

Zoom Meeting Header: You are viewing Kirsten Van Detta's screen | View Options


Monthly SME Network Meeting Agenda

Product Updates

- Review recent updates for Trellis Advise
 - Automated sync from Trellis to Outlook – in beta. Launching May 27th
 - Important cases
 - Create drop-in checkbox
 - Referrals
 - Reports & Dashboards
 - Incoming groups and data sharing
- Upcoming updates
 - Recurrence for availability
 - Student Community expansion

Training & Support Updates

Open Q&A



Zoom Meeting Footer: Unmute, Stop Video, Participants (19), Chat, Share Screen, Record, Reactions

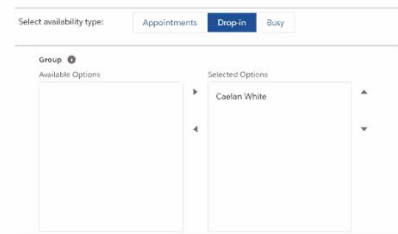
Outlook Integration

Automated Sync from Trellis to Outlook

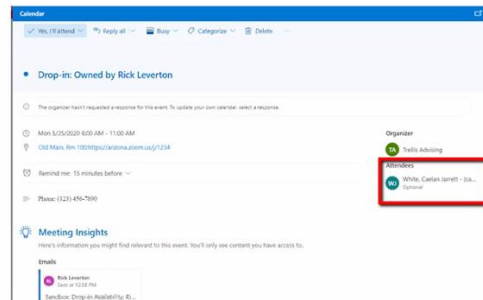
The new Outlook integration automatically updates your Outlook calendar based on updates to your Trellis calendar.

When you create or update availability or appointments on your calendar:

- Appointment and Drop-in availability types will automatically sync. *No email will be sent.*
- The “Busy” availability type does not sync to Outlook
- Group members you select for a group drop-in will receive an invite email and be set as Attendees on your/their Outlook calendar



Selecting a colleague to participate in a group drop-in



Group drop-in Outlook invite

Originator advisor doesn't receive email, but if adding the availability or appt to another advisor's calendar, that advisor will receive email. Calendar add-in will not ask for advisor input, it will directly be added.

Busy availability will not sync to outlook.

Zoom Meeting You are viewing Kirsten Van Detta's screen View Options

Outlook Integration

Automated Sync from Trellis to Outlook

When someone else adds or updates an availability or appointment on your calendar:

- For appointments created by others (students, colleagues), you will receive an email notification as an alert. No action is required. The appointment will automatically sync to your Outlook calendar.
- Changes to appointments will automatically sync. No email notification will be sent.
- Canceled and deleted appointments will automatically be removed from your Outlook calendar. Email notifications for canceled appointments will be sent. No action is required.

From: crm-noreply <crm-noreply@email.arizona.edu>
Sent: Friday, May 22, 2020 10:28 AM
To: White, Caelan Jarrett - (caelan) <caelan@test.arizona.edu>
Subject: Sandbox: Blair Houston - Appointment booked

Blair Houston has booked an [appointment](#) with you.

Appointment Details

Date: Friday, May 22, 2020
Time: 2:30 PM - 3:00 PM

Why they want to meet: Test

An email notification for a booked appointment

From: crm-noreply <crm-noreply@email.arizona.edu>
Sent: Friday, May 22, 2020 10:28 AM
To: White, Caelan Jarrett - (caelan) <caelan@test.arizona.edu>
Subject: Sandbox: Blair Houston - Appointment canceled


Your [appointment](#) with Blair Houston was canceled.

Appointment Details

Date: Friday, May 22, 2020
Time: 2:30 PM - 3:00 PM

Why they want to meet: Test

An email notification for a canceled appointment



Go Live May 27 to all Trellis users.

