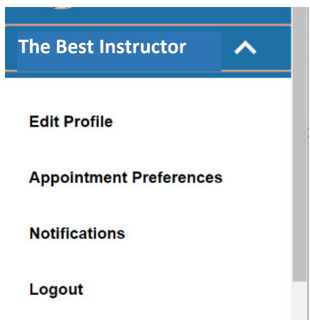
ROOSUCCESS – HOW TO SET UP APPOINTMENT TIMES

Link to RooSuccess

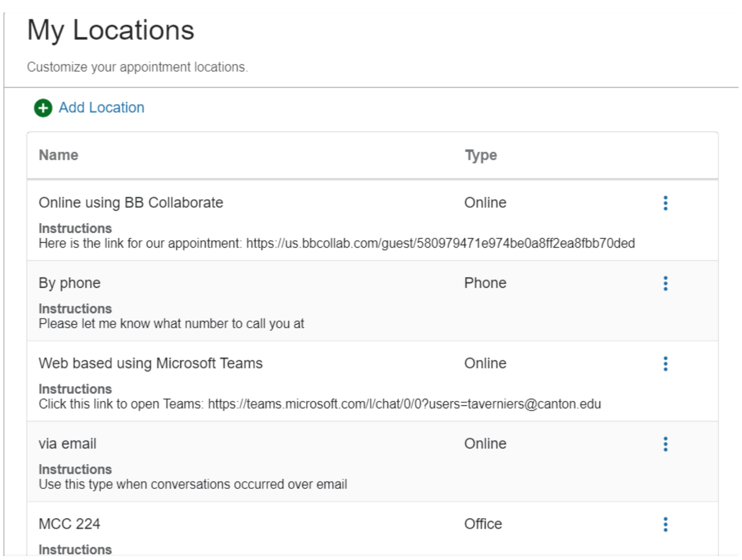
Jump to “Sync RooSuccess and Outlook”

1) The default page when you first log in will ask you to set up some office hours. **This will work, but there is some other setup that will make this function much more efficiently for you.** We are going to skip past this page and use the menu in the top left corner.

2) Instead, click on the “hamburger” menu, then the arrow next to your name to find a drop-down menu:



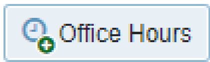
3) Click on the **“Appointment Preferences” tab**, check or verify the information.
   a. Set your preferred minimum appointment time.
   b. Set the deadline for scheduling an appointment.
   c. Set up all locations where you hold appointments including office, phone and web locations. You can list as many “locations” as needed. Instructions are specific to the location and will be sent to the student once the appointment is made. Include link/phone for how they reach you.



d. If you currently allow other campus personnel to edit your Outlook calendar and schedule appointments for you, add them as Calendar Managers here.

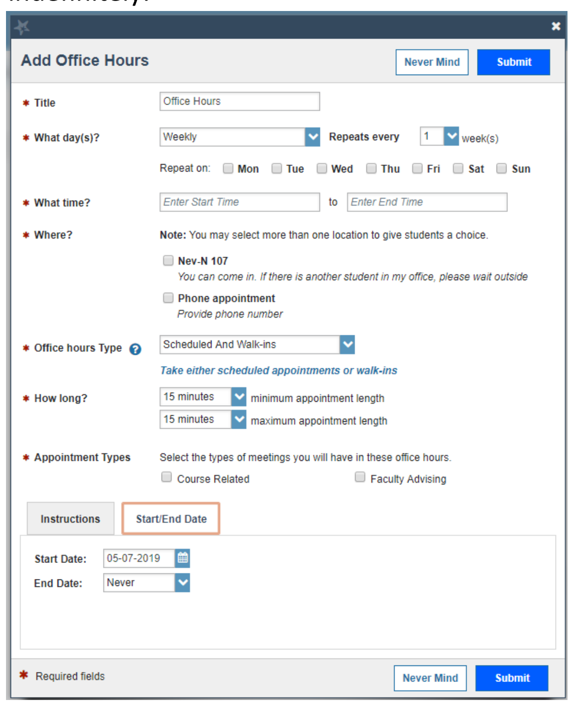
OK, NOW let's set up some office hours:

