ESU EAST STROUDSBURG UNIVERSITY

WarriorFish
User's Guide

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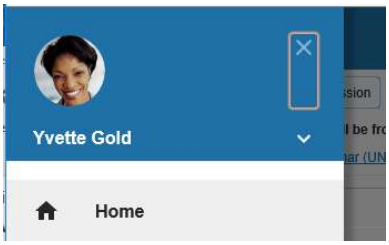
Get ready for students

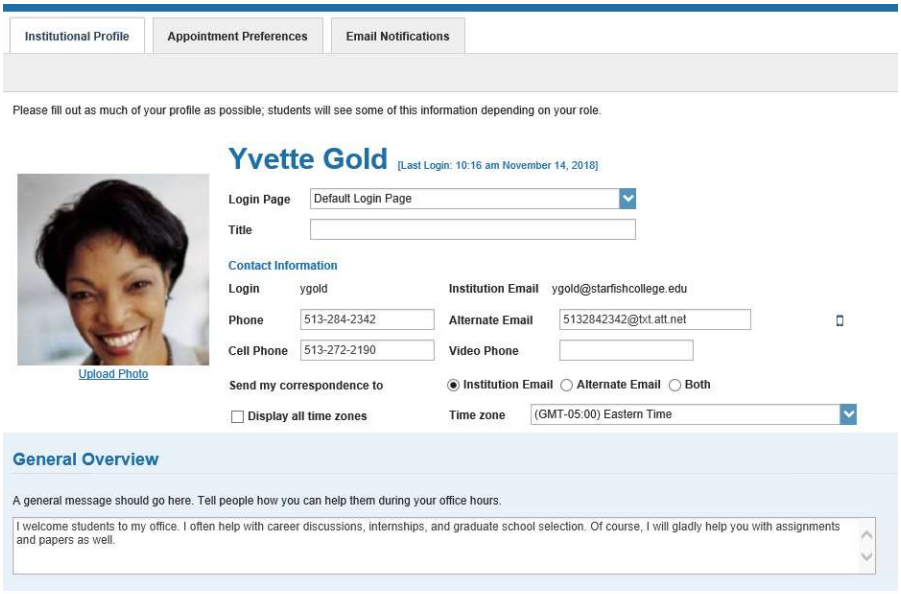
Before you begin taking appointments with students, you will want to personalize your profile, and set up your availability via office hours or group sessions. Each of these tasks is covered in the sections that follow.

Personalize your profile

Click your name in the top right corner of your Starfish **Home** page to open your **Profile.** Your profile has three tabs: **Institutional Profile, Appointment Preferences** and **Email Notifications**. Click the profile tab name to edit it. Setup for each tab is described below.



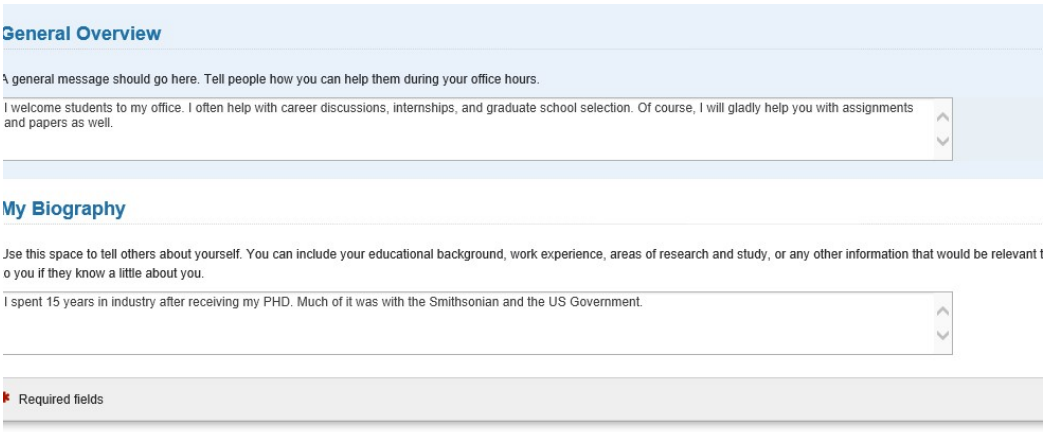
Edit Institutional Profile



1. Use the “Upload photo” link to add a profile photo if your photo has not already been uploaded during configuration.

2. Update any contact information that is not pre-populated.
3. You can provide an alternate email address in addition to your institutional email for email notifications.

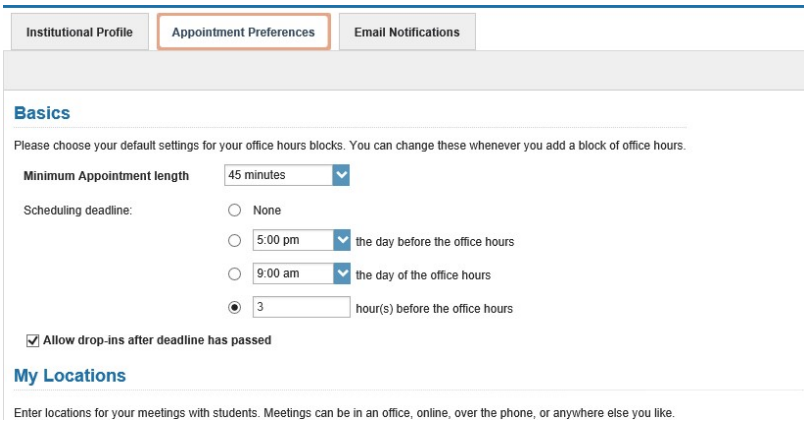
4. Write a description about yourself in the **General Overview** and **My Biography** fields. Remember that this is the information that students see when making an appointment with you.



5. Click the **Submit** button at the top or bottom of the page to save your updates.

Edit Appointment Preferences

This tab defines defaults related to how students can interact with your office hours. Set your preferences before you begin adding Office Hours.



1. Select a value for **Minimum Appointment Length**. This will be used as the default when you set up new Office Hours. Institution settings for specific appointment reasons may override your selection when a student makes an appointment.

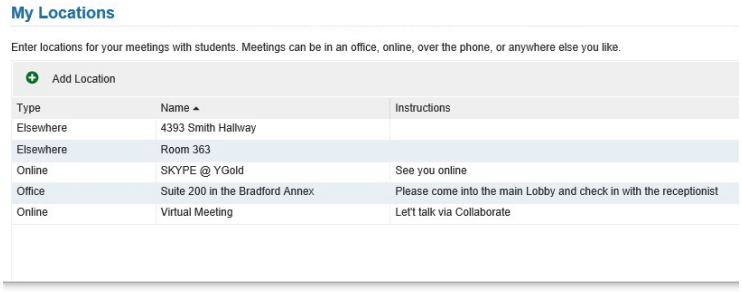
2. Define your **Scheduling Deadline**. The deadline is imposed based on the start time of any office hour blocks vs.an individual time slot. If set to 'None,' a student may schedule an appointment with you right up to the time slot.

3. Check the box to "**Allow drop-ins after deadline has passed**" if you wish to include a note in your calendar letting students know that they cannot schedule, but can walk in to your office after the scheduling deadline has passed.

Add Locations

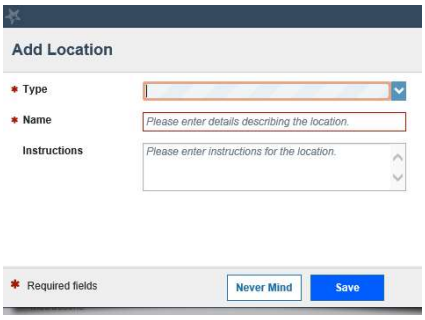
Add all possible meeting locations, including physical offices, phone numbers, chat services, or anywhere else you might want to meet with students. When you build your calendar availability/ add Office Hours, you will select which of these locations apply to each set of hours.

1. Click Add Location.



2. Select the type of location, enter a descriptive name and enter any relevant instructions. Students will see this information when scheduling an appointment for office hours that have been designated for this location.

