Bengal Success Portal [BSP] – Training Guide for Staff & Faculty

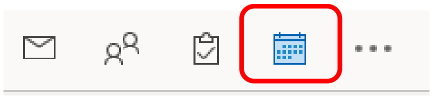
Bengal Success Portal [BSP] gives you a convenient way to keep track of your students – raising flags when you observe a pattern of behavior that concerns you, ensuring that the people on campus who can intervene are aware. It also allows your students to easily book an appointment with you or someone else who can help.

Getting started is easy. BSP will automatically display all students that you have been assigned or are enrolled in your courses.

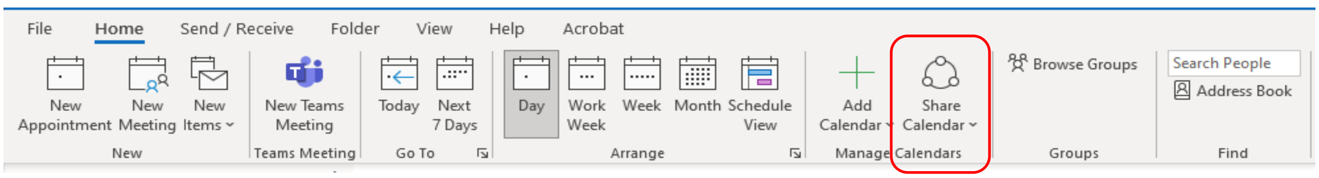
Section 1: How to share and sync your Office 365 Calendar with Bengal Success Portal (BSP)?

Important: You must first share your calendar with starfish@buffalostate.edu.

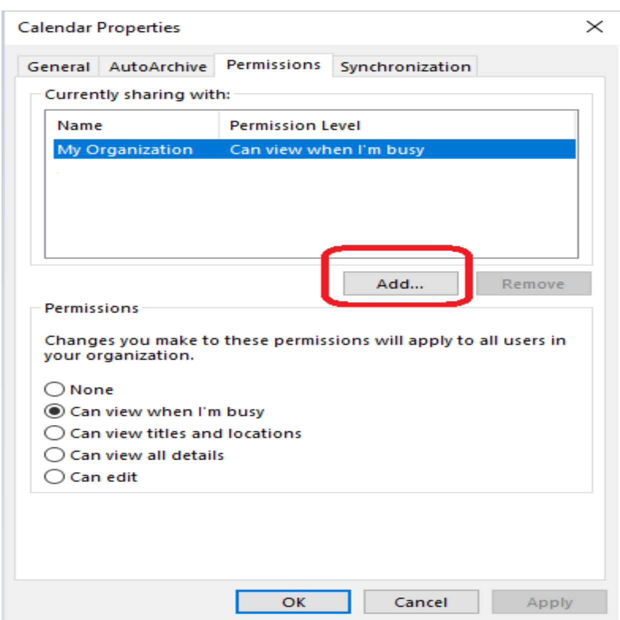
1. Go to your calendar page in Outlook



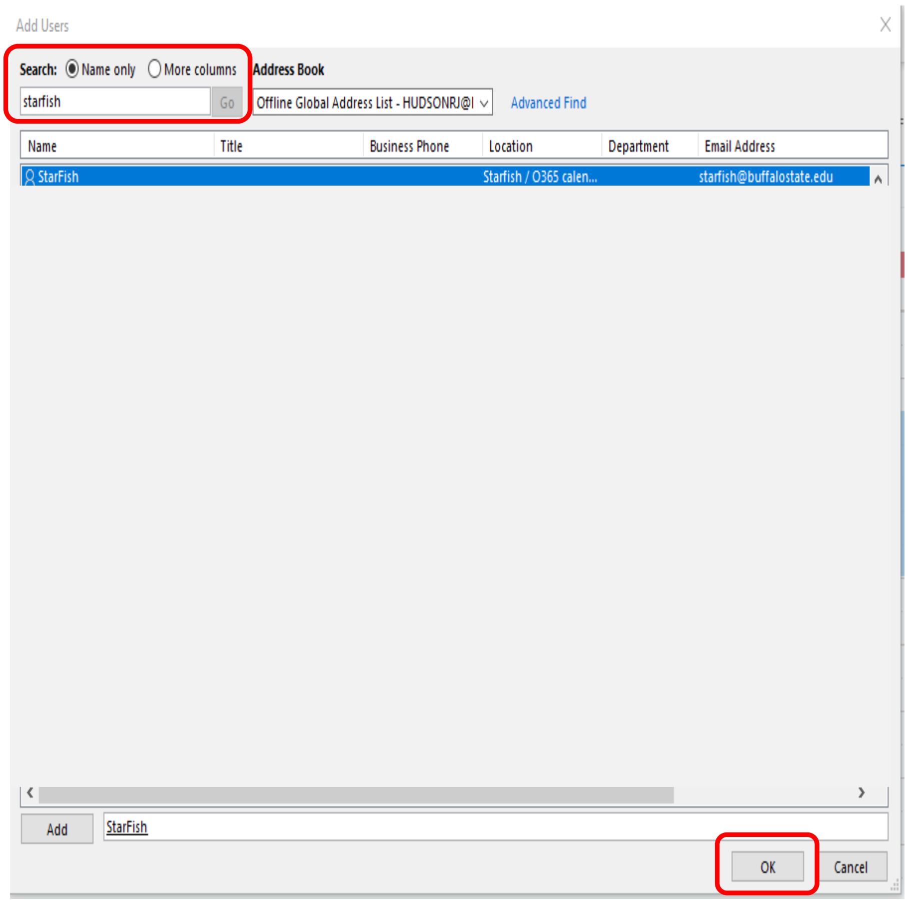
2. Select **Share Calendar**



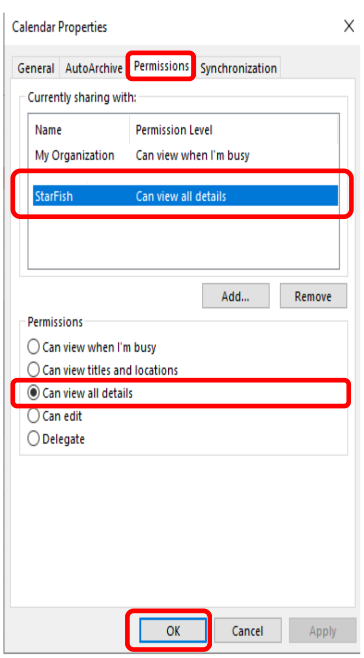
- Select **Calendar**. You will see the **Calendar Properties** window.
- Select **Add**



3. After you click **Add**, you will want to search for the Starfish email address as illustrated below.



4. Go back to your **Calendar Properties** window and under the **Permissions** tab select **Starfish**. Under **Permissions** select, **can view all details**, and hit **OK.**



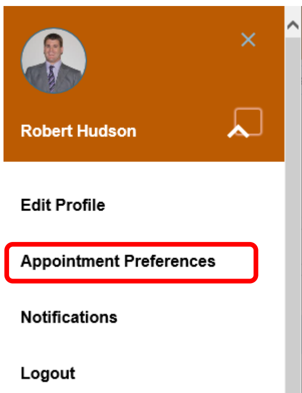
Congratulations! You have now shared your Outlook 365 Calendar with Starfish [Bengal Success Portal, BSP]!

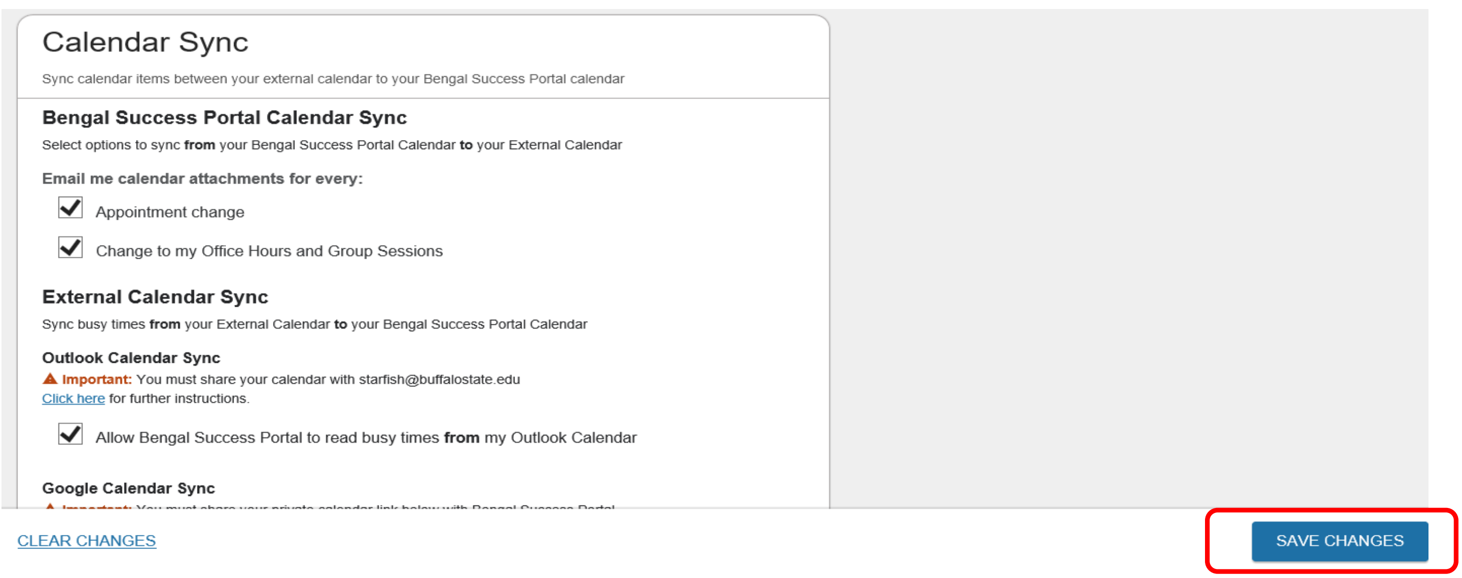
Now you are ready to Sync calendar items between your external calendar to your Bengal Success Portal calendar.😊

Now you are ready to Sync calendar items between your external calendar to your Bengal Success Portal calendar.

1. Log in to your Bengal Success Portal [BSP] using your campus network credentials.

- Click on the hamburger icon
- Click on the down arrow to the right of your name and select **Appointment Preferences**

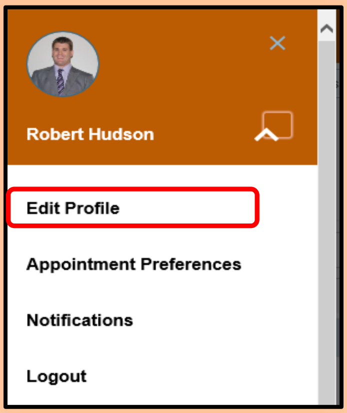




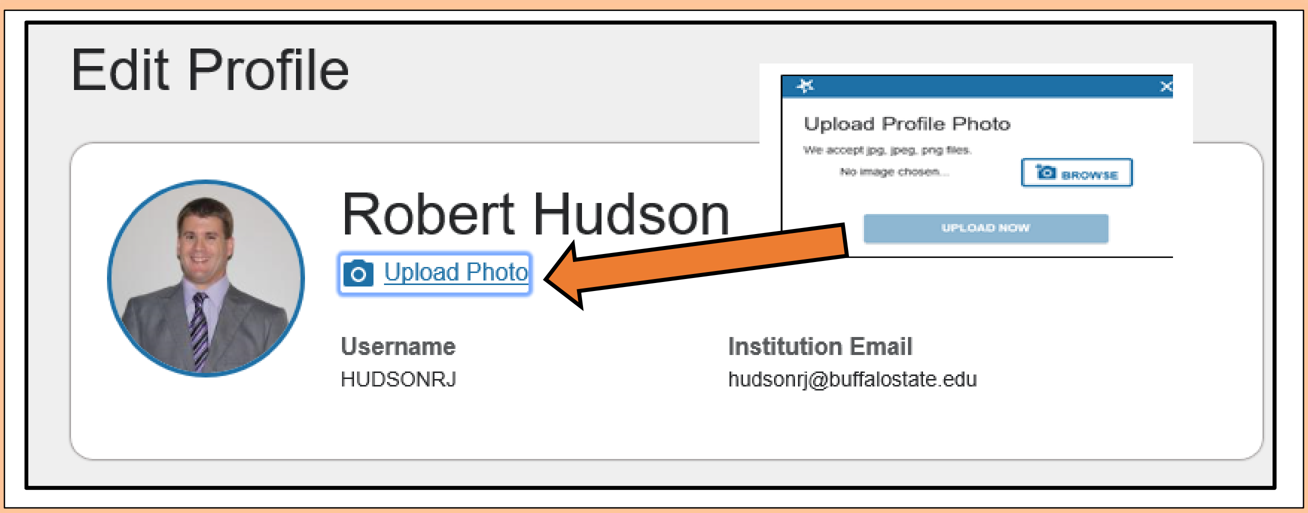
Section 2. Setting up your Profile

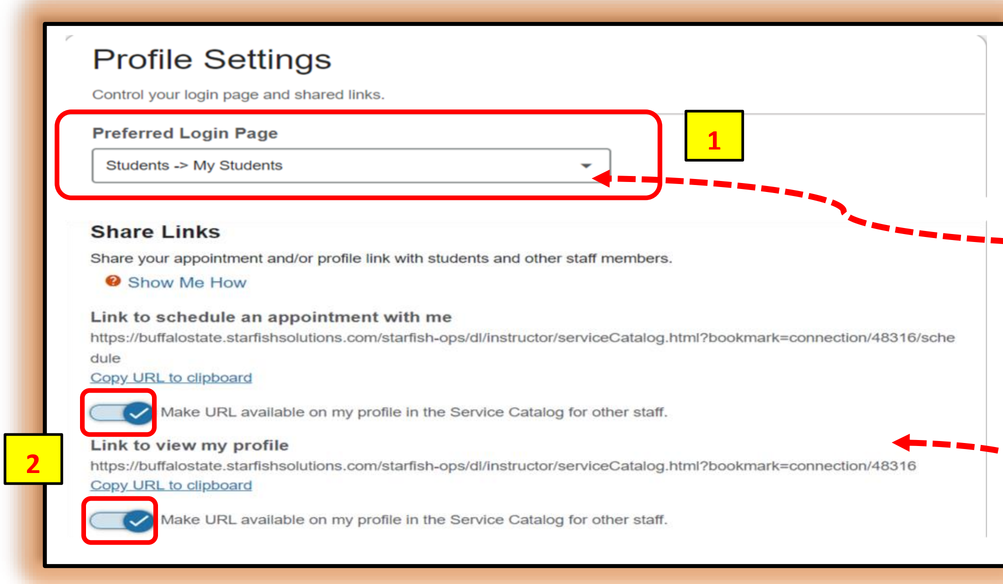
- Setup your Profile – you are encouraged to complete as much as possible as students will see this information.

- Click on the hamburger icon
- Click on the down arrow to the right of your name and select **Edit Profile**



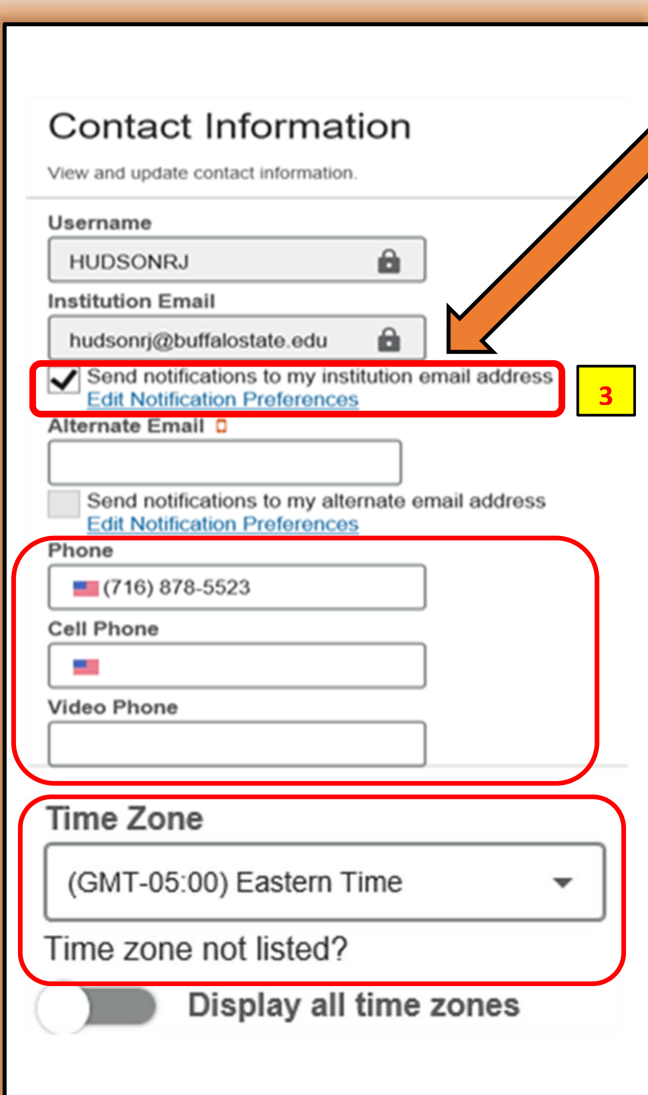
1. Add a photo of yourself



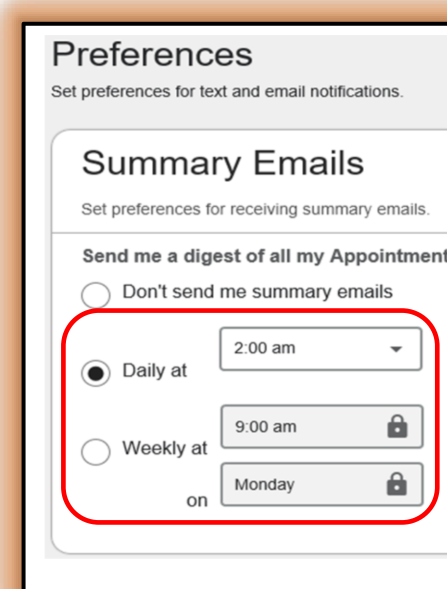


1. By clicking on the down arrow, you can change **your preferred login page**. Your preferred login page is the page your first see when you login to your BSP.

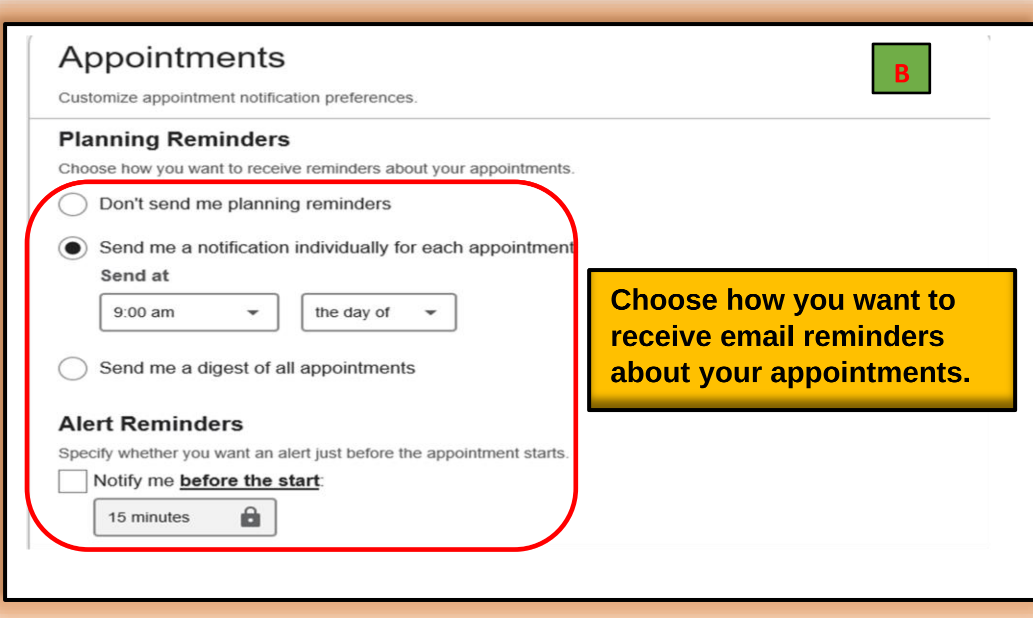
2. Share your appointment & profile link with your students and other staff members.

