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A *Schedules Quick View Tool* has been added to the schedules search results page. This feature allows Administrators to see an overview of the Schedule’s information and perform certain administrative actions without opening the full Schedule record. From the *Schedules Quick View Tool*, Administrators can see general information regarding the schedule as well as at-a-glance details such as the number of remaining available timeslots, and a numerical breakdown of Students’ Preselect Statuses (example: Selected: 8; Declined: 3, etc.). From the *Schedules Quick View Tool*, Administrators are also able to change the status of the schedule and even assign rooms to the schedule’s sessions.

**System Information**

- this feature is on by default (see below for deactivation details)
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

**How it works:**

The *Schedules Quick View Tool* can be accessed from two locations: the *schedules search results page* (Fig. 1-A), and the *Page Functions* menu in an individual schedule record (Fig. 1-B). From either location, simply click the Magnifying Glass icon to open the *Schedules Quick View Tool*.

**Setup: Turn Off Schedule Quick View**

The Schedules Quick View Tool is on by default in your site. To deactivate this feature, follow the steps outlined below.

1. Go to **Tools > Setup > Permissions**
2. Click + next to **Searches** > + next to **Search Results** > then click **Schedule**.
3. In the menu located on the right of your screen, click the **Edit** link next to **Function: View Dashboard** and select all user roles that should view this feature. After making all user role selections, click **Update**.
4. Click **Refresh** at the top of the screen to apply your changes.
The **Assign Job to Session** feature allows Administrators to link a specific job to a schedule’s specific session (Fig. 2-A). *(Note: Previous to the 2014 Summer Upgrade there was no way to define that a specific session was linked to a specific job posting when multiple job postings were linked to the schedule.)* Students applying to a schedule associated with multiple jobs will still be required to specify the specific job for which they want to interview. When it is time for the Student to signup for their timeslot, the Student will only see interview times of the job that they applied to. The ability to link job records to session records is especially useful for schedules with multiple sessions and multiple job postings.

**System Information:**
- this feature is on by default, no setup is required
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems
How It Works:

Students that apply to schedules associated with multiple jobs must specify the specific job for which they are applying. Furthermore, if a schedule’s specific session is linked to a specific job through the Assign Job to Session feature, the Student can only sign up for timeslots in the specific session tied to the specific job for which they applying.

(Example: Student views Employer’s interview schedule and sees Employer is conducting interviews for two Jobs: accountant and engineer. There are two interview Sessions associated with each job - two Sessions associated with the accounting Job and two sessions associated with the engineering Job. The Student signs up for an interview associated with the accountant Job, and, if this setting is used, the system forces the Student to sign up for the specific interview Session that is associated with the specific Job as defined by the Administrator.)

To link a job to a session:

1. Open the selected Schedule and click the appropriate Session ID
2. In the session record, click either the Session Information tab or the Edit link in the Session Information section
3. View the Limit Signup to Jobs field and select the specific job(s) that should be tied to the selected session (Fig. 2-B)
4. Click Save

Setup: None Required

No setup is required. Note: If you do not assign specific jobs to specific sessions, the system will work as it has previously and applicants will not have specific session assignments.
New Feature
Convert Preselect to Open

The Convert Preselect Schedule to Open Schedule feature allows a preselect schedule to automatically convert to an open schedule once all accepted Students have selected a schedule timeslot. Once a preselect schedule converts to an open schedule, only qualified Students will be able to sign up for the schedule’s remaining timeslots. The Convert Preselect Schedule to Open Schedule feature streamlines the schedule process and helps fill empty timeslots that might otherwise have remained empty.

System Information:
- this feature is off by default, setup is required (see below for details)
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How It Works:
The Convert Preselect Schedule to Open Schedule function is controlled by a date field in the schedule’s Timeline section (Fig. 3-A) This field operates the same way as other schedule timeline fields in that the date entered into the field is the date that the function activates. The date entered in the Convert to Open Schedule field must be AFTER the Accepted Student Sign-up Open date but BEFORE the Sign-up Closed date.

Fig. 3-A
The Convert Preselect Schedule to Open Schedule function is off by default in your site. To activate this feature, follow the steps outlined below:

1. Go to **Tools > Setup > Permissions**

2. Click the + next to **Forms** > + next to **Schedule** > + next to **Schedule** > then click **Timeline** (Fig. 3-B)

3. In the menu located on the right of your screen, click the **Edit** link next to **Convert to Open Schedule-View** and select all user roles that should have view rights for this function. (*IMPORTANT: In order for a user to utilize this feature, they must be granted view rights.*) Click **Update** once you have made all user role selections for view rights.

4. In the menu located on the right of your screen, click **Edit** next to **Convert to Open Schedule-Edit**, then select all user roles that should have edit rights for this function. After making all user role selections for edit rights, click **Update**. (Fig.3-C)

5. Click the **Refresh** button at the top of your screen to complete your changes.

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**Fig. 3-B**

**Fig. 3-C**
New Schedules Feature
Session Timeslot Timeslide

Adjusting schedule timeslots has never been easier than with the new *Session Timeslot Timeslide Tool*. With this new tool, Administrators are able to adjust a session’s timeslots in mass. There are two elements to this tool: 1. If an Administrator adjusts the time of a single timeslot, the system will prompt the Administrator with a pop-up window providing the option to update all subsequent timeslots accordingly. 2. If an Administrator changes the interview duration (length of each timeslot), the system will prompt the Administrator with a pop-up window providing the option to adjust all unreserved timeslots to the new duration.

