How to get started with APLUS
# Table of Contents

Overview......................................................................................................................... 4
  What is it? ......................................................................................................................... 4
  What do I see after I log in? ......................................................................................... 4
Title Bar ............................................................................................................................. 5
Student Home Screen ....................................................................................................... 6
  Overview ......................................................................................................................... 6
  Population ....................................................................................................................... 7
  Filters ............................................................................................................................... 7
  Students .......................................................................................................................... 8
Export Student Lists .......................................................................................................... 9
  Reminders List ............................................................................................................... 9
  Bulk Operations ............................................................................................................ 9
Student Profile .................................................................................................................. 12
  General Student Information ....................................................................................... 12
  Student Profile tabs .................................................................................................... 13
Contact Overview ............................................................................................................ 15
Log a Contact ................................................................................................................... 17
  Ways you can log contacts ......................................................................................... 17
  Types of Contacts ....................................................................................................... 17
  Full-service walk-ins & "No appointments in past year" alerts/warnings ..................... 17
  Who Initiated the Contact? ......................................................................................... 17
Log Contact Form ............................................................................................................. 18
Contact Corrections .......................................................................................................... 19
Gmail ................................................................................................................................ 20
  Overview ....................................................................................................................... 20
  Saving Incoming E-mails ............................................................................................ 20
  Outgoing E-mails ........................................................................................................ 21
Calendar .............................................................................................................................. 22
  Book Appointments Yourself .................................................................................... 22
  Setup Web Scheduling ............................................................................................... 22
  Front Desk ................................................................................................................... 23
  Check-in View ............................................................................................................. 23
  Scheduling Appointments/Walk-ins/Appointment Slots/Events .................................. 23
Google Authorization .................................................................................................... 25
Reports ............................................................................................................................... 26
Preferences ....................................................................................................................... 27
  General ......................................................................................................................... 27

Version: 0.92 July 21, 2015
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-mail</td>
<td>27</td>
</tr>
<tr>
<td>Calendar</td>
<td>27</td>
</tr>
<tr>
<td>Web Scheduling</td>
<td>29</td>
</tr>
<tr>
<td>Custom Alerts</td>
<td>29</td>
</tr>
<tr>
<td>Kiosk</td>
<td>29</td>
</tr>
<tr>
<td>Permissions</td>
<td>29</td>
</tr>
<tr>
<td>Draft Contacts</td>
<td>30</td>
</tr>
<tr>
<td>Chat</td>
<td>31</td>
</tr>
<tr>
<td>Chat Menu</td>
<td>31</td>
</tr>
<tr>
<td>Administration</td>
<td>32</td>
</tr>
<tr>
<td>Information</td>
<td>32</td>
</tr>
<tr>
<td>Staff</td>
<td>32</td>
</tr>
<tr>
<td>Students</td>
<td>32</td>
</tr>
<tr>
<td>Alerts</td>
<td>32</td>
</tr>
<tr>
<td>E-mail Templates</td>
<td>32</td>
</tr>
<tr>
<td>Subunits</td>
<td>32</td>
</tr>
<tr>
<td>Training</td>
<td>32</td>
</tr>
<tr>
<td>E-mail Templates</td>
<td>33</td>
</tr>
<tr>
<td>Create Templates</td>
<td>33</td>
</tr>
<tr>
<td>Preview Template</td>
<td>33</td>
</tr>
<tr>
<td>Queue</td>
<td>34</td>
</tr>
<tr>
<td>Help</td>
<td>36</td>
</tr>
<tr>
<td>Definitions</td>
<td>37</td>
</tr>
</tbody>
</table>
Overview

What is it?
APPLUS is a near real-time web-based application used by student services professionals, such as academic advisers, to monitor the progress of their assigned students. Every 10 minutes, APLUS looks for potentially problematic student behavior, such as dropping below 13 credits or not enrolling for the following semester after a student’s registration queue time has passed, and notifies the responsible staff/faculty should anything be found. These staff/faculty can then log into the system, review a student’s records, follow up, record notes, and set a reminder to contact the student again should he/she fail to follow-up on recommended next steps.

What do I see after I log in?
As soon as you log in you are brought to the “Student Home” screen. Every page you visit in APLUS will have the top tool bar. Not every page will have a side bar of options/filters to select.

![Student Home Screen](image)

- **Population**
  - **Assigned to:** College of Liberal Arts
  - **Term:** Summer 2015

- **Filters**
  - There are currently no filters set.

