MyCUHub

Advisor User Guide

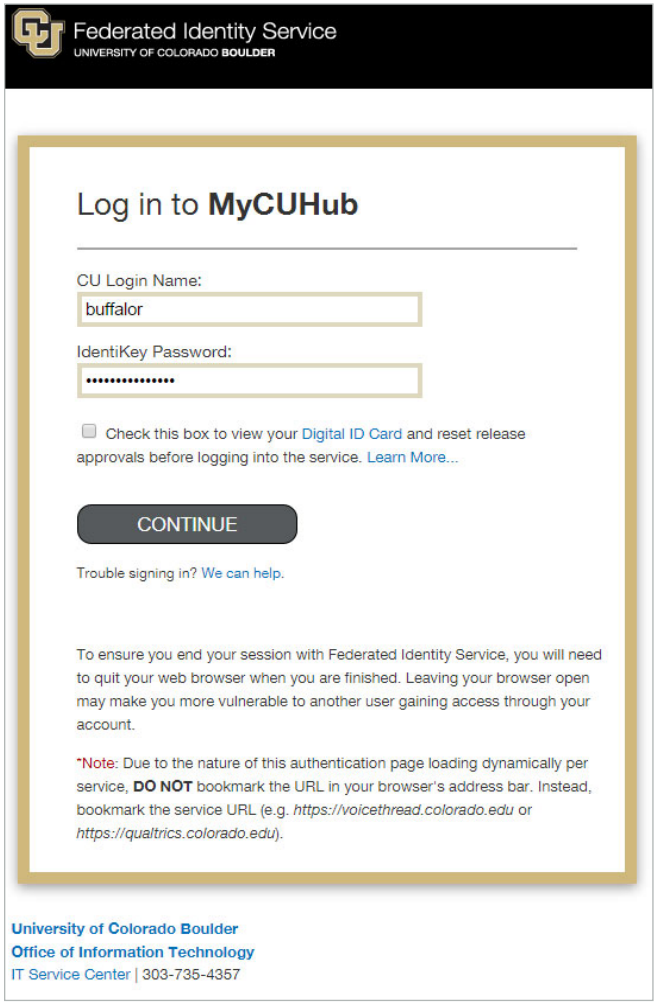
University of Colorado
Boulder

Login and Preferences

https://mycuhub.colorado.edu

CULoginName (also known as IdentiKey Username)