3. Click the **Save** button.
Repeat this process to add any additional meeting locations.

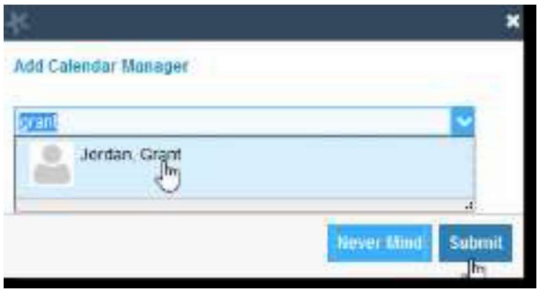


Add Calendar Managers

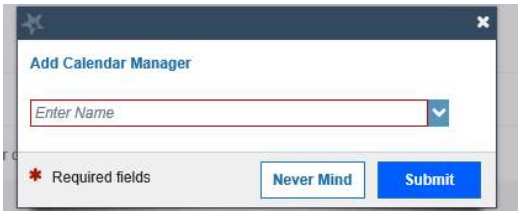
In the Calendar Managers section of the **Appointment Preferences** tab of your profile, you can designate other users who can see and edit your calendar. A Department Chair or Dean may assign this role to a departmental secretary or administrative assistant.

1. Click **Add Calendar Manager**.

2. Begin typing a user's name. Search results will begin to populate.



3. Select a user from the search results and click the **Submit** button. Repeat these steps to add more calendar managers.

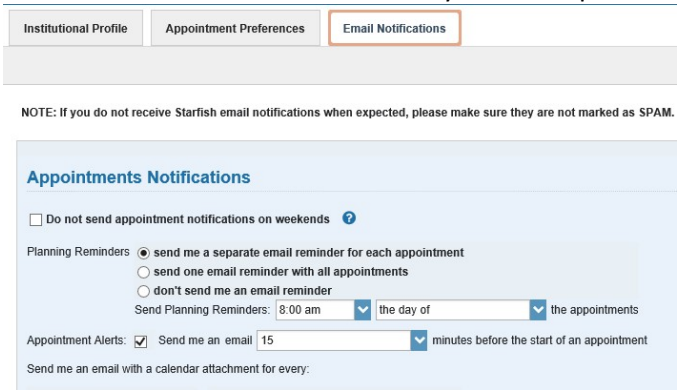


Save Appointment Preferences

When you have made all desired edits to each of your **Appointment Preferences** profile settings, click the **Submit button** at the bottom or top of the Appointment Preferences tab to save your changes.

Edit Email Notifications preferences

Specify if and when you wish to receive Planning Reminders, Appointment Alerts, and calendar attachments. Defaults will be used if you don't update these options. These are described below.



- **Planning Reminders**: Receive optional email reminder(s) sent separately for each of the day's appointments, in one email, or not at all. Specify the date and time for reminders.

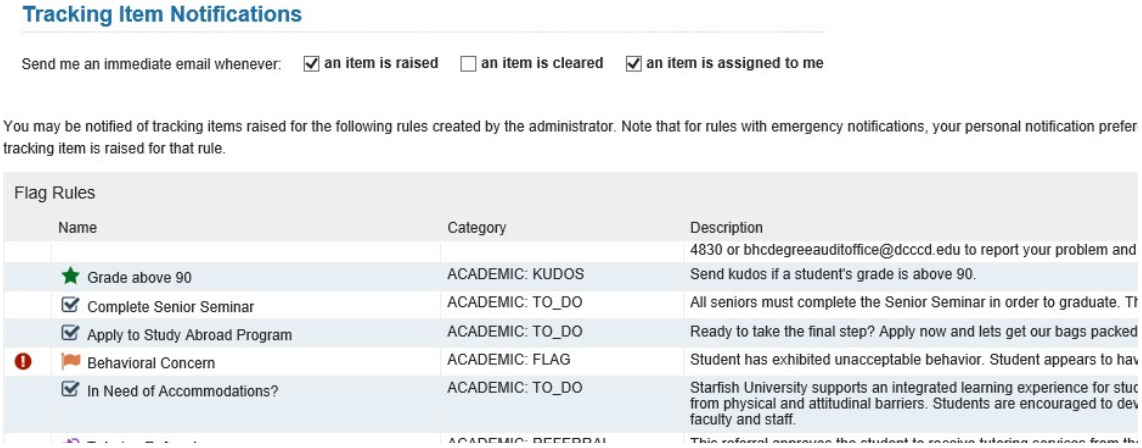
- **Appointment Alerts**: Receive an optional email reminder sent a certain number of minutes before the start of an appointment.

- **Calendar Attachments**: Receive emails with calendar attachments for schedule.

- **Read busy times from my external Google** *(or Exchange)* **calendar: B**usy times from your Exchange calendar can be displayed in the system. Follow the "Click here" link for instructions to complete your personalized setup. See the External Calendar Integration section for more details.

Update Tracking Item Notifications

Your administrator has determined which items you will be emailed. Items that may trigger an email to you are listed in the Flag Rules table below your notification options.



You have the ability to customize how you receive those emails including whether you will receive your notifications as a summary email of all recent activity or as individual email for each item.

1. Select either the **Daily** or **Weekly** summary option to receive one email at the frequency specified with all relevant activity since the previous summary. Specify the time of day (for daily) or day of week and time of day (weekly).

2. Select the checkbox for each event for which you want an immediate individual email to be sent to you. Events include when an item is raised (or created) when an item is cleared (or closed) and when an item is assigned to you.

3. Click the **Submit** button in the top or bottom right of the Email Notifications page to submit any changes you have made for appointment notifications or tracking item notifications.

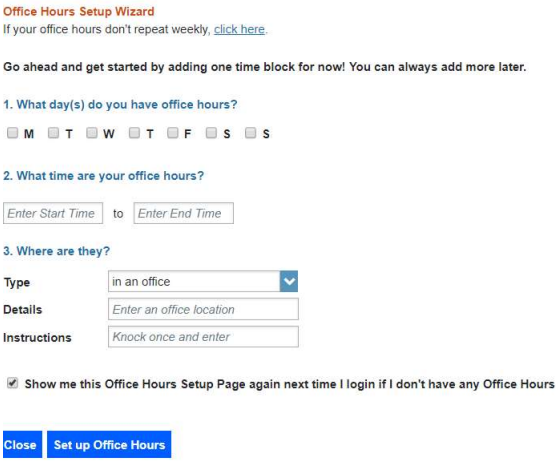
Establish your availability

Students can only schedule an appointment at times you indicate are available by adding office hours or group sessions. There are three ways you can add office hours: use the Office Hours Setup Wizard for quick initial setup, use the Add Office Hours button to add additional blocks at any time, or use the Scheduling Wizard to setup multiple office hour blocks that don't follow a consistent recurrence.

Create an office hour block with the Office Hours Setup Wizard

The first time you log in to WarriorFish the Office Hours Setup Wizard will display if you have a role that can be a calendar owner.

1. Complete the fields presented to specify:
   - **What day(s) do you have office hours?** - check the boxes for each day.
   - **What time are your office hours?** - enter a start and end time.
   - **Where are they?** - select the **Type** of setting and enter the **Details** in the field provided (e.g. the building and room number of your office).
   - If relevant, provide **Instructions** for students who make appointments with you.



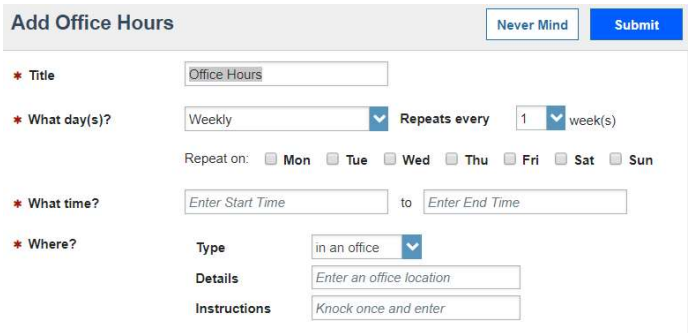
2. Click the **Set up Office Hours** button to save your office hours.

Add Office Hours

The **Add Office Hours** option is meant for setting up a recurring block of time on a regular pattern such as weekly or daily at a certain time. If you want to set up a group of Office Hours that are less structured, use the Scheduling Wizard.

1. Click the **Add Office Hours** button on your Starfish **Home** page or **Appointments** page.

This opens the **Add Office Hour** form.