**System Information:**
- this feature is on by default, no setup is required
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

**How It Works:**

Timeslot time adjustment (Fig. 4-A):
1. Go to a session and click on the individual timeslot for which the time needs to be adjusted.
2. Edit the time of the timeslot and click Change Time/Reserved Timeslot.
3. An *Adjust Timeslot* prompt will appear asking whether you would like to adjust all subsequent timeslots.
4. Select Yes.

Timeslot duration adjustment (Fig. 4-B):
1. Go to the session for which you would like to change the timeslot duration.
2. Edit the Session Information section and change the *Interview Duration* number.
3. An *Adjust Timeslot* prompt will appear asking whether you would like to adjust the duration of all timeslots.
4. Select Yes
On a per schedule basis, Administrators now have the ability to enable the system setting that hides the list of preselected Students from Employers until after the schedule’s Request Period Close date has passed. *Note: Previous to the 2014 Summer Upgrade this was a system-wide setting that could not be controlled on a per schedule basis.* The ability to control this setting per schedule gives Administrators more control and flexibility. This setting helps level the playing field for Students so that an Employer is forced to see all preselected Students at once, rather than as each Student applies.

**System Information**

- this feature is on by default (see below for deactivation details)
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

**How It works:**

To set up an individual schedule so that the Employer cannot view preselected Students until after the schedule’s **Request Period Close** date: Open the schedule, go to the Timeline section of the schedule record, set the **Allow Employer View of Preselects** field to **No** (Fig.5-A). When enabled, this setting will hide the Manage Preselect link from Employers until the schedule’s **Request Period Close** date has been reached.

To set up an individual schedule so that the Employer will view preselected Students as they apply: Open the schedule, go to the Timeline section of the schedule record, set the **Allow Employer View of Preselects** field to **Yes**.
Setup: Hide Feature

The **Allow Employer View of Preselects** field is on in your system by default. If you wish to hide this field from your Schedule setup screen, follow the instructions outlined below.

1. Go to **Tools > Setup > Permissions**
2. Click + next to Forms > + next to Schedule > + next to Schedule > then click Timeline (Fig. 5-B)
3. In the menu located on the right of your screen, click the **Edit** link next to **Allow Employer View of Preselects - View** and select all user roles that should have view rights for this function. (*IMPORTANT: In order for a user to utilize this feature, they must be granted view rights.*) Click **Update** once you have made all of your selections for user view rights.
4. In the menu located on the right of your screen, click the **Edit** link next to **Allow Employer View of Preselects - Edit** and select all user roles that should have edit rights for this function. Click **Update** once you have made all of your selections for user edit rights (Fig. 5-C).
5. Click the **Refresh** button at the top of your screen to complete your changes.

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**Fig. 5-B**

**Fig. 5-C**
The Employer Preselect Limit is a system setting that allows Administrators to control the number of Students an Employer can accept for a preselect schedule. If enabled, the Employer Preselect Limit setting will limit Employers to accept only as many Students as there are available timeslots on the schedule. (Example: If there are seven available timeslots, only seven preselect Students may be accepted by the Employer.) The system will display a countdown number for remaining available timeslots as Employers accept each Student. When the final remaining Student selection needs to be made, the Employer will be alerted that upon making this selection, the preselect limit will be reached.

System Information

• this feature is off by default
• this feature is available to all product levels with the exception of Basic and Job Board systems
• this feature is not customizable per college in Enterprise Systems

How It works:

If the Employer Preselect Limit setting is enabled in your site, both Employers and Administrators are limited to only accept as many preselect Students as there are timeslots available. Both Employers and Administrators can view the number of accepted Students allowed at the top of the Manage Preselects page. To get to the Manage Preselects page, click the Manage Preselects link in your left Page Functions menu from a schedule record. As an Employer or Administrator accepts Students, the count of accepted Students adjusts. Once the Employer or Administrator has reach the Preselect limit, the system presents a popup warning them that the limit has been reached and deselects the last accepted Student so that the accepted Student count does not exceed the preselect limit (Fig.6-A).
The Employer Preselect Limit feature is off by default in your site. To activate this function, you will need to follow the steps outlined below.

1. Head to Tools > Setup > Settings
2. Locate the Schedule - Limit Total Preselects to Number of Open Timeslots setting and click the Edit link to the right of the setting (Fig.6-B)
3. Flip the setting to True and click Update
4. Click Refresh at the top of your screen to apply these changes
New Feature
Additional Recruiter Fields

Two new fields have been added to the Attending Recruiters section of session records: **Title** and **Alumni**. These additional fields allow you to collect more information about recruiters managing or conducting on-campus interviews. As with most system fields, these new fields can be renamed or removed. The **Title** field is an open text field and the **field** is a check box (7-A).

