from others. The color will be displayed in the box below.

5. In the Appointment Reminders panel,

    a. Check the **Chat** checkbox to have the system send you appointment reminders. Then in the **Min. in Advance** field, type in the number of minutes prior to the scheduled appointment that the message will be sent.

    b. Check the **Email** checkbox to have the system send you appointment reminders via email. Then in the **Min. in Advance** field, type in the number of minutes prior to the scheduled appointment that the message will be sent.

    c. Check the **SMS** checkbox to have the system send you appointment reminders via text messaging. Then in the **Min. in Advance** field, type in the number of minutes prior to the scheduled appointment that the message will be sent.

6. In the <u>Default Chat Snooze Frequency</u> panel, click ▼ and select the amount of time that should elapse between chat appointment reminder notifications.   A frequency other than None is recommended in order to save the user additional steps.

7. In the <u>Notification Sound</u> panel, note that the SARS Default sound is checked as the designated sound.

    a. Leave the **SARS Default** sound, or select **None** to specify that there should not be a notification sound.

    b. If you want the notification sound to be repeated, click **Repeat**.

8. In the <u>Popup Messages</u> panel,

    a. Click **Allow Popups** to receive a popup notification of an incoming message.

    b. If desired, also click **Popup Notifications as Windows** to display messages in a separate web browser window.

        -or-

    c. If the Allow Popups option is not checked, click **Play Sound for Non Popups** to be alerted of a message by a sound in lieu of a popup message.

Note
In order to view chat popups, your pop-up blocker must be disabled for the SARS Anywhere website. For instructions on disabling your pop-up blocker, see your web browser help file.

9. Disregard the <u>Desktop Chat</u> panel for now. This option is available if the user wishes to use a chat program that is not embedded within SARS Anywhere. The advantage is that the user does not need to be logged in to SARS Anywhere in order to send or receive messages. However, Desktop Chat has the following limitations:

- Sent and received messages cannot be color-coded.
- Multiple conversations are displayed as separate Windows.
- To start up Desktop Chat, the user must login the first time.
- If Use Desktop Chat is selected, the Chat option in SARS Anywhere will be disabled.

If Desktop Chat is desired rather than SARS·Chat, follow the installation steps and selection option at Section 4.3.1, below.

10. When done, click **OK** to save and exit the screen.

4.3.1   Install Desktop Chat

1.   In the Desktop Chat panel, click **Install Desktop Chat** to download and install the desktop chat application. An installation dialog screen will be displayed. Here is one example:
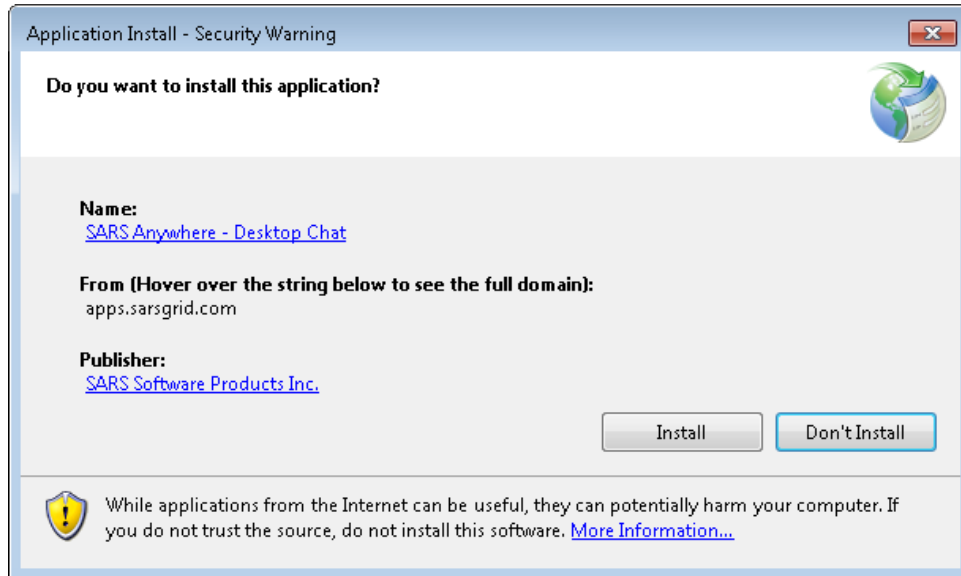
2.   Click **Install**. When the installation is complete, a *Login* screen will be displayed. Here is an example:

Login (Desktop Chat)	
Option	**Description**
SARS Anywhere URL	Use to specify the URL for the college's installation of SARS Anywhere.
Go	Use to connect to the specified URL and retrieve the database list, thereby enabling the remaining fields on the Login screen.

Login (Desktop Chat)	
Option	**Description**
Database	Use to select the SARS database that will be used for Desktop Chat.
Username	Use to enter your own SARS username.
Password	Use to enter your own SARS password.
Login	Use to login and place the Desktop Chat icon on the system tray at the bottom of your screen.
Exit	Use to exit the Login screen.

3. To login to Desktop Chat,

    a. Click the **SARS Anywhere URL** field and specify the URL for the college's installation of SARS Anywhere.

    b. Click Go to enable the remaining fields on the Login screen.

    c. Click **Database ▼** and select the SARS database that will be used for Desktop Chat.

    d. Click the **Username** field and type in your SARS username.

    e. Click the **Password** field and type in your SARS password.

    f. Click **Login**. This will place a Desktop Chat icon in your system tray on the bottom of your screen.

4. When done with the installation process,

    a. Go back to the *SARS·Chat Configuration* screen and check **Using Desktop Chat** to have all chat messages directed to the desktop chat program rather than the embedded chat application in SARS Anywhere. This will allow chat notifications, even if the user is not logged in to SARS Anywhere. The lightning bolt on the SARS Anywhere tool bar will be disabled and a small PC icon will be placed in its stead. Access to desktop chat will be via a lightning bolt on the system tray at the bottom of the screen.

    b. Click **OK**.

5. To work with Desktop Chat, see "Use Desktop Chat" at Section 14.2.

4.4   Configure Miscellaneous Settings

The Miscellaneous Tab on the *Configuration* screen may be used to establish the background theme for the individual's screen, the refresh interval, and other miscellaneous settings.

1. Click the **Configuration** icon.

2. Click the **Miscellaneous** tab. Here is an example:

Miscellaneous		
Option		**Description**
Theme	Redmond (grey/blue) Smoothness (white/grey) Darkness (black) Lightness (orange) Le-Frog (green) Start (blue) Sunny (yellow) Overcast (gray).	Use to select a color pattern for the background of the SARS Anywhere screens. The options are:
Refresh Interval	10 seconds 15 seconds 20 seconds 30 seconds 45 seconds 1 minute 2 minutes 3 minutes 4 minutes 5 minutes	Use to select the frequency with which THE GRID and MY GRID will be refreshed to show the most recent information.
Miscellaneous	Open Flyouts on Mouseover	Use to select the option to display the Flyout menu [**Name > Location > Day > Date▼**] when the cursor hovers over a feature. The default is unchecked, in which case the Flyout menu will be displayed by clicking on it.
Print Controller		Use to select the printer to be used for printing appointment confirmations.
	Install Print Controller	Use to install the Print Controller.
OK		Use to save the entries and exit the screen.
Close		Use to exit the screen without saving.

3.   In the Theme panel, click ▼ and select the desired color for the background theme.

4.   In the Refresh Interval panel, click ▼ and select the amount of time that should elapse between screen refreshes.

5.   In the Miscellaneous panel,

a.   Click **Open Flyouts on Mouseover** if you want to open the [Name > Location > Day > Date▼] menu when the mouse hovers over the Flyout label.

-or-

b.   Leave the option unchecked to open the menu by clicking on the Flyout label.

4.4.1   Select and/or Install a Print Controller

Appointment confirmations may be printed on plain sheets of paper, on labels, or on continuous feed thermal receipt paper. If labels or continuous feed thermal paper are to be used, note that SARS Anywhere is compatible with Dymo Label Writer 300 and 330 or higher. Compatibility with other label printers has not been tested and cannot be guaranteed.

The Print Controller panel on the Miscellaneous Configuration screen is used to establish printer specifications for printing appointment confirmations, which may be generated automatically if the Print Confirmation option is selected on the *Student Appointment* screen. This would occur only in the following three circumstances:

- When an appointment is committed.
- When the Reprint Confirmation button is clicked on the *Student Appointment* screen.
- When the Reprint Confirmation button is clicked on the *Roster* for a selected student.

In such a case, the user will need to select the printer to be used for that purpose. The user may (1) leave the Print Controller selection as NONE, if no print confirmations are to be generated, (2) select a pre-existing Print Controller from a list if another user has already installed one or more Print Controllers, or (3) install one or more Print Controllers and then select the desired one for use.

Note

If several computers are used by schedulers at the front desk of an office, only one of those computers needs to install the Print Controller application.

---

1. Note the **Print Controller ▼** option.

    a. If the only option on the menu is *None* and the printer that will be printing confirmations is one of your printers, the Print Controller application will need to be installed and configured for your location and desired printer. (See Step 2, below.)

    b. Otherwise, check to see if another computer in your area has the desired printer installed. If so, the user on that computer must follow the steps in Step 2, below. After the Print Controller has been installed, the user should notify you that you may now return to the *Miscellaneous* screen and select the Print Controller for use.

2. To install the Print Controller application, click **Install Print Controller.** An installation dialog screen will be displayed. Here is an example:
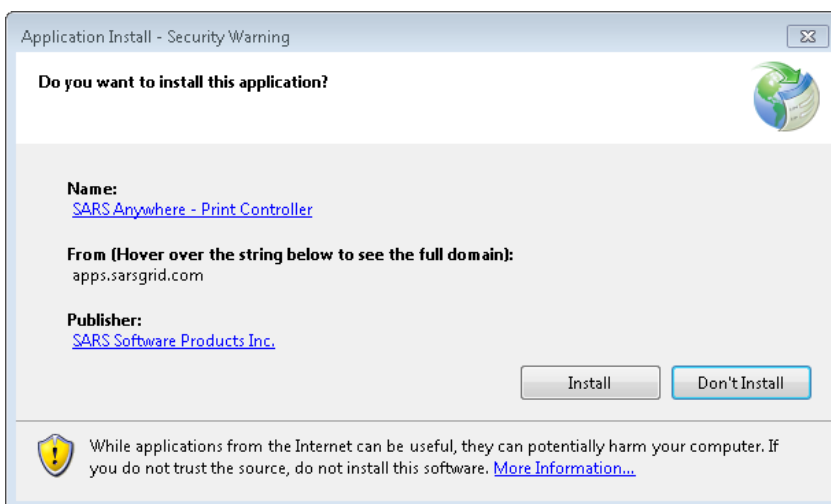
3. Click **Install**. When the installation is complete, a *Login* screen will be displayed. Here is an example:

Login (Print Controller)	
Option	**Description**
SARS Anywhere URL	Use to specify the URL for college's installation of SARS Anywhere
Go	Use to connect to the specified URL and retrieve the database list, thereby enabling the remaining fields on the Login screen.
Database	Use to select the SARS database that will be used for the Print Controller.
Username	Use to enter your own SARS username.
Password	Use to enter your own SARS password.
Login	Use to login and place a printer icon on the system tray at the bottom of your screen.
Exit	Use to exit the Login screen.

4. To login to the Print Controller,

  a. Click the **SARS Anywhere URL** field and specify the URL for the college's installation of SARS Anywhere.

  b. Click **Go**.

  c. Click **Database ▼** and select the SARS database that holds the appointments for which confirmations will be printed on a selected Print Controller.

  d. Click the **Username** field and type in your SARS username.

  e. Click the **Password** field and type in your SARS password.

    f.   Click **Login**. This will place a printer icon in your system tray on the bottom of your screen.

5.   Right click on the printer icon in the system tray and choose **Status**, or double click to display the *SARS Anywhere Print Controller* screen. Here is an example:
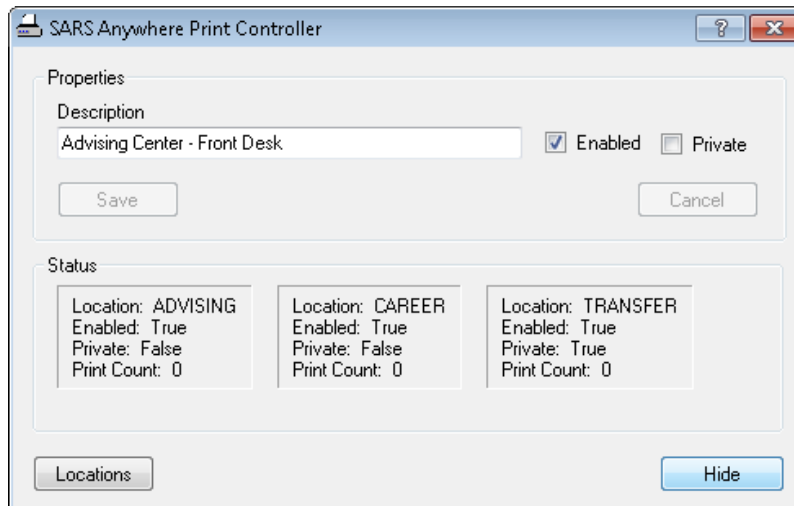
SARS Anywhere Print Controller		
Option		**Description**
Properties	Description	Use to type in an identifiable name for this Print Controller (e.g., Advising Center – Front Desk).
	Enabled	Use to activate this Print Controller for printing confirmations.
	Private	Use to prevent other users from printing appointment confirmations to this Print Controller.
	Save	Use to store the settings.
	Cancel	Use to exit the screen without saving.
Status		Used to display the Print Controller properties for each Location
Locations		Use to gain access to the *Location Configuration* screen.
Hide		Use to hide the *SARS Anywhere Print Controller* screen.

6.   In the <u>Properties panel</u>,

    a.   Click the **Description** field and type in an identifiable name for this Print Controller, which will be shown on the list on the *Miscellaneous* configuration screen. For example, **Advising Center – Front Desk**.

    b.   Disregard the **Enabled** checkbox at this time. It should be checked only after the Print Controller is fully configured. See Step 10, below.

    c.   Check **Private** to prevent other users from printing appointment confirmations to this Print Controller. If Private is left unchecked, all users in SARS Anywhere will be able to select this Print Controller for use.

d.   Click **Save**.

7.   Note the Status panel. If Print Controllers have been installed and configured for other Locations, their properties will be displayed here.

8.   Click **Locations** to display a *Location Configuration* screen. Here is an example:

Location Configuration (Print Controller)		
Option		**Description**
Location		Use to select the Location (e.g., Advising) in which appointment confirmations will be printed.
Printer		Use to select the printer that will be used for printing appointment confirmations.
Output Type	Plain Paper	Use to establish that the appointment confirmation twill be printed on whatever paper is currently loaded in the printer.
	Large Label	Use to establish that the appointment confirmation will be printed on a 2-5/16" X 4" label [Dymo Shipping Label # 30256 – adhesive], a 2-1/8" X 4" label [Dymo Shipping Label # 30323 – adhesive], or a 2-7/16" wide continuous feed thermal tape [Dymo Continuous Paper # 30270]. The large label will print the entries from the Confirmation Settings screen, as well as the name of the student and advisor; the appointment date, day and time; and the advisor's room number if this option is being used.
	Small Label	Use to establish that the appointment confirmation will be printed on a 1-1/8" X 3-1/2" label [Dymo Address Label # 30252 – adhesive]. The small label will print the name of the student and advisor; the appointment date, day and time; and the advisor's room number if this option is being used.

Location Configuration (Print Controller)	
Option	**Description**
Copies	Use to indicate the number of original appointment confirmations that will be printed automatically if the print confirmation option is selected.
Reprint Copies	Use to indicate the number of appointment confirmations that will be printed when the Reprint Confirmation option is selected.
Private	Use to specify that the selected Location will be available for your use only in this Print Controller.
Enabled	Use to allow confirmations to be printed for this Location by this Print Controller.
Add	Use to add a Location and the properties of the printer to be used for that Location.
Save	Use to store the settings.
Cancel	Use to exit the screen without saving.
Delete	Use to delete a Location and its associated printer properties.
Test	Use to test the settings by send a test page to be printed by the selected Print Controller.

    a.   Click **Add** to enable fields for adding a Location.

    b.   Click **Location ▼** and select the Location in which appointment confirmations will be printed.

    c.   Click **Printer ▼** and select the printer to be used for appointment confirmations for this Location.

    d.   In the <u>Output Type panel</u>, select **Plain Paper**, **Large Label** or **Small Label**, depending on the type of output for the appointment confirmations. If Large Label is selected, see the **WARNING** message at the end of this section.

    e.   Click **Copies ⇕** and select the number of original copies of the appointment confirmation to be printed.

    f.   Click **Reprint Copies ⇕** and select the number of copies of the appointment confirmation to be printed at any time after an appointment is committed.

    g.   [If desired] Check **Private** to prevent other users from printing appointment confirmations for this Location to this Print Controller. Use caution when selecting this option.

    h.   Check **Enabled** to make the selected printer available for use for the selected Location.

    i.   Click **Save** to store the settings.

    j.   Click **Test** to send a test confirmation to the designated printer to verify that the settings work.

    k.   Repeat steps 8.a. through j. for any additional Locations.

       Here is an example of the plain paper confirmation.

```
┌─────────────────────────────────────────────────────────────┐
│                 North Bay Community College                   │
│                       Advising Center                         │
│                     Please be prompt.                         │
│              To cancel, telephone (415) 123-4567.             │
├─────────────────────────────────────────────────────────────┤
│   Name:        SMITH, JOHN                                    │
│   Advisor:     JOHN ADAMS                                     │
│   Date:        Thursday, May 7, 2015                          │
│   Time:        2:00 PM                                         │
│   Room:        Bailey Hall, Room 100                          │
│   Reason:      CRISIS                                          │
└─────────────────────────────────────────────────────────────┘
```

Here is an example of the small label.

```
╭─────────────────────────────────────╮
│  Name:      SMITH, JOHN              │
│  Advisor:   JOHN ADAMS               │
│  Date:      Thursday, May 7, 2015    │
│  Time:      2:00 PM                  │
│  Room:      Bailey Hall, Room 100    │
│  Reason:    CRISIS                   │
╰─────────────────────────────────────╯
```

Here is an example of the large label.

```
╭─────────────────────────────────────╮
│       North Bay Community College    │
│            Advising Center           │
│           Please be prompt.          │
│     To cancel, telephone (415) 123-4567. │
│                                      │
│  Name:      SMITH, JOHN              │
│  Advisor:   JOHN ADAMS               │
│  Date:      Thursday, May 7, 2015    │
│  Time:      2:00 PM                  │
│  Room:      Bailey Hall, Room 100    │
│  Reason:    CRISIS                   │
╰─────────────────────────────────────╯
```

9. Click **X** on the upper right corner to return to the SARS Anywhere Print Controller screen.

10. On the *SARS Anywhere Print Controller* screen, click the **Enabled** checkbox to activate this Print Controller for printing confirmations.

11. Click **Save**.

12. Click **X** to close the *SARS Anywhere Print Controller* screen.

13. Return to the *Miscellaneous* screen in SARS Anywhere, click **Print Controller ▼** and select the print controller from the list.

Note

If the newly-configured Print Controller is not displayed on the list, press **F5** to refresh SARS Anywhere and then return to the *Miscellaneous* screen and make your selection.

Warning

If the Large Label option has been selected, shipping label 30256 may or may not be compatible with the label printer. If this is the case, select a different label number (such as 30323) that is marked "shipping." Print a test label until you have verified that the label selected is compatible and prints correctly.

4.5   Configure Export Settings

An automated process exists for exporting schedules into Microsoft Outlook. After that program has been activated by computer staff, advisors will need to configure their own settings for the export process.

Note

This option is available only if the Email Address field for the advisor on the *Short Name Maintenance* screen is completed with the email address provided by the college and corresponds with the advisor's calendar in Microsoft Outlook. (See Short Name Maintenance in the SARS Anywhere Administration Manual at Section 14.)

If an advisor is assigned to more than one Location, the steps described below will need to be performed separately for each Location. The advisor must start from MY GRID in the desired Location when starting each export process.

If the user has access rights to use MY GRID, the **Export Configuration tab** will be displayed. The *Export* configuration screen may be used to individualize the user's export settings.

1.   Click the **Configuration** icon.

2.   Click the **Export** tab to display the *Export Configuration* options screen. Here is an example:

Export Configuration		
Option		**Description**
Settings	Location	
	Export Enabled	Use to initiate the export process from SARS Anywhere to Microsoft Outlook™.
Days	From Today	Use to specify the number of days in advance to start the automated export process. "0" means to include "today." "1" means to start tomorrow. "2" means to start the day after tomorrow, etc.
	Number	Use to specify the number of days to include in the automated export. The range is 1 – 999. If "5" is selected, five days will be exported.
Export	All Time Slots	Use to export all activities to a user's Outlook calendar.
	Student Contacts Only	Use to export only those activities associated with direct student contact to a user's calendar.
Appointment Settings	Subject	Use to select the information to be displayed in the Subject field of the Outlook Appointment screen.

Export Configuration			
Option		**Description**	
	Location	Use to select the information to be displayed in the Location field in the Outlook Appointment screen.	
	Body	Use to select the information to be displayed in the body of the Outlook appointment screen.	
	Reminder	Use	Use to activate a feature that provides an audible (beep) and visual (popup message) alert about upcoming appointments.
		Minutes Before	Use to enter the number of minutes prior to appointment start times that reminders will be sent.
Schedule Codes		Use to filter which Schedule Codes will be exported with the "All Time Slots" export setting. This is a one-time set up, unless it later becomes necessary to change the configurations.	
Save Export Settings		Use to save the settings and remain on the screen.	
OK		Use to save the entries and exit the screen.	
Cancel		Use to exit the screen without saving.	

3. If needed, click **Location ▼** and select the location from which the user's calendar will be exported.

4. Click **Export Enabled** to activate the export process.

5. In the <u>Days</u> panel,

   a. Click **From Today ▼** and select the number of days in advance of today that the automatic export should start. If "0" is selected, the export will start today. If "1" is selected, the export will start tomorrow. If "2" is selected, the export will start the day after tomorrow, etc.

   b. Click **Number ▼** and select the number of days to include in the export. For example, if "5" is selected, five days will be exported to Microsoft Outlook™.

6. In the <u>Export</u> panel,

   a. Click **All Time Slots** to export the entire calendar to the user's Outlook calendar.

   -or-

   b. Click **Student Contacts Only** to export only the time slots containing student appointments to the user's Outlook calendar.

7. In the <u>Appointment Settings</u> panel,

   a. Click **Subject ▼** to make a selection for use in the subject field. Then choose one of the following three options:

      i)   Select **Student Contact (Default)** to display the words "Student Contact" in the field.

      ii) Select **Custom (Fill-In)** to enter your own description for this field. For example: "Booked Appointment."

      iii)   Select **Student Name** to have the screen display the student's name as listed in SARS Anywhere.

  b. Click **Location ▼** to make a selection for the location field. Then choose one of the following three options:

      i)   Select **Blank (Default)** to leave this field empty.

      ii)   Select **SARS Anywhere Location** to display the location code description from SARS Anywhere.

      iii)   Select **Room Number** to display the room number assigned to the advisor.

Note

The location of the appointment is displayed in parentheses in the subject field if the Location field is not Blank.

---

  c. Click **Body ▼** to select the data items to be displayed in the main body of the appointment detail screen. Then choose one of the following six options:

      i)   Select **Comments** (the default) to display the descriptive reason for the appointment.

      ii)   Select **Comments & Reason Codes** to display both the descriptive reason for the appointment and the associated reason code.

      iii)   Select **Student Name** to display the student's name.

      iv)   Select **ID & Student Name** to display both the student's name and his/her identifier.

      v)   Select **All** to display all of the following information: Comments, Reason Codes, Student Name, and ID.

      vi)   Select **Blank** to leave the body of the appointment empty.

  d. [optional] In the Reminder panel,

      i)   Click **Use** to activate the feature that sends a pop-up message notifying the advisor of an imminent appointment.

      ii)   In **Minutes Before**, enter the number of minutes prior to the appointment time for the reminder to be displayed. For example, "10" will cause a reminder pop-up to be displayed ten minutes prior to the appointment time. The field will accept up to three digits.

8. If **All Time Slots** is selected (see step 6.a., above) and this is a first time set up or if changes need to be made to previously established configurations, click **Schedule Codes** to display a Schedule Codes screen. This screen is used to select the Schedule Codes to be exported and to ensure that the status of the time slot is correct. Here is an example.

Schedule Code	Description	Status	Export
....	Off Duty		☐
ADMIN	Administrative Time		☐
BOOKED	Booked Appointment		☑
CLASS	Teaching Class		☑
CLOSED	Office Closed		☐
CONF	Conference		☑
DROP-IN	Drop-In Visit		☑
EVENT	Event		☐
LUNCH	Lunch		☐
MTG-COMM	Meeting: Committee		☑

Save   **Cancel**

a. Move the cursor to the applicable Schedule Code. In the **Export** column, check the checkbox to indicate that the Schedule Code will be exported to your Outlook calendar.

b. For each Schedule Code that has bee checked, note the Status setting (the default is Busy). To change the status, click ▼ to select one of the following: **Free, Tentative, Busy, Out of Office**.

Note

The status for any Booked Codes (for example, Booked, Showed and No Show) should be set as **Busy**.

c. Click **Save**.

d. Repeat steps a - c for each Schedule Code to be exported.

e. When done, click **Close**.

9. When done, click **Save Export Settings** to save the settings and remain on the screen.

-or-

Click **OK** to save the settings and exit the screen.

10. In Microsoft Outlook™, click **Calendar**. The calendar page will display the imported appointment information, as shown on the following page.
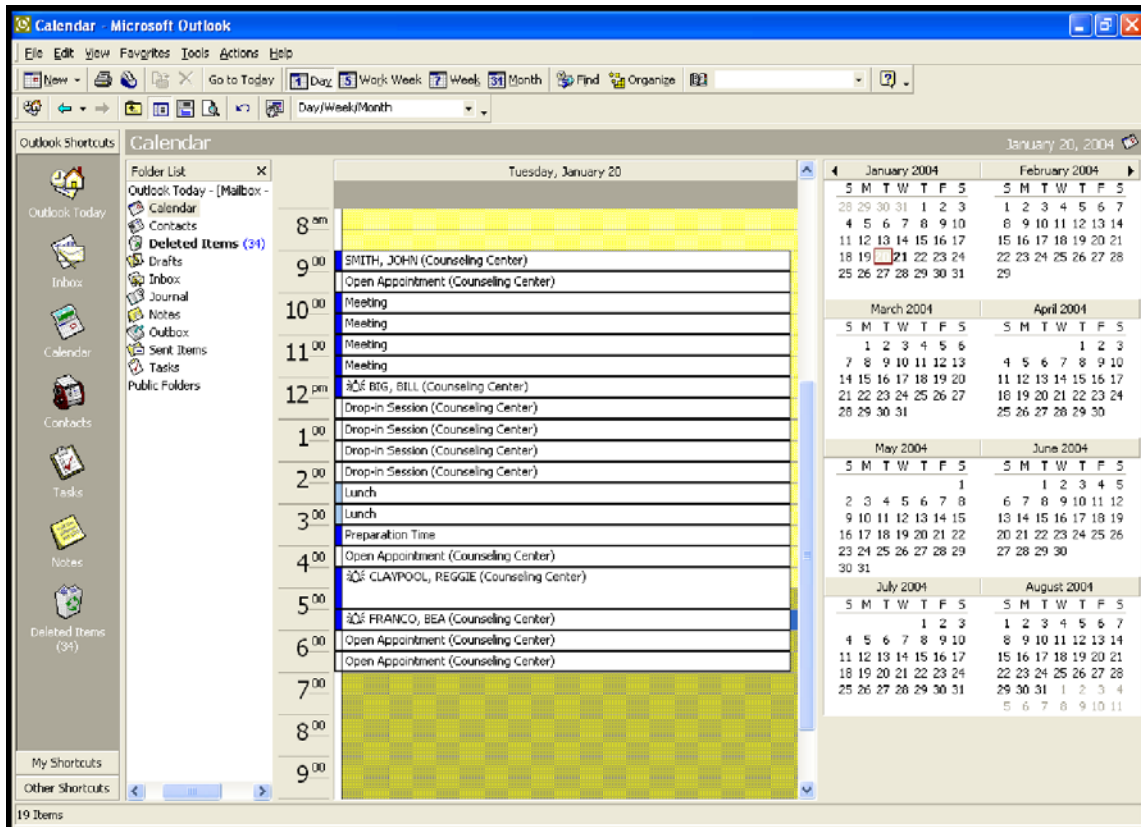
To view the appointment detail for a particular student, click anywhere within the appointment time slot. A detail screen will be displayed as in the example above for the 9:00 a.m. time slot containing the name SMITH, JOHN. (Note that the entries in the Subject and Location fields are based on the selections made in the *Outlook Export Configuration* screen.) Microsoft Outlook™ uses colors to designate types of activities, as follows: Free = white, Tentative = turquoise; Busy = Royal Blue; and Out of Office = Purplish-brown.

Note

Any existing information entered directly into the Outlook calendar will remain, even if a SARS activity is exported into the calendar for the same time slot. In such cases, a split line will be displayed for that time slot, showing both activities.

4.6   View or Configure Drop-in Settings

If the user has access rights to Drop-ins, the Drop-in Configuration tab will be displayed. If the system administrator has checked the Allow User Settings option on the *Drop-in Configuration* screen, users may configure their own default settings for the Drop-in screens for the designated Location. Otherwise, they may use this screen to view their pre-established settings. Drop-ins are discussed at Section 7.

1.   Click the **Configuration** icon.

2.   Click the **Drop-in** tab. Here is an example of the screen if the user is allowed to configure his/her own settings:

Note
If users do not have permission to change their settings, they will still be able to view the drop-in settings established for them. The screen will display the settings, but it will be in disabled mode.