- **Alerts & Warnings**
  - 4 Alerts
  - 15 Warnings

- **Enrolled**
  - 1,177 students

- **Exceptions**
  - 78 students

- **Showing:** 1-25
- **Of 181 students:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Student ID</th>
<th>Major(s)</th>
<th>Term Credits</th>
<th>Cumul Credits</th>
<th>Cumul GPA</th>
<th>Issued</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAMS, Brenda</td>
<td>#000757612</td>
<td>Communication Studies B A</td>
<td>4.0</td>
<td>87.0</td>
<td>3.923</td>
<td>May 06, 2015</td>
</tr>
<tr>
<td>ADAMS, Cathy</td>
<td>#000543010</td>
<td>Economics B A</td>
<td>3.0</td>
<td>116.6</td>
<td>2.818</td>
<td>May 06, 2015</td>
</tr>
<tr>
<td>ADAMS, Constance</td>
<td>#000307000</td>
<td>Multiple Plans</td>
<td>0.0</td>
<td>50.0</td>
<td>2.211</td>
<td>Mar 24, 2015</td>
</tr>
<tr>
<td>ALEXANDER, Christopher</td>
<td>#000508031</td>
<td>Multiple Plans</td>
<td>3.0</td>
<td>127.0</td>
<td>3.484</td>
<td>Mar 24, 2015</td>
</tr>
<tr>
<td>ALEXANDER, Sharon</td>
<td>#000865137</td>
<td>Undeclared</td>
<td>3.0</td>
<td>39.0</td>
<td>2.575</td>
<td>Apr 27, 2015</td>
</tr>
<tr>
<td>ALLEN, Andrew</td>
<td>#000121133</td>
<td>Psychology B A</td>
<td>3.0</td>
<td>95.0</td>
<td>3.208</td>
<td>May 14, 2015</td>
</tr>
<tr>
<td>ALLEN, Matty</td>
<td>#000572726</td>
<td>Psychology B A</td>
<td>3.0</td>
<td>111.0</td>
<td>2.725</td>
<td>Dec 18, 2014</td>
</tr>
<tr>
<td>ALVAREZ, Francis</td>
<td>#000656165</td>
<td>Psychology B S</td>
<td>3.0</td>
<td>88.0</td>
<td>1.754</td>
<td>Dec 18, 2014</td>
</tr>
<tr>
<td>ANDERSON, Catherine</td>
<td>#010221533</td>
<td>Undeclared (Biology)</td>
<td>3.0</td>
<td>27.0</td>
<td>0.000</td>
<td>Apr 08, 2015</td>
</tr>
<tr>
<td>BAILEY, Nicole</td>
<td>#000945366</td>
<td>Psychology B A</td>
<td>3.0</td>
<td>105.0</td>
<td>2.625</td>
<td>Dec 18, 2014</td>
</tr>
<tr>
<td>BAKER, Beatrice</td>
<td>#000375958</td>
<td>Lower Division (Statistics)</td>
<td>3.0</td>
<td>62.0</td>
<td>2.430</td>
<td>Apr 23, 2015</td>
</tr>
<tr>
<td>BAKER, Kathryn</td>
<td>#000618787</td>
<td>Communication Studies B A</td>
<td>4.0</td>
<td>97.0</td>
<td>2.820</td>
<td>Apr 01, 2015</td>
</tr>
<tr>
<td>BELL, Annette</td>
<td>#000023492</td>
<td>Ger, Scandinavian, Dutch B A (German)</td>
<td>3.0</td>
<td>63.0</td>
<td>2.956</td>
<td>Sep 03, 2014</td>
</tr>
<tr>
<td>BELL, Jamie</td>
<td>#000112031</td>
<td>Psychology B A</td>
<td>10.0</td>
<td>56.0</td>
<td>3.033</td>
<td>Dec 18, 2014</td>
</tr>
<tr>
<td>BELL, Wayne</td>
<td>#000457163</td>
<td>Multiple Plans</td>
<td>3.0</td>
<td>69.0</td>
<td>3.047</td>
<td>Apr 07, 2015</td>
</tr>
<tr>
<td>BENSON, Terence</td>
<td>#000511409</td>
<td>Undeclared (Economics)</td>
<td>3.0</td>
<td>13.0</td>
<td>2.537</td>
<td>Apr 10, 2015</td>
</tr>
<tr>
<td>BLACKWELL, Maria</td>
<td>#000369777</td>
<td>Biology, Society, &amp; Envirn BA</td>
<td>4.0</td>
<td>93.0</td>
<td>3.899</td>
<td>Apr 22, 2015</td>
</tr>
</tbody>
</table>
Title bar icons in order from left to right:

- Students Home
- Appointments
- Gmail
- Calendar
- Reports
- Preferences
- Draft Contacts
- Chat
- Administration
- Help
- Queue

Search for student by e-mail, student id, or name

*Depending on your role in APLUS, some icons may not be available*
Overview
This is the “home page” of APLUS for most users - the first page you see after logging into APLUS. Here you can find useful information about how the students you work with are progressing, as well as any alerts/warnings you may want to follow up on.

It can be broken down into 5 primary areas:

- Population & Filters
- Students
- Export student lists
- Reminders list
- Bulk Operations
Population
This is how you may change the different student population views. Depending on your role you may select between different units, staff/faculty, or majors along with a term. The term always defaults to the current term while the student population default depends on your unit affiliation(s), roles, and/or preferences. Future terms may also be selected.

In order to change the population, make the appropriate selections on Student Population and Term then click “Change Population” button. The screen will refresh and may take a moment to reload.

Filters
Filters are a great way to work with subsets of the student population(s) you work with, especially for those with large caseloads. There are a wide range of filters, and you may add as many as you want in order to narrow down the student population. Additionally, you have the option to save the filter set with a custom name to use in the future. These saved filters will then appear under “Saved Filters” in the filter selection drop-down menu.

Adding and Applying Filters
After adding a filter you must click the “Apply” button before adding another one. When you click the “Apply” button it takes a moment for the page to refresh with the filtered results.

1. Click the “Add” button
2. Choose filter and options of how it is filtered (example below has equality and major)
3. Click the “Apply” button
4. If you need to edit or delete a filter then click the pencil icon or “X” button next to the filter description, respectively.

Saving Filters
Here is where you can save the filter set you have created and give it a custom name for use later. After you have saved it, you will see the new filter at the top under the “Saved Filters” section. When you click the “Save” button you may see a link that says “save as custom alert.” Please refer to the “Custom Alerts” section to learn more about creating and working with custom alerts.
Students
The list of students in this view is based on the different filters and student population data that you have selected. This section puts the students into four categories; Alerts, Warnings, Enrolled, and Exceptions. Alerts and warnings are broken down to 2 subcategories alerts/warnings and the reminders.

This shows data that is very useful for a brief overview of the students in the list. The columns include student's name, student ID, Major(s), term credits, cumulative credits, cumulative GPA, and the issue date of the latest notification. The term credits and cumulative GPA columns are color coded base off different factors. For example, GPA highlighted in yellow and red based off GPA below 2.5 and 2.0 respectively.

