



# DATABASE HANDBOOK

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CENTER FOR WRITING  
STUDENT WRITING SUPPORT

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# USING THE DATABASE

It is important that nobody gets mad at you for screwing up. We know screwups are an essential part of making something good. That's why our goal is to screw up as fast as possible.

—Lee Unkrich, director of *Toy Story 3*, qtd in wired.com/magazine/2010/05/process\_pixar/

This handbook begins with Unkrich's philosophy because, especially where learning to use the database is concerned, we expect—and are not mad about—screwups. Not only is the database flexible and forgiving of mistakes, but many of its best functionalities and features are the results of screwups on all levels, and of the ideas and suggestions that emerge from those screwups. So, as you read about and use the database, please remember that everybody makes mistakes with it, and that we (and it) get better as a part of that mistake-making process—in fact, we hope you will play with the database as you familiarize yourself with it, so that you can start to “screw up as fast as possible.”

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## WHAT'S THE DATABASE?

The database is a homegrown web application that all SWS employees use before, during, and after every consultation; in addition, the database is the tool whereby all employees are scheduled to work, and where we can all track visits and other information about sessions, writers, and usage data. All consultants use the Center database to log writers in to sessions, to write post-session comments, to see their schedules for the day, and to use the staff blog.

Consultants who work in Appleby, APARC, and TRIO additionally use the database to create “visits” (the database’s word for a consulting session—more on database terminology on the next page), log writers in, and write visit comments. Consultants who work in SWS.online conduct all their readings and chats in the database.

Attendants use the database to check in writers, create Nicholson appointments, and manage the Center schedule. And later this year, everyone will also be able to use the database to request subs or make offers to sub for others.

This handbook begins by describing basic database terminology, procedures, and functions that all employees need to know; subsequent sections describe Nicholson- and Appleby-specific database procedures and functions. The last section of this handbook describes more advanced database features that are good for all consultants to learn eventually.

### HOW DO I LOG IN TO THE CONSULTING COMPUTERS?

All eight Macs at consulting tables in Nicholson, all six Macs at consulting tables in Appleby, and all the extra staff computers (room 10 in Nicholson and room 9 in Appleby) are password-protected.

Even though all our techies, past and present, would be appalled if they saw that we were writing this out on paper, here’s what you need in order to log in to a consulting machine:

Username: **consultant**

Password: **gtmfSWS@c4w**

Helpful mnemonic: this password is mostly made up of the first letters on the info sheets available at each consulting spot—getting the **most** from Student Writing Support—plus “at” and our shorthand for Center for Writing (“C4W”).

## LOGGING IN TO AND OUT OF THE DATABASE

The Student Writing Support database is located at <https://c4w.cla.umn.edu/sws>. When accessing the database, always use the web browser Chrome, which is available on all consulting and lab computers, to go to the URL. (Elements of other web browsers are incompatible with the database.) You will then need to log in.

### THE FIRST TIME YOU LOG IN

1. Use your X500 username and enter the generic password **Staff2019**.
2. Immediately after this first-time login, go to the **Staff** menu in the upper toolbar and select **Edit My Profile** from the dropdown menu.
3. Enter the old password (**Staff2019**) and then enter a new password of your choosing (twice). Database passwords must use at least eight characters and must include at least one numeral. After the first time you log in, you will use your new password each time.
4. Click the **Change password** button.

### ALL SUBSEQUENT TIMES YOU LOG IN

Simply use your X500 username and your new password.

### EVERY TIME YOU USE THE DATABASE

When you are finished, be sure to log out of the database: click **Logout** on the toolbar rather than simply closing the browser window. The University takes the protection of all student information seriously, so this logout step is essential.

## DATABASE TERMS

In the following instructions, you'll need to be familiar with four basic terms:

**Schedule:** A time slot associated with a consultant or attendant at work. In Nicholson and in SWS.online, schedule slots are 45 minutes each; in Appleby, APARC, and Trio, and for Attendants, schedule slots typically range from 45 minutes to 180 minutes (3 hours).