Drop-in Configuration		
Option		**Description**
Drop-in Configuration	Location	Use to select the Location for which the Drop-in settings will apply.
	Settings	Used to select or display the user for whom the Drop-in settings will apply.
	Allow User Settings	[Displayed if the user has access rights to Drop-ins/Change Configuration.] Used to permit users access to the Drop-in Configuration screen to make changes to their own settings.
	Local Admin Settings	[Toggles from Allow User Settings after a User Name is selected] Use to allow the system administrator to make changes to the Drop-in settings for a specific user logon. [See "Change Default Settings (Local Admin Settings)" in the SARS Administration Manual at Section 18.2.]
Reason Code Settings	Use Reason Code Group	Use to activate the option to use Reason Code Groups.
	Default Reason Code Group	[Enabled if Use Reason Code Group is checked] Use to select the Reason Code Group in order to limit the choice of reasons on the Student Drop-In Screen. Only those Reason Codes that are assigned to the selected Default Reason Code Group will be displayed.
	Default Reason Code	Use to select the Reason Code that will be inserted automatically when a student registers.
	Show Reason Codes on List	Use to display Reason Codes on the Drop-in Screen. If this option is checked, another column will be placed on the screen with the title "Reason Code(s)."
Specialty Group Settings	Use Specialty Group	Use to activate the option to use Specialty Groups.
	Default Specialty Group	[Enabled if Use Specialty Group is checked] Use to select the code to be used as the default (e.g., ADJUNCT). Only those advisors who have been assigned to that group will be displayed on the *Student Drop-in Appointment* screen.
Miscellaneous Settings	Allow Multiple Drop-ins	Use to allow a student to be listed on the waiting list more than once in cases where the student may have more than one consecutive drop-in session.
	Hide Confirmation Messages	Use to eliminate the confirmation messages that are usually displayed when a student is being added to or selected from the list.
	Lock Date	Use to lock the screen to display only the current date.
	Minutes Since Check-in	Use to display the time that has elapsed since check-in, in lieu of the student's check-in time.
	Show Student ID	Use to allow a student's primary identifier to be displayed on the Drop-in list (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID, Guest ID).

Drop-in Configuration		
Option		**Description**
	View Only	Use to prevent users on the computer from taking any action on the *Student Drop-In Appointment* screen other than viewing the list of students. This will override any scheduling access rights that a user might have.
Appointment Conflicts	Check for Appointments	Use to have the system check for any booked appointments that will potentially conflict with this drop-in activity, based on the time that the student is being added to the Drop-in list and the setting for Minutes in Future.
	Minutes in Future	Use in conjunction with Check for Appointments. The purpose of this feature is to trigger a warning message if an appointment exists for the student in any Location within the database that would conflict with the current drop-in visit. Use to specify the number of minutes beyond the present time to check for any conflicts (e.g., 240 minutes).
Save Drop-in Settings		Use to store the selections and remain on the screen.
OK		Use to save any entries and exit the screen.
Cancel		Use to exit the screen without saving.

3. For users who have been granted permission to change their user settings, follow the steps below.

    a. Click **Location ▼** and select the Location for which the Drop-in settings will apply.

    b. Note that the **Settings** field should default to the user's own name.

    c   In the <u>Reason Code Settings</u> panel,

        i) Click **Use Reason Code Group** to activate the option to use Reason Code Groups on the *Student Drop-in Appointment* screen.

        ii) Click **Default Reason Code Group ▼** and select the desired Code (e.g., DROPIN). Only those Reason Codes that have been assigned to that group will be displayed on the Student *Drop-in Appointment* screen.

        iii) Click **Default Reason Code ▼** and select the code to be used as the default (e.g., ADVISING) to be inserted automatically when a student registers. If no default code is desired, select (NONE) from the top of the menu.

        iv) Check **Show Reason Codes on List** to display Reason Codes on the *Student Drop-in Appointment* screen.

    d   In the <u>Specialty Group Settings</u> panel,

        i) Click the checkbox for **Use Specialty Group** to limit the choice of advisors on the *Student Drop-in Appointment* screen.

        ii) Then click Default **Specialty Group ▼** and select the desired code. Only those advisors who have been assigned to that group will be displayed on the *Student Drop-in Appointment* screen.

e   In the Miscellaneous Settings panel,

    i)   Check **Allow Multiple Drop-ins** to allow a student's name to be placed on the waiting list more than once. This allows the student to check in at one time for multiple drop-in sessions rather than having to re-check in after finishing the prior session. The option keeps the placement of the student's name at the original check-in time sequence.

    ii)   Check **Hide Confirmation Messages** to prevent confirmation messages from being displayed when a student is being added to or selected from the list.

    iii) Check **Lock Date** to disable the Date field on the Drop-in list. Only the current date will be displayed in this mode.

    iv)   Check **Minutes Since Check-in** to display the time that has elapsed since check-in in lieu of the student's check-in time.

    v)   Check **Show Student ID** to display the student's primary identifier on the Drop-in list.

    vi)   [Only if unique settings for a specific log-in are being established - not applicable to default settings] Check **View Only**, which prevents the user who is logged in from taking any action on the screen other than viewing the list of students. This option may be useful for screens located in a public shared area.

f   In the Appointment Conflicts panel,

    i)   Check **Check for Appointments** to have the system check if an appointment exists for the student in any Location within the database that would conflict with the current drop-in visit.

    ii)   Check **Minutes in Future** and specify the number of minutes beyond the present time that the system should look for a scheduled appointment that might conflict with the drop-in visit (e.g., 240 minutes).

g   Click **Save Drop-in Settings**.

4.   When done, click **OK** to save and exit the screen. The drop-in settings will be established for that user's SARS logon only.

SECTION 5   QUICK LINKS

5.0   Overview

Quick Links is used to obtain a list of features or commands that enable the user to perform a function that involves something other than just making or canceling an appointment. The feature is located on the tool bar after logging in to SARS Anywhere from the web.

↓

The display options from the Quick Links menu are dependent on the following:

- Only those functions to which the user has access rights will be displayed.

  -and-

- Only those functions that are available from the active screen will be displayed.

  Here is an example of the Quick Links menu listing all possible options from THE GRID.
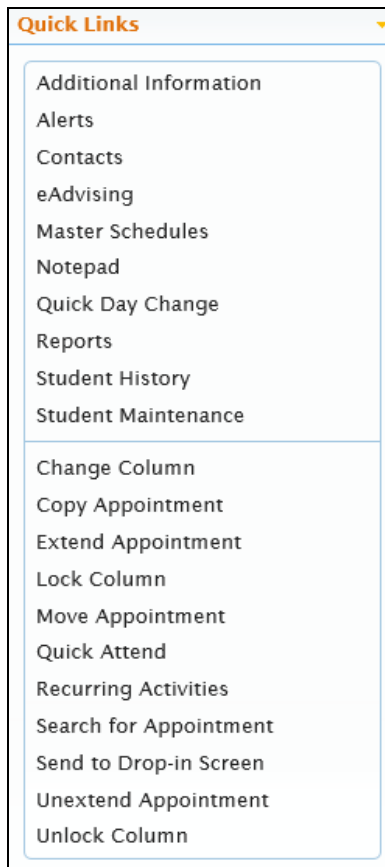
Note that, depending on the screen that is active, the available actions that may be performed from that screen will be grouped together below a dividing line on the Quick Links menu.

Quick Links	
Options	**Description**
Additional Information	Use to view and, if permitted, to record or change responses about a student. (See "Additional Information" at Section 9.)
Alerts	Use to display or enter a message that is viewable by advisors or by schedulers who have access to this Location. Student alerts will also be viewable by students when making their own appointments via eSARS. (See "Alerts" at Section 10.)
Change Column	Use to change part or all of a column on THE GRID or MY GRID to the same Schedule Code, or to reset an entire column to the corresponding column on the advisor's Master Schedule. (See "Change Schedules" at Section 13, and specifically Sections 13.1, 13.2 and 13.3.)
Contacts	Use to keep a count of the number of informal student contacts made each day in addition to appointments and drop-in visits. (See "Contacts" at Section 12.)
Copy Appointment	Use to apply existing student appointment information to other appointment slots when scheduling recurring appointments. This feature is particularly useful for any work unit that meets with a student on several occasions for the same reason and wants to schedule all or most of the appointments in one scheduling session. The recurring appointment may be made with different advisors, days of the week or times. The option toggles to Stop Copy Appointment while copying is in process, which may be used to stop the copying action. (See "Copy a Scheduled Appointment" at Section 6.8 and "Copy a Group Appointment to Another Group Time Slot at Section 6.9.)
eAdvising	Use to view a list of unanswered eAdvising questions sent by any student, as well as to reply to or delete an unanswered question. (See "eAdvising" at Section 17.)
Extend Appointment	Use to make a booked appointment longer. (See "Extend and Unextend an Appointment" at Section 6.5.)
Lock Column	Use to lock a column on THE GRID to make a date unavailable for scheduling. (See "Lock or Unlock a Column" at Section 13.4.)
Master Schedule	Use to create and add a user's master schedule. (See "Master Schedules" at Section 15).
Move Appointment	Use to move a scheduled appointment to another appointment slot. The option toggles to Stop Move Appointment while moving is in process, which may be used to stop the moving action. (See "Move a Student from a Booked Appointment" at Section 6.6 and "Move a Group Appointment to Another Time Slot" at Section 6.7.)
Notepad	Use to display the Notepad in order to view, print, write, and, in some cases, delete and change the security status of notes about students. (See "The Notepad" at Section 16.)
Quick Attend	Use to record attendance for several student appointments occurring on the same date in one step. (See "Record Attendance Using Quick Attend" at Section 11.3.)

Quick Links	
Options	**Description**
Quick Day Change	Use to change an advisor's schedule after it has been added to THE GRID and MY GRID. (See "Use Quick Day Change to Change a Schedule" at Section 13.1.)
Recurring Activities	Use to schedule recurring appointments or meetings for a single advisor for the same day of the week and time. (See "Make Recurring Appointments" at Section 6.15 and "Make Recurring Meetings" at Section 13.5.)
Reports	Use to view and/or print selected reports. (See the SARS Anywhere Reports Manual.)
Search for Appointment	Use to find a list of available appointments that satisfy the student's preferences. (See "Search for an Available Appointment Slot" at Section 6.4.)
Send to Drop-in Screen	Use to either copy or move a selected student to the Drop-in Screen for a drop-in visit. (See "Send a Student to the Drop-in Screen" at Section 6.10)
Student History	Use to gain access to the Student History screen containing all appointment and drop-in history for the selected student, as well as a history of all answered eAdvising questions. (See "Student History" at Section 8.)
Student Maintenance	Use to gain access to the Student Maintenance screen in order to add a student, change information about a student, merge IDs, or delete a student in a case where no appointment activity has yet been recorded. (See "Student Maintenance at Section 19.)
Unextend Appointment	Use to shorten an extended appointment one cell at a time. (See "Extend and Unextend an Appointment" at Section 6.5.)
Unlock Column	Use to unlock a column that has been locked. (See "Lock or Unlock a Column at Section 13.4.)
Waiting Status	[available when the focus is on a booked appointment on MY GRID] Use to communicate with the Public Viewer waiting list to notify a student who has registered for a drop-in visit or a booked appointment to proceed to the advisor's office, or to remove the student from the list after the visit is completed. (See "The Waiting List" at Section 18.)

5.1   Perform Actions Using Quick Links

5.1.1   From a Booked Appointment on THE GRID or MY GRID

Using the Quick Links menu to perform scheduling-related actions for a specific booked appointment should be done ONLY AFTER ensuring that the focus is on the desired booked time slot. These functions include: Copy Appointment, Extend Appointment, Move Appointment, Send to Drop-in screen, Unextend Appointment. Failure to have the focus correctly placed could result in the action being taken for the incorrect cell.

1.   First place the focus on the booked appointment time slot for which the scheduling action is to be performed.

2.   Click **Quick Links ▼** and select the desired option.

3. Refer to the relevant Sections of this manual for step-by-step instructions.

5.1.2   From a Selected Column on THE GRID

Using the Quick Links menu to perform additional operations on THE GRID related to a specific column should be done <u>ONLY AFTER</u> ensuring that the focus is placed somewhere within the column to be changed. These functions include: Change Column, Contacts, Lock Column, Quick Day Change and Unlock Column. Failure to have the focus correctly placed could result in the action being taken for the incorrect date.

1. First place the focus anywhere within the column to be changed.

2. Click **Quick Links ▼** and select the desired option.

3. Refer to the relevant Sections of this manual for step-by-step instructions.

5.1.3   From Any Unbooked Time Slot in SARS Anywhere

Many functions may be performed without placing the focus on a particular time slot or column on THE GRID or MY GRID. However, it will be necessary to enter the student's ID and name manually on the screen, once it is displayed.

1. From any time slot on THE GRID or MY GRID, click **Quick Links ▼** and select the desired option.

2. Enter the student's identifying information, if required for the selected function.

3. Refer to the relevant Sections of this manual for step-by-step instructions.

SECTION 6   SCHEDULING FUNCTIONS

6.0   Overview

The major screens used for scheduling student appointments are the *Student Appointment Screen* (for individual appointments), the *Roster* (for group appointments or activities), and eSARS (the student web interface). The eSARS interface is discussed in the SARS Anywhere Administration Manual at Section 19.

Note about Terminology

Throughout these chapters, the word Advisor is used generically to describe any person who may have appointments and/or drop-in visits with students and has a Short Name. THE GRID will reflect the job title or role of individuals within each Location (e.g., Counselor, FA Specialist, Tutor). This title is governed by a Short Name Label selection. While this selection defaults to "Advisor," the System Administrator may select a "title" that more correctly identifies the role of the individuals in the Location (e.g., Counselor, Tutor, Nurse, etc.).

6.1   The Student Appointment Screen

The *Student Appointment Screen* is used to make appointments from THE GRID and from MY GRID. Here is an example of the initial screen layout after clicking on an individual appointment time slot.

Here is an example of the *Student Appointment Screen* before an individual appointment has been committed.

The *Student Appointment Screen* displays the following options:

Student Appointment Screen		
Option		**Description**
Student Information	Student ID	Use to record the student identifier (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID). The field label will be the primary ID format. Other ID formats (if they are being used by the Location), such as Guest ID, may be selected by clicking on the Student ID label and selecting the desired format.
	✏	Use to automatically change the ID field to the Guest ID format and to generate a temporary identifier with **SG** as the leading characters.
	Name	Use to record the student's name. If preferred names are allowed, that name will be displayed within quotation marks following the student's full name.
	+/-	Use (+) after entering a student ID to display a screen on which the user may view or record student name details. Once the screen has been opened, clicking on the (-) symbol will close the screen. Splitting a student name into separate fields provides for great flexibility. For example, it allows users to personalize email messages (e.g., Dear John, vs. Dear SMITH, JOHN). It provides for more consistent sorting by last name on reports. And it more reliably abbreviates last names on the Waiting List.

Student Appointment Screen			
Option			**Description**
		First Name	Use to enter the student's first name.
		Middle Name	Use to enter the student's middle name, or middle initial.
		Last Name	Use to enter the student's last name.
		Suffix	Use to enter any suffix for the student's name, if any.
		Preferred Name	Use to enter the student's preferred name, such as a nickname. This field will be displayed only if it is activated in Global Configurations.
	Search / Reset		Use to search for a Student ID by using the Student Name. This button may change to Reset if an ID is entered that does not exist in the database, depending on the system settings.
	Birth Date		Use to display or record the student's date of birth.
	Home Phone		Use to display or record the student's permanent telephone number, which is typically the number stored in the college's database.
	Extension		Use to display or record the extension to the permanent telephone number.
	Contact Phone		Use to display or record the student's preferred contact telephone number, if different from the Home Phone. The system will use the number in this field, if it is populated.
	Extension		Use to display or record the extension to the contact telephone number.
	Text Phone		Use to display or record the student's cell phone number if it has text messaging capabilities.
	Email		Use to display or record the student's primary email address. This is the email address that is stored in the college's database.
	Email 2		Use to display or record the student's alternate email address, if allowed. If Email 2 is present, then it is the email address that is used by the system.
Appointment Information	Reason Code		Use to select one or more reasons for making a specific appointment.
	+		Use to display a screen showing all Reason Codes at a glance and to select one or more codes from that screen.
	Comments		Use to enter specific information about the reason for making an appointment.
	Room #		Use to display on the *Student Appointment Screen* and on the appointment confirmation the advisor's room number in order to advise the student of the location of the scheduled appointment.

Student Appointment Screen		
Option		**Description**
Confirmation Options	Email	Use to send an email confirmation to the student when an appointment is scheduled. This option will be disabled if the student does not have an email address. The email option on the *Opt-in* screen must also be checked for this to be operational.
	Print	Use to print a confirmation when an appointment is first scheduled.
	Text	[Available if the college has a valid license for text messaging] Use to send a confirmation to the student via text messaging when an appointment is scheduled. This option will be disabled if the student does not have a text cell phone. The Text option on the *Opt-in* screen must also be checked for this to be operational.
[Other Options]	Additional Info	[Available if the Location has opted to include this feature and if the user has been given permission.] Use to view, and if permitted, to record responses to pre-established questions that will provide more detailed information about the student.
	Alert	Use to enter or display a message that is viewable by advisors or schedulers.
	Extend	Use to make a booked appointment longer.
	Notepad	[Enabled for users with Notepad access] Use to display the Notepad in order to view, print, write, and, in some cases, delete and change the security status of notes about students. (See "The Notepad" at Section 16.)
	Opt In Settings	Use to specify the available and preferred methods for contacting the student (phone, email and/or text).
	Reprint Confirmation	Use to print an appointment confirmation at a later time, after the appointment has been committed. [Activated only after the scheduler has committed the appointment.]
	Roster	[Enabled only for group appointments] Use to gain access to the Roster for the group appointment. (See "The Roster" at Section 6.2.)
	Set Activity Times	[under development] [Enabled if Set Activity Times has been activated and then for any individual booked appointment if attendance has been marked Yes] Use to set the actual start time and stop time of the appointment.
	Student History	Use to gain access to the Student History screen containing all appointment and drop-in history for the selected student, as well as a history of all answered eAdvising questions.
	Unextend	Use to shorten an extended booked appointment one cell at a time.

Student Appointment Screen		
Option		**Description**
	View Course List	[Enabled if courses are being used as Reasons] Use to view a list of courses in which the student is currently enrolled and, if needed, select courses as reasons for the appointment.
Term		[Available if Show Term List has been selected on the *Miscellaneous Settings* screen for this Location] Use to give users the option to link the topic of the current appointment to a specific term (e.g., discussion of an Ed Plan for the next semester).
Info Flags		[Enabled after a Student ID is entered, if the Location has opted to include the Additional Info Flags feature] Use to display up to four Additional Information questions about the student. Info Flags that are marked "Yes" are shown as checked, have a green background, and appear at the top of the cluster of questions. Info Flags that are marked "No" are unchecked and have a red background. (See "Establish Additional Information Flags for Display on the Student Appointment and Drop-in Appointment Screens" in the SARS Anywhere Administration Manual at Section 12.6.)
[Button Bar]	Commit/Cancel	[This is a toggle button that is activated only after the scheduler has entered a student's ID and moved to the next field.] Use to obligate the appointment. In Cancel mode, use to cancel the appointment after it has been committed.
	Attendance	[Activated after the appointment has been committed] Use to record whether a student attended a scheduled appointment.
	Close	Use to exit the screen.

6.2   The Roster

The *Roster* is used to view and print a list of students enrolled in a group appointment and, if given the appropriate permissions, to perform the following group appointment actions: cancel one or more students from the appointment, move a student to another appointment cell, copy a student appointment to another appointment cell, record appointment attendance, record additional information, reprint an appointment confirmation, record Reason Codes and any corresponding comments, and to change the maximum number of students allowed in the group appointment. The *Roster* may also be used to view the *Student History* screen for a selected student, and to move or copy a student from the *Roster* to the *Drop-in Screen*.

The screen displays the type of appointment, the appointment date and time, and the advisor. It also includes the position of each student (the order in which they were added to the group activity), Student Name, Student ID, Birth Date, Phone, and the Attendance status. The Roster will default to the position order in which the student was added to the Roster; however, you can click on the Student Name header to have the Roster displayed alphabetically by Student Name. Here is an example of the *Roster*.

Roster	
Option	**Description**
Maximum Students Allowed	Displays the total number of students that may be scheduled for a specific group appointment.
Change	If enabled, the user may change the maximum number of students allowed in the specific group appointment.
Spaces Remaining	Displays the number of students that may still be scheduled for a specific group appointment.
[Reason Codes]	Use to select one or more reasons for making the appointment.
Comments	Use to enter specific information about the reason for making an appointment.
Room Number	Use to specify the room number for this group appointment.
Cancel Student(s)	Use to cancel one or more students from the group appointment.
Copy	Use to copy a student to another appointment slot while retaining the student in the current appointment.
Move	Use to move a student who is scheduled in the group appointment to another appointment cell.
Send to Drop-in Screen	Use to either copy or move a selected student on the Roster to the Drop-in Screen for a drop-in visit.

Roster	
Option	**Description**
Additional Information	[Available if the Location has opted to include this feature and if the user has been given permission] Use to view and, if permitted, to record responses to pre-established questions that will provide more information about the student.
Student History	Use to gain access to the Student History screen containing a student's appointment and drop-in history, as well as all eAdvising questions that have been answered.
Reprint Confirmation	Use to print an appointment confirmation at a later time.
Attended	[Activated after the appointment has been committed] Use to record whether a student attended a scheduled appointment.
Export Roster	Use to export the Roster to an external source.
Print	Use to initiate printing of the Roster.
Email	Use to send an email to a student on the Roster.
Text	Use to send a text message to a student on the Roster.
Notepad	[Available if the user has been granted Notepad Access permission] Use to gain access to the Notepad.

6.2.1   View, Print and Save the Roster

1.   From THE GRID or MY GRID, double-click on the time slot containing the group appointment. (If the appointment is at capacity, the *Roster* will be displayed immediately. Skip to step 3.)

2.   On the *Student Appointment Screen*, click **Roster**.

3.   To print the list of students who are registered for the activity, click **Print.** The following dialog box will be displayed:

Student Roster Report		
Option		**Description**
Include Data Elements	Student ID	Use to include the student IDs on the Roster report.
	Position	Use to display students on the Roster in the numerical order in which they were added to the Roster.
	Phone Number	Use to include the student phone numbers on the Roster report.
	Reason Code(s)	Use to include the reason code(s) on the Roster report.
	Date Added	Use to include the date and time that each student was added to the Roster.
	Birth Date	Use to include student birth dates on the Roster report.
	Attendance Status	Use to include attendance status on the Roster report.
	Comments	Use to include specific information about the reason(s) for the group appointment on the Roster report.
Sort Options	Order Entered	Use to sort the report based on the order in which the students were added to the Roster
	Student Name	Use to sort the report alphabetically by student name.
View		Use to view the Roster report prior to, or in lieu of, printing.
Save		Use to save the report to a file.

4. The Data Elements and Sort Options are pre-set, but they may be changed. To make any changes,

    a. In the Include Data Elements panel, click on one or more of the desired data elements.

    b. In the Sort Order panel, click either **Order Entered** to sort the report in the order in which students were added to the *Roster*, or **Student Name** to sort the report alphabetically by name.

    Note
    Any user-made changes will be stored as cookies so that the settings will remain when opening the screen in the future. However, the user-applied settings will revert to the pre-set defaults whenever cookies are removed from the cache.

5. To view or print the report, click **View**. The report is displayed in a pdf format utilizing the pdf viewer that is installed on your system. Paper copies can then be printed from that screen.

6. Click **Save** to save the report to a file. Here is an example of the Roster Report:

Roster

James Monroe

1/5/2015 at 8:30 AM

Orientation

Student Center, 2nd Floor

Student Name	ID	Pos.	Birth Date	Phone Number	Attend
HERSHEY, HAROLD	0000009	1	09/19/1994	(415) 987-2314	Y
SNICKERS, SAMUEL	0000002	2	12/12/1992	(415) 212-6235	Y
MUSKETEERS, MARY	0000005	3	05/15/1994	(415) 262-6257	Y
DOVEBAR, DEBRA	0000003	4	08/18/1994	(415) 408-2636	Y
BUTTERFINGER, BARBARA	0000008	5	08/18/1994	(415) 257-8540	Y
BABY, RUTH	0000007	6	07/17/1994	(415) 765-4231	Y
GOODBAR, GEORGE	0000004	7	04/14/1994	(415) 404-5423	Y
ALMOND, JOY	0000006	8	06/16/1994	(415) 615-5624	N
CLARKBAR, CHERRY	0000001	9	01/11/1994	(415) 415-3922	Y
LICORICE, LAWRENCE	3000000	10	12/26/1992	(707) 550-1237	Y
FUDGE, FRANK	6000000	11	09/19/1990	(510) 762-3466	Y
SMITH, JOHN	1111111	12	01/11/1995	(510) 734-9924	Y

Total number of students registered: 12

Total number of students who attended: 11

Total number of students who did not attend: 1

Printed: 2/18/2015 2:51:17 PM   - 1 -   Location: ADVISING

6.2.2   Change the Maximum Number of Students Allowed in a Group Appointment

1. On THE GRID or MY GRID, double-click on the time slot containing the group appointment.

2. If the appointment is not full, the *Student Appointment Screen* will be displayed. (If the appointment is at capacity, the Roster will be displayed immediately. Skip to step 4.)

3. On the *Student Appointment Screen*, click **Roster**.

4. Click **Change**, which is adjacent to the field entitled Maximum Students Allowed. The screen will now display a Change Maximum Students Allowed panel. Here is an example:

5.   Click the **Maximum** field and type in a new number.

6.   Click **OK**.

6.2.3   Export the Roster

In addition to previewing and printing the *Roster* within the SARS Anywhere application, an option exists to export the *Roster* to a .CSV file.

1.   From the *Roster*, click **Export Roster**. The following prompt will be displayed at the bottom of the screen:

2.   Click **Open**. The report will be available for use in the .CSV format.

     -or-

3.   Click **Save**. A menu will be displayed with the following options: **Save**, **Save As**, and **Save and Open**. Select the desired option and proceed according to the prompts.

6.3   Schedule an Appointment

An individual appointment is any scheduled activity that is attended by a single student. A group appointment is any scheduled activity that may be attended by more than one individual. Examples of group appointments are orientation sessions, workshops, and testing sessions.

To schedule an appointment the following minimum information is needed: the student's identifier and first and last name, and, if Reasons are required, the reason(s) for the appointment. If a student cannot remember the name of the advisor with whom previous appointments were scheduled, use Student History to obtain that information.

1.   Place the focus on the tab labeled THE GRID or the tab labeled MY GRID.

2.   Note the Flyout menu [**Name > Location > Day > Date▼**]. To make any changes, click on the Flyout menu to display a selection screen.

     a.   If needed, click **Location ▼** and select the Location in which the appointment is to be scheduled.

     b.   In the <u>Date</u> panel, note that a date picker offers the opportunity to navigate to a selected month and year, to click on a specific date on the calendar, or to select today by clicking on **Today**.

     c.   [If using THE GRID] If needed, click **Short Name ▼** and select the advisor whose schedule is to be displayed on THE GRID for a series of days.

d.   If **ALL** is the desired selection and you wish to refine the list to only those advisors who are associated with a specific specialty, click **Specialty ▼** and select the desired specialty.

e.   Move the cursor away from the selection panel to return to THE GRID or MY GRID view.

3.   Double-click anywhere in the time slot containing the available appointment (individual or group) to display the *Student Appointment Screen*.

4.   [Required] Select one of the options below to enter the student's identifier.

a.   Type the student's identifier in **Student ID** (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID).

b.   If the student's identifier is not known, type the student's name or a portion thereof in **Name** and click **Search**. If matches are not found in the database, a notification message will be displayed. If only one match is found in the SARS database, the student's identifying information will be displayed. If more than one match is found, a list of all students with that name will appear on a *Search Results* screen. From the *Search Results* screen,

i)   Click the selected name.

ii)   Click **OK**.

c.   If the individual does not have an identifier, click the pencil icon ✐ to automatically change the ID field to the Guest ID format and to generate a temporary identifier with **SG** as the leading characters. The action will enable the Student Name field. Here is an example of the *Student Appointment Screen* after the pencil icon has been used to generate a guest ID (see Section 6.1). Note that the pencil icon disappears after it has been used.

5. [Required] If the **Name** field is not populated automatically after entering the Student ID, type the student's last name, first name (for example, Smith, John). The last name first method will render reports sorted by student names more usable. To create greater flexibility, click **+**. This will open a screen that provides an option to separate the student's name into separate fields. Nicknames may be entered in the Preferred Name field. In the case of a guest ID, the drop down name field will open automatically and completion of the fields will be required.

6. Complete the remaining fields in the Student Information panel, if needed.

    a. In the **Birth Date** field, type the student's birth date or use the date picker to select the student's birth date (see "Date Picker" at Appendix B).

    b. Note the **Home Phone** and related **Extension** fields to verify that the information is correct. Generally, this information is imported from the college's database. If it is necessary to enter a phone number manually, see step c, below.

    c. In the **Contact Phone** field, type the student's preferred contact telephone number, if different from the Home Phone. Also type any extension in the related **Extension** field, which will accept up to 20 characters. This phone number typically will not be affected by imports from the college database.

    d. In the **Text Phone** field, type the student's text phone number, if the student has a cell phone with text messaging capabilities.

        Note
        The text option will be usable only if the college has a valid license for text messaging.

    e. Click the **Email** field and type the student's primary email address.

    f. Click the **Email 2** field, if allowed, and type the student's preferred email address.

7. In the Appointment Information panel,

a. [Required entry, if "Require Reason" is established for the Location] Click the selected
    Reason(s) for the appointment. (Use the scroll bar if the list extends beyond the viewable screen
    or click the **+** sign adjacent to the Reason Code label to display a screen showing all available
    Reason Codes.) Here is an example:

Notes
Some systems may be set to Allow Multiple Reason Codes.

If Use Student Classes has been activated in SARS Anywhere Admin, a *Course Selection* screen
will be displayed after the student's ID is entered. The screen will list all the classes in which the
student is currently enrolled. Typically, this feature is used by labs or tutoring centers. Click one
or more classes to indicate the reason(s) for the appointment or visit.

If the selected Reason Code requires a longer duration than that allowed by the single time slot, a
warning message will be displayed. The user may opt to extend the appointment or ignore the
prompt, as desired.

b. [Optional] In the **Comments** field, enter specific information about the reason(s) for making the
    appointment. The field will accept up to 255 characters.

c. [Optional] In the **Room Number** field, enter or edit the room number for this appointment if it
    differs from that which is displayed. If this is a group appointment and the room number field is
    blank or needs to be changed, click **Roster**, enter the room number, and then return to the
    Student Appointment Screen.