Another great feature is to hover over student name to see the current notifications, hover of “Multiple Plans” major to see the majors, and the ability to sort each column.

If you have students assigned to you and e-mail notifications enabled then you will receive a list of students that have new or reissued alerts, warnings, or reminders each morning. You will not receive an e-mail if there are no newly-generated/reissued alerts, warnings, or reminders, even if you have e-mail notifications enabled.

Alerts
Students with alerts need to have some action taken quickly, usually in the form of a follow-up contact with the student. Students with alerts will remain in this list until either the alert no longer applies or some action has been taken to address the alert. Alert criteria and expected follow-up actions can and do vary from unit to unit. Alerts themselves are circumstances that have a negative impact on a student’s academic record, finances, or other areas, such as dropping all of one’s courses. The default alerts can be customized per unit to meet local needs and processes.

Warnings
Students with warnings will need some sort of action soon, but typically not before those with alerts. Like alerts, students with warnings will remain in the list until either the warning no longer applies or some action has been taken to address the warning. An example of a warning is a student who is enrolled in less than 13 credits without a temporary or permanent 13 credit exception. Also like alerts, warning criteria can be customized to meet local needs and processes.

Alerts/Warnings Reminders
A reminder is where a staff/faculty member has taken action, usually after some sort of contact with the student, regarding a specific alert/warning and has set a time for APLUS to remind them to see how the student has been progressing and/or follow-up. On the date of the reminder, the relevant alert/warning will be reissued automatically. If the student no longer meets the conditions which generated the alert/warning in the first place, the alert/warning will not be reissued.

Exceptions
These are students that are found to have one or more exceptions to alerts and warnings criteria. Even if your college/unit does not use alerts/warnings, you may find students in this category since they often indicate those with special circumstances. For example, graduating from the University is an exception for a student who is not enrolled for the following semester, and is considered a special circumstance in general. Once the exception is applied it will stay on until the exception is no longer true.
Enrolled / Active
This is the list of all other students that do not fit under any other category. In other words, these students do not have any current pending alerts or warning and they do not have any exceptions at this time. The name of this tab depends on whether a term is currently in progress (Enrolled) or we are between terms (Active).

Export Student Lists
There are many options available to you when exporting lists of students to an Excel document. You can choose the tabs (i.e., Alerts, Warnings, Active/Enrolled, and Exceptions) to export and which fields you would like as part of your exported Excel file. Please note, large lists and lists incorporating fields like contact notes, notes, and PeopleSoft Comments may take a while to download.

Reminders List
You can find the “Reminders list” button on the left side of the “Student Home” under the “Export” button. Here you will find a list of reminders for a given student population and reminder type. There are four types of reminders:

- Alerts
- Warnings
- Contact
- Adhoc

The alert and warning reminders are shown both here and on their own sub tab on the “Student home” screen, as discussed above in “Alerts/Warnings Reminders” under the “3.5 Students” section.

Contact reminders are very similar to alert/warning reminders but there is no alert/warning associated with the contact. Just like alert/warning reminders, contact reminders are created by choosing a ‘remind me’ date when creating or editing a contact. This type of reminder is good for a follow-up to make sure what was discussed during the contact has been implemented. For example, if a contact has been created about a student wanting to study abroad then you may setup a reminder to make sure the discussed tasks have been completed by a specific date, such as the student applying for a passport.

Adhoc reminders are meant to fill the gaps not already covered by alert, warning, and contact reminders. Adhoc reminders can be about anything you want to be reminded about for a given student, and can be set for any date between now and 4 years in the future. To read more about how to create adhoc reminders go to the “Notes tab” under the “4.2 Student Profile tabs” section.

Bulk Operations
This interface is available to coordinators only. Here is where you can assign or remove tags in bulk, and log contacts in bulk. To use this interface, you first click on the choose file button and select a csv file containing the bulk assignment information. After you are done selecting the file, the interface will automatically parse through the entire file and verify it to make sure all the entries are valid and correctly formatted. The information on how to format your bulk upload file is available on the right hand side on the interface. After the file is processed the interface will either display errors in the file if any, or display a success message with summary information of the file. Once the file has been successfully verified (Fig. 2) and when you are ready to perform the upload, hit the Submit button. After you hit the “submit” button and the tags are assigned, you will see a success message (Fig 3.) again with a summary of the operation.
Logging bulk tags:

There are two methods of bulk assigning/removing tags. The first option is to select a CSV file containing a list of EMPLIDs and a tag you want assigned/removed using the "Choose a tag" button. The second option is to select a CSV file including the codes for the tag(s) you want assigned to or removed from each EMPLID using the TAG_LIST column.

To bulk assign/remove tags, you must format your CSV file using the fields below.

**Required:**
- **EMPLID** (student ID number) or **INTERNET_ID** (aka X.500; the first part of a student’s UMN email address)

**Optional:**
- **TAG_LIST**: The code(s) for one or more tags you want to assign to a given student; you can assign more than one tag to a student by separating each code by a semicolon (e.g., “si_focus; 3877; si_discipline”)
- **EFFDT**: The date a tag or set of tags became effective for a given student; default is today.

Expected date format is “YYYY-MM-DD”.

- **EFFUNDT**: The effective end date for the tag (if applicable).

Expected date format is “YYYY-MM-DD”.

---

Fig. 1

**Bulk Tags Assignment/Removal**

CSV File: Choose File  No file chosen
Tag: Choose a tag
Action: Add Tag  Remove Tag

Assign tags  Cancel

---

Fig. 2

**Bulk Tags Assignment/Removal**

CSV File: strengths_010915.csv
Tag: Choose a tag
Action: Add Tag  Remove Tag

Submit  Cancel

---

Fig. 3

**Bulk Tags Assignment/Removal**

CSV File: Choose File  No file chosen
Tag: Choose a tag
Action: Add Tag  Remove Tag

Assign tags  Cancel

---
TERM: The term code pertaining to the tag (if applicable). The term code is a 4 digit number, where the first 3 digits represent the year after subtracting 1900 from it, and the last digit represents the semester. The semesters are coded as follows: Spring - 3, Summer – 5, Fall – 9. Example: Spring 2011 – 1113.