IdentiKey Password



MyCUHub login page

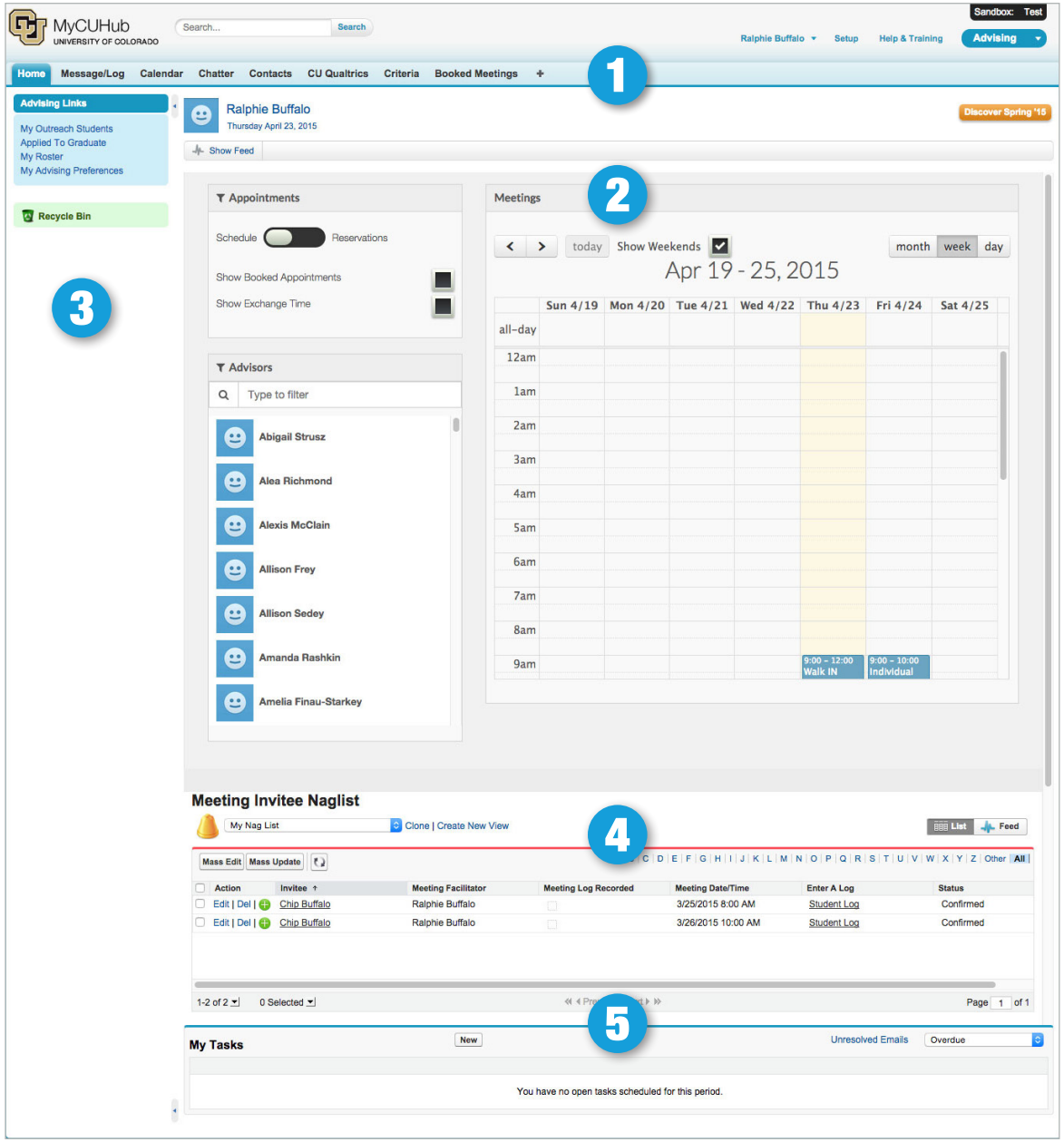
Adjust My Advising Preferences

1. Click **Home**, located on the top navigation bar.
2. In the left-side menu, click **My Advising Preferences**.
   - If you do not see the left-side menu click the arrow icon located on the far left of your screen to expand the menu.
3. In the ***Set Advisor Preferences*** section you can set meeting preparation time and meeting buffer time for:
   - **Individual Appointments**
   - **Group Meetings**
   - **Open Hours**
   - **Walk-in meetings**
4. Once you have set your preferences, click the **Next** button.
5. Your preferences will be saved and you can click the **Finish** button to return to the Home page.

Adjust Personal Information

1. Located in the page header, click on the ***drop-down menu associated with your name***.
2. Select **My Settings**.
3. In the left-side menu click **Personal**, then click **Personal Information**.
4. On the ***Personal Information*** page, some of the information you can adjust includes:
   - **Details**: E-mail, Alias, Phone, Extension and more
   - **Address**: Street, City, State, Zip Code, and Country
   - **Work Information**: Title, Department, Start/End of Day and more.

MyCUHub Home - User Interface



1 Navigation Bar

The navigation bar contains links to the many different tools of MyCUHub. New tools can be added by using the plus icon (+).

2 Calendar

The Calendar tool lets you view your current meetings, as well as schedule meetings and appointments.

3 Left-Side Menu

The Left side menu contains Advising Links, such as My Roster and My Advising Preferences.

4 Naglist

Your Naglist is a list of tasks related to meetings with students. Tasks include changing student meeting status (i.e. attended, no show), meeting logs, and other notes.