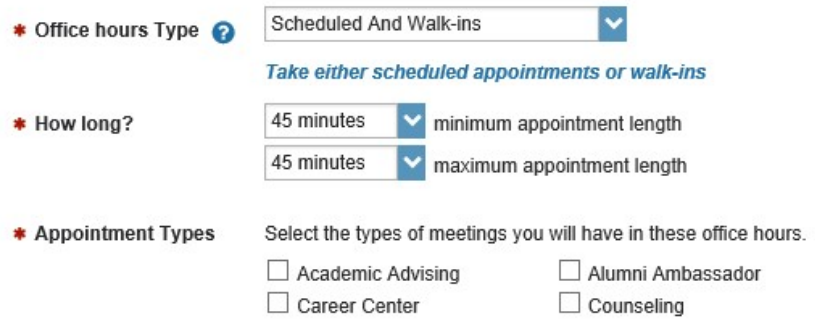


2. Enter a **Title** (name) for this block of time. Students will see this name when they view your calendar. The title will also help your or others managing your calendar identify different types of office hours.

3. Select **What day(s)?** and indicate any recurrence (if applicable).

4. Use the **What time?** fields to enter the start and end time for the office hours.

5. Select **Where?** meetings will be held using the checkbox(es) next to your location(s). If you choose more than one location, the student will be able to choose his/her preferred location for the meeting.



6. Select the **Office Hour Type** for meetings you will take during this block.

- Select **Scheduled and Walk-ins** if you will be using the kiosk/waiting room features, and you plan to take walk-ins between appointments.
- Select **Scheduled Appointments Only** if you will not take any walk-ins.
- Select **Walk-ins Only** to show the time as available to students, but disallow anyone from making advance appointments

7. Select **How long?** meetings can be by selecting a minimum and maximum duration.

8. If your role has the ability to add more than one **Appointment Type**, you will see checkboxes that allow you to select which types apply to this block of time. Appointment Types dictate:

- which students can schedule during this time (based on the role that connects you),
- the appointment reasons shown to students,
- which SpeedNotes will display, and
- which roles can view the appointment and its notes.

If you believe that your role should have additional Appointment types, please contact Allison Zettlemoyer azettlemoy@esu.edu with request.

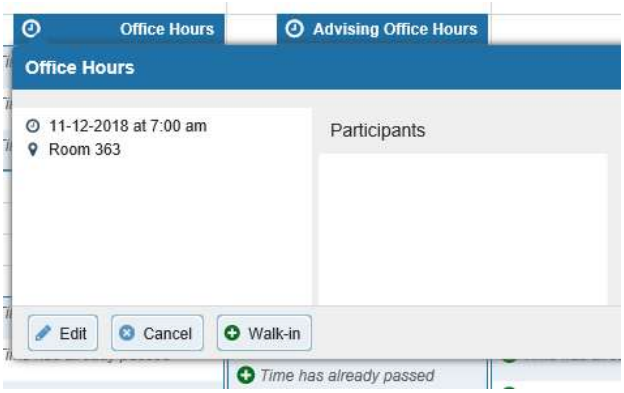
9. Use the **Instructions** box to enter instructions to students scheduling with you during this block of time. Instructions are required for blocks that allow Walk-ins.

10. Optionally, click the **Start/End Date** tab to set a time frame for a repeating office hour block. For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences.

11. Click the **Submit** button at the top or bottom of the Add Office Hours form to save your Office Hour block.

Edit office hours

1. Hover over the office hours menu icon next to an office hour title to open the **Office Hours** pop up card.
2. Select **Edit Office Hours** to modify: the frequency of the office hour block's recurrence, the time of day, locations, office hour types, minimum and maximum duration of appointments, appointment types, instructions, or a start/end date of the series.



3. Click the **Submit** button on the **Edit Appointment** form to save your changes.

Notes: You cannot edit the days of the week or the nature of the recurrence (e.g. weekly). To edit the days of your availability, delete the originally scheduled block of office hours first. Selecting "edit" only allows time changes within your originally designated days of availability.

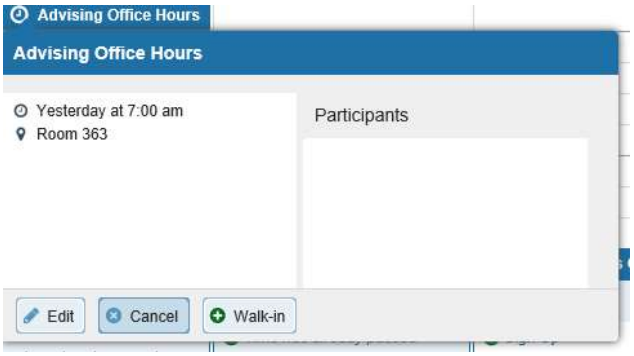
Cancel a series of office hours

1. Hover over the office hours icon next to an office hour title to open the **Office Hours** pop up box.

2. Click **Cancel**, then click "The entire series" to cancel all occurrences of the office hour block. You will be prompted to confirm the date from which to cancel the series, and to add a message that will be sent to anyone who had time scheduled with you during the office hours you are canceling.

3. Click the **Submit** button on the **Cancel Series Confirmation** form to cancel the office hour block.

Cancel a single occurrence of an office hour block



1. Hover over the icon associated with the block of hours for the selected day ().

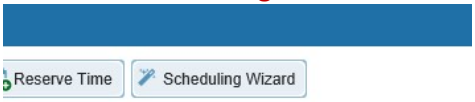
2. Click **Cancel,** from the pop up card that is displayed then select **"**Just this one" to cancel office hours for the selected day. You will be prompted to confirm the cancellation and can add a note that will be included in an email to those whose appointments are canceled.

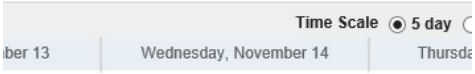
3. Click the **Submit** button to cancel the Office Hour occurrence.

Add less structured office hours (Scheduling Wizard)

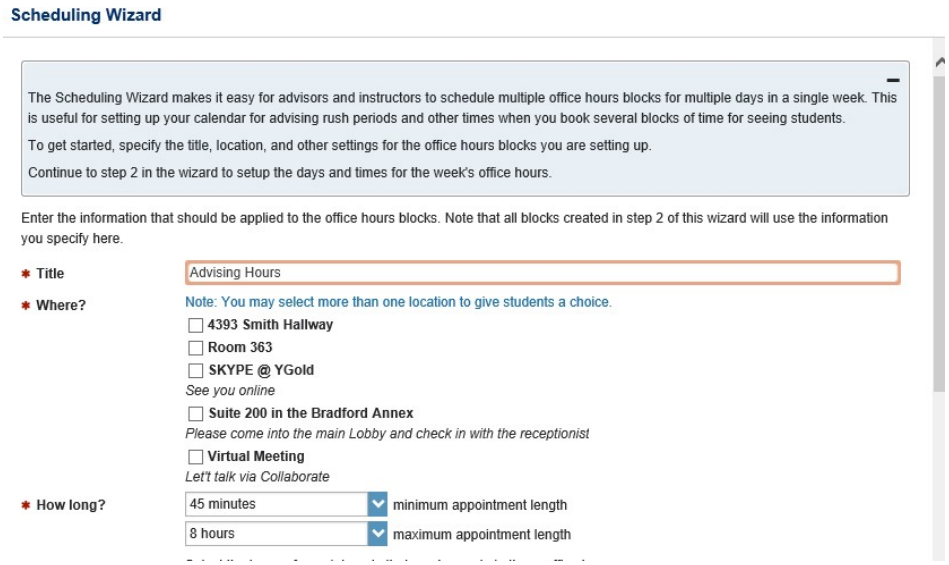
Students can only schedule an appointment at times you indicate are available by adding office hours or group sessions. The Add Office Hours option is geared toward setting up a recurring block of time on a regular pattern such as weekly or daily at a certain time. If you want to set up a group of Office Hours that are less structured, use the Scheduling Wizard.

1. Click the **Scheduling Wizard** button from your Starfish **Home** page or **Appointments** page.



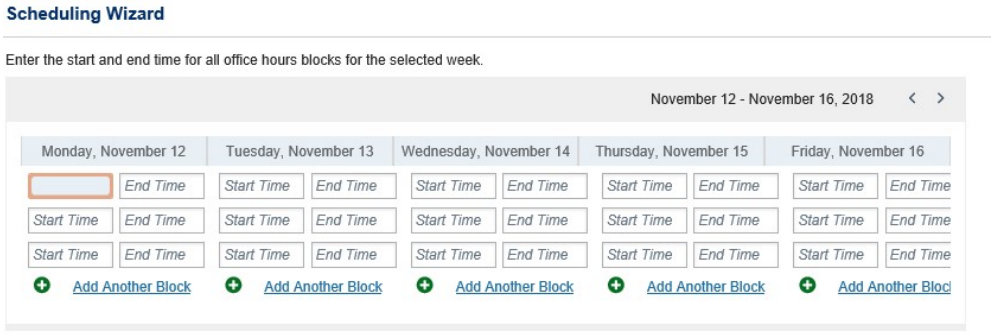


2. Complete the first page of the scheduling wizard by entering the **Title**, location (**Where?**), duration (**How long?**), **Appointment Types** and **Instructions** that should be applied to ***all*** of the office hour blocks that are to be created.