TEXTAREA: A text block associated with the tag (if applicable).

Logging bulk contacts:
Select a CSV file containing EMPLIDs and contact details for the particular emplid.
To bulk assign contacts, you must format your CSV file using the fields listed below.

Required:

EMPLID (student ID number) or INTERNET_ID (aka X.500; the first part of a student’s UMN email address)

CONTACT_TYPE: The type of contact

CONTACT_STATUS: The status of the contact.

CONTACT_DATE: The date the contact occurred.

Expected date/time format is "YYYY-MM-DD HH:mm:ss (24hr format)".

UNIT_ID: The code for the unit this contact is associated with.

Optional:

CONTACT_TAG_IDS / PURPOSE_TAGS: The code(s) for one or more purpose tags you want to assign to a given contact; you can assign more than one purpose tag to a contact by separating each code by a semicolon (e.g., "tag_ref1; tag_ref2")

TAG_LIST: The code(s) for one or more tags you want to assign to a given student; you can assign more than one tag to a student by separating each code by a semicolon (e.g., "si_focus; 3877; si_discipline")

EFFDT: The date a tag or set of tags became effective for a given student; default is today.

Expected date format is “YYYY-MM-DD”.

EFFUNTIL: The effective end date for the tag (if applicable).

Expected date format is “YYYY-MM-DD”.

CONTACT_STAFF: emplid (ID number) or internet id (aka X.500; the first part of a staff’s UMN email address)

CONTACT_DURATION: The duration of the contact.

Expected format is a time in hh.mm.ss

TERM: The term code pertaining to the tag (if applicable). The term code is a 4 digit number, where the first 3 digits represent the year after subtracting 1900 from it, and the last digit represents the semester. The semesters are coded as follows: Spring - 3, Summer – 5, Fall – 9. Example: Spring 2011 – 1113.

TEXTAREA: A text block associated with the tag (if applicable).
Student Profile

The Student Profile gives you detailed information about an individual student, divided into 5 tabs: Overview, Characteristics, Academics, Contacts, and Notes. Usually, you can get to a student profile by clicking their name on any screen, such as the “Student Home.”

General Student Information
On the top left corner of the student profile you will see some basic information about the student. Here is where you can find the student's emplid, e-mail address, photo, and telephone number.

There are also 3 buttons under the student’s photo and telephone number, allowing you to quickly set up an appointment, email the student, or log some other contact with the student.

Please note: you may be missing the “E-mail” button and/or “Appointment” button because Gmail and Google calendar must first be authorized, respectively, and must be authorized each time you log in to APLUS. Please see “Google Authorization” for more details.

Student Profile tabs

Overview tab:

This area provides general information about a student’s record, including current registration, advisers, appointments, academic plans, credit load and GPA.

Characteristic tab:

There are two sub-tabs “Current” and “Historical”. The “Current” tab will show all information that currently apply to the student while the “Historical” tab show all information that is no longer current.

The “Characteristics” tab gives a detailed list of student’s alerts, warnings, and APLUS tags (on the left) and service indicators and student groups (on the right). You can add or remove tags to the student’s record here as well.

Academics tab:

Shows five types of information:

1. “Courses” tab has a detailed history of the student’s course-taking activity over time, as well as cumulative statistics for each semester/term. It also contains an interactive graph which depicts the student’s academic trends over time. You can view the graph by clicking on the “View Chart” button located on the top right area. Grades are color-coded to help facilitate quick scanning by staff/faculty during brief appointment prep windows. Registration drops can also be seen by clicking the “Show registration drops” button.
2. “Programs” tab lists the student’s current and historical program plan history.
3. “Education Abroad” tab shows a history of study abroad activity.
4. “Itineraries” tab is where create new enrollment itineraries or access previously-saved itineraries. APLUS interfaces with the Chronos schedule optimization engine, allowing you to quickly generate optimal enrollment schedules for a student given a set of customizable optimization criteria, such as those which
satisfy the most unmet Liberal Education requirements and/or minimize the number of days of the week the student must attend class.

5. “Pre-Enrollment” tab shows all the information about the student before enrolling into the university. It has information about the student’s previous institutions, pre-orientations surveys, placement testing scores, test scores for tests like SAT/ACT, orientation dates, and orientation characteristics.

Contacts tab:

The “Contacts” tabs contains a record of contacts with a given student, including e-mail, appointments, phone calls, etc. Depending on your level of access and data security training, you may also see contacts from other colleges/units. Please refer to ‘Contact Overview’ for more details.

Notes tab:

The Notes tab allows you to save notes to a student’s record that need not be connected to any particular contact you’ve had with the student - they are “stand alone” notes, essentially. Notes entered here are saved in the background to PeopleSoft in the same place as the “Comments” section for contacts. You might use this section to save a note about a potential scholarship opportunity you found for this student, for example. Notes entered here will also appear in the “Contacts” tab, and the “Comments” section of contacts will appear here as well.

In the “Reminders” sub-tab, you can see a list of reminders set for this student. This is also the location where you can create adhoc reminders to remind you about something to do or check on for this student that isn't related to a contact. To create an adhoc tag click the “Add a reminder” button then enter in the details of “Reminder Title”, “Reminder Date,” and “Description.”
The Contacts Overview provides a history of contacts the student has had with a large number of University units, including advising, career counseling, and other student support services. Each contact is color coded by contact type (i.e., phone, appointment, etc.) and labeled with the unit recording the contact and the contact date, as well as other metadata like contact purposes and whether or not the contact has been saved to PeopleSoft. Contacts are sorted in reverse chronological order.