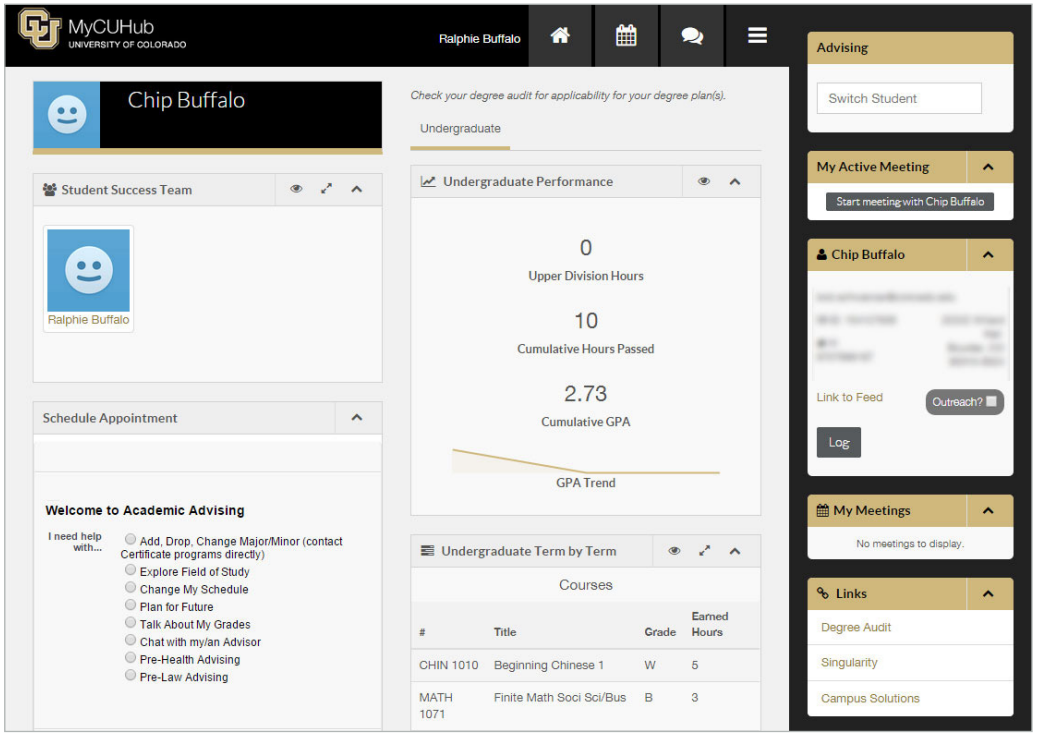
5 My Tasks

The My Tasks tool is used to create to-do lists for yourself.

Search Student Information

Search for student

1. Click **Calendar**, located in the top navigation bar. You will be directed to a new page.
2. Click the **advising menu button** (three horizontal lines), and a side menu will open.
3. In the text field located in the ***Advising*** section, enter the **student name** or **student ID**, then select the student from the menu that appears.
4. You will be presented with basic student information in the sidebar, as well as academic information from the student's perspective in the main content area.