System Information

- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

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New Feature
No Show Timeslot Status

A new status of **No Show** is available for each timeslot on a schedule session. Administrators are able to manually select the **No Show** status in order to indicate in the Student's Activity that the Student was a no show for the scheduled interview. A Student's No Show status can be viewed in the session record next to the Student's timeslot and in the Student's schedule activity. **No Show** status can be reported on through a **Schedule-Timeslots** report.
System Information

- this feature is on by default (see below for deactivation details)
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How It works:

To mark a Student as a **No Show**: Navigate to the Schedule's Session and locate the Student in the Timeslot section of the session record. Click **Set No Show** located to the right of the Student's name. After marking the Student as a **No Show**, the session and the Student's activity is updated to reflect this information. To reverse the No Show status: Click **Remove No Show** located to the right of the Student's name in the session’s Timeslot section (Fig. 8-A).

Fig. 8-A
Setup:
Turn Off Feature

The No Show Timeslot feature is on by default in your site. To deactivate this function, follow the steps outlined below.

1. Go to Tools > Setup > Permissions.
2. Click + next to Forms > + next to Schedule > + next to Session > then click Timeslots. (Fig. 8-B)
3. In the menu towards the right of your screen, click the Edit link next to Function: No Show-View and deselect all user roles for which you wish to hide this function. Click Update once you have made all of your selections (Fig. 8-C).
4. Click the Refresh button at the top of your screen to apply your changes.

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Fig. 8-B

Fig. 8-C
New Feature

Remaining Timeslots Available

The system provides a countdown of remaining session timeslots through the Remaining Timeslots Available field. This field is located in the Session Information section of session records and can be viewed by both Employers and Administrators. The count of remaining timeslots is automatically updated by the system, so the Remaining Timeslots Available field is especially useful for reporting on past interview schedules (Fig-9-A).

System Information

- this feature is on by default (see below for deactivation information)
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How It Works:

The Remaining Timeslots Available field is automatically updated by the system as a schedule's timeslots are either reserved or filled by Students. To report on the Remaining Timeslots Available field, run a schedule report and select Session from the dropdown menu.

Fig. 9-A

Viewing Schedule: 561/University of Tennessee, University Center
Linked Jobs: 415/Advertising Account Executive

Profile View  Session Information  Recruiters

Session Information

session.aspx_pnlSessionView

Session ID: 291
Linked To Schedules: 561/University of Tennessee, University Center
Organization Name: University of Tennessee, University Center
Limit Signup To Jobs: Currently no job postings
Interview Date: 10/1/2014
Interview Duration: 30
Interview Location:
Room Assignment: Interview Room 200
Additional Interview Information: Remaining Timeslots Available: 13
Status: Active

Created: 6/26/2014 6:28 AM
Modified: 6/26/2014 6:28 AM
Setup: Turning off the Remaining Timeslots Available field

The Remaining Timeslots Available field is on by default in your site. To hide this field or remove it entirely:

1. Go to **Tools>Setup>Permissions**.
2. Click + next to Schedule> + next to Session> then click **Session Information** (Fig. 9-B)
3. In the menu that appears on the right of the screen, click **Edit** next to **Open Slots-View** (Fig. 9-C)
4. De-select the user roles from which you wish to hide this feature and click **Update**.
5. Click **Refresh** at the top of the page.
New Feature
Rooms to Sessions

Functionality has been added to the **Number of Rooms Needed** in the Interview Request Preferences section of the Schedule record. When an Employer submits a schedule request, the information submitted for the **Number of Rooms Needed** and Timeslot Template fields carry over as apart of the pending schedule record Administrators approve. The number of rooms the Employer indicates as needing will create **Reservation Dates** for the Employer’s **Interview Date** and allow quick access to assign an available room to that date. From this screen, Administrators are also able to assign a timeslot template that the Employer selected or manually configure a session to create a customized set of timeslots.

**System Information**
- this feature is on by default
- this feature is available to all product levels except for Basic or Job Board systems
- this feature is not customizable per college in Enterprise Systems

**How It Works:**

When an Employer submits a Schedule request, the system takes into account, the Interview Date, Number of Rooms Needed, and Session details (or timeslot template) to create a prepopulated screen for the Administrator approving the record. The Administrator is able to review the information provided by the Employer and proceed through the creation of the schedule. When it comes time for the system to create the schedule’s session, the Administrator will see a screen prepopulated with the room and session information provided by the Employer. The Administrator can make their selections on interview dates, rooms, and session details and continue on with the Schedule wizard (Fig. 10-A).

![Fig. 10-A](image-url)
New Feature
Employer Allow Alternates

Employers are now able to specify whether their preselect interview schedule should allow alternate students with the new Allow Alternates field on the Employer schedule request form.

System Information

- this feature is off by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How It Works:

Administrators reviewing Employer schedule requests can view the Employer’s selection for the Allow Alternates field (11-A). The Administrator may either maintain or adjust the Employer’s selection. If a preselect schedule is set to allow alternates, the Employer and/or Administrator can accept, and rejecting Students for the interview, as well as mark Students with the Alternate selection status (Fig. 11-B). Students marked as Alternate are able to select an interview timeslot when the schedule has reached the Alternate Students Sign-up Open date in the schedule’s timeline.
Setup: Turn On Feature

The **Allow Alternates** field is off for Employers in your system by default. If you wish to turn this field on for Employers, follow the instructions outlined below. (IMPORTANT: *in order to fully hide this field for selected user roles, the selected user roles must be adjusted to remove both view and edit rights as defined in the steps below.*)

1. Go to **Tools > Setup > Permissions**.
2. Click + next to **Forms** > + next to **Schedule** > + next to **Schedule** > then click **Timeline**.
3. Edit and select all user roles you want to see this function. Click **Update** once you have made all of your selections.
4. Click the **Edit** link next to **Allow Alternates - View** and select all user roles for which you want to edit this function (*note: in order to turn off a function, a user role should not be allowed to view or edit the function*). Click **Update** once you have made all of your selections.
5. Click the **Refresh** button at the top of your screen to complete your changes.