4) Go back to the hamburger menu, then to **Appointments**. Once in that screen, click on Office Hours

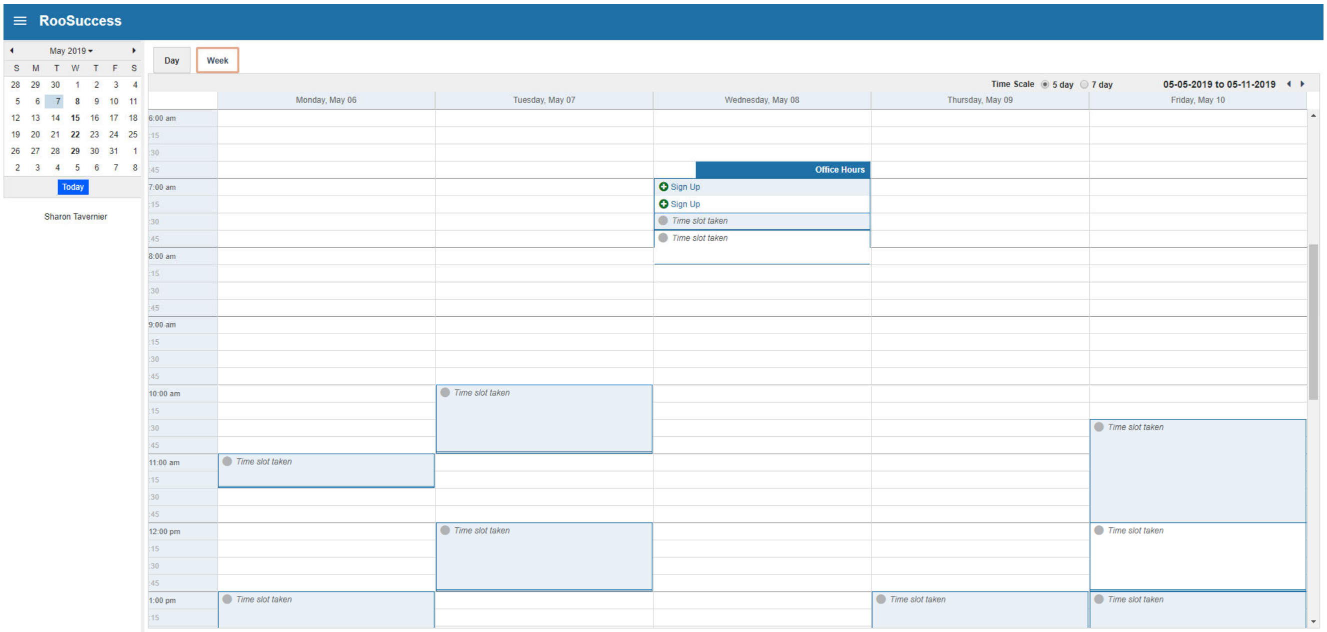


a. Work your way through the list of questions. At the beginning of the semester you might just do your recurring office hours for the whole semester. When the Advising Period is underway, you can add additional hours as you need to. You can indicate where specific office hours will take place or limit them to course specific vs. advising times if you need to. There is a lot of flexibility here if you need it.

