Login and Preferences

Set Default Preferences

1. Click Calendar or Student Console on the top navigation bar
2. Click the cog wheel icon to open the Administration Panel
3. User Preferences panel will be displayed with three tabs: General Defaults, Calendar View Defaults, New Meeting Defaults

User Specialty
Displayed under the user’s picture on the Student Success Team and in other areas of Buff Portal Advising. It is also a useful place to add an out-of-office message.

Default Student Search Mode
This allows you to choose the type of search displayed in the Console’s fly out panel. Normal is selected by default. Advanced Search takes up more real estate in the fly out panel, so it is not recommended as the default unless used frequently.
Login and Preferences

Default Show Weekends
This will display Saturday and Sunday when viewing the calendar.

Make Declined Appointments Re-reservable
If a student declines (or cancels) their appointment, this makes it possible for another student to reserve it (typically checked for most staff).

Publish MS Exchange to Custom Calendar
Imports busy/free time from the Colorado.edu exchange calendar to the Buff Portal Advising calendar. No details are displayed. This helps prevent double booking.

Default Show MS Exchange Time
This will display the free/busy times from the Colorado.edu calendar by default. It can be adjusted on the MyCUHub calendar on an as needed basis as well.

Publish Custom Calendar to MS Exchange
Exports all appointments as busy time to the Colorado.edu exchange calendar. No details are displayed.

Make Custom Calendar Visible?
No one, including students, will be able to view the Buff Portal Advising calendar until this box is checked.

Working Hours Start/End
Change the hours available to make appointments on your calendar.
Default Attendee Meeting Format
Set what meeting type will automatically populate. Options include In Person, Phone, Email, Zoom, Chat.

Default Location
Automatically populates for any new meeting created.

Default Meeting Description
Visible to students when reserving the appointment and will automatically populate for any new meeting create.

Prep Time
Appointments will no longer be visible to students if they are within the prep time window (e.g. Once within 12 hours of the meeting, it will not show as available to book).

Buffer (min.)
Amount of time the system will automatically create between meetings (for entering logs, etc.).

Default Length
Time allotted for different types of meetings. Note: this will likely vary based on the meeting type (e.g. Individual and Walk-In Appointments will likely take less time than Group Meetings).

Visibility Range
Allows you to set limits on how long recurring appointments are available to students.
Student Information

Search for student

1. Click the Fly out icon to open the panel.
2. In the search field, enter the student name or student ID, then select the student from the menu that appears.
3. Select the name of the correct student. You will be presented with basic student information in the sidebar, as well as academic information from the student’s perspective in the Student Console.

Student Console Overview

1. Student Name and Photo
2. Student Success Team: Click on a picture to see that Advisor’s calendar of appointments.
3. Decision Tree: Provides options to help students find the appropriate information and person to match their request.
4. Undergraduate Performance: Graphs GPA over time and lists cumulative hours passed.
   *Note: hours may be different than on degree audit due to College, Department or School policies.
5. Term by Term: Provides a term based view of course, GPA, and credit hours, as well as any academic standing codes.
   *Note: Clicking on a term will open or collapse that term.
6. Actions & Alerts: Lists any holds or alerts on the student’s account.
7. Upcoming Meetings: Shows upcoming meetings scheduled, as well as a historical record of previous interactions.
8. Links: Lists links frequently utilized by students.
9. Academic Major/Minor/Subplan: List of academic programs on the student’s record.
10. Placement Test Results: Shows any placement test results available, such as math or writing placement.
Fly-out Panel

Search
Users can search using first name, last name, SID, email, or phone number. In the flyout panel, you can switch between standard and advanced search as needed, and you can change the default in User Preferences to your preferred method.

My Active Meetings
This section of the fly-out will automatically populate with the appropriate student that is scheduled for a meeting at that time. It is a best practice to click Start Meeting for each session to indicate that the student has attended a meeting. It is easy to begin a drop-in session with any student by pulling up their console, then clicking Start Drop-in Meeting.

Student Contact Information
Includes address, phone, SID, and Contact History (logs and messages) link. From this window, there are also links to send a message and to log a note on the student’s record. Please note that logging from here will not link the log to a meeting or remove it from the To-Do List.

My Meetings
Provides a view of scheduled meetings that day, as well as Upcoming Meetings and the To-Do List. A view of Upcoming Meetings and the To-Do List can be accessed by selecting the drop-down menu to the right of Today’s Meetings.

Links
Provides direct deep links to a specific student’s information in each of the source systems listed.

Student Groups
This section lists any groups the student is affiliated with.

Placement Test Results
Provides the results of any placement tests the student has taken.

Best Practice:
Use the drop-down arrows to expand or hide sections in the Fly-out panel.
Contact History

**Individual Contact History**
Includes meeting notes, direct messages, alerts and outreach.

**Mass Contact History**
Includes any mass messages that were sent to the student.

**Table View**
Lists items in a table for quick scanning.

**Reading View**
Expands all sections so the content can be viewed.

**Search Field**
Filter and search by key word(s)

**Search Filters**
- Date
- Business Unit
- Created By
- Record Type
- Type
- Topics
Reserving Appointments for a student

Permission to add students to other calendars

An updated permission allows all Student Success Staff in Buff Portal Advising to add a student to an available meeting on anyone’s calendar, even if the criterion would otherwise exclude the student. This change allows users with appropriate permission to add any student (active or inactive) to any available meeting.

The Search All check box includes all students. This feature is not automatically included on all searches because it can impact system performance. If a student is included in the criterion of the meeting being scheduled, the Search All feature does not need to be used.

Using Search All

1. Check the Search All box and enter at least 3 characters of the student’s name or their student ID. Select the correct student when they appear in the search results.
2. Utilize the desired outcome field and add information about the meeting, as well as your first name, last initial (e.g. “scheduled by James M.”) so that any follow-up outreach can be made accurately.

Please Note: The campus policy is to not add a student to someone’s calendar without a 24-hour lead time. If the student circumstances are more pressing than 24-hours, please contact the advisor/student success staff member directly to set something up.