New Feature

Master Calendar

The **Master Calendar** allows Administrators to view all appointments for their office, including those of other Administrators. The **Master Calendar** allows Administrators to see all available un-booked appointments, as well as to book appointments for him/herself and other Administrators. When using the **Master Calendar**, Administrators have the option to filter displayed appointments by Administrators or Appointment Types (Fig. 12-A).

![Fig. 12-A](image-url)
**System Information**

- this feature is on by default (see below for deactivation details)
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is customizable per college in Enterprise Systems

**How It works:**

To view your *Master Calendar*, click the Appointment Calendar link in your left navigation menu (Fig. 12-B). To filter information displayed in your *Master Calendar*, use the drop-down menus located above the calendar. To book an appointment for yourself or another Administrator, double click on an Open appointment block. Open appointments are color coded as yellow. *Note: Appointments can only be booked for times that are set as available by the Administrator in the Availability section of the Administrator profile.*

**Setup: Turn It Off**

The Master Calendar feature is on by default in your site. To deactivate this function, you will need to follow the steps outlined below.

1. Go to **Tools > Setup > Permissions**
2. Click the + next to Searches > the + next to Search Results > then click Schedule
3. In the menu towards the right of your screen, click the **Edit** link next to **Function: View Dashboard** and deselect all user roles for which you wish to hide this function. Click **Update** once you have made all of your user role selections.
4. Click **Refresh** at the top of the screen to apply your changes.
New Feature
Screening by Appointment Types

Administrators can set Appointment Types to screen Students based on specified Student criteria. With the new screening capabilities, Appointment Types can be set up to screen Students based on major, classification, degree, system qualifiers, and colleges*.

(*Note: the college field is visible in Enterprise sites only.) (Fig. 13-A). This capability is especially useful if your office has specific appointment types that should only available to a specific type of Student (e.g., Biology majors should only meet with specific career counselors).

System Information

- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How it works:

When screening by Appointment Types, Students making an appointment will see only open appointments for which they qualify. If an Administrator attempts to schedule a Student for an appointment for which the Student does not qualify, the system will warn the Administrator that the Student does not qualify but will allow the Administrator to override that warning.

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Fig. 13-A
Setup: Add Screening to Appointment Types

The ability to screen Students through Appointment Types is on by default in your site. The instructions below outline adding screening to an existing Appointment Types as well as adding screening when creating a new Appointment Type.

1. Go to Tools> Setup> Appointment Types
2. To add screening to: Existing Appointment Type - Click Edit to the right of the Appointment Type you wish to edit. New Appointment Type you are creating - Click Add New to the right of the screen.
3. Go to the section labeled Screening Options located near the middle of the Appointment Type setup screen.
4. Select the criteria Students must meet to book this appointment. To select multiple options in the multi-select boxes, hold ctrl+click.
5. To complete the process for: Existing Appointment Type - Click Save at the bottom of your screen New Appointment Type you are creating - Continue and complete the rest of the setup sections. After completing the setup sections, click Save.

New Feature
Appointment Documents

A Document Categories section has been added to Appointment Types so that Administrators can either allow or require certain documents from the Student at the time a Student's appointment is booked.

System Information

- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How it works:

If an Appointment Type has been set to require specific documents, the Administrator or Student booking the appointment will be required to upload the necessary documents before the Student appointment booking can be finalized. When booking an appointment that allows or requires documents, the system displays a list of required documents and an upload link where Student documents can be selected and uploaded. After a Student uploads their document to the appointment, the Administrator can view the Student’s document through the Document section of the appointment record (Fig. 14-A).
Setup: Require Documents for Appointment Type

The ability to allow or require documents for certain Appointment Types is on by default in your site. The instructions below outline adding the ability to upload documents to existing Appointment Types as well as adding this ability when creating new Appointment Types.

1. Go to **Tools > Setup > Appointment Types**
2. To add ability to upload documents to:
   - **Existing Appointment Types** - Click **Edit** to the right of the Appointment Type you wish to edit.
   - **New Appointment Type you are creating** - Click the **Add New link** located on the right of your screen.
3. Go to the section labeled Document Categories located near the middle of the Appointment Type setup screen.
4. Select which documents you want to allow Students to upload and which documents you want to require Students to upload before booking their appointment (Fig. 14-B).
5. To complete the process for:
   - **Existing Appointment Types** - Click **Save** at the bottom of the screen.
   - **New Appointment Type you are creating** - Continue and complete the rest of the setup sections. After completing the setup sections, click **Save**.

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New Feature

Creating Ad Hoc Appointments

If your system is set to allow ongoing Day of the Week Appointment Types (Example: Resume reviews every Monday from 9:00 – 11:00 am), there may be times that you want to add an appointment that does not fit in that framework. The Ad Hoc Appointments feature provides Administrators with the ability to create an appointment in their Appointment Calendar even when the majority of the appointments have been scheduled as ongoing Day of the Week Appointments. Ad-Hoc Appointments are not reserved appointments but rather additional times that the Administrator is available in addition to ongoing Day of the Week Appointment Types.