If you set up recurring Office Hours, be sure to set the END DATE – typically the end of the current semester, or they will recur indefinitely:

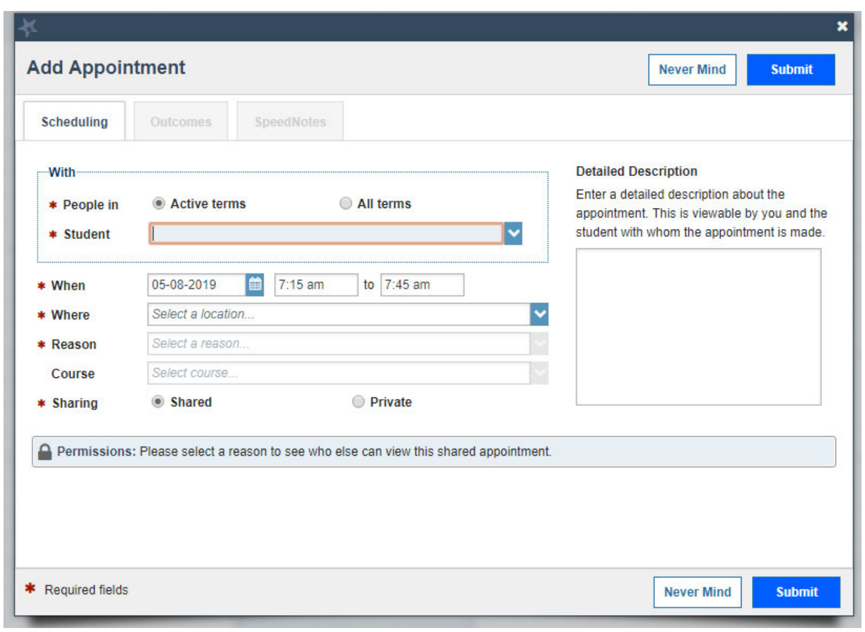


Once you set up your appointment availability, your schedule should show a mix of your available times and your unavailable times:

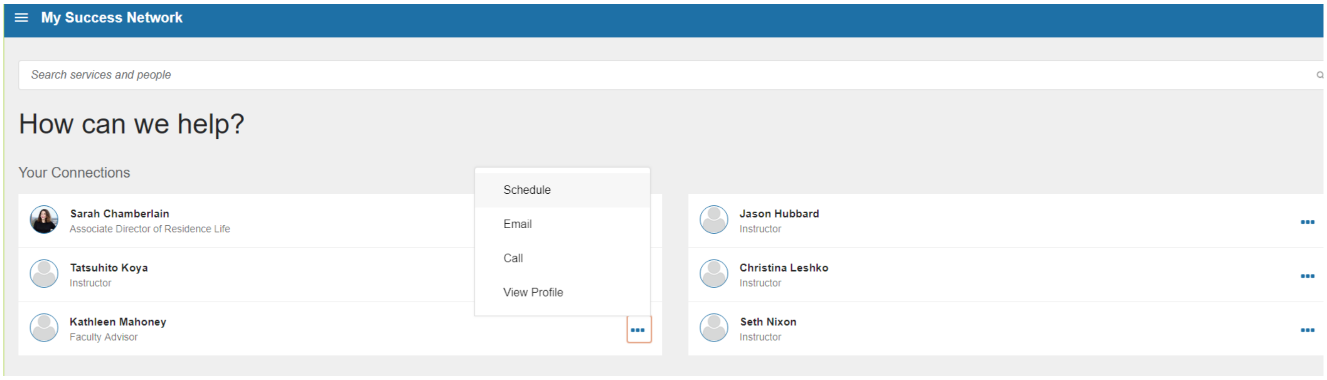


You can click on the Sign up spots to add a student, or students can be directed to add themselves (see below for student view).

