

# MySuccess @ KU

## GETTING STARTED/GENERAL GUIDE

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**WELCOME TO MYSUCCESS** – MySuccess provides students a way to connect with the right people to get the help they need. Through MySuccess, students can schedule meetings with their instructors and advisors, as well as view important academic information such as early alert flags.

In this system, instructors and advisors can easily manage their student appointments, send early alert flag notifications to students, and more easily filter through their students.

Getting started is easy. This guide goes through the initial step-up and highlights common tasks in MySuccess. Additional documentation guides can be found under the Resources/FAQ section of the MySuccess website (<http://mysuccess.ku.edu/>).

For more information on any of the terminology in this document, please see our [glossary](#) on the MySuccess website under the Resources tab.

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*Questions?*

Email us at [mysuccess@ku.edu](mailto:mysuccess@ku.edu)

Resources available at <http://mysuccess.ku.edu/>





## How to access MySuccess

MySuccess can be accessed one of two ways:

1. Via the **myKU Portal**
  - Access the **myKU** portal
  - In the *Academics* area, click on **MySuccess**
2. Via **Blackboard**
  - Sign into **Blackboard** using your KU Online ID and password
  - On the *My Blackboard tab*, in the *Tools* module, click on the **MySuccess** link

## Setting up your Profile

The first time you log in, you should take a moment to set up your profile. Some of your profile, such as your contact information, is automatically imported.

You can customize your profile by uploading a photo, setting appointment reminders, and adding a secondary email address for receiving MySuccess email. You also have the ability to edit other parts of your profile, such as your biography.

To access your profile settings, click on your name in the Top Navigation bar.

### Institutional Profile (all users)

1. You may add an **alternate email address** if you would like MySuccess to send email to a different account. You can choose to send notifications to your institutional email, alternate email, or both.
2. Double check that the **time zone** selected matches your time zone. This time zone will be used when including appointment times in emails from MySuccess.
3. Help put a face to your name by clicking the **upload photo** link beneath the existing photo or photo placeholder. Browse to a photo file (.jpg, .png, or .gif), and then click the Upload Now button to update your photo.
4. (*Students only*) Update your **Weekly Updates** and **Reminder Preferences** according your preference.
5. (*Instructors/Staff only*) You can provide additional information about yourself in the **General Overview** and **My Biography** sections.
6. Click the **submit** button to save your changes.



## Appointment Preferences (Instructors/Staff only)

After you have finished the institutional profile, click on the **appointment preferences** tab. If you would like to sync your appointments with your Outlook calendar, be sure to complete step 2b in the next section (email notifications).

1. Basics:
  - a. Change your **minimum appointment length** to the appropriate amount of time.
  - b. If you would like to set a **scheduling deadline** for appointments, do so here. You can choose from the day before, the day of, or an amount of time before the appointment. *NOTE: Advisors and staff can still manually add an appointments if they accept a request outside of this deadline.*
2. **My Locations** – This makes setting meeting locations in your appointment blocks faster:
  - a. Type – Office, Phone, Elsewhere, or Online
  - b. Name – This should include either your office building & number OR the location you would like to student to go to check in for their appointment if you have a waiting area.
  - c. Instructions – Use this area to give any special instructions to the student, which may include:
    - i. Items you would like them to include in the appointment details box
    - ii. Instructions on how to prepare (i.e. “Please bring documents from previous advising appointments. If you are coming to talk about enrollment for the next semester, you should come to your appointment with 3-5 classes you might want to take.”)
    - iii. Directions for a hard to find office
3. **Calendar Manager** – These are typically managed at the individual level. You may add in additional calendar managers if you want to let someone else make appointments on your behalf.