System Information

- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How it works:

Ad-Hoc Appointments allow Administrators the flexibility to schedule an Appointment Type outside of ongoing Day of the Week Appointments. To create an Ad-Hoc Appointment:

1. As an Administrator, click the My Profile menu in the top navigation bar.
2. In the left Page Functions menu, click View Appointment Calendar (Fig. 15-A).
3. Double click the calendar time during which you want to create your Ad-Hoc Appointment.
4. Select Ad Hoc Open Student Appointment as the Appointment Type To Create (Fig. 15-B).
5. Complete the Appointment Details and click Save.

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New Feature
Range of Recurring Appointments

Administrators using ongoing Day of the Week Appointment scheduling can define a date range for which they are available for an Appointment Type. Previous to this release, Administrators could only select available day of the week and available times for a specific Appointment Type. With the development of Range of Recurrence Appointments, Administrators have the control to set a beginning availability date and an ending availability date for an Appointment Type.

System Information:
- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How it Works:
The Range of Recurrence setting allows Administrators to set the start date/time and end date/time that for an Appointment Type to be included in an Administrator’s Availability. An Administrator’s Availability is customizable per Administrator and controls the Student view of the Administrators available for your system’s Appointment Types.

Setup: Setting Range of Recurrence

The Range of Recurrence feature is on in your site by default. To set a Range of Recurrence for an Appointment Type:

1. Click the My Profile menu in the top navigation bar to open your Administrator profile.
2. Navigate to the Availability section of your profile and click Edit on the right of this section.
3. Click Edit for the Appointment Type for which you wish to add a Range of Recurrence.
4. At the bottom of the availability setup screen, select a Start Date and End Date to mark the Range of Recurrence for your Appointment Type (17-A).
5. Click Save.
Communication related to the Appointment Scheduler tool has been overhauled to include more flexibility than ever before (Fig. 18-A). Capabilities include:

**Confirmation Email Enable/Disable**: Administrators control whether Administrators and Students should receive the confirmation email triggered when a Student books an appointment in the system. This setting is controlled per Appointment Type.

**Confirmation Email CC**: A carbon copy (CC:) address option in the Confirmation Email allows the system generated appointment confirmation email to be copied to the email address of your choice. This setting is controlled per Appointment Type.

**Confirmation Email Customization**: Administrators can customize the Confirmation Email triggered to Student and Administrators when an appointment is booked within the system. This email has the ability to merge in information from the Student’s profile.

**Reminder Email Enable/Disable**: Administrators can control whether the Appointment Student reminder email will be sent for specific Appointment Types. This email is sent only to Students.

**Reminder Email Customization**: Administrators can customize the reminder email sent to Students that have booked appointments in the system. This email also has the ability to merge information in from the Student’s profile. The reminder email message is a system event email housed in your system’s email templates.

**Follow-up Email Enable/Disable**: Administrators can define whether the Appointment Follow-up Email sends to Students for each Appointment Type.

**Follow-up Email Lag Days**: Administrators can define when the appointment Follow-up email will be sent to Students by using the Follow-up email lag days field. The number of lag days set for the Follow-up email determines how many days after the appointment the Student receives the follow-up email.

**Follow-up Email Customization**: Administrators can set up a customized Follow-up email to send to Students after their appointment has passed. The Follow-up Email message is customized within the Appointment Type.
System Information

- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems
Setup: Enable/Disable Confirmation Email

The option to enable or disable the appointment scheduler confirmation email is found in the Appointment Type setup screen. To edit this setting:

1. Go to Tools > Setup > Appointment Types and click Edit to the right of the Appointment Type you plan to edit.
2. Scroll down to the Email Options section of the setup page:
   - To enable the email for Administrators and/or Students, select Enable Confirmation Email.
   - To disable the email for Administrators and/or Students, de-select Enable Confirmation Email.
3. Click Save at the bottom of the screen.

Setup: Add a CC address

The option to add a CC email address to the appointment scheduler confirmation email is found in the Appointment Type setup screen. To see this setting, follow the instructions outlined below.

1. Head to Tools>Setup>Appointment Types and click Edit to the right of the Appointment Type you plan to edit.
2. Scroll down to the Email Options section of the setup page and locate the Confirmation Email CC Address field. Simply add an email address to add a CC recipient to the confirmation email.
3. Click Save at the bottom of your screen.

Setup: Customize Confirmation Email

Like most automatic emails in the CSO System, the Appointment Confirmation email is customized through Tools>Setup>Templates. To customize this email:

1. Go to Tools>Setup>Templates and locate the ALL-Appointment Confirmation email.
2. Click the Word document icon located on the right. Customize the email message in the Word document and save those changes in Word. Proceed back to your CSO System and click Edit and then Upload to upload your revised Word document.
3. After uploading your revised email template, click Refresh at the top of the screen.

OPTIONAL: If you wish to merge Student information into your Confirmation email template, review the following tutorial on mail merges: http://www.screencast.com/t/fiPm2qNwbw
Setup: Enable/Disable Appointment Reminder Email

The option to enable or disable the appointment scheduler reminder email is found in the Appointment Type setup screen. To see this setting, follow the instructions outlined below.