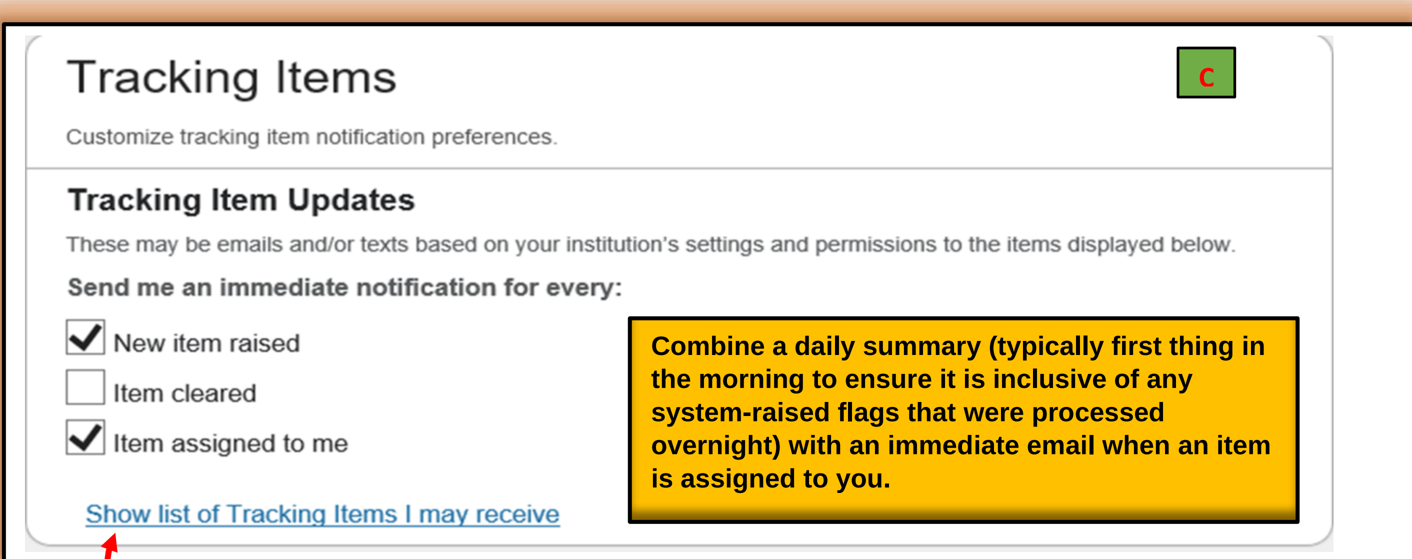


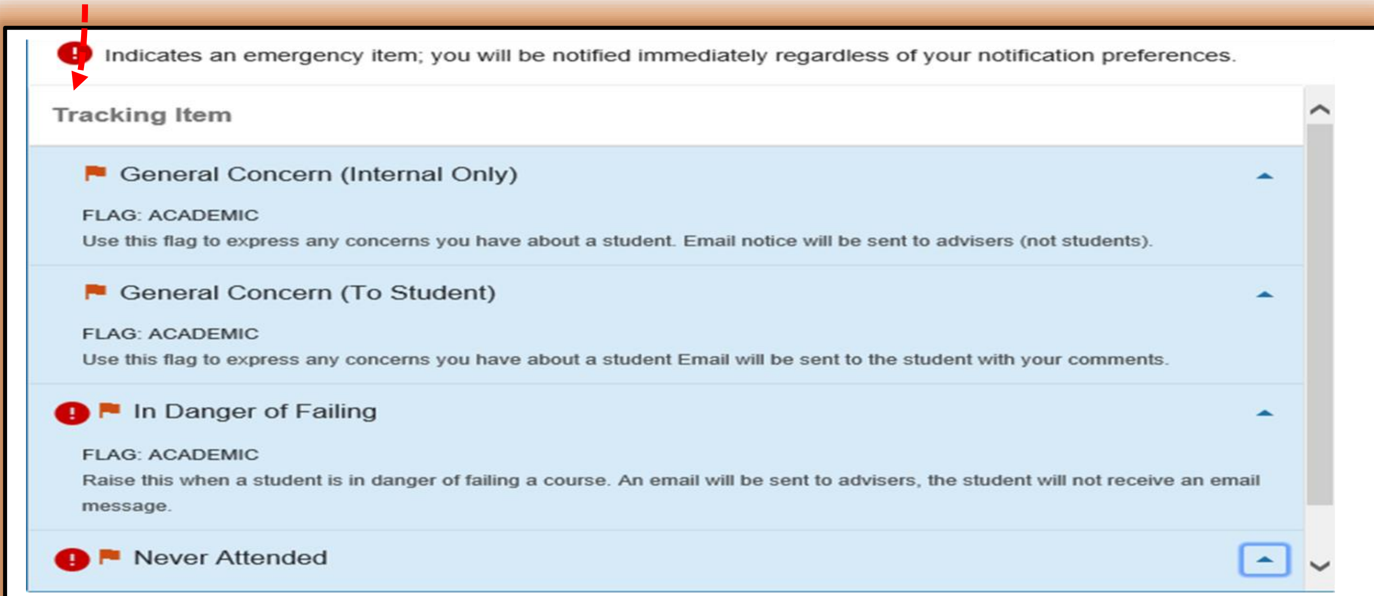
3. Click the **Edit Notification Preferences** link to customize your email notifications. You will receive emails about your BSP activity, such as **appointment reminders** and **tracking item updates**, depending on your settings and your preferences. [See diagrams **A**, **B**, and **C**.]



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).

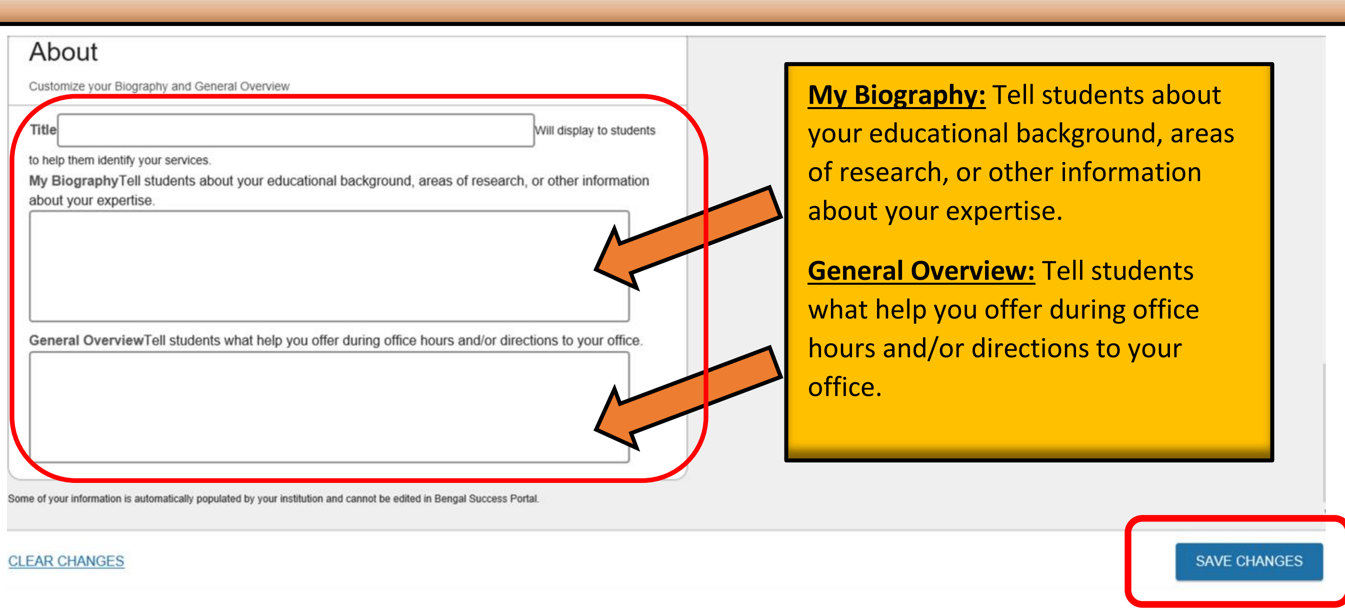

Appointments
B
Customize appointment notification preferences.
Planning Reminders
Choose how you want to receive reminders about your appointments.
Don't send me planning reminders
Send me a notification individually for each appointment
Send at
9:00 am
the day of
Send me a digest of all appointments
Alert Reminders
Specify whether you want an alert just before the appointment starts.
Notify me before the start:
15 minutes
Choose how you want to receive email reminders about your appointments.


Tracking Items
C
Customize tracking item notification preferences.
Tracking Item Updates
These may be emails and/or texts based on your institution's settings and permissions to the items displayed below.
Send me an immediate notification for every:
New item raised
Item cleared
Item assigned to me
Show list of Tracking Items I may receive
Combine a daily summary (typically first thing in the morning to ensure it is inclusive of any system-raised flags that were processed overnight) with an immediate email when an item is assigned to you.


Indicates an emergency item; you will be notified immediately regardless of your notification preferences.
Tracking Item
General Concern (Internal Only)
FLAG: ACADEMIC
Use this flag to express any concerns you have about a student. Email notice will be sent to advisers (not students).
General Concern (To Student)
FLAG: ACADEMIC
Use this flag to express any concerns you have about a student Email will be sent to the student with your comments.
In Danger of Failing
FLAG: ACADEMIC
Raise this when a student is in danger of failing a course. An email will be sent to advisers, the student will not receive an email message.
Never Attended

Please review the Bengal Success Portal [BSP] Tracking Guide for additional information

<u>Important Note on Flag Types:</u> In an effort to reduce redundancy and to increase efficiency, the Bengal Success Portal [BSP] Team asks that you please <u>not</u> create [or raise] multiple flag types for a student with the same concern. For instance, if you raise the **Missing/Late Assignments flag** with a detailed comment of the situation, it is not necessary to also raise the **General Concern (To Student) flag** with the exact same comment. Raising multiple flag types with the same concern and comment may lead to confusion for the student and those who are a part of the student's Success Network.

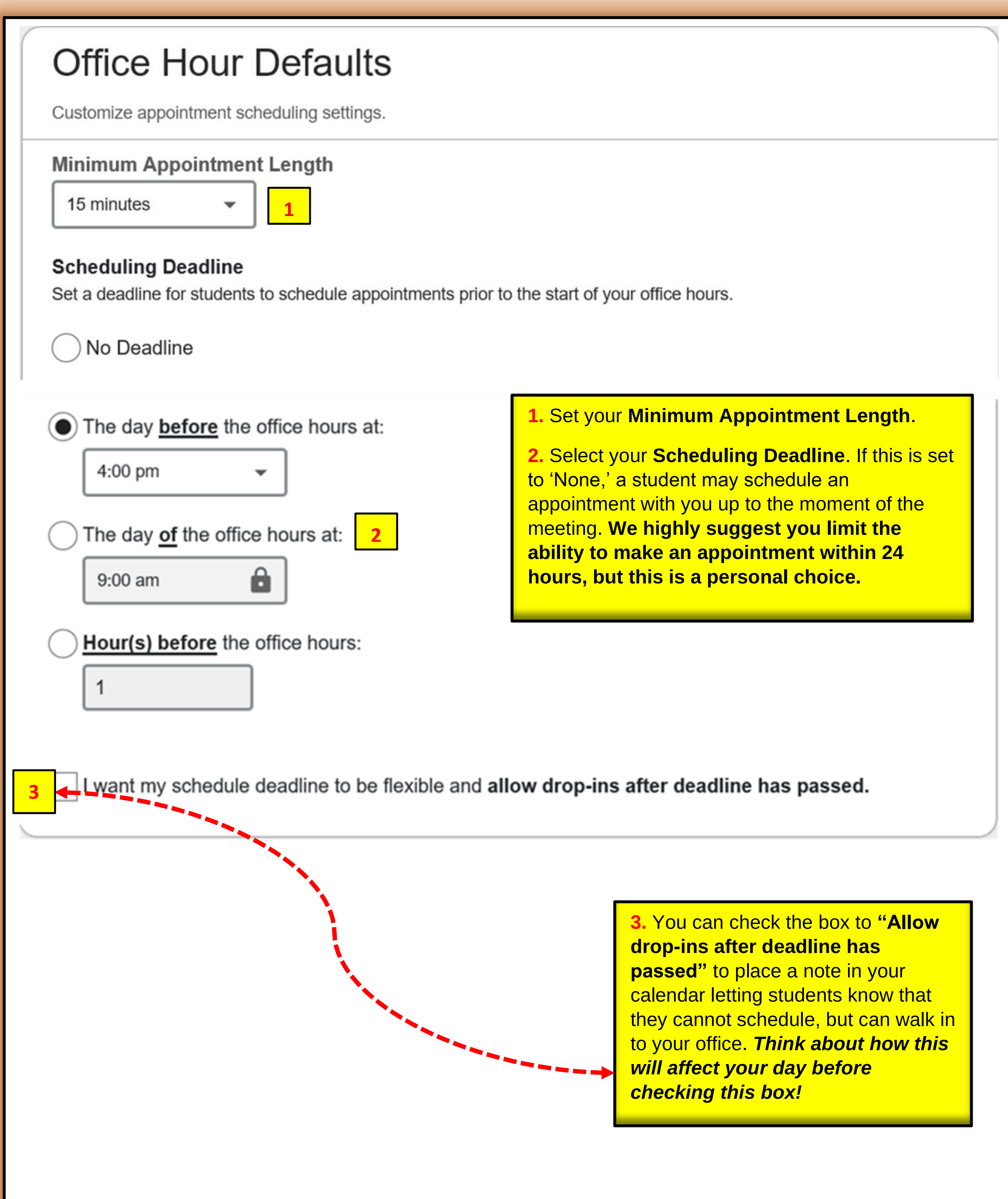


<u>My Biography:</u> Tell students about your educational background, areas of research, or other information about your expertise.

<u>General Overview:</u> Tell students what help you offer during office hours and/or directions to your office.

This is the information that students see when making an appointment with you. A photo and personal information helps students put a face to a name and feel more comfortable reaching out for help.

Appointment Preferences - Customize your appointment default settings, add locations, and designate calendar managers.



Calendar Sync

Sync calendar items between your external calendar to your Bengal Success Portal calendar

Bengal Success Portal Calendar Sync

Select options to sync **from** your Bengal Success Portal Calendar **to** your External Calendar

1

Email me calendar attachments for every:

- [x] Appointment change
- [x] Change to my Office Hours and Group Sessions

External Calendar Sync

Sync busy times **from** your External Calendar **to** your Bengal Success Portal Calendar

Outlook Calendar Sync

⚠ **Important:** You must share your calendar with starfish@buffalostate.edu

Click here for further instructions.

- [x] Allow Bengal Success Portal to read busy times **from** my Outlook Calendar

Google Calendar Sync

⚠ **Important:** You must share your private calendar link below with Bengal Success Portal.

Click here for further instructions.

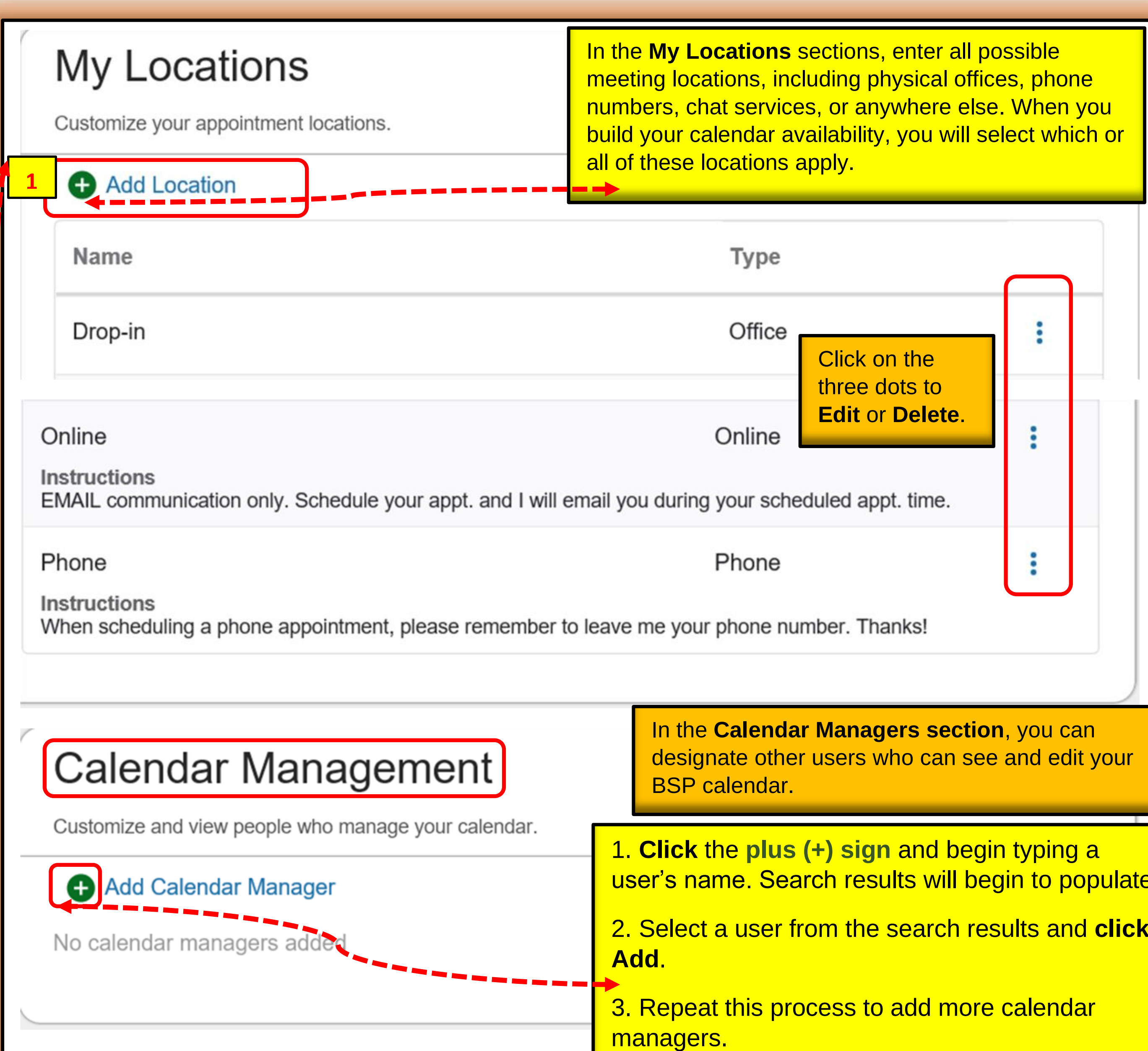
- [ ] Allow Bengal Success Portal to read busy times **from** my Google Calendar

Paste Google Calendar Link

1

Calendar Attachments (Recommended): Option to receive emails with calendar attachments for every change to an appointment and change to office hours/group sessions.

Opting to receive emails with calendar attachments for every change to an appointment and change to office hours/group sessions will guarantee that your Outlook calendar is in sync with your BSP calendar.



In the **My Locations** sections, enter all possible meeting locations, including physical offices, phone numbers, chat services, or anywhere else. When you build your calendar availability, you will select which or all of these locations apply.

Click on the three dots to **Edit** or **Delete**.

In the **Calendar Managers section**, you can designate other users who can see and edit your BSP calendar.

1. **Click** the **plus (+) sign** and begin typing a user's name. Search results will begin to populate.

2. Select a user from the search results and **click Add**.

3. Repeat this process to add more calendar managers.

1

1. **Click the Add Location plus (+) sign**.

2. Select the type of location, the name, and enter any relevant instructions. Students will see this information when scheduling.

3. **Click Save.**

4. Repeat this process to add any additional possible meeting locations.

Section 3. Setting up your Office Hours

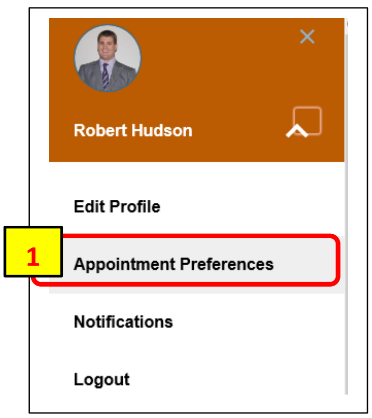
There are two ways to add office hours as described below:

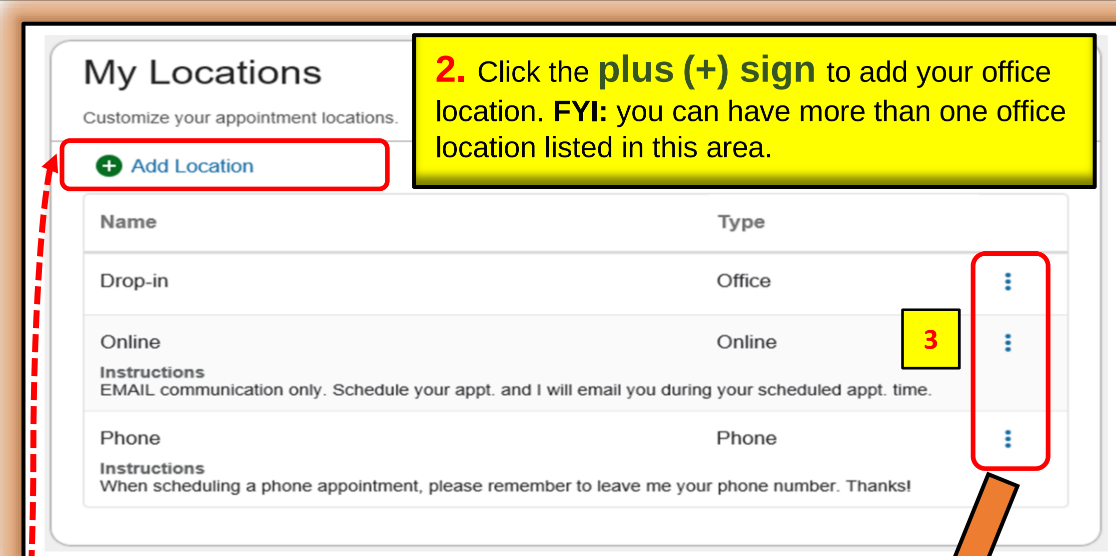
1. Office Hours Set-up Wizard
   - Works best if you have the same office hours each week.

