

Buff Portal Advising

Student User Guide



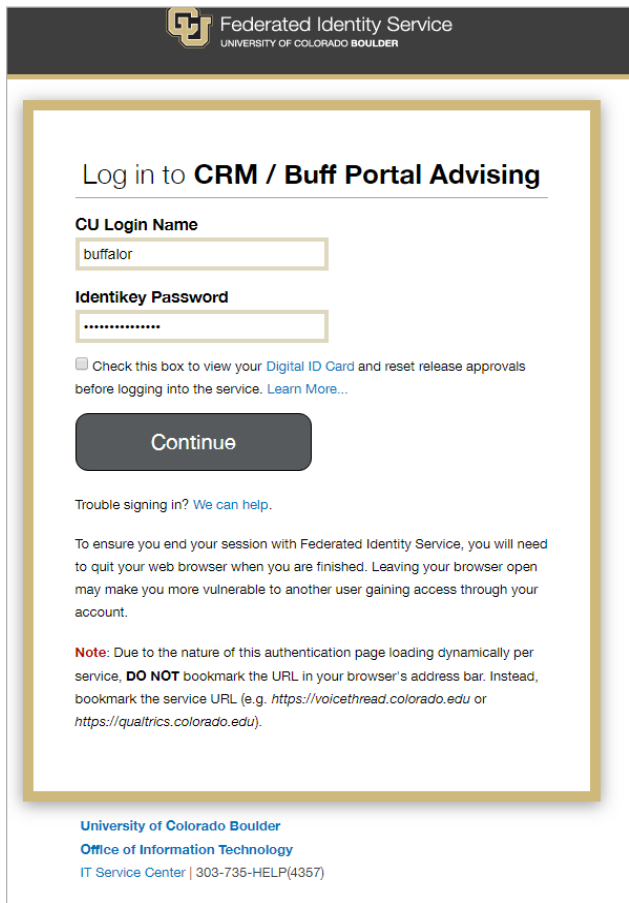
University of Colorado
Boulder

Login and User Interface

 <https://www.colorado.edu/buffportaladvising/>

 **CULoginName (also known as IdentiKey Username)**

 **IdentiKey Password**



Log in to **CRM / Buff Portal Advising**

CU Login Name
buffalor

Identikey Password
.....

Check this box to view your Digital ID Card and reset release approvals before logging into the service. [Learn More...](#)

Continue

Trouble signing in? [We can help.](#)

To ensure you end your session with Federated Identity Service, you will need to quit your web browser when you are finished. Leaving your browser open may make you more vulnerable to another user gaining access through your account.

Note: Due to the nature of this authentication page loading dynamically per service, **DO NOT** bookmark the URL in your browser's address bar. Instead, bookmark the service URL (e.g. <https://voicethread.colorado.edu> or <https://qualtrics.colorado.edu>).

University of Colorado Boulder
Office of Information Technology
IT Service Center | 303-735-HELP(4357)

Buff Portal Advising login page



- 1. Student Success Team:** Displays your success team. Click on their picture to schedule an appointment.
- 2. Student Services:** Links to calendars or websites for listed campus offices. *Note: Continuing Education is separate from CU Boulder main campus.*
- 3. Undergraduate Term by Term Summary:** Overview of your academic record. Lists current courses and grades, as well as cumulative summary of all terms.
- 4. Preferences:** Cog wheel icon that links users to notification settings (more on page 4).
- 5. Actions & Alerts:** Displays alerts and holds from campus offices.
- 6. Meetings:** A list of meetings, both past and pending.
- 7. Links:** Campus links including, Degree Audit and Buff Portal.
- 8. Academic Major/Minor:** A list of your enrolled majors and minors.
- 9. Placement Assessments:** Provides access to scores on math, language, writing and CliftonStrengths.
- 10. Undergraduate Performance:** Provides information on credit hours earned and GPA.

Appointments

Schedule an appointment

1. Click on a **Success Team Member's picture**, which will bring you directly to their calendar (step 2).
2. Select an available appointment time with the appropriate member of your success team. You can use the arrows at the top of the page to navigate to the following week.
Note: Drop-ins are not reservable.
3. Enter your reason for the appointment in the **Desired Outcome** field. The staff member may offer appointments in-person, by phone, or video advising (similar to FaceTime or Skype). When available, choose the option you prefer and click **Next**.
4. Confirm the information for your appointment and click **Book Appointment**. Buff Portal Advising will send an email confirmation of your appointment and reminders at 72 and 24 hours. You can also opt-in to text notifications (see page 5).