1. Go to **Tools > Setup > Appointment Types** and click **Edit** to the right of the Appointment Type you wish to edit.
2. Scroll down to the Email Options section of the setup page: To enable the email select **Enable Reminder Email**. To disable the email deselect **Enable Reminder Email**.
3. Click **Save** at the bottom of the screen.

Setup: Customize Appointment Reminder Email

Like most automatic emails in the CSO System, the Appointment Reminder email is a customizable template housed in **Tools>Setup>Templates**. To customize this email:

1. Go to **Tools>Setup>Templates** and locate the **STUDENT- Approaching Appointment email**
2. Click the Word document icon located on the right. Customize the email message in the Word document and save those changes in Word. Proceed back to your CSO System and click Edit and then Upload to upload your revised Word document.
3. After uploading your revised email template, click **Refresh** at the top of the screen.

OPTIONAL: If you wish to merge Student information into your Confirmation email template, review the following tutorial on mail merges:

http://www.screencast.com/t/fiPm2qNwbw

Setup: Enable/Disable Student Follow-up Email

Administrators can enable or disable the appointment scheduler follow-up email in the Appointment Type setup screen. To adjust this setting:

1. Go to **Tools>Setup>Appointment Types** and click **Edit** to the right of the Appointment Type you wish to edit.
2. Scroll down to the Email Options section of the setup page:
   - To enable the email select **Enable Student Follow-up Email**.
   - To disable the email deselect **Enable Student Follow-up Email**.
3. Click **Save** at the bottom of your screen.
Setup: Set Lag Days
Student Follow-up Email

Administrators can set the number of days after an appointment that the system's Student Follow-up email should be sent. This is set in the Appointment Types setup screen. To adjust this setting:

1. Head to Tools > Setup > Appointment Types and click Edit to the right of the Appointment Type you wish to edit.
2. Scroll down to the Email Options section of the setup page and set the Days After Appointment To Send Follow-up Email field to reflect the number of days after an appointment that the follow-up emails should be sent.
3. Click Save at the bottom of your screen.

Setup: Customize Follow-up Email

Administrators can customize the Follow-up email message sent to Students through the Appointment Type setup screen. To customize the Follow-up email message, follow the instructions outlined below.

1. Go to Tools > Setup > Appointment Types and click Edit to the right of the Appointment Type you wish to edit.
2. Scroll down to the Email Options section of the setup page and type your email message into the Student Follow-up Email Message field.
3. Click Save at the bottom of your screen.

Updated Feature
Enhanced Future Sign-up Days

The Future Sign-up Days control on the Appointment Type screen has been improved in two ways: 1) There are now two Future Sign-up Day controls, one for Administrators and one for Students and 2) the Future Sign-up Day can now exceed 30 days. The number entered in the Future Sign-up Day designates the number of days into the future that the Administrator or Student will be able to see available appointments on the calendar from the current date (Fig. 19-A).

System Information

- this feature is on by default
- this feature is available to all product levels except for Basic or Job Board systems
- this feature is not customizable per college in Enterprise Systems
Administrators can specify Appointment Location from within the Administrator Availability section of their profile. (Previous to the 2014 Summer Upgrade, the appointment location could only be set in the Appointment Type setup page.) Since the Appointment Location field has moved to the Availability section of the Administrator's profile, Administrators can specify their own appointment locations for Appointment Types (Fig. 20-A).
Setup: Assign Appointment Location

The Appointment Location field is on in your site by default. To edit or set the location of your appointments (Fig. 20-A):

1. Click the My Profile menu item in the main navigation bar.
2. Scroll down to the Availability section of your profile and click Edit.
3. Click Edit located to the right of the Appointment Type for which you want to set a location.
4. In the Appointment Location field, type the location you would like Students to view as they search and book this appointment.
5. Click Save.

New Feature
Appointment Limit

Administrators can limit the number of Student appointments allowed on their calendar per day with the new Appointment Limit field. The Appointment Limit field is located in the Control Information section of Administrators’ profile. Once an Administrator’s per day maximum is reached, no further Student appointments can be scheduled for that Administrator on that day.
How it works:

The new Appointment Limit feature is controlled by the Max Appointments Per Day field in the Administrator profile. Each Administrator is able to set their own limit. Once an Administrator’s daily appointment limit has been reached, Students will not see that Administrator (or their appointments) as an option in their appointment search for that day. Keep in mind that the Student may still see the Administrator as an option for appointments that fall on a day on which the Administrator’s Appointment Limit has not been reached. If an Administrator wishes to allow infinite Student appointments on their calendar each day, the Administrator may either leave the Max Appointments Per Day field blank or enter a 0 (Fig.21-A).

New & Updated Features

Appointment Activity

1. Customize Default Fields: Administrators can edit and control appointment fields. Fields on appointment records can be renamed in Tools> Setup> Forms and their view/edit permissions can be managed in Tools> Setup> Permissions.

2. Custom Fields: Custom fields can be added to appointment records. Custom fields are a great way to track and organize additional details unique to your office.

3. *Created By: When using Audit Tracking Add-on, appointment records track which user created an appointment as well as what type of user they are (Student or Administrator). This information is reportable and can be managed in the system’s permissions.

4. *Creation Timestamp: When using Audit Tracking Add-on, a creation timestamp in the Details section of appointment records will track both the date and time that an appointment was booked. This information is reportable.

(*Audit Tracking features are available only in CSO Systems with the Audit Tracking Add-On.*)
Several modifications have been made to the canceling appointment canceling process. These changes are outlined below.