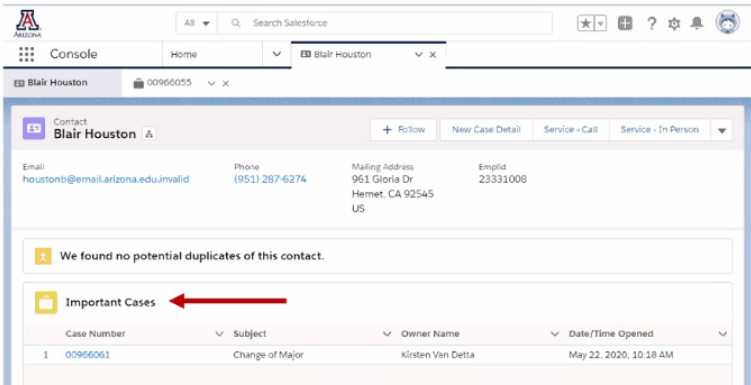
Current availability that go past the 27th, anytime these are updated, they will automatically update to the new system, but so will the old one. Recommend by Trellis team, wait to update Trellis past May 27 until this update occurs.

Zoom Meeting You are viewing Kirsten Van Detta's screen View Options

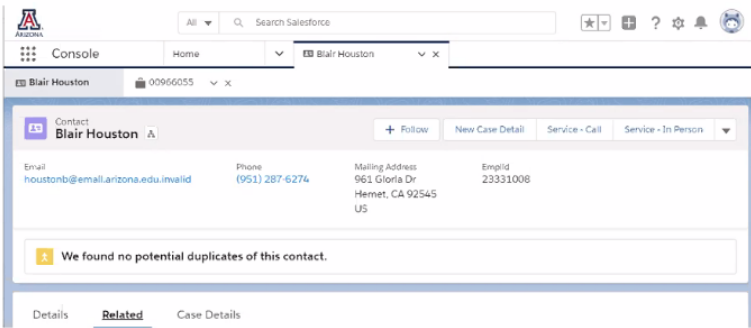
Important Cases

Purpose

- To provide users with a way to call attention to case notes that should be elevated in view
 - Examples
 - Dean of Students flags a "Welfare Check" case as important
 - Advisor flags a "Change of Major" case as important
- When viewing a student's record, important cases will appear at the top of the screen
 - If none of the student's cases are flagged as important, the section will not appear



Student record with important cases



Student record without important cases

Unmute Start Video Participants 20 Chat Share Screen Record Reactions

Type here to search

Can see 5 at a time and scroll down for more.

At this time, they do not drop off the list over time, this might update in the future.

The screenshot displays a Zoom meeting window with a shared screen showing a Salesforce contact record for Aaron A Avery. The browser address bar shows the URL: ua-trellis-stage.lightning.force.com/lightning/r/Contact/0032500002A73zLQAR/view. The user is logged in as Rebecca Field. The contact record includes the following information:

- Contact:** Aaron A Avery
- Email:** aaa3@email.arizona.edu.invalid
- Phone:** (520) 230-0438
- Mailing Address:** 4206 E Los Robles St, Tucson, AZ 85712, US
- Emplid:** 02358673

A message states: "We found no potential duplicates of this contact." Below this is a table of important cases:

Case Number	Subject	Owner Name	Date/Time Opened
1 00966073	Student Concern	Rebecca Field	May 22, 2020, 01:48 PM

The "Contact Details" section shows:

- Name:** Aaron A Avery
- Preferred First Name:** Aaron

The Zoom meeting controls at the bottom show 20 participants, chat, share screen, record, and reactions options. The system tray at the bottom of the screen shows the time as 1:48 PM on 5/22/2020.

Changes can be made to important flag until 11:59PM of entry date.

Referrals:

Zoom Meeting

The screenshot shows a Zoom Meeting window displaying a Salesforce interface. A modal window titled "New Case Detail" is open, showing the "Create Referral" form. The form includes fields for "Referred from" (set to "Advising") and "Referred to" (set to "Financial Aid"). Below these fields is a rich text editor with a toolbar and a text area containing the message: "Please go to financial aid which is located in the admin building to learn more about your". The background shows the Salesforce contact page for Julie Ann Wagner, with a sidebar containing "Important Cases" and "Appointments (1)". The Windows taskbar at the bottom shows various application icons and a search bar.