3. Click the **Next** button.

4. The date and time page of the wizard is displayed using a Monday through Friday grid for the current week. The date range is displayed in the top right corner of the grid.



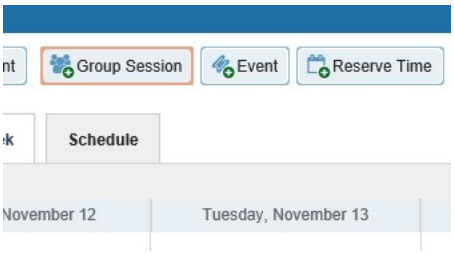
5. Use the < > controls to the right of the date range to navigate to the week in which you want to begin scheduling the office hours.
6. In the selected week, enter the start and end times for each block in the appropriate day columns. You can schedule multiple office hour blocks on any day within the week.
7. To add blocks to another week, use the < > controls to move to the next week. ***Don't click finish until you've entered all of the blocks!***
8. Click the **Finish** button to create all of the office hour blocks. A summary will be presented.

9. The summary will include a list of hours that could not be created due to conflicts between the blocks you specified and existing calendar items. Make a note of failed blocks before clicking **Finish** to exit the wizard.

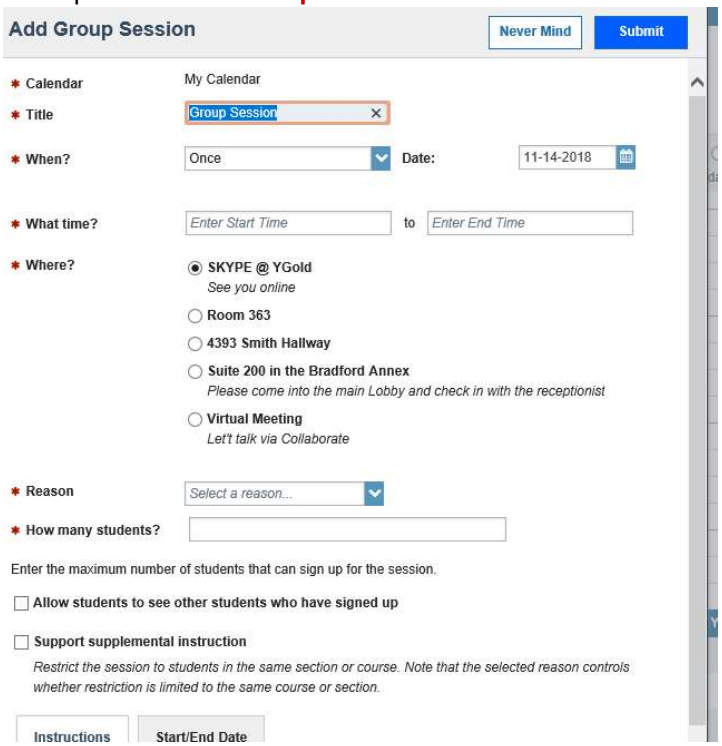
Add a Group Session

Group sessions allow you to create blocks of time in which a specified number of students can meet with you as a group. The steps are similar to adding office hours but include selections that are specific to group sessions.

1. Click the **Add Group Session** button from the **Home** page or **Appointments** page.



This opens the **Add Group Session** form.



2. Enter a **Title** (name) for this group session. Students will see this name when they view your calendar.

3. Select **When?** the group session will occur and select the recurrence.

4. Use the **What time?** fields to enter the start and end time for the group session.

5. Select **Where**? meetings will be held. To add additional locations options, go to the Appointments Preference page of your profile. Only one location can be selected for a group session.

6. Select the **reason** associated with this group session. Reasons listed are those associated with the Appointment Types your role has permission to add. If you don't find the reason you expected, contact your Starfish administrator.

7. Enter **how many students** (maximum) can sign up for the session.

8. If students should be able to see the names of other students who have signed up for the session, check the box labeled "Allow students to see other students who have signed up".

9. If this group session should be limited to students in the same course/ course section, check the box labeled "Support supplemental instruction". When this option is checked, participants will be limited to the course/course section selected by the first student who signs up.

10. Use the **Instructions** box for information that should be shared with students who sign up.

11. Click the **Start/End Date** tab to designate a time frame for the group session if it recurs (as set in step 3 above). For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences.

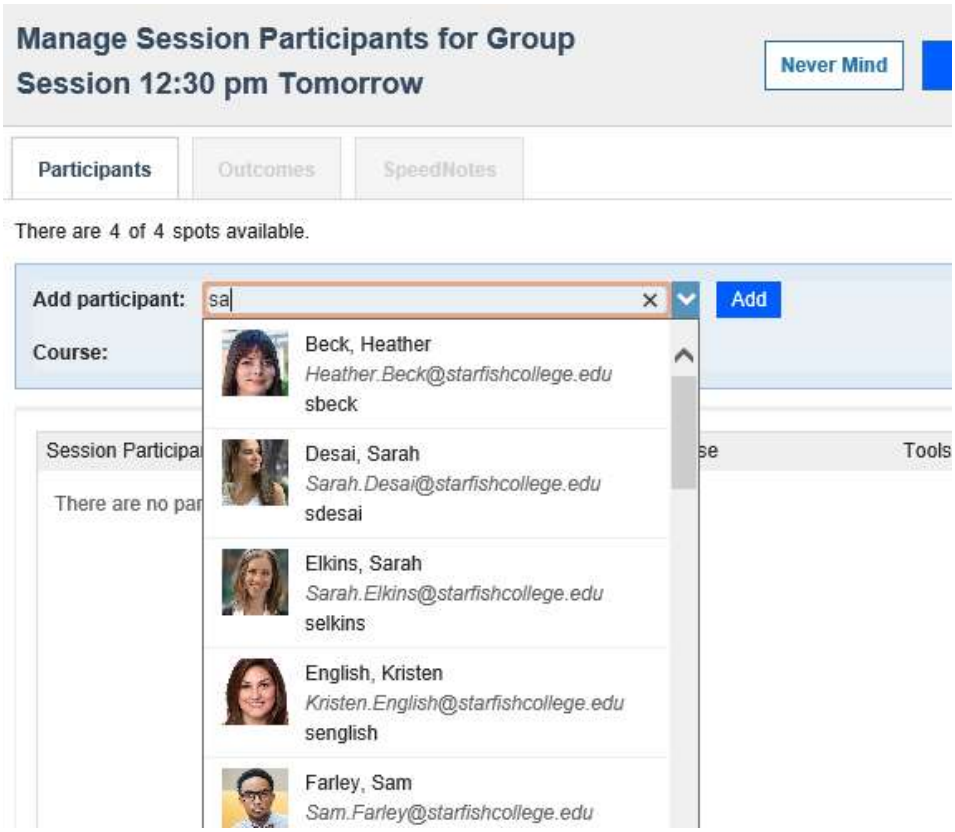
12. Click the **Submit** button at the top or bottom of the form to save your Group Session.

Manage group session participants

You can add or remove participants in an individual group session using the **Manage Participants** link on the **Day** view of the group session.

1. Select **Manage Participants.**

2. Search for a student by typing his/her name int the **Add participant** field, then click the **Add** button to dd the student to the list of participants.



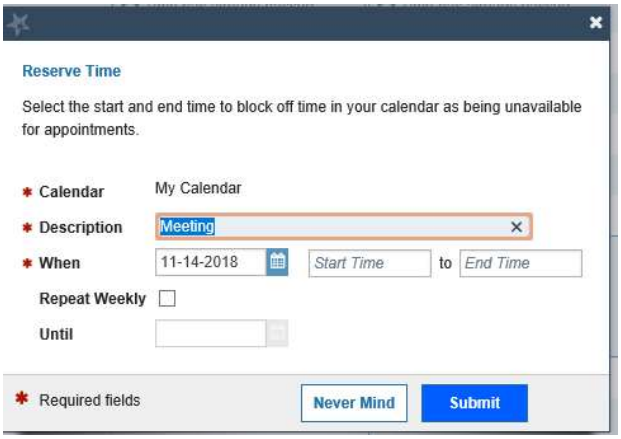
Repeat this process for each student you want to add.

