User Training Manual
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How to Login to Bison Adviser

Enter [https://howarduniv.campus.eab.com](https://howarduniv.campus.eab.com) into your web browser and log in using your Howard University network credentials.

****Note: If you are having trouble with logging in please email [Michael.Bryant@Howard.edu](mailto:Michael.Bryant@Howard.edu) for troubleshooting**
Bison Adviser Home Page

Term Selection

Search Bar

Advisor Home

My Assigned Students for Fall 2018

Your Students

Advisor Reporting

Icon Meanings

Home
Conversations
Calendar
Cases
Campaigns
Reminders
Tutors
Advanced Search
List & Searches
Analytics
Institution Reports
Reporting
Administration
How to Sync your Outlook Calendar

You have the option to sync your Microsoft Outlook Calendar with Bison Adviser, this is vital if you plan to use the appointment feature within the platform.

Syncing your Outlook

1. **First, you need to share your calendar with the Bison Adviser Platform Service Account in Outlook**
   - In Outlook, right click on your Calendar, select Share, and click "Calendar Permissions".
   - b. In the Calendar Properties dialog, click "Add..."
   - c. Find the service account ‘svc_eabcalendar’
d. Set the Permission Level for this account to Editor or Author. The screenshot below is from an IU user and your setup should exactly match this image.

![Calendar Properties](image)

2. **Next, you need to create the connection to Outlook in Bison Adviser.**
   
a. Log in to Bison Adviser. Navigate to your Calendar.
   
b. Click on the Subscriptions tab. Then click Setup Exchange Calendar Integration.
   
![My Calendar](image)

   c. Click Connect with Exchange. Please wait while we connect to your Exchange account and sync your calendars. This may take a few minutes.
   
![Integrate Calendar Information From Exchange](image)
d. Once your account is enabled and synced, you'll see "Enabled" displayed on the screen.

****Note: Events synced are limited to 3 months in the past and 12 months in the future.
Setting up your Availability

Once your calendar integration is set up, it's time to set up Availability.

Setting up availability defines the days and times you will be available to meet with students. It is important to note that locations and services are created by Application Administrators. If you have questions about any locations or services set, please contact them for more information. This article uses Advisor screenshots, but the same process will work for tutors and other staff who need to set availability.

To add availability:

1. Open the Availability tab on the Home page, which may be named differently for your institution.

   **Note:** Availability can also be set up from the Tutor or Advisor Availability Reports on the Reports tab.

2. Open the Actions menu in the Times Available grid and select **Add Time**.
And the Add Availability window opens.

3. Select the days and times when you are available to meet with students.

4. Select whether you will meet with students via appointments or drop-ins during that time. If you select campaigns, you will only be available for campaign-based appointments.

5. Choose the location where you will be available.

6. Select which student services you can provide to students during this availability. **Note:** Leaving this student services field empty means you will appear to be available for all advising student services at the selected location.

7. Click the Save button.

8. Repeat this process until all your availabilities have been defined. You can have as many availabilities as needed.

After you have created availabilities, you might see them highlighted in red or white. If they are red (and says inactive on the right) that is because the date is in the future. Those availability slots will turn white when the calendar date begins and will be active. Students can still schedule time in the future, even though it looks inactive.

There are two other options when adding Times Available.

**Copy Time** - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied and a dialog will open allowing you to make edits or to save your newly created availability.
Delete Time - to delete your time, simply select the time and click the Delete Time button.

Note: Inactive availabilities are highlighted in red in the Times Available grid.

Appointment Constraints

From the Advising Home page, click on the My Availability tab. To define parameters that control your availability with appointments, first click the Edit Appointment Constraints option.

When clicked, these options are available for you to define:

- **Hours in Advance** refers to how many hours, from the current time, a student must wait before they can schedule an appointment. For instance, in the example above, if the current time is 10:00am, the earliest a student would be able to schedule an appointment with you would be 10:00am, the following day. This setting only applies to students making appointments.

- **Default Appointment Length** is the default length of this specific advisor’s appointment. This can be overridden by users with the appointment create permission, except by students, during appointment creation.

- **Require available times for students** means that advisors must have defined Times Available (see section below) before a student can create an appointment with them. If this box is not checked, students are able to schedule with that advisor at any time and day. This box is checked by default. We recommend that advisors use this default during setup.