2. Individual Office Hour Set-up
   - Works best if you don't have the same office hours each day.

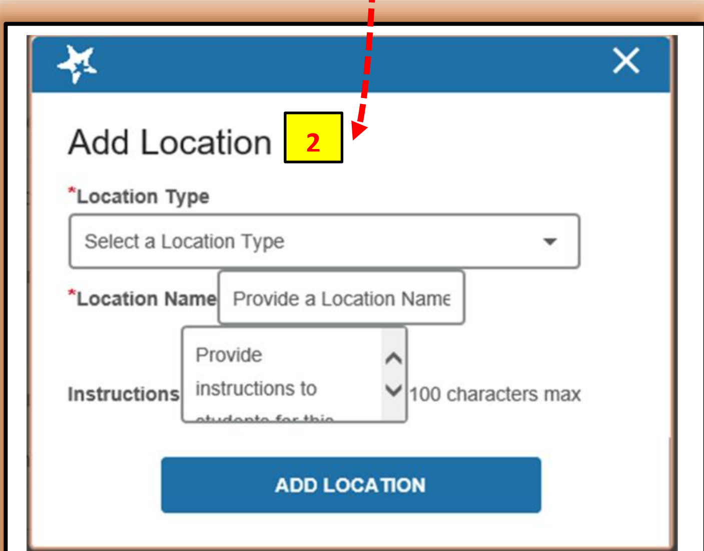
- Click on the hamburger icon
- Click on the down arrow to the right of your name and select **Appointment Preferences**

1. Click on **Appointments Preferences** and scroll down until you see **My Locations**. IMPORTANT: Do this first ***before*** creating your office hours. 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.





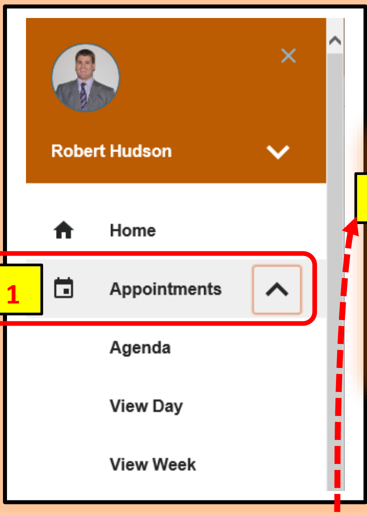
2. Click the **plus (+) sign** to add your office location. **FYI:** you can have more than one office location listed in this area.

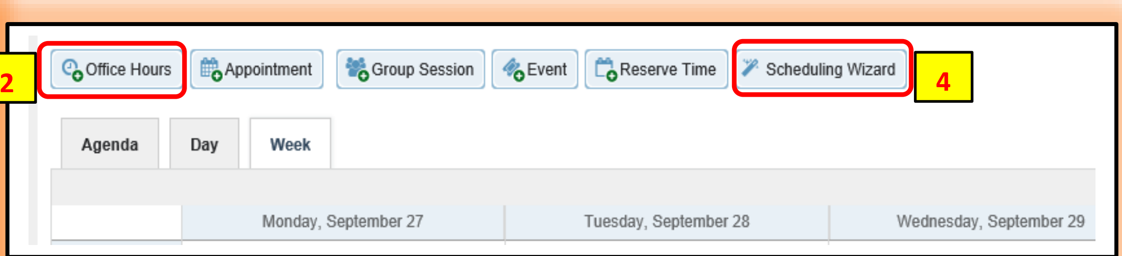


3. Click on the **three dots** to **edit** or **delete** existing location (s).

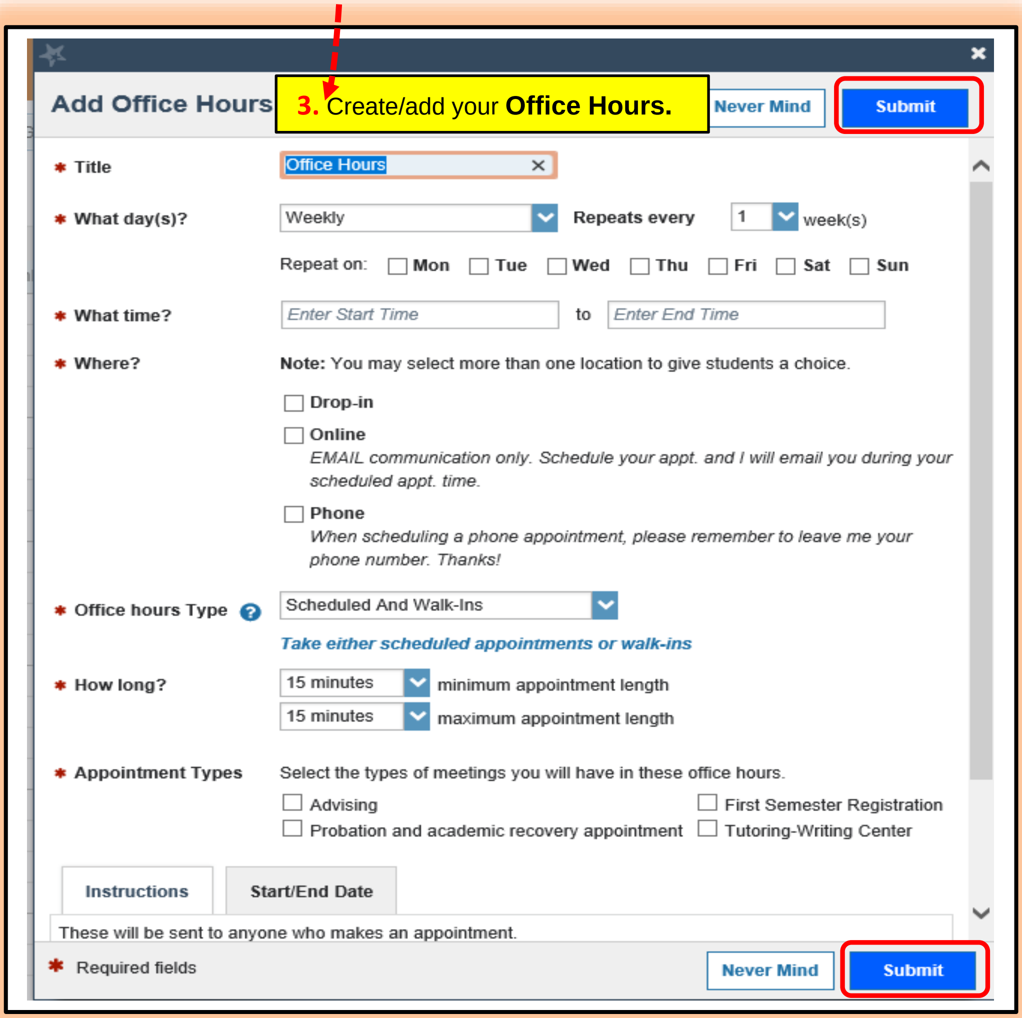
1. Click on **Appointments.**

2. Click on **Office Hours.**





3. Create/add your **Office Hours.** Students can only schedule an appointment at times you indicate are available. There are three ways you can add office hours: (1) use the Office Hours Setup Wizard for quick initial setup, (2) use the Add Office Hours button to add additional blocks at any time, or (3) use the Scheduling Wizard to setup multiple office hour blocks that don't follow a consistent recurrence.



See the Create/add your **Office Hours** details on the very next page.

[Page 14]

Create/add your Office Hours details

1. 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.

2. Select **What day(s)?** and indicate any recurrence (example: Repeats every 1 week).

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

4. **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. To add additional locations options, go to the **Appointments Preference** page of your profile.

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

7. **Select Scheduled and Walk-ins** if you will be using the kiosk/waiting room features, and you plan to take walk-ins between appointments.

8. **Select Scheduled Appointments Only** if you will not take any walk-ins.

9. **Select Walk-ins Only** to show the time as available to students, but disallow anyone from making advance appointments

10. **Select How long?** meetings can be by selecting a minimum and maximum duration. If the minimum and maximum are identical, the student will not be given a choice of duration. Note that institution settings for specific appointment reasons, may override your settings.

11. If your role has permissions 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:

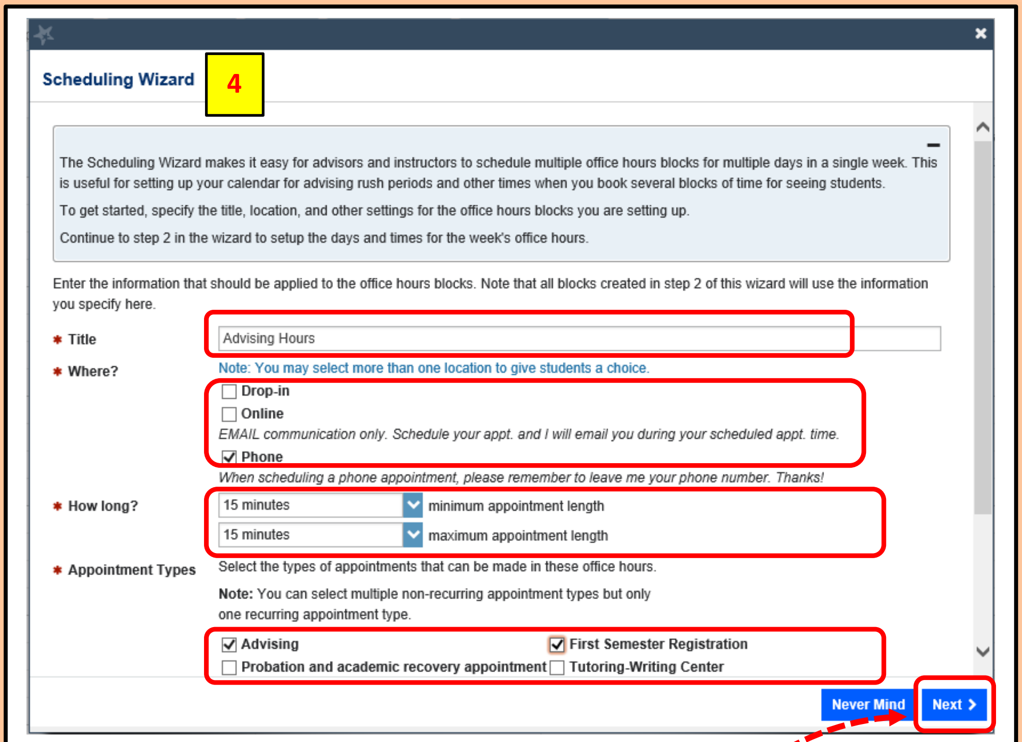
1) which students can schedule during this time (based on the role that connects you),
2) the appointment reasons shown to students,
3) which **Speed Notes** will display, and
4) which roles can view the appointment and its notes.

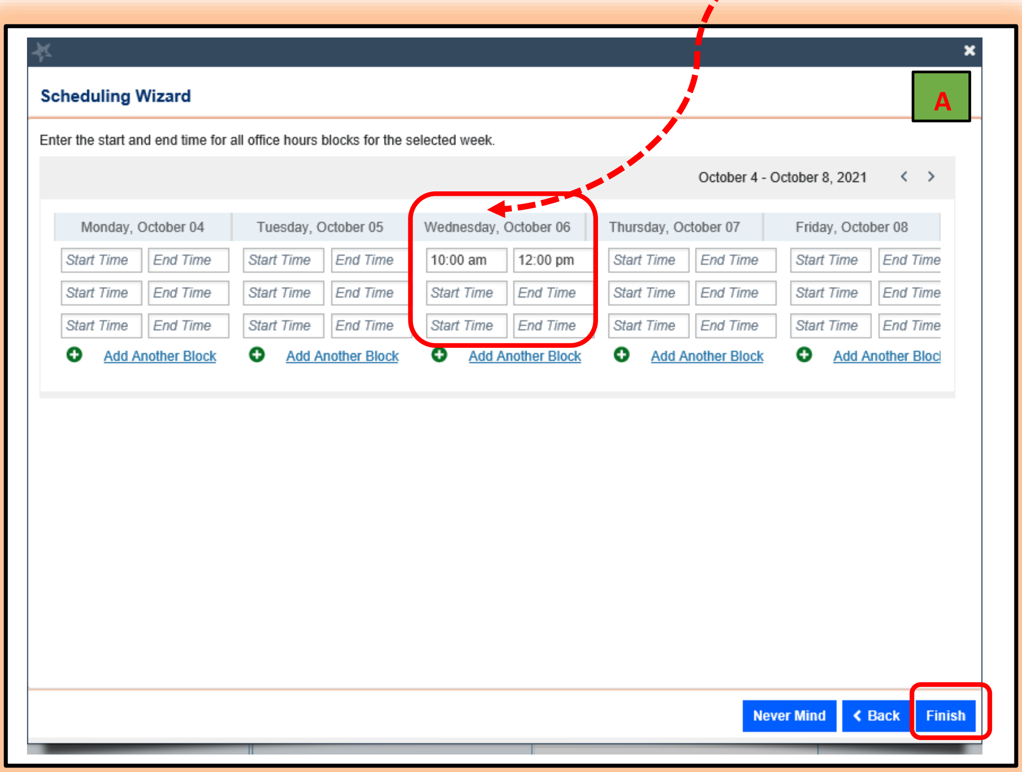
12. Use the Instructions box to enter instructions to students scheduling with you during this block of time. Instructions are required for blocks that allow Walk-ins.

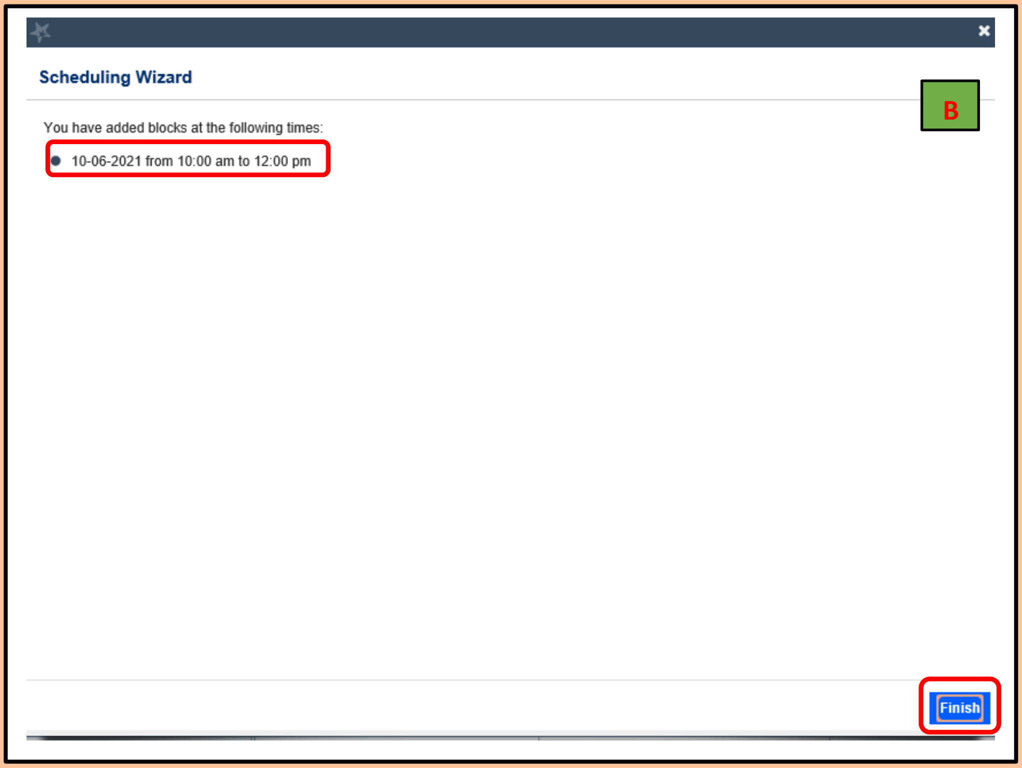
13. Optionally, click the **Start/End Date tab** to set a time frame for a repeating office hour block. For the **End Date**, you may **choose:** Never, End of Term, on a specified date, or after a specified number of occurrences.

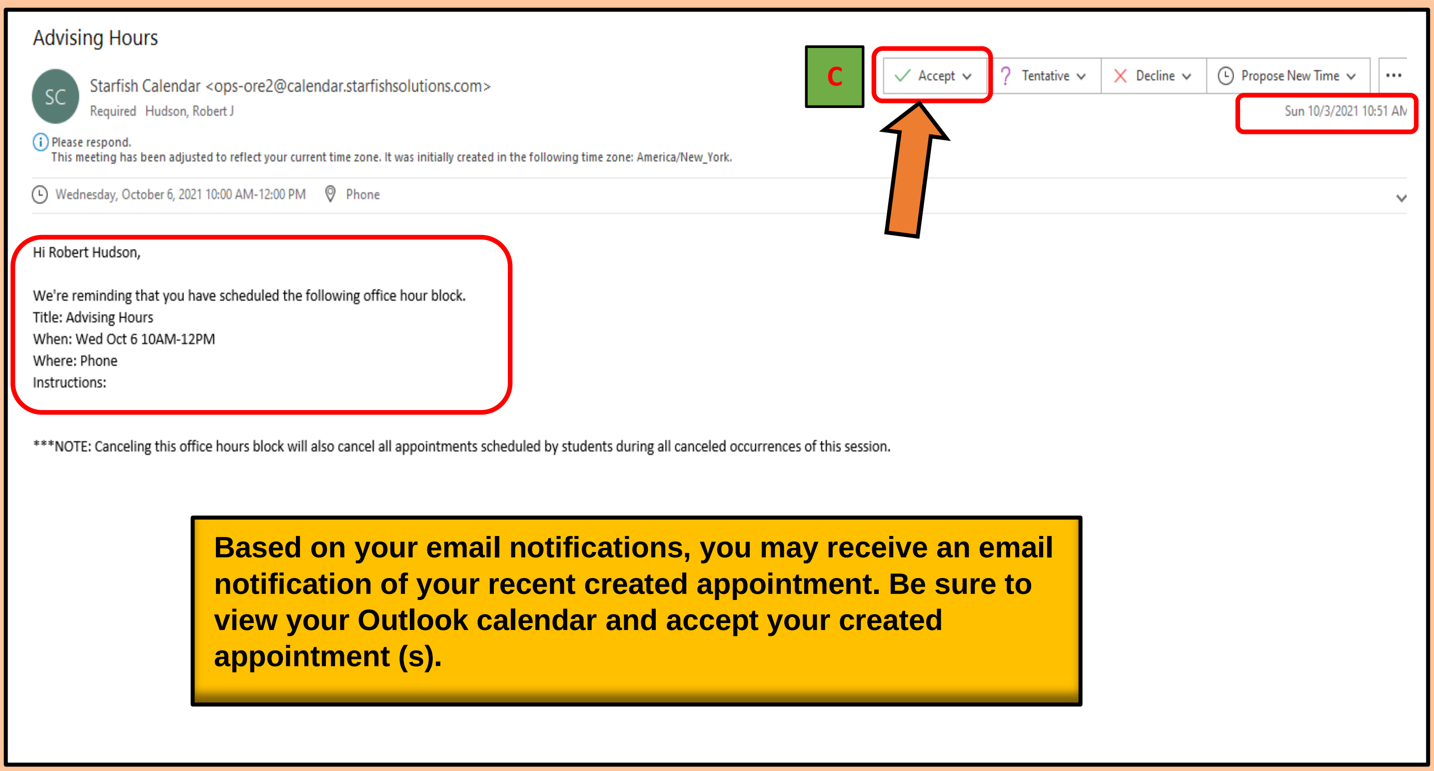
14. Click the **Submit button** at the top or bottom of the Add Office Hours form to save your Office Hour block.