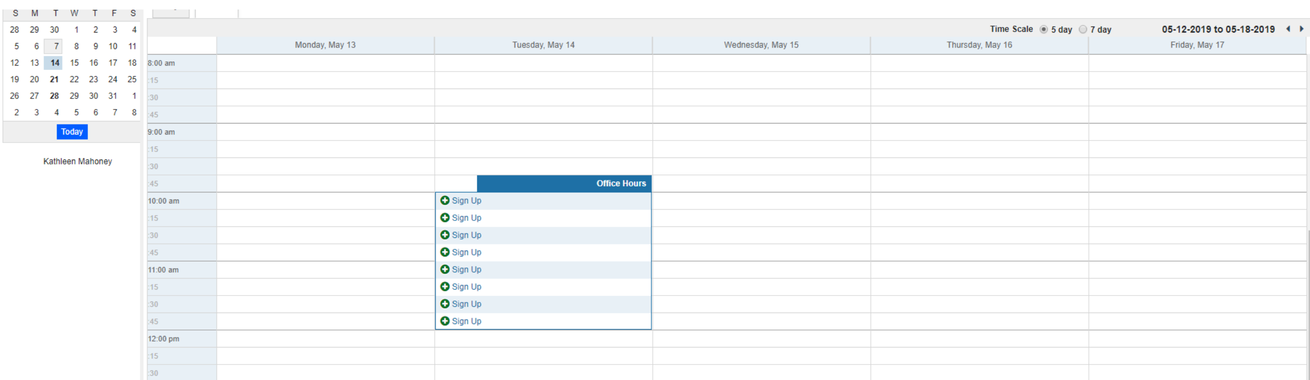
If you click on a "Sign Up" time, you will have to fill out the information on the student and appointment information. You can search for students with first name, last name or student ID number. Once you submit, notification will go to you and to the student. Anything in Detailed Description will be included in the appointment invite.



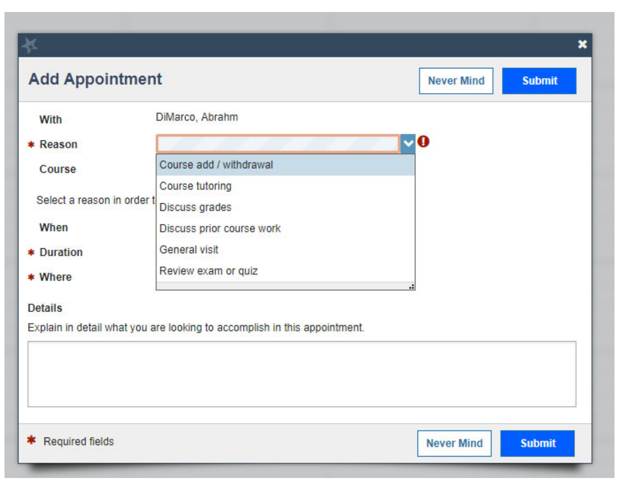
When a student logs into RooSuccess, the first thing they see is their Success Network for this semester. If the people in their Success Network have Office Hours set up, then the student can see them by clicking on the three dots to the right of the name to see "Schedule":



That will take them to a similar looking calendar where they can click on an appointment time:



The student is then prompted to enter the specifics of the appointment within the parameters that you set up.



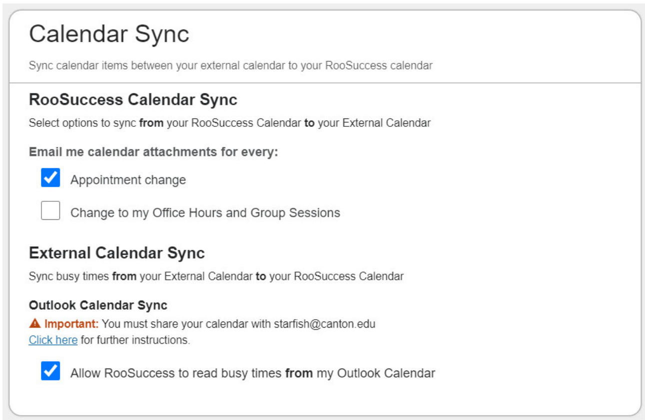
Once they Submit, notification goes to you and to the student of the upcoming appointment.

Calendar “hacks” to try:

- Do not accept the Outlook Calendar invite when setting up Office Hours if you don’t want the times taking up space on your calendar. This will still allow and send individual appointments.