8. To extend or unextend the appointment, see "Extend and Unextend an Appointment" at Section 6.5.

9. Click **Opt In Settings** to display the *Opt In Settings* screen, if you want to verify or change the contact
    methods listed for the student. Here is an example.

a. Ensure that **Email**, **Phone**, and/or **Text**, are checked, as appropriate, to specify the contact methods for the student. If an option is disabled, the student does not have the contact method listed in the system, the college has not set up the option, and/or (in the case of text messaging) the college does not have a software license for that feature.

b. Click **OK** to save any changes, or click **Cancel** to exit the screen without saving.

c. Click **Yes** in response to the confirmation message.

10. In the Confirmation Options panel,

a. Ensure that **Email** is checked if you want to send an email confirmation for the appointment.

b. Ensure that **Print** is checked if you want to generate a paper confirmation for the appointment.

c. Ensure that **Text** is checked if you want to send a confirmation to the student via text messaging.

Note

If an appointment is being added using the Student Appointment Screen for an appointment that occurred in the past, the default confirmation options will be unchecked. This is to prevent appointment reminders from being generated automatically to students when the appointment has already occurred. If you wish to send an appointment confirmation to the student, you will need to manually check the desired confirmation method.

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11. If the student ID is already stored in the database, the following options may also be enabled:

a. *Additional Info* – depending on whether the system administrator has set it up for this Location (see Section 9).

b. *Alert* (see Section 10).

c. *Notepad* – if the user has access to the Notepad (see Section 16).

d. *Student History* (see Section 8).

e. *View Course List* – depending on whether courses are being used as Reasons.

12. If the "Show Term List" option has been selected by the system administration for the Location, a Term field will be available. The field will be populated by the current term or, if the appointment occurs between terms, it will display the next term. To link a topic for discussion in the appointment to a different term (e.g., discussion of an Ed Plan for the next semester), click **Term ▼** and select the desired Term. (Also see "Show Term List" in the SARS Anywhere Administration Manual at Section 6.6.)

13. Review the Info Flags panel to see whether important information about the student is listed (for example, completed key actions toward matriculation goals).

14. Click **Commit**.

a. [If initials are required] Enter your name or initials.

b. If the appointment might conflict with a pending appointment for this student in any Location, a warning screen will be displayed. To proceed with the action, click **Yes**. Otherwise, click **No** to abort the appointment and find another time slot.

Note
Users will be able to see the actual Location and Short Name for the conflicting appointment if they have scheduling permissions for that Location. If not, in order to preserve student confidentiality, users will see an asterisk (*) with the following message: "Details about the Location and Short Name are not available based on your permission level."

c. If Use Short Name Assignments has been activated by the system administrator and the appointment is being made with an advisor other than the advisor to whom the student has been assigned, a warning/confirmation message will be displayed. To proceed to make the appointment with the unassigned individual, click **Yes**. Otherwise, click **No** and return to THE GRID or MY GRID and make the appointment with the assigned individual.

Note
If you inadvertently click **Close** rather than **Commit**, the appointment information will not be discarded unless you confirm that you want to discard the appointment information.

Tip
If you did not print a confirmation before committing the appointment, double-click on the scheduled appointment to display the *Student Appointment Screen*; then click **Reprint Confirmation**. For a group appointment, first double-click on the group appointment to display the *Student Appointment Screen*, click **Roster**, click on the student's name, and then click **Reprint Confirmation**,

15. For a group appointment, repeat steps 4 - 14 to book other students in the same scheduling session. When done, click **Close**.

[For an individual appointment]   After booking the appointment, the booked appointment Schedule Code will appear in the selected time slot on THE GRID and MY GRID.

[For a group appointment] The Schedule Code that allows for a group appointment remains in the cell on THE GRID and MY GRID and the student is added to the *Roster*. For both types of appointments, the appointment record for the student will be added to Student History.

Notes

"Reserv" in a time slot normally indicates that the appointment is no longer available because it is in the process of being scheduled by any user or by the student via eSARS. Once the appointment is committed, "Reserv" is replaced with the booked appointment schedule code.

If you are in the process of scheduling an appointment and lose your connection to the web server or close the browser without logging out of SARS Anywhere, "Reserv" will continue to be displayed in the time slot for approximately 20 minutes, when it is removed by the system.

To resume scheduling the appointment, double-click on the time slot. In response to the message prompt, click **Yes.**

To remove "Reserv" without proceeding to schedule the appointment, double-click on the time slot. In response to the message prompt, click **No**.
-or-
Select **Quick Day Change** via the Tab or **Quick Links**. Select the replacement code and then click on the slot displaying "Reserv." Click **Save.** In response to the confirmation prompt, click **Yes.** Then click **X**. (See Use Quick Day Change to Change a Schedule" at Section 13.1.)

"Reserv" remaining in time slots after 20 minutes indicates that the Appointment Reset Service is not running, in which case IT should be contacted.

An occasional Saturday (or Sunday) may be added to THE GRID and MY GRID and made available for scheduling. (See "Add an Occasional Saturday or Sunday" in the SARS Anywhere Administration Manual, Section 17.11.)

6.4   Search for an Available Appointment Slot

1. From THE GRID or MY GRID, click **Quick Links ▼** and select **Search for Appointment**. An *Appointment Search* screen will be displayed:

2.   In the Day of Week panel, click on one or more days, or select **All.**

> **Note** The Date is typically left at All. However, users may wish to use this option to select a single, specific date to search for an appointment on that single date only. Generally, however, such an action is performed from THE GRID..

3.   Click **First Time Slot ▼** and select the earliest time slot that the student wishes an appointment to begin.

4.   Click **Last Time Slot ▼** and select the latest time slot that the student requests an appointment to begin.

5.   [Optional] Click **Specialty ▼** and select the desired specialty group (e.g., Honors) to limit the choices to that group.

6.   Click **Short Name ▼** and select the desired advisor.

7.   In the Schedule Code panel, click the specific **Schedule Code** (or more than one, or All) to search for the desired appointment allowable slots. If the Schedule Code is for an individual appointment, only available slots will be displayed.

8.   Click **Find** to display a list of available appointments that will satisfy the selection criteria.

Here is an example of a search for available appointment slots for all advisors between 9:00 am and 10:00 am.

Tip
To find two or more consecutive time slots for the same advisor, click **Short Name ▼** to display a sort order menu. Then select **Sort Ascending** or **Sort Descending** to alphabetize the results criteria by advisor name. To restore the sort order by date and time, click **Remove Sort**.

9.   Double-click on the selected entry from among those listed. The *Student Appointment Screen* will appear.

10. Enter the applicable information on the *Student Appointment Screen*. Click **Commit**. If required, enter your name or initials in response to the prompt and then press **Enter** or click **Yes** to return to the *Appointment Search* screen.

11. Click **Reset Criteria** to clear the screen and select other criteria,, or click the **X** to close the screen.

6.5   Extend and Un-extend an Appointment

The length of an appointment may be lengthened when the time slot(s) below are appointment allowable.

The preferred method for extending an individual appointment is when it is being initially scheduled. However, an individual booked appointment may also be extended after the fact.

Some group appointment Schedule Codes (e.g., WORKSHOP) may have varying durations. When setting up the system, it was recommended that such Schedule Codes be assigned the shortest likely duration, because the specific activity may later be extended. Thus, from time to time, you may need to extend a group appointment.

6.5.1   Extend

1.   [For individual booked appointments] From THE GRID or MY GRID,

     a.   Double-click on the time slot containing the open appointment or the booked appointment to
          display the *Student Appointment Screen*. Then click **Extend**. Repeat as necessary.
          -or-

     b.   Click on the time slot and then click **Quick Links ▼**. Then select **Extend Appointment** and
          repeat as necessary.

2.   [For group appointments] From THE GRID or MY GRID:

     a.   Click to place the focus on the time slot that contains the group appointment.

     b.   Click **Quick Links ▼** and select **Extend Appointment**.

     c.   Repeat as necessary.

Tip
Remember to reprint the confirmation if appointment confirmations have been configured to display both
start and stop times.

6.5.2   Unextend

An extended appointment may be shortened one time slot at a time.

1.   [For individual booked appointments] From THE GRID or MY GRID, double-click on the time slot
     containing the booked appointment to display the *Student Appointment Screen.*

     a.   Click **Unextend**.

     b.   Repeat as necessary.

2.   [For individual booked appointments and group appointments] From THE GRID or MY GRID,

     a.   Click to place the focus on the time slot that contains the appointment.

     b.   Click **Quick Links ▼**. Then select **Unextend Appointment** and repeat as necessary.

Depending upon the option selected by your Location, either the Schedule Code that previously resided
in the time slot on THE GRID and MY GRID for an individual appointment will be returned, or the
Replacement Code will be inserted in the time slot.

6.6   Move a Student From a Booked Appointment

A student may be moved from one group appointment to another, from a group appointment to an
individual appointment, or from an individual appointment to a group appointment within the same
Location. However, the receiving time slot must have a duration that is at least the same length as the
original time slot and be appointment-allowable.

6.6.1   Move from an Individual Appointment

1. On THE GRID or MY GRID, click on the time slot that contains the scheduled appointment.

    Tip
    The booked appointment tool tip will display the student's name, the student's identifier, the Reason Codes(s) for the appointment, or some combination of the above, depending on the tool tip setting established for the Location.

2. Click **Quick Links ▼** and select **Move Appointment**. The cursor will change to display the word "Move" and the time slot Schedule Code will change to "Moving."

    Tip
    To cancel the move action and retain the original appointment,
    i)   Double-click on the "Moving" time slot and select **Cancel** in response to the message.
         -or-
    ii) Click **Quick Links ▼** and select **Stop Move Appointment**.

3. Double-click on the time slot to which the appointment is to be moved.

4. When the *Move Confirmation* screen appears,

    a. [If initials are required] Enter your name or initials.

    b. Ensure that **Email** is checked if you want to send an email confirmation for the appointment. (If the student does not have an email address, the Email option will be disabled

    c. Ensure that **Print** is checked if you want to generate a paper confirmation for the appointment.

    d. Ensure that **Text** is checked if you want to send a text message for the appointment. (If the student does not have a text phone or the college does not have the text messaging software license, the Text option will be disabled.)

    e. Click **Yes**.

6.6.2   Move from a Group Appointment

1. On THE GRID or MY GRID, double-click on the time slot containing the group appointment to display the *Student Appointment Screen*. (If the appointment is at capacity, the *Roster* will appear immediately. Skip to step 3.)

2. Click **Roster**. The students who are scheduled for the appointment will be listed in the order in which they were added to the Roster.

3. Click on the student for whom the appointment is being moved.

4. Click **Move**. THE GRID or MY GRID will be displayed. The cursor will change to display the word "Move" and the time slot Schedule Code will change to "Moving."

    Tip
    To cancel the move action and retain the original appointment,
    i)   Double-click on the "Moving" time slot and select **Cancel** in response to the message.
         -or-
    ii) Click **Quick Links ▼** and select **Stop Move Appointment**.

5.   Double-click on the time slot to receive the student.

Tip
The tool tip for the receiving time slot will indicate if a space is available. To accommodate a different number of students for this group appointment, use the Change feature on the Roster. (See "Change the Maximum Number of Students Allowed in a Group Appointment" at Section 6.2.2. Then return to the target time slot and resume scheduling the appointment.)

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6.   When the *Move Confirmation* screen appears,

  a.   [If initials are required] Enter your name or initials.

  b.   Ensure that **Email** is checked if you want to send an email confirmation for the appointment. (If the student does not have an email address, the Email option will be disabled.)

  c.   Ensure that **Print** is checked if you want to hand out a written confirmation.

  d.   Ensure that **Text** is checked if you want to send a text message for the appointment. (If the student does not have a text phone or the college does not have the text messaging software license, the Text option will be disabled.)

  e.   Click **Yes**. The appointment will be moved to the new time slot on THE GRID or MY GRID.

Note

"Moving" in a time slot normally indicates that the appointment is no longer available because it is in the process of being moved. Once the appointment is committed, "Moving" is replaced with the original group appointment Schedule Code.

If you are in the process of moving an appointment and lose your connection to the web server or close the browser without logging out of SARS Anywhere, "Moving" will continue to be displayed in the time slot for approximately 20 minutes, when it is removed by the system.

To resume moving the appointment, double-click on the "Moving" time slot. In response to the message prompt, click **Yes.**

To remove "Moving" without proceeding to move the appointment, double-click anywhere within the "Moving" time slot. In response to the message click **No**.
-or-
With the focus anywhere within the "Moving" time slot, click **Quick Links ▼** and select **Stop Move Appointment**.

"Moving" remaining in time slots after 20 minutes indicates that the Appointment Reset Service is not running, in which case IT should be contacted.

6.7   Move a Group Appointment to another Time Slot

A group appointment Schedule Code and all of the appointments booked for that activity may be moved in their entirety to another date and/or time within the same Location, provided that at least one student is already booked for this activity.

1.   On THE GRID or MY GRID, click on the time slot that contains the group activity.

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2. Click **Quick Links ▼** and select **Move Appointment**. The cursor will change to display the word "Move" and the time slot Schedule Code will change to "Moving."

Tip
To cancel the move action and retain the original group appointment,
i)   Double-click on the "Moving" time slot and select **Cancel** in response to the message.
       -or-
ii) Click **Quick Links ▼** and select **Stop Move Appointment**.

---

3. Double-click on the time slot to which the activity is to be moved.

4. When the *Move Confirmation* screen appears,

   a. [If initials are required] Type your name or initials.

   b. Ensure that **Email** is checked if you want to send email confirmations of this moved group appointment to each student on the roster who has an email address and has opted to receive email confirmations.

   c. Ensure that **Print** is checked if you want to hand out written confirmations.

   d. Ensure that **Text** is checked if you want to send text confirmations of this moved group appointment to each student on the roster who has a text phone and has opted to receive text confirmations. If the student does not have a text phone or the college does not have the text messaging software license, the Text option will be disabled.

   e. Click **Yes**. The activity will be moved to the new time slot on MY GRID. Depending upon the option selected by your college, either the former Schedule Code or the Replacement Code will be inserted in the time slot that previously contained the group activity

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Note

"Moving" in a time slot normally indicates that the appointment is no longer available because it is in the process of being moved. Once the appointment is committed, "Moving" is replaced with the original group appointment Schedule Code.

If you are in the process of moving an appointment and lose your connection to the web server or close the browser without logging out of SARS Anywhere, "Moving" will continue to be displayed in the time slot for approximately 20 minutes, when it is removed by the system.

To resume moving the appointment, double-click anywhere within the "Moving" time slot. In response to the message prompt, click **Yes.**

To remove "Moving" without proceeding to move the appointment, double-click anywhere within the "Moving" time slot. In response to the message prompt, click **No**.
-or-
With the focus anywhere within the "Moving" time slot, click **Quick Links ▼**and select **Stop Move Appointment**.

"Moving" remaining in time slots after 20 minutes indicates that the Appointment Reset Servicer is not running, in which case IT should be contacted.

6.8   Copy a Scheduled Appointment

A student appointment may be copied to and from another individual or group appointment slot for the same Location. However, the receiving time slot(s) must have a duration that is at least the same length as the original time slot. The copy function retains the student in the original appointment.

6.8.1   Copy from an Individual Appointment

1. On THE GRID or MY GRID, click on the time slot that contains the scheduled appointment.

> **Tip**
> The booked appointment time slot tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tool tip setting established for the Location.

2. Click **Quick Links ▼** and then select **Copy Appointment**. The cursor will change to display the word "Copy" and the time slot Schedule Code will change to "Copying."

> **Tip**
> To cancel the copy action and retain the original appointment,
> i)   Double-click on the "Copying" time slot and select **Cancel** in response to the message.
>   -or-
> ii) Click **Quick Links ▼** and select **Stop Copy Appointment**.

3. Double-click on the appointment time slot to receive the student. (Either a group or individual appointment time slot may be selected.)

4. When the *Copy Confirmation* screen appears,

    a. [If initials are required] Type your name or initials.

    b. Ensure that **Email** is checked if you want to send an email confirmation for the appointment. (If the student does not have an email address, the Email option will be disabled.)

    c. Ensure that **Print** is checked if you want to generate a paper confirmation for the appointment.

    d. Ensure that **Text** is checked if you want to send a text message for the appointment. (If the student does not have a text phone or the college does not have the text messaging software license, the Text option will be disabled.)

    e. Click **Yes**. The appointment will be copied to the new time slot on THE GRID and MY GRID, or in the case of a group appointment, the student will be added to the Roster.

5. To copy more appointments for the <u>same</u> student, repeat step 3.

6. When done copying, click **Quick Links** and select **Stop Copy Appointment**.

6.8.2   Copy from a Group Appointment

1. On THE GRID or MY GRID, double-click on the time slot containing the group appointment to display the *Student Appointment Screen.* (If the appointment is at capacity, the Roster will appear immediately. Skip to step 3.)

2. Click **Roster**. The students who are scheduled for the appointment will be listed in the order that they were added to the Roster.

3. Click on the student to be copied to another appointment.

4. Click **Copy**. The cursor will change to display the word "Copy" and the time slot Schedule Code will change to "Copying."

    Tip
    To cancel the copy action and retain the original appointment(s),
    i)   Double-click on the "Copying" time slot and select **Cancel** in response to the message.
         -or-
    ii) Click **Quick Links** ▾and select **Stop Copy Appointment**.

5. Double-click on the appointment time slot to receive the student. (Either a group or individual appointment time slot may be selected.)

6. When the *Copy Confirmation* screen appears,

    a. [If initials are required] Enter your name or initials.

    b. Ensure that **Email** is checked if you want to send an email confirmation for the appointment. (If the student does not have an email address, the Email option will be disabled.)

    c. Ensure that **Print** is checked if you want to generate a paper confirmation for the appointment.

    d. Ensure that **Text** is checked if you want to send a text message for the appointment. (If the student does not have a text phone or the college does not have the text messaging software license, the Text option will be disabled.)

    e. Click **Yes**. The appointment will be copied to the new time slot on THE GRID and MY GRID or in the case of a group appointment, the student will be added to the Roster.

7. To make more appointments for the same student, repeat steps 5 - 6.

8. When done copying, click **Quick Links** and select **Stop Copy Appointment**.

Notes

"Copying" in a time slot normally indicates that the appointment is no longer available because it is in the process of being copied. Once the appointment is committed, "Copying" is replaced with the original group appointment Schedule Code.

If you are in the process of copying an appointment and lose your connection to the web server or close the browser without logging out of SARS Anywhere, "Copying" will continue to be displayed in the time slot for approximately 20 minutes, when it is removed by the system.

To resume copying the appointment, double-click anywhere within the "Copying" time slot. In response to the message prompt, click **Yes.**

To remove "Copying" without proceeding to copy the appointment, double-click anywhere within the "Copying" time slot. In response to the message prompt, click **No**.
-or-
With the focus anywhere within the "Copying" time slot, click **Quick Links** ▾and select **Stop Copy Appointment**.

"Copying" remaining in time slots after 20 minutes indicates that the Appointment Reset Service is not running, in which case IT should be contacted.

6.9   Copy a Group Appointment to Another Group Time Slot

All students in a group appointment may be copied to another group appointment within the same Location. The copy function retains the students in the original group activity, as well.

1. On THE GRID or MY GRID, click on the time slot containing the group appointment that is to be copied.

2. Click **Quick Links ▼** and select **Copy Appointment**. The cursor will change to display the word "Copy" and the time slot Schedule Code will change to "Copying."

Tip
To cancel the copy action and retain the original group appointment,
i)   Double-click on the "Copying" time slot and select **Cancel** in response to the message.
     -or-
ii) Click **Quick Links ▼**and select **Stop Copy Appointment**.

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3. Double-click on the group appointment slot that will be receiving the copied information.

4.   When the *Copy Confirmation* screen appears,

    a. [If initials are required] Enter your name or initials.

    b. Ensure that **Email** is checked if you want to send an email confirmation for the appointment. (If the student does not have an email address, the Email option will be disabled.)

    c. Ensure that **Print** is checked if you want to generate a paper confirmation for the appointment.

    d. Ensure that **Text** is checked if you want to send a text message for the appointment. (If the student does not have a text phone or the college does not have the text messaging software license, the Text option will be disabled.)

    e. Click **Yes**. All students that were registered for the initial appointment, as well as the associated Reason Code(s), will be placed in the new group appointment slot, with the following exceptions:

        i)   If a student name from the copied appointment already exists in the receiving appointment, it will not be copied.

        ii) If the receiving appointment does not have enough slots remaining to accept all of the students being copied, none of the students will be copied. In such a case, the maximum number of students allowed may be increased on the *Roster*, or the user may select another group time slot that is able to accept the number of students scheduled in the group appointment.

5. When done copying, click **Quick Links ▼** and select **Stop Copy Appointment**.

Note

"Copying" in a time slot normally indicates that the appointment is no longer available because it is in the process of being copied. Once the appointment is committed, "Copying" is replaced with the original group appointment Schedule Code.

If you are in the process of copying an appointment and lose your connection to the web server or close the browser without logging out of SARS Anywhere, "Copying" will continue to be displayed in the time slot for approximately 20 minutes, when it is removed by the system.

To resume copying the appointment, double-click anywhere within the "Copying" time slot. In response to the message prompt, click **Yes.**

To remove "Copying" without proceeding to copy the appointment, double-click anywhere within the "Copying" time slot and select **Cancel.** In response to the message prompt, click **No**.
-or-
With the focus anywhere within the "Copying" time slot, click **Quick Links** ▼and select **Stop Copy Appointment**.

"Copying" remaining in time slots after 20 minutes indicates that the Appointment Reset Service is not running, in which case IT should be contacted.

6.10   Send a Student to the Drop-in Screen

Users may either move students with a scheduled appointment to the Drop-in Screen for a drop-in visit or copy them to the Drop-in Screen. Moving a student will remove that name from THE GRID and MY GRID, whereas copying a student will retain the name on the Drop-in Screen list, as well as THE GRID and MY GRID. The Drop-in feature is discussed at Section 7.

1.   On THE GRID or MY GRID, click on the time slot that contains the scheduled appointment.

> **Tip**
> The booked appointment time slot tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tool tip setting established for the Location.

2.   For an individual appointment, click **Quick Links** ▼ and select **Send to Drop-in Screen**.

3.   For a group appointment, from the *Roster*, click on the student name to be copied or moved. Then click **Quick Links** ▼ and select **Send to Drop-in Screen**. Here is an example of the screen:

Send to Drop-in Screen		
Option		**Description**
Appointment Information	Reason Code(s)	Use to select the reason associated with the drop-in visit.
	Location	Use to select the Drop-in Location.
	Advisor	Use to select the advisor to which the student should be referred, or select Next for the student to see the next available advisor.
	Comments	Use to type in any relevant comments.
Action	Copy	Use to transfer a selected student from MY GRID to the Drop-in Screen for a drop-in visit while retaining the student's individual appointment.
	Move	Use to transfer a selected student from MY GRID to the Drop-in Screen for a drop-in visit without retaining the student's individual appointment.
OK		Use to complete the action.
Close		Use to exit the screen.

4. In the Reason Code(s) field, click on the desired Reason Code.

5. Click **Location ▼** and select the drop-in Location.

6. Click **Advisor ▼** and select either **Next** to have the student see the next available advisor, or click on the name of the advisor that the student should see.

7. Click **Comments** and type in any relevant comments.

8. To place the student on the Drop-in Screen while retaining that student's individual appointment on THE GRID and MY GRID,

    a. Click **Copy**. A confirmation message will be displayed.

    b. Click **Yes**.

9. To send the student to the Drop-in Screen and also remove that student's appointment on THE GRID and MY GRID,

    a. Click **Move**. A confirmation message will be displayed.

    b. Click **Yes**.

6.11   Send Email to a Student with a Booked Appointment (MY GRID)
[under development]

6.12   Send Text Message to a Student with a Booked Appointment (MY GRID)
[under development]

6.13   Change Information about an Appointment

You may be able to change all the information on the *Student Appointment screen* <u>except</u> for the identifier, depending on the permissions granted. To change the student's ID, use the *Student Maintenance* screen. (See "Student Maintenance" at Section 19.)

6.13.1 Change Reason Codes

1.   On THE GRID or MY GRID, for an individual appointment, double-click anywhere on the time slot that contains the scheduled appointment. The information that was previously entered for that appointment will be displayed on the *Student Appointment Screen*.

     -or-

2.   On THE GRID or MY GRID, for a group appointment, double-click on the time slot containing the appointment. If the appointment is not full, the *Student Appointment Screen* will be displayed.

     Note
     If the appointment is at capacity, the Roster will be displayed immediately. Skip to step b, below.

     a.   Click **Roster**.

     b.   Click on the selected student name to display the *Student Appointment Screen*.

3.   Change the information as desired. Specifically, to change Reason Codes,

     a.   Click on any reasons to be de-selected.

     b.   Click on any reasons to be added.

4.   Click **Close.** A confirmation message will be displayed.

5.   Click **Yes**.

6.13.2 Set the Actual Start and Stop Times for Individual Booked Appointments
          [Under development]

6.14   Cancel an Appointment

If a student cannot remember the appointment date or time, click **Student History**. Enter the student's ID or name. Click **Just Appointments**. Then double-click on the appointment to be canceled to display the *Student Appointment Screen.*

6.14.1   Cancel an Individual Appointment

1. On THE GRID or MY GRID, double-click anywhere on the time slot that contains the scheduled appointment. The information that was previously entered for that appointment will be displayed on the *Student Appointment Screen.*

Tip
The booked appointment time slot tool tip will display the student's name, the student's ID, the Reason Code(s) for the appointment, or some combination of the above, depending on the tool tip setting established for the Location.

---

2. In the Reason Code field, select a Reason Code that explains why the appointment was cancelled. (Use the scroll bar if the list extends beyond the viewable screen or click the **+** sign adjacent to the Reason Code label to display a screen showing all available Reason Codes.)

3. Click **Cancel.** A confirmation screen will be displayed.

    a.   If your name or initials are required, type them in the space provided on the Cancellation Confirmation screen, then click **Yes**.

         -or-

    b.   If your name or initials are not required, simply click **Yes**.

Note If the appointment is one of several booked as a recurring appointment, a *Remaining Recurring Appointments* screen will be displayed listing all related recurring appointments. Select any other recurring appointment(s) that you want to cancel and click **Proceed**.

The appointment will be cancelled, and a cancellation record for the student will be added to Student History. Depending upon the option selected by your Location, either the Schedule Code that previously resided in that cell on THE GRID and MY GRID will be returned or the Replacement Code will be inserted in the cell.

Note
If an appointment is cancelled within five minutes of its initial booking, the user will be <u>required</u> to enter his or her full User Name (not just initials) to confirm the cancellation. That User Name must match the User Name of the person whose sign-in was current at the time the appointment was booked.

6.14.2   Cancel a Group Appointment

1. On THE GRID or MY GRID, double-click anywhere in the time slot containing the group appointment,

2. If the appointment has open slots, the *Student Appointment Screen* will be displayed. If the appointment is at maximum capacity, the *Roster* will be displayed immediately, so skip to step 3.

---

3. From the *Student Appointment Screen*, click **Roster**. The students who are scheduled for the appointment will be listed in the order in which they were added to the Roster.

4. To cancel the appointment for one or more (but not all) students on the list:

   a. While pressing the Control (CTRL) key, click on each student for whom the appointment is being cancelled.

      Note

      To cancel all students on the *Roster*, highlight the first name, then while pressing the Shift key simultaneously, click on the last name to be cancelled. Then proceed to the next step.

   b. In the Reason Code panel, select a Reason Code representing the reason for the cancellation. (Use the scroll bar if the list extends beyond the viewable screen or click the **+** sign adjacent to the Reason Code label to display a screen showing all available Reason Codes.)

   c. Click **Cancel Student(s)**. A confirmation screen will be displayed.

   d. If your name or initials are required, type them in the space provided on the *Cancellation Confirmation* screen, then click **Yes**.

      -or-

   e. If your name or initials are not required, simply click **Yes**.

   Note If the appointment is one of several booked as a recurring appointment, a *Remaining Recurring Appointments* screen will be displayed listing all related recurring appointments. Select any other recurring appointment(s) that you want to cancel and click **Proceed**.

   The appointment(s) will be cancelled, and a cancellation record for the student will be added to Student History. The Schedule Code that allows for a group appointment will remain in the time slot on THE GRID and MY GRID, and the cancelled slot will become available for another student.

   Note

   If an appointment is cancelled within five minutes of its initial booking, the user will be required to enter his or her User Name (not just initials) to confirm the cancellation. That User Name must match the User Name of the person whose sign-in was current at the time the appointment was booked.

6.15 Make Recurring Appointments

A simple method exists for scheduling multiple, recurring appointments for one advisor at a time. Scheduling recurring appointments is useful for advisors or other staff who see students for appointments on a regular basis.

Two methods exist for scheduling recurring appointments:
   * Using the Recurring Activities option
   * Using the Copy function (see Section 6.8)

1. From THE GRID or MY GRID, click **Quick Links ▼** and select **Recurring Activities**.

Here is an example of the left-hand side of the screen for <u>Weekly</u> recurrences with Appointment selected:

Here is an example of the left-hand side of the screen for <u>Monthly</u> recurrences with Appointment selected:

Recurring Activities			
Option		**Description**	
Activity Information	Type	Appointment	Use to select the option to schedule a recurring appointment.
		Meeting	Use to select the option to schedule a recurring meeting.
	Short Name	Use to select the advisor for whom a recurring appointment is to be scheduled.	
	Start Time	Use to select the time at which the recurring appointment will begin.	
	Duration	Use to select the length of time needed for the recurring appointment.	
	Start Date	Use to select the earliest date for which the recurring appointment will be scheduled.	
	Stop Date	Use to select the latest date for which the recurring appointment will be scheduled.	
Recurrence	Frequency	Weekly	Use to schedule a weekly appointment.
		Monthly	Use to select the option to schedule a monthly appointment.
	[Weekly] Every ☐ Weeks(s)	Use with the Weekly option to select the frequency of the weekly appointment to be scheduled.	
		Sunday	Use to schedule the appointment on a Sunday.
		Monday	Use to schedule the appointment on a Monday.
		Tuesday	Use to schedule the appointment on a Tuesday.
		Wednesday	Use to schedule the appointment on a Wednesday.
		Thursday	Use to schedule the appointment on a Thursday.
		Friday	Use to schedule the appointment on a Friday.
		Saturday	Use to schedule the appointment on a Saturday.
	[Monthly] Every ☐ [occurrence]	Use with the Monthly option to select the occurrence of the Monthly appointment to be scheduled.	
		1st	Use to schedule the appointment on the first specified day of the month.
		2nd	Use to schedule the appointment on the second specified day of the month.
		3rd	Use to schedule the appointment on the third specified day of the month.