4. <u>Scheduling Wizard.</u> The Scheduling Wizard makes it easy for advisors and instructors to schedule multiple office hours blocks for multiple days in a single week. This is useful for setting up your calendar for advising rush periods and other times when you book several blocks of time for seeing students.

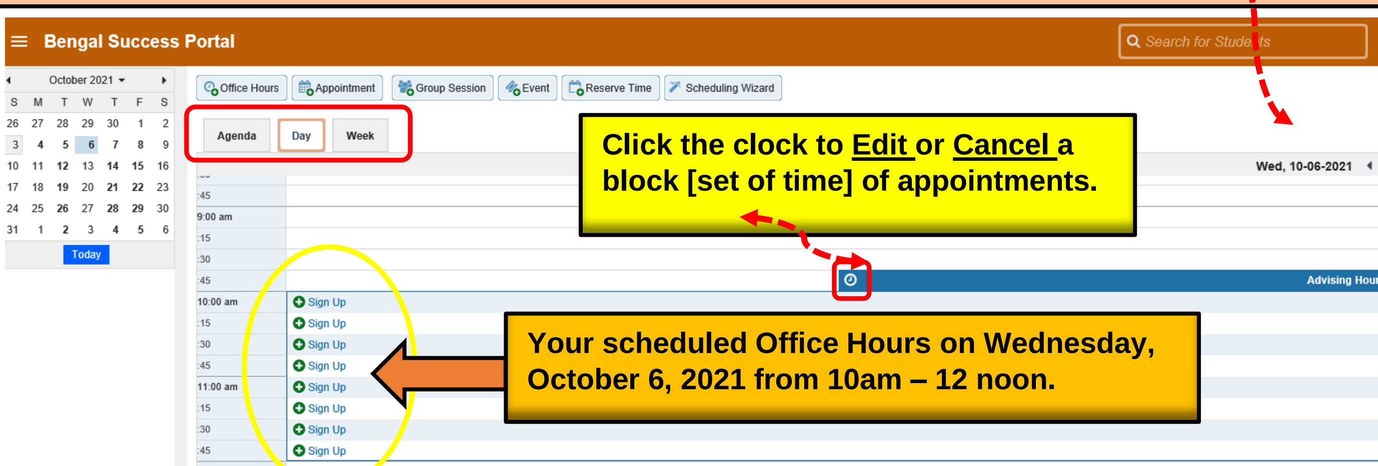





Scheduling Wizard
B
You have added blocks at the following times:
10-06-2021 from 10:00 am to 12:00 pm
Finish

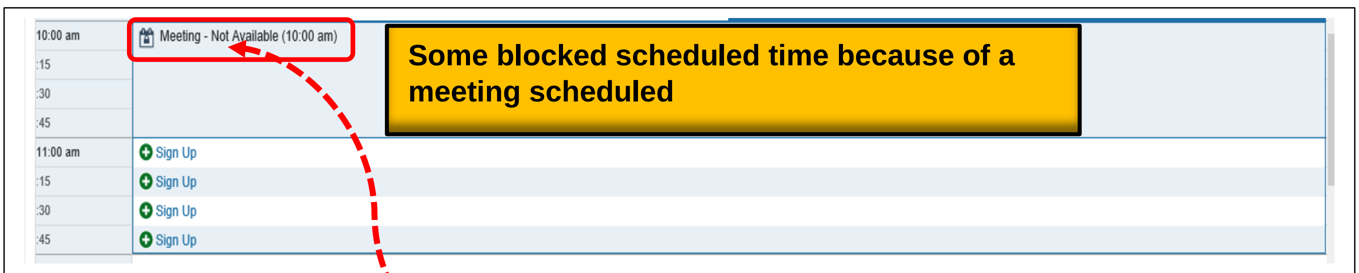

Advising Hours
SC
Starfish Calendar <ops-ore2@calendar.starfishsolutions.com>
Required Hudson, Robert J
C
Accept
Tentative
Decline
Propose New Time
Sun 10/3/2021 10:51 AM
Please respond.
This meeting has been adjusted to reflect your current time zone. It was initially created in the following time zone: America/New_York.
Wednesday, October 6, 2021 10:00 AM-12:00 PM
Phone
Hi Robert Hudson,
We're reminding that you have scheduled the following office hour block.
Title: Advising Hours
When: Wed Oct 6 10AM-12PM
Where: Phone
Instructions:
***NOTE: Canceling this office hours block will also cancel all appointments scheduled by students during all canceled occurrences of this session.
Based on your email notifications, you may receive an email notification of your recent created appointment. Be sure to view your Outlook calendar and accept your created appointment (s).

So, your Office Hours have been created. What does it look like on your BSP Calendar?



Click the clock to Edit or Cancel a block [set of time] of appointments.

Your scheduled Office Hours on Wednesday, October 6, 2021 from 10am – 12 noon.



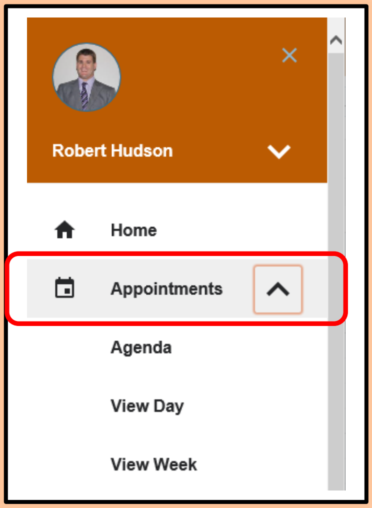
Some blocked scheduled time because of a meeting scheduled

If, after creating your Office Hours, you have a meeting that you have to attend and the meeting is scheduled during your scheduled Office Hour time, you can block out that time through your Outlook calendar. The time blocked out through your Outlook calendar will show in your BSP because Outlook and BSP are shared and synched.

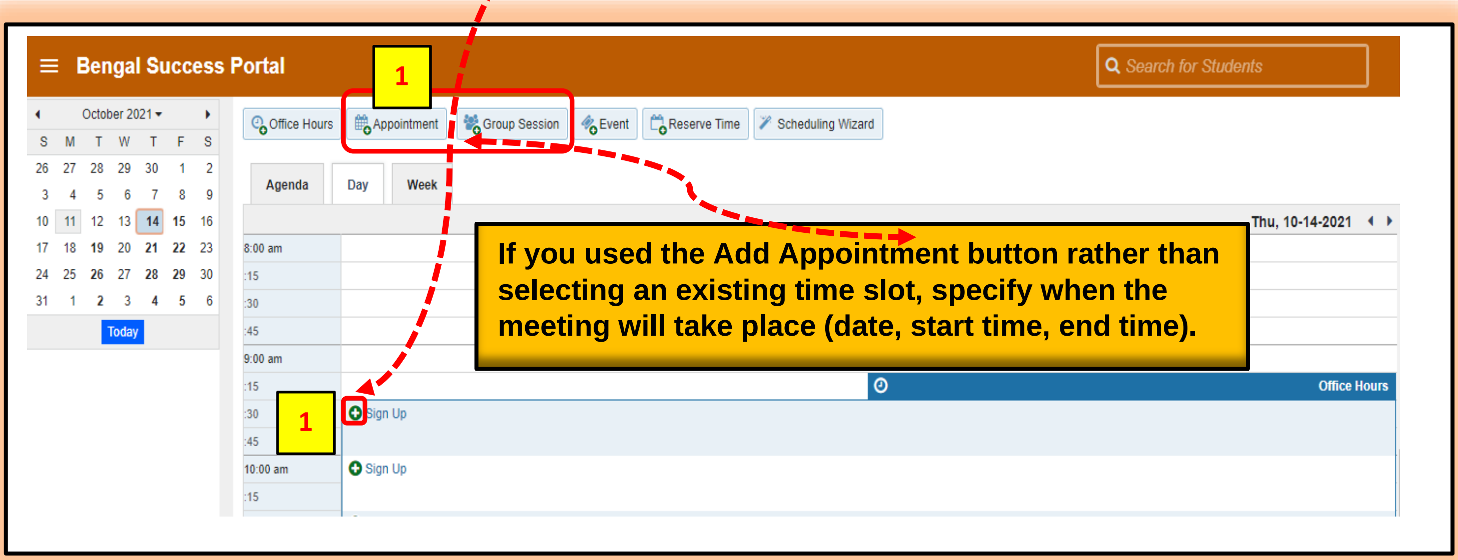
Section 4: Creating a new Student Appointment

Create a new student appointment using either of these options:

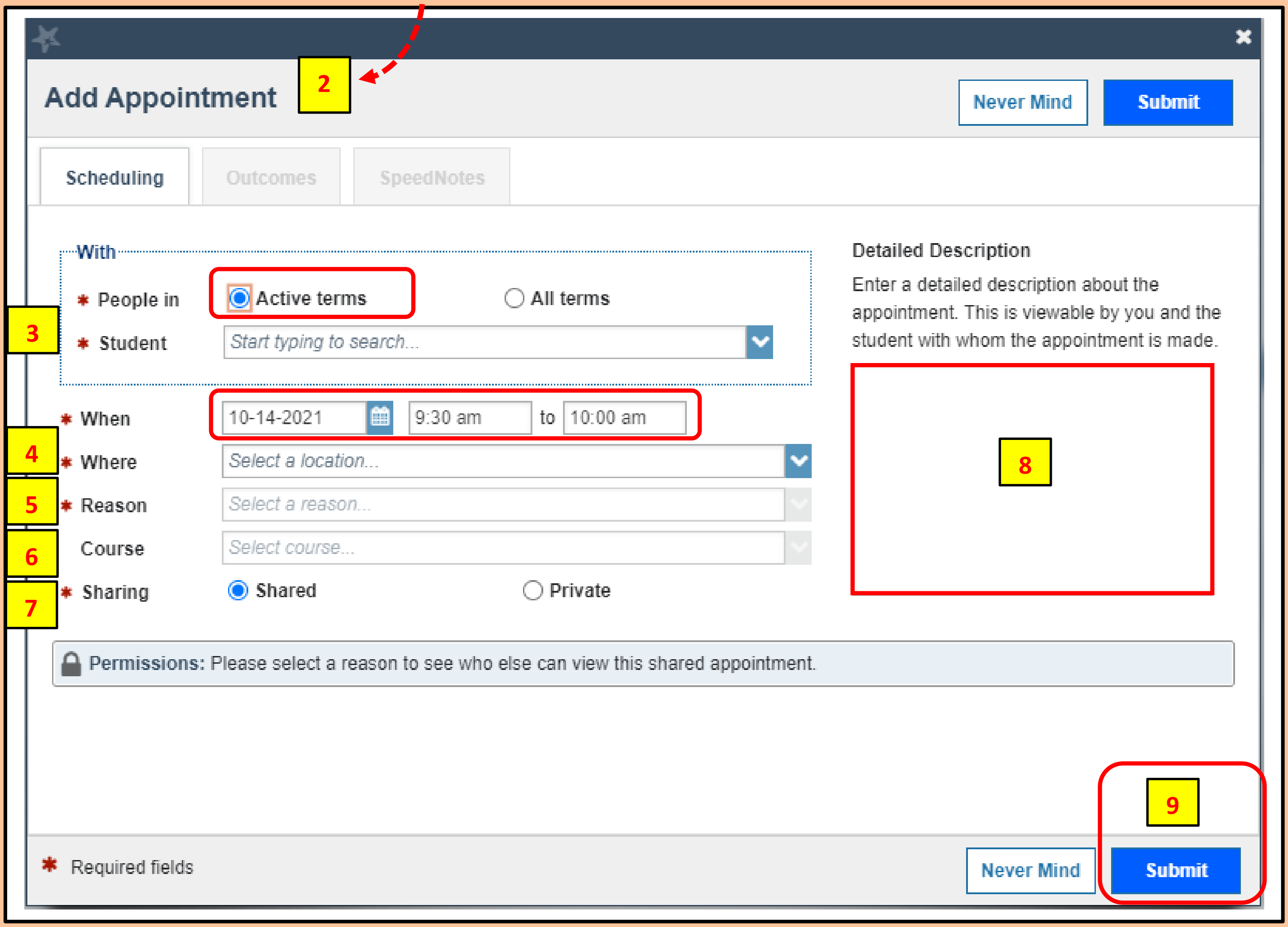
1. Add appointment from your
    A. **Home** page or
    B. **Appointment** page



1. Click the **plus (+) sign** for an existing office hour slot using the **Day** or **Week** view of your calendar on the Appointments page.



2. This opens the **Add Appointment** form.



3. Begin typing **the name of the desired student**. BSP will find matching students with whom you have a relationship. Select the desired student from the list.

4. Select your desired **meeting location.** You must have created your location (s) in your **Appointment Preferences.**

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. **IMPORTANT NOTE:** Each reason is tied to an appointment type. Each appointment type defines which roles may view or modify an appointment of this type, and what **SpeedNotes** will be available. Once you choose a reason, information about which other roles have permission to see the appointment will be shown in the section labeled **Permissions**.

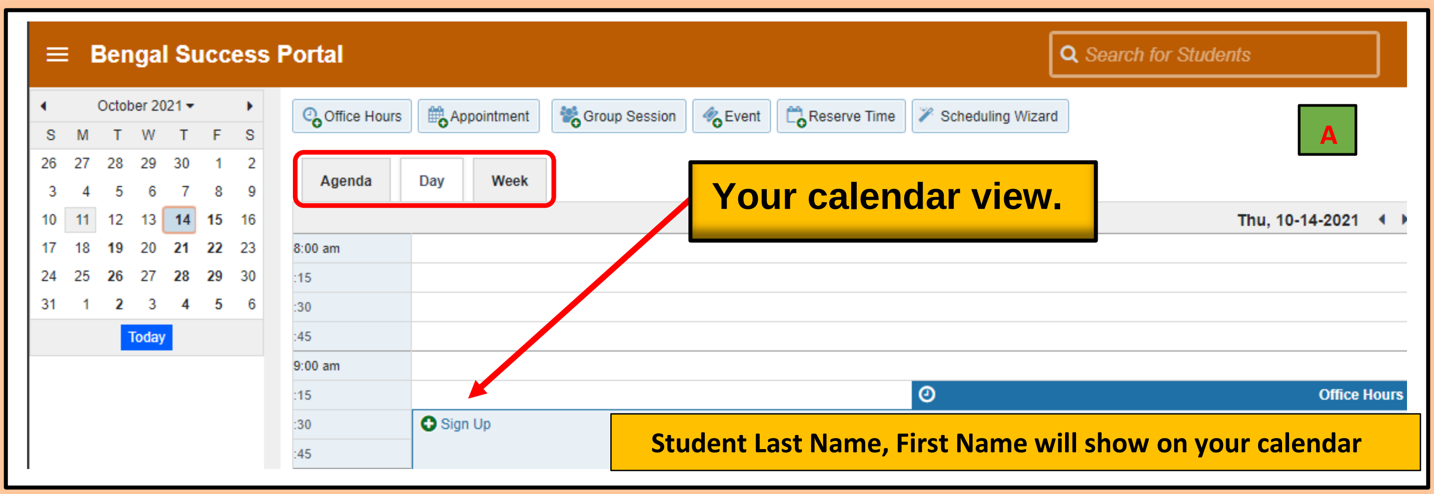
6. If relevant to the meeting and permitted by your role, select a **Course** from the list presented.

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** and **emailed** to you and the student. **Best Practice:** This is optional but recommended to set expectations for the meeting.

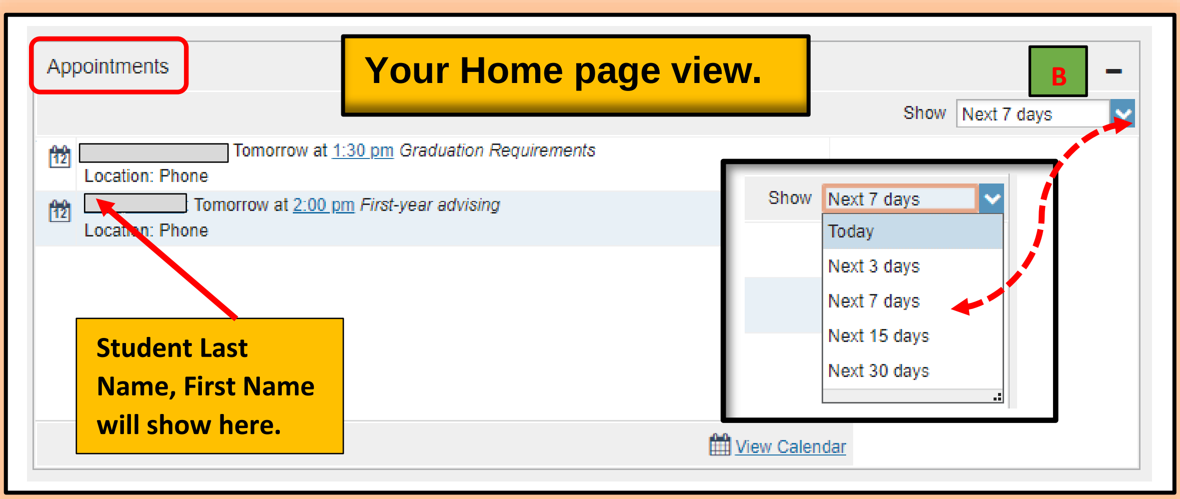
9. 9. Click the **Submit button** to schedule them meeting. The appointment will appear on your calendar in the selected date and time.

Your calendar view: [Diagram A]

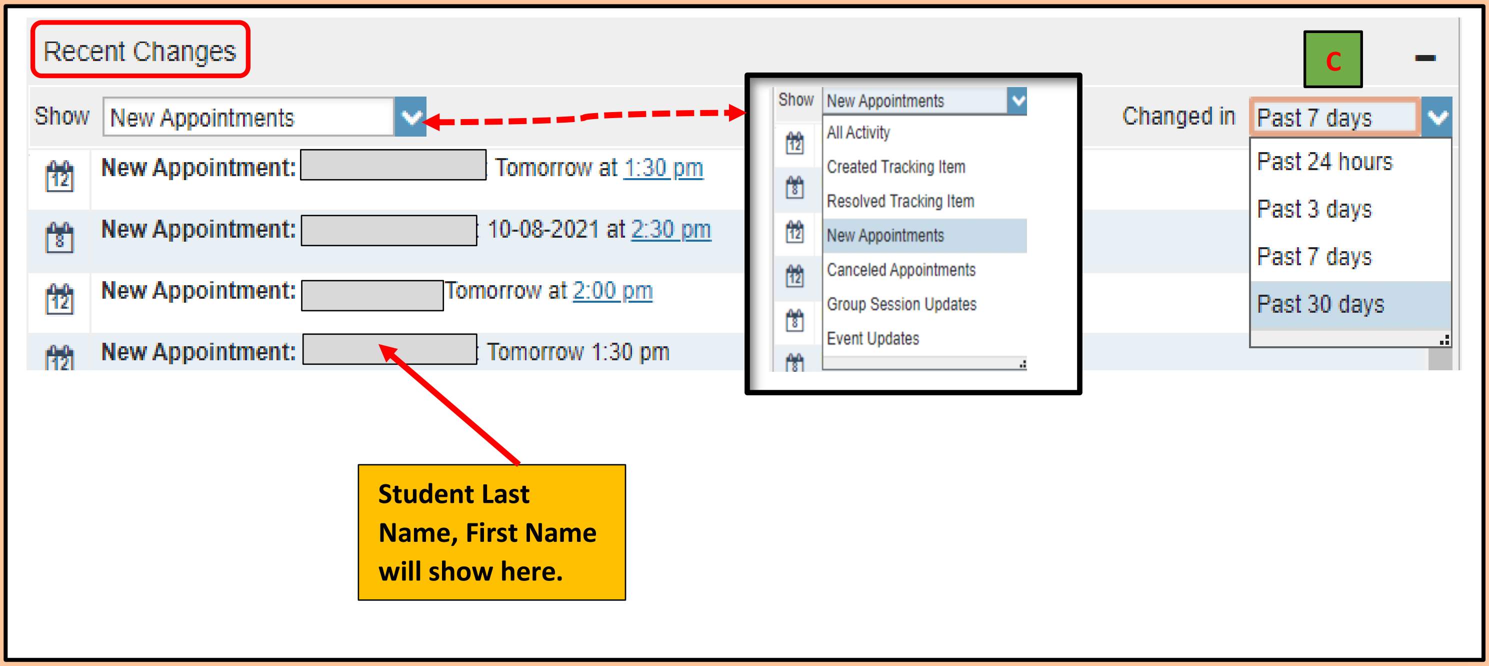


The appointment will also be available from your calendar's **Home page** on the **Appointments** and **Recent Changes view**.