The contacts you see in this overview, as well as alerts, warnings, tags, contact purposes associated with this contact, are a function of your role in APLUS, student data security training, and unit/college affiliation(s).

The color coded body of the contact includes the text of the contact. This text only shows the first little bit then you must click the “Read More” button to see the rest. On the upper right corner of the contact body you will see if this note has been saved in PeopleSoft or not. If the contact hasn't been saved to PeopleSoft and you have created the contact then you can click the “Save to PeopleSoft” button to save. Please note, contact notes that are saved in PeopleSoft cannot be altered afterwards.

If you have created a contact then below the body of the contact is an “Add Notes” button and a “Modify Contact” button. Adding notes will add additional notes to the contact. Modify contact is where you can alter the contact details (date, duration, status ...) and tags/alerts/warnings associated with the contact. If the contact notes/comments aren’t saved in PeopleSoft and created by you then you will be able to alter them.
You can use the filters and search to locate a specific contact(s), such as all e-mails that have term “study abroad” in them. The filters can also be used to show contacts of a specific type. By default, the “Bulk e-mails” filter is unselected to avoid overloading the overview with routine email contacts with the student. Contacts can be exported to an Excel file and, using the checkboxes, you can select which fields you would like to include in the exported file.
Log a Contact

Ways you can log contacts
APLUS provide several ways of logging contacts, but the most common are as follows: using APLUS/Gmail integration to send/receive emails (see Gmail), using APLUS/Google Calendar integration to set up scheduled appointments or walk-ins (see Calendar), manually entering all contact information using the “Log a Contact” form (see Log Contact Form), and the new Draft Contacts section (see Draft Contacts).

Types of Contacts
There are multiple types of Contacts but the most common type are Appointment, Walk-in/Drop-in, E-mail, and Phone Call. The other Contacts are:

Appointment – Student meeting with someone for a standard, pre-scheduled appointment With the Google Calendar integration these contact types are easy to create. Most of the time these contact type require to be updated after the contact.

Walk-in - student meeting with someone for a drop-in/walk-in appointment (i.e. wasn't scheduled ahead of time)

Full service walk-in - student meeting with someone, initially as regular walk-in, but ended up meeting longer and discussing broader academic issues that should be counted the same as a typical pre-scheduled advising/counseling appointment

Phone Call: When a student or information about a student is discussed during a phone call.

E-mail: When a student or information about a student is discussed through e-mail. With the Gmail integration these are very easy contacts to save.

Chat/IM: When a student or information about a student is discussed through a chat system.

Letter: When a student or information about a student is discussed through some type of letter sent to a staff/faculty.

Fax: When a student or information about a student is discussed through fax.

Attendance: For kiosk where a student checks in. Typically the student wants to use something in the room.

Intake: This is where students use an intake to create a contact.

Bulk: The e-mails that get sent out from a bulk e-mail service to multiple students/staff/faculty that were saved to APLUS.

Full-service walk-ins & "No appointments in past year" alerts/warnings
When logging a contact in APLUS, you can now specify “Walk-in (Full-Service)” as one of the contact types. The other type is "Walk-in (General)“. We made this distinction in order to address the issue where an adviser would receive an APLUS alert/warning about a student not having been in for an appointment in over a year when, in fact, they were in for a full-service walk-in at some point. From an APLUS point of view, a full-service walk-in is equivalent to a scheduled appointment

Who Initiated the Contact?
The contact direction is very important part of recording a contact. We try to do our best to figure out who initiated the contact happens but when we don’t know we would like you to fill this out. For example, in our Gmail integration we figure that if you e-mail a student and would like to save the contact to APLUS then the direction is from you initiating the contact.

The way to figure this out is who is taking the proactive step in contacting the other. Are you reaching out to the student or is the student reaching out to you?
Log Contact Form

Again, as mentioned above, this form is the most intensive way to log a contact. You will find this in the “Student Profile” under the “Contacts” tab and “Log Contact” sub tab. This is the place where you can log any type of contact with great detail.

The first time you go into the “Log Contact” form it could appear to be overwhelming. Just take it step by step and you'll start to understand that it goes faster than it looks.

1. Select the “Contact Type” and status.
2. Click all “Contact Purpose” tags that are appropriate for this contact.
   a. You should select all tags that apply or have been discussed during this contact.
   b. The “Purpose Tags” provide a quick way of searching, filtering, and understanding the specific purpose of each contact.
3. Choose who initiated the contact (you or the student)
4. If this contact is about specific alerts/warnings then check which ones were addressed and when you would like a follow up alert/warning. If it was not you can still choose a “Remind me” follow up time.
5. Student tags are tags that go with the student and not with the contact.
   a. These are more for tracking the student in general and not for this specific contact.
6. Pick the contact date, time, and duration if applicable (defaults to current date and time)
7. If you are associated with multiple units then select the unit this contact is associated with. Now start writing your comments, notes, and other details about the contact and what was discussed.

There are times where you may advise a student about what to do in a specific situation and this may later cause an alert or warning. When that alert or warning pops up you attach it by modifying this contact. For example, if you advise a student to withdraw from a class and your unit gets alerts about course that were withdrawn then once you get this alert you can associated it with this specific contact.
Contact Corrections

Again, just as there are many ways to log a contact, there are many different ways to correct a contact. The most detailed is located in “Student Profile” under the “Contacts” tab and “Corrections” sub-tab. From here you can select any contact you created to edit. Once selected it will bring you to a similar the “Log Contact Form” but filled out with the specific information. Couple of other ways to correct contact are by using the APLUS Google Calendar or draft contacts.