Recurring Activities			
Option		**Description**	
		4th	Use to schedule the appointment on the fourth specified day of the month.
		Last	Use to schedule the appointment on the last specified day of the month.
Find		Use to have the system search for available dates based on the selected criteria and display the results.	
Reset		Use to clear the Recurrence panel for new entries.	
Results		Used to display the number of occurrences for the selected date range for the criteria selected.	
Details		Use to display all details for a selected result.	
Book		Use to book the selected date for the appointment.	

2.   In the Activity Information - Type panel,

    a.   Click **Appointment.**

    b.   Click **Short Name ▼** and select the name of the advisor for whom the recurring appointments are to be scheduled.

    c.   Click **Start Time ▼** and select the time at which the recurring appointment will begin.

    d.   Click **Duration ▼** and select the length of time needed for the appointment.

    e.   Click the **Start Date** field and type in the first date on which a recurring appointment will be scheduled, or use the Date Picker. (See "Date Picker" in Appendix B.)

    f.   Click the **Stop Date** field and type in the last date on which a recurring appointment will be scheduled, or use the Date Picker.

3.   In the Recurrence panel,

    a.   Click **Weekly** to schedule the appointment on a weekly basis. Then,

        i)   Click **Every ☐ Week(s)** and type in the frequency of the weekly appointment.

        ii)   Click the specific day(s) of the week on which the weekly appointment will be scheduled. More than one day may be selected.

        [**Example**: Selecting **Weekly > Every 2 Weeks > Monday** will return results for every other Monday, starting the next Monday that occurs after today.]

    -or-

    b.   Click **Monthly** to schedule the appointment on a monthly basis. Then,

        i)   Click the applicable checkbox adjacent to **Every 1ˢᵗ**, **2ⁿᵈ**, **3ʳᵈ**, **4ᵗʰ**, or **Last** to specify the day of the month the appointment is to be scheduled.

ii)   Click the specific day(s) of the week on which the monthly appointment will be scheduled. More than one day may be selected.

[**Example**: Selecting **Monthly > 2nd > Monday** will return results for the second Monday of every month, starting the next second Monday.]

4.   Click **Find**. The Results panel will display the total number of occurrences for the selected date range and day of week. Here is an example.

Recurring Activities

Activity Information

Type
○ Appointment   ○ Meeting

Short Name
ADAMS

Start Time   Duration
10:00 AM   30

Start Date   Stop Date
09/14/2015   12/11/2015

Recurrence

Frequency
● Weekly   ○ Monthly

Every 1   week(s)

☐ Sunday   ☑ Monday
☐ Tuesday   ☐ Wednesday
☐ Thursday   ☐ Friday
☐ Saturday

Find   Reset

Results

Start Date	Stop Date	# Occurrences
9/14/2015	11/2/2015	8
11/16/2015	12/7/2015	4

Details

☐ Date	Day of Week

No data to display

Book

Note
If a date that meets the specified criteria is unavailable, the system ignores it. Separate results will be returned for date ranges that are broken by an unavailable date.

5.   In the Results panel, check the desired row(s) to display the details. The screen will display the Date and Day of Week of each result found. More than one row may be selected by pressing the Control key.

6.   Check the box adjacent to each date or check the box in the Details panel header to automatically select all dates for which the recurring appointment should be booked.

Here is an example of the screen showing the details after the desired results have been selected:

7.   When all possible dates have been selected for the recurring appointment, click **Book**.

8.   Click **Yes** in response to the confirmation request. This action brings up the *Student Appointment Screen*.

9.   Proceed to book the appointment on the *Student Appointment Screen*.

SECTION 7   DROP-INS

7.0   Overview

The *Drop-in Screen* lists students who arrive for an unscheduled visit in the order of arrival and is used to assign those students to an advisor. In order to work with drop-ins, the user must have the appropriate Drop-in access rights.

7.1   The Drop-in Screen

The screen displays, in chronological order, a list of students who have checked in for a drop-in visit for the day at a selected Location. There are three view modes:

- Show All: Shows all students who have registered for a drop-in visit during that day.

- Waiting: Shows all students who have not yet been seen by an advisor.

- Only My Students: Displays only those students for the Short Name of the user who is signed in.

The screen has the capability of displaying a variety of columns (e.g., Student ID and/or Reason Code associated with each visit). A Time Serviced column will also be displayed in the All Students and Only My Students mode.

The screen view defaults to the check-in order. To view the list of students by advisor name, click ▼ in the Advisor header to display a sort order menu. Select **Sort Ascending** or **Sort Descending**. To restore the view to the default (by check-in time), select **Restore Sort**.

Here is an example of the screen in the *Show All* mode.

Here is an example of the screen in the *Waiting* mode:

Student ID	Student Name	Advisor	Check-in Time	Reason Code(s)	Comments
6543210	NESTLE, NATHAN	Next Available	9:45:22 AM	ADD/DROP	Add Business Math as pre-req for Accounting 1A
9012345	MENTHE, MATTHEW	Abraham Lincoln	9:47:25 AM	OVERRIDE	Completed 18 last semester with 3.9 GPA
3210987	SKOR, SUSAN	Next Available	9:52:31 AM	AP CREDIT	Seeking info on process to request AP Credit
5678901	ROAD, ROCKY	Theodore Roosevelt	10:07:43 AM	ADVISING	Vocational certificate questions
2109876	TOBLERONE, TONY	Next Available	10:09:15 AM	ADVISING	FYE student
1234567	TURTLES, TANYA	Next Available	10:15:22 AM	COURSE SELECT	Needs help selecting Distance Learning course
4321098	REESES, RAY	Next Available	10:54:43 AM	ADD/DROP	Registered for 9 but wants to carry 16 units
7654321	MOUNDS, MICHAEL	Next Available	10:55:06 AM	PERSONAL	
9876543	KRACKEL, KAREN	Next Available	10:57:14 AM	ADD/DROP	Drop Philosophy (an elective, not required)

ADVISING > Monday, January 5, 2015 — Quick Links — THE GRID / MY GRID / Drop-in — Show All / Waiting / Only My Students — Add / Delete — << Previous / Next >>

Here is an example of the screen in the *Only My Students* mode:

Student ID	Student Name	Advisor	Check-in Time	Time Serviced	Reason Code(s)	Comments
9999999	GARNER, JOHN	James Madison	8:18:34 AM	8:30:40 AM	ADD/DROP	Drop Chemistry 1A and add Biology 1A
8765432	MARSBAR, MICHAEL	James Madison	8:43:59 AM	8:47:42 AM	COURSE REPET	Business Math
6666666	MARSHALL, THOMAS	James Madison	8:54:45 AM	9:00:37 AM	ADVISING, PERSONAL	New student has general questions
7890123	PEPPERMINT, PATTY	James Madison	9:11:12 AM	9:17:29 AM	ADD/DROP	Drop Psych 1A and add Poli Sci 1A

ADVISING > Monday, January 5, 2015 — Quick Links — THE GRID / MY GRID / Drop-in — Show All / Waiting / Only My Students — Add / Delete — << Previous / Next >>

Drop-in Screen	
Option	**Description**
Student ID	Use to display the student's ID.
Student Name	Use to display the student's name.
Advisor	Use to display the name of the advisor to whom the student has been assigned to be seen, or "Next Available" if no advisor has been assigned.
	▼ Use to sort the list by advisor in ascending or descending order, or to restore the sort order by check-in time.

Drop-in Screen	
Option	**Description**
Check in Time	Use to show the time that the student checked in for the drop-in visit.
Time Serviced	[Displayed only in *Show All* and *Only My Students* mode] Use to display the time that each student was actually seen.
Reason Code(s)	Use to display the selected reason(s) for each student's drop-in visit.
Comments	Use to display any comments associated with the drop-in visit.
Show All	Use to display all students who have registered for a drop-in visit during the day.
Waiting	Use to display only those students who are currently waiting to see an advisor.
Only My Students	Use to display only those students assigned to or seen by the current advisor who has signed on to the Drop-In screen. This option is displayed only if the user who is signed in has a Short Name other than All.
Add	Use to display the *Student Drop-in Appointment* screen in order to add to the drop-in list a student requesting assistance without having pre-booked an appointment. This option is displayed only if the user has access rights to add drop-in students to the list.
Delete	Use to delete a student name from the drop-in list. This option is displayed only if the user has access rights to delete drop-in students from the list.
<< Previous	Use to go to the previous day.
>> Next	Use to advance to the next day.

Note
A Public View Waiting List may also have been set up by the system administrator for students to view while they are waiting. See "The Public Viewer Waiting List" at Section 18.

7.2   Add a Student to the Drop-in Screen

Users with the applicable access permissions may add students to the drop-in list, assign the student to the advisor who is handling the visit, and also delete students from the list. The Drop-in Screen defaults to a list of all students, in the order of arrival, who have registered on that specific date and have not yet been seen.

1.   Place the focus on the tab labeled **Drop-in**.

2.   Note the Flyout menu [**Name > Location > Day > Date▾**] and verify that the date is for "Today". To change the date, touch or click on the Flyout menu to display a selection screen.

   a.   If needed, click **Location ▾** and select the Location in which the appointment is to be scheduled.

   b.   In the Date panel, note that a date picker offers the opportunity to navigate to a selected month and year, to click on a specific date on the calendar, or to select today by clicking on **Today**.

   c.   Move the cursor away from the selection panel to return to the Drop-in screen.

Tip
To find adjacent dates that are not currently displayed, use **Next >>** or **<< Previous** at the bottom of the Drop-in screen.

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3. Click **Add** to display the *Student Drop-in Appointment Screen*. Here is an example:

Student Drop-in Appointment Screen		
Option		**Description**
Student Information	Student ID	Use to record the student identifier (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID). The field label will be the primary ID format. Other ID formats (if they are being used by the Location), such as Guest ID, may be generated by clicking on the Student ID label and selecting the desired format.
	🖉	Use to automatically change the ID field to the Guest ID format and to generate a temporary identifier with **SG** as the leading characters.
	Name	Use to record the student's name. If the preferred names feature has been activated, any preferred name, such as a nickname, will be displayed within quotation marks following the student's full name.
	+/-	Use (+) after entering a student ID to display a screen on which the user may view or record student name details. Once the screen has been opened, clicking on the (-) symbol will close the screen. Splitting a student name into separate fields provides for great flexibility. For example, it allows users to personalize email messages (e.g., Dear John, vs. Dear SMITH, JOHN). It provides for more consistent sorting by last name on reports. And it more reliably abbreviates last names on the Waiting List.

Student Drop-in Appointment Screen			
Option			**Description**
		First Name	Use to enter the student's first name.
		Middle Name	Use to enter the student's middle name, or middle initial.
		Last Name	Use to enter the student's last name.
		Suffix	Use to enter any suffix for the student's name, if any.
		Preferred Name	Use to enter the student's preferred name, such as a nickname. This field will be displayed only if it is activated in Global Configurations.
	Search / Reset		Use to search for a Student ID by using the Student Name. This button may change to Reset if an ID is entered that does not exist in the database, depending on the system settings.
	Birth Date		Use to display or record the student's date of birth.
	Home Phone		Use to display or record the student's permanent telephone number, which is typically the number stored in the college's database.
	Extension		Use to display or record the extension to the permanent telephone number.
	Contact Phone		Use to display or record the student's preferred contact telephone number, if different from the Home Phone. The system will use the number in this field, if it is populated.
	Extension		Use to display or record the extension to the contact telephone number.
	Text Phone		Use to display or record the student's cell phone number if it has text messaging capabilities.
	Email		Use to display or record the student's primary email address. This is the email address that is stored in the college's database.
	Email 2		Use to display or record the student's alternate email address, if allowed. If Email 2 is present, then it is the email address that is used by the system.
Appointment Information	Reason Code		Use to select one or more reasons for requesting the drop-in visit.
	+		Use to display a screen showing all Reason Codes at a glance and to select one or more codes from that screen.
	Comments		Use to enter specific information about the reason for the drop-in visit.
	Advisor		Use to select the advisor with whom the drop-in visit is being made or to select Next to assign the drop to the next available advisor.
[Other options]	Additional Info		[Available if the Location has opted to include this feature and the user has been given permission] Use to view, and if permitted, to record responses to pre-established questions that will provide more detailed information about the student.

Student Drop-in Appointment Screen		
Option		**Description**
	Alert	Use to enter or display a message that is viewable by advisors or schedulers.
	Notepad	[Enabled for users with Notepad access] Use to display the Notepad in order to view, print, write, and, in some cases, delete and change the security status of notes about students. (See "The Notepad" at Section 16.)
	Opt-in Settings	Use to specify the available and preferred methods for contacting the student (Phone, Email, and/or Text).
	Student History	Use to gain access to the Student History screen containing all appointment and drop-in history for the selected student, as well as a history of all answered eAdvising questions.
	View Course List	[Enabled if courses are being used as Reasons] Use to view a list of courses in which the student is currently enrolled and, if needed, select courses as reasons for the appointment.
Term		[Available if Show Term List has been selected on the *Miscellaneous Settings* screen for this Location] Use to give users the option to link the topic of the current appointment to a specific term (e.g., discussion of an Ed Plan for the next semester).
Info Flags		[Enabled after a Student ID is entered, if the Location has opted to include the Additional Info Flags feature] Use to display up to four Additional Information questions about the student. (See "Select Additional Info Flags for Display on the Student Appointment and Drop-in Appointment Screens" in the SARS Anywhere Administration Manual at Section 12.6.)
[Button Bar]	Commit Drop-in	Use to obligate the drop-in visit. [This option is activated only after the student's ID has been entered and the curser has moved to the next field.]
	Close	Used to exit the screen.

4. [Required] Select one of the options below to enter the student's identifier.

   a. Type the student's identifier in **Student ID** (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID).
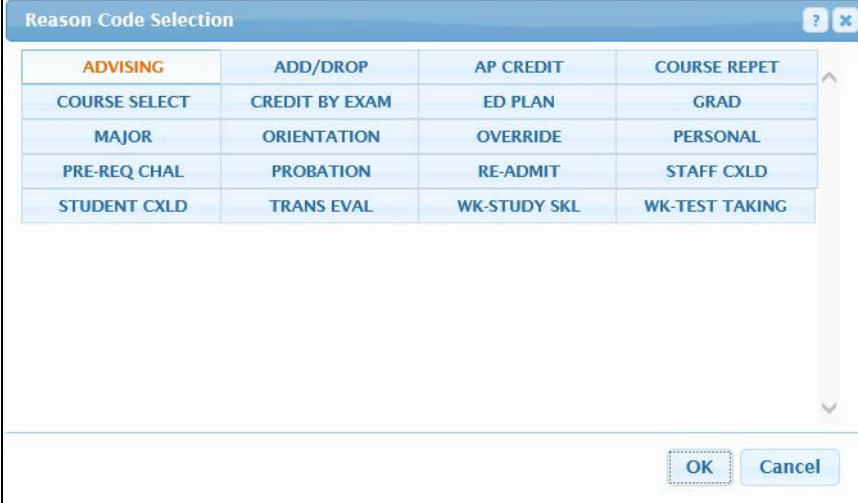
   Notes
   If the student's ID format is different from that provided in the ID field, click the **Student ID** label to display a menu of available ID formats and select the desired format (e.g., a pre-assigned Guest ID). Then type the student's identifier.

   If an ID is entered that does not exist in the database, an error message will be displayed or the Search button label will change to Reset, depending on the system settings. Enter the correct ID, or first click **Reset** to clear the Student ID field and then enter the correct ID.

   b. If the student's identifier is not known, type the student's name or a portion thereof in **Name** and click **Search**. If matches are not found in the database, a notification message will be displayed. If only one match is found in the SARS database, the student's identifying information will be

displayed. If more than one match is found, a list of all students with that name will appear on a *Search Results* screen. From the *Search Results* screen,

    i)   Click the selected name.

    ii)   Click **OK**.

c.   If the individual does not have an identifier, click the <u>pencil</u> icon ✐ to automatically change the ID field to the Guest ID format and to generate a temporary identifier with **SG** as the leading characters. The action will enable the <u>Student Name</u> field.

5.   [Required] If the **Name** field is not populated automatically after entering the Student ID, type the student's last name, first name (for example, Smith, John). The last name first method will render reports sorted by student names more usable. To create greater flexibility, click **+**. This will open a screen that provides an option to separate the student's name into separate fields. In the case of a guest ID, the drop down name field will open automatically and completion of the fields will be required.

6.   Complete the remaining fields in the <u>Student Information</u> panel, if needed.

a.   In the **Birth Date** field, type the student's birth date or use the date picker to select the student's birth date (see "Date Picker" at Appendix B).

b.   Note the **Home Phone** and related **Extension** fields to verify that the information is correct. Generally, this information is imported from the college's database. If it is necessary to enter a phone number manually, see step c, below.

c.   In the **Contact Phone** field, type the student's preferred contact telephone number, if different from the Home Phone. Also type any extension in the related **Extension** field, which will accept up to 20 characters. This phone number typically will not be affected by imports from the college database.

d.   In the **Text Phone** field, type the student's text phone number, if the student has a cell phone with text messaging capabilities. (The text option will be usable only if the college has a valid license for text messaging.)

e.   Click the **Email** field and type the student's primary email address.

f.   Click the **Email 2** field, if allowed, and type the student's preferred email address.

7.   In the <u>Appointment Information</u> panel,

a.   If a default Reason Code has been established, it will be highlighted in the Reason Code panel. Select or change Reason Codes as appropriate (e.g., ADD DROP). (Use the scroll bar if the list extends beyond the viewable screen or click the **+** sign adjacent to the Reason Code label to display a screen showing all available Reason Codes.) Here is an example of the screen showing all available reasons:
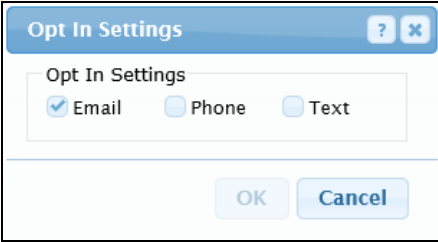
b. Click the **Comments** field to enter specific information about the reason(s) for making the drop-in visit. The field will accept up to 255 characters.

c. Leave the option at **Next** to indicate that the student has not expressed a preference and should see the next available individual, or click **Advisor ▼** and then on a specific name to enter the student's preference.

8. Click **Opt In Settings** to display the *Opt In Settings* screen, if you want to verify or change the contact methods listed for the student. Here is an example.

a. Ensure that **Email**, **Phone** and/or **Text** are checked, as appropriate, to specify the contact methods for the student. If an option is disabled, the student does not have the contact method listed in the system, the college has not set up the option, and/or (in the case of text messaging) the college does not have a software license for that feature.

b. Click **OK** to save the settings or click **Cancel** to exit the screen.

c. Click **Yes** in response to the Confirmation message.

9. If the student ID is already stored in the database, the following options may also be enabled:

a. *Additional Info* – depending on whether the system administrator has set it up for this Location (see Section 9).

b. *Alert* (see Section 10).

c. *Notepad* – if the user has access to the Notepad (see Section 16).

d. *Student History* (see Section 8).

     e.   *View Course List* – depending on whether courses are being used as Reasons.

10. If the "Show Term List" option has been selected by the system administration for the Location, a Term field will be available. The field will be populated by the current term or, if the drop-in visit occurs between terms, it will display the next term. To link a topic for discussion in the drop-in visit to a different term (e.g., discussion of an Ed Plan for the next semester), click **Term ▼** and select the desired Term. (Also see "Show Term List" in the SARS Anywhere Administration Manual at Section 6.6.)

11. Review the Info Flags panel to see whether important information about the student is listed (for example, completed key actions toward matriculation goals).

12. Click **Commit Drop-in**.

    a.   If the drop-in visit might conflict with a pending appointment for this student in any Location, a warning screen will be displayed. To proceed with the action, click **OK**. Otherwise, click **No** and advise the student of the conflicting appointment.

> **Note**
> Users will be able to see the actual Location and Short Name for the conflicting appointment if they have scheduling permissions for that Location. If not, in order to preserve student confidentiality, users will see an asterisk (*) with the following message: "Details about the Location and Short Name are not available based on your permission level."

    b.   If the Use Short Name Assignments option has been activated by the system administrator, the name of the advisor to whom this student is assigned will be displayed in the Advisor field. Otherwise, click **Advisor ▼** and then on a specific name to enter the student's preference, or leave the option at **Next** to indicate that the student has not expressed a preference and should see the next available individual.

> **Note**
> If the selected advisor is different from the individual assigned to the student, a warning message will be displayed. Click **Yes** to assign the drop-in to the unassigned advisor, or click **No** to select the assigned advisor.

    c.   Click **OK**. The student's name will be added to the *Students Waiting* Screen.

7.3   Select a Student from the Drop-in Screen

The *Drop-in* screen in the Students Waiting mode defaults to a list of students who have not yet been seen, in the order of arrival. The number of students waiting will be displayed in red on the Drop-in tab. Advisors may assign students to themselves

1. Click the **Drop-in Tab**.

2. Make sure that the screen is displaying in the **Waiting** mode.

3. Double-click on the line containing the student's name. This action will display the *Student Drop-In Appointment* screen.

4. In **Advisor ▼**, the name of the advisor who signed on to the system is displayed automatically, in which case no selection is required. If you are a scheduler, click **Advisor ▼** and select the advisor name, if it the desired advisor different from the one displayed.

5. Click **OK**. A confirmation message will be displayed if the Hide Messages option has not been activated.

6. Click **OK**. You will be returned to the *Drop-in* List. The student's name will be removed from the *Students Waiting* list, but will be retained on the *All Students* list. A record of the activity will be added to the student history file, which can be viewed from Student History.

Notes

If the steps listed above are performed for a date that is in the past, the system will prompt the user to enter the time that the student was assigned to the advisor.

If a student's name was selected in error, click **All Students**, double-click on the student's name to display the *Student Drop-in Appointment* screen, and click **Restore**. After confirming the action, the name will be restored to the Students Waiting list showing the original time that the student was added to the list.

7.4   Change Information about a Student on the Drop-in Screen

You may change any of the information on the *Student Drop-in Appointment* screen except for the student's ID.

7.4.1   Change Reason Codes

1. From the *Drop-in* screen, double-click on the student's name from the All Students list. The *Student Drop-in Appointment Screen* will be displayed for that student.

2. Change the information as desired. Specifically, to change Reason Codes,

    a. Click on any reasons to be de-selected.

    b. Click on any reasons to be added.

3. Click **Close**. A confirmation message will be displayed.

4. Click **OK**.

7.4.2   Set the Actual Start and Stop Times for a Drop-in Visit
          [under development]

The actual start time and stop time of a drop-in visit may be set <u>after</u> the advisor has selected the student to be seen.

7.5   Print the Drop-in Screen
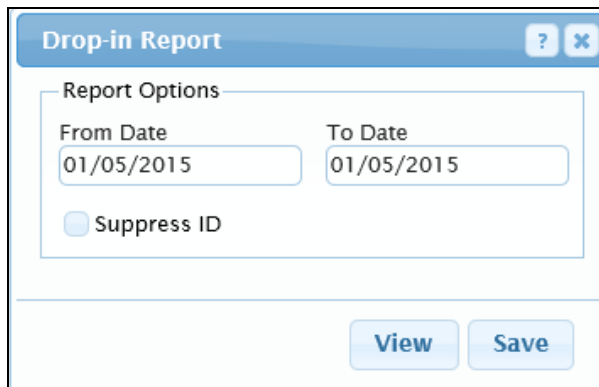
Two versions of the Drop-in Report are available: All Students and Students Waiting. The report displays the following information: Student Name, Student ID, Advisor, Arrival Date and Time, Time Serviced, Time Waiting (elapsed time between check-in time and the time that each student was seen), Comments, total counts for the total number of Drop-ins Seen and the number of Drop-ins Not Seen, the Average Wait Time for those students who were seen, and the total number of students who were deleted from the list.

---

1. From the *Drop-in* List, click **Show All** or **Waiting** or **Only My Students** to display the desired screen.

    Note
    The drop-in list for the screen that is currently displayed will be printed.

2. Click the **Print** icon on the tool bar to display the *Drop-in Report* screen. Here is an example.

3. Click the **From Date** field and type in the first date to be covered by the report, or use the Date Picker. (See "Date Picker" in Appendix B.)

4. Click the **To Date** field and type in the last date to be covered by the report, or use the Date Picker.

5. Click **Suppress ID**, as desired, to hide student IDs from the report printout.

6. To view or print the report, click **View**. The report will be displayed in pdf format utilizing the pdf viewer that is installed in your system. Paper copies can be printed from that screen.

7. To save the report to a file, click **Save**. The following prompt will be displayed at the bottom of the screen:

    a. Click **Open**. The report will be displayed in .PDF format.

    -or-

    b. Click **Save**. A menu will be displayed with the following options: **Save**, **Save As**, and **Save and Open**. Select the desired option and proceed according to the prompts.

Here is an example of the All Students version of the report.

Drop-in Report - All Students

From 1/5/2015 to 1/5/2015

Student ID	Students Name	Name	Date	Arrived	Serviced	Waiting	Comments
9999999	GARNER, JOHN	James Madison	1/5/2015	8:18 AM	8:30 AM	12 Mins	Drop Chemistry 1A and add Biology 1A
3456789	ZERO, ZACHARIAH	Franklin Pierce	1/5/2015	8:34 AM	8:47 AM	13 Mins	English 1A
8765432	MARSBAR, MICHAEL	James Madison	1/5/2015	8:43 AM	8:47 AM	4 Mins	Business Math
6677881	DAWES, CHARLES	Abraham Lincoln	1/5/2015	8:49 AM	8:54 AM	5 Mins	Completed 20 units last term with 4.0 GPA
5432109	OH, HENRY	Franklin Pierce	1/5/2015	8:51 AM	8:55 AM	4 Mins	Question if should take Bus Math or Algebra
6666666	MARSHALL, THOMAS	James Madison	1/5/2015	8:54 AM	9:00 AM	6 Mins	New student has general questions
8901234	MILKYWAY, MARY	Franklin Pierce	1/5/2015	8:58 AM	9:01 AM	3 Mins	Needs help completing PR Form for English & Math
2345678	TWIX, THERESA	Abraham Lincoln	1/5/2015	9:10 AM	9:17 AM	7 Mins	Completed 20 credits last semester with 3.9 GPA
7890123	PEPPERMINT, PATTY	James Madison	1/5/2015	9:11 AM	9:17 AM	6 Mins	Drop Psych 1A and add Poli Sci 1A
2345678	TWIX, THERESA		1/5/2015	9:12 AM	9:18 AM		Seeking approval to take exam for Math - Deleted
4567890	TOFFEE, THOMAS	Theodore Roosevelt	1/5/2015	9:16 AM	9:20 AM		Financial Aid question - Deleted
4567890	TOFFEE, THOMAS		1/5/2015	9:40 AM	9:41 AM		Passing grade in Anatomy pre-requisite for Nursing program - Deleted
4567890	TOFFEE, THOMAS		1/5/2015	9:42 AM	4:16 PM		Passing grade in Anatomy pre-req for Nursing - Deleted - Deleted
6543210	NESTLE, NATHAN	John Adams	1/5/2015	9:45 AM	12:25 PM	2 Hrs 40 Mins	Add Business Math as pre-req for Accounting 1A
9012345	MENTHE, MATTHEW	Abraham Lincoln	1/5/2015	9:47 AM			Completed 18 last semester with 3.9 GPA
3210987	SKOR, SUSAN		1/5/2015	9:52 AM			Seeking info on process to request AP Credit
1234567	TURTLES, TANYA		1/5/2015	9:55 AM	10:14 AM		New student asking about distance learning - Deleted
5678901	ROAD, ROCKY	Theodore Roosevelt	1/5/2015	10:07 AM			Vocational certificate questions
2109876	TOBLERONE, TONY		1/5/2015	10:09 AM			FYE student
1234567	TURTLES, TANYA		1/5/2015	10:15 AM			Needs help selecting Distance Learning course

Printed: 1/26/2015 1:36:29 PM   - 1 -   Location: ADVISING

Here is an example of the Students Waiting version of the report:

Drop-in Report - Students Waiting

From 1/5/2015 to 1/5/2015

Student ID	Students Name	Name	Date	Arrived	Serviced	Waiting	Comments
9012345	MENTHE, MATTHEW	Abraham Lincoln	1/5/2015	9:47 AM			Completed 18 last semester with 3.9 GPA
3210987	SKOR, SUSAN		1/5/2015	9:52 AM			Seeking info on process to request AP Credit
5678901	ROAD, ROCKY	Theodore Roosevelt	1/5/2015	10:07 AM			Vocational certificate questions
2109876	TOBLERONE, TONY		1/5/2015	10:09 AM			FYE student
1234567	TURTLES, TANYA		1/5/2015	10:15 AM			Needs help selecting Distance Learning course
4321098	REESES, RAY		1/5/2015	10:54 AM			Registered for 9 but wants to carry 16 units
7654321	MOUNDS, MICHAEL		1/5/2015	10:55 AM			

Drop-ins Seen: 12   Drop-ins Not Seen: 7   Average Wait Time: -40 Mins

Here is an example of the report generated in the Only My Students Mode:

Drop-in Report - My Students - (John Adams)

From 1/5/2015 to 1/5/2015

Student ID	Students Name	Name	Date	Arrived	Serviced	Waiting	Comments
6543210	NESTLE, NATHAN	John Adams	1/5/2015	9:45 AM	12:25 PM	2 Hrs 40 Mins	Add Business Math as pre-req for Accounting 1A
1111111	SMITH, JOHN	John Adams	1/5/2015	8:13 PM	10:01 AM	-12 Mins	Work conflict - must drop Geometry and History

Drop-ins Seen: 2   Drop-ins Not Seen: 0   Average Wait Time: -46 Mins   Deleted: 0

7.6   Move a Student to an Individual Appointment Slot
[under development]

7.7   Copy a Student to an Individual Appointment Slot
[under development]

7.8   Delete a Student from the Drop-in Screen

If a student is deleted from the *Students Waiting* list, the name will remain on the *All Students* list. Deleting a student from the *All Students* list, however, is an irrevocable action. If you wish to generate a Drop-In Report showing all students who made drop-in visits, regardless of whether they were seen by an advisor, do not delete names from the *All Students* list. If a student is deleted from either list, the original entry will not be stored in the student's history.