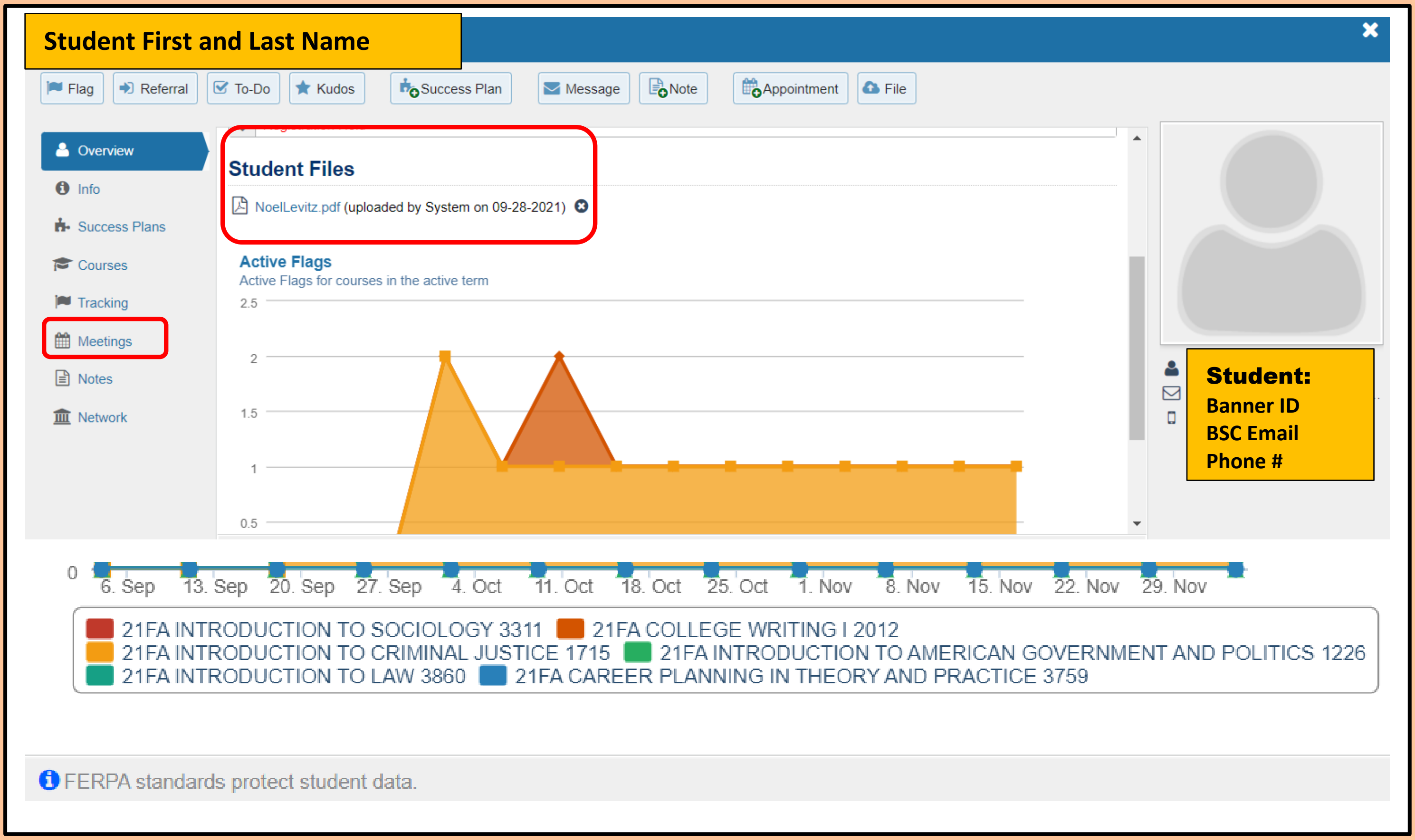
Your Home page view: [Diagram B]

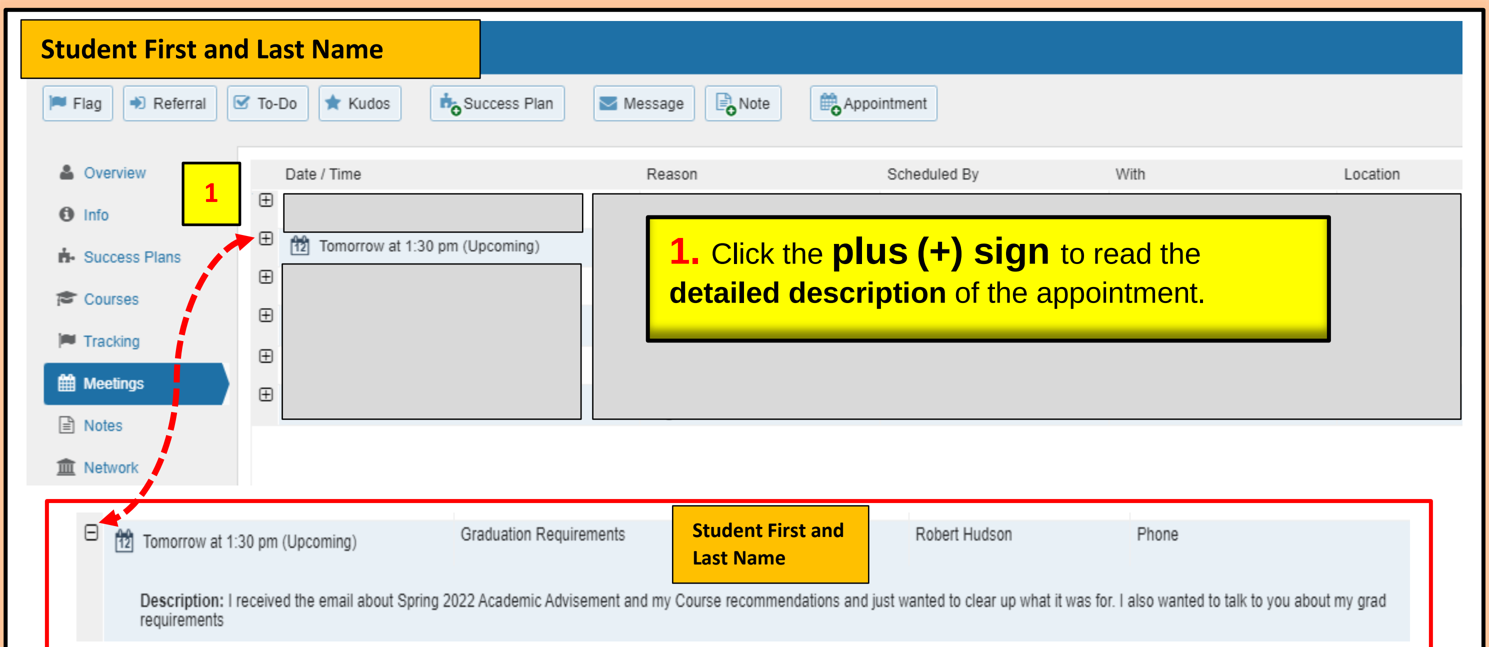


<u>Your Recent Changes view:</u> [Diagram C]



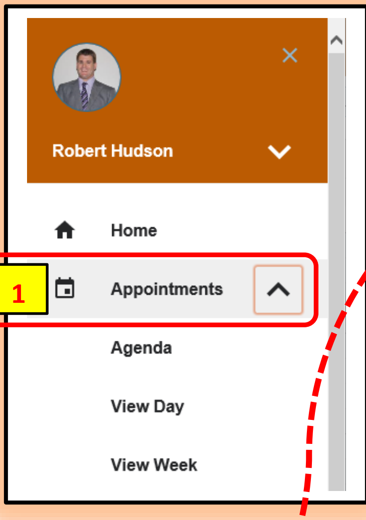
The appointment will also appear on the **Meetings tab** of the student folder for anyone that has permission to view the appointment. If they included a **detailed description**, it will be listed on the Meetings tab.





Both the student and calendar owner will receive an email with an iCal 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.

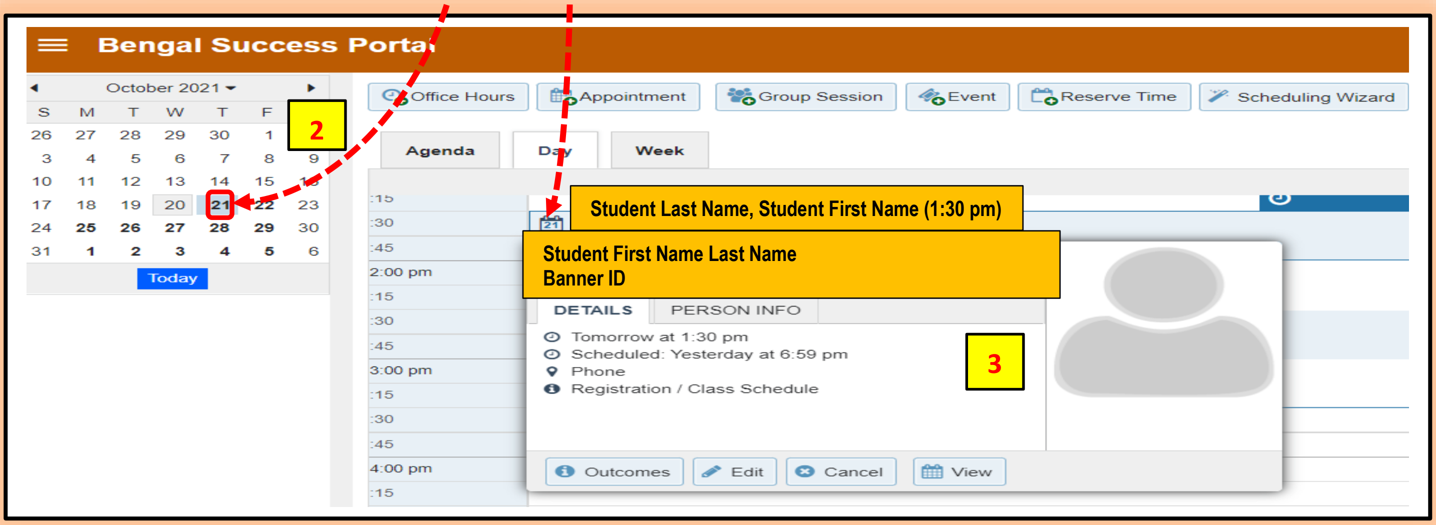
Section 5: How to Modify Scheduling Details for an Existing Appointment?



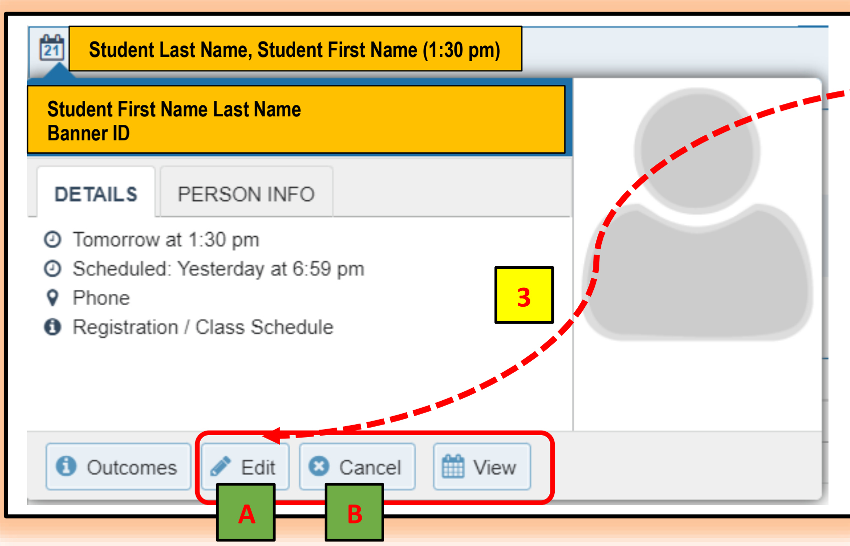
1. Click on **Appointments.**

2. Click on **Date.**

3. Student pop-up card can be viewed. Hover over the **Appointment** icon associated with an appointment to open the pop-up card and make updates. The appointment is available from your calendar, the **Appointments** or **Recent Changes** channels on your **Home** page, or from the student folder **Meetings tab**.



4. Once you hover over the calendar icon, the following **pop-up card** will appear:



From the Appointments pop up card you can edit the scheduling details of an upcoming appointment and add or edit outcome details. You can use SpeedNotes to document common outcomes. You can also cancel an appointment from this menu. Clicking on view will allow you to view your calendar for that day. In this example: October 21st.

A. Editing an Appointment

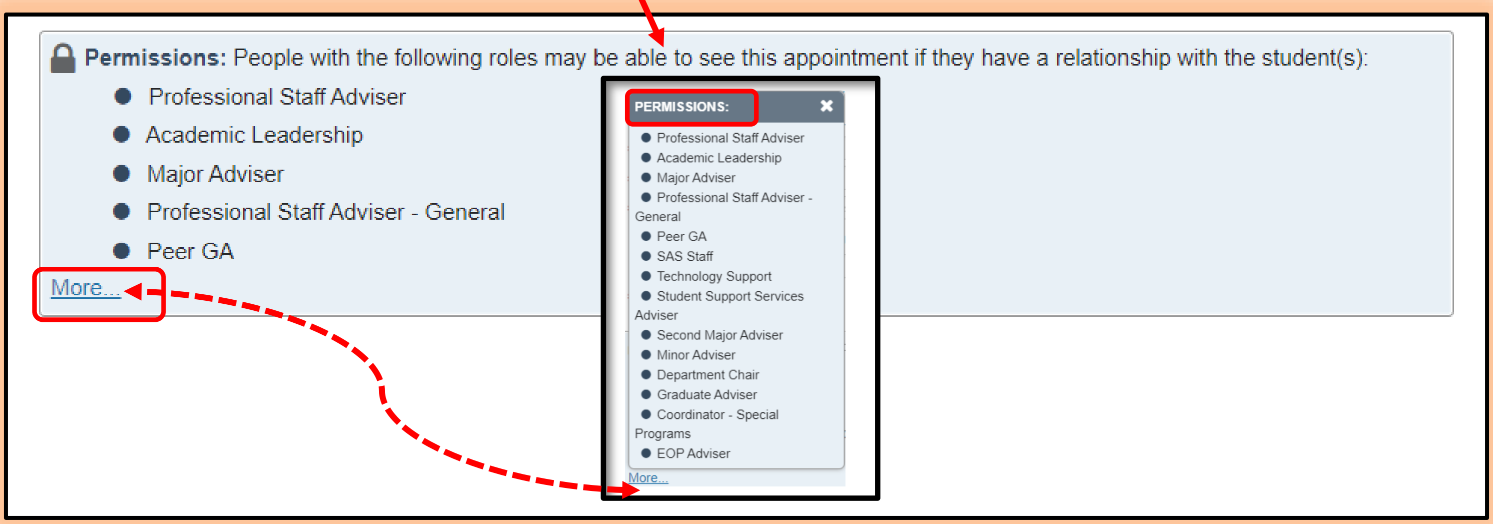
1. Select **Edit** from the **Appointment** pop up card to bring up the **Scheduling** tab of the **Edit Appointment** form. From here, you can edit appointment scheduling details including:

- **When** and **Where** the meeting will occur.

- The **Reason** associated with the meeting.
  Note: This may impact who else can view the meeting, and which SpeedNotes will be available for documenting outcomes.

- The **Course** associated with the appointment. (optional)

- The **Sharing** setting for the meeting. Select private if only you, your calendar manager and the student should see this meeting. A shared meeting will be visible to those with a role that has access to the appointment type and a relationship to the student. These roles are noted in the **Permissions** section of the form.



- **Detailed Description** that is shared with the student and documented on the Meetings tab of the student folder (optional but recommended).

Click the **Submit button** to save changes.

An updated iCalendar (iCal) attachment will be emailed to the student. The calendar owner will also receive the updated iCal if the calendar owner's **email notifications preferences** are set to notify when changes are made to an existing appointment (recommended).

B. Cancelling an Appointment

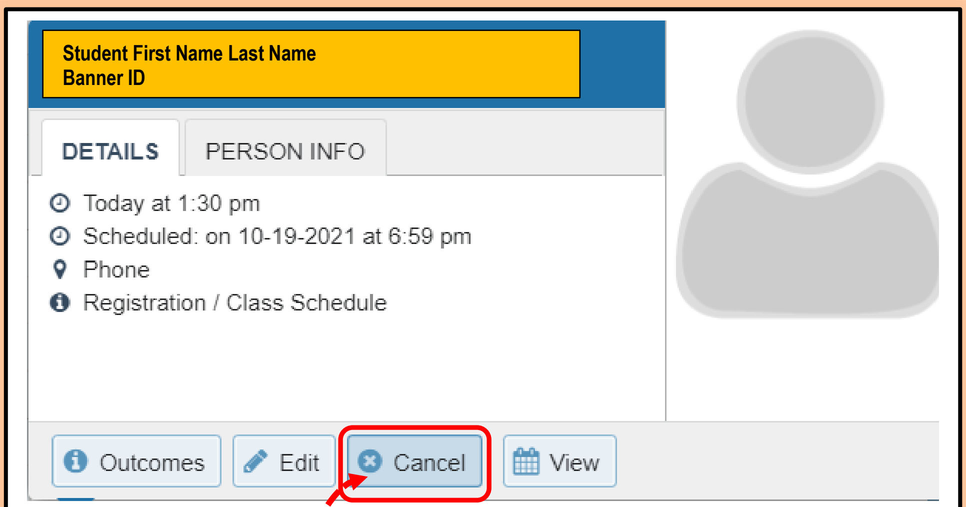
1. Hover over the appointment menu icon associated with an appointment to bring up the **Appointment** pop up card. The Appointment pop up card is available from your calendar, the **Appointments** or **Recent Changes** channels on your **Home** page, or from the student folder **Meetings** tab.

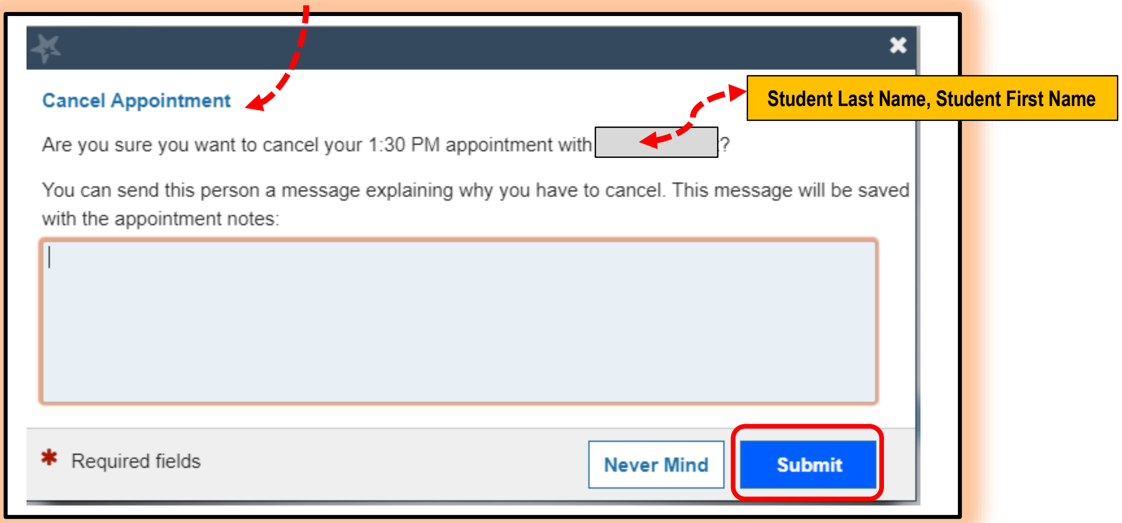
You can also edit an existing appointment from this menu.

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).

Best Practice: Include an explanation for the cancellation and provide guidance on how to reschedule or connect to other available resources.