Click the **Update Constraints** button to save your changes. Then, to hide the Student Appointment Constraints settings box you can simply click on the Hide Constraints link.
Student’s Profile Page

This page will contain an overview of students’ academic history, progress, current course information and many other helpful resources.

When viewing a Student’s Profile, you can use the tabs below their name to access different information.

From this screen you can also “Report on Advising Appointment”, “Issue an Alert”, “Add a Reminder”, and/or message the student (send email).

****Note: There are quick links to Bison Web and Degree Works within this screen.
Scheduling Appointments

Scheduling an Appointment from student’s page

There are two ways to schedule an appointment, one being through the student’s profile page and the other being from your advisor home screen.

To schedule an Advising Appointment via Student Home:

1. Navigate to your Student Home screen.
2. Click the Get Advising button at top right.

3. Select the options for your appointment.
   - **Reason** - The purpose of the appointment.
   - **Location** - The location where you will meet your advisor.
   - **Select an Advisor** - Click on an available advisor to schedule your appointment with them.
   - **Select a Date** - Select the date when you’d like to schedule your appointment.
   - **Comments (Optional)** - Information you’d like to share with the advisor to help them prepare for the appointment.
   - **Reminders** - Email and text message reminders are sent based on your selections. Email reminders are sent the morning of the appointment. Text reminders are sent shortly before the appointment.
Scheduling an Advising Appointment from Adviser Home:

1. Navigate to your Calendar screen.

2. Click the Add Calendar Event button at top right.

3. Select the options for your appointment.

- **Type** - Either advising appointment or general event.
- **Reason** - The purpose of the appointment.
- **Comments (Optional)** - Information you'd like to share with the advisor to help them prepare for the appointment.
- **Location** - The location where you will meet your advisee.
- **Date** - Select the date when you'd like to schedule the appointment.
- **Add an Attendee** - Choose which student(s) that attending the session, you can also request for another staff member to be present.
- **Choose A Time to Meet** - The scheduling grid will display the entire week of the day you select so that you can see available days and times that may work for your schedule.
The scheduling grid allows you to select a day and time this appointment will take place.

- **Green checkbox** - Signifies an open time block that is available for that day. Check one of these boxes to select the time you would like to meet.
- **Conflicts** - Something else is scheduled at that time for the advisor or for the student, such as a class or another appointment. Clicking on the word **Conflicts** will display the details of the scheduling conflict.
- **Busy** - The advisor has this time blocked off in their external calendar. The advisor is typically not available during this time.
- **Drop-In** - Indicates the advisor is available for walk-in appointments during that time. Clicking on the word **Drop-In** will display the details of the drop-in availability.

4. Review your selected appointment options. Then click **Save Appointment**.

The student will then be sent an appointment confirmation email.
Cancelling or Modifying Appointments

1. In the Advisor Home, click the Upcoming Appointments tab and find the appointment you need to edit under Upcoming Advising Appointments.

2. Under the Actions menu, you can send a message to the student for an update to the appointment, add a report, issue an alert, or cancel the appointment.

3. If you click Details, a Manage Appointment window will open where you can delete, cancel, or edit the appointment.

4. If you click Edit, the Edit an Event screen populates with all options that you can edit. Once you have edited what you need to edit, click Save Appointment at the bottom.
Report on Advising Appointment

Reporting on Advising Appointment

You can create a report that details your advising appointment with a student including what you discussed and any relevant documents that need to be attached.

1. In the student’s profile, click on “Report on Advising” on the right side of the screen.

2. In the following pop up window, you can add the reason for the appointment, meeting type, course associated (if any), date, location, attendees, arrival and departure times, a summary and attach any documents. **Note: There is also an option for follow up down in the left corner.**

3. When done click save this report.
Sending a Message to a Student (email)

Sending a Message

1. In the student’s profile, click “Message Student” on the right side of the screen.

2. In the following pop up window, enter all necessary information and add any attachments, then click Send Message (email).

Note: Messages sent by you can be seen under your conversations icon to the left.
Issuing an Alert

Alerts can be issued to student’s profile to draw attention to those who need assistance in various areas such as attendance, failing a class, personal issues, etc. Alerts are automatically assigned to a manager or department. Once the alert is assigned, it becomes a case. Cases are worked by the assigned individual and once they have completed and closed the case, you will receive email notification as to what action was taken with the student. Alerts may be issued from the Action Panel Advisor page or under Staff Alerts while in a student’s profile.