1. From the *Drop-in* screen, click on *Students Waiting*; then click on the line containing the student to be cancelled.

2. Click **Delete**. A confirmation screen will be displayed

3. Click **Yes**.

Note
To restore a student's name that was deleted from the *Students Waiting* list, go to the *All Students* screen, double-click on the student's name to display the *Drop-in Appointment* screen, and click **Restore**. After confirming the action, the name will be restored to the *Students Waiting* list with the original arrival time.

SECTION 8   STUDENT HISTORY

8.0   Overview

  The Student History screen is used to locate a student's existing appointments and drop-in visits and to view or print the appointment and drop-in history for a student back to the earliest date established by the system administrator. It may also be used to cancel a student appointment. Finally, it may be used to view a list of all of a student's eAdvising messages that have been answered.

Here is an example.

Student History									? ✕
Appointment			**Activity**	**Attend**	**Reason(s)**	**Comments**	**Entry Information**		
Name	**Date**	**Time**	**Location**					**Date / Time**	**User**	**Source**
MONROE	3/10/2015	2:30 PM	ADVISING	A	N	PERSONAL		3/2/2015 12:50:59...	CT	GRID A
ADAMS	2/18/2015	10:30 AM	ADVISING	C	*	STUDENT CXLD		2/14/2015 12:49:5...	JM	GRID A
ADAMS	2/18/2015	10:30 AM	ADVISING	A	*	PERSONAL		2/12/2015 9:39:04...	SP	GRID A
ADAMS	2/2/2015	9:37 AM	ADVISING	A	Y	ADD/DROP	Drop Algebra 1A	2/2/2015 8:30:12 AM	SSPI	GRID D
MONROE	1/30/2015	1:00 PM	ADVISING	A	-	ADVISING	Follow up questions on course requirements.	1/27/2015 10:22:3...	SP	GRID A
MONROE	1/29/2015	3:30 PM	ADVISING	M	*		Follow up questions on course requirements.	1/26/2015 9:21:49...	SC	GRID A
ADAMS	1/8/2015	4:00 PM	ADVISING	A	Y	ED PLAN	e·SARS - Scheduled via internet	1/5/2015 2:20:14 AM	KIOSK	Web A
MONROE	1/5/2015	8:30 AM	ADVISING	A	Y	ORIENTATION		1/5/2015 8:01:01 AM	CT	GRID A

Student ID `1111111`   Student Name `SMITH, JOHN`   🔍 Search   🖋 Clear

All Data Just Appointments   Go to page: `1` Show rows: `50 ▾` 1-13 of 13 ◀ ▶

Appointment and drop-in activity will appear on the list in reverse chronological order. Appointment information includes the name of the advisor, the date of the appointment, the time of the appointment, the location (department), the type of activity (**A** represents a booked appointment or an eAdvising response, **M** represents a moved appointment, and **C** represents a cancelled appointment), the attendance status, the reason(s) for the appointment and any comments. It also displays the date/time that the scheduling action was taken and the initials, user name or other identifier of the person who took the action. The Source column will display the application used to schedule the activity.   **GRID A** represents an appointment made via THE GRID or MY GRID, **Web A** represents an appointment made via eSARS, and **TRAK A** represents an appointment made via SARS·TRACK. **GRID D** represents a drop-in recorded via SARS Anywhere and/or SARS·TRACK. **eAdvising** represents a response to a question that was posted via eAdvising.

Student History	
Option	**Description**
Student ID	Use to display or enter the student's identifier.
Student Name	Use to display or enter the student's name.
Search	Use to search for a student ID using the Student Name.
Clear	Use to clear the Student History screen for another entry in ID or Name.
All Data	Use to display all scheduled, cancelled, moved, and extended appointments and drop-in visits, as well as all eAdvising questions.
Just Appointments	Use to exclude appointments that did not occur because they were cancelled or moved. eAdvising questions are not included in the Just Appointments mode.
Go to page	Use to advance or go back to a specific page number.
Show rows	Use to specify the number of rows to be displayed at one time.
◄ ►	Go back to the previous page or go forward to the next page.
Print	[Available when generated from Quick Links or the *Student Appointment Screen*] Use to print the Student History Report for the selected student.

8.1   Methods for Gaining Access to Student History

The *Student History* screen defaults to **All Data**. Appointments marked with an asterisk in the <u>Attend</u> column represent appointments that did not occur because they were cancelled or moved. To view only those appointments that actually existed, click **Just Appointments**.

8.1.1   From a Booked Appointment on THE GRID or MY GRID

1. With the focus on the booked appointment time slot for the selected student, click the **Student History** Tab, if it has been configured for easy access.

    -or-

2. With the focus on the booked appointment time slot for the selected student, click **Quick Links ▼** and then select **Student History**.

    -or-

3. Double-click on the time slot containing the individual appointment to display the *Student Appointment Screen*. Then click **Student History**.

8.1.2   From Any Place in SARS Anywhere

1. Click the **Student History** Tab, if it has been configured for easy access,

    -or-

Click **Quick Links** ▼and then select **Student History**.

2.   If the student information ID field is not yet populated, select one of the options below to enter the student's identifier.

a.   Type the student's identifier in **Student ID** (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID).

> **Note**
> If the student's ID format is different from that provided in the ID field, click the **Student ID** label to display a menu of available ID formats and select the desired format (e.g., a pre-assigned Guest ID). Then type the student's identifier.

b.   If the student's identifier is not known, type the student's name or a portion thereof in **Name** and click **Search**. If matches are not found in the database, a notification message will be displayed. If only one match is found in the SARS database, the student's identifying information will be displayed. If more than one match is found, a list of all students with that name will appear on a *Search Results* screen. From the *Search Results* screen,

i)   Click the selected name.

ii)   Click **OK**.

8.1.3   From a Group Appointment Time Slot

1.   From THE GRID or MY GRID, double-click on the group appointment time slot to display the *Student Appointment Screen*. (If the appointment is full, the Roster will appear immediately. Skip to step 3.)

2.   Click **Roster**.

3.   Click on the desired student.

4.   Click **Student History**.

8.2   View, Print and Save Student History

After gaining access to the *Student History* screen for the selected student,

1.   If Student History has been generated using the Student History Tab, click the **Print** icon from the tool bar.

-or-

If Student History has been generated as a pop-up (e.g., from Quick Links or from the *Student Appointment Screen*), click the **Print** button on the screen.

2.   In either case, a dialog box will provide the option to suppress the Student ID. Here is an example:

Student History Report [?] [✖]
Report Options
☑ Suppress ID

View   **Save**
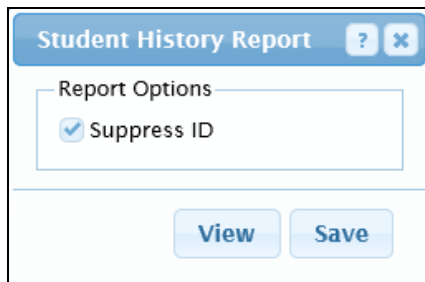
a. Click **Suppress ID** to omit the student ID's from the report display.

b. To view or print the report, click **View**. The report is displayed in a pdf format utilizing the pdf viewer that is installed on your system. Paper copies can then be printed from that screen.

-or-

Click **Save** to save the report to a file.

c. Click **Close**.

3. Click **Clear** to reset the screen for another entry in Name or ID. Then enter a new name and click **Search** or enter the student's ID.

4. To cancel an appointment that appears in Student History without having to return to THE GRID or MY GRID, double-click on the appointment to be cancelled. The *Student Appointment Screen* will be displayed and the cancellation can be made.

Note
Generally, cancellations should be made from THE GRID or MY GRID.

5. When done, exit the screen.

SECTION 9   ADDITIONAL INFORMATION

9.0   Overview

Additional Information provides options for users to view and record details about a student. The *Additional Information* feature will be available only after the system administrator creates a list of questions that will provide more detailed information about the student. The list of questions will apply to all students in the selected Location. Additional Information is tied to a student's identifier, not to a scheduled appointment.

The left-hand side of the *Additional Information* screen displays descriptions for each question. The right-hand side of the screen displays the value of the associated question. Depending on the properties of the question, the value will consist of a Date, List, Text or Yes/No response. Here is an example.

Description	Value
Additional Information	
Location ADVISING	
Matriculation Status	
Orientation	Yes
Assessment	Yes
Abbrev Ed Plan	
Comp Ed Plan	
General	
Date First Attended	1/5/2015
Major	Computer Science
Special Population	
Athlete	
International Student	
TRIO	
Veteran	Yes
Holds	
Academically Dismissed	
Library	
Outstanding Bill	
Student ID 1111111 Student Name SMITH, JOHN Search Clear	
Save	

Additional Information		
Option		**Description**
Location		Use to select the name of the Location in which the additional information is stored.
Description		Used to display the pre-set description of the additional information question.
Value	[Date]	Use to record a date response for an additional information question requiring a date response.
	[List]	Use to select from a list the response to the additional information question requiring a list response.
	[Text]	Use to enter a text response for the additional information question requiring a text response.
	[Yes/No]	Use to select a Yes or No response for the additional information question requiring a Yes/No response.
Student Information	Student ID	Use to display or enter the student's identifier (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID).
	Student Name	Use to display or enter the student's name.
	Search	Use to find a student by name whose ID is not known.
	Clear	Use to clear the screen for another entry in ID or Name.
Save		Use to store any entries and exit the screen.

9.1   Methods for Gaining Access to Additional Information

These methods may be used only if a student's ID already exists in the database being used. The ID is in the database once the first appointment is scheduled or if student data from an external source has been loaded in the database being used.

9.1.1   From a Booked Appointment on THE GRID or MY GRID

1. With the focus on the booked appointment time slot for the selected student, click the **Additional Information** Tab, if it has been configured for quick access.

    -or-

2. With the focus on the booked appointment time slot for the selected student, click **Quick Links ▼** and then select **Additional Information**.

    -or-

3. Double-click on the time slot containing the individual appointment to display the *Student Appointment Screen.* Then click **Additional Info**.

    -or-

4. From MY GRID, if this Additional Information icon ⌐i⌐ is displayed for the booked appointment for the student, click on the **Additional Info icon.**

9.1.2   From Any Place in SARS Anywhere

1. Click the **Additional Information Tab**, if it has been configured for easy access.

    -or-

    Click **Quick Links ▼** and select **Additional Information** to display the *Additional Information* screen.

2. If the student information ID field is not yet populated, select one of the options below to enter the student's identifier.

    a. Type the student's identifier in **Student ID** (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID).

        | **Note** |
        If the student's ID format is different from that provided in the ID field, click the **Student ID** label to display a menu of available ID formats and select the desired format (e.g., a pre-assigned Guest ID). Then type the student's identifier.

    b. If the student's identifier is not known, type the student's name or a portion thereof in **Name** and click **Search**. If matches are not found in the database, a notification message will be displayed. If only one match is found in the SARS database, the student's identifying information will be displayed. If more than one match is found, a list of all students with that name will appear on a *Search Results* screen. From the *Search Results* screen,

        i) Click the selected name.

        ii) Click **OK**.

9.1.3   From a Group Appointment Time Slot

1. From THE GRID or MY GRID, double-click on the group appointment time slot to display the *Student Appointment Screen*. (If the appointment is full, the Roster will appear immediately. Skip to step 3.)

2. Click **Roster**.

3. Click on the student for whom additional information is being viewed or recorded.

4. Click **Additional Information**.

9.2   Work with Additional Information

Users may view additional information for all Locations to which they have access. Users may also be able to record answers to additional information questions, if they have been given permission to do so and the specific question is enabled for use.

After gaining access to the *Additional Information* screen for the selected student,

1. Review the response to each question. Each question is pre-set to allow for one of the following types of responses: date, list, text, or yes/no. The following are examples.

           Date First Attended?   1/5/2015
           Major?   Computer Science
           Veteran?   Yes

2. If the user is able to record a response to one or more questions, follow the steps below:

    a. When a <u>Date</u> response is allowed, click on the line in the <u>Value</u> column adjacent to the question. Type in the desired date, or use the Date Picker. (See "Date Picker" in Appendix B.)

    b. When a <u>List</u> response is allowed, (e.g., Major), click on the line in the <u>Value</u> column adjacent to the question. Select a response from the menu. To select more than one option from the list, after clicking on the line, hold down the Control key and then click on each item to be included.

    c. When a <u>Text</u> response is allowed, click on the line in the <u>Value</u> column adjacent to the question. Type in a response.

    d. When a <u>Yes/No</u> response is allowed, click on the line in the <u>Value</u> column adjacent to the question. Select a response from the menu.

    e. Click **Save**.

3. When done, exit the screen.

SECTION 10   ALERTS

10.0   Overview

This section discusses the types of alerts available from the Alerts feature of SARS Anywhere. The last section discusses, in addition, how to work with Early Alerts from SARS Anywhere, if the college is using the separate Early Alerts application.

You may wish to use the Alert feature in the following situations: reminding a student to bring needed documents to the appointment or identifying the student as a repeated "no show." The Alert screen can accommodate up to 2,000 characters. The alert is tied to the student's ID, not to a scheduled appointment.

If only one alert exists for that student, it will be displayed in full. Multiple alerts will be displayed on a list. If an Alert on a list cannot be read in its entirety, double-click on the row containing that Alert to display it in full.

Here is an example of the *Alert* pop-up screen when a student has only one Alert: The Alert Type, Location, Author and Creation Date will be displayed in a panel at the top of the screen.
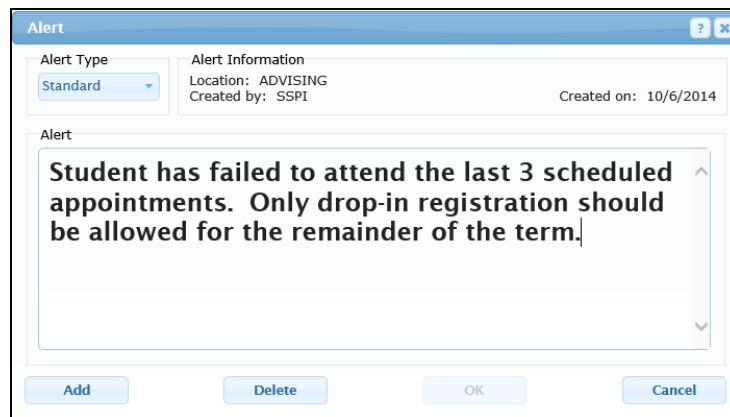
Here is an example of the Alerts screen when more than one alert exists for a student and it is retrieved from the *Student Appointment Screen*.
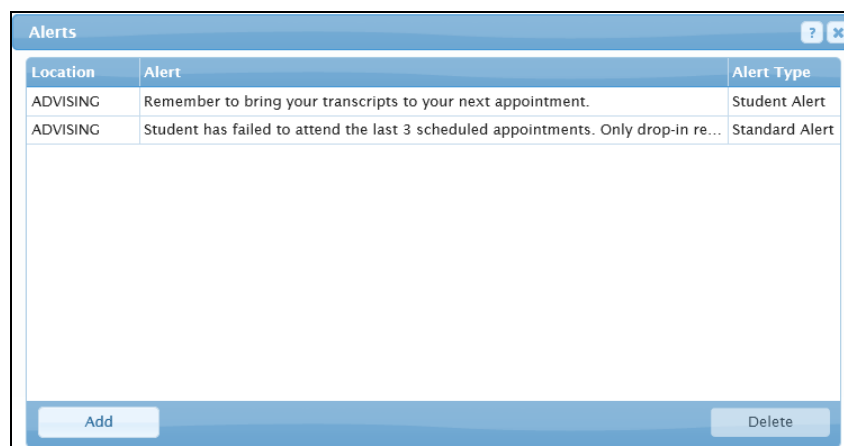
Pop-Up Alert	
Option	**Description**
Alert Type	Use to select the type of alert (e.g., Standard, Global, Primary, or Student).
Add	Use to add an alert.
Delete	Use to remove the alert.
OK	Use to save the alert.
Cancel	Use to close the screen without saving any new information.

Here is an example of the Alerts screen when more than one alert exists for a student and it is retrieved from either the Alerts Tab or Quick Links.

Alerts	
Option	**Description**
Location	Used to display the Location in which the alert was written. If it is a Global Alert, the Location will be "Global."
Alert	Used to display the beginning text of the alert.
Alert Type	Used to display the type of alert (e.g., Standard, Global, Primary, or Student).
Alert Preview	Use to view the content of the selected alert. The preview screen also displays the Location in which the alert was written, the author, and the creation date.
Student ID	Use to display or enter the student's ID.
Student Name	Use to display or enter the student's name.
Search	Use to search for a Student ID by using the Student Name.

Alerts	
Option	**Description**
Clear	Use to clear the screen for another entry.
Add	Use to add an alert. (Not applicable for Early Alerts.)
Delete	Use to remove an alert. (Not applicable for Early Alerts.)

10.1   Alert Types

There are four Alert types. Each is described below.

Alert Type	Description
Standard Alert	[This is the default] Use to create a regular Alert. A standard alert will be displayed after any Global and Primary Alert.
Global Alert	Use to create an Alert that will be automatically displayed in all Locations. This type of alert, of which there may only be one per student, can only be created (and deleted) by any system administrator with User Name Maintenance access rights. The system administrator's User Name and the date it was written will be embedded in the Global Alert. Only a user with the same access rights may delete it.
Primary Alert	Use to create an Alert that will be designated to be the first alert displayed, after the Global Alert, when more than one alert exists for a student. Only one Primary Alert per Location can exist for a student, and this type of alert can only be deleted by the user who created it or a system administrator with User Name Maintenance access rights.
Student Alert	Use to create an Alert to be viewed by the student when logging into the web interface (*e*SARS) or when using SARS·TRAK.

10.2   Methods for Gaining Access to Alerts

These methods may be used only if a student's ID already exists in the database being used. The ID is in the database once the first appointment is scheduled or if student data from an external source has been loaded in the database being used.

10.2.1. From a Booked Appointment on THE GRID or MY GRID

1.   With the focus on the booked appointment time slot for the selected student, click the **Alerts Tab**, if it has been configured for easy access.

   -or-

2.   With the focus on the booked appointment time slot for the selected student, click **Quick Links ▼** and then select **Alerts**.

   -or-

3.   Double-click on the time slot containing the individual appointment to display the *Student Appointment Screen*. Then click **Alerts**.
     -or-

4.   From MY GRID, if this Alerts icon ▢! is displayed for the booked appointment for the student, click on the **Alerts icon.**

10.2.2 From Any Place in SARS Anywhere

1.   Click the **Alerts Tab**, if it has been configured for easy access.

     -or-

     Click **Quick Links ▼** and select **Alerts**.

2.   If the student information ID field is not yet populated, select one of the options below to enter the student's identifier.

     a.   Type the student's identifier in **Student ID** (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID).

          Note

          If the student's ID format is different from that provided in the ID field, click the **Student ID** label to display a menu of available ID formats and select the desired format (e.g., a pre-assigned Guest ID). Then type the student's identifier.

     b.   If the student's identifier is not known, type the student's name or a portion thereof in **Name** and click **Search**. If matches are not found in the database, a notification message will be displayed. If only one match is found in the SARS database, the student's identifying information will be displayed. If more than one match is found, a list of all students with that name will appear on a *Search Results* screen. From the *Search Results* screen,

          i)   Click the selected name.

          ii)   Click **OK**.

10.3   View and Add an Alert

Users may view all Alerts originating from Locations for which they have permission to view Student History. Users may add Alerts (except Global Alerts) for all Locations in which they have permission to work. Only a system administrator may add a Global Alert.

After gaining access to the *Alerts* screen for the selected student,

1.   Review any existing message(s).

2.   Click **Add** to enable the screen for a new alert. Then,

     a.   Click **Alert Type ▼** and select the type of alert (**Standard**, **Global**, **Primary**, or **Student**).

     b.   In the body, type a message.

     c.   Click **OK** to save any entries.

3.   When done, exit the screen.

10.4   Edit an Alert

Any user who created his or her own Standard Alerts and Student Alerts may edit them. A system administrator with User Name Maintenance access rights may edit Alerts written by others. No user may edit a Primary Alert or Global alert.

After gaining access to the *Alerts* screen for the selected student,

1.   If more than one Alert exists, double-click on the Alert to be edited. If only one Alert exists, simply click on the body field for the Alert.

2.   Type the changes directly onto the existing alert.

3.   When done, exit the screen.

10.5   Delete an Alert

If an action required by an alert has been taken or if the alert is no longer applicable, the alert should be deleted. Any user who is able to read Student Alerts or Standard Alerts may delete those types of alerts. Primary Alerts may only be deleted by the user who created them or the System Administrator. Global Alerts may be deleted by any System Administrator.

After gaining access to the *Alerts* screen for the selected student,

1.   Click on the Alert to be deleted.

2.   Click **Delete**. A confirmation screen will be displayed.

3.   Click **OK**.

4.   When done, exit the screen.

10.6   Early Alerts

This section is applicable only if the college is using the separate Early Alerts application for promoting student success and retention.

If an Early Alert exists for a student, an Early Alert Popup will be displayed automatically when making an appointment for the student from THE GRID or MY GRID.

1.   If you are a scheduler and an Early Alert Popup is displayed when you are making an appointment for a student or adding the student on the *Drop-in* screen, the screen will look like this:
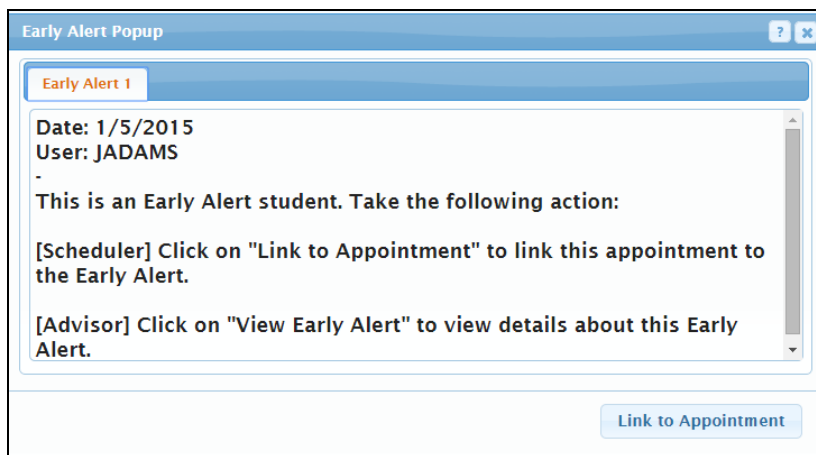
a. Tabs will indicate one or more Early Alerts (e.g., Early Alert 1, Early Alert 2, etc.). The most recently created Early Alert is always found using Early Alert 1 tab. Click on the desired tab.

b. Click **Link to Appointment** in order to attach the Early Alert to the appointment as a reason for the visit. You will be returned to the *Student Appointment Screen* or the *Drop-in Appointment* screen and may proceed.

2. If you are an advisor and an Early Alert Popup is displayed when you are making an appointment for a student or adding the student on the *Drop-in* screen, the screen will look like this:
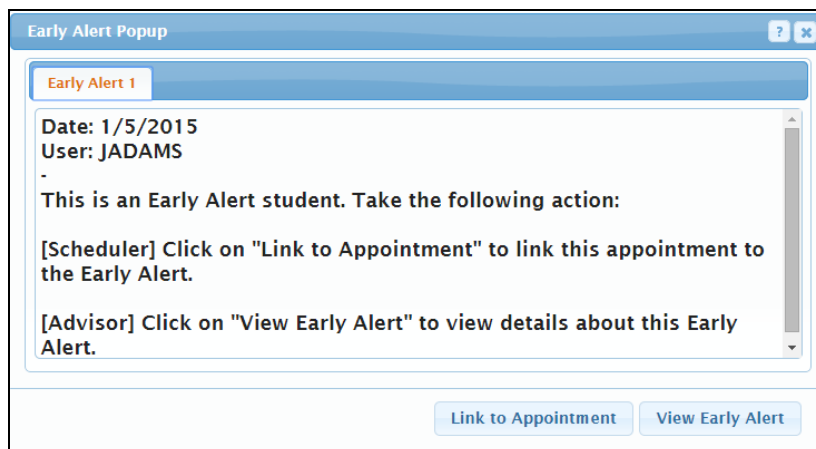
a. Tabs will indicate one or more Early Alerts (e.g., Early Alert 1, Early Alert 2, etc.). The most recently created Early Alert is always found using Early Alert 1 tab. Click on the desired tab.

b. Click **View Early Alert** to read the details of the Early Alert. Only users with a Short Name other than None will see the View Early Alert button. When done, click **OK**.

c. [If not already done by a scheduler] Click **Link to Appointment** to attach the Early Alert to the appointment as a reason for the visit. You will be returned to the *Student Appointment Screen* or the *Drop-in Appointment* screen*,* where an Early Alert option will be displayed in the Reason Code panel. Here is an example:

Note
At any time, clicking the **Early Alerts** option on the right side of the *Student Appointment Screen* or the *Drop-in Appointment* screen will display the Early Alert Popup(s) again.

Note
Early Alerts **cannot** be deleted in SARS Anywhere.

SECTION 11   ATTENDANCE

11.0   Overview

The Appointment Attendance feature serves two major purposes:

- To gather statistics on attendance status that may be important for reporting.

- To notify an advisor that a student has arrived for a scheduled appointment. This feature is available only if the automatic notification feature has been enabled and the default appointment attendance status is unmarked.

The functioning of the Student Attendance feature is dependent on the initial setting for each appointment-allowable Schedule Code. If the college has chosen to mark all students automatically as having attended their appointments, non-attendance must be changed to **No** manually. Conversely, if the college has chosen to mark all students automatically as having not attended their appointments, attendance must be changed to **Yes** manually. The recommended method, **Not Marked**, requires that each student's attendance be recorded manually.

SARS Anywhere offers three methods for recording appointment attendance, each of which is discussed in this Section.

11.1   Record Attendance from the Student Appointment Screen

1. From THE GRID or MY GRID, navigate to the desired date.

2. Double-click on the student's booked appointment time slot to display the *Student Appointment Screen*.

3. Click **Attendance** to display a menu with three attendance options: "Show", "No Show" and "Not Marked." Here is an example:

4.   Click the desired option to record or correct the attendance status for the selected appointment.

5.   Click **Close**.

11.2   Record Attendance from the Roster

The attendance for students in a group appointment may be marked in a single easy step.

1.   On THE GRID or MY GRID, double-click the group appointment time slot. (If the appointment is at capacity, the Roster will be displayed immediately. Skip to step 3.) If the appointment is not full, the *Student Appointment Screen* will be displayed.

2.   Click **Roster**.

3.   Highlight <u>either</u> all of the entries for the students who attended or for the students who did not attend the appointment.

> **Tip**
> To highlight more than one non-consecutive entry, hold down the Control key while clicking on each name. To highlight consecutive entries, use the Shift key; then click on the name of the first student to be included and also click on the name of the last student to be included.
>
> Highlight the fewer number of students. (For example, if 48 out of 50 students attended, highlight only the names of the two students who did not attend.)

4.   Click **Attended** to display a *Mark Attendance* screen as shown below.

   a.   Click the appropriate option (**Show**, **No Show**, **Reset** or **No Change**) for the group of selected names.

   b.   Click the appropriate option (**Show**, **No Show**, **Reset** or **No Change**) for the group of names that are not selected.

5.   Click **OK**. When finished, a confirmation message will be displayed.

6.   Click **OK.**

7.   When done, exit the Roster.

Tip To change the attendance status for just one student, select the attendance status for that individual. Leave the rest of the students as *No Change*. Click **OK**.

11.3   Record Attendance using Quick Attend

1.   From THE GRID or MY GRID, navigate to the desired date. To display another advisor (or day), press **<<Previous** to move to the column of the previous individual (or day) or press **Next>>** to move to the column of the next individual (or day).

2.   Click **Quick Links ▼** and select **Quick Attend** to display all of the advisor's appointments scheduled for that day for which attendance has not yet been marked as Show or No Show. Here is an example.

Quick Attend		
Option		**Description**
Student(s) Selected	Show	Use to mark that the selected student(s) attended the appointment(s).
	No Show	Use to mark that the selected student(s) did not attend the appointment(s).
	No Change	[the screen will default to this option] Use to leave the attendance unmarked.
Student(s) Not Selected	Show	Use to mark that the de-selected student(s) attended the appointment(s).
	No Show	Use to mark that the de-selected student(s) did not attend the appointment(s).
	No Change	[The screen will default to this option.] Use to leave the attendance unmarked.
OK		Use to save the attendance settings.

Quick Attend	
Option	**Description**
Cancel	Use to undo changes before they have been saved.

Note

If there are no unmarked appointments, the following message will appear, *The attendance for all appointments has already been marked.* Click **OK**.

3. If one or more entries are listed, highlight <u>either</u> all of the entries for the students who attended or for the students who did not attend the appointment.

Tips

To highlight one or more names, hold down the control key while clicking on the names.

Highlight the fewer number of students. (For example, if 8 out of 10 students attended, highlight only the names of the two students who did not attend.)

   a. Click the appropriate option (**Show**, **No Show**, or **No Change**) for the group of selected names.

   b. Click the appropriate option (**Show**, **No Show**, or **No Change**) for the group of names that are not selected.

4. Click **OK**. When finished, a confirmation message will be displayed.

5. Click **OK**.

SECTION 12   CONTACTS

12.0   Overview

In addition to scheduled appointments and drop-in visits, advisors may have additional contacts with students throughout each day. These contacts may involve a telephone call, email, or a brief encounter in or out of the office. One method is to simply tally contacts without linking them to a student ID; this is discussed under Section 12.1. Another method is to allow users to record contacts and link them to a student ID; this method is discussed under Section 12.2.