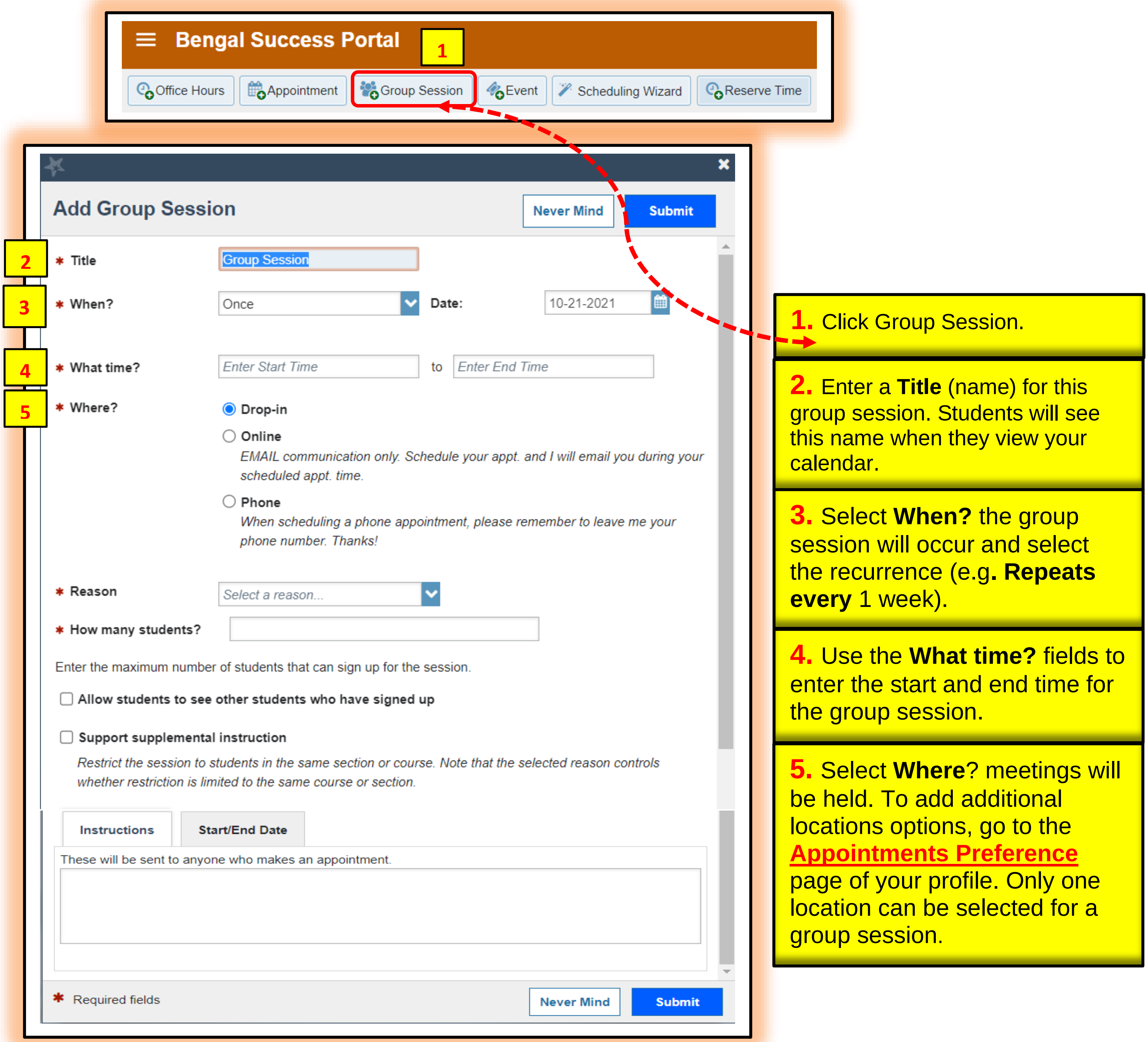
4. Click the **Submit** button to cancel the appointment and send a cancellation email (and iCal attachment) to the student.

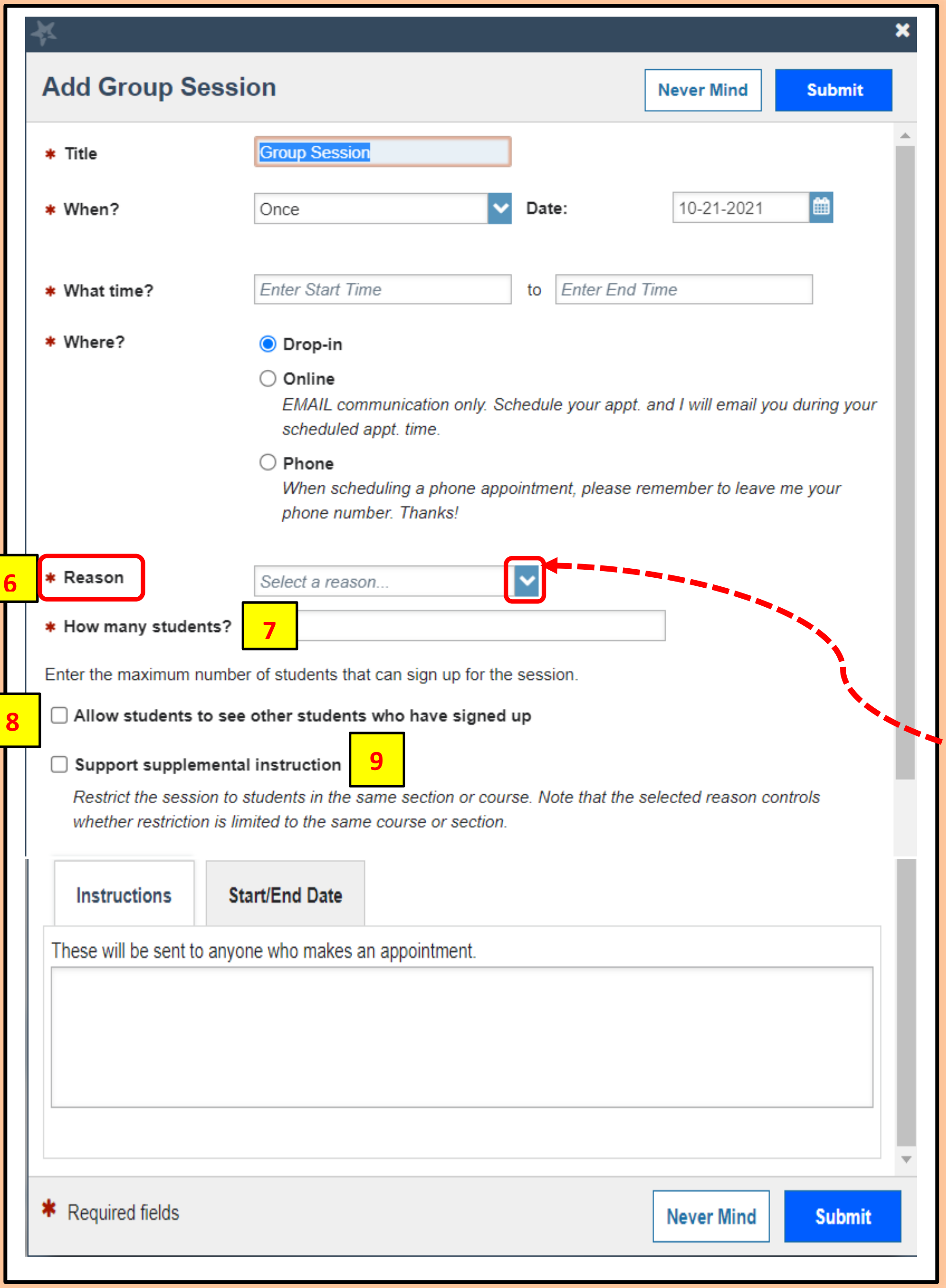
The calendar owner will also receive the iCal for the cancellation if the calendar owner's **email notifications preferences** are set to notify when changes are made to an existing appointment (recommended).

How To Add a Group Advising Session

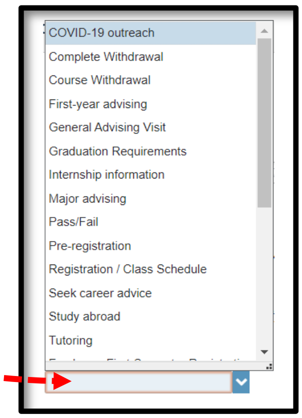
Group sessions allow you to create blocks of time in which a specified number of students can meet with you as a group.

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





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 BSP administrator.

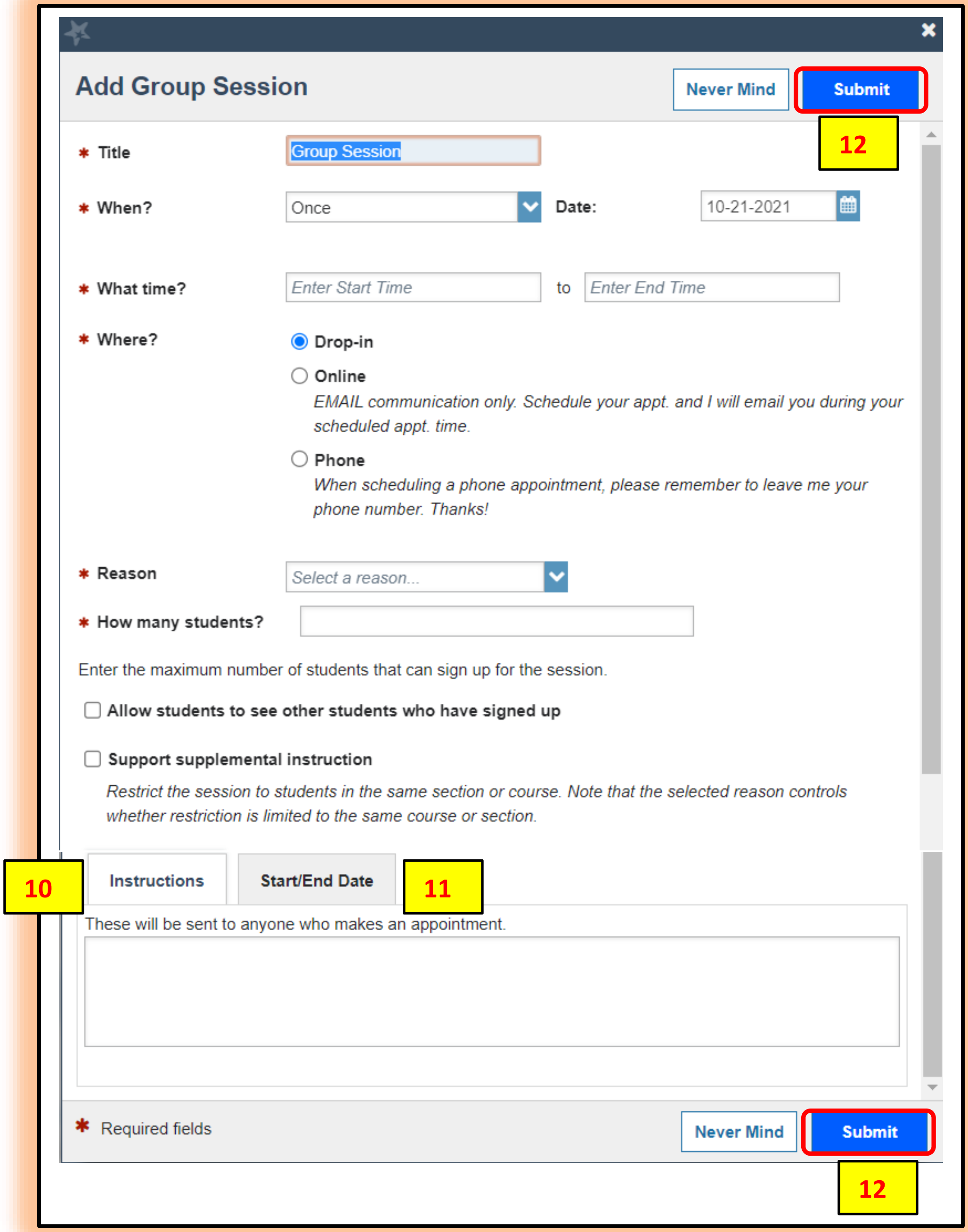


7. Enter **how many students** (maximum) can sign up for the session.

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.

9. Important Note: The **supplemental instruction option** is most often used with Tutoring Service Calendars. The restriction may be either course or course section based (e.g. restricted to Biology 101 students, or to Biology 101, section 02 students). This depends on options your BSP Administrator set for the appointment type associated with your group session reason. Contact your BSP Admin to learn more about this option.



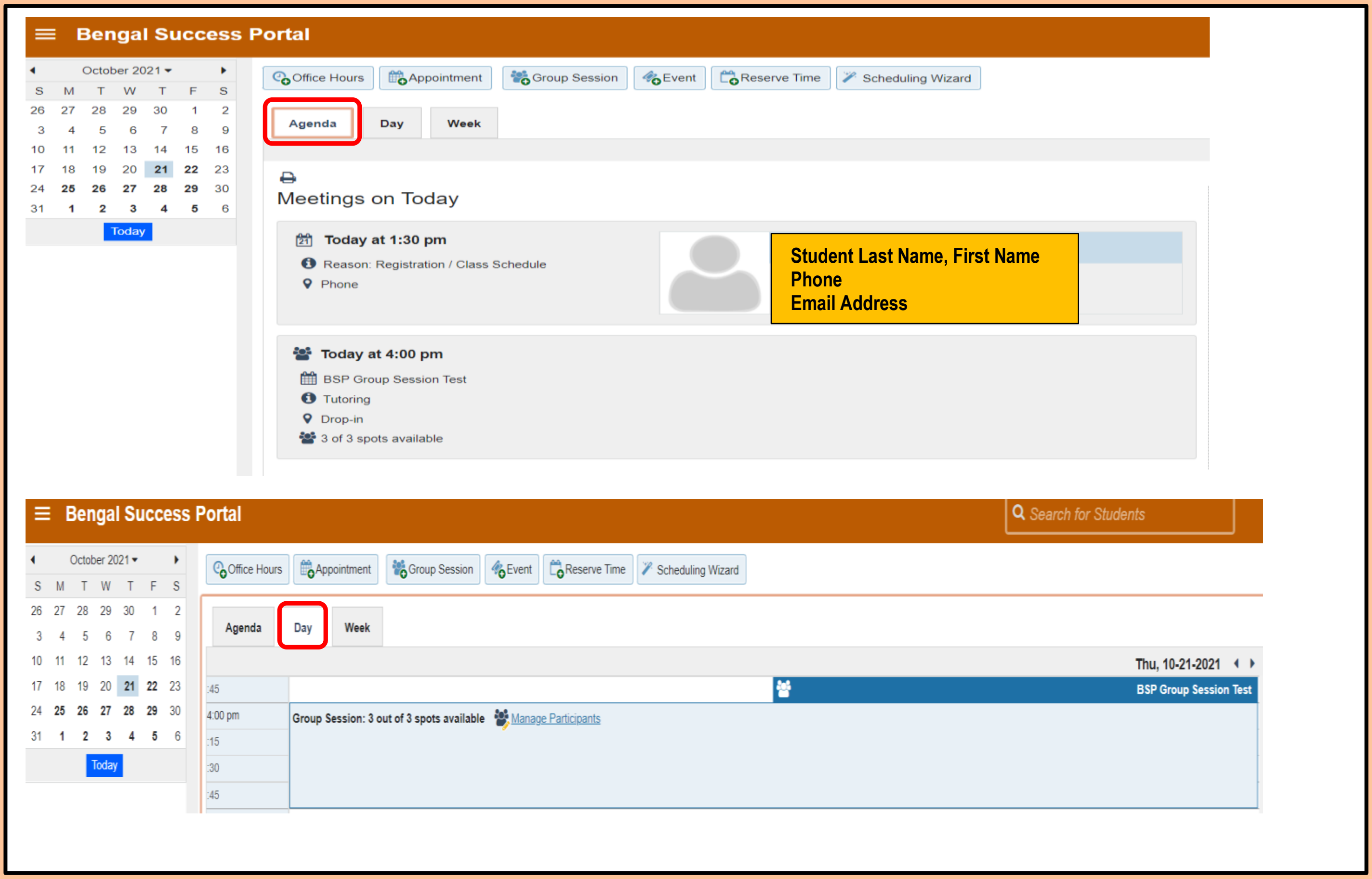
10. Use the **Instructions** box for information that should be shared with students who sign up.

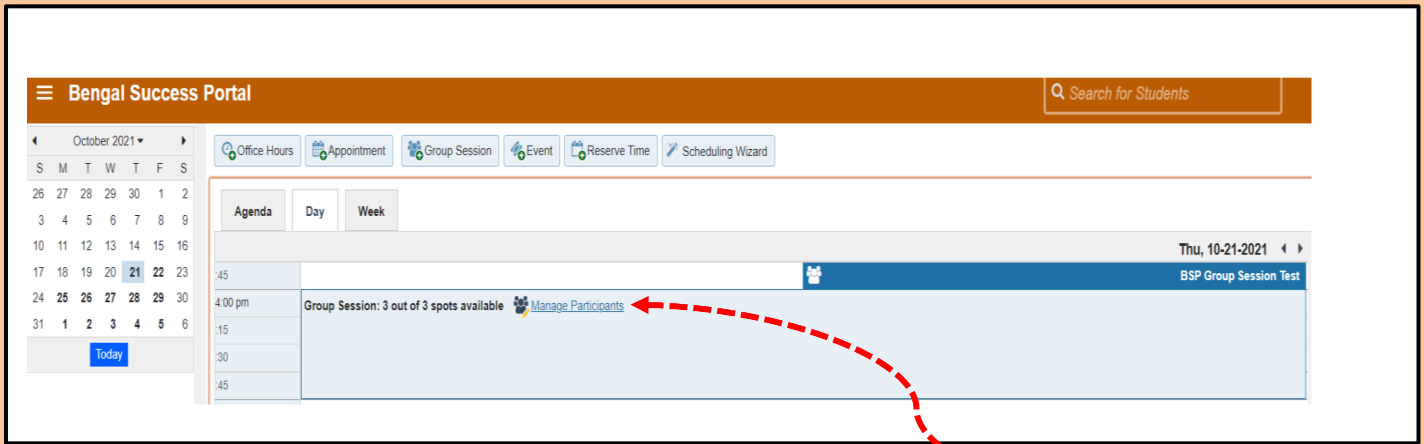
11. Click the **Start/End Date** tab to designate a time frame for the group session if it recurs (as set in step 3 above). For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences.

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

How to Edit or Cancel a Group Session

Existing group sessions will display on your **Agenda** tab within the **Appointments** section of BSP or as a calendar item on the **Day** tab for the specified date of the event.

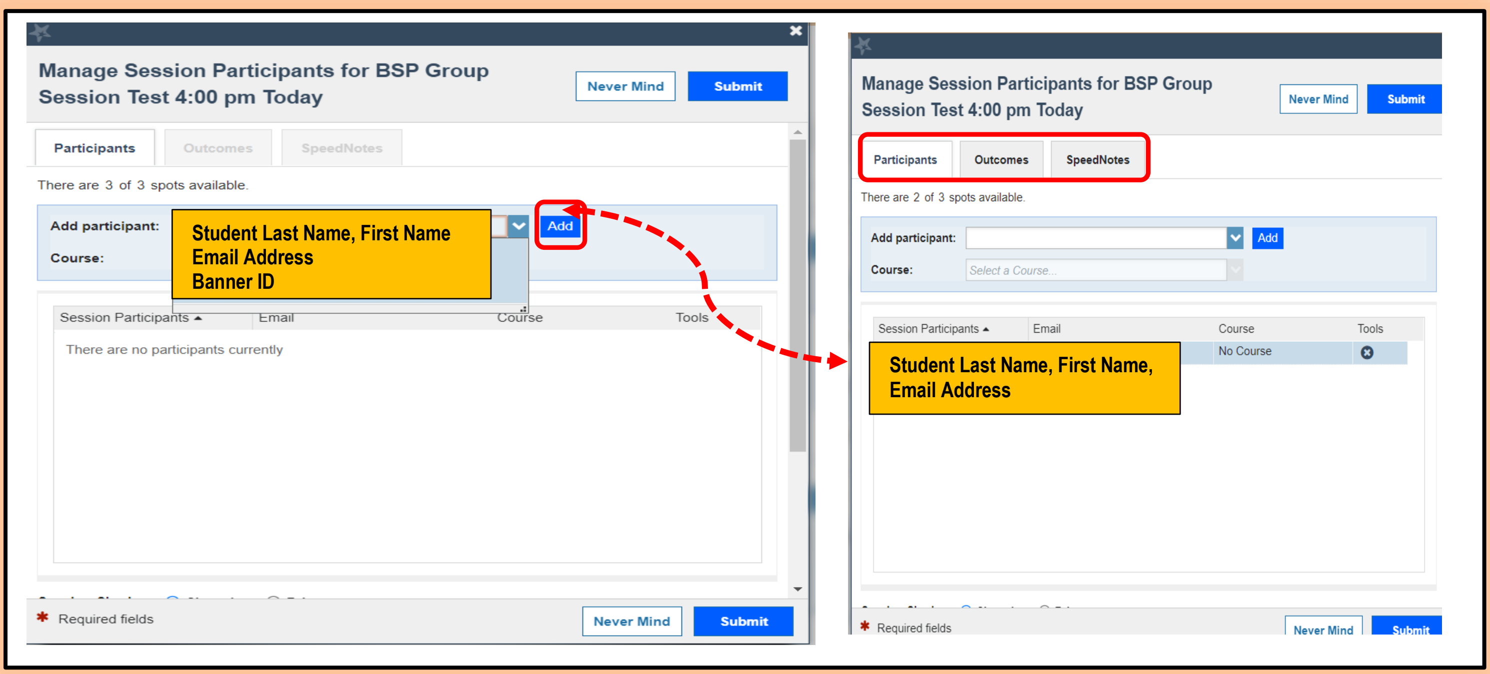




You can add or remove participants in an individual group session using the **Manage Participants** link on the **Day** view of the group session.