1. From either page mentioned above, click Issue an Alert on the right side of the screen

2. In the Issue an Alert window, search for the student you wish to add an alert to (if you are in a student’s profile the name will already be populated for you) and click their name to add them to the window

3. Complete the other necessary fields in the window and click Submit
Campaigns

Creating appointment Campaigns

Appointment Campaigns enable advisors to request that specific students select a specific date and time in which to schedule an appointment or hold an event. This contrasts with the advisor creating appointments for each student. This feature is commonly used when an advisor must meet with all their students at least once per term.

To begin, click Appointment Campaigns in the Actions or Quick Links menu.

Define the Campaign

In this step, you will set the criteria for your Appointment Campaign. The fields that must be filled out are listed and defined below. Note that if other staff are going to be included on this campaign, the reason/location/date range must align with Campaign Availability for the advisor(s) that are going to be included in the campaign.
**Campaign Name:** Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. We recommend adding your name to the campaign name to make it easier for other staff to know who created the campaign if they are included.

**Campaign Type:** Select one of the two Appointment Campaign types - advising or tutoring.

**Slots per Time:** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.

**Course or Reason:** Add the reason or associated course for the campaign here.

**Begin and End Date:** These are the dates that you want students to start and stop making appointments for the campaign.

**Appointment Length:** This is where you define exactly how long the appointment will be. Durations begin at a 5-minute length and will be determined by your configuration.

**Appointment Limit:** This will determine how many appointments you wish for the student to schedule during the campaign.

**Location:** Select the location of where the appointment(s) will be held.

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**Add Students to Campaign**

After entering the details on the Define Campaign page, click **Continue**.

Your next step is adding students. If you created this campaign directly from a Watch List or Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.

There are several ways to search for and select your students.

**Invite All My Assigned Students:** Adds all students assigned to you to the campaign.

**Advanced Search:** Use the Advanced Search filters to find and select students. After starting the search, you will be presented with a list of students. Select the students you wish to add and then choose **Add Selected Users and Search for More** from the actions menu.

You can remove students from the campaign if needed. For example, if you met with one of the students already and don’t need them to come in during the campaign period, they can be removed.

Once finished, click **Continue** to move to the next page. You will be asked to review the students in the campaign. If these are correct, click **Continue**.
Add Advisors to Campaign

You will need to select yourself as the advisor for the campaign. You may also have the option to select additional advisors to make them available for appointments based on the campaign.

***NOTE: Advisors will need to have their availability defined before they can be added to an appointment campaign. If you do not see advisors you expected to have availability, make sure their calendars and availability are up-to-date.

If your school does not use Campaign Availabilities you can check the box to Include Appointment Availabilities to show available advisors. This section will default to search for campaign availabilities first.

Add advisors to the campaign and click Continue.

Compose Your Message

Your next step is to compose the message that you will send to students. This invitation to schedule an appointment through the campaign will appear in a preview below the message and include information about how to use merge tags.

***NOTE: Do not remove the schedule link from the email body.

Fields used in the message composition are:

Email Subject: The topic will be the subject of the email going to the student.

Instructions or Notes: This will be specific to the landing page students will be taken to when they click on the link in their email to choose the date and time of their appointment.

After you have finished composing your message, it's time to send out your campaign!

Confirm and Send

Review your campaign details, invitees, and advisors on this page.
How to search for students

Advanced Searches

How to perform an Advanced Search

The Advanced Search functionality in Bison Adviser allows advisors, faculty, and administrators to layer a series of filters onto a specific query. With a nearly infinite number of possible combinations, the Advanced Search helps to customize searches so that users are empowered to identify specific groups of students on campus and evaluate these students’ unique needs.

To access the Advanced Search filters, navigate to the Advanced Search icon on the left side tool bar and then check the box marked ‘Show Advanced Filters’ on the right-hand side of the screen.
Watch Lists

A watch list is a convenient way to create a list of students that you would like to follow or somehow interact with in the future. This list of students that you create (and manage) is only visible to you.

To create a watch list, run your Advanced Search and return a list of students. Once you have your list, select all students you wish to add by selecting the gray box next to their name, or by selecting the entire list by clicking on the gray All box. After selecting your students, click on the Actions Menu:

From here, select Watch at the bottom of the list:

You may either add students to an existing Watch List or you may select Create New List.