12.1   Tally Student Contacts

The *Additional Contacts* screen allows a tally of those contacts to be captured. This data typically will not be reported back to the college's host system.

1. From THE GRID or MY GRID, select the date for which additional contacts are to be recorded.

2. [If using THE GRID] Ensure that the focus is on the column for the correct advisor.

3. Click the **Contacts Tab**, if it has been configured for easy access.

    -or-

    Click **Quick Links ▼** and select **Contacts**. Here is an example of the *Additional Contacts* screen.

4. The Plus and Minus signs serve as counters. Click **+** to add a contact on the line containing the type of contact, or click **–** to remove a contact.

5. Click **Save**.

Any student contacts added in this manner will be listed on the "Appointment Attendance Summary Report" and the "Short Name History Report". (See the SARS Anywhere Reports Manual at Sections 4.1 and 4.9.)

12.2   Record Student-Specific Additional Contacts

If the college has chosen to establish a special Schedule Code to be used for recording student contacts on the Roster, a record of student-specific contacts rather than a simple tally will be available. Users must have permission to perform scheduling actions to use this feature.

The special Schedule code, such as EXTRA or MISC, should be included in the users' Master Schedules. Typically, the EXTRA or MISC Schedule Code is placed in the last row of the Master Schedule so that it does not interfere with other daily activities. This data typically will be reported back to the college's host system.

To record this type of Additional Contact, follow the steps below.

1. From THE GRID or MY GRID, double-click the time slot containing the special Schedule Code (e.g., EXTRA) on the day in which the contact occurred. The *Student Appointment Screen* will be displayed.

2. Proceed to add the student to the *Student Appointment Screen*, as if you were booking the student into a group appointment. (See "Schedule an Appointment" at Section 6.3.)

Any student contacts added in this manner will be listed on the *Roster.* (See "View, Print and Save the Roster" at Section 6.2.1.)

SECTION 13   CHANGE SCHEDULES

13.0   Overview

The ability to create master schedules resides in SARS Admin, which usually is managed by the system administrator. End users who have been granted access rights to create master schedules and add them to THE GRID should refer to "Master Schedules" at Section 15.

SARS Anywhere offers several methods for changing one or more elements of a schedule from THE GRID or MY GRID, which are discussed in this section. You must have access rights to change a schedule to use this feature.

13.1   Use Quick Day Change to Change a Schedule

Quick Day Change may be used to change information on a schedule that has already been added to the grids, other than booked appointments.

After a master schedule has been added to the grids, daily adjustments are best made directly on THE GRID or MY GRID, rather than making changes to a master schedule.

1.   From THE GRID or MY GRID, navigate to the desired date.

2.   Click anywhere within the column that contains the time slot(s) to be modified.

> **Note**
> Be sure that the **focus** is in the correct column. Failure to do so may result in the action being taken for the incorrect time slot.

3.   Click the **Quick Day Change Tab**, if it has been configured for easy access,

   -or-

   Click **Quick Links ▼** and select **Quick Day Change** to display the *Quick Day Change* screen. Here is an example:
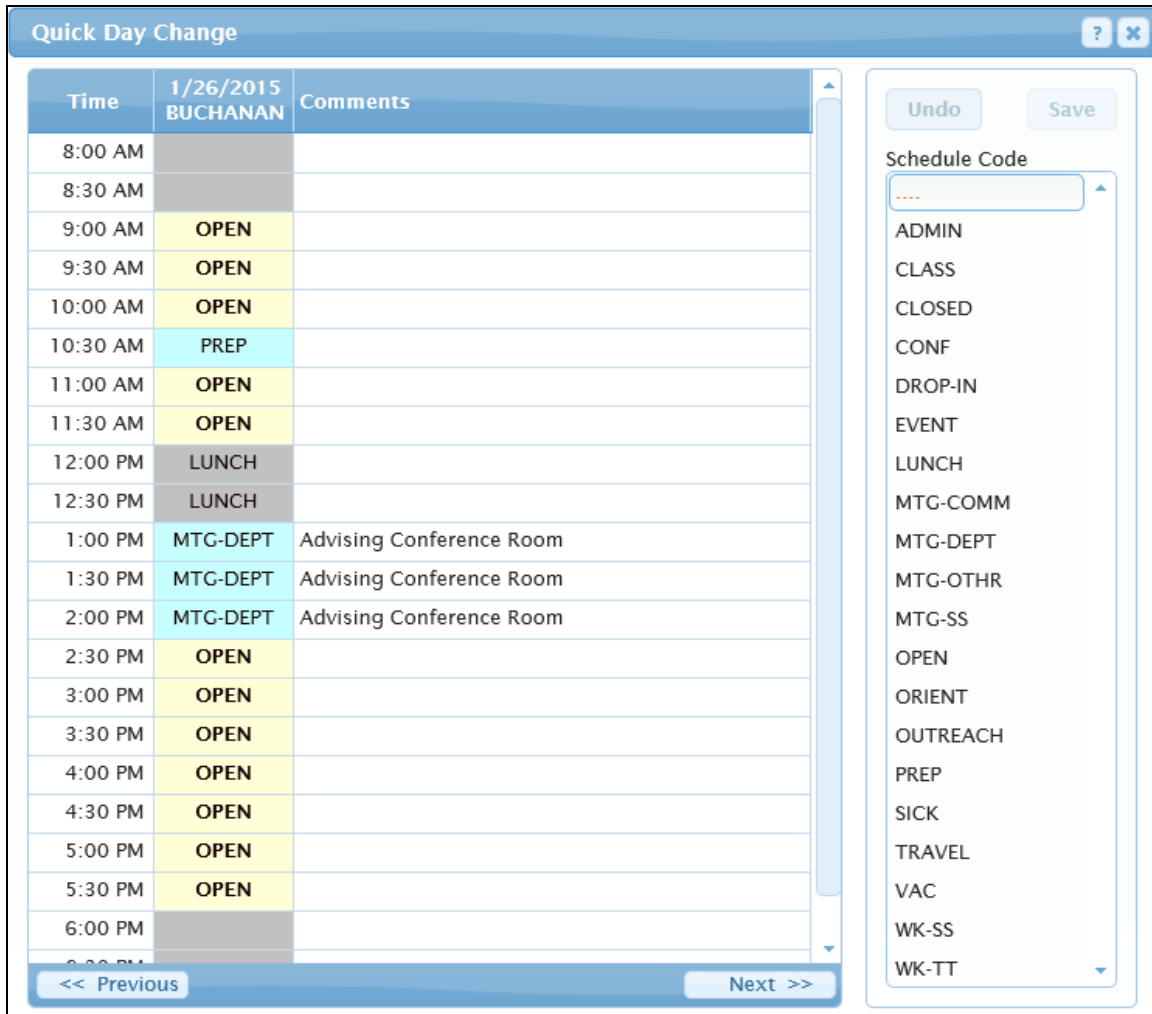
Quick Day Change	
Option	**Description**
Time	Used to display the time on the individual's schedule
[Date/Advisor]	Used to display the date and name associated with the schedule, as well as the code representing the activity for each time slot.
Comments	Use to display existing comments, as well as to enter any comments about the changed activity.
Schedule Code	Use to select the Schedule Code representing the new activity for placement in the desired time slot.
Undo	Use to restore the values in all cells within the column on the Quick Day Change screen to that which was displayed upon entering the screen.
Save	Use to save the changes.
<< Previous	Use to move the screen to the previous date or to the column containing the previous advisor, depending on the display mode (single advisor or multiple advisors).

Quick Day Change	
Option	**Description**
Next >>	Use to advance the screen to the next date or to the column containing the next advisor, depending on the display mode (single advisor or multiple advisors).

4. Review the list of Schedule Codes in the right-hand panel; then click on the Schedule Code that will represent the advisor's new activity.

5. Click on the existing Schedule Code to be overridden. The replacement code will appear in the time slot.

> **Notes**
> A scheduled appointment must be cancelled or moved before it can be replaced by another Schedule Code.
>
> If the replacement code is <u>longer</u> than the standard time slot, the extra time slots linked to the activity will be inserted as well. The replacement code will not be inserted if the total space needed for the extended activity is unavailable because of a pre-existing booked appointment or insufficient time remains at the end of the day.
>
> If the length of the replacement activity is <u>shorter</u> than the length of the existing activity, the replacement code will be inserted only in the cell that is clicked (and any subsequent time slot(s), if the replacement code is longer than the standard time slot). The remaining time slots will revert to the Default Master Schedule Code.

6. To record comments about the activity, follow the steps below:

    a. Position the cursor with the focus anywhere on the line in the **Comments** column.

    b. Right-click to enable the space for typing.

    c. Type the specific information about the activity in the space provided, which will allow up to 255 characters.

    d. When done, press **Enter**.

7. To duplicate both the Schedule Code and the comments in other cells, hold the mouse button down and drag the cursor down into each adjacent cell to receive the code (a rectangle shape will be displayed during the dragging process). When the mouse button is released, the code and any comments will be placed into all of the receiving cells. In lieu of the lasso action, the user may also simply click on one cell after another, as needed.

8. Two methods are available to correct an error before exiting the *Quick Day Change* screen, as follows:

    a. To override an incorrect Schedule Code, click on the desired Schedule Code and then click on the cell to be edited.

    b. To restore an entire column to the values it had before using *Quick Day Change*, click **Undo**.

9. Then press **Save**.

Tip
To find adjacent dates that are not currently displayed, use **Next >>** or **<< Previous** at the bottom of the Quick Day Change screen. In multiple advisor mode, **Next >>** will advance to the advisor in the next column and **<< Previous** will display the advisor in the previous column. In single advisor mode, **Next >>** will advance to the next date and **<< Previous** will display the previous date for the same advisor.

10. When done, exit the screen.

13.2   Change All or Part of a Column to the Same Schedule Code

You may use the *Change Column* screen while on THE GRID or MY GRID to change all or part of a column for a specified time and date range to the same Schedule Code. Change Column functions <u>only</u> if no scheduled appointments are contained in the column to be changed.

1.   On THE GRID or on MY GRID, click on any time slot within the column to be modified.

   Note
   Be sure that the **focus** is within the column to be changed when on THE GRID. (On MY GRID, the focus may be anywhere on the screen.)

2.   Click **Quick Links ▼** and select **Change Column**. A screen, such as the following, will be displayed:

Change Column	
Option	**Description**
Change to Schedule Code	Use to specify that the column will be changed to the Schedule Code that is selected from the adjacent field.
Reset to Master Schedule	Use to specify that the column will be reset to the Master Schedule for that day of the week.
Start Time	Use to select the earliest time for which the column should be changed.
Stop Time	Use to select the latest time slot for which the column should be changed.
Start Date	Use to specify the earliest date for which the change will be made.

Change Column	
Option	**Description**
Stop Date	Use to specify the last date for which the change will be made.
Comments	Use to enter any comments to be associated with the Schedule Code.
OK	Use to save the changes and exit the screen.
Cancel	Use to exit the screen without saving.

3. Click **Change to Schedule Code ▼** and select the Schedule Code that signifies the advisor's new activity.

> **Note**
> Schedule Codes that are longer than the standard time slot will not be available for use.

4. Click **Start Time ▼** and select the first time slot to which the change will apply.

5. Click **Stop Time ▼** and select the last time slot to which the change will apply.

6. Click on the **Start Date** field and type in the earliest date that should accept the new Schedule Code, or use the Date Picker. (See Date Picker at Appendix B)

7. Click on the **Stop Date** field and type in the last date that should accept the new Schedule Code, or use the Date Picker.

8. To enter a corresponding comment for the activity, type any comments in the space provided under **Comments**, which will allow up to 255 characters.

9. Click **OK**. A confirmation message will be displayed.

10. Click **Yes**.

13.3   Reset a Column to the Master Schedule

You may use **Change Column** while on THE GRID or MY GRID to reset an entire column of Schedule Codes back to the original codes on the advisor's Master Schedule for that day of the week. Change Column functions <u>only</u> if no scheduled appointments are contained in the column to be changed and only if the date is encompassed on the Master Schedule.

1. On THE GRID or MY GRID, click anywhere within the column to be modified.

> **Note**
> Be sure that the **focus** is within the column to be changed.

2. Click **Quick Links ▼** and select **Change Column**.

3. Click **Reset to Master Schedule**.

4. Click on **OK**. A confirmation message will be displayed.

5. Click **Yes** to confirm the action.

13.4   Lock or Unlock a Column

You may use **Lock Column** and **Unlock Column** to lock or unlock a column. A locked column blocks out an advisor's day so that no appointments may be scheduled for that individual. An unlocked column makes the day available for appointments once more. While the column is locked, only the person who locked it, or a system administrator with User Name Maintenance access rights, may cancel or reschedule appointments in that column, or unlock the column.

1. **To lock a column**,

    a. On THE GRID or MY GRID, click anywhere within the column to be locked.

        Note
        Be sure that the **focus** is within the column to be locked.

    b. Click **Quick Links ▼** and select **Lock Column**. A confirmation message will be displayed.

    c. Click **Yes**. A locked padlock icon will be placed in the header of THE GRID for the selected day and will remain until the column is unlocked.

    d. Print the Cancellation/Rescheduling Worksheet for that individual for that date (see "Cancellation/Rescheduling Worksheet" in the SARS Anywhere Reports Manual at Section 1.4).

        Tip
        The locking mode also may be initiated directly from the Cancellation/ Rescheduling Worksheet setup screen (see the SARS Anywhere Reports Manual at Section 1.4).

    e. After locking the column, you may wish to cancel or move all scheduled appointments for that individual on that date. Then replace all available appointment time slots with Schedule Codes that do not permit appointment scheduling (e.g., SICK).

        Note
        At this point, you may either leave the column locked, or you may unlock it.

2. **To unlock a column**,

    a. On THE GRID or MY GRID, click anywhere within the column to be unlocked.

        Note
        Be sure that the **focus** is within the column to be unlocked.

    b. Click **Quick Links ▼** and select **Unlock Column**. A confirmation message will be displayed.

    c. Click **Yes**. The column will now be available for use by any user with scheduling access rights in that Location.

13.5   Make Recurring Meetings

A simple method exists for scheduling multiple, recurring meetings for one advisor at a time. Scheduling recurring meetings is useful for advisors or other staff who need to meet on a regular basis.

1. From THE GRID or MY GRID, click **Quick Links ▼** and select **Recurring Activities**.

Here is an example of the left-hand side of the screen for <u>Weekly</u> recurrences with Meeting selected:

Here is an example of the left-hand side of the screen for <u>Monthly</u> recurrences with Meeting selected:

Recurring Activities				
Option		**Description**		
Activity Information	Type	Appointment	Use to select the option to schedule a recurring appointment.	
		Meeting	Use to select the option to schedule a recurring meeting.	
	Short Name	Use to select the advisor for whom a recurring meeting is to be scheduled.		
	Start Time	Use to select the time at which the recurring meeting will begin.		
	Duration	Use to select the length of time needed for the recurring meeting.		
	Start Date	Use to select the earliest date for which the recurring meeting will be scheduled.		
	Stop Date	Use to select the latest date for which the recurring meeting will be scheduled.		
Recurrence	Frequency	Weekly	Use to schedule a weekly meeting.	
		Monthly	Use to select the option to schedule a monthly meeting.	
	[Weekly] Every ☐ Weeks(s)	Use with the Weekly option to select the frequency of the weekly meeting to be scheduled.		
		Sunday	Use to schedule the meeting on a Sunday.	
		Monday	Use to schedule the meeting on a Monday.	
		Tuesday	Use to schedule the meeting on a Tuesday.	
		Wednesday	Use to schedule the meeting on a Wednesday.	
		Thursday	Use to schedule the meeting on a Thursday.	
		Friday	Use to schedule the meeting on a Friday.	
		Saturday	Use to schedule the meeting on a Saturday.	
	[Monthly] Every ☐ [occurrence]	Use with the Monthly option to select the occurrence of the Monthly meeting to be scheduled.		
		1st	Use to schedule the meeting on the first specified day of the month.	
		2nd	Use to schedule the meeting on the second specified day of the month.	
		3rd	Use to schedule the meeting on the third specified day of the month.	

Recurring Activities			
Option		**Description**	
		4th	Use to schedule the meeting on the fourth specified day of the month.
		Last	Use to schedule the meeting on the last specified day of the month.
Find		Use to have the system search for available dates based on the selected criteria and display the results.	
Reset		Use to clear the Recurrence panel for new entries.	
Results		Used to display the number of occurrences for the selected date range for the criteria selected and to make a selection.	
Details		Use to display all details for a selected result.	
Book		Use to book the selected date for the meeting.	

2. In the Activity Information - Type panel,

    a. Click **Meeting**.

    b. Click **Short Name ▼** and select the name of the advisor for whom the recurring meeting is to be scheduled.

    c. Click **Start Time ▼** and select the time at which the recurring meeting will begin.

    d. Click **Duration ▼** and select the length of time needed for the meeting.

    e. Click the **Start Date** field and type in the first date on which a recurring meeting will be scheduled, or use the Date Picker. (See "Date Picker" in Appendix B.)

    f. Click the **Stop Date** field and type in the last date on which a recurring meeting will be scheduled, or use the Date Picker.

3. In the Recurrence panel,

    a. Click **Weekly** to schedule the meeting on a weekly basis. Then,

        i) Click **Every □ Week(s)** and type in the frequency of the weekly meeting.

        ii) Click the specific day(s) of the week on which the weekly meeting will be scheduled. More than one day may be selected.

            [**Example**: Selecting **Weekly > Every 2 Weeks > Monday** will return results for every other Monday, starting the next Monday that occurs after today.]

    -or-

    b. Click **Monthly** to schedule the meeting on a monthly basis. Then,

        i) Click the applicable checkbox adjacent to **Every 1st**, **2nd**, **3rd**, **4th**, or **Last** to specify the day of the month the meeting is to be scheduled.

ii)   Click the specific day(s) of the week on which the monthly meeting will be scheduled. More than one day may be selected.

[**Example**: Selecting **Monthly > 2nd > Monday** will return results for the second Monday of every month, starting the next second Monday.]

4.   Click **Find**. The Results panel will display the total number of occurrences for the selected date range and day of week. Here is an example.

Note If a date that meets meeting the specified criteria is unavailable, the system ignores it. Separate results will be returned for date ranges that are broken by an unavailable date.

5.   In the Results panel, check the desired row(s) to display the details. The screen will display the Date and Day of Week of each result found. More than one row may be selected by pressing the Control key.

Here is an example of the screen showing the details after the desired results have been selected:

Recurring Activities   ? ✖

Activity Information

Type
○ Appointment   ● Meeting

Short Name
ADAMS ▾

Start Time   **Duration**
11:00 AM ▾   60 ▾

Start Date   **Stop Date**
08/17/2015   12/11/2015

Recurrence

Frequency
● Weekly   ○ Monthly

Every 1 week(s)

☐ Sunday   ☑ Monday
☐ Tuesday   ☐ Wednesday
☐ Thursday   ☐ Friday
☐ Saturday

[Find]   [Reset]

Results

Start Date	Stop Date	# Occurrences
8/17/2015	8/31/2015	3
9/14/2015	11/2/2015	8
11/16/2015	12/7/2015	4

Details

■	Date	Day of Week	
☑	8/17/2015	Monday	
☑	8/24/2015	Monday	
☑	8/31/2015	Monday	
☑	9/14/2015	Monday	
☐	9/21/2015	Monday	
☑	9/28/2015	Monday	
☐	10/5/2015	Monday	
☐	10/12/2015	Monday	
☑	10/19/2015	Monday	
☑	10/26/2015	Monday	
☑	11/2/2015	Monday	
☑	11/16/2015	Monday	
☐	11/23/2015	Monday	
☐	11/30/2015	Monday	
☑	12/7/2015	Monday	

[Book]

6.   Check the box adjacent to each date or check the box in the Details panel header to automatically select all dates for which the recurring meeting should be booked.

7.   When all possible dates have been selected for the recurring meeting, click **Book**. A *Recurring Activity Details* screen will be displayed. Here is an example:

Recurring Activity Details	
Option	**Description**
Schedule Code	[Enabled only when Meeting is selected] Use to select the Schedule Code to be used as the replacement code for the recurring meeting (e.g., MTG).
Comments	[Enabled only when Meeting is selected] Use to type in relevant comments or a description of the recurring meeting (e.g., Weekly Staff Meeting).
OK	Use to store the selections.
Cancel	Use to exit the screen.

8. Click **Schedule Code ▼** and select the Code to be inserted on THE GRID to represent the meeting type.

9. Click the **Comments** field and type in comments to be associated with the recurring meeting. After typing in this field, the OK button will be enabled.

10. Click **OK** to confirm the meetings and exit the screen.

This action reserves the slot(s) on THE GRID for all of the selected dates. The new meeting Schedule Code will be displayed on THE GRID for those dates and times.

SECTION 14   INSTANT MESSAGING

14.0   Overview

Users can send and receive messages if the SARS·Chat feature has been established for the database. In addition, if Enable Notification of Appointment Arrival has been established for the Location, advisors will receive automated messages that students have arrived for their appointments via Instant Messaging.

The method for configuring Instant Messaging on an individualized basis is discussed at Section 4.3. This section discusses how to establish your own availability to chat and also how to send, respond to, and broadcast messages.

The SARS·Chat icon is a lightning bolt located on the tool bar after logging in to SARS Anywhere.

↓

Note If a user opts to use Desktop Chat in lieu of SARS·Chat, access to that feature will be via a lightning bolt located on the system tray at the bottom of the screen. See Section 14.2, below.

14.1   Use SARS·Chat

14.1.1   Establish Availability to Chat

1. From SARS Anywhere, hover the cursor over the lightning bolt located on the on the tool bar. A *Chat Availability* menu will be displayed. Here is an example:

Chat Availability	
Option	**Description**
Available	Use to indicate that you are available to chat. Your availability will be notated for others to see.
Busy	Use to indicate that you are busy. Others will see that you are busy at present, but you will be able to see that someone wants to chat with you.
Do Not Disturb	Use to indicate that you do not wish to receive or respond to chat messages. Others will see the Do Not Disturb indicator by your name. Only appointment notifications will be sent to you.

2. Click the desired option.

34. Return to the *Chat Availability* menu at any time to change your status.


14.1.2 Send a Message

Two options are available for sending messages: Chat with User and Broadcast.

1. From SARS Anywhere, click the lightning bolt icon located on the tool bar. A *SARS Chat* screen will be displayed showing a list of users and their chat status. Here is an example.

User Name	Status
John Adams	Available
Franklin Pierce	Available
Franklin Delano Roosevelt	Do Not Disturb
Abraham Lincoln	Busy
James K. Polk	Available
John Tyler	Available
George Washington	Offline
Andrew Jackson	Offline
James Madison	Offline
James Monroe	Offline
Andrew Johnson	Offline

SARS Chat - (11) user(s)

[Only My Location]   [Chat With User]   [Broadcast]

Note
To display only those users who belong to your primary location, click the **Only My Locations** filter.

2. Proceed to follow the steps at Section 14.1.3, Chat With User or Section 14.1.4, Broadcast a Message.

14.1.3 Chat With User

1. Click on the individual to whom the message will be sent. This will enable the **Chat With User** button.

2. Click **Chat With User** to display a *Chat* screen. Here is an example:
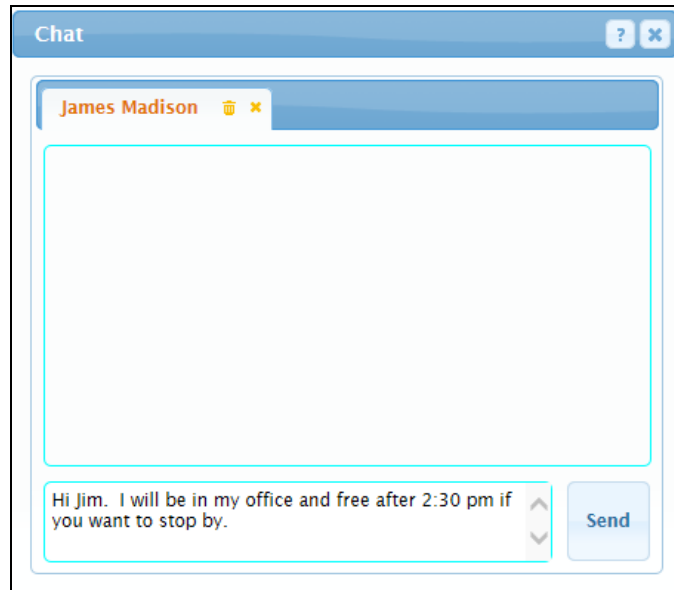
3.   Type your message in the space provided.

4.   Click **Send**. The message will be sent immediately.

5.   Click **X** to close the screen.

14.1.4   Broadcast a Message

1.   Click **Broadcast** to open the *Broadcast Message* screen. Here is an example:
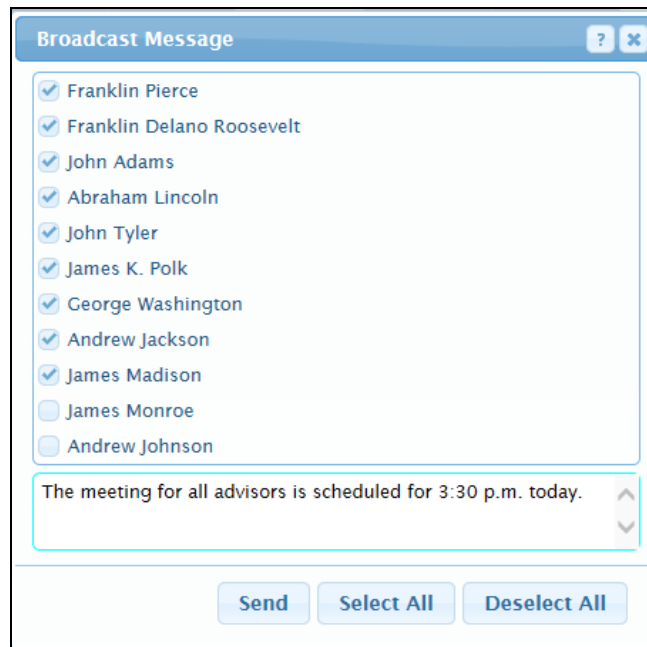
2.   Click the checkbox adjacent to each recipient to whom the message will be sent, or click **Select All** to check all boxes on the list.

3. Click in the Message panel and type the desired broadcast.

4. When done, click **Send**. The message will be broadcast immediately.

5. Click **X** to close the screen.

14.1.5 Respond to a Message

Users may have the option to receive both automated appointment notifications and personal messages.

1. If you receive a personal message, it might look like this:

a. Click **Respond** to enable a Message panel.

b. Type a response. This will enable a **Send** button. Here is an example:

c. When done, click **Send**.

d. Click **X** to close the screen.

2. If you receive an appointment reminder notification, the screen will include a snooze option, if it has been activated as an option on the *SARS Chat* configuration screen. Here is an example:

a. Note that the **Snooze ▼** field defaults to 5 Minutes. If desired, click **Snooze ▼** and select the number of minutes before the reminder is sent again; then click **Snooze**. The message will close and be resent at the specified frequency.

   -or-

b. Note the message and then click **X** to close the screen. This action will deactivate the snooze function.

14.2   Use Desktop Chat

14.2.0 Overview

Desktop Chat does not require that users be logged in to SARS Anywhere in order to send or receive messages. However, Desktop Chat has the following limitations:

- Desktop Chat works only on Windows systems.
- Sent and received messages are not color-coded.
- Multiple conversations are displayed as separate Windows.
- To start up Desktop Chat, the user must login the first time.
- If Use Desktop Chat is selected, the Chat option in SARS Anywhere will be disabled.
- If you launch Desktop Chat on more than one active computer, messages will be sent only to the first computer that launched with Windows.

The desktop chat menu looks like this:
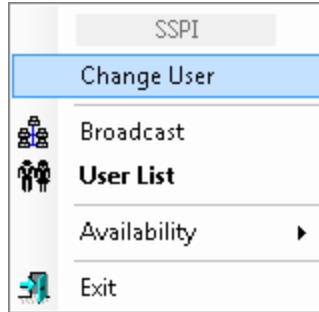
Desktop Chat Menu	
Option	**Description**
Change User	Use to log out of Desktop Chat and sign in as a different user.
Broadcast	Use to select users to whom a broadcast message will be sent and to write a broadcast message.
User List	Use to view a list of all users, users in your primary Location, as well as the availability status of each user.
Availability	Use to select your availability to chat. Your availability will be notated for others to see on their User List.
Exit	Use to exit Desktop Chat. This will remove the lightning bolt icon from the system tray. To restore chat, re-start the computer, as Desktop Chat automatically launches with Windows.

Note
If you are using the web-based Chat application, the menu will indicate that you are using web-based Chat. To change this status, go back to SARS Anywhere, navigate to the SARS·Chat Configuration screen and check **Use Desktop Chat**.

14.2.1 Login to Desktop Chat

The first time that a user wants to use Desktop Chat, a login screen will be displayed. Here is an example:

1. Click the **Desktop Chat** icon located on the system tray at the bottom of the screen.

2. Click the **SARS Anywhere URL** field and specify the URL for the college's installation of SARS Anywhere.

3. Click **Go**.

4. Click **Database ▼** and select the SARS database through which chat messages are being sent.

5. Click the **Username** field and enter your username.

6. Click the **Password** field and enter your password.

7. Click **Login**. Subsequently, the Desktop Chat program will automatically launch with Windows.

8. To logout and sign back in as a different user, click **Change User**, and then follow the login steps 1 – 7, above.

14.2.2 Establish Availability to Chat (Desktop Chat)

1. Right-click on the lightning bolt on the system tray at the bottom of the screen to display the Desktop Chat menu.

2. Hover the cursor over the **Availability** option to display a *Chat Availability* menu will be displayed. Here is an example:
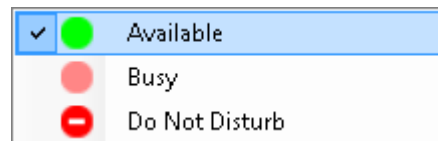
Desktop Chat Availability	
Option	**Description**
Available	Use to indicate that you are available to chat. Your availability will be notated for others to see.