1. Select **Manage Participants.**

2. Search for a student by typing his/her name into the **Add participant** field, then click the **Add** Button. Repeat process for each student.




Manage Session Participants for BSP Group Session Test 4:00 pm Today
Never Mind
Submit
Participants
Outcomes
SpeedNotes
There are 2 of 3 spots available.
Add participant:
Add
Course:
Select a Course...
Session Participants
Email
Course
Tools
Student Last Name, First Name, Email Address
No Course
Cancel Occurrence
To remove a participant, click the delete icon (x) associated with the student's name under the Tools column
When you are finished with your participant updates, click the Submit button (top or bottom) to save your changes.
Required fields
Never Mind
Submit

Section 6: Documenting Student Interactions - Documenting Notes - Post Meeting

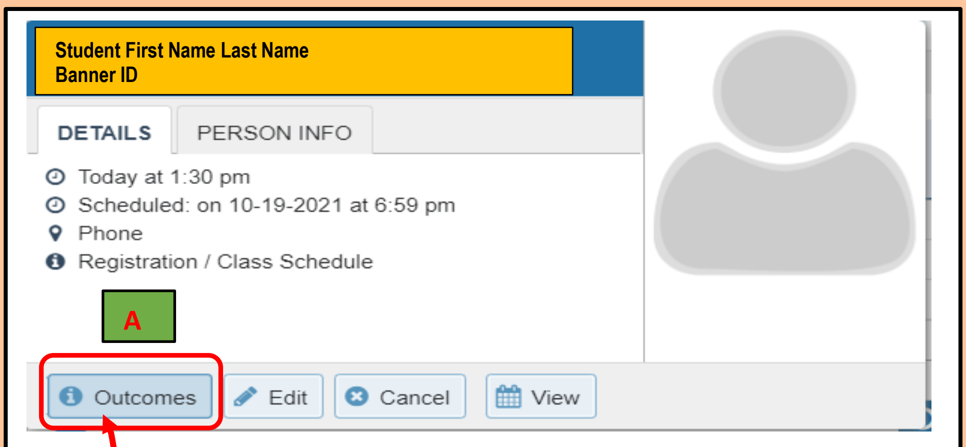
We encourage all of our faculty and staff to document their important interactions in BSP. This helps others that are connected with this student to understand who they have been working with and what they have been discussing as it may be an important piece of information for the other staff/faculty members as well. This promotes information sharing and gives those working with students more tools to help the student when needed.

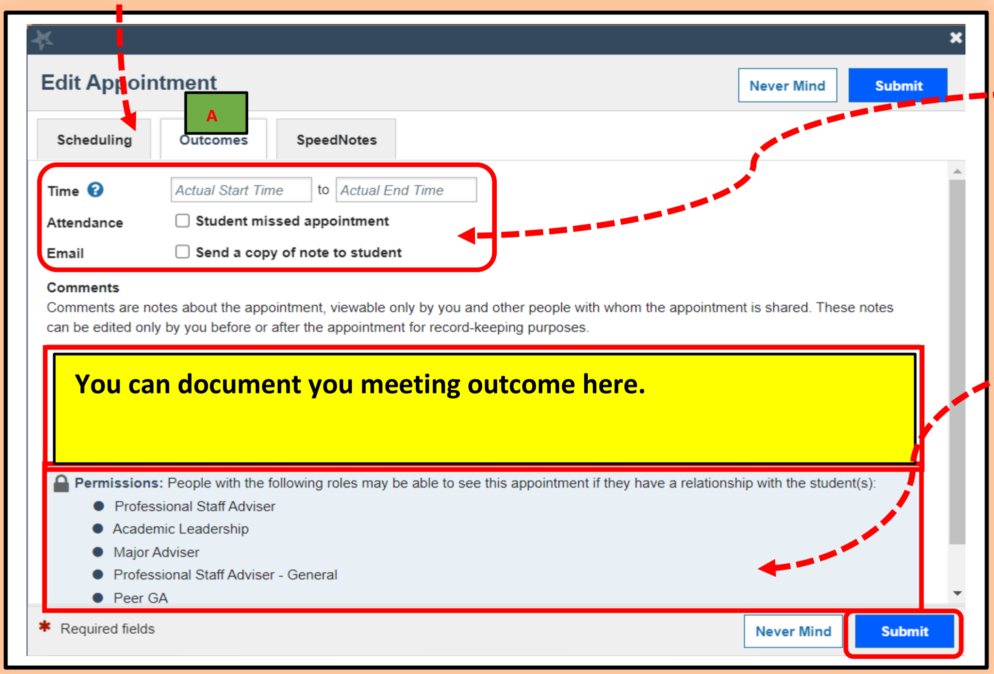
- **Outcomes**, **notes,** and **messages** are ways in BSP that student interactions can be documented. This can include a direct conversation or other information you want to note in the student file.

A. Outcomes

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



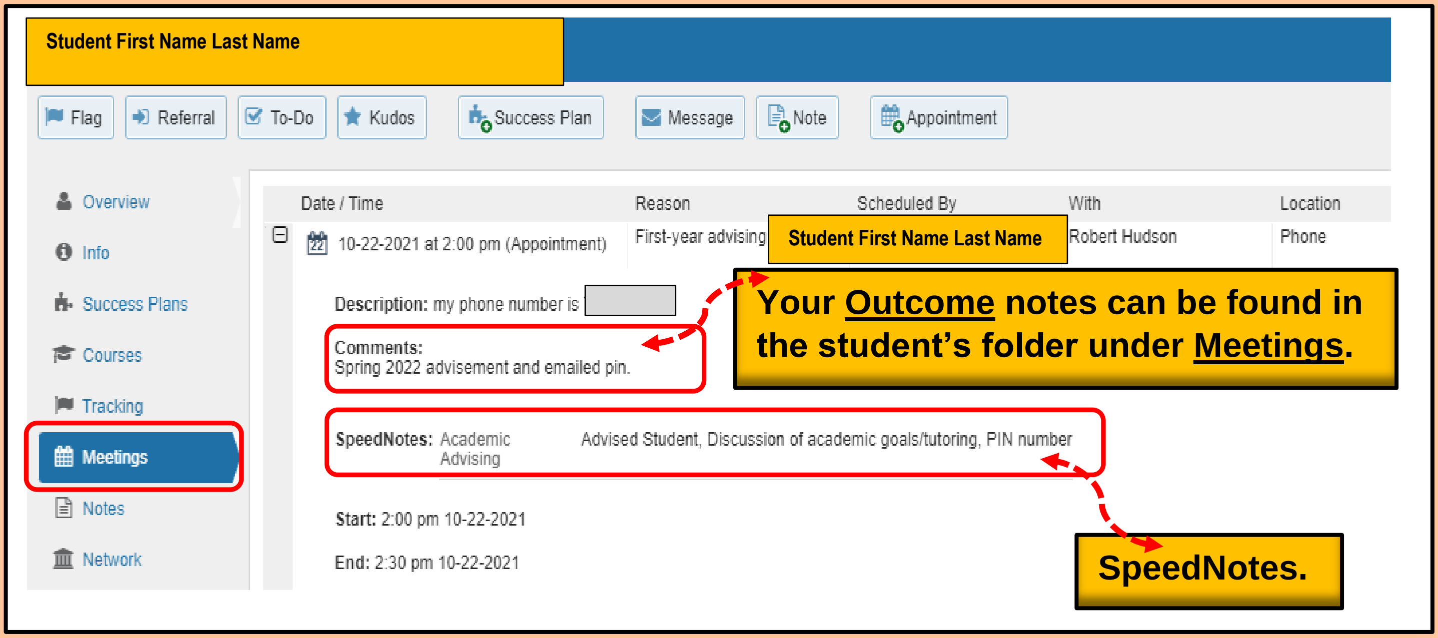


In some situations, a meeting may start or end before or after the scheduled time. In those cases, you can add the actual start and end time of the meeting on the Outcomes tab to account for the actual time that the meeting occurred when that time differs from the scheduled appointment time. Click on the Scheduling tab associated with the appointment to see the originally scheduled time.

***RECOMMENDATION: Is to not change the actual start or end date under the Outcomes Tab.**

The list of roles who will also be able to view this appointment, plus any associated comments and SpeedNotes, is listed in the blue box below.

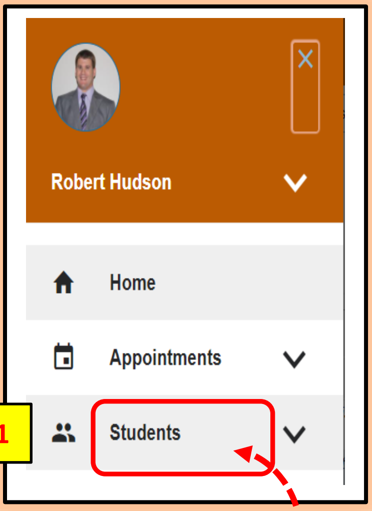
Your **<u>Outcome</u>** notes can be viewed in your student's folder under **<u>Meetings</u>**.



Documenting your student interactions – Notes

B. Notes

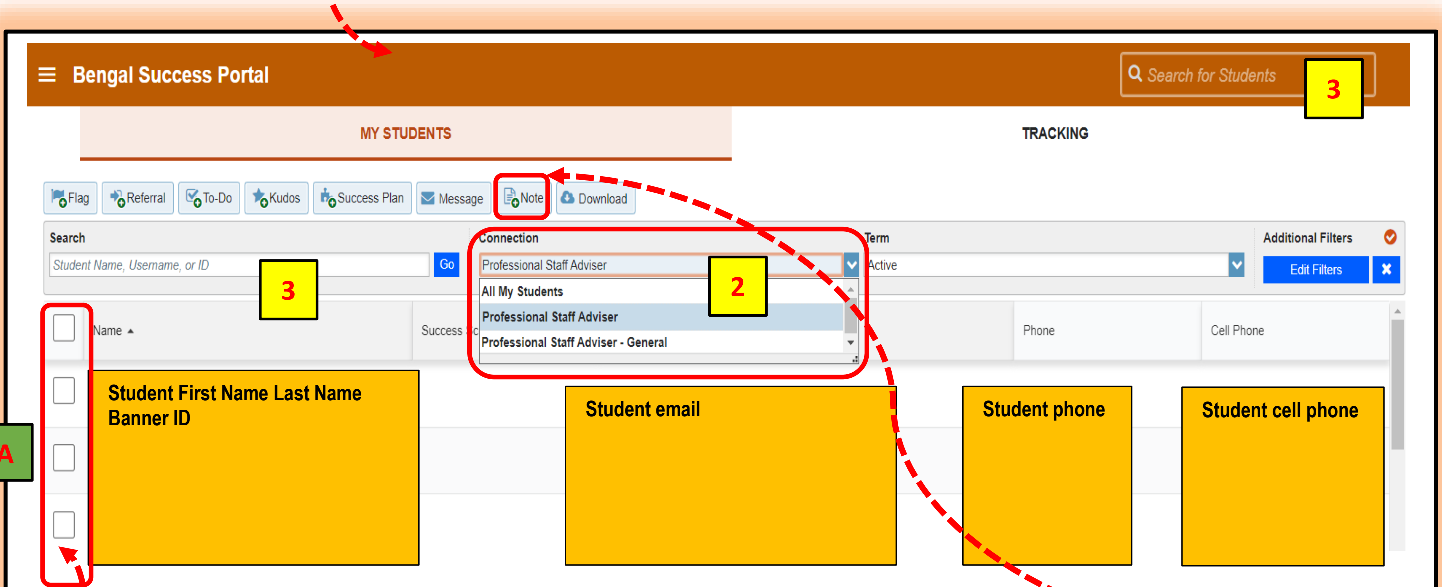
"Notes" act in much the same way as **"Messages"** except they are *shared* and *viewable* in the student folder by others. To document a Note, select the student(s) with which you wish to communicate and click the "**Note**" button.



1. Click on **Students**.

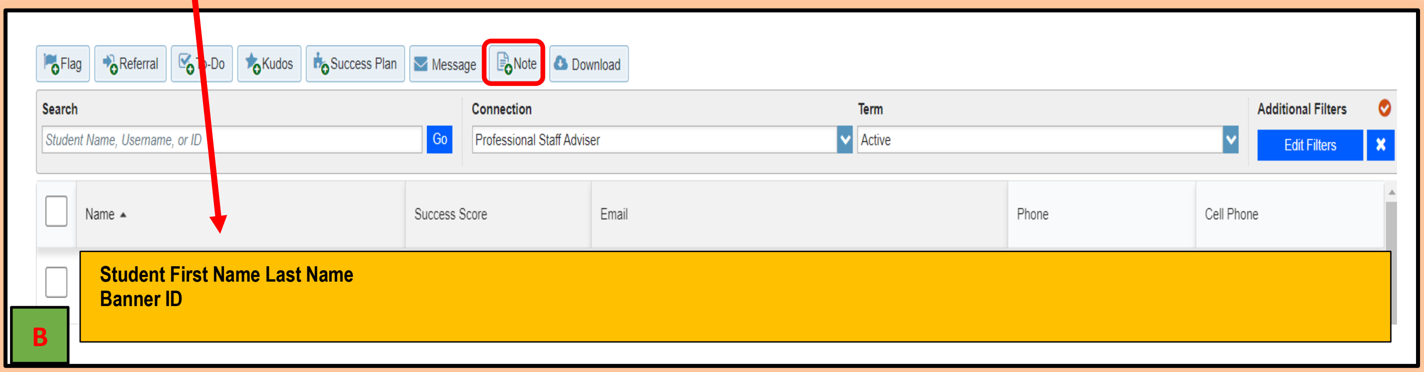
2. Choose your **Connection**. It is possible to have more than one connection type. For example, maybe you are an **instructor** and an **adviser**.

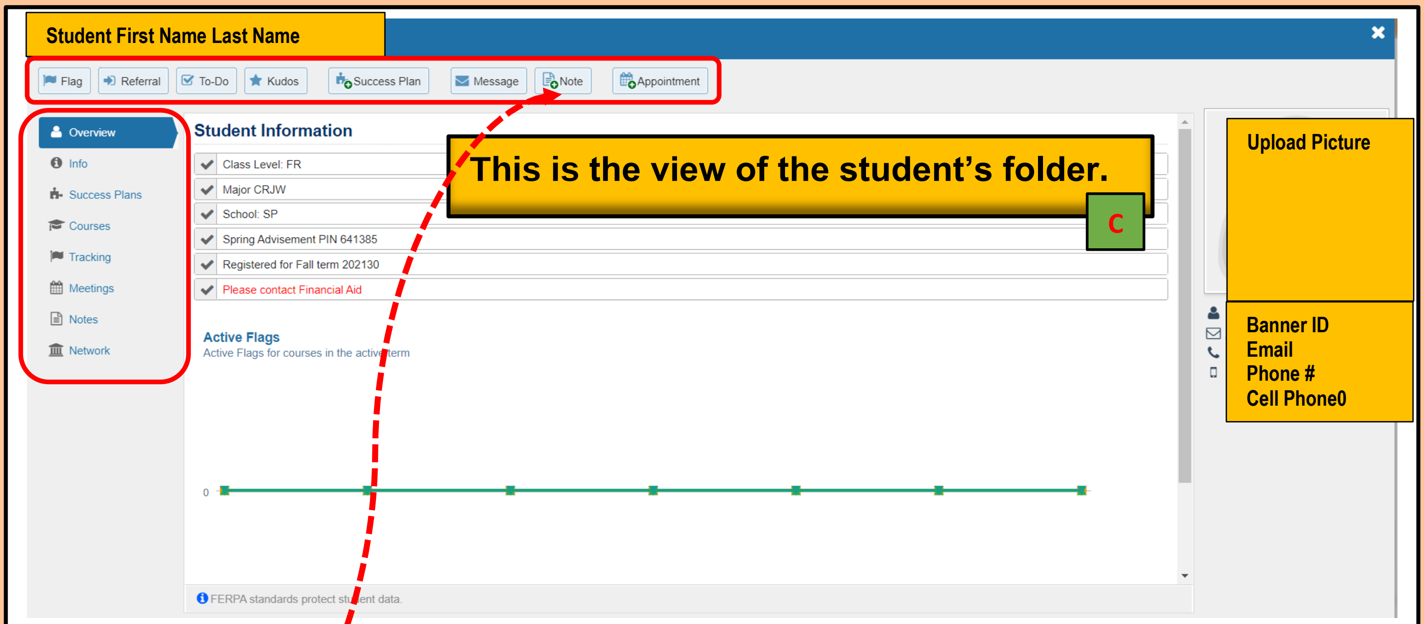
3. You can also **search for your students** in two search boxes.

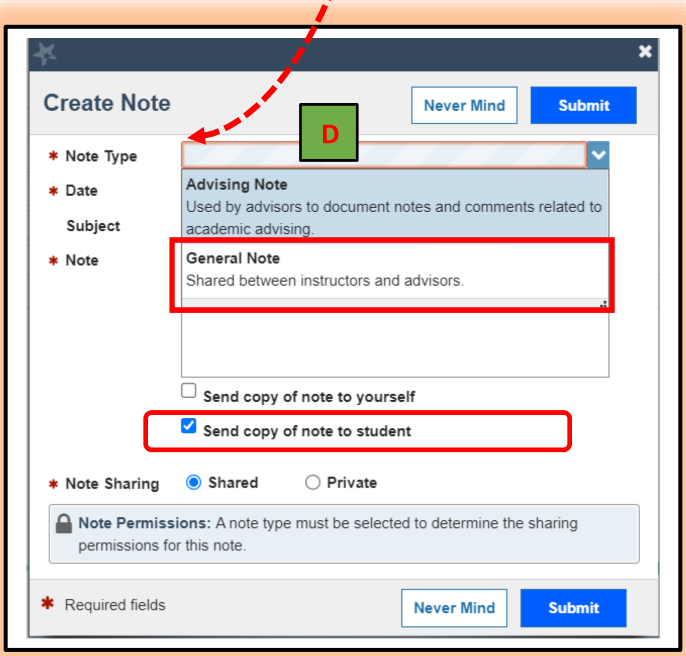


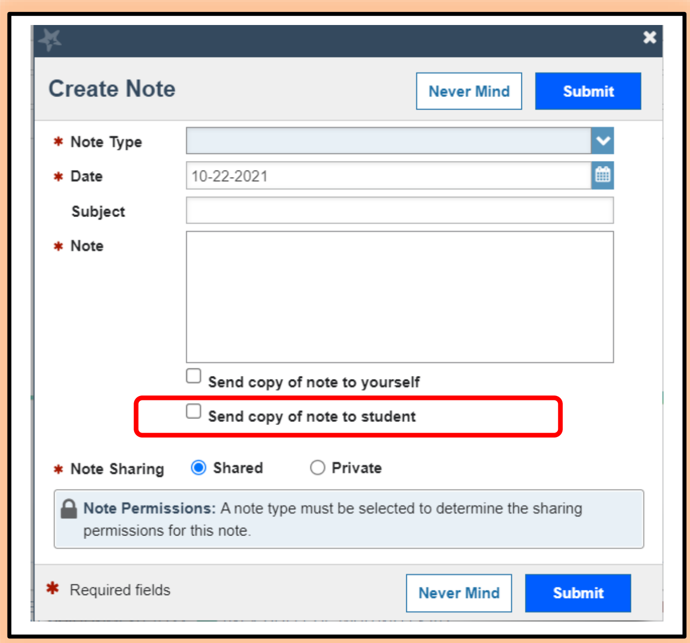
A. You can either put a **check mark** in the blank box next to student name and click **Note** from the menu or

