SECTION 18 CONFIGURE THE DROP-IN SCREEN

18.0 Overview

The *Student Drop-in* screen lists students who arrive for an unscheduled visit in the order of arrival and is used to assign those students to an advisor.

System administrators will use the *Configure Drop-ins* option to (1) establish the desired default settings for the selected Location, (2) establish whether users may change settings for their own logins, and (3) establish an option by which the system administrator can individualize configuration settings to the Drop-in screen for an individual user.

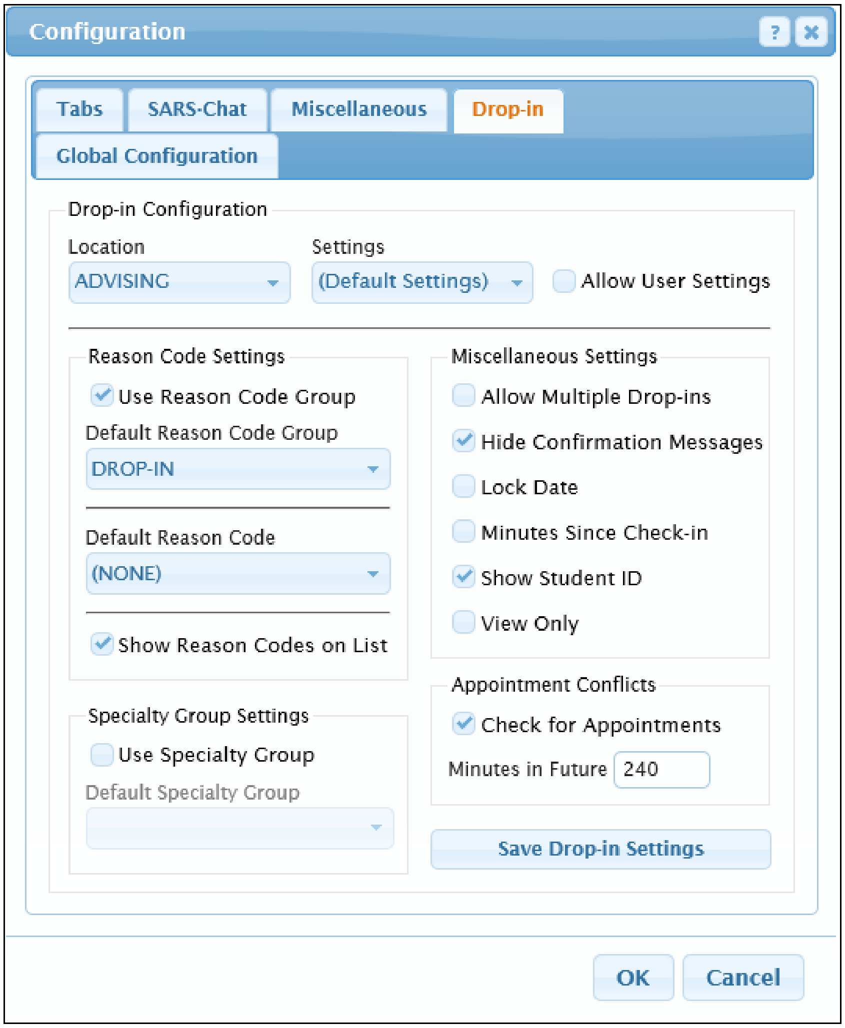
18.1 Initial Configuration Steps

The system administrator for a Location must first configure the default settings for the *Drop-in* screen. This is a one-time process, unless changes to the default settings are required, and may be performed at any computer used in the selected Location. The settings will apply globally to all computers using the Drop-in feature for that Location.

1. Log in to the **SARS Anywhere** web application.

2. Click the **Configuration** icon.

3. Click the **Drop-in** tab. Here is an example:



Drop-in Configuration		
Panel	**Option**	**Description**
Drop-in Configuration	Location	Use to select the Location for which the Drop-in settings will apply.
	Settings	Use to select “Default Settings” for an entire Location. Or use to select a single user for whom individual Drop-in settings will apply. All users in the selected Location will be displayed on the list.
	Allow User Settings	[Displayed if the user has access rights to Drop-ins/Change Configuration.] Use to specify that users who do not have system administration access rights will be able to select alternate settings from the *Drop-in Configuration* screen for their own PC.
	Local Admin Settings	[Toggles from Allow User Settings after a User Name is selected] Use to allow the system administrator to make changes to the Drop-in settings for a specific user logon.