Reserve time on your calendar

Use the **Reserve Time** option to show time on your calendar as unavailable to avoid creation of an appointment during that time.

1. Click the Reserve Time button from the action bar on your **Home** page or **Appointments** page.

2. Fill out the **Reserve Time** form to include a description of the reserved block, the date and time of occurrence. If the block recurs each week, use the “Repeat Weekly Until” checkbox to indicate a weekly recurrence, and select the end date for the block using the date picker provided.



3. Click the **Submit** button to add the reserved time to your calendar.

Make and manage Appointments

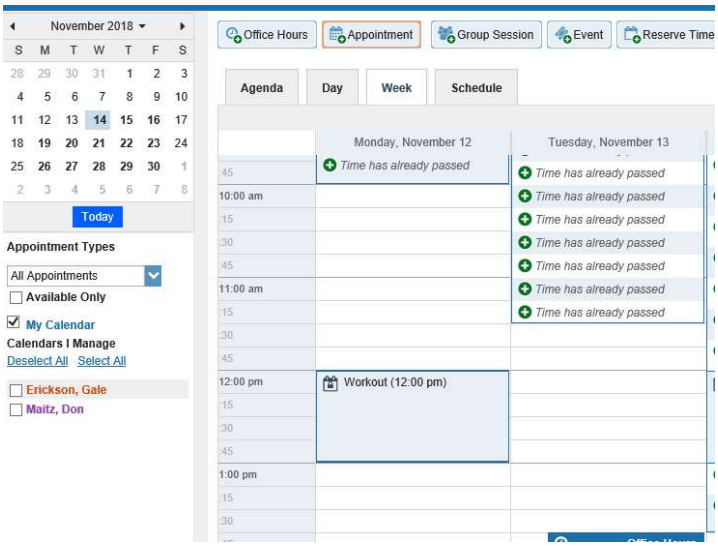
Students may only schedule appointments with you during times you have designated as available, either through your office hours or group sessions.

Add, edit, or cancel appointments on your Starfish calendar

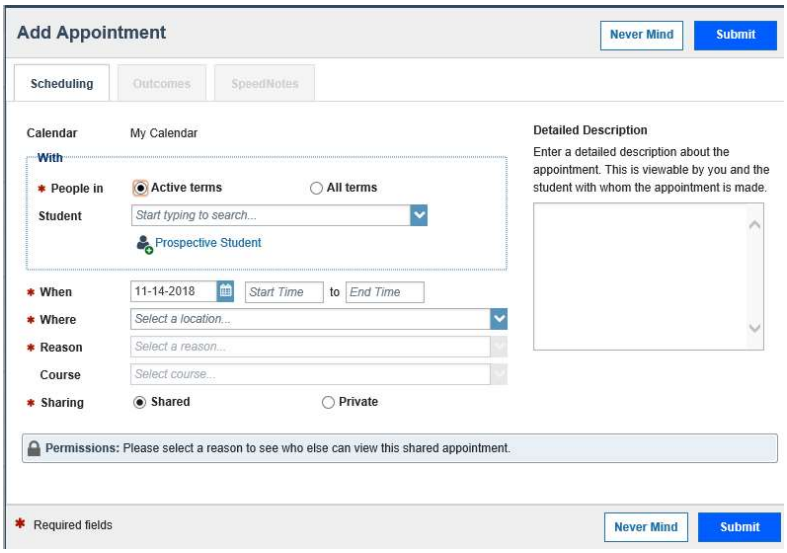
Add an appointment to the calendar

1. Initiate a new appointment using either of these options:

- Click the **Add Appointment** button from your **Home** or **Appointments** page.
- Click the sign up icon for an existing office hour slot using the **Day** or **Week** view of your calendar on the **Appointments** page.



This opens the **Add Appointment** form.



2. Begin typing the name of the desired student into the **With** drop down list box. Starfish will find matching students with whom you have a relationship. Select the desired student from the list.

If you start the appointment from an existing office hour block, the "appointment types" setting in that block may further limit the students available in your list.

3. If you used the **Add Appointment** button rather than selecting an existing time slot, specify **when** the meeting will take place (date, start time, end time).

4. Select the desired location from the options available in the **When** drop down list.

5. Select a **Reason** for the meeting. The reasons available are based on the student you selected and the appointment types that you have access to in your role/ relationship with that student.

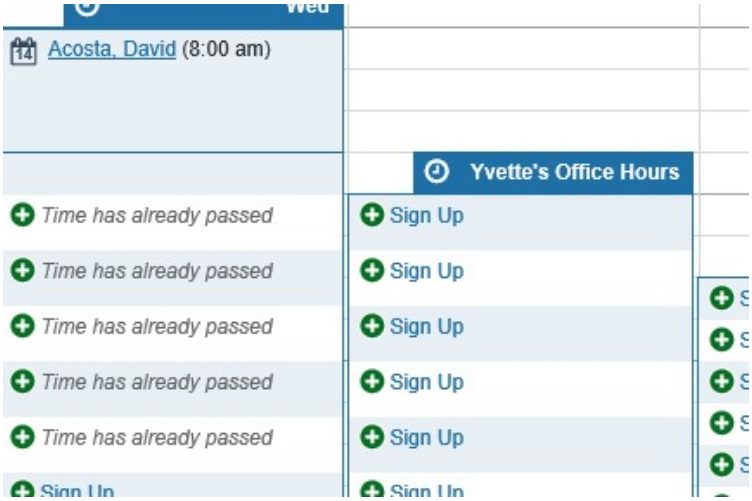
If you have selected a timeslot from a set of existing office hours, the reasons will be further limited to those associated with the appointment types settings for the office hours.
6. If relevant to the meeting and permitted by your role, select a **Course** from the list presented.

7. Select a radio button for **Sharing** to either make the appointment **Shared** (roles listed in the Permissions area for this student can see the appointment and its outcomes) or **Private** (only the person with whom the appointment is made can see it).

8. Type a **Detailed Description** for the meeting that will be visible/emailed to you and the student. This is optional.

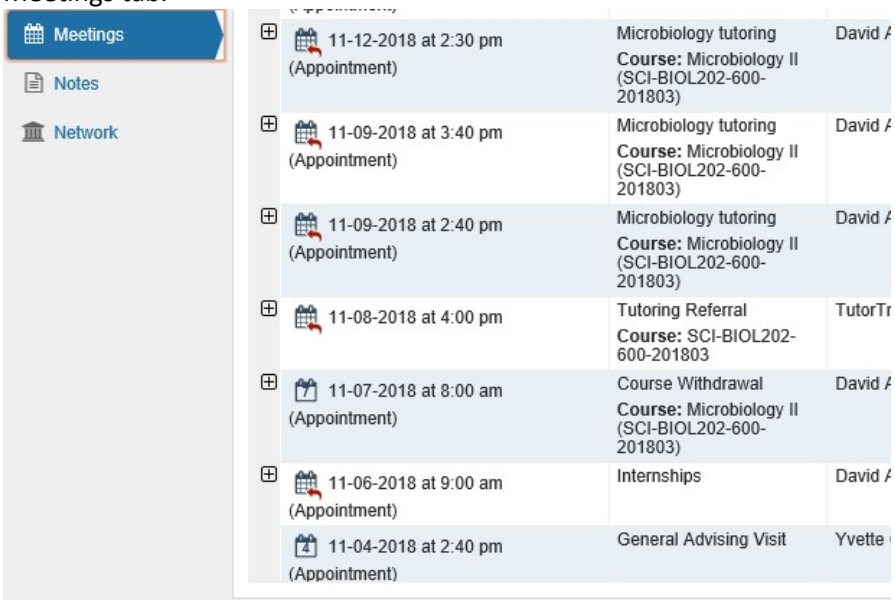
9. Click the **Submit** button to schedule the meeting.

The appointment will appear on the calendar owner's calendar in the selected date and time.