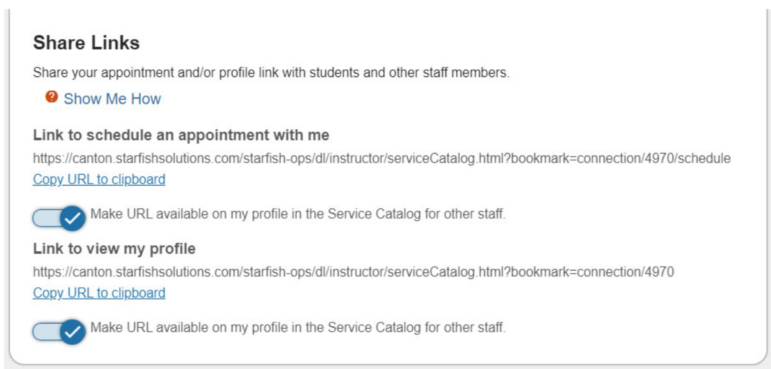
OR

- Set up your Email Notifications to send you changes to appointments but NOT Change to Office Hours/Group Sessions



You can document your conversation with the student during or after the appointment. See [Meeting Outcomes] for details.

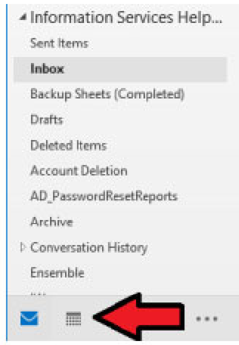
If you go back to edit profile, you can grab direct links to your calendar to include in your emails to your students or in your signature. The yes/no checks involve making your schedule available to other staff.



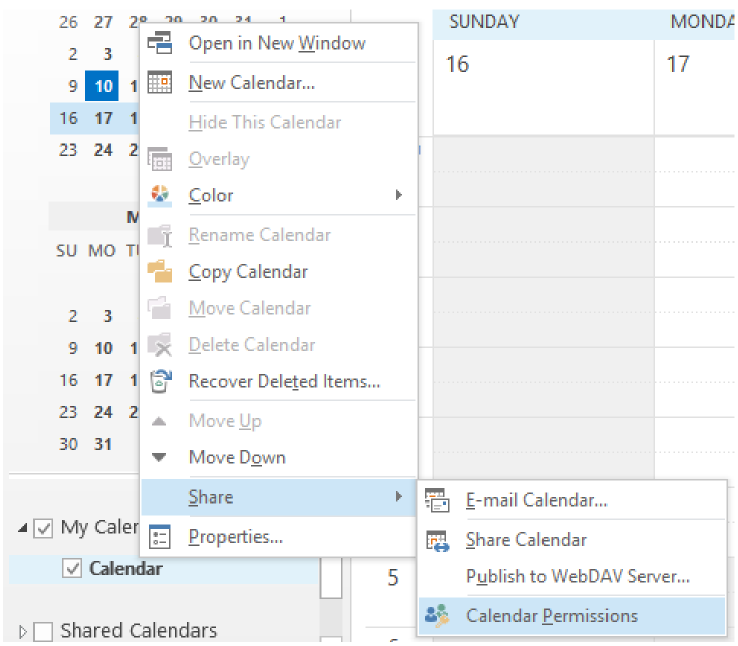
SYNC your RooSuccess and your Outlook Calendars

IF you want to SYNC your Outlook calendar with your RooSuccess calendar, you need to follow a few extra steps. This will pay off!