MyCUHub student search screen with related student academic information

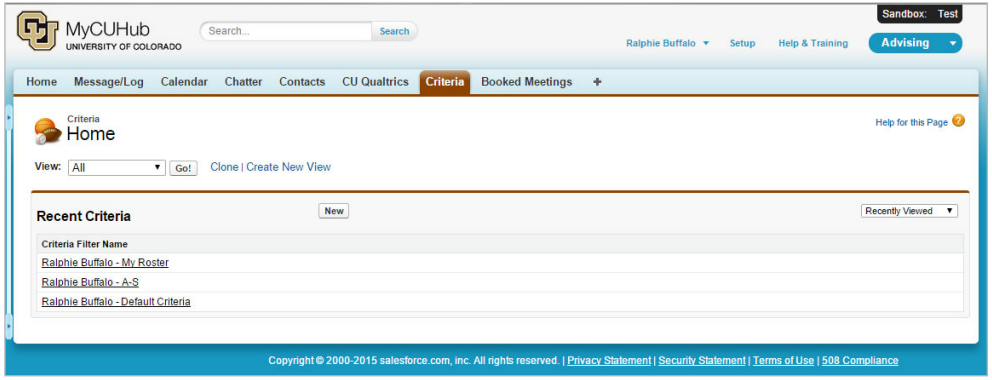
Review detailed student information

1. Click the **Search** bar, located in next to the MyCUHub logo in the header.
2. Enter the **student name** or **student ID**, then select the student from the menu that appears.
3. You will be presented with the student's information, including:
   - **Student activity**
   - **Contact details**
   - **Student Group affiliations**
   - **Academic details**

Criteria

Criteria Overview

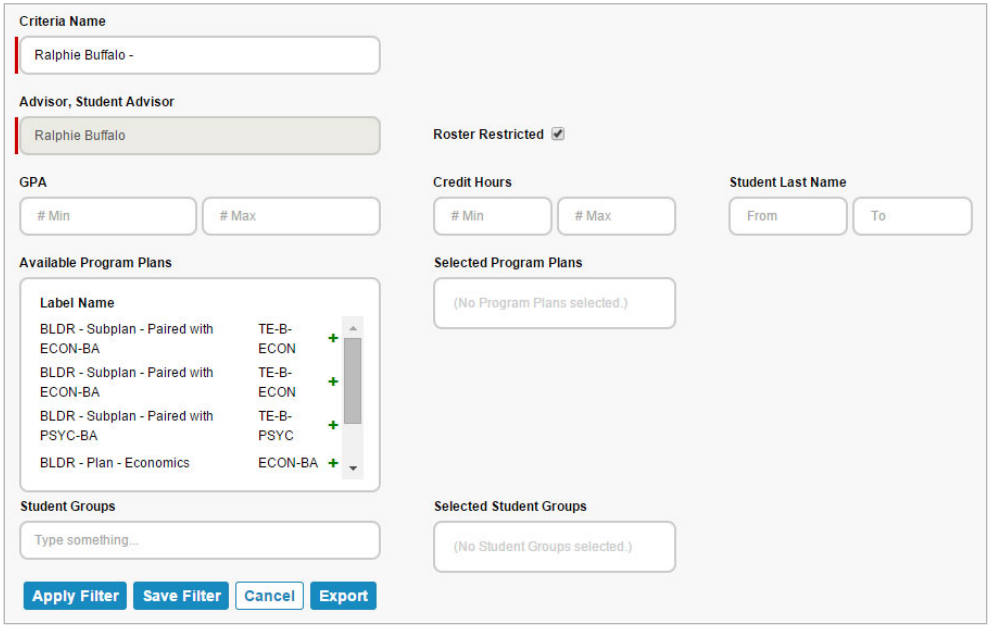
Criteria are used to limit results when scheduling students for meetings and viewing student information. Click on Criteria in the navigation bar to view criteria and the create new filters (refer to the ***Create New Criteria*** instructions below). By default the selected criteria will be all of the students you advise.



Criteria List screen, displaying recently used criteria

Create New Criteria

1. Click **Criteria**, located in the top navigation bar.
2. In the ***Recent Criteria*** section, click the **New** button.
3. Enter a name for your criteria in the **Criteria Name** field.
   - Criteria Names should be formatted as:
     Advisor Name - High Level Criteria Description
4. Choose additional filter parameters, which include:
   - **GPA**
   - **Credit Hours**
   - **Student Last Name**
   - **Program Plans**
   - **Student Groups**
5. When finished selecting filters, click the **Apply Filter** button.
6. If satisfied with the filtered results, click the **Save Filter** button.