## Email Notifications (Instructors/Staff only)

1. After receiving your first email from MySuccess, put the email address on your **safe sender list** to prevent future emails from being marked as spam.
2. **Appointment Notifications**
  - a. Adjust these settings according to your notification preferences
  - b. Important notes for those who have appointment blocks:
    - i. In order to ensure your MySuccess calendar shows busy time already on your Outlook calendar, you must *check the box* that says “Read busy times form my external Exchange calendar.”
    - ii. In addition, you must follow the instructions for *sharing your calendar with MySuccess*. Use the link next to the checkbox for detailed instructions.
3. **Summary Emails** - Check these boxes if you would like to receive summary emails. If you leave them unchecked, you will still receive appointment emails.
4. **Tracking Item Notifications** - Adjust these settings according to your notification preferences



## Scheduling an appointment

### For students

1. On either the *My Success Network* or *Courses* menu, click **Schedule Appointment** for the desired person or service.
2. Use the *small calendar* on the left to quickly identify days with **available office hours** (available days will be shown in bold). Click the desired date to display available times.
3. Click on the **sign up** link on any open time slots for the selected day.
4. An **add appointment** form will open. Complete the form by selecting a reason for the meeting and a course (if relevant). *Include an explanation* of what you need so that your instructor or advisor can be prepared for the meeting.
5. Click **Submit** to set the appointment. You will get an email with the appointment details and the appointment will be listed on your *Dashboard*.

### For instructors/staff

1. You can schedule an appointment by clicking on the *appointment* button along the top through the **Home** or **Appointments** menus. You can also click the same button that appears in each student folder.
2. An **add appointment** form will open:
  - Choose the appropriate calendar from the drop down menu (for scheduling on your calendar, choose the *My Calendar* option).
  - Fill in the rest of the appointment information, including **when**, **where**, and **reason**, as well as the **course** if it is relevant.
  - Enter any additional notes about the appointment in the detailed description box on the right.
3. Click the **submit** button. Both you and the student will get an email with the appointment details.

**Note:** MySuccess will not let you schedule an appointment for any time that either already has an appointment scheduled OR any time that you have blocked on your Outlook calendar (if you have synced your calendar).



## Changing or cancelling an appointment

When making changes to appointments, only make changes in MySuccess (not Outlook). Changes or cancellations made in Outlook will not change your MySuccess appointment schedule and no notifications will be sent.

### For students

When making an appointment in MySuccess, time is reserved on *your* calendar AND the calendar of that *instructor/staff member*.

If you need a different appointment time, you will need to cancel your original appointment time and schedule a new appointment as described above.

Please make these changes as soon as you are able to give the person you are meeting with time to prepare for your meeting.

On your **Dashboard**, find the appointment you would like to change.

1. Click the x icon to **cancel** it, or
2. Click the pencil icon to **edit** the appointment.

**Note:** When changing or cancel an appointment, an email notification will be sent to both you and the instructor/staff member.

### For instructor/staff

If you need to cancel the appointment or change the appointment details, please do so as soon as you know there is a conflict so students have time to make alternate appointment times.

**Note:** Cancelling an appointment block will **also** cancel all appointments that have been scheduled during that appointment block.

1. You can find your appointment in the following areas:
  - a. Under the *Appointments* section of your **Home** menu,
  - b. On your *Calendar* on the **appointments** menu, or
  - c. In any student folder under the **meetings** tab.
2. Hover your mouse over the calendar icon.
3. Click the **edit** or **cancel** button.
4. If you edited your appointment, click on the **submit** button.

### Managing Another User's Calendar (calendar managers only)

1. If you are a Calendar Manager you will see a Schedule tab in your Appointment area.
2. This view will allow you to see multiple calendars at once.
3. As a Calendar Manager, you can add, edit and delete items from another user's calendar.



## Advanced functions (Instructors/staff only)

### Setting up office hour blocks

Setting up **office hour** blocks allows students to easily schedule appointments with faculty or staff members through MySuccess.

#### *Initial setup*

The first time you log in, MySuccess will provide a setup wizard to set up your office hours. As a best practice, you should ignore this wizard, complete the initial profile setup, and add in your office hours through the **Appointments** tab using the instructions below.