Drop-in Configuration		
Panel	**Option**	**Description**
Reason Code Settings	Use Reason Code Group	Use to activate the option to use Reason Code Groups.
	Default Reason Code Group	[Enabled if Use Reason Code Group is checked] Use to select the Reason Code Group in order to limit the choice of reasons on the Student Drop-In Screen. Only those Reason Codes that are assigned to the selected Default Reason Code Group will be displayed.
	Default Reason Code	Use to select the Reason Code that will be inserted automatically when a student is registered on the Drop-in List.
	Show Reason Codes on List	Use to display Reason Codes on the Drop-in Screen. If this option is checked, another column will be placed on the screen with the title “Reason Code(s).”
Specialty Group Settings	Use Specialty Group	Use to activate the option to use Specialty Groups.
	Default Specialty Group	[Enabled if Use Specialty Group is checked] Use to select the code to be used as the default (e.g., ADJUNCT). Only those advisors who have been assigned to that group will be displayed on the *Student Drop-in Appointment* screen.
Miscellaneous Settings	Allow Multiple Drop-ins	Use to allow a student to be listed on the waiting list more than once in cases where the student may have more than one consecutive drop-in session.
	Hide Confirmation Messages	Use to eliminate the confirmation messages that otherwise would be displayed when a student is being added to or selected from the list.
	Lock Date	Use to lock the screen to display only the current date.
	Minutes Since Check-in	Use to display the time that has elapsed since check-in, in lieu of the student’s check-in time.
	Show Student ID	Use to allow a student’s primary identifier to be displayed on the Drop-in list (e.g., Student ID, Guest ID, Banner ID, Colleague ID, PeopleSoft ID).
	View Only	Use to prevent users on the computer from taking any action on the *Student Drop-In Appointment* screen other than viewing the list of students. This will override any scheduling access rights that a user might have.
Appointment Conflicts	Check for Appointments	Use to have the system check for any booked appointments in any Location using the database that will potentially conflict with this drop-in activity, based on the time that the student is being added to the Drop-in list and the setting for Minutes in Future.

Drop-in Configuration		
Panel	**Option**	**Description**
	Minutes in Future	Use in conjunction with Check for Appointments. The purpose of this feature is to trigger a warning message if an appointment exists for the student in any Location within the database that would conflict with the current drop-in visit. Use to specify the number of minutes beyond the present time to check for any conflicts (e.g., 240 minutes).
Save Drop-in Settings		Use to store the selections and remain on the screen.
OK		Use to approve any entries or changes and exit the screen.
Cancel		Use to exit the screen without saving.

4. Click **Location ▼** and select the Location for which the default Drop-in settings will apply.

5. Click **Settings ▼** and select [Default Settings] to have the settings apply to all users in the selected Location, if this option is not already selected.

6. Click the checkbox for **Allow User Settings** only if individual users in the Location will be permitted to configure their own Drop-in settings.

7. In the <u>Reason Code Settings</u> panel,

   a. Click **Use Reason Code Group** to activate the option to use Reason Code Groups on the *Drop-in Appointment* screen.

   b. Click **Default Reason Code Group ▼** and select the desired Code (e.g., DROPIN). Only those Reason Codes that have been assigned to that group will be displayed on the *Drop-in Appointment* screen.

   c. Click **Default Reason Code ▼** and select the code to be used as the default (e.g., NONE) to be inserted automatically when a student registers. The user may then select a more specific reason for the visit, which will generate more meaningful data for reporting.

   d. Check **Show Reason Codes on List** to display Reason Codes on the *Drop-in Appointment* screen.

8. In the <u>Specialty Group Settings</u> panel,

   a. Click the checkbox for **Use Specialty Group** to limit the choice of advisors on the *Drop-in Appointment* screen

   b. Then click **Default Specialty Group ▼** and select the desired code. Only those advisors who have been assigned to that group will be displayed on the *Student Drop-in Appointment* screen.

9. In the <u>Miscellaneous Settings</u> panel,

   a. Check **Allow Multiple Drop-ins** to allow a student's name to be placed on the waiting list at the same time. This allows the student to check in at one time for multiple drop-in sessions rather than having to re-check in after finishing the prior session. The option keeps the placement of the student's name at the original check-in time sequence.

  b. Check **Hide Confirmation Messages** to prevent confirmation messages from being displayed when a student is being added to or selected from the list.

  c. Check **Lock Date** to disable the Date field on the Drop-in list. Only the current date will be displayed in this mode.

  d. Check **Minutes Since Check-in** to display the time that has elapsed since check-in in lieu of the student's check-in time.

  e. Check **Show Student ID** to display the student's primary identifier on the Drop-in list.

  f. [Do not use as a default setting] Check **View Only**, which prevents users on the computer from taking any action on the screen other than viewing the list of students, only if unique settings for a specific computer are being established.

10. In the Appointment Conflicts panel,

  a. Check **Check for Appointments** to have the system check for appointments in any Location using the database that might conflict with the drop-in visit.

  b. Check **Minutes in Future** and specify the number of minutes beyond the present time that the system should look for a scheduled appointment that might conflict with the drop-in visit (e.g., 240 minutes).

11. Click **Save Drop-in Settings**.

12. Click **Close**. The default settings will be established for all users within that Location.

18.2 Change Default Settings (Local Admin Settings)

If users are not permitted to change the settings on the *Drop-in Configuration* screen, another option exists to allow the system administrator to make changes for a specific user logon. This option may be desired for shared workstations at the front counter.

1. The system administrator signs into SARS Anywhere on any computer using the system administrator's user name and password.

2. Click the **Configuration** icon.

3. Click the **Drop-in** tab.

4. Select the desired Location.

5. Click **Settings ▼** and select the user's name. The Allow User Settings field toggles to Local Admin Settings.

6. Click **Local Admin Settings**.

7. Proceed to individualize the settings. These settings will be effective only for the user name selected in step 5, above.

8. Click **Save Drop-in Settings**.

9. Click **Close**. The drop-in configuration settings will be established for that user's logon.

10. Repeat steps 5 through 9 for any other users for whom the workstation should be individualized.