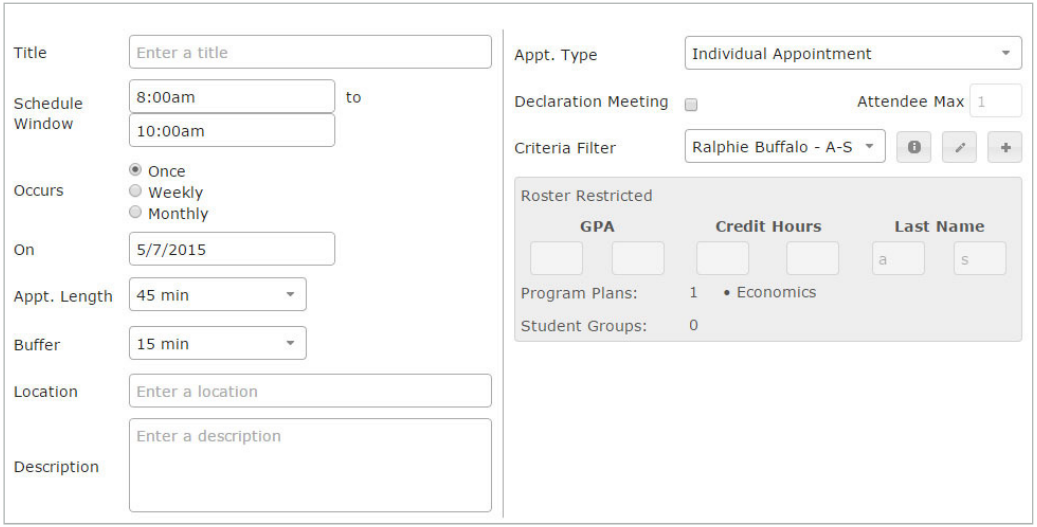
New Criteria creation screen.

Scheduling Appointments

Schedule Individual Appointments

Individual Appointments are one on one meetings that students will be able to select, based on the times you set.

1. Click on either the **Home** or **Calendar** link in the navigation bar.
2. Navigate to the date that you would like to schedule an appointment.
3. Click an drag on the calendar for the time slot you wish to schedule the appointment.
   - You can change time slots once the new window opens as well.
4. In the new window, enter a **Title** for your meeting in the corresponding field.
5. Choose the frequency of the meeting, **Once**, **Weekly**, **Monthly**.
   - If you choose **Weekly** or **Monthly**, additional date options will become available.
6. Customize the **Appt. Length** and **Buffer** fields, if desired.
7. Enter a **Location** for the meeting in the corresponding field.
8. Enter an appointment **Description** in the corresponding field, if desired.
9. If not already selected, choose **Individual Appointment** from the ***Appt. Type*** drop-down menu.
10. Choose the **Criteria Filter** you wish to use.
    - A new criteria can be created, by clicking the **plus button (+)**.
    - You can view the list of the students within your chosen criteria by clicking the **information button** next to the Criteria filter drop-down menu.
11. Click **Save** and the time slot(s) will be available for students to select.



Appointment or meeting creation form

Scheduling Appointments

Schedule Quick Booking Meeting

A Quick Booking meeting allows for you to sent meeting invitations to specific students.

1. Click on either the **Home** or **Calendar** link in the navigation bar.
2. Navigate to the date that you would like to schedule an appointment.
3. Click an drag on the calendar for the time slot you wish to schedule the appointment.
   - You can change time slots once the new window opens as well.
4. In the new window, enter a **Title** for your meeting in the corresponding field.
5. Customize the **Appt. Length** and **Buffer** fields, if desired.
6. Enter a **Location** for the meeting in the corresponding field.
7. Enter an appointment **Description** in the corresponding field, if desired.
8. Choose **Quick Booking** from the ***Appt. Type*** drop-down menu.
9. Choose the **Criteria Filter** you wish to use.
   - A new criteria can be created, by clicking the **plus button (+)**.
   - You can view the list of the students within your chosen criteria by clicking the **information button** next to the Criteria filter drop-down menu.
10. Enter the **student name** or **student ID** in the ***Book appt. for*** field, then select the student from the menu that appears.
    - You can adjust the student's meeting status once they are selected.
11. Click **Save** and the meeting will be made.