Chrome File Edit View History Bookmarks People Tab Window Help

Julie Ann Wagner | Salesforce

ua-trellis--stage.lightning.force.com/lightning/r/Contact/003f4000018qSwBAAU/view

Logged in as David McGuiggan (dmcguigg@email.arizona.edu.stage) | Sandbox: STAGE | Log out as David McGuiggan

New Case Detail

Create Referral

The information provided here will be emailed to the Contact.

* Referred from
Advising

* Referred to
Financial Aid

The text entered below will be included in the body of the email exactly how it is entered:

Salesforce Sans 12 B I U

Please go to financial aid which is located in the admin building to learn more about your

Next

Console Home

Contact
Julie Ann Wagner
Email
elkinney@email.arizona.edu

We found no potential d

Important Cases

Case Number
1 00966036

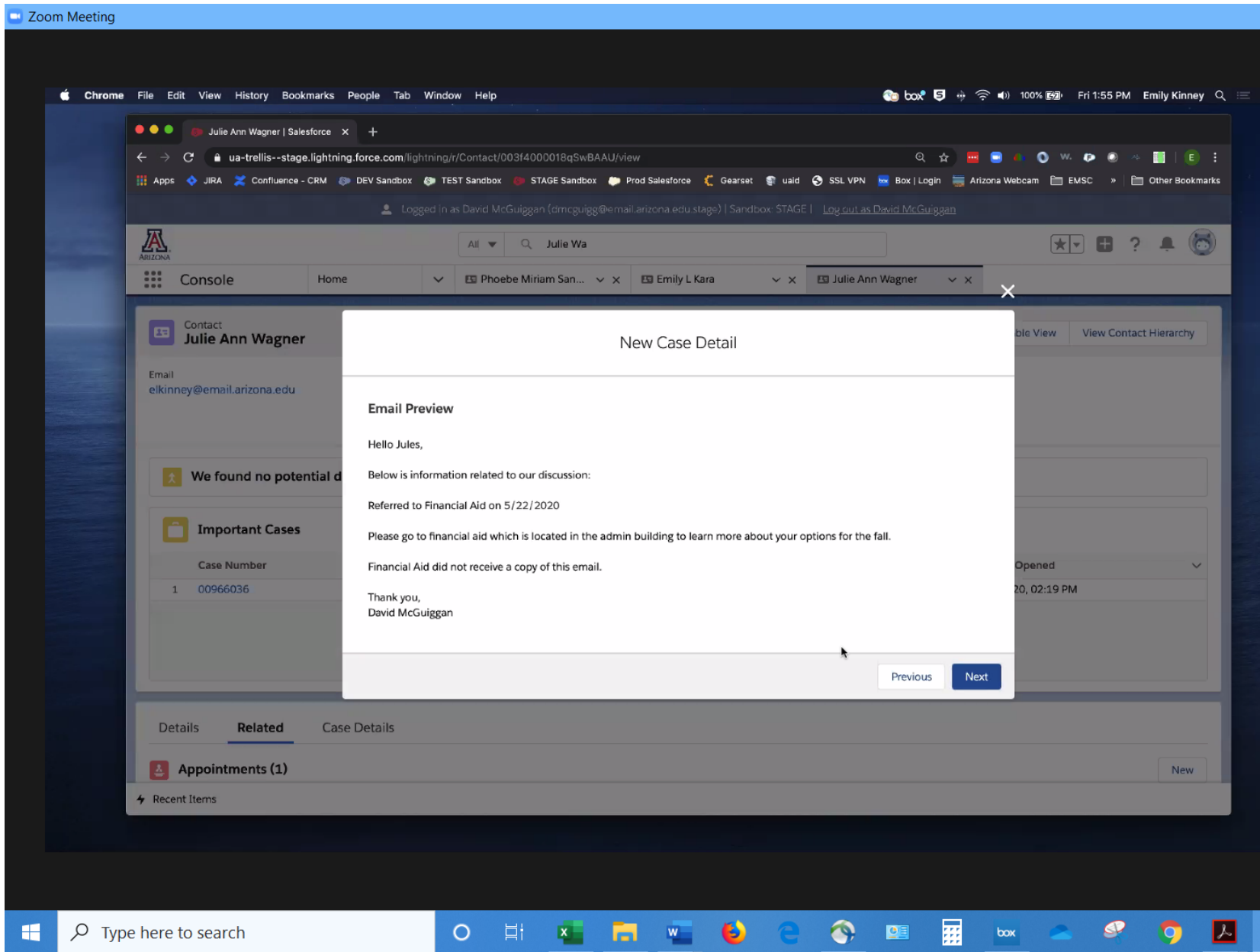
Details **Related** Cas

Appointments (1)

Recent Items

Type here to search

Windows taskbar icons: File Explorer, Word, Edge, Chrome, etc.



Sample email view, with student's preferred name in the image above. Edits can be made to the email from here, before it is sent to the student. Only the student receives this email, with the referral reminder. Currently a link to the referral source is not included, advisor should add that to the body of the email message prior to sending it. All "referrals" can be tracked to know who is being referred where and when and by whom. Only the referred unit can read the email sent to the student to create the referral.

Sample of the new "referral" list in Trellis now:

The screenshot shows a web browser window displaying the Salesforce Trellis interface. The user is logged in as David McGuiggan. The interface shows a navigation bar with the Arizona logo and a search bar containing "Julie Wa". Below the navigation bar, there are tabs for "Console", "Home", and three user profiles: "Phoebe Miriam San...", "Emily L Kara", and "Julie Ann Wagner". The main content area displays a list of referrals for Julie Ann Wagner. The list is titled "Referrals (4)" and includes a "New" button. The table below shows the details of the referrals.

Referral Name	Referred from	Summary	Created By
R-028	Advising	Referred to Financial Aid on 5/22/2020	David McGuiggan
R-027	Advising	Referred to Financial Aid on 5/22/2020	David McGuiggan