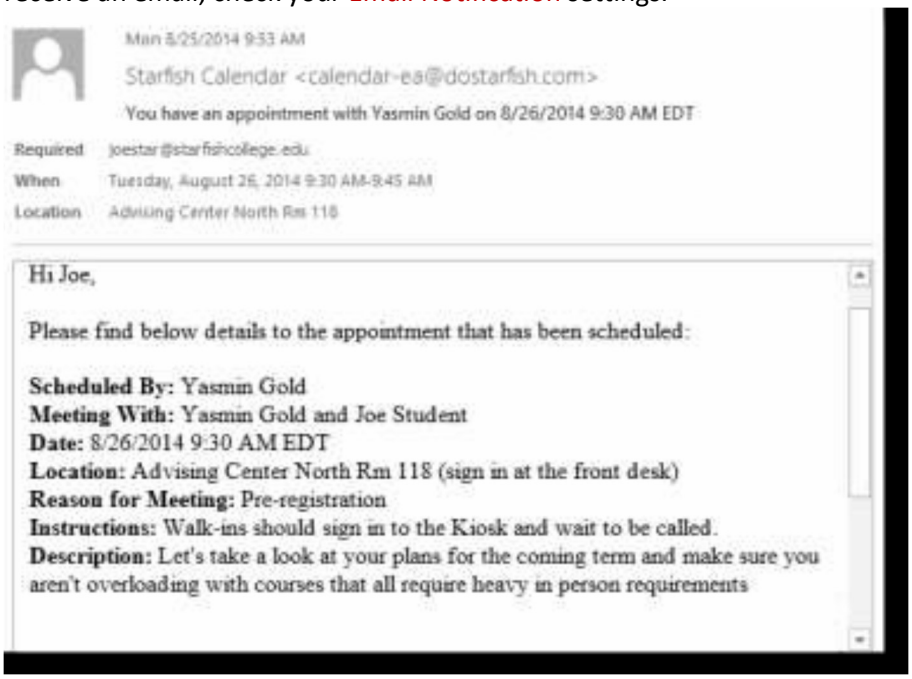


The appointment is also available from the calendar owner's **Home** page on the **Appointments** and **Recent Changes** channel.

The appointment will also appear on the **Meetings** tab of the student folder for anyone that has permission to view the appointment. If you included a detailed description, it will be listed on the Meetings tab.



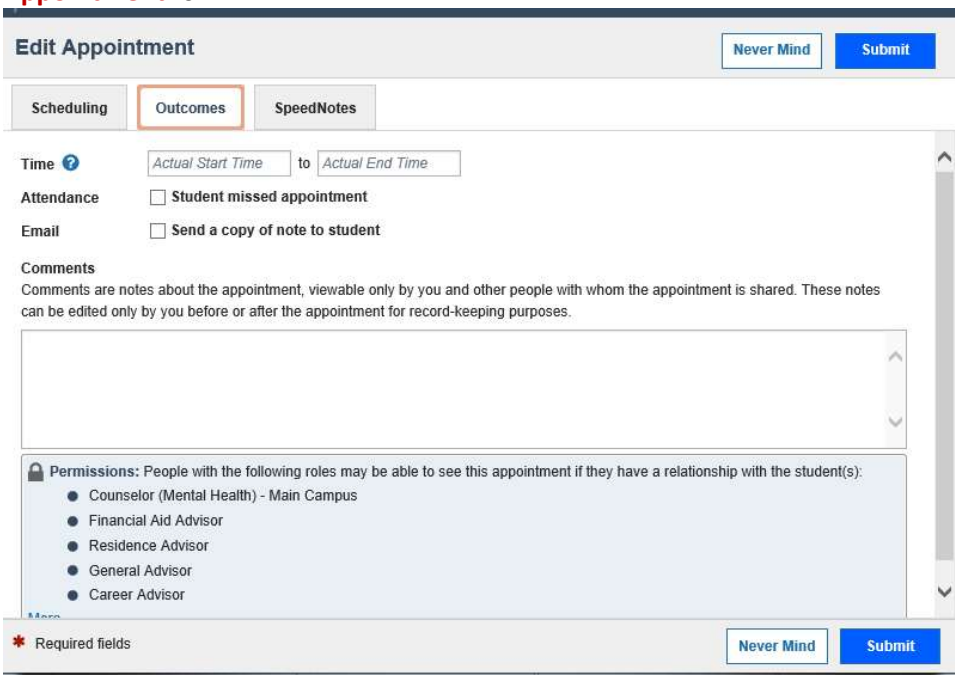
Both the student and calendar owner will receive an email with an calendar attachment for any ***future*** appointments. Appointments created to document prior meetings will not send an email. If you do not receive an email, check your Email Notification settings.



Document outcomes from a meeting

1. Hover over the **Appointment** icon () associated with an appointment.

2. Select **Outcomes** from the **Appointment** pop up card to bring up the **Outcomes** tab of the **Edit Appointment** form.



3. Capture the meeting's ***actual*** start and end time next to the **Date.**

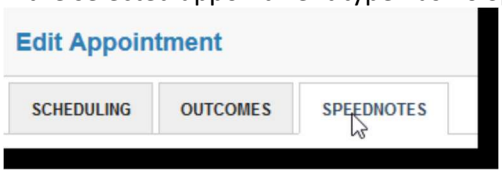
4. If the student is a no-show for a meeting, check the **Attendance** box labeled "Student missed appointment".
5. Add your notes into the **Comments** box.
Note: Click the **Email** check box labeled "Send a copy of note to student" if your comments should be shared with the student via email.

6. Click the **Submit** button to save your updates.

Use SpeedNotes to document common outcomes

SpeedNotes are preconfigured appointment activities that can be checked off to quickly capture recurring meeting outcomes.

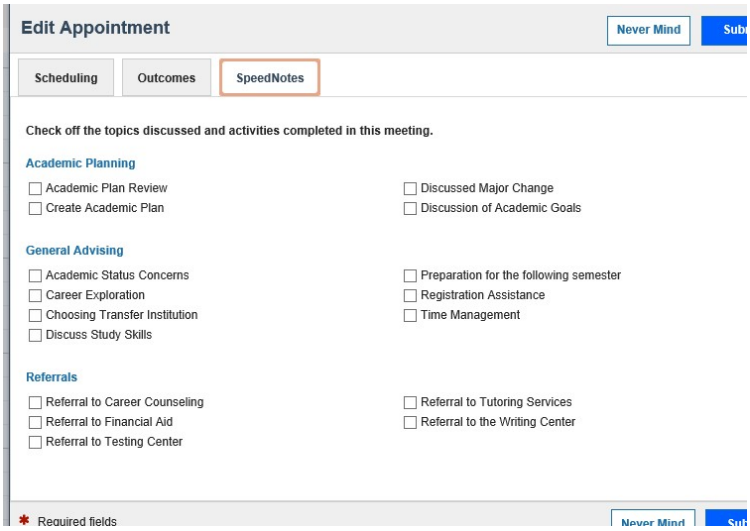
If SpeedNotes exist for any appointment types in your Starfish system, the **SpeedNotes** tab is available whenever the **Edit Appointment** form is open.
If the selected appointment type has no SpeedNotes associated with it, the tab contents will be blank.



1. Hover over the **Appointment** icon associated with an appointment.

2. Select **Outcomes** or **Edit** from the **Appointment** pop up card to bring up the **Edit Appointment** form.
3. Click the **SpeedNotes** tab. Available options may be grouped into categories. Within any category, items are listed alphabetically.

4. Check all boxes that are relevant to your meeting.



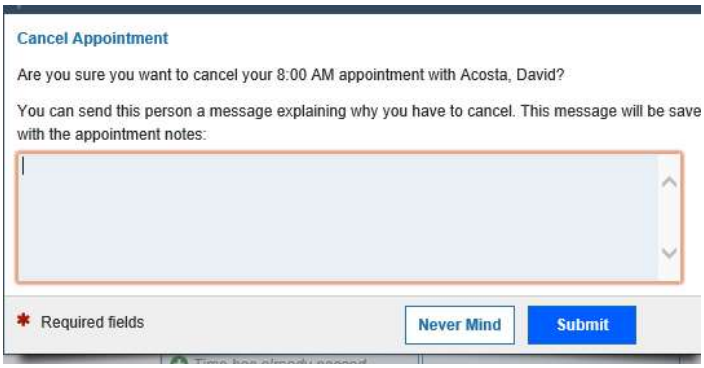
5. Click the **Submit** button to save your updates.

Cancel an appointment

1. Hover over the appointment menu icon associated with an appointment to bring up the **Appointment** pop up box.

2. Select **Cancel** from the Appointment pop up card.

3. The **Cancel Appointment** form is displayed. Type a note explaining the reason for the cancellation (optional but recommended).