**Purpose:** A term used to distinguish ways in which a schedule can be used. Basic purposes include the following:

- By-Appt:* A schedule designed for a 40-minute Nicholson consultation
- Walk-in:* A schedule designed for walk-in consultations in Appleby APARC, or Trio
- Online:* A schedule designed for SWS.online consultations
- Attending:* A schedule reserved for attending.
- Project:* A schedule reserved for a project—usually a meeting or professional development work.
- Out:* A schedule unavailable for anything—the consultant or attendant will not be present.

**Visit:** Once a Walk-in, By-Appt, or Online schedule slot has a writer associated with it, the schedule becomes a visit.

**Status:** The status of a visit is generally a function of time plus the presence/absence of a writer. There are five statuses:

- Upcoming:* This By-Appt visit has yet to take place, and the writer is not yet present at 15 Nicholson or waiting in mySWS for an SWS.online chat.
- Waiting:* This By-Appt visit has yet to take place, and the writer is present at 15 Nicholson or in mySWS and is waiting for the consultant to join them.
- Being-seen:* The writer and the consultant are currently meeting.
- Completed:* The writer completed a visit with the consultant.
- Cancelled:* The writer cancelled this By-Appt visit (by calling or stopping by Nicholson or by using mySWS).
- No-show:* The writer failed to appear for this By-Appt visit, and failed to cancel.

## DATABASE MENUS

Everything in the database is controlled by the five menus at the top of every page:

Katie L.		C4W Home	Visits	Schedules	Staff	Logout
C4W Home	Clicking here opens the Center's home page in a new window.					
Visits	where you can return to the <b>Today's Visits</b> page; <b>create a visit</b> in Nicholson, Appleby, or APARC; find specific <b>center visits</b> ; and <b>find a student</b>					
Schedules	where you can find, view, and manipulate specific schedules and create new schedules					
Staff	where you can return to your <b>Consultant Home</b> page; track your own statistics; change your password (under Edit My Profile); indicate your availability when it's time to request a new schedule; and access the staff blog					
Logout	Clicking here is the only way to securely log out of the database.					

# CONSULTANT HOME PAGE

The Consultant Home page is your home base when you are consulting—it will show up as soon as you log in. (Attendants use the **Today's Visits** page as a home base during their attending shifts.)

The screenshot shows the Consultant Home page with several sections:

- Visits:** Shows a table of scheduled visits for the day. The table has columns for ID, Time, Client, Course, Mode, Location, Status, Chkin, Login, and Logout. There are 4 visits listed.
- Schedules:** Shows a table for a walk-in shift at 12:30 in Appleby.
- Uncommented:** A section stating "No uncommented visits."
- Blog's latest:** A table listing the last 10 blog posts with columns for ID, Title, Author, Update type, and Update time.

In this view of the **Consultant Home** page, we can see all the consultant's scheduled activity for the day, along with any un-commented visits to complete and the last 10 posts on the staff blog. At the top, note the **Visits** section, which includes all visits for the current day, followed by the **Schedules** section, which includes a walk-in shift scheduled to start in Appleby at 12:30. Below the Schedules section is the **Uncommented** section, which would include reminders for visits that the consultant had yet to comment upon (Zack has finished all his comments!). At the bottom is the **Blog's latest** section, which lists the last 10 entries and comments on the blog.

## VISIT DETAIL PAGE

including writer information

In database terms, every consultation is a “visit,” and every visit is associated with a writer. Consultants use Visit Detail pages, with their information about the project the writer is working on and about the writer themselves, to prepare for and record their visits with individual writers. Consultants typically access visit detail pages from their Consultant Home page, where they can click an individual Visit ID:

Zack P.				C4W Home	Visits	Schedules	Staff	Logout			
Consultant Home									Friday, May 6th 2016 - Spring 2016		
Visits	ID	Time	Client	Course	Mode	Location	Status	Chkin	Login	Logout	Number of visits: 4
	147419	9:00	Rik Blyleven ( <b>Bert</b> )	PHYS 2303: Physics of Matter	👤	Nicholson	Upcoming	Chkin			
	147420	9:45	David Ortiz	NFC 0000: Not for credit	👤	Nicholson	Upcoming	Chkin			
	147421	10:30	Justin Morneau	WRIT 1301: University Writing	👤	Nicholson	Upcoming	Chkin			
	147422	11:15	Joseph Mauer ( <b>Joe</b> )	KIN 3114: Prev/Care: Athletic Injuries	👤	Nicholson	Upcoming	Chkin			