R-026	Registrar	Referred to Financial Aid on 5/19/2020	Rick Leverton
R-025	Dean of Students	Referred to Study Abroad on 5/19/2020	Rick Leverton

Below the referrals list, there are sections for "Early Progress Reports (0)", "Student Enrollments (1)", and "Student Group Members (5)". The "Student Enrollments (1)" section shows a table with the following data:

Student Enrollment Name	Program	Plan	Program Status
SE-0550845	UEDUC: College of Education	MMDIBSED: Mild Moderate Disabilities	Active in Program

The Windows taskbar at the bottom shows the search bar and several application icons including Chrome, Word, and the Zoom Meeting application.

Email to student sample copy below:

The screenshot shows a Zoom meeting interface with a green status bar at the top indicating "You are viewing Emily Kinney's screen" and a "View Options" dropdown. The main content is a shared Outlook window. The Outlook window title is "Sandbox: Referral from David McGuiggan - Inbox". The email header shows it is from David McGuiggan <dmcguigg@email.arizona.edu.invalid> sent today at 1:56 PM to Kinney, Emily Lesauski - (ekinney). The email body features the University of Arizona logo at the top, followed by the heading "REFERRAL FOLLOW UP". The text of the email reads: "Hello Jules, Below is information related to our discussion: Referred to Financial Aid on 5/22/2020 Please go to financial aid which is located in the Admin building to learn more about your options for the fall. Financial Aid did not receive a copy of this email." The email concludes with "Thank you, David McGuiggan" and a signature block containing the University of Arizona logo. The Zoom meeting controls at the bottom include Unmute, Start Video, Participants (20), Chat, Share Screen, Record, and Reactions. The Windows taskbar at the very bottom shows the search bar and various application icons.

You can create a referral after the case detail entry from the right side of the page for a student:

Zoom Meeting You are viewing Emily Kinney's screen View Options

Chrome File Edit View History Bookmarks People Tab Window Help box 100% Fri 1:58 PM Emily Kinney

ua-trellis--stage.lightning.force.com/lightning/r/Case/5003J000001Fh7QAE/view?ws=%2Fflightning%2Fr%2FContact%2F003f4000018q5...