B. **Click student name** and you will now be viewing their **Student Folder** **[C]** then click **Note** at top.



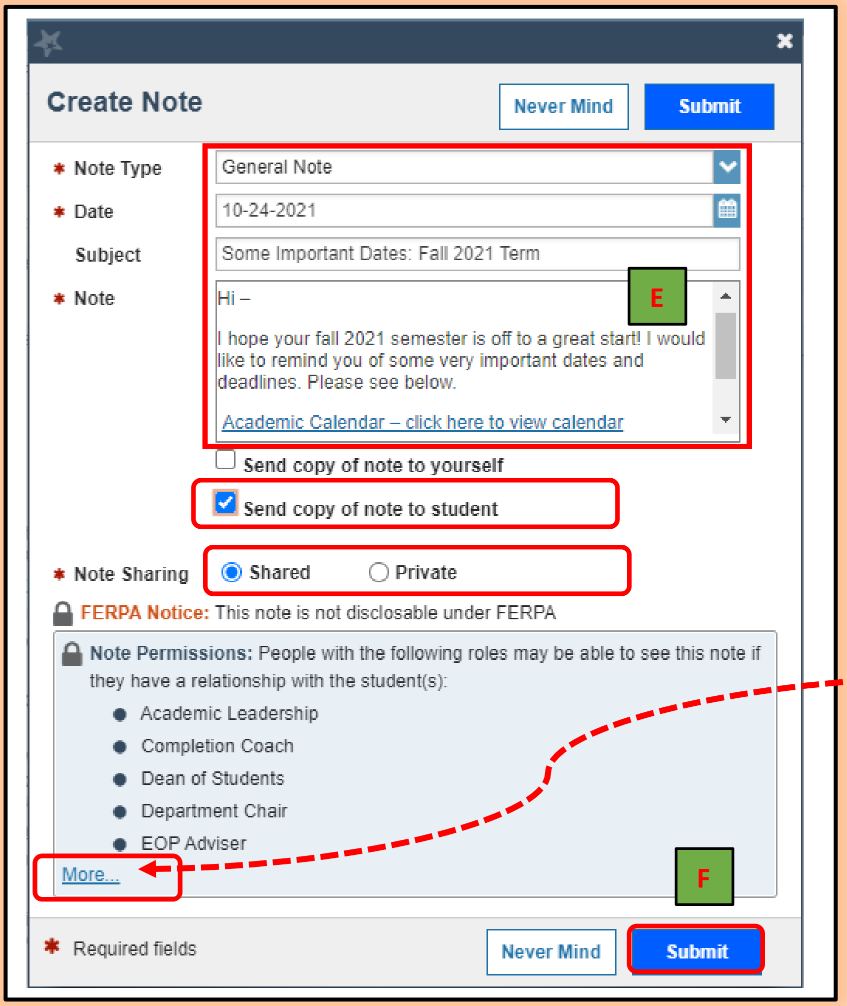


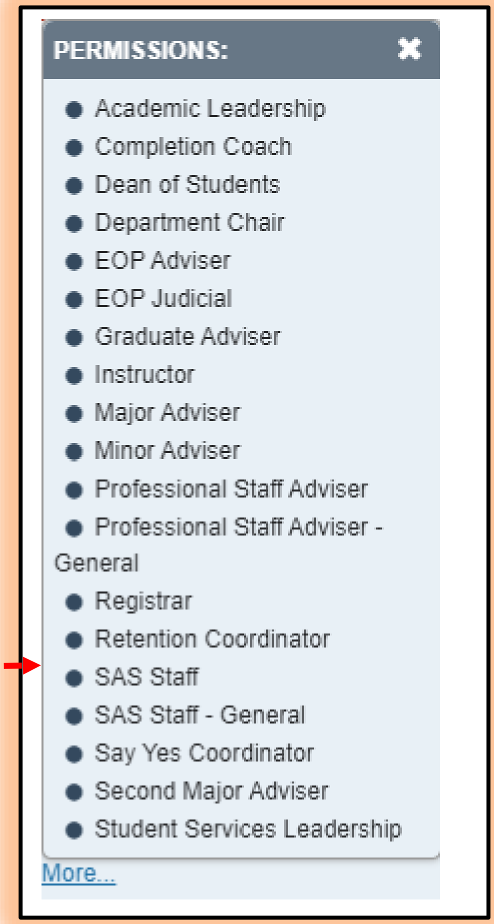




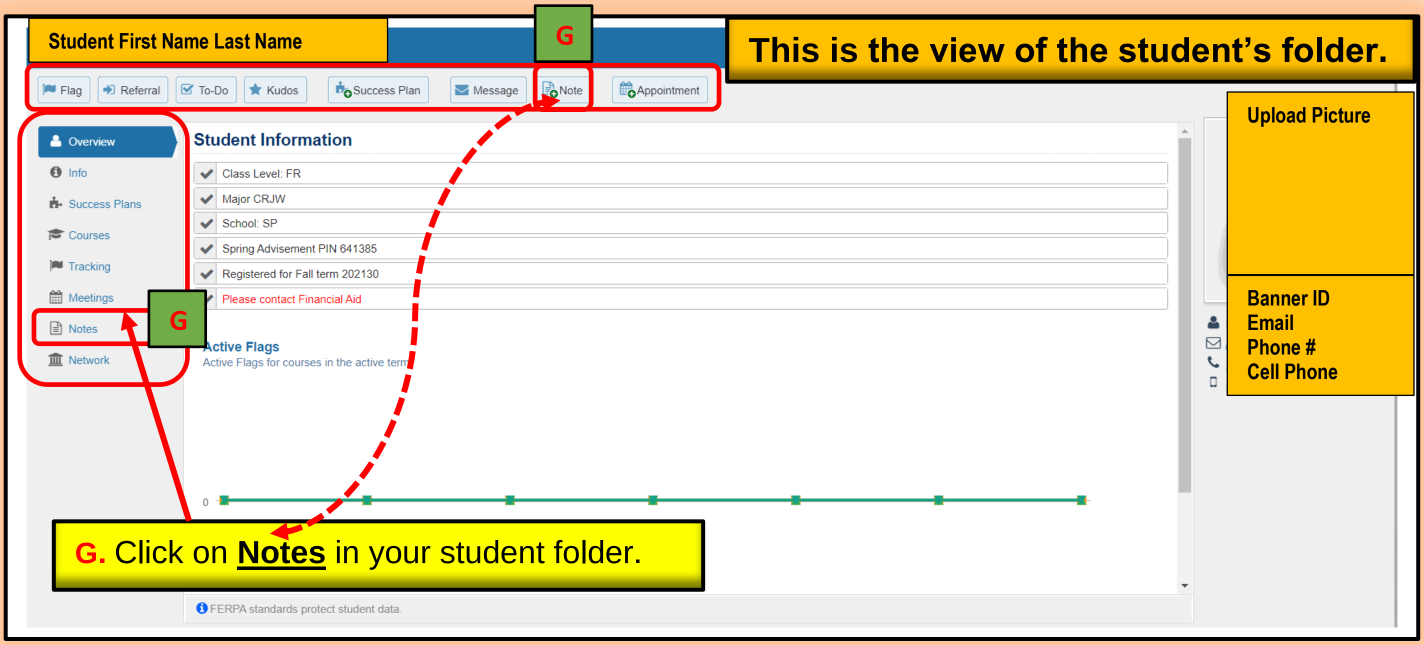
D. Choose your preferred **Note Type** from the drop-down menu. **General Note** is most common and most universally **shared**.

E. Complete the text in the **"Create Note**" box in the same way you would draft an email. Choose to "**Share with Student."** This will create an email from your SUNY Buffalo State email address directly to the selected student(s) Buffalo State email account (s). **NOTE**: Even if you have a signature set up in Outlook mail, it will not populate here. You might want to copy and paste it for reference. You can view a list of roles who can view the note in the **"Note Permissions"** box. Click "**Submit**" **[F]** when you are ready to send.

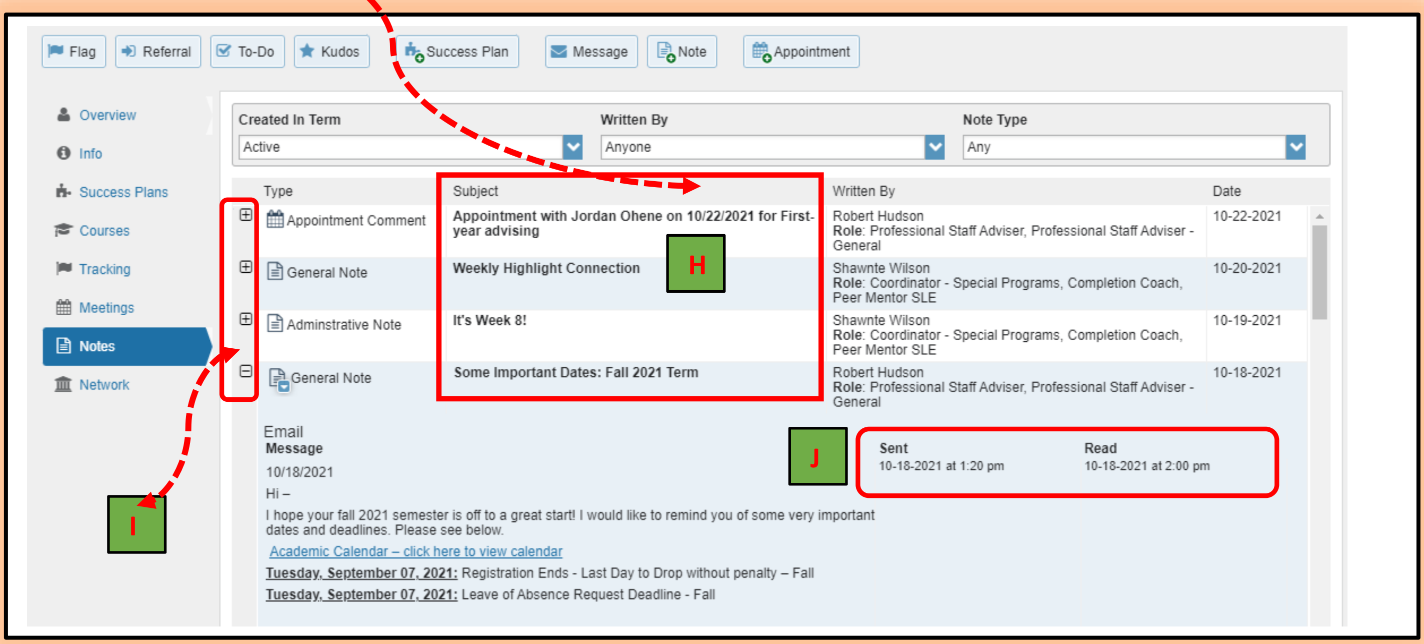




G. After the note is sent to your student's email, you can view the note to see if and when your student has read the note. Click on Notes in your student folder.



H. You will now be able to view **all** your student **notes and messages** in your **student's file**.



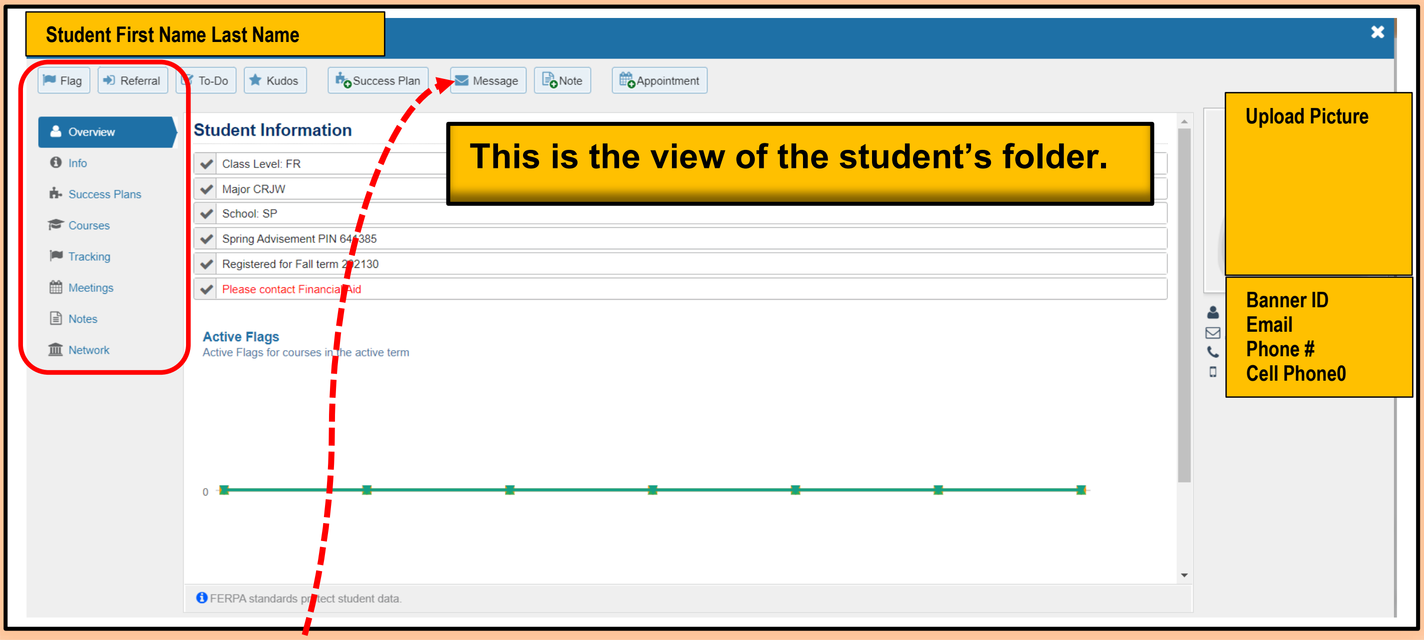
I. You will now be able to view **all** the student notes in your **student's file**. **Click** on the **plus (+)** to view full details of note (s).

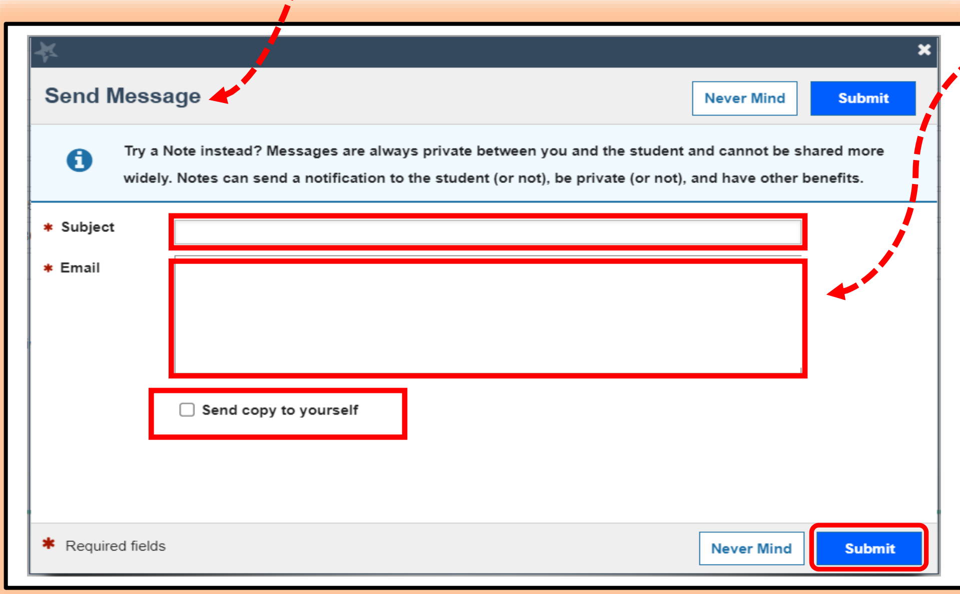
J. You can view the **Date & Time** when note was **sent** to your student **AND** the **Date & time** when your student **read** the note (s).

Documenting your student interactions – Messages

C. Messages

BSP allows you to quickly and easily communicate with students via "**Messages**". Messages are like email. They are crafted and are sent as an email from your Buffalo State email address directly to the selected student (s) Buffalo State email account(s). A copy is also available to the student in his/her **"Messages" tab** in BSP. **These messages are between just you and the receiver, no one else can see them.** They can be accessed later as well. Instructors might find it particularly helpful to know Messages live beyond the life of the course. The best part is you can see if students are actually opening (reading) your messages by reviewing them in the **student folder** in BSP. To use Messages, select the student(s) with which you wish to communicate and click the **"Message" button**. **Messages are always private between you and the student and cannot be shared more widely.** Notes can send a notification to the student (or not), be private (or not), and have other benefits.





Complete the text in the **"Send Message"** box in the same way you would draft an email. **NOTE**: Even if you have a signature set up in your Outlook mail, it will not populate here. You might want to copy and paste it for reference. Click "**Submit**" when you are ready to send.

Documenting your student interactions – SpeedNotes

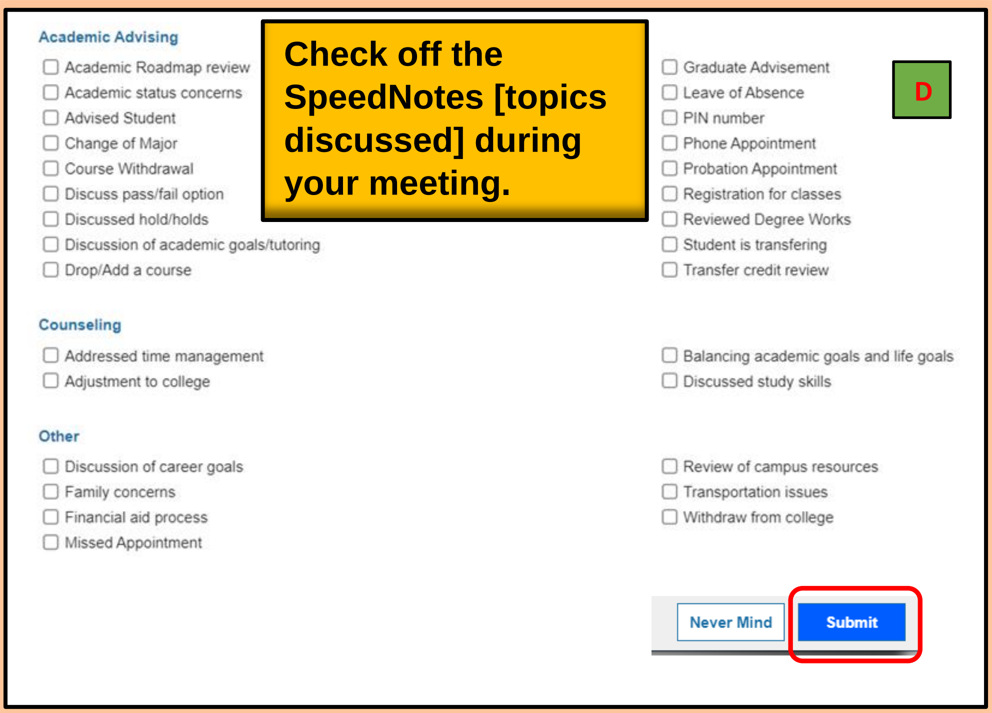
D. SpeedNotes

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

- If SpeedNotes exist for any appointment types in BSP, 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.*

- Check all boxes that are relevant to your meeting.

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



Section 7: Important Definitions

• **Appointment**: A documented set of details shared between a student and a calendar owner (e.g. advisor, instructor) about a planned meeting. Students may only schedule appointments in the future at times the calendar owner designates as available. Calendar owners and calendar managers, can schedule future appointments, and create appointments to document past meetings.

• **Appointment Type**: Grouping of appointment reasons and activities (i.e., SpeedNotes) that a common set of roles can add and/or view. Your BSP Administrator will create appointment types and associated reasons and SpeedNotes that will be available to you based on your role. You may be able to use appointment types to allow different groups of students to see different office hours on your calendar.

• **Calendar attachment (iCal)**: Attachment to an emailed calendar invitation that allows a user to accept or decline from his/her email client (e.g., Outlook, Google). iCal is the industry standard to communicate meeting information between online calendaring software.

• **Calendar Manager**: A BSP user who can see and edit another user's BSP calendar. A calendar owner can designate his/her own calendar managers by navigating to Profile > Appointment Preferences. Or, a BSP Admin can batch upload these relationships.

• **Calendar Owner**: The BSP user associated with a BSP calendar. The calendar owner can add office hours and make appointments with students on his or her calendar. Only users with staff roles are calendar owners. Students do not own calendars in BSP.

• **Group Session**: Similar to Office Hours, but more than one student can sign up for this particular block of time. The Calendar Owner decides how many students can sign up for each Group Session.

• **Meeting**: A documented occurrence of a meeting between a student and a calendar owner (i.e., advisor, instructor) that includes details about the outcomes of the meeting. Calendar owners may designate available times for walk-in meetings, or restrict availability to scheduled appointments only. Students may only schedule appointments in the future at times the calendar owner designates as available. Calendar owners and calendar managers, can schedule future appointments, and create appointments to document past meetings.

• **Office Hours**: Calendar owners can add blocks of time called "Office Hours" to their calendars to indicate when they are available to meet with students. Calendar owners or calendar managers can add appointments outside the blocks, but students can only self-schedule within the block. Office Hours allow students to sign up for individual one-on-one slots within the time parameters entered by the calendar owner.

• **Outcomes**: Results of a meeting documented on the Outcomes tab of an Appointment in Bengal Success Portal [BSP].

• **SpeedNotes**: Activity codes that provide an easy way for staff to document common outcomes of an appointment. Specific SpeedNotes are set up by the institution per Appointment Type.