There are many reasons why you might have to correct a contact. We have listed a few of the common reasons on why and when a contact should be corrected.

Example #1

An appointment was originally scheduled for an hour and it went late because the student wanted to ask more questions. Not only should you correct the length of the appointment and status but also additional notes, comments, and tags about what was discussed.

Example #2

An adviser has an appointment with a student about a class that they are failing in. The adviser advisees the student to drop the class. Once the student drops the class the adviser gets an alert (or warning) about this specific action. The adviser should go in and modify the contact to apply this specific alert-warning. In other words, there may be times where an adviser will advise a student about a specific action that will later cause a future alert or warning.

In general, best practice is to update a contact as it happens or as soon as possible.
Overview
APLUS e-mail is integrated with the university's Gmail. The e-mail interface is very similar to the Gmail interface with couple of added features. Just like Gmail, you can send and receive any of your e-mails from this screen. The APLUS system allows you to be able to save your incoming and outgoing e-mails to the system and PeopleSoft. This is an easy way to record a contact with or about a student.

Saving Incoming E-mails
There are two ways to save your incoming e-mails as listed below.

- **Saving from e-mail list** - Select the e-mail(s) that you want to save then click the “Save to APLUS/PS” button.
- **Saving from individual e-mail** - click the “Save to APLUS/PS” button.

Either way, a pop-up screen with the selected e-mail(s) will appear (in tabs on top if more than one e-mail selected) verifying that you want to save the e-mail. In this pop-up screen you will notice “Associate with” field. This field determines which student this e-mail contact will save to and the field will be automatically populated with the students name if the e-mail was from the students UMN e-mail address. Depending on your role(s), you may see a drop down menu next to the “Save Contact(s) to APLUS” button. This is to select which unit this contact shall be saved to or associated with.

Please note, e-mails do not have to be to or from a student to save the e-mail contact on a student's record. This feature is so if you are discussing...
information about a student and not to the student then it could be saved as a contact for later reference. For example, advisor might get an e-mail from an instructor about how the student is progressing in class.

Outgoing E-mails
There is the extra bonus of being able to save e-mails to APLUS. All you have to do is:

1. Either type the students:
   a. E-mail address in “To” field
   b. Internet id in the “Associate with” field
2. Click the “Save to APLUS” check box
3. Now more APLUS options appear
   a. Unit - if you are associated with multiple units then this field will appear
   b. Templates - if you would like to use one of the predefined e-mail templates
   c. Tags - if you would like to add one or more of the Adhoc tags
   d. A/W/E - Alerts/Warnings/Exceptions that this contact might be associated with
   e. Purpose Tags
   f. Additional notes - notes not sent in e-mail but saved to APLUS (on bottom of screen)
To view the “Getting Started with the Calendar” guide, click here.

There are three main ways to log an appointment.

1. Go to the calendar directly and select the date & time and fill out all the information.
2. Take a little time to setup the web scheduling and allow students to book their own schedules.
3. Let someone else in your office have control to schedule appointments for you.

Book Appointments Yourself
You can access the calendar directly from a student's profile by clicking the “Appointment” button under the student’s picture (assuming you have already authorized Google Calendar this login). If you create the appointment from the student profile then it will automatically fill out all the student information.

The other way you can book appointments or walk-in's are through the “Calendar” button from the title bar. If you schedule appointments from the “Calendar” button then you will be required to fill out the student’s name, X.500 or EMPLID.

Setup Web Scheduling
To view the “Getting Started with Web Scheduling” guide, click here.

You are able to setup custom URLs for students to access and book on your available appointment slots. This makes it easy for a student to go online and book the time that works best for them. There are a whole lot of preferences that come along with this including e-mail notifications that automatically get sent out based off a template you want to use.

These URLs can have great flexibility with the use of filters and intakes to show or hide specific appointment slots. For example, if a student is looking to book an appointment to talk to you they may see you are available only Tuesdays and Thursday but if that student has a specific tag/alert/warning like drop all courses then your schedule may be open all week long or you may have appointment slots that are 2 hours long instead of the typical 30 minutes long. This flexibility allows you to control how your calendar appointments are booked with varying circumstances.

Please view the Web Scheduling section to learn more about the preferences and settings.
Along with setting up public URLs there are ways to make questionnaires (“Intakes”) to figure out what the student is booking their appointments for. Skip to the “Intakes” section to learn more.

**Front Desk**

Front desk view is a view of multiple calendars at the same time. The calendars that you see in the front desk view can be changed in the “Preferences.” You will only have access to the calendars that the other people give you access too (again a setting in the “Preferences”). If you do not have access to the other person’s calendar then their calendar will be grayed out and disabled.

When you have access to other people’s calendars, depending on your access level, you will be able to view, edit, and create events, appointments, and walk-ins.

**Check-in View**

The check-in view is a place to “check-in” students for their appointments / walk-ins. This portion will be in conjunction with the “Queue.”

**Scheduling Appointments/Walk-ins/Appointment Slots/Events**
Scheduling appointments, walk-ins, and events is very similar to the way you would do it on the Google Calendar. You click hold and drag the time and date you would like the contact or event. Once you do this then a screen pops open asking for more details.

You can choose between Appointment, Walk-in, Appointment Slots, and Events. Each tab will have a little different information that will need to be filled out.

If it’s an appointment or walk-in then you will have to specify which student the contact is with. These types of calendar events will automatically record a contact into APLUS.

If it is Appointment Slots then you will have all sorts of settings on what type of slots, duration of slots, repeats, and if available on your web schedule (where students can view your these appointments on your schedule based off the filters you have setup in “Preferences”).

The last type is “Single Event.” Single events are not Contacts and are regular events that you would save to your Google Calendar.
Google Authorization

Some steps apply if APLUS is trying to gain access to your Gmail or calendar. If you would like the full experience of APLUS and the option it has please authorize this.