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Cancel an appointment or Change Meeting Format

- From the Buff Portal Advising home page navigate to the **My Meetings** box and click **Update**.
 - To Cancel** - On the Meeting Confirmation page, click in the box next to **Confirm Attendance** and select No – cancel appointment then **Save**.
 - To change Meeting Format** - On the Meeting Confirmation page, click in the box next to **Meeting Format** and select the desired format (when available) then **Save**.

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Appointment Calendar Tips

1 Calendar toggle

Click on a success team member's picture to toggle their calendar on and off.

2 Appointment type toggle

Filter available meetings by format type: in person, phone, video advising. Select **Drop-ins and Open Hours** to display or hide those meetings, and **Other Helpful Meetings** to show additional appointment options.

3 List view

Switch to **List** view by clicking the option in the top right. Select an available meeting time by clicking on the appropriate success team member's name.

The screenshot displays the appointment calendar interface. On the left, the 'My Success Team' section shows two members: Charles Eagan and Sarah Matsuda. A red box highlights Sarah Matsuda's name and profile picture, with a blue circle '1' next to it. Below this, the 'Select Format Section' has a dropdown menu set to 'Any'. The 'Other Filters' section has a blue circle '2' next to it, with 'Drop-Ins and Open Hours' checked and 'Other Helpful Meetings' unchecked. A 'Key' section at the bottom left explains the color coding for meeting availability. The main 'Meetings' section shows a calendar for August 1-7, 2021, with the 'List Day' view selected, indicated by a blue circle '3' and an arrow. The table below shows the meeting schedule for Monday, August 2, 2021.

Time Slot	Member	Availability	Action	Format	Member Name
8:30am - 9:00am	Charles Eagan	Not Available		Video Advising	Charles Eagan
9:15am - 10:00am	Sarah Matsuda	Not Available		Video Advising	Sarah Matsuda
9:15am - 9:45am	Charles Eagan	Available	Book Individual Appointment	Video Advising	Charles Eagan
10:00am - 10:45am	Charles Eagan	Available	Book Individual Appointment	Video Advising	Charles Eagan
10:00am - 10:45am	Sarah Matsuda	Not Available		Video Advising	Sarah Matsuda
10:45am - 11:30am	Sarah Matsuda	Available	Book Individual Appointment	Video Advising	Sarah Matsuda
11:00am - 11:45am	Charles Eagan	Available	Book Individual Appointment	Video Advising	Charles Eagan
11:30am - 12:15pm	Sarah Matsuda	Available	Book Individual Appointment	Video Advising	Sarah Matsuda
1:00pm - 1:45pm	Charles Eagan	Available	Book Individual Appointment	Video Advising	Charles Eagan