#### *Creating new office hour blocks*

1. Go to Appointments > **Add Office Hours**.
2. Give your block a **title** (students will be able to see this).
3. Indicate which **day(s)** of the week this block occurs.
4. Specify the **start** and **end time**.
5. Set the **location**. You can set up multiple locations by clicking on your name, in the upper right corner, and then selecting Appointment Preferences.
6. Enter any special instructions, or specify a **Start/End Date** if it is part of a series. As a best practice, you should only set your office hour blocks through the end of a semester.\*
7. Click the **Save** button.

**Note:** \* MySuccess only displays Outlook appointments/meetings **84 days** out from today. You may want to consider this when setting the end date for Office Hour blocks. If your Office Hour blocks extend past the 84 days, it will be possible for students to request appointments during times that are already reserved on your Outlook calendar.



## [Progress Surveys \(instructors only\)](#)

If you or your course manager have arranged to participate in a progress survey campaign, you will receive an email reminder when there is a new survey for you to complete. Each individual survey represents a single student roster for each course section in which you can raise flags.

1. Select the progress survey link on your MySuccess Home page to go the Progress Surveys tab (only visible when you have active surveys). The selected survey opens, listing your students on the left, and items you may raise across the top.
2. Check the box for each desired item/ student combination. You can click the comments icon to open a text box for your notes or the information icon to verify whether or not the student can view the flag and related comments.
3. Click the Submit button when you are finished providing feedback. The items you selected will be raised on your students when you submit the survey.

**Note:** Once you have submitted the survey, you will not have an opportunity to add to or undo the items you raised. Used the **Save Draft** option if you aren't ready to submit your survey. You may manually raise additional flags.

Additionally, you may be asked to submit more than one course survey. They will be listed in the drop-down menu on the **Progress Surveys** tab.



### [Raise a Flag, Kudos, or Referral \(instructors only\)](#)

When you have a concern with a particular student, you can raise a flag or referral to communicate your observations. You can also raise a Kudos for students that are doing especially well in your course. The appropriate individuals will be automatically notified when you save the item.

1. Click on the **Students** navigation menu to see your list of students.
2. Find the desired student by selecting their course on the **Connection** pull-down menu or by typing the name into the **Search** box.
3. Click on the student's name to bring up the **Student Folder**.
4. Click the **Flag, Kudos, or Referral** button. A list of items that you have permission to raise on this student will be displayed.
5. Select the desired **Flag, Kudos** or **Referral** from the list.
6. Select your course from the **Course Context** drop down list, and enter notes in the **Comment** box. You can find standard email responses on the [MySuccess resources page](#).
7. Click the **Save** button.

**Note:** The **Permissions** area lists roles that have permission to view the selected flag and the notes you include in the **Comment** box.



### Clearing a Flag/Close the Loop (instructors/staff only)

After a student has taken appropriate steps to resolve the concern that was raised, advisors and instructors may clear the flag. The flag will remain in the student's folder, but will appear as **Resolved**.

In addition, the **Close the Loop** functionality provides an easy way to follow up with flag raisers after clearing a flag. This encourages best practices of communicating to the flag raiser that the issue has been addressed.

1. While looking at a student's flags, hover over the flag icon.
2. Click the **Clear** button and a menu will open.
3. Select a reason for clearing the flag:
  - a. *Completed* – Contacted student, an academic plan for improvement was discussed.
  - b. *No Reply from Student* – Multiple attempts of contact were made, student did not reply.
  - c. *Meeting with Faculty* – Contacted student and they will follow up with instructor directly.
  - d. *Administrative* – Student has dropped or withdrawn from the course
  - e. *Refused* – Contact was made; Student refused services.
4. Add in your comments about your interaction (e.g. Talked about a time management plan to make sure they could get to class on time)
5. If available, the '**Send a message to [flag raiser] to close the loop**' box is checked. If you would like a message sent to the instructor that raised the flag, leave the box checked and either enter the message you would like to send or click on the **Copy my comment** button. If no close message is needed, the box can be unchecked by the user.
6. Click the **Submit** button.

**Note:** When resolving multiple items at a time, users will select the reason and enter the comment that applies to all the items being resolved.