Few easy steps:

1. When you are prompted by APLUS authorization screen (Gmail seen below) please click the “Authorize” button.
2. You will be redirected to another screen from Google to allow APLUS to have access to the request item.
3. A blue button will be greyed out at first then after 5 (or less) seconds the button will become enabled allowing you to click.
4. Click the “Accept” button.
5. Now you are redirected back to the screen that you requested before.
Reports

There are a variety of reports to choose from. The number of reports that will show up on your list along with the data in the reports will depend on your role. The data on each report will be limited based on your role(s). Each report can be customized by based off filters and/or display options, exported to Excel file, and saved with a custom name to run at a later date.

The two most common reports are “Contacts” and “Contact Totals.” Depending on your role your view for each report can change. For example a “Coordinator” role will be able to see totals for all staff/faculty in the unit while if you have an “Adviser” role you will only see your contact totals.

Depending on the report, there can be multiple filter and display options that can be customized. One of the most important features of the reports is the ability to save your current filters and display options with a custom report name. This provides a quick and easy access to the reports you customize and use the most.
Preferences

There are many preferences and settings that can be altered to your liking. Depending on your role you may see less “Preference” tabs then discussed below.

General
This contains three subtabs:

Overview tab: This area is where you can setup your default login view. You can set up which default list and view you would like to see. Some people may like to see warnings of their whole unit while others may want to set up to see only their students assigned to them and the alerts tab. There is also a setting to show many records per page to display.

Chat tab: In this you can add people and units to your chat list that are not already present. You can also set up sound and window preferences pertaining to the way you want to be alerted.

Notifications tab: In this you can set preferences pertaining to how you or the unit needs to be notified on different type of events. If you are a coordinator you can also check the “Enforce within this unit” checkbox to enforce that particular preference for everyone belonging to that unit.

E-mail
This is the options you have defaulted when you go into your e-mails through APLUS. The top bottom that says Reset Mailbox Order is a way to put everything back to how it is defaulted.

Calendar
There are a lot of options for the calendar. There are four subcategories of preferences.

Defaults
These are all the default options to set when looking at your calendar and creating events/appointments.

Notifications
Depending on how your unit(s) is set up will depend on if you have access to change the e-mail templates. This is where you can automatically send out e-mails based on different actions that have occurred. For example: you can have the system automatically send the student an e-mail upon creation of an appointment. If you are the coordinator you can setup e-mail templates that are automatically used by all staff in your unit by selecting the “Enforce within this unit” check box.

Front Desk
This is the area where you manage the other staff/faculty members calendars you want to see on the front desk calendar mode. This feature is great to have for a front desk person that is creating appointments/walk-ins for another staff/faculty in their unit. In order to create appointments the staff/faculty must grant access to the other person that is looking to create the appointment.
**Access**

If you do the web scheduling, this is the place where you would allow access to APLUS to alter your calendar ("Grant Access" button). Under the "group access" is how the staff/faculty member can grant access to specific people, roles, or units access to their calendar. You can also choose the varying amount of access you want the other staff member to have (Make changes AND manage sharing, Make changes to events, See all event details, or see only free/busy).
Web Scheduling

General
General settings about the web scheduling and how to handle specific scenarios.

Filters
This is how you can set up filters on which students can schedule appointments through your appointment slots. If you choose to use a filter on an appointment slot(s) you must select that in the calendar by editing/creating the specific slots. You can make the filters as specific as needed by creating filter groups and adding multiple filters in each group.

You can require all filter groups or require any of the groups. So if you require all of the groups then all the filters must be meet to show students. On the other hand, you can require any of the groups that means that if any of the groups come up with any results then the students will show. You can choose how you want the filters in each group to behave also. There are four options for the specific group:

Require all of the following attributes
In order for the student to have access they must meet all of the required filters in this group

Require any one of the following attributes
If the student meets any of the following filters then they will have access.

Exclude all of the following attributes
It will exclude the students that have all of these attributes to schedule on these appointments.

Exclude any of the following attributes
This will exclude students that have any of these attributes from scheduling on these appointment slots.

Intake
Intakes are generally used to gather information from a student before allowing them to either schedule an appointment or not. During the intake process, depending on how the answer the questions, can automatically apply purpose and adhoc tags, bring to the available appointments, load another intake, or stop the process.

URLs
This is how you will make a URL for people to see the intakes, schedules, or multiple staff/faculty schedules. You can choose whether this is a public schedule or a private URL (only seen by people who you give URL to). If you like it to an intake process or staff list then you must select which staff schedules to display.

Custom Alerts
APLUS allows for a wide range of custom alerts, warnings, and notifications. This is the best way for student services professionals to use the filtered criteria to create their own alerts and warnings for the students assigned to them. The custom alerts will show up in the specific buckets or holding tanks until the alert is no longer true or dismissed. If e-mail notifications are enabled then the custom alerts will be part of the e-mails.

Kiosk
This is where you would manage your Kiosk and which intake form to use.

Permissions
A coordinator can give specific levels of access to the kiosk and intakes to their staff by either the staff role(s) or by the specific staff members.
This area is to a place for someone to gather all the information that they can about a contact and complete it later. This is a great implementation for front desk staff. If the person taking the information is busy then they don't have to fill out all the information but instead only fill out the information they have and move on to the next student. This is a great way to get a contact started with limited information.
The Chat is part of the internal messaging system that allows staff/faculty to communicate with each other through the APLUS system.

The internal messaging system is a way for APLUS to send out notifications along with staff/faculty to communicate among each other.

When you receive a message it will appear at the bottom right corner of the web browser. Messages automatically pop open unless your status is set to “Busy” in which case they will appear in a minimized view.