1. If an Administrator cancels an appointment it will not be deleted from the CSO System, rather it will be maintained as a Canceled appointment record which allows Administrators to more accurately report upon canceled appointments. Canceled appointment records will automatically be assigned a Canceled status.

2. On a per appointment basis, if an appointment is canceled, the time can be reopened for a new student to select. To reopen an appointment, set the Reopen upon Cancellation field to yes. The Reopen upon Cancellation field is found in the Details section of appointment records. As you cancel an appointment, you are also presented with the option to reopen the record for other Students (Fig 22-A).

3. When user cancels an appointment, they can include a message/note about the cancellation that will be visible to the Student and Administrator (Fig 22-A).

Fig. 22-A
How it works:

Appointments can be canceled by either Students or Administrators. *(Note: a Student can only cancel an appointment before the appointment's Freeze date.)* The user canceling an appointment is able to submit a cancellation note that is visible to either the Student or the Administrator. When an appointment is canceled, the Student or Administrator receives an email notification of the cancellation. The system automatically assigns a Canceled status to canceled appointments. If the Administrator wishes to reopen the canceled appointment for another Student to select, the Administrator must make sure the appointment’s Reopen upon Cancellation field is set to yes.

Updated Feature

Student Appointment Search

Students can search available appointments by week. *Prior to the 2014 Summer Upgrade, Students were only able to search appointments by Appointment Type.*

System Information:

- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems
As Students search available appointments, they can specify their **Reason for Visit**. The information entered in the **Reason for Visit** field is retained in the Appointment record and can be edited by the Administrator. As with most system fields, the **Reason for Visit** field can be renamed, required, or removed.

**System Information:**
- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems
Setup: Disable Reason For Visit Field

The Reason for Visit field is on in your system by default. To adjust the view/edit permissions for this field or turn it off entirely:

1. Go to **Tools>Setup>Permissions**
2. Click **+ next to Forms> + next to Appointment> click on Details.**
3. In the menu located on the right of your screen, click the **Edit** link next to **Details-View** and deselect all user roles that should not have view rights for this function. *(IMPORTANT: In order for a user to utilize this function, they must be granted view rights.)* Click **Update** once you have made all user role selections for view rights.
4. In the menu located on the right of your screen, click **Edit** next to **Details- Edit**, then deselect all user roles that should not have edit rights for this function. After making all user role selections for edit rights, click **Update**.
5. Click the **Refresh** button at the top of your screen to complete your changes.

---

**Fig. 24-A**

**Fig. 24-B**

<table>
<thead>
<tr>
<th>Permissions</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Type - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Cancellation Message - Edit</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Cancellation Message - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Checkin Date - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Created - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Created By - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Description - Edit</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Description - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Details - Edit</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Details - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>End Time - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>End Time Display - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Hide Administrator - Edit</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Hide Administrator - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Location - Edit</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Location - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Modified - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Record ID - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Re-Open - Edit</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Re-Open - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Section - Edit</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Section - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Start Time - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Status - View</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Student Followup Required - Edit</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Student Followup Required - View</td>
<td>[Edit]</td>
</tr>
</tbody>
</table>
The **Reason for Visit** field is on in your system by default. To rename or require this field, follow the instructions outlined below.

1. Go to **Tools > Setup > Forms**.
2. Select **Appointment** as **Form Type** and **Reason for Visit** as the **Form Item**.
3. To rename the field, adjust the **Display Text** field. To adjust the field’s requirement, change the selection in the **Required** field.
4. Click **Save** and then the **Refresh** button at the top of the page.

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**Fig. 25-A**
Updated Feature

Maximum Appointments

The number of appointments a Student can book within a given period is controlled by a new field (Max No. of Appointment) and system setting (System-Appointments-Rate of Frequency Checks). In the Control Information section of Students’ profiles, the Max No. of Appointment (Fig. 26-A) field can be used to specify how many appointments the Student is able to book within the range set by the System-Appointments-Rate of Frequency Checks setting found in Tools>Setup>Settings (Fig. 26-B). Since these two fields work together, it is important to keep both in mind as you assign an appointment limit to Students. In the System-Appointments-Rate of Frequency Checks setting, Administrators are able to select time frames that range from per day to per year.

**Fig. 26- A**

**Fig. 26-B**

<table>
<thead>
<tr>
<th>System - Appointments - Future Signup Days Allowed for Administrators:</th>
<th>30</th>
<th>[Edit]</th>
</tr>
</thead>
<tbody>
<tr>
<td>System - Appointments - Future Signup Days Allowed For Students:</td>
<td>14</td>
<td>[Edit]</td>
</tr>
<tr>
<td>System - Appointments - No of Days Results:</td>
<td>7</td>
<td>[Edit]</td>
</tr>
<tr>
<td>System - Appointments - Rate of Frequency Checks: Select the rate of frequency to be applied when determining ability to book new appointment based on Student’s Max No Appointments.</td>
<td></td>
<td>[Update] [Cancel]</td>
</tr>
<tr>
<td>System - Base URL: <a href="https://test.myinterface.com/test1">https://test.myinterface.com/test1</a></td>
<td>[Edit]</td>
<td></td>
</tr>
<tr>
<td>System - Calendar - Future Days To Sync:</td>
<td>150</td>
<td>[Edit]</td>
</tr>
<tr>
<td>System - Calendar - Past Days To Sync:</td>
<td>30</td>
<td>[Edit]</td>
</tr>
</tbody>
</table>
New Feature

Major Code Assignment

Major codes uploaded into the CSO system can now match on either the Major code’s long name or short name. The major field is unique for many offices in that there is a display name familiar to users (i.e. Accounting) but a backend, abbreviated name common in campus databases and among Administrators (i.e. ACCT). The new Match on Major Short Name feature allows Administrators to utilize both the code’s short name and long names so that the system can display a code long name to users but with imports, match on the code’s short name.