Desktop Chat Availability	
Option	**Description**
Busy	Use to indicate that you are busy. Others will see that you are busy at present, but you will be able to see that someone wants to chat with you.
Do Not Disturb	Use to indicate that you do not wish to receive or respond to chat messages. Others will see the Do Not Disturb indicator by your name. Only appointment notifications will be sent to you.

3. Click the desired option.

4. Return to the *Chat Availability* menu at any time to change your status.

14.2.3 Send a Chat Message (Desktop Chat)

1. Right-click the lightning bolt icon located on the system tray at the bottom of the screen.

2. Click **User List** to display a *Desktop Chat – User List* screen showing a list of users and their chat status. Here is an example.

Note
To display only those users who belong to your primary location, click the **Only My Locations** filter.

3. Click **Chat** to display a *Chat* screen. Here is an example:
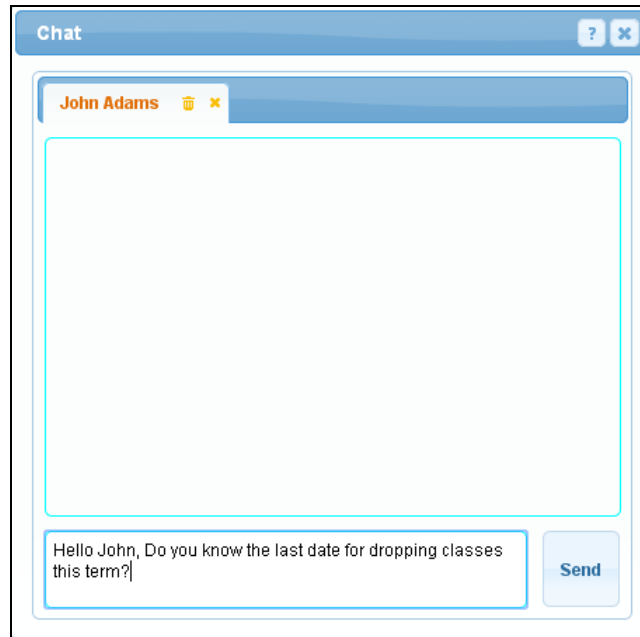
4. Type your message in the space provided.

5. Click **Send**. The message will be sent immediately.

6. Click **X** to close the screen.

14.2.4 Broadcast a Message (Desktop Chat)

1. Right-click the lightning bolt icon located on the system tray at the bottom of the screen.

2. Click **Broadcast** to open the *Broadcast Message* screen. Here is an example:
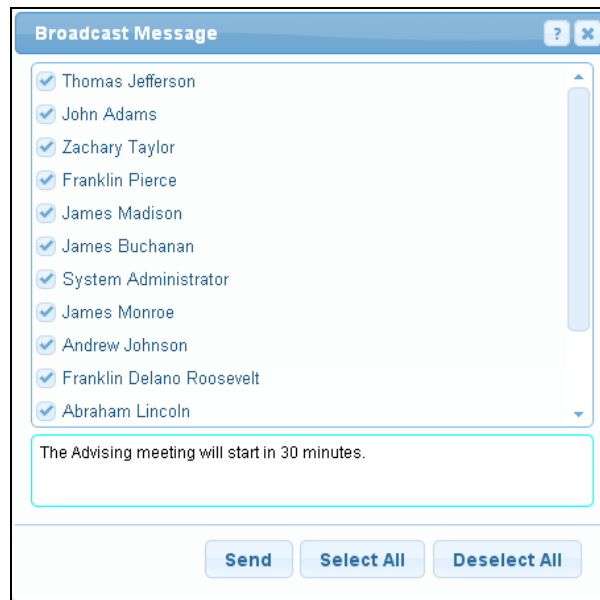
3. To display only those users in your primary Location, click **Only My Location**.

4. Click the checkbox adjacent to each recipient to whom the message will be sent, or click **Select All** to check all boxes on the list.

5. Click in the Message panel and type the desired broadcast.

6. When done, click **Send**. The message will be broadcast immediately.

7. Click **X** to close the screen.

14.2.5 Respond to a Message (Desktop Chat)

Users may have the option to receive both automated appointment notifications and personal messages.

1. If you receive a personal message, it might look like this:

a. Click **Respond** to enable a Message panel.

b. Type a response. This will enable a **Send** button. Here is an example:

c.   When done, click **Send**.

d.   Click **X** to close the screen.

2.   If you receive an appointment reminder notification, the screen will include a snooze option, if it has been activated as an option on the *SARS Chat* configuration screen. Here is an example:

a.   Note that the **Snooze ▼** field defaults to 5 Minutes. If desired, click **Snooze ▼** and select the number of minutes before the reminder is sent again; then click **Snooze**. The message will close and be resent at the specified frequency.

     -or-

b.   Note the message and then click **X** to close the screen. This action will deactivate the snooze function.

SECTION 15   MASTER SCHEDULES

15.0   Overview

A Master Schedule holds an advisor's basic weekly schedule of activities. Recording a Master Schedule refers to the action of entering on a template an individual's activities for <u>one</u> week. Master Schedules will display only Monday through Friday, unless the option to Include Saturday/Sunday has been selected for this Location. After Master Schedules are recorded, they must be added to THE GRID.

Here is an example of the *Master Schedule* screen when it has been generated as a Tab.

Master Schedules		
Option		**Description**
Template Description		Use to record a name for a master schedule template.
Date Range		Use to establish or change the first and last date of a work schedule.
Options	[button]	[Available if the Master Schedule is generated from Quick Links] Use to gain access to the following features: Add to THE GRID, Column Operations, Print, and Template Operations. (See definitions below.)
	Add to THE GRID	Use to transfer a Master Schedule template to THE GRID for use in scheduling.
	Column Operations	Use to copy or reset a column on a Master Schedule template.

Master Schedules		
Option		**Description**
	Print	Use to print the Master Schedule template.
	Template Operations	Use to add a blank template, add a template based on an existing template, copy a template, reset a template or delete a template.
Undo		Use to restore the values in all cells on the template to that which was displayed upon entering the screen.
Save		Use to store the entries made on the *Master Schedule* screen.
Location		Use to select the Location where the individual will be working.
Short Name		Use to select the Short Name of the advisor for whom the schedule is being recorded.
Template		Use to select a template to be displayed.
Insert Off/On		This is a toggle button. When the button reads "Insert On," clicking on a cell will copy the selected Schedule Code and any corresponding comments into that cell. When the button reads "Insert Off," the Insert function is disabled.
Schedule Code		Use to select a schedule code to be placed in one or more time slots on the Master Schedule.

Note
Look at the checkboxes that are located above each day of the week. The system defaults to all dates being checked. If the advisor does not have a schedule for a particular day of the week (e.g., adjunct advisors), uncheck the box for that day. Only those days that are checked will be added to THE GRID for that advisor. These checkboxes will be used when it is time to add a Master Schedule to THE GRID.

This Section also discusses how to add to THE GRID, which refers to the action of replicating that Master Schedule across a designated date range (for example, one semester) and placing the entire schedule on the scheduling screen.

15.1   Record a Master Schedule

Master Schedules will display only Monday through Friday, unless the option to *Include Saturday/Sunday* has been selected for this Location. Up to ten templates may be created per advisor per Location.

1. Log in to SARS Anywhere.

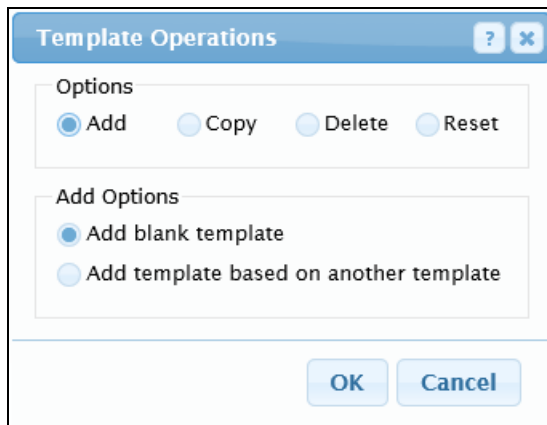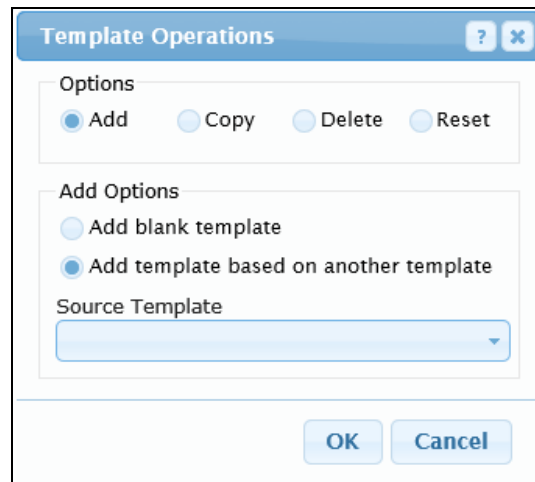2. Click the **Master Schedule Tab**, if it has been configured for easy access,

    -or-

    Click **Quick Links ▼** and select **Master Schedule**.

3. Note the template that is displayed. It may be "blank," containing only the Default Master Schedule Code in all time slots, or it may be a template that contains a previously-established schedule. This template may be used to record a new schedule, or a different template may be selected by navigating to the right-hand column and clicking **Template ▼** to display a menu of existing templates and then selecting the desired template as a starting point. A panel listing Schedule Codes will also be displayed.

    Note If you want to simply add a new blank template, see "Add a Blank Template" at Section 15.2.)

4. Note the **Location field**. If necessary, click **Location ▼** and select the Location for which this schedule will be created. The alphabetical list will include all Locations to which the individual has been assigned, and to which the user who is creating the Master Schedule has been assigned access.

5. Note the **Short Name** field. If necessary, click **Short Name ▼** and select the desired name. An advisor using the Master Schedule will have his or her own Short Name displayed and the Short Name field will be unchangeable.

6. Click **Template Description ▼** and enter the name for the schedule (e.g., Spring Peak Reg or Spring Standard).

7. Note that the fields for Date Range display today's date. Click the first **Date Range** field and type over the existing date with the <u>first</u> date to be included on the advisor's Master Schedule template, or click ▼ to use the Date Picker. (See "Date Picker" in Appendix B.) The field will accept up to 10 characters.

    Notes

    Each subsequent template, when created, will contain a Date Range that begins one day after the Stop Date of the previous template.

    To view the day of the week for the Start Date or the Stop Date, rest the cursor on the field.

8. Click the other **Date Range** field and type over the existing date with the <u>last</u> date to be included on the Master Schedule template, or click ▼ to use the Date Picker. (See "Date Picker" at Appendix B) The field will accept up to 10 characters.

9. Click **Insert Off**. The button will change to **Insert On**. This will make the Schedule Codes on the list available for copying to the schedule.

10. Click the selected **Schedule Code**.

11. Click the **time slot** on the Master Schedule that is to receive the selected Schedule Code. The code will appear in the cell.

    Notes

    Schedule Codes that have a longer duration than the default duration will fill the number of time slots necessary to cover that duration. If a Schedule Code with a longer duration is overridden by a Schedule Code with a shorter duration, the remaining time slots will revert to the Default Master Schedule Code.

    To correct any errors when placing Schedule Codes in time slots, simply click on the replacement Schedule Code in the right hand column and click on the time slot to be corrected. To restore the template to the values that were displayed upon entering the screen, click **Undo**.

12. To record comments about the activity, follow the steps below:

    a. Position the cursor with the focus anywhere on the activity for which comments are desired.

    b. Right-click to display a comments screen.

    c. Type the specific information about the activity in the space provided, which will allow up to 255 characters. Information entered in the Comments field, such as the specific description of the activity and the room number, will be displayed on MY GRID, the Roster Report, and the Daily

Report (landscape version). The comments will also be displayed on THE GRID for any non-appointment allowable codes, if that option is selected.

Note

Comments are associated with the specific activity denoted by the cell, not with a Schedule Code. This allows you to record different comments while using the same Schedule Code. For example, you may record Staff Meeting as the comment for one cell and Academic Senate Meeting for another. Both cells would display the same Schedule Code of MTG.

---

d. Click **OK**.

Warning

Before reviewing comments that have already been entered for a time slot, click **Insert On** to toggle it to **Insert Off**. Otherwise, the previously entered comments may be erased.

---

13. To duplicate both the Schedule Code and the comments in other cells, hold the mouse button down and drag the cursor down and/or across the columns into each adjacent cell to receive the code (a rectangle shape will be displayed during the dragging process). When the mouse button is released, the code and any comments will be placed into all of the receiving cells. In lieu of the lasso action, the user may also simply click on one cell after another, as needed.

14. Repeat steps # 8 - 12 as necessary for other Schedule Codes.

15. Click **Save** to save the Master Schedule template.

16. To print a copy of the master schedule shown on the screen,

a. [If the Master Schedule was generated from Quick Links] Click **Options** at the bottom of the Master Schedule and select **Print**.

    -or-

    [If the Master Schedule was generated as a Tab] Click the **Print** icon on the tool bar.

b. Note that the **Short Name** field will display the advisor's Short Name. If necessary, click **Short Name ▼** and select the desired name.

c. Click **Group Summary** to include the total hours and total occurrences for each Schedule Code Group or leave the check box blank to exclude those statistics. (See "Group Codes" in the SARS Anywhere Administrator Manual at Section 5.)

---

d. Note the template description in the Which Template field. To select a different template, click **Which Template ▼** and then select either **All** (to print all reports for the selected advisor) or the desired Master Schedule template (to print that report only).

Note
If you select "All" for Advisor, you are not allowed to select a specific template.

---

e. Click **View** to view and/or print the report. The report is displayed in a pdf format utilizing the pdf viewer that is installed on your system.

-or-

Click **Save** to save the report to a file.

17. To continue entering schedule data for another location, repeat steps # 4-14.

18. When done, exit the screen.

Note
To add the schedules to THE GRID, see Section 15.9, "Add Schedules to THE GRID". If the user does not have access rights to add master schedules to THE GRID, the *Add to the Grid* option will be disabled.

15.2   Add a Blank Template

It may be desirable to retain templates that have been created if they will be useful at other times.

Adding a new template enables the user to create different schedules for a part of a term or for different terms without overwriting the original schedules. Up to ten templates may be created per advisor per Location.

1. Log in to SARS Anywhere.

2. Click the **Master Schedule Tab**, if it has been configured for easy access,

   -or-

   Click **Quick Links ▼** and select **Master Schedule**.

3. Note the **Location field**. If necessary, click **Location ▼** and select the Location for which this schedule will be created.

4. Note the **Short Name** field, which should contain the advisor's Short Name for whom the schedule is being recorded. If necessary, click **Short Name ▼** and select the desired name. An advisor using the Master Schedule will have his or her own Short Name displayed and the Short Name field will be unchangeable.

5. Select **Template Operations** from the **Quick Links ▼** menu if the Master Schedule is displayed as a Tab,

   -or-

   Click **Options** at the bottom of the screen and select **Template Operations** from the menu, if the Master Schedule was generated as a pop-up from Quick Links.

The *Template Operations* screen will display two Add Options, as follows.

6. Note that **Add blank template** is already selected. Click **OK**.

7. Proceed to record a new schedule on the template. (See "Record a Master Schedule" at Section 15.1)

15.3   Add a Template Based on Another Template

1. Log in to SARS Anywhere.

2. Click the **Master Schedule Tab**, if it has been configured for easy access,

   -or-

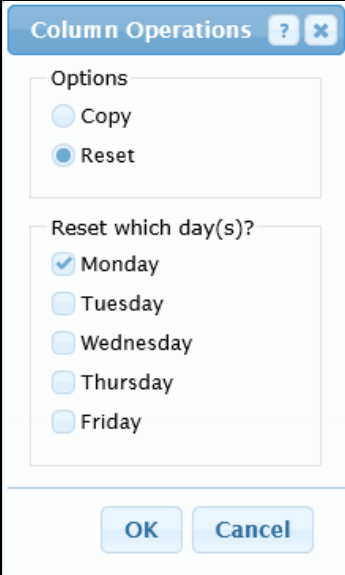   Click **Quick Links ▼** and select **Master Schedule**.

3. Note the **Location field**. If necessary, click **Location ▼** and select the Location in which the template to be used is stored.

4. Note the **Short Name** field, which should contain the advisor's Short Name for whom the schedule is being recorded. If necessary, click **Short Name ▼** and select the desired name. An advisor using the Master Schedule will have his or her own Short Name displayed and the Short Name field will be unchangeable.

5. Select **Template Operations** from the **Quick Links ▼** menu if the Master Schedule is displayed as a Tab,

   -or-

   Click **Options** at the bottom of the screen and select **Template Operations** from the menu, if the Master Schedule was generated as a pop-up from Quick Links. The *Template Operations* screen will display two Add Options, as follows.

6.   Click **Add template based on another template**.

7.   Click **Source Template ▼** to display a list of templates and then click on the template to be duplicated. For an advisor using the Master Schedule, only their own templates are displayed.

   Note For system administrators using this feature, the list of Source Templates will include templates that have been created for other users, as well.

8.   Click **OK**. The new template with the duplicated Master Schedule will be displayed.

   Note Any comments associated with Schedule Codes will be transferred to the new template, if the template is for the same advisor. Otherwise, comments will not be transferred.

9.   Proceed to make any needed modifications to the schedule. (See Section 15.1, "Record a Master Schedule")

15.4   Copy a Template

Copying a template is similar to Add a Template Based on Another Template, but it overwrites an existing (out of date) template with a schedule from another template.

1.   Log in to SARS Anywhere.

2.   Click the **Master Schedule Tab**, if it has been configured for easy access,

   -or-

   Click **Quick Links ▼** and select **Master Schedule**.

3.   Note the **Location field**. If necessary, click **Location ▼** and select the Location for which the other template will be copied.

4.   Note the **Short Name** field, which should contain the advisor's Short Name for whom the schedule is being recorded. If necessary, click **Short Name ▼** and select the desired name. An advisor using the Master Schedule will have his or her own Short Name displayed and the Short Name field will be unchangeable.

5.   Click **Template ▼** and select the template to which data will be copied.

6.   Click **Template Description ▼**and rename the schedule.

7.   Select **Template Operations** from the **Quick Links ▼** menu if the Master Schedule is displayed as a Tab,

 -or-

 Click the **Options** menu at the bottom of the screen and select **Template Operations** from the menu, if the Master Schedule was generated as a pop-up from Quick Links.

8.   Click **Copy**. A Source Template field will be enabled in the Copy Options panel. Here is an example:

9.   Click **Source Template ▼** to display a list of existing templates for the selected individual, and then select on the template containing the schedule to be copied. Advisors only see own templates.

 Note For system administrators using this feature, the list of Source Templates will include templates that have been created for other users, as well.

10. Click **OK**. A confirmation message will be displayed.

11. Click **Yes**. The schedule information will have been copied to the template.

Note
Any comments associated with Schedule Codes will be transferred to the new template.

12. Proceed to make any needed modifications. (See Section 15.1, "Record a Master Schedule.)

15.5   Reset a Template

The Reset function will replace or overwrite the currently used Schedule Codes on the template that is currently in view with the Default Master Schedule Code (e.g., **….**).

1.   Log in to SARS Anywhere.

2.   Click the **Master Schedule Tab**, if it has been configured for easy access,

-or-

Click **Quick Links ▼** and select **Master Schedule**.

3. Note the **Location field**. If necessary, click **Location ▼** and select the Location containing the template to be reset.

4. Note the **Short Name** field, which should contain the advisor's Short Name for whom the schedule is being reset. If necessary, click **Short Name ▼** and select the desired name. An advisor using the Master Schedule will have his or her own Short Name displayed and the Short Name field will be unchangeable.

5. Click **Template ▼** and select the template to be reset.

6. Select **Template Operations** from the **Quick Links ▼** menu if the Master Schedule is displayed as a Tab,

    -or-

    Click **Options** at the bottom of the screen and select **Template Operations** from the menu, if the Master Schedule was generated as a pop-up from Quick Links. Here is an example of the screen:
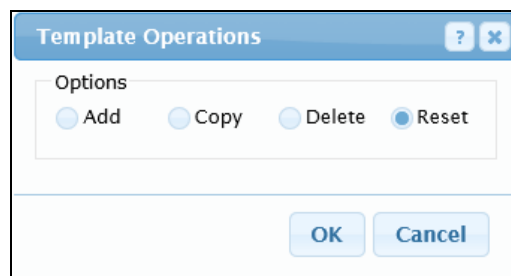
7. Click **Reset.**

8. Click **OK**. A confirmation message will be displayed.

9. Click **Yes**. All of the cells on the template will be restored to the Default Master Schedule Code.

10. Proceed to record a new schedule on the template. (See Section 15.1, "Record a Master Schedule")

15.6   Delete a Template

The Delete function is used to eliminate a template that is no longer needed. If only one template exists, this option will be disabled.

1. Log in to SARS Anywhere.

2. Click the **Master Schedule Tab**, if it has been configured for easy access,

    -or-

    Click **Quick Links ▼** and select **Master Schedule**.

3. Note the **Location field**. If necessary, click **Location ▼** and select the Location in which the template to be deleted is stored.

4. Note the **Short Name** field, which should contain the advisor's Short Name for whom the schedule is being deleted.   If necessary, click **Short Name** ▼ and select the desired name. An advisor using the Master Schedule will have his or her own Short Name displayed and the Short Name field will be unchangeable.

5. Click **Template** ▼ and select the template to be deleted.

6. Select **Template Operations** from the **Quick Links** ▼ menu if the Master Schedule is displayed as a Tab,

    -or-

    Click **Options** at the bottom of the screen and select **Template Operations** from the menu, if the Master Schedule was generated as a pop-up from Quick Links. Here is an example of the screen:
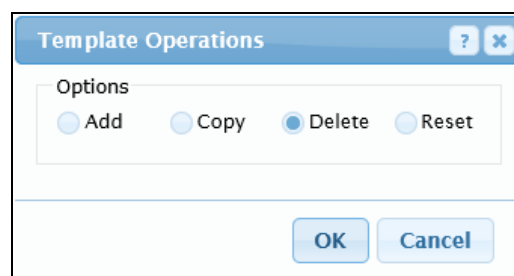
7. Click **Delete**.

8. Click **OK**. A confirmation message will be displayed.

9. Click **Yes**. Any remaining templates will be renumbered automatically.

10. Click **Close**.

15.7   Copy a Column

Copying a column is useful when an advisor's schedule is the same on more than one day of the week. Rather than manually entering the schedule for each similar day, enter a schedule for one day (e.g. Monday) and then copy it to other columns (e.g. Wednesday and Friday). The Copy function eliminates the need to make duplicative entries.

1. Log in to SARS Anywhere.

2. Click the **Master Schedule Tab**, if it has been configured for easy access,

    -or-

    Click **Quick Links** ▼ and select **Master Schedule**.

3. Click **Location** ▼ and select the Location containing the template for which a column will be copied.

4. Click **Template** ▼ and select the template to receive the copied column.

5. Place the cursor anywhere in the column containing the information to be copied.

Note
If the focus of the cursor is not already placed in the source column, first click on the button that reads
"Insert On" to change it to read "Insert Off." Then it will be safe to place the focus in the column
without inadvertently inserting a new Schedule Code.

6. Select **Column Operations** from the **Quick Links ▼** menu if the Master Schedule is displayed as a
    Tab,

    -or-

    Click the **Options** menu at the bottom of the screen and select **Column Operations**, if the Master
    Schedule was generated as a pop-up from Quick Links. Copy is already selected as shown on the
    following screen:
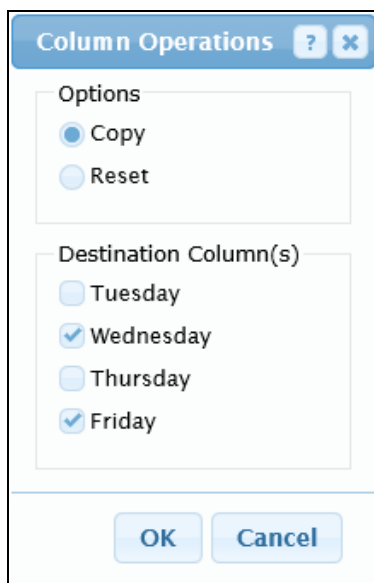
7. Click one or more day(s) in the Destination Column(s) field, which displays all the days of the week
    into which the column may be copied. Notice that the day of the week of the source column is not
    displayed.

8. Click **OK**. A confirmation message will be displayed.

9. Click **Yes**. The column(s) will contain the copied information.

10. Proceed to make any needed modifications or to complete the schedule. (See Section 19.1, "Record
    a Master Schedule")

15.8   Reset a Column

This action will overwrite the existing Schedule Codes with the Default Master Schedule Code in a
selected column.

1. Log in to SARS Anywhere.

2. Click the **Master Schedule Tab**, if it has been configured for easy access,

    -or-

Click **Quick Links ▼** and select **Master Schedule**.

3. Click **Location ▼** and select the Location that contains the template column to be reset.

4. Click **Template ▼** and select the template for which a column is to be reset.

5. Select **Column Operations** from the **Quick Links ▼** menu if the Master Schedule is displayed as a Tab,

    -or-

    Click the **Options** menu at the bottom of the screen and select **Column Operations**, if the Master Schedule was generated as a pop-up from Quick Links.

6. Click **Reset**. The Reset which day(s)? panel will display all the work days of the week. Here is an example:

7. Click each day of the week that represents the column(s) to be reset. More than one column may be selected.

8. Click **OK**. A confirmation message will be displayed.

9. Click **Yes**. All the cells in the selected column(s) will be replaced with the Default Master Schedule Code.

10. Proceed to complete the schedule. (See Section 15.1, "Record a Master Schedule")

15.9   Add a Schedule to THE GRID

Schedules are added to THE GRID by a service running in the background that looks for all schedules that need to be added to the GRID.

Warning

The Excluded Dates for the term must have been entered and selected by the system administrator before anyone attempts to add a work schedule to THE GRID. (See "Excluded Dates" in the SARS Anywhere Administration Manual at Section 9.)

1. Navigate to the *Master Schedule* screen.

2. Click **Location** ▼ and select the Location.

3. Click Template ▼ and select the template to be added

4. Note the checkboxes at the top of each day column. The system defaults to all dates being checked. If the individual does not have a schedule for a particular day of the week (e.g., part-time workers), uncheck the box for that day. Only those days that are checked will be added to THE GRID for that advisor.

5. Click **Quick Links** ▼ and select **Add to the GRID** if the Master Schedule is displayed as a Tab,

    -or-

    Click the **Options** menu at the bottom of the screen and select **Add to the GRID**, if the Master Schedule was generated as a pop-up from Quick Links.

6. A confirmation message will state, "Add to THE GRID request has been submitted." Click **Yes**.

7. When done, exit the *Master Schedule* screen.

8. To confirm that the schedule has been added, go to THE GRID or MY GRID and verify that the advisor's name appears for the date range that was added.

Note

If a master schedule is added while THE GRID or MY GRID is open, the new schedule will not be displayed until the system refreshes.

15.10 Re-Add a Schedule

Warning

The system administrator should have ensured that any Schedule Codes that should not be overwritten are properly designated with the *Prevent Master Schedule Overwrite* option prior to allowing anyone to re-add a schedule. (See "Establish Schedule Code Properties" in the SARS Anywhere Administration Manual at Section 4.2.)

When in doubt, use Quick Day Change from THE GRID or MY GRID to manually change parts of an advisor's schedule.

When re-adding a master schedule, the following cells will be retained:

- Existing appointments

- Any cells containing Schedule Codes that have been marked with the Prevent Master Schedule Overwrite designation

When you are sure that the Prevent Master Schedule Overwrite designations are accurate, proceed to re-add a schedule.

SECTION 16   THE NOTEPAD

16.0   Overview

Notes for a student in a booked appointment time slot may be accessed from MY GRID by clicking on the Notepad icon. The Notepad may also be accessed separately to work with notes about any student.

Users who have permission to Access Notes may view and print existing note(s) to which they have access. Users who have permission to Add Notes may create notes. Users who have permission to Delete Notes may delete their own notes. The Notepad will also display all eAdvising messages for the selected student, which can then be printed or deleted. Finally, if an Additional Information question is used for eAdvising, the Additional Info Response will be displayed on the Notepad.

Here is an example of a Notepad for a selected student who has one Note.

Notepad		
Option		**Description**
Notepad	Location	Used to display the Location in which the note was written.
	Author	Used to display the author of the note. (This information is recorded automatically when a note is saved.)
	Date	Used to display the date that the note was written. (This information is recorded automatically when a note is saved.)
	Title	Used to summarize the contents of the note.
	Note Preview	Used to display the selected note. The date and user name of the author of the note will be embedded at the top of this space.
Student ID		Use to display or enter the student identifier (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID, Guest ID).
Student Name		Use to display or enter the student's name.

Notepad	
Option	**Description**
Search	Use to search for a Student ID by using the Student Name.
Clear	Use to clear the Notepad for another entry in ID or Name.
Add	Use to make fields available to enter new data.
Delete	Use to delete a note.
Print	Use to print a note.
My Templates	Use to gain access to a screen listing one's own template (if the system administrator has established the option).

16.1   Methods for Gaining Access to The Notepad

16.1.1. From a Booked Appointment on THE GRID or MY GRID

1. With the focus on the booked appointment time slot for the selected student, click the **Notepad Tab**, if it has been configured for easy access.

    -or-

2. With the focus on the booked appointment time slot for the selected student, click **Quick Links ▼** and select **Notepad**.

    -or-

3. From MY GRID, if this **Notepad** icon is displayed for the booked appointment for the student, click on the **Notepad icon**.

16.1.2   From the Student Appointment Screen or the Student Drop-in Appointment Screen

1. Type the student's identifier in **Student ID** (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID, Guest ID).

    Note
    If the student's ID format is different from that provided in the ID field, click the **Student ID** label to display a menu of available ID formats and select the desired format (e.g., a pre-assigned Guest ID). Then type the student's identifier.

2. If the student's identifier is not known, type the student's name or a portion thereof in **Name** and click **Search**. If matches are not found in the SARS database, a notification message will be displayed. If only one match is found, the student's identifying information will be displayed. If more than one match is found, a list of all students with that name will appear on a *Search Results* screen. From the *Search Results* screen,

    i)   Click the selected name.

    ii) Click **OK**.