Calendar in list view

Preferences Center

1 Mobile Preferences

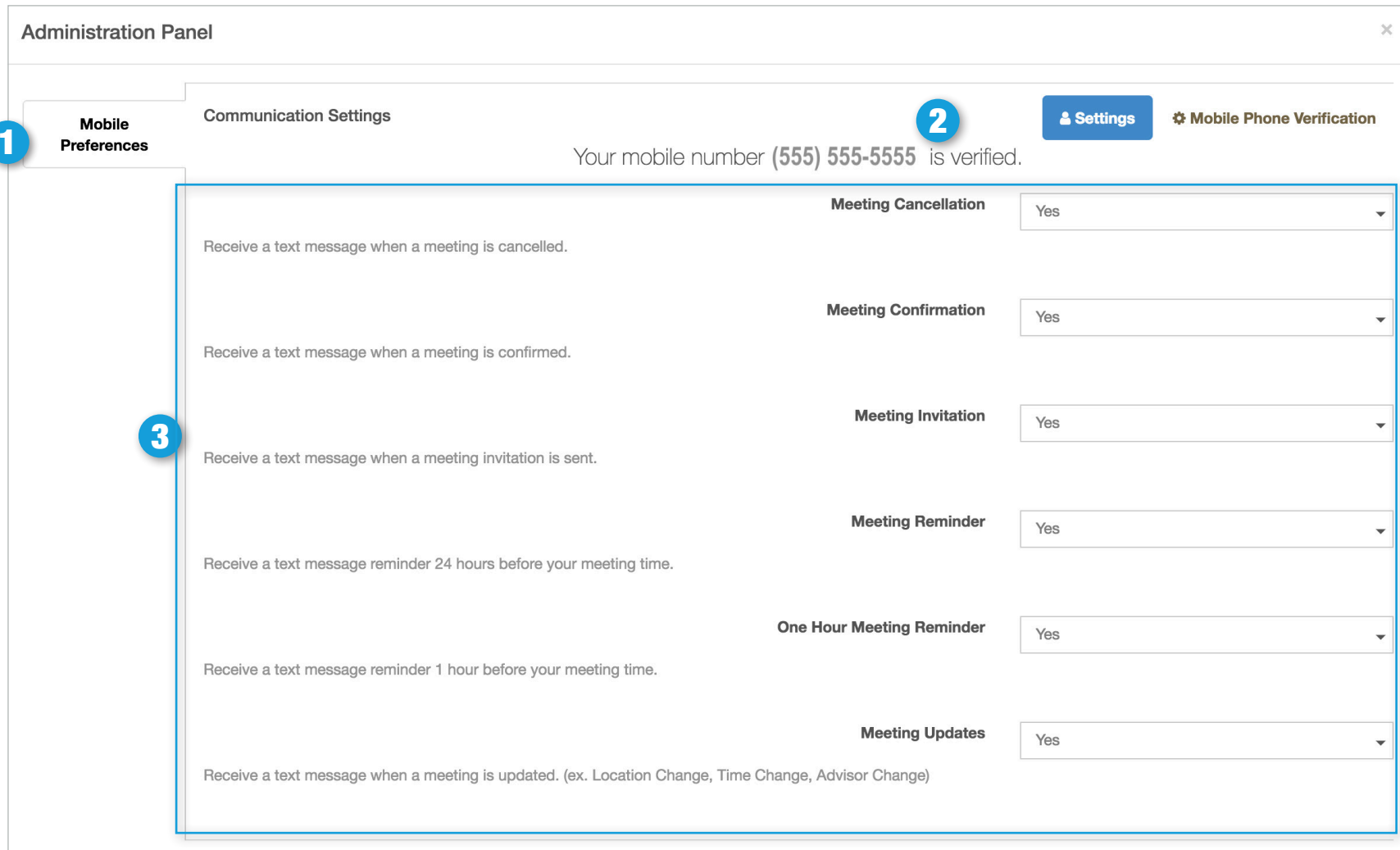
Opt in to receiving text messages related to meetings scheduled in Buff Portal Advising (confirmations, reminders, location changes, etc.)

2 Phone Number

To receive meeting information via text, first validate your mobile number.

3 Notifications List

Once validated, you will be able to specify what type of notifications to receive.



The screenshot shows the 'Administration Panel' with a 'Mobile Preferences' sidebar on the left. The main content area is titled 'Communication Settings' and includes a 'Settings' button and a 'Mobile Phone Verification' link. A status message indicates the mobile number '(555) 555-5555' is verified. Below this, a list of notification preferences is shown, each with a dropdown menu set to 'Yes'. The preferences are: Meeting Cancellation, Meeting Confirmation, Meeting Invitation, Meeting Reminder, One Hour Meeting Reminder, and Meeting Updates. A blue box highlights the notification list area, and a blue circle with the number '3' is placed next to it. Another blue circle with the number '2' is placed above the status message, and a blue circle with the number '1' is placed next to the 'Mobile Preferences' sidebar.

Administration Panel ✕

Mobile Preferences **Communication Settings** **2** [Settings](#) [Mobile Phone Verification](#)

Your mobile number **(555) 555-5555** is verified.

Receive a text message when a meeting is cancelled.	Meeting Cancellation	Yes
Receive a text message when a meeting is confirmed.	Meeting Confirmation	Yes
Receive a text message when a meeting invitation is sent.	Meeting Invitation	Yes
Receive a text message reminder 24 hours before your meeting time.	Meeting Reminder	Yes
Receive a text message reminder 1 hour before your meeting time.	One Hour Meeting Reminder	Yes
Receive a text message when a meeting is updated. (ex. Location Change, Time Change, Advisor Change)	Meeting Updates	Yes