Schedule Group Meeting

Group Meetings are meetings that students will be able to select, based on the times and number of students you set.

1. Click on either the **Home** or **Calendar** link in the navigation bar.
2. Navigate to the date that you would like to schedule an appointment.
3. Click an drag on the calendar for the time slot you wish to schedule the appointment.
   - You can change time slots once the new window opens as well.
4. In the new window, enter a **Title** for your meeting in the corresponding field.
5. Choose the frequency of the meeting, **Once**, **Weekly**, **Monthly**.
   - If you choose **Weekly** or **Monthly**, additional date options will become available.
6. Customize the **Appt. Length** and **Buffer** fields, if desired.
7. Enter a **Location** for the meeting in the corresponding field.
8. Enter an appointment **Description** in the corresponding field, if desired.
9. Choose **Group Meeting** from the ***Appt. Type*** drop-down menu.
10. In the **Attendee Max** field, enter the maximum number of students who can select the time slot.
11. Choose the **Criteria Filter** you wish to use.
    - A new criteria can be created, by clicking the **plus button (+)**.
    - You can view the list of the students within your chosen criteria by clicking the **information button** next to the Criteria filter drop-down menu.
12. Click **Save** and the time slot(s) will be available for students to select.

Scheduling Appointments

Schedule Walk-In or Open Hours

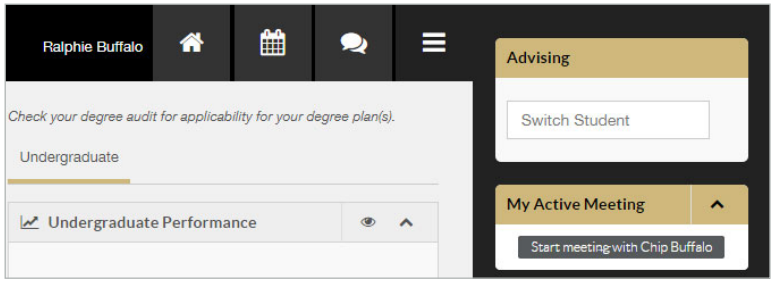
Walk-In or Open Hours meetings are for student reference, but can not be reserved by the student.

1. Click on either the **Home** or **Calendar** link in the navigation bar.
2. Navigate to the date that you would like to schedule an appointment.
3. Click an drag on the calendar for the time slot you wish to schedule the appointment.
   - You can change time slots once the new window opens as well.
4. In the new window, enter a **Title** for your meeting in the corresponding field.
5. Customize the **Appt. Length** and **Buffer** fields, if desired.
6. Enter a **Location** for the meeting in the corresponding field.
7. Enter an appointment **Description** in the corresponding field, if desired.
8. Choose either **Walk-In** or **Open Hours** from the ***Appt. Type*** drop-down menu.
9. Choose the **Criteria Filter** you wish to use.
   - A new criteria can be created, by clicking the **plus button (+)**.
   - You can view the list of the students within your chosen criteria by clicking the **information button** next to the Criteria filter drop-down menu.
10. Click **Save** and the time slot(s) will be available for students to reference.

Start On Demand Meeting

An on demand meeting should be used if you have an impromptu meeting with a student.

1. Click **Calendar**, located in the top navigation bar.You will be taken to a new page.
2. Click the **advising menu button** (three horizontal lines), and a side menu will open.
3. In the text field located in the ***Advising*** section, enter the **student name** or **student ID**, then select the student from the menu that appears.
4. In the ***My Active Meeting*** section, click the Start Meeting with Student Name button.
5. A green Started indicator will appear. Once the meeting is completed, click the Finish button.
6. You will be directed to the New Log page, with student and meeting type completed.
7. Enter your notes in the Message Content field, then click the Post Log button.
   - You can choose to make the Log part of a Secured Feed and attach an associated file.
8. A Success message will appear at the top of the New Log area.