How it works:

In order to utilize a Major code’s short and long name, you will need to make sure that the Majors in your system have both a short and long name assigned in Tools>Setup>Codes. Once a Major is affiliated with both a code short and long name, the system is able to use one as a reference for matching for imports and the other for importing as a display to users (Fig. 27-A).
Setup: Assigning Major Code Short Names

In order to upload major data with the Major Short Name, you must first make sure that your major codes have a Major Short Name assigned to each code. To add a Short Name to your Major codes, follow the instructions outline below.

1. Head to Tools>Setup>Codes
2. In the Code Type drop down menu, select Major (Fig.27-A)
3. Select a Major in the Values box and assign the appropriate Code Short Name by typing in the Code Short Name EXACTLY as it will appear in your import file. The Code Short Name should match in case, spacing, dashed, etc.
4. After adding in your Code Short Name, click the Update Selected Code button
5. Repeat steps 3-4 for all remaining Major Values and click Refresh to finalize your changes

Fig. 27-A
Setup: Import Project to Match on Code Short Name

After your Major values have an assigned **Code Short Name** and **Code Long Name**, you are ready to setup your upload project to match on **Code Short Name**. Instructions on how to setup your upload project are below.

1. Head to **Tools> Upload> Student Custom Upload**
2. Complete the specifications for your upload project as you normally would; however, in the new **Match Major** field, select **Code Short Name**. If you need assistance in setting up your upload project, contact our CSO support team (Fig. 28-A)
3. Upload your import file. Map your **Code Short Name** to the column in your file with the **Code Short Name** values and Major your **Code Long Name** to the column in your file with the Code Long Name values.
4. Click **Save Project**

---

**New Feature**

**CPP Assessment Stats**

Offices with CPP integration can now access general information regarding their assessments right from within their CSO system. As an Administrator, navigate to **Tools>Reports>Assessment Stats**. This new screen shows Administrators the number of assessments taken and the number of assessments that remain. From this page, Administrators are also able to see which Students have taken their assessments and if the Student’s assessment is complete, the Administrator is able to view the Student’s assessment report.
System Information:
- this feature is on by default for systems with CPP integration
- this feature is not customizable per college in Enterprise Systems Setup

New Feature
CSO Connect Emails

Two new system emails have been added so that Administrators approving CSO Connect Employers and job postings can more easily request more information from the poster. As new Employers and Job postings are pushed down to your system, you are able to review and approve the records you want posted in your site. Before accepting a position you are able to adjust the record’s status to one that is also tied to the two CSO Connect emails. Once the record is saved with the triggering status, the system will send the CSO Connect poster requesting that they provide more details on the Contact or Job record submitted to your site.

System Information:
- this feature is on by default
- this feature is available to all product levels with the exception of Basic and Job Board Systems
- this feature is not customizable per college in Enterprise Systems

How It Works

The two emails added to enhance the Connect approval process are: CONTACT- More Information Required For Contact and CONTACT- More Information Required for Job Posting. Like all system event emails, these emails can be customized in Tools>Setup>Templates. In order for these emails to send, you must first create a status to act as a trigger marking the record as needing more attention. Once your “Needs Revision” status is in place, you then need to head to Tools>Setup>Settings to specify which status should be used as a trigger to send the needs revision emails.
Setup: Customizing Connect emails

Like most automatic system emails, the Connect- Request More Information emails are customized through Tools>Setup>Templates. Instructions on how to customize this email are below.

1. Head to Tools>Setup>Templates and locate the CONTACT- More Information Required For Contact email
2. Click the word document icon to the right of the email. Customize the email message in the word document and save those changes. Proceed back to your CSO system and click Edit and then Upload to upload your revised word document.
3. After uploading your revised email template, click Refresh at the top of your screen
4. Repeat Steps 1-3 for the CONTACT- More Information Required for Job Posting email

Setup: Creating Custom Job/Contact Statuses

The Connect emails require for a custom job/contact status so that Administrators can identify which records are waiting on further details and also trigger the connect emails. To create new Job/Contact Statuses, follow the instructions outlined below.

1. Head to Tools>Setup>Codes
2. Select Employer Contact Status as your Code Type
3. Type your status name in the Code Display Text field and select what status should be affiliated with the code in the Code Status field
4. Click Add as New Code
5. Repeat steps 2-4 for Job Status as the Code Type
6. Click Refresh at the top of the screen

Setup: Enable Settings for Needs Revision Request

The final step to enable the Needs Revision request for Connect records is to enable the system settings outlined below.

1. Head to Tools>Setup>Settings
2. Click Edit towards the right of System- Status Change- Contact Needs More Info
3. Select the status you’ve set as trigger status for Contacts and click Update
5. Click Refresh at the top of the page