Number of schedules: 1

Clicking on the Visit ID opens that specific Visit Detail page, as in the image below:

Zack P.				C4W Home	Visits	Schedules	Staff	Logout																										
Visit Detail									Friday, May 6th 2016 - Spring 2016																									
<a href="#">Visit</a> <a href="#">Comment</a> <a href="#">Actions</a>			<a href="#">Add Visitor</a>   <a href="#">Remove Visitor</a>   <a href="#">Edit Status</a>																															
<b>Rik Blyleven</b>																																		
<input checked="" type="radio"/> Current semester: 0 completed, 1 upcoming <input type="radio"/> Lifetime: 0 completed																																		
<table border="1"> <tr> <th>ID</th> <th>Date</th> <th>Time</th> <th>Consultant</th> <th>Status</th> <th>Mode</th> </tr> <tr> <td>147419</td> <td>Fri, 05/06/2016</td> <td>9:00</td> <td>Zack Pierson</td> <td>Upcoming</td> <td>👤</td> </tr> </table>						ID	Date	Time	Consultant	Status	Mode	147419	Fri, 05/06/2016	9:00	Zack Pierson	Upcoming	👤	<table border="1"> <tr> <td>ID + email</td> <td>2828280   circlem@umn.edu</td> </tr> <tr> <td>Name</td> <td>*Rik Blyleven</td> </tr> <tr> <td>Pref. Name</td> <td>Bert</td> </tr> <tr> <td>Pronunciation</td> <td>"BLY-le-ven"</td> </tr> <tr> <td>Career</td> <td>UGRD</td> </tr> <tr> <td>Major</td> <td>Statistics</td> </tr> <tr> <td>College</td> <td>CLA</td> </tr> </table>			ID + email	2828280   circlem@umn.edu	Name	*Rik Blyleven	Pref. Name	Bert	Pronunciation	"BLY-le-ven"	Career	UGRD	Major	Statistics	College	CLA
ID	Date	Time	Consultant	Status	Mode																													
147419	Fri, 05/06/2016	9:00	Zack Pierson	Upcoming	👤																													
ID + email	2828280   circlem@umn.edu																																	
Name	*Rik Blyleven																																	
Pref. Name	Bert																																	
Pronunciation	"BLY-le-ven"																																	
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Major	Statistics																																	
College	CLA																																	
									<a href="#">Add</a>																									
<table border="1"> <tr> <th>Sch ID</th> <th>Date</th> <th>Time</th> <th>Consultant</th> <th>Length</th> <th>Purpose</th> <th>Requested</th> <th></th> <th></th> </tr> <tr> <td>143935</td> <td>Fri, 05/06/2016</td> <td>9:00</td> <td>Zack Pierson</td> <td>45</td> <td>By-appt</td> <td><a href="#">yes</a></td> <td><a href="#">edit</a></td> <td><a href="#">remove</a></td> </tr> </table>						Sch ID	Date	Time	Consultant	Length	Purpose	Requested			143935	Fri, 05/06/2016	9:00	Zack Pierson	45	By-appt	<a href="#">yes</a>	<a href="#">edit</a>	<a href="#">remove</a>											
Sch ID	Date	Time	Consultant	Length	Purpose	Requested																												
143935	Fri, 05/06/2016	9:00	Zack Pierson	45	By-appt	<a href="#">yes</a>	<a href="#">edit</a>	<a href="#">remove</a>																										
<table border="1"> <tr> <td>Course:</td> <td>PHYS 2303: Physics of Matter</td> <td>Status:</td> <td>Upcoming</td> </tr> <tr> <td>Location:</td> <td>15 Nicholson Hall</td> <td>Checkin:</td> <td></td> </tr> <tr> <td>Mode:</td> <td>Face-to-face</td> <td>Login:</td> <td></td> </tr> <tr> <td>Created on:</td> <td>08/23/2016 10:40:29</td> <td>Logout:</td> <td></td> </tr> <tr> <td>Reserve type:</td> <td>Regular</td> <td>Flags:</td> <td></td> </tr> </table>						Course:	PHYS 2303: Physics of Matter	Status:	Upcoming	Location:	15 Nicholson Hall	Checkin:		Mode:	Face-to-face	Login:		Created on:	08/23/2016 10:40:29	Logout:		Reserve type:	Regular	Flags:										
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Mode:	Face-to-face	Login:																																
Created on:	08/23/2016 10:40:29	Logout:																																
Reserve type:	Regular	Flags:																																