Logged in as David McGuiggan (dmcguigg@email.arizona.edu.stage) | Sandbox: STAGE | Log out as David McGuiggan

ARIZONA All Julie Wa

Console Home Phoebe Miriam San... Emily L Kara Julie Ann Wagner

Julie Ann Wagner R-028 00966074

Details **Related**

Case Details (1) New

Case Detail Name	Comments	Owner Alias	Created Date
CD-0987924	reviewed schedule for fall, co...	dmcgu	5/22/2020 1:53 PM

[View All](#)

Referrals (1) New

Referral Name	Referred from	Summary	Created By
R-028	Advising	Referred to Financial Aid on 5...	David McGuiggan

[View All](#)

Case History (1)

Date	Field	User	Original Value	New Value
5/22/2020 1:53 PM	Created.	David McGuiggan		

Conversation Transfer

New Cas...

Create Referral (beta)

Career: Undergraduate

Important

Origin (optional)

In Person

Zoom

Phone

Email

None

* Comment

Salesforce Sans 12

B I U

Unmute Start Video Participants 19 Chat Share Screen Record Reactions

Type here to search

In Chatter is a Referral chat group where users can send their feedback/requests which may be implemented as this feature is further improved. Currently it will be in testing mode to see usage and gain feedback. Danielle B has requested that the specific referred to unit's URL page be provided automatically when that unit REG or Bursar is selected.

Email settings for outgoing emails in Trellis:

Advisor: To set up your email signature for referrals go to "settings" and then create a signature template so you can add your dynamic URL filled signature, otherwise it will be text only format in the referral email sent to student.

The textbox of the referral is open to the student to view in the email and the referred dept, be careful when composing this to provide details you don't want either party to share, per Trellis team.

BLANK

BLANK

Around June 3 Recurring availability is a “coming soon feature”. This means you can create appt or drop-in blocks of time for a set timeframe into the future. If you change an availability, you will only change the one you are clicking on not on all of them, at this time.

You can't change dates/times in the past. You can extend a recurring availability for future dates. That way events are not changed in the past when updating the future availability. See the image below.

Upcoming Updates

Ability to create recurring availability

New Availability

Appointments Drop-in Busy

Your Availability

* Availability Name

* Availability Date Start Time

* Number of Appointments / Duration 1 20 min

End Time End Time will automatically be set based on start time, number of appointments and duration.

Appointment Scheduling Deadline 2 Hours

Make this a recurring weekly availability

Recurring Availability

Frequency Weekly

Days Mon Tue Wed Thu Fri

Stop Recurring After 5/14/20

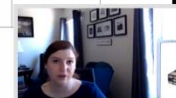
May 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6 9am-11:00am 11am-12:00pm 12pm-1:00pm	7	8	9
10	11	12	13 9am-11:00am 11am-12:00pm 12pm-1:00pm	14	15	16
17	18	19	20 9am-11:00am 11am-12:00pm 12pm-1:00pm	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