Some possible watch lists may include:

- Advisees on academic probation
- Advisees who looking to transfer into a new school
- Advisees who are on scholarship
- Advisees who are in their first term after reinstatement

**Note: You can export any list into an Excel Spreadsheet from the Actions Menu**
Saved List

Saved Lists (searches)

After searching for and retrieving a list of students, Bison Adviser allows you to save the search parameters you used so you may quickly re-run the same search without needing to manually enter in the parameters every time. To save a search, click on the button Save above your list of students.
Kiosk

What is a Kiosk?

Within the Bison Advisor Platform, the kiosk enables self-service check-in to advising or tutoring appointments, and any other service locations or facilities for which the kiosk functionalities are active. A kiosk can be used to replace traditional paper sign in sheet with digital recordings.

Any laptop or desktop with USB functionality can be used as a kiosk when a user with the correct permissions logs into the Platform and selects “Kiosk Mode” from a menu.

Accessing the Kiosk

The Kiosk feature is located at the bottom right of the screen under “Additional Modes”. Once you click this you will see the screen below.

Once you open the “Advising Kiosk” you will choose the location of where you are providing services or hosting the event.

Kiosk Setup

Follow the steps provided to set up the kiosk mode at this location.
How Students Interact with Kiosks

1. Identify Yourself

Students either swipe their student ID card or punch in their student ID on the screen.

2. Choose a Service

Students choose the student service for which they need help. If a kiosk is only offering one student service, students may skip this step.

The next screens will depend on the type of student service selected. Click a link to learn more.

**Record a Visit**
Services that require tracking a student’s attendance for a reason

**Track Time**
Services used to track a student’s time (both check-in and checkout)

**Email an Advisor**
Services that allow a student to email any advisor from the kiosk, that has current availability at the same location

**Drop-In Appointments**
Services that allow students to add themselves to the waiting list of any available advisor

**Scheduled Appointments**
Services that allow a student to schedule an appointment with their assigned advisor at a kiosk
**Terms to Know**

**ADVISER REQUEST**

If a student wants to schedule an advising appointment but cannot find a convenient time, then they can submit an “Advisor Request”. This request contains the student’s availability and preferred location to receive services. Requests appear in the advising home pages, where advisors can match the requests by scheduling an appointment with the student.

**REPORT ON ADVISING APPOINTMENT**

Advising reports enable advisors and tutors to document their appointments with students. These forms catalog important information about the appointment (e.g., attendance, time and location, summary commentary). Please keep in mind all advising summaries can be seen by all advisers.

**NOTE**

Notes are used to attach commentary to a student’s profile that is not associated with a specific advising or tutoring appointment. In this way, they are unlike “Advising Reports”, which are directly associated with an appointment. If you want to indicate that an appointment took place, you should file an “Advising Report” by clicking “Report on Advising” on a student’s profile page.

**CATEGORY**

Categories are system-wide identifiers of students (e.g., first generation student, minor, athlete). A student can belong to multiple categories. The categories to which a student belongs is displayed at the bottom of the student’s overview page. Users can search for students assigned to a category in “Advanced Search”.

**TAGS**

Tags are like categories, but they allow individual users to group similar students together by a common affiliation not otherwise captured in the data (e.g., choir member, interest in graduate school). All users can utilize tags to search for, report on, or communicate with these groups of students. A student can be assigned multiple tags, and the tags that have been applied to a student display at the bottom of the student’s overview page.

**REMINDERS**

There are multiple reminders in the platform. Students have the option to receive emails and text messages that remind them of an upcoming appointment. Advisors can also add a reminder to a student account to remind themselves to follow up or complete a certain task.

**WATCH LIST**

A watch list is a convenient way to create a list of students that you would like to follow or somehow interact with in the future. This list of students that you create (and manage) is only visible to you.
SAVED SEARCH

After searching for and retrieving a list of students, you can save the search parameters you used so you may quickly re-run the same search without needing to manually enter in the parameters every time.

ALERTS

Alerts are a way to draw attention to a student who may potentially be at-risk or have an issue in a particular area. Alerts can notify different users across campus, as well as the student.

CASES

A case is a result of an “Alert” being issued or raised on a student. Once raised a case will be created and designated to the proper department and/or employee, also known as a “Case Owner”

CASE OWNER

The case owner is someone who has been assigned and is managing the case. For example, if a case is assigned to a group in Financial Aid, a case owner can be assigned to interact with the student and close that case.

For quick tips and an overview of the student profile page please visit this link:

(To use this link, you must login to Bison Adviser)


Questions, Comments or Concerns

Please contact Michael Bryant

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Academic Systems Specialist