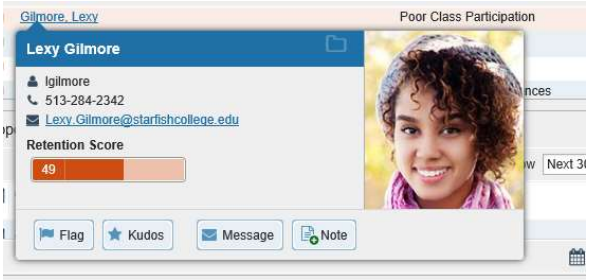


4. Click the **Submit** button to cancel the appointment and send a cancellation email (and iCal attachment) to the student.

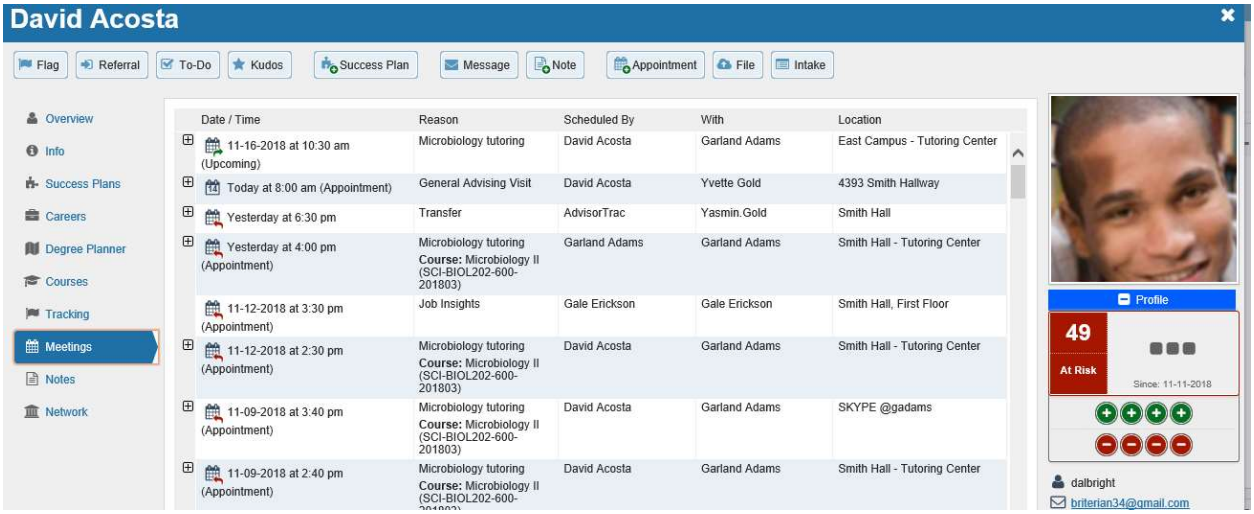
Review appointment information and meeting outcomes

Review appointment and meeting information on the student folder

You can open the student folder by clicking on the link associated with the student's name wherever it appears in Starfish.
For example from the **Appointment** channel on your **Home** page or from the appointment on your calendar.



Click on the **Meetings** tab of the student folder to review information about upcoming and past meetings for this student

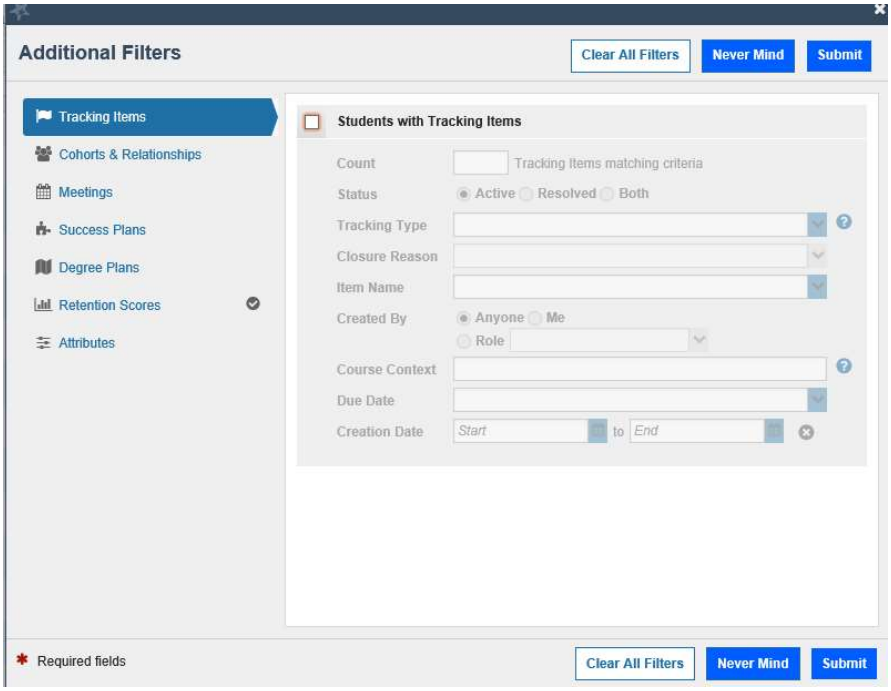


The **Meetings** tab of the student folder includes upcoming appointment information as well as meeting notes captured in Starfish. It may also include historical meeting information from external systems. The information that is available to you on the **Meetings** tab is based on the role(s) that connect you to your students and the appointment types those roles have permission to view.

Filter student lists based on meetings

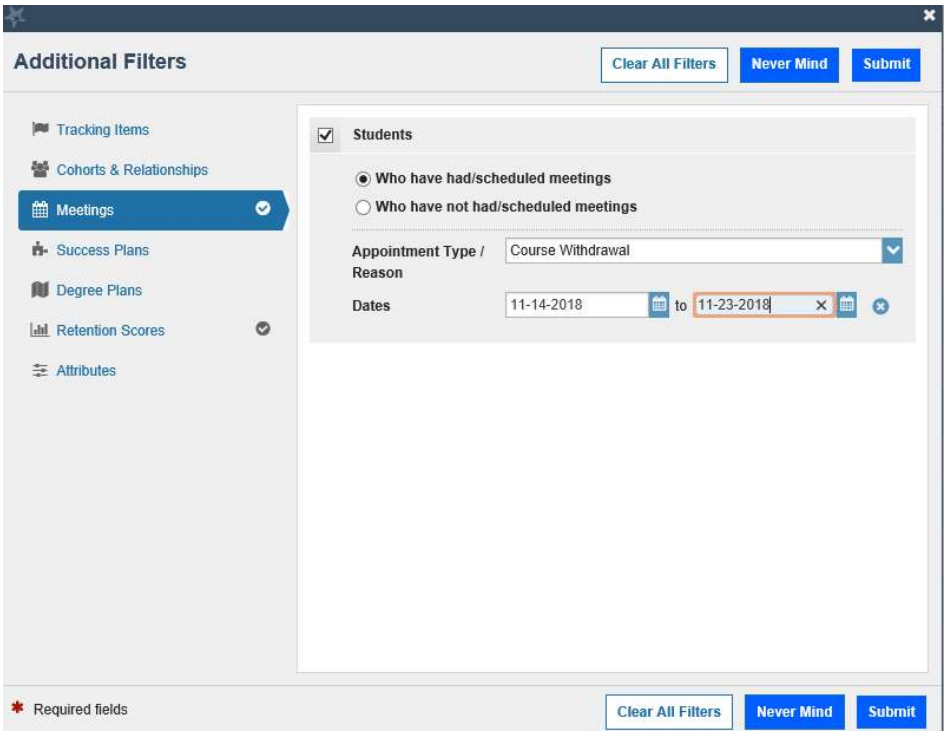
Use the **Meetings** filter from the list of **Additional Filters** available on your **My Students** and **Tracking** tabs to identify students that have or have not scheduled appointments.

1. Click on the **My Students** tab from within your **Students** area in Starfish. Then click the **Edit Filters** button.



2. Select **Meetings** from the filter options on the left and check the box to the left of the word **Students** in the filter criteria area to make this filter active.

3. Select whether you want to filter to students “Who have had/ scheduled a meeting” or to those “Who have ***not*** had/scheduled a meeting. Optionally, you can filter to a specific **Appointment Type/ Reason** and a range of **Dates**.



4. Click the **Submit** button activate your filter.
Your student list will be displayed showing only those students who matched your Meetings filter criteria.