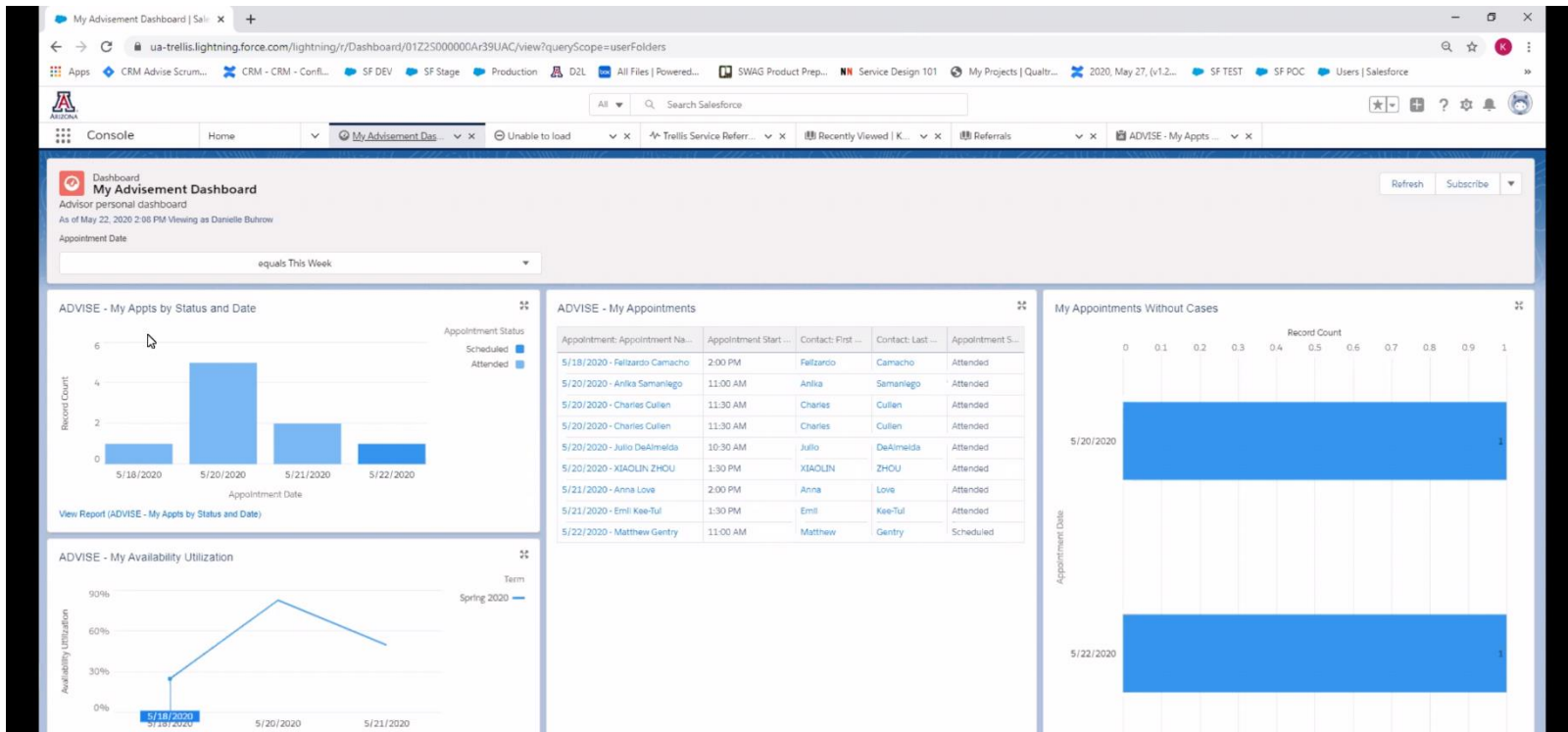
Initial release will include a “Weekly” option with multiple day selector and recurrence end date up to 90 days out. (ex: 10am-12pm every Tuesday and Thursday until July 2021)

Recurrence icon on availability records in the month calendar view

Kirsten Van Datta's screen



In the works now and is being planned: Advising Dashboard, this is not the final look by any means, but an alert that it is being created. Image below of 1st stage, in production.



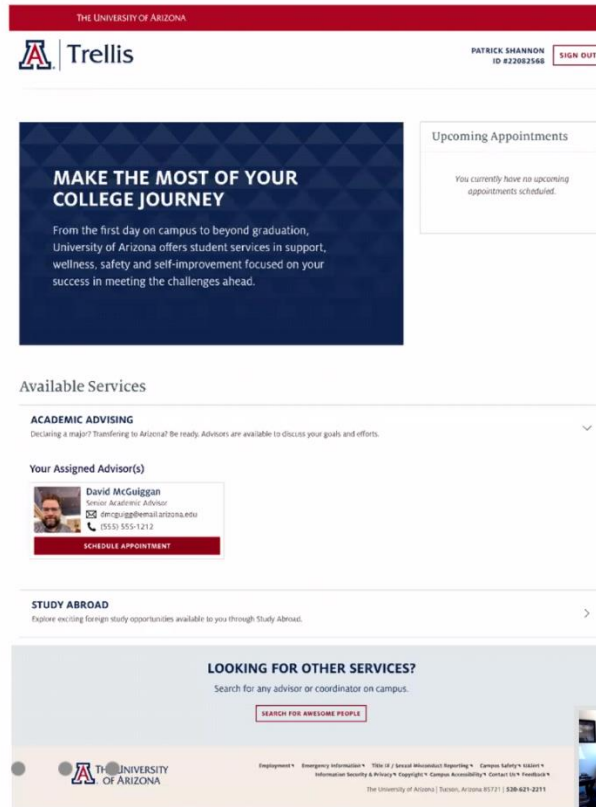
Trellis landing main page will have new updates relevant to the time of semester, “student community expansion” see image below.