3. Click the **Notepad** button.

16.1.3 From Any Place in SARS Anywhere

1. Click the **Notepad** Tab, if it has been configured for easy access.

    -or

    Click **Quick Links** ▼ and select Notepad.

2. If the Notepad has been opened while focused on a time slot that does <u>not</u> contain a booked appointment for a specific student, select one of the options below to enter the student's identifier.

    a. Type the student's identifier in **Student ID** (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID, Guest ID).

Note If the student's ID format is different from that provided in the ID field, click the **Student ID** label to display a menu of available ID formats and select the desired format (e.g., a pre-assigned Guest ID). Then type the student's identifier.

    b. If the student's identifier is not known, type the student's name or a portion thereof in **Name** and click **Search**. If matches are not found in the SARS database, a notification message will be displayed. If only one match is found, the student's identifying information will be displayed. If more than one match is found, a list of all students with that name will appear on a *Search Results* screen. From the *Search Results* screen,

        i)   Click the selected name.

        ii) Click **OK**.

16.2   View, Print or Save a Note

Users may use the Notepad to view a list of notes from all Locations to which they have been given access. In addition, users may print a single note, several selected notes, all notes, or all notes written within a specified date range using the print icon on the tool bar or the print button on the Notepad screen itself. Here is an example of the *Note Print Options* screen.

Note Print Options		
Option		**Description**
Print Options	All	Use to print all notes.
	Date Range	Use to print all notes that were created within a selected date range. Use the From Date and To Date fields to specify the date range.
	Selected	Use to print only the notes that have been highlighted.
From Date		Use in conjunction with the Date Range option to specify the first date to be included in the date range.
To Date		Use in conjunction with the Date Range option to specify the last date to be included in the date range.
View		Use to view the information or to initiate the printing process.
Save		Use to save the information to a file.

16.2.1 View Notes

After gaining access to the *Notepad* for the selected student,

1. Look to see whether the note has an <u>open</u> padlock (🔓). If so, you will be able to view the note. (Authors of notes may view their own notes, regardless of their security status.)

2.   To view a single note or selected notes,

   a. Click on the selected note(s),

      Tip
      To select more than one note, hold down the Control (CTRL) key and select notes that are not consecutive, or hold down the Shift key and click on the first and then the last note in a series.

   b. View the contents of the note(s) in the Preview panel. (The scroll bar may be used to view longer notes.)

16.2.2 Print or Save Notes

After gaining access to the *Notepad* for the selected student,

1. Look to see whether the note has an <u>open</u> padlock (🔓). If so, you will be able to print the note. (Authors of notes may print their own notes, regardless of their security status.)

2.   To print or save one or more selected notes,

   a. Click on the selected note(s),

> **Tip**
> To select more than one non-consecutive note, hold down the Control (CTRL) key while clicking on each note. To select consecutive notes, use the Shift key and then click on the first note and then the last note to be included.

    b.   [If the Notepad was generated from Quick Links] Click the **Print** button on the Notepad itself.

        -or-

        [If the Notepad is generated as a Tab] Click the **Print** icon on the tool bar.

    c.   Note that **Selected** is the default on the *Note Print Options* screen.

    d.   Click **View**. The report is displayed in a pdf format utilizing the pdf viewer that is installed on your system. Paper copies can then be printed from that screen.

        -or-

    e.   Click **Save**.

3.   To print or save <u>all</u> notes,

    a.   [If the Notepad was generated from Quick Links] Click the **Print** button on the Notepad itself.

        -or-

        [If the Notepad is generated as a Tab] Click the **Print** icon on the tool bar.

    b.   Click **All** on the *Note Print Options* screen.

    c.   Click **View**. The report is displayed in a pdf format utilizing the pdf viewer that is installed on your system. Paper copies can then be printed from that screen.

        -or-

    d.   Click **Save**.

4.   To print or save all notes within a specified <u>date range</u>,

    a.   [If the Notepad was generated from Quick Links] Click the **Print** button on the Notepad itself.

        -or-

        [If the Notepad is generated as a Tab] Click the **Print** icon on the tool bar.

    b.   Click **Date Range** on the *Note Print Options* screen.

    c.   Click on the **From Date** field and type in the first date to be included, or use the Date Picker. (See "Date Picker" in Appendix B.)

    d.   Click on the **To Date** field and type in the last date to be included, or use the Date Picker.

    e.   Click **View**. The report is displayed in a pdf format utilizing the pdf viewer that is installed on your system. Paper copies can then be printed from that screen.

        -or-

f.   Click **Save**.

5.   To close the screen, click **X** at the upper right of the screen.

Tip
To clear the screen for another entry in ID or Name, click **Clear**. Then enter a new identifier or enter a new name and click **Search**.

---

6.   When done, exit the Notepad.

16.3   Add a Note

After gaining access to the *Notepad* for the selected student,

1.   Click **Add** to display a *Note Detail* screen.

Here is an example:

Note Detail		
Option		**Description**
Note Visibility	Local	[Default setting] A Local note may be viewed and printed by all users who have Access Notes permission in the <u>same</u> Location in which the note was written. The padlock icon will be displayed as unlocked 🔓 . In some circumstances, authors may wish to share a Local Note with one or more users who otherwise would not be able to view it. This special circumstance can be addressed by the system administrator assigning the applicable permission to those users. This option is discussed in the SARS Anywhere Administrator Manual at Section 15.5, "Special Situations".

Note Detail		
Option		**Description**
	Private	A Private note may be viewed and printed only by the author of the note. If anyone other than the author clicks on such a note, a message will state that viewing access on that note is restricted. If a note has been marked as Private, the padlock icon will be displayed as locked 🔒. When adding a note, if the author does not see Private as a note visibility option, the system administrator for the Location has not selected the option.
	Public	A Public note may be viewed and printed by <u>all</u> users who have *Access Notepad* permission in <u>any</u> one Location, regardless of the location in which the Public note was written. Authors should use caution before designating a note as Public. The padlock icon will be displayed as unlocked 🔓.
Location		Use to select the location for which the note is being written.
Note Information	Author	Used to display the author of the note.
	Date Created	Used to display the date the note was written.
	Student ID	Used to display the student's ID.
	Student Name	Used to display the student's name.
Note	Title	Use to enter a title or description of the note.
	Note	Use to type the actual note.
Append		Use to add information to an existing note. Only the author of the note may append to it, unless the user is a manager with higher level access rights.
Template		Use to add information using a pre-existing template. See Section 16.6 and 16.7, below.
OK		Use to save the entries.
Cancel		Use to exit the Notepad without saving the entries.

2. From the Note Detail screen, click **Note Visibility** ▼ and select the security level desired for the note. (You may change the option at any time.)

3. Note that the Location field will default to the user's primary Location. If the user wishes to add notes in a different Location and that user has been granted access rights to do so in the other Location, click **Location** ▼ and select the Location for which the note is being written.

4. Click on the **Title** field and then type a description that summarizes the content of the note. The field will allow up to 50 characters.

5. Click in the space provided under Note and type the note. The field will allow up to 65,000 characters (approximately five pages per note) and an unlimited number of notes per student.

6. Click **OK**.

7. To clear the *Notepad* for another entry in ID or Name, click **Clear**. Then enter a new ID or enter a student name and click Search. Then repeat steps 1 - 6 in this section, as desired.

8. When done, exit the Notepad.

Warning
Changes cannot be made to the note after saving. However, an addendum may be written to the note.
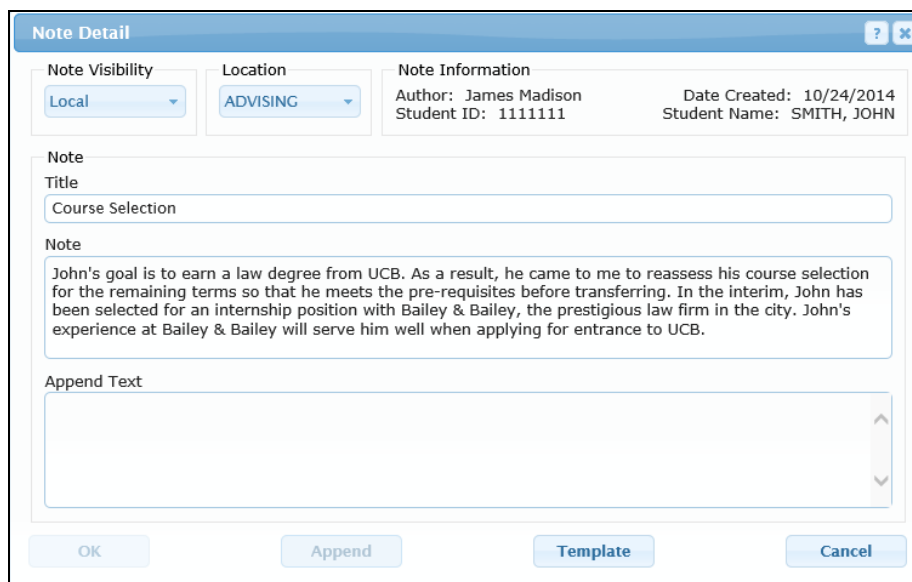
16.4   Append a Note

1. To append a note to an existing note, double click on the note to be appended from the *Notepad*. The *Note Detail* screen will be displayed.

Note
Only the author of the note may append to it.

---

2. Click **Append** to display an <u>Append Text</u> panel. Here is an example:

3. Click in the <u>Append Text</u> panel and type the appended note.

4. Click **OK**. The note will be appended to the original note. Here is an example of the Notepad showing an appended Note:

Note
If Templates are available for use when appending a note, a Templates button will be displayed. See Section 16.6 and 16.7 below.

16.5   Delete a Note

Generally, only the author of a note may delete that note, if the applicable permission is granted to do so. However, managers who have the access right to "Delete Any Notes" may delete notes written by any author.

After gaining access to the *Notepad* for the selected student,

1.   Click on the selected note.

2.   Click **Delete**. A confirmation message will be displayed.

3.   Click **OK**.

4.   When done, exit the Notepad.

Note
eAdvising question occurrences that are listed on the Notepad may also be deleted.

16.6   Use a Pre-Defined Template

If the system administrator has created pre-defined note templates, they may be used in lieu of writing an entire note from scratch.   If such templates exist, a Template button will be displayed on the *Note Detail* screen for a selected student after clicking Add or Append.

After gaining access to the *Notepad* for the selected student,

1.   Click **Add** to display the *Note Detail* screen.

2. Click **Template** to display a sub-menu. One of the options will be **Pre-defined**. Here is an example:
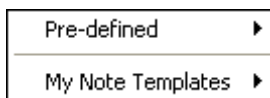
3. Click **Pre-defined ▶** to display list of standardized templates created for use department wide.

4. Click on the desired template to display the *Note Template*. The pre-defined wording will be placed in the note

5. Proceed to complete or edit the note.

6. Click **OK**.
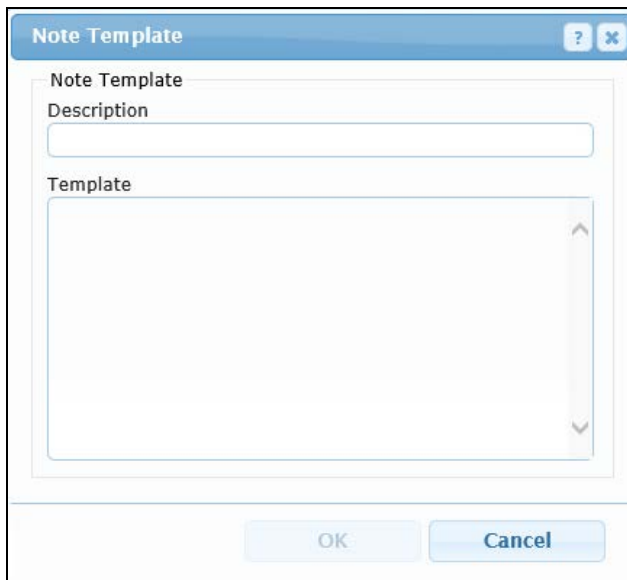
16.7   Create and Use Your Own Template

If the system administrator has selected the option to Allow User Templates, users may create their own templates. If this setting has been established, a My Templates button will be displayed on the Notepad.

1. From the *Notepad*, click **My Templates**. A *Notepad Templates* screen will be displayed listing any existing templates. Here is an example:
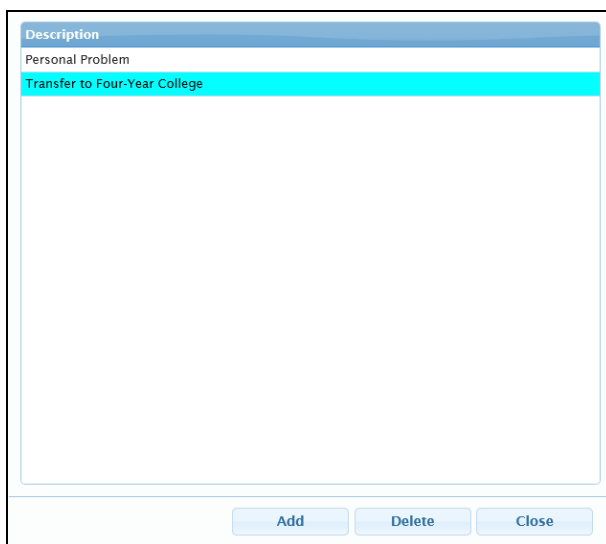
2. Click **Add**. The following blank *Note Template* screen will be displayed.

3. Click in the **Description** field and type in the desired description. This description label will be displayed on the My Note Templates list.

4. Click in the **Template** field and type in the text of the template. The field will hold 65,000 characters, or the equivalent of five pages.

5. Click **OK**.

6. Repeat steps 2 – 5 to create other templates.

7. To use one of your own templates after gaining access to the *Notepad* for the selected student,

    a. From the Notepad, click **Add** to display the *Note Detail* screen.

    b. Click **Template** to display a sub-menu.

    c. Click **My Note Templates** ▶ to display a list of your templates.

    d. Click on the desired template to display the *Note Template*. The pre-defined wording will be placed in the note.

    e. Proceed to complete or edit the note.

    f. Click **OK**.

SECTION 17   eADVISING
[under development]

SECTION 18   THE WAITING LIST

18.0   Overview

If the Use Public Viewer option has been selected and set up to display a waiting list in public areas, advisors may have the option to change the waiting status of a student who has a booked appointment or has checked in for a drop-in visit that the student may proceed to the advisor's room. When the advisor initiates this action, the student's name will flash on the waiting list and/or the student will receive a text message, if that student has a text phone entered in the system and text is activated as a contact method. The text option enables students to be away from the waiting room and still receive notification when it is time to be seen.

18.1   Change Waiting Status for Booked Appointments

To notify a student with a booked appointment to proceed to the advisor's office,

1.   From MY GRID, click on the time slot containing the student's booked appointment.

2.   Click **Quick Links ▼** and select **Waiting Status** to display the following *Waiting Status* screen.

Waiting Status	
Option - Status	**Description**
Default	Used to leave the student's name on the Public Viewer waiting list.
Notify	Use to initiate the flashing of the student's name on the Public Viewer waiting list indicating that the advisor is ready to see the student.
Remove	Use to remove the student's name from the Public Viewer waiting list when the appointment or drop-in visit is over.

3.   Click **Notify**.

4.   Click **OK** to flash the student's name on the waiting list.

To remove a student from the Waiting List on the Pubic Viewer after the student has arrived,

1.   From MY GRID, click on the time slot containing the student's booked appointment.

2.   Click **Quick Links ▼** and select **Waiting Status** to display the *Waiting Status* screen again.

3. Click **Remove**.

4. Click **OK**. The student's name will be removed from the waiting list on the Public Viewer.

18.2   Change Waiting Status for Drop-in Visits

To notify a student registered for a drop-in visit to proceed to the advisor's office,

1. From the Drop-in List in the Student Waiting Mode, click on the line containing the student's name.

2. Click **Quick Links ▼** and select **Waiting Status** to display the following *Waiting Status* screen.

Waiting Status	
Option - Status	**Description**
Default	Used to leave the student's name on the Public Viewer waiting list.
Notify	Use to initiate the flashing of the student's name on the Public Viewer waiting list indicating that the advisor is ready to see the student.

3. Click **Notify**.

4. Click **OK** to flash the student's name on the waiting list. This action also will remove the student from the *Student's Waiting* screen on the Drop-in List.

SECTION 19   STUDENT MAINTENANCE

19.0   Overview

Typically, students' identifying information (such as ID, name, birth date, telephone numbers, and e-mail and mailing address) is imported from the college's host system to the SARS database so that the student information is available when making the initial appointment. If the student information does not already exist, the information (other than the student's mailing address) will be stored in the SARS database when the initial appointment is scheduled.

If it is necessary to add a student in advance of importing the data or making an initial appointment, the Student Maintenance screen may be used to enter the student identifying information manually.

Here is an example of the screen when it is expanded to display the address fields.

Student Maintenance		
Option		**Description**
Enter ID or Name to find a student	Student ID	Use to display or enter the student's identifier.
	Name	Use to display or enter the student's name.
	Search	Use to search for a Student ID by using the Student Name.
	Clear	Use to clear the screen for another entry in ID or Name.
Student Information	Birth Date	Use to display or enter the student's date of birth.
	Home Phone	Use to display or enter the student's permanent telephone number.
	Extension	Use to display or enter the extension to the permanent telephone number.
	Contact Phone	Use to display or enter the student's preferred contact telephone number, if different from the Home Phone. The system will use the number in this field, if it is populated.
	Extension	Use to display or enter the extension to the contact telephone number.
	PIN #	Use to display or enter an optional PIN number to be used by the student to log into the appointment web interface instead of requiring a birth date.
	Text Phone	Use to display or enter the student's cell phone number if it has text messaging capabilities.
Address Information	Address 1	Use to display or enter the first line of a student's street address.
	Address 2	Use to display or enter the second line of a student's street address (e.g., apartment number).
	City	Use to display or enter the city of the student's address.
	State	Use to display or enter the state of the student's address. Up to 20 characters are available to accommodate international addresses.
	Zip Code	Use to display or enter the zip code of the student's address.
	E-Mail:	Use to display or record the student's primary email address. This is the email address that is stored in the college's database.
	E-Mail 2	Use to display or record the student's alternate email address, if allowed. If Email 2 is present, then it is the email address used by the system.
Opt In Settings		Use to select the acceptable method(s) for contacting the student. Any combination, or all, may be selected.
	Email	Use to specify that the student may be contacted via e-mail. This option is <u>required</u> if SARS·MSGS will be used to send email messages for appointment reminders or other notices.

Student Maintenance		
Option		**Description**
	Phone	Use to select the option to call the student by telephone. This option is required if SARS·CALL will be used to make automated telephone calls for appointment reminders or other messages.
	Text	Use to specify that the student may be contacted via text messaging. This option is required for students to receive text receipts of appointment confirmations or other notices.
Language Preference		Use to display or select the primary language of the student for use with SARS·TRAK.
Additional Info		Use to access the *Additional Information* screen.
Short Name Assignments		Use to access a screen on which the student may be assigned to a specific advisor.
Merge ID's		Use to merge appointment history for a student who has been assigned more than one identifier, or to merge appointment history while keeping two valid ID's for a student.
Student History		Use to access the *Student History* screen.
Add		Use to make fields available to enter new data.
OK		Use to save entries and exit the screen.
Cancel		Use to exit the screen without saving.
Delete		Use to remove a student from the system. This option is available only if the student has no appointment history, no alerts, no notes, and no drop-ins in the system.

19.1   Methods for Gaining Access to Student Maintenance

1. Log in to SARS Anywhere.

2. Click the **Student Maintenance Tab**, if it has been configured for easy access,

    -or-

    Click **Quick Links ▼** and select **Student Maintenance**.

3. Select one of the options below to enter the student's identifier.

    a. Type the student's identifier in **Student ID** (e.g., Student ID, Banner ID, Colleague ID, PeopleSoft ID).

        Note
        If the student's ID format is different from that provided in the ID field, click the **Student ID** label to display a menu of available ID formats and select the desired format (e.g., a pre-assigned Guest ID). Then type the student's identifier.

b. If the student's identifier is not known, type the student's name or a portion thereof in **Name** and click **Search**. If matches are not found in the database, a notification message will be displayed. If only one match is found in the SARS database, the student's identifying information will be displayed. If more than one match is found, a list of all students with that name will appear on a *Search Results* screen. From the *Search Results* screen,

    i) Click the selected name.

    ii) Click **OK**.

c. If the individual does not have an identifier,

    i) Click the <u>pencil</u> icon ✎ to automatically change the ID field to the Guest ID format and to generate a temporary identifier with **SG** as the leading characters. The action will enable the <u>Student Name</u> field.

    ii) Click the **First Name** field and type in the individual's first name.

    iii) Repeat for the individual's middle name, last name, and suffix and preferred name, if any, in the relevant fields.

19.2   Add a New Student

Typically, students' identifying information (such as ID, name, birth date, telephone numbers, and e-mail and mailing address) is imported from the college's host system to the SARS database so that the student information is available when making the initial appointment. If the student information does not already exist, the information (other than the student's mailing address) will be stored in the SARS database when the initial appointment is scheduled.

If it is necessary to add a student in advance of importing the data or making an initial appointment, the *Student Maintenance* screen may be used to enter the student identifying information manually.

1. From the *Student Maintenance* screen, click **Add**.

2. Click the **Student Information** field and enter the student's Birthdate, Home Phone (and extension), and Contact Phone number (and extension), PIN # (if desired), and Text Phone number (if available).

3. Click the icon adjacent to **Address Information** to expand the screen and then enter the student's street address, city, state, zip code, and e-mail address(es).

> **Note**
> The State field allows up to 20 characters to accommodate international addresses.

4. In the <u>Opt In Settings</u> panel, click **Email, Phone,** and/or **Text** to specify the acceptable methods of contacting the student.   Any combination, or none, may be selected.

> **Note**
> Call is required if the college will be using SARS·CALL to send out appointment confirmations or notices. Email is required if the college will be using SARS·MSGS to send email messages to students. Text will be available to send text messages to students, if the college has a license for that option.

5. Click **Language Preference ▼** and then select the student's primary language. This option is used in conjunction with SARS·TRAK.

6. If the Additional Info button is enabled, you may click **Additional Info** to display the list of questions to be used for providing more detailed information about the student. If the user has been given permission to record a response to one or more questions, enter a date, list, text, or yes/no response as appropriate. Then click **Save**. (Also see "Additional Information" at Section 9.)

7. To assign the student to a specific advisor, click **Short Name Assignments** to display a *Short Name Assignments* screen. Here is an example:

a. Click the checkbox in the Location panel applicable to this student.

b. Click on the space in the Short Name column to display a drop-down list of advisors. Select the individual name to which the student is assigned.

c. Click **Save**.

8. When done, exit the screen.

19.3 Modify Data about a Student, Including Changing an Identifier

After gaining access to the *Student Maintenance* screen for the selected student,

1. Correct any incorrect information, as needed. Then click **Save**.

Note
Information changed using the *Student Maintenance* screen will be reflected on all appointments and drop-ins.

2. When done, exit the screen.

19.4 Merge Student Identifiers and Associated Student History

If a student has multiple IDs in the database that are not linked together, merge the appointment histories and/or student identifiers.

A student may have two or more names or identifiers in the database for various reasons, such as:

• If a scheduler incorrectly entered the ID and name when making an appointment or adding the student to the drop-in list.

- If the student was initially assigned a temporary ID and subsequently had a college ID entered into the database.

- If a scheduler entered another, but also valid, ID for a student (e.g. a Student ID and a Banner ID).

- If the data came from a host computer into SARS Anywhere and the student's separate ID's are not joined together.
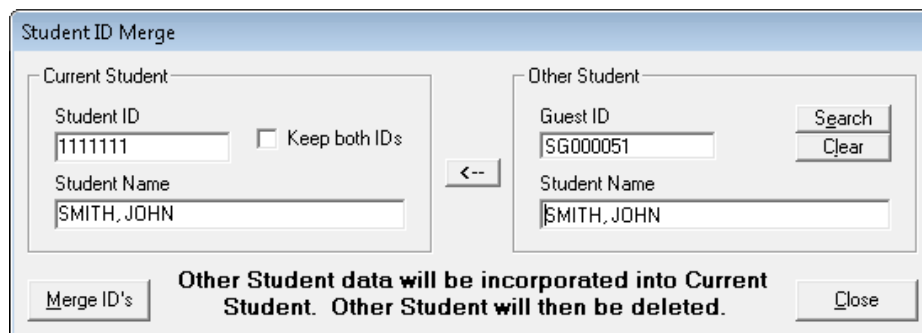
In such cases, appointment history for a student may be stored separately under the IDs that were used when the scheduling action took place. Two options are available for correcting this problem. They are:

- Merge ID's and eliminate the invalid name or ID. This will store all student history and activity under a single, valid ID.

- Merge ID's but keep both ID's. This will merge all existing appointment history for a single student having two IDs without eliminating the other valid ID. All student history and activity will be accessible under either of the IDs.

To facilitate identification of a student who has two or more IDs, generate the "Duplicate ID Report." (See "Duplicate ID Report" in the SARS Anywhere Reports Manual at Section 1.7.)

After gaining access to the *Student Maintenance* screen for the selected student,

1. Click **Merge ID's** to display the *Student ID Merge* screen. Here is an example:

2. In the fields in the Current Student panel, the Student ID and Student Name that you just entered on the *Student Maintenance* screen will be displayed. Note that a **Keep both IDs** checkbox is displayed.

3. In the Other Student panel, click the **ID** field and type the other ID that is associated with the student. Upon typing the last digit of the identifier, the name associated with that ID will be displayed in the Student Name field.

   Note
   If the student's ID format is different from that provided in the Other Student panel, click the **Student ID** label to display a menu of available ID formats and select the desired format (e.g., a pre-assigned Guest ID). Then type the student's identifier.

4. To transfer all appointment activity and student data from the Other Student ID to the Current Student ID and to delete the Other Student identifier, leave the **Keep both IDs** option unchecked and ensure that the arrow is pointing toward the Current Student panel (←). If the arrow is not pointing to the left, click on the arrow button. This action will toggle it to point to the left-hand side.

-or-

To transfer all appointment activity and student data from the Current Student ID to the Other Student ID <u>and to delete the Current Student identifier</u>, leave the **Keep both IDs** option <u>unchecked</u> and ensure that the arrow is pointing toward the <u>Other Student</u> panel (→). If the arrow is not pointing to the right, click on the arrow button. This action will toggle it to point to the right-hand side.
-or-

To merge all appointment activity and student data under both identifiers <u>leaving both ID's intact</u>, click the **Keep both IDs** checkbox. It does not matter which way the arrow is pointing.

5. Click **Merge ID's**. A confirmation message will be displayed.

6. Click **Yes**.

The appointment histories will be merged, the invalid name and ID will be eliminated (if applicable), and you will be returned to the Student Maintenance screen.

19.5   Delete a Student

A student may be deleted <u>only</u> if no appointment history, including drop-in visits, exists for that student.

1. From the *Student Maintenance* screen, click the selected name.

2. Click **Delete**. A confirmation message will be displayed.

3. Click **Yes** to confirm the deletion.

4. When done, exit the screen.

19.6   Assign Students to a Special Population Group

Some departments may deal with special population groups, such as TRIO. The *Student Maintenance* screen is useful for assigning all the students to the special population group one at a time if the information cannot be imported from some external source. The Additional Information option on the *Student Maintenance* screen is used for this purpose. Additional Information that is manually entered must be manually maintained.

1. From the *Student Maintenance* screen, enter the ID of the selected student in the ID field.

2. Click **Additional Information**.

3. Navigate to the relevant Special Population group category and click to change the answer to **Yes**.

4. Click **Save**.

5. Click **Clear** to make the student information fields available for another entry.

6. Repeat steps 1 – 5 for other entries.

7. When done, click **Close**.

SARS ANYWHERE USER MANUAL

APPENDICES

APPENDIX A — HELP FILE

Note

In order to view the Help File, your pop-up blocker must be disabled for the SARS Anywhere website. For instructions on disabling your pop-up blocker, see your web browser help file.

The Help feature is a convenient and quick way to obtain more information about SARS Anywhere topics. There are four ways to use the Help feature: Contents, Index, Search, and Glossary.

1. To access the Help file from SARS Anywhere, click the **Help** icon from the toolbar.

All > ADVISING > Monday, January 05, 2015   Quick Links

►**Contents**

2. Click the **Contents** tab to display books representing a table of contents.

3. Click on the book containing the topic of your choice. Other books may appear.

4. Continue to click on the desired book(s) until a list of topics is displayed.

5. Click on the desired topic to display the information in the right-hand pane.

6. Click the **X** at the upper right of the screen to exit.

►**Index**

2. Click the **Index** tab to display an alphabetized comprehensive list of topics.

3. Scroll to find the topic or type the first few letters of the topic for which you are seeking information.

4. Click on the selected topic.

5. Click the **X** at the upper right of the screen to exit.

►**Search**

1. Click the **Search** tab.

2. Type the word for which you are seeking information.

3. Click **Go**. A list of all topics containing that word will be displayed.

4. Click on the selected topic.

5.   Click the **X** in the upper right-hand corner to exit.

▶**Glossary**

1.   Click the **Glossary** tab.

2.   Click the desired word to display its definition in the lower-pane.

3.   Click the **X** in the upper right-hand corner to exit.

APPENDIX B — DATE PICKER

To select a date or date range in SARS Anywhere,

1. Click on the Flyout menu to display a calendar selection screen.

    Here is an example for a single advisor using MY GRID.

    Here is an example for a single advisor from THE GRID for the purpose of viewing multiple dates.

Here is an example for a user with access to view the schedules for multiple advisors.

2. If Today is showing, click **Today** to go to "today". THE GRID, MY GRID and the Drop-in Screen will display today's date.

3. To navigate to <u>any other date</u> that is displayed on the calendar, click on that date to insert it.

4. To navigate to the <u>previous month</u>, click the Left Arrow ◄ and click on the desired date.

5. To navigate to the <u>next month</u>, click the Right Arrow ► and click on the desired date.

6. To find a date for a selected month and/or year,

    a. Click **Year** ▼ to display a list of years, and select the desired year.

    b. Click **Month** ▼ to display a list of the months of the year, and select the desired month.

    c. Then click the desired date.

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