Use calendar managers

Designate someone to manage your calendar

Calendar Managers can see, add, and edit appointments on the calendar owner’s Starfish calendar.
You can designate other users to be your calendar manager through **Appointment Preferences** in your profile.
Institutions can create calendar managers via SIS import or administrator upload. You must contact your Starfish administrator to remove calendar managers created via these methods.

Manage another’s calendar

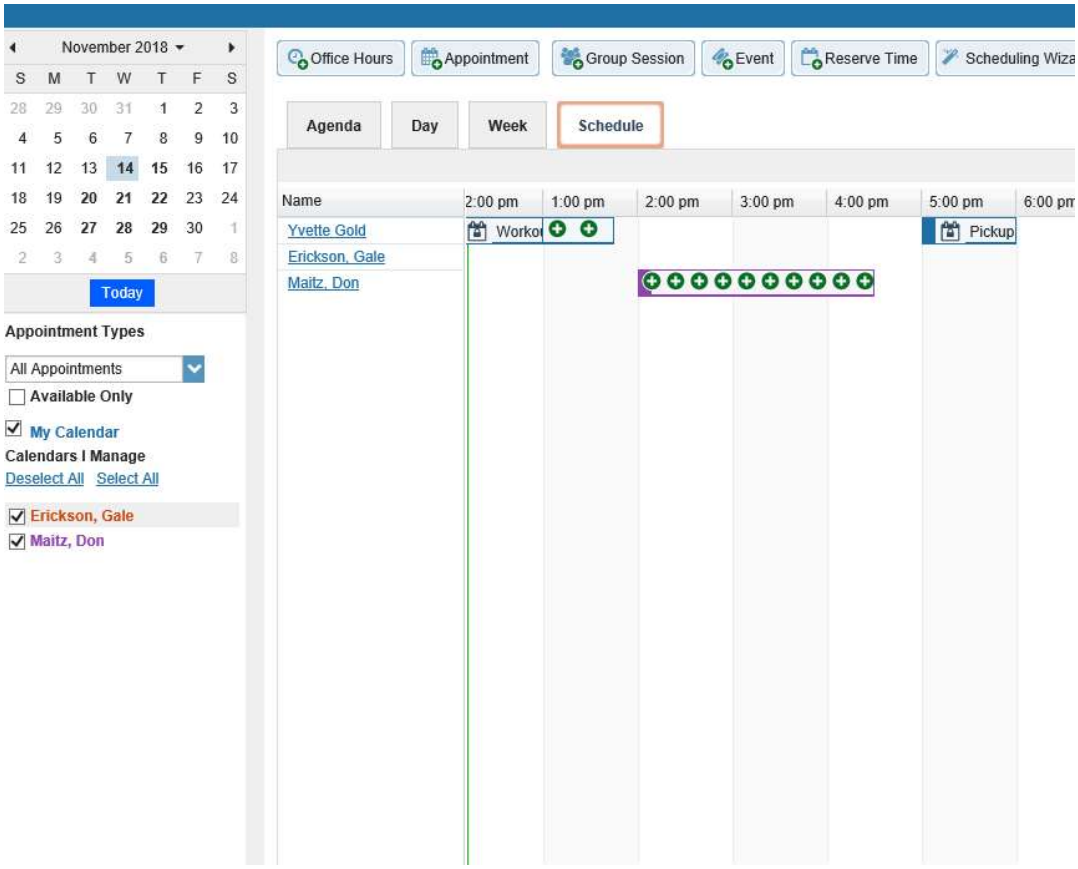
Calendar viewing options

If you are designated as a calendar manager for someone else, when you reach your Starfish Calendar on the **Appointments page**, you will find a list of calendars you have permission to manage under the **Calendars I Manage** heading in the **Calendar Manager** section on the left of the page, beneath the small monthly calendar.

You can filter the calendars displayed by appointment type and/or by individual users' calendars:

- Use the **Appointment Types** filter to limit the view to calendar owners who have office hours of the selected types.
- Check /uncheck the boxes associated with each name under the **Calendars I Manage** heading to limit which calendars are.

To make it easier to distinguish among calendars, each name is displayed in its own color. The color of the name in the listing matches the color used to display appointments on the main calendar.



As a calendar manager, you will find a **Schedule** tab in addition to the **Agenda**, **Day**, and **Week** tabs. If you are opening more than 3 calendars at the same time, rely on the schedule view. If you manage a large number of calendars the "Select all" calendars option will only be available in the schedule view. When you click the **Schedule** tab, Starfish may display a quick reference pop up that includes these tips for using the schedule view:

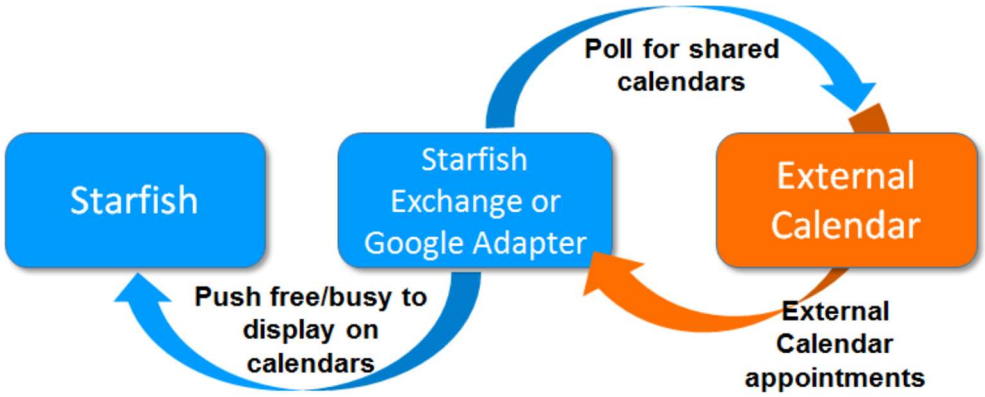
- Use the time scale option at the top of the schedule view to look at the combined schedules in 15 minute, 30 minute or 1 hour increments.
- Click on an individual's name in the schedule view to jump to viewing that user's calendar in the day view.

Make and update appointments for others

- If you are a calendar manager for others, you will have additional calendar selections when adding an appointment to the calendar.
- On the Add Appointment form, you will find a drop down selector in the **Calendar** field listing those individuals for whom you have the calendar manager permission.
- Select the desired staff member to add an appointment to his/her calendar. Options presented in terms of students, locations and appointment types will be based on the selected user's role(s).
- The same holds true if you add office hours, group sessions, or reserved time.

External Calendar Integration

Integration with an external calendar allows free/busy information from a staff member's external calendar to be displayed on that staff members' WarriorFish calendar.
This type of integration is available for Google or Exchange, and your institution must have configured one of those options with Starfish in order for you to take advantage of it.



Configure integration in your profile

Select the Email Notifications tab from your Profile menu.
If either Google or Exchange integration has been enabled on your Starfish system, just above the **Tracking Item Notifications** heading you will find a check box labeled:
"Read busy times from my external Google calendar" or "Read busy times from my external Exchange calendar".
Check the box and then follow the "Click here" link for set up steps specific to your type of integration.

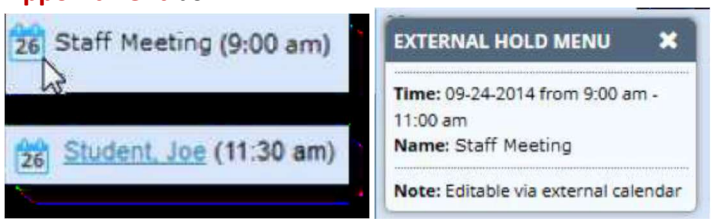
Set your profile to read busy times from Exchange

After you check the "Ready busy times" box in the **Appointment Notifications** section of your profile, you must share your Outlook (or Microsoft 365) calendar with the starfish email address specified in the line labeled **Important** under the "Ready busy times" checkbox.
Follow the "Click here" link to find detailed instructions specific to your version of Outlook or Microsoft 365. Generally speaking, you will share your calendar with the email address specified and give it the ability to read "full details".

External calendar holds on your Starfish calendar

If you have configured Google or Exchange integration as described in the previous section, information from your external calendar will begin to appear on your Starfish calendar. Items from your external calendar will appear as ***external holds*** on your Starfish calendar.

An external hold is distinguishable from a Starfish appointment on your Starfish calendar in two ways:

1. The title on the calendar does not include the hyperlink to the student folder.

2. When you hover over the appointment menu icon the **External Hold** box is displayed rather than the **Appointment** box.