You will learn more about the Visit Detail page in the following sections on using the database in Appleby and Nicholson. For now, just note that the Visit Detail page in the image above contains not only information about the visit itself (the date, time, and consultant, as well as the course for which the client is writing), but also **about the writer—information that is important for the consultant to know before a consultation begins.**



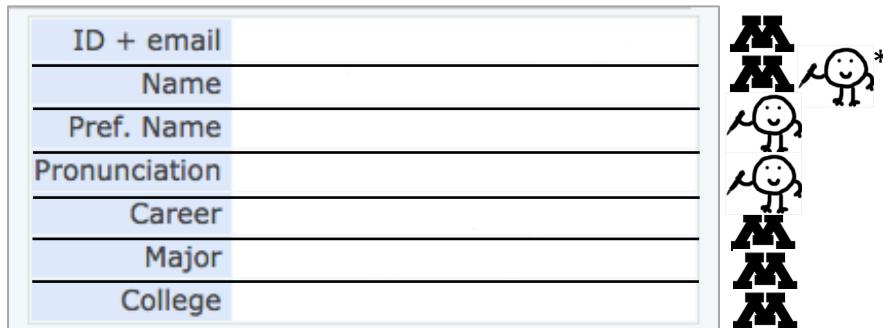
Because the heart of consulting is one-to-one conversation, it's important to be attentive to what each writer has chosen to share with us about their learning style, their goals for a consultation, or other parts of their identity that they want us to know about. Writers can let consultants know this information via the Student Profile. Writers use mySWS (writing.umn.edu/mySWS), the student access point to portions of the SWS database, to edit their profiles. In order to respect the writers with whom they work, consultants read the student profile information of each writer before meeting with them, and rely on name and pronoun information when writing visit comments.

Besides providing a space for a preferred name/nickname, the Student Profile also invites users to include a guide to pronouncing their name, to indicate their gender pronouns of reference, to list any language(s) they speak and/or write, to let SWS.online consultants know about any accommodations they might need when reading online text, and/or to tell us anything else they'd like SWS consultants to know about them as writers/learners.

Clicking on and reading what's in the writer information box before each session, as well as when you write visit comments, will help ensure that the writer feels respected and has their needs met as much as possible.

## HOW DO I LEARN WHAT WRITERS HAVE SHARED IN THEIR STUDENT PROFILE?

As an SWS employee with access to the database, you can find information about a writer, including Profile info, on every Visit Detail page—all the information we have will be in the box on the upper-right-hand corner. Below is an empty version of that box. The Minnesota “M”s and Mr. Grapes that we’ve included here indicate which where the info in each line comes from: **Data Warehouse (Minnesota M)** and/or **the writer themselves (Mr. Grape)**.<sup>1</sup>



These rows will always be populated with **information pulled straight from Data Warehouse**.



These rows may be empty; anything in these rows is information that has been **provided by the writer** during a session or via mySWS. Information in these rows is optional.



This row will always have the writer’s listed name (from **Data Warehouse**), and if the name has an asterisk (\*) next to it, that will also indicate that there is **additional information provided by the writer**. You won’t see that information in this box, but you can see it by clicking on the writer’s listed name.

What you see in the box containing student information will depend on whether a writer has provided additional information, and on what type of additional information they have provided.