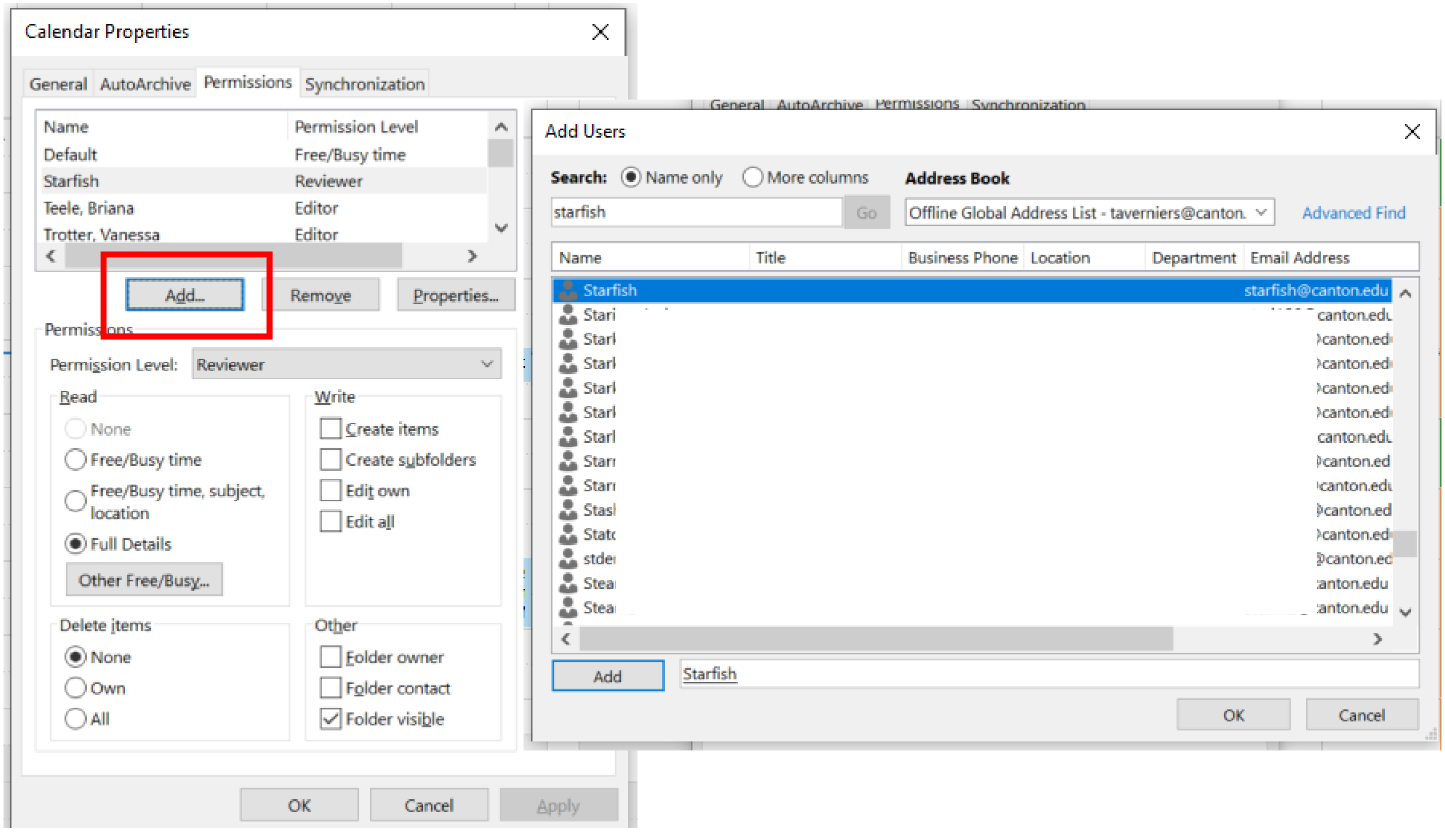
1) Log into your email account using Outlook.
2) Go to the calendar view:



3) Under "My Calendar" , right click on your calendar, then Share then Calendar Permissions:



4) In Calendar Properties, click Add button, in that menu type in "Starfish", select from the menu and click on Add:



5) You can select Reviewer for the Permission Level and then click Apply.

Once Starfish shows up under your “Shared Calendars”, go back to RooSuccess, go to Email Notifications under your profile and click the box that says “Read busy times from my external Exchange calendar”