**Chat Menu**

When you click the “Chat” icon on the title bar, you can:

- Change your Status
- See a list of staff in your unit(s) and their color coded status.
- Click on the staff/faculty to start a conversation.

A staff/faculty member will automatically become “Away” after 10 minutes of inactivity.
Administration

This area is for the coordinator role to manage the aspects of their unit. There are all sorts of options for a coordinator to look at and change for the unit. The six main areas are information, staff, students, alerts, e-mail templates, subunits, and training.

**Information**
General information about the unit including address, web address, and phone. There are also options whether to force the notes and contacts to PeopleSoft and whether to turn on web scheduling or not.

**Staff**
This shows all the staff members that are associated with this unit and all the subunits. This is where you can add, edit, suspend, and delete staff from a unit. If you click the staffs name then it will bring you to a general information about that staff member including the training and unit(s) that he/she is part of. If you click the unit it will bring you to the unit's page.

To add a staff member to this group, type the staff member's X.500 or emplid, select their role, and click "Add staff member" in the form below. To change a staff member's role, click the edit link next the staff member's name, select their new role, and click "Edit staff" in the form below. To remove a staff member, click on the remove link next to the staff member's name.

**Students**
This will show the current roster of students that are associated with this unit. You can click the rosters to see which rosters we are pulling from.

**Alerts**
This shows all the alerts, warnings, and notifications that are associated with the unit.

**E-mail Templates**
This will show all of the different e-mail templates that are global, associated with the unit and its staff members. You can copy, edit, or delete e-mail templates that are associated with the unit. For the global e-mail templates you can only copy or view them.

**Subunits**
This is a list of all the subunits that are listed under this unit. It also gives details on the specific status, whether there are notifications that go out, and the number of staff members. If you click a specific subunit then it will bring you to that unit's page and options.

**Training**
This shows the list of staff and the units they are associated with along with the training that they have. You want to see green “Yes” labels across to have full access. If any of these say “No” then they the staff may not be able to access APLUS or have limited access.
E-mail Templates

There are two places that you can find the “e-mail Templates” page. The most common place for someone to find it is in the “Preferences” under the “e-mail” tab and “Templates” sub-tab. The other place it can be found (for coordinators) is in the “Administration” page under the “e-mail Templates” tab.

Create Templates

This is a place to make template based e-mails. You can use these e-mails for a general starting point or you can set them up to automatically send after specific actions (in preferences).

1. Give the template a name
2. Choose who can use the template
   a. only you
   b. specific unit
3. Choose the Alert/Warning/Exception that the template can be used for
4. Start writing your message.

In the message you can add multiple different fields that will auto populate with correlating data. For example, on the right, you see the text in yellow is the text that will auto populate with the correlating data. To insert a field into the message click the field of choice and click insert. The field will insert where you last left off in the message.

Once you are done click the “Save Template” Button.

Preview Template

The best way to see how the template will look is by clicking the “Preview” tab. When you first look at this preview it will put in all the information it can otherwise it will put in demo info.

There is the ability to see how this e-mail will look for a specific student. Just type the student’s id and then click the “Update” button.
Queue

This is an area where students can be dropped into a queue to let the student services professionals know they have someone waiting.
How the queue process works

1. Student
2. Talks to front desk Staff
3. Student is a Check-in with “Queue monitor/manager”
4. Student gets put in Queue (Fig. 1)
5. If the student isn’t already assigned to a staff, the front desk must then assign it to a staff that is available. (Fig. 2)
6. Queue notifies appropriate staff/faculty. (Fig. 3)
7. Staff/faculty accept request or decline.
8. Accept student gets put in “waiting to see” queue
9. Decline student gets put into “Not available” queue
10. Notification gets sent to “Queue monitors/managers”
11. “Queue monitors / managers” tell student the status of staff / faculty: “we will let you know when the staff/faculty is available” or “staff/faculty is unavailable please come back again”
12. Staff/faculty sets student to “available to see” in queue
13. Queue notifies “Queue monitors/managers”
14. “Queue monitors/managers” notifies the student that staff/faculty is ready to see them.
15. Student meets with staff/faculty (Fig. 4, Fig. 5)
This is where you will find all the help documents and information about APLUS.
Definitions

Adhoc Tags - General tags that are saved with the student profile and not associated with a contact.

Alerts - Alerts themselves are circumstances that have a negative impact on a student’s academic record, finances, or other areas, such as dropping all of one’s courses.

Contact - This is a log of what happened during some sort of communication with or about a student regardless if it was initiated by the student or staff/faculty.

Exceptions - There can be exceptions to any alert or warning. Once the exception is applied it will stay on until the exception is no longer true. If a student has an exception to a specific alert/warning then the alert/warning will not be applied to the student until exception no longer applies.

Internal Messaging System – This is a way for APLUS to send out notifications along with staff/faculty to communicate among each other. When you receive a message it will appear at the bottom right corner of the web browser. The primary uses of this is with the Chat, Queue, and APLUS Notifications.

Role - Your access level you have in the APLUS system is defined by your role(s). You are assigned a role for each unit you are part of which means you might have different access levels for each unit. If your unit has subunits your role will be the same for each subunit(s) it has.

Subunit - Subunits are the same thing as a Unit except, they have parent unit(s) above them in a hierarchy tree. Please see definition of Unit to get a full definition of what a Subunit is.

Unit - The group(s) you are part of in APLUS. The group can be defined as broad as a campus or as specific as a department or office. Each unit can be divided into “subunits” and subunits can be broken down to more subunits and so on. Each subunit is a type of unit. Some common ways that a unit is categorized as is campus, colleges, college services, departments, administrative, student services, student committees, and non-degree.

Warnings – Warnings will need some sort of action soon, but typically not before those with alerts. If the student doesn’t deal with these items then it could result in an alert type status.