Verbiage will come from the relevant units to Trellis for this page.

Upcoming Updates

Student Community Expansion

- Expanding Trellis Advise to show additional services to students
- Will add Financial Aid and other info to assist with student retention’s need to send a student to one location for assistance info



Note: This is a wireframe. Images and content subject to change.
Kirsten Van Datta's screen

In progress and upcoming groups to join Trellis in image below, per Kirsten, only advisors will have access to case detail entries, however, the plan is to allow advisors to view case detail entries from other units like OSFA and Registrar when entered.

Trellis Expansion

Current Groups In Progress

Study Abroad/ISS – *Cases & Case Details, Referrals

Registrar – Scheduling (MCBC, Grad Services & Residency Classification Only), *Cases & Case Details, Forms approval (Cases), Referrals

Dean of Students – *Cases & Case Details, Referrals

Faculty/Instructors – Scheduling, *Cases & Case Details, EPR, Forms approval (Cases)

SSRI Retention – *Cases & Case Details, Referrals, EPR

SSRI (SOS) – Service Desk (service cases)

Financial Aid – Service Desk

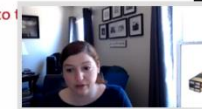
**Next

DRC
THRIVE
Financial Aid
Bursar

*Viewing, editing and creating advising Case Details permissions are granted by Roxie Catts, the data steward of advising case notes. Incoming groups will not receive access to Trellis without permission being granted by Roxie.

**"Next" list is subject to change based on readiness of group(s).

Kirsten Van Detta's screen



Final screen shared in the meeting was the review of past and upcoming updates, image below.

Trellis – Delivered Feature Highlights

March	April	May
Onboarding New Groups (Ongoing)		
<ul style="list-style-type: none">Onboarding Study Abroad/ISSCreate busy blocks on advising calendar to easily remove appointment availabilityUpdated Case Detail workflow to retain data entered from step to stepNo Show email notification to studentsStudent unable to cancel appointment within one hour of appt start timeCOVID-19 Support banner in Trellis Advise student communityPost-advising appointment survey to students (deferring sending to students)Resolved issue with some students not receiving appointment remindersRemove appointment blocks from student view with Busy blocksIN PROGRESS: Outlook integration	<ul style="list-style-type: none">Expansion: Change of "Advise" app to "Console" and removal of Appointment Type to assist with expansion of features for incoming groupsAuto-fill appointment fields from AvailabilityIn addition to in the appointment popover and email notification, also display UAccess Student Center link on the contact pageEnhance Drop-in blocks in student view to help students see additional information about the drop-in is availableAdded information on how to use Zoom in calendar pop-in and appointment confirmationsVarious bug fixes andIN PROGRESS: Outlook integration	<ul style="list-style-type: none">Expanded and set default width on "Comments" column in Case Details tabAdded ability to see Preferred First Name in results when searching for contacts (Searching by Preferred Name is available)Streamlined information displayed in My Appointments Today widget on the calendar pageAdded the ability to track and send Referral (Beta) emails to studentsAdded the ability to call attention to important CasesUpdated the "Major" filter in the student's Advisor Search to include "No Major Selected" optionsAutomated sync from Trellis to OutlookVarious bug fixesIN PROGRESS: Outlook, Ability to create recurring availabilities, advising dashbo

Kirsten Van Detta's screen