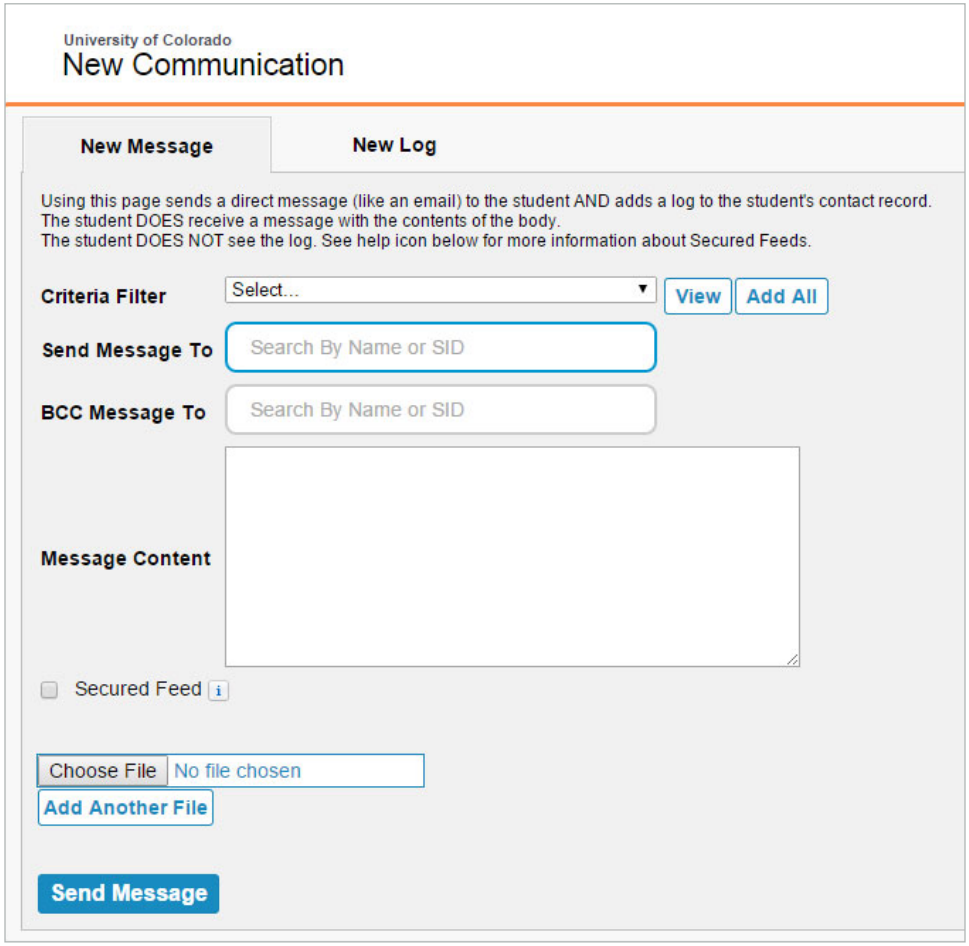
Start an impromptu meeting timer, located on the right sidebar

Create and Send Messages

Create New Message

You should use the New Message functionality to send direct messages to student(s).

1. Click **Message/Log**, located on the top navigational bar.
2. If not chosen, click the **New Message** tab.
3. Choose your **Criteria Filter**.
   - Your chosen criteria will effect the available students to send messages to.
4. In the **Send Message To** field, enter the **student name** or **student ID**, then select the student from the menu that appears.
   - Repeat this process if you wish to add additional Students.
5. If you wish to have a user informed of the message but hidden from the student(s), use the **BCC Message to** field. Enter their name, then select the name from the menu that appears.
6. Enter your notes in the ***Message Content*** field, then click the **Send Message** button.
   - You can choose to make the Log part of a Secured Feed and attach an associated file.
7. A **Success** message will appear at the top of the ***New Message*** area.



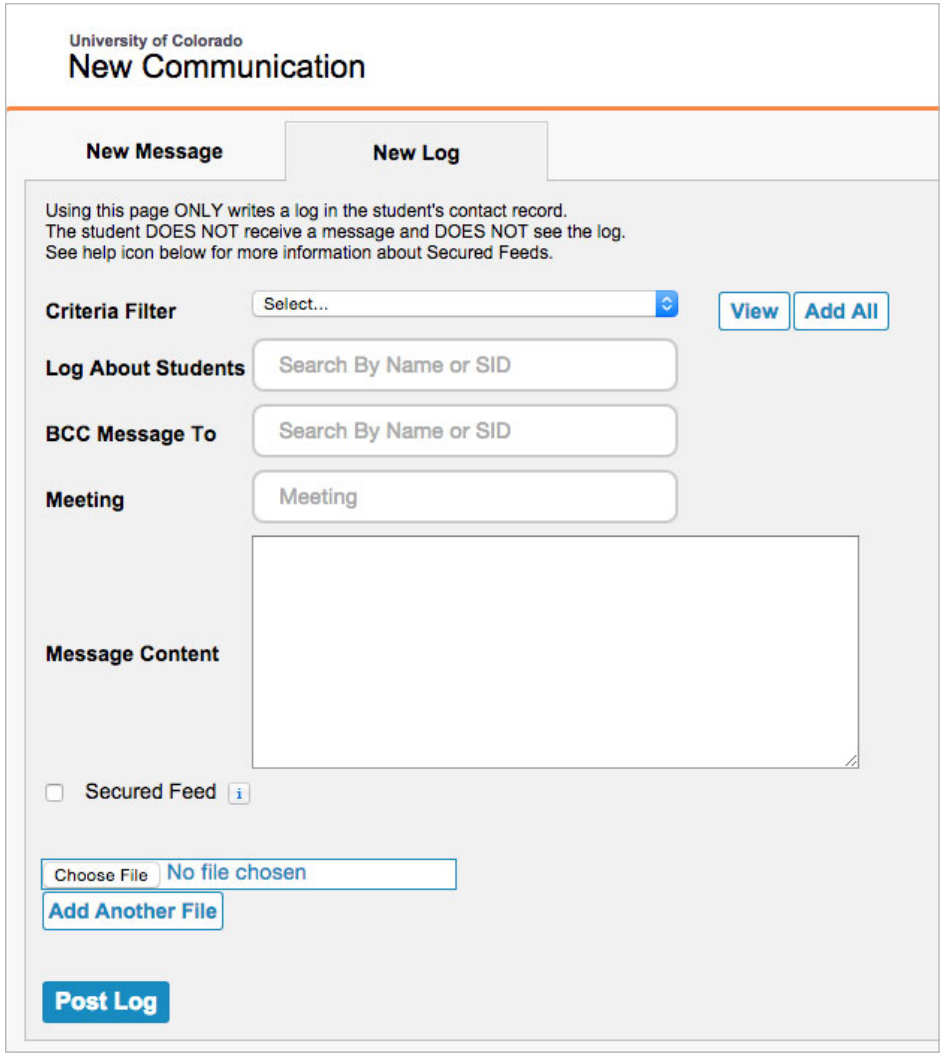
New Message creation form

Create New Meeting Logs

Create New Meeting Log

You should use the New Log functionality to capture notes from a meeting with a student.

1. Click **Message/Log**, located on the top navigational bar.
2. Click the **New Log** tab.
3. Choose your **Criteria Filter**.
   - Your chosen criteria will effect the available students to send messages to.
4. In the **Send Message To** field, enter the **student name** or **student ID**, then select the student from the menu that appears.
   - Repeat this process if you wish to add additional Students.
5. If you wish to have a user informed of the message but hidden from the student(s), use the **BCC Message to** field. Enter their name, then select the name from the menu that appears.
6. Type the associated meeting name in the **Meeting** field, then select the meeting name from the menu that appears.
7. Enter your notes in the **Message Content** field, then click the **Post Content** button.
   - You can choose to make the Log part of a Secured Feed and attach an associated file.
8. A **Success** message will appear at the top of the ***New Message*** area.



New Meeting Log creation form