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<sup>1</sup> Those icons don’t show up in the database; they are just bonus features for your handbook-reading edification and entertainment. We aim to please.

## VIEWING THE STUDENT PROFILE

1. Open the visit detail page and note what is already available for you to read. The image below shows information about the writer's ID and email, full name in Data Warehouse, preferred name, "career" (Grad or Undergrad), major, and college at the U. Because there is an asterisk (\*) next to the writer's Data Warehouse-provided name, you know that the writer wants you to be aware of additional information about their gender pronouns, language background, SWS.online needs, or writing/learning style.

**Visit Detail**      Tuesday, September 3rd 2019 - Fall 2019

Visit	Comment	Actions															
<b>Joseph Mauer</b> <input checked="" type="radio"/> Current semester: 0 completed, 2 upcoming <input type="radio"/> Lifetime: 0 completed																	
ID	Date	Time	Consultant														
173886	Wed, 09/18/2019	11:15	Jake Grossman														
173889	Thu, 09/05/2019	9:00	Sen Xiong														
Status	Mode																
Upcoming																	
<input type="button" value="Add Visitor   Remove Visitor"/>																	
<table border="1"> <tr> <td>ID + email</td> <td>7000000   jmauer@umn.edu</td> </tr> <tr> <td>Name</td> <td>2 *Joseph Mauer</td> </tr> <tr> <td>Pref. Name</td> <td><b>Joe</b></td> </tr> <tr> <td>Pronunciation</td> <td></td> </tr> <tr> <td>Career</td> <td>UGRD</td> </tr> <tr> <td>Major</td> <td>Kinesiology B S</td> </tr> <tr> <td>College</td> <td>EHD</td> </tr> </table>				ID + email	7000000   jmauer@umn.edu	Name	2 *Joseph Mauer	Pref. Name	<b>Joe</b>	Pronunciation		Career	UGRD	Major	Kinesiology B S	College	EHD
ID + email	7000000   jmauer@umn.edu																
Name	2 *Joseph Mauer																
Pref. Name	<b>Joe</b>																
Pronunciation																	
Career	UGRD																
Major	Kinesiology B S																
College	EHD																

2. Click the writer's listed name to reveal what additional information they have provided. In the image below, you can see that the writer has not only provided a preferred name, but also gender pronouns and additional information.

**Visit Detail**      Tuesday, September 3rd 2019 - Fall 2019

Visit	Comment	Actions																	
<b>Joseph Mauer</b> <input checked="" type="radio"/> Current semester: 0 completed																			
ID	Date																		
173886	Wed, 09/18/2019																		
173889	Thu, 09/05/2019																		
Sch ID	Date																		
194491	Thu, 09/05/2019																		
Course:																			
Location:																			
Mode:																			
Created on:																			
Reserve type:																			
<input type="button" value="Add Visitor   Remove Visitor"/>																			
<table border="1"> <tr> <td>Name:</td> <td>Joseph Mauer</td> </tr> <tr> <td>My preferred name:</td> <td>Joe</td> </tr> <tr> <td>How to pronounce my name:</td> <td></td> </tr> <tr> <td>Pronouns I use to describe myself: (example: she/her, he/him, they/them, etc.)</td> <td>he/him</td> </tr> <tr> <td>Language(s) I speak and/or write:</td> <td></td> </tr> <tr> <td>Anything I'd like consultants to know about my ability to perceive color or other accommodations I might need when reading the standard Google Doc highlighting and commenting features:</td> <td></td> </tr> <tr> <td>Additional information I'd like SWS consultants to know about me as a writer/learner:</td> <td>I really like constructive criticism, and I welcome a challenge.</td> </tr> <tr> <td colspan="2"> <input type="button" value="Close"/> </td> </tr> </table>				Name:	Joseph Mauer	My preferred name:	Joe	How to pronounce my name:		Pronouns I use to describe myself: (example: she/her, he/him, they/them, etc.)	he/him	Language(s) I speak and/or write:		Anything I'd like consultants to know about my ability to perceive color or other accommodations I might need when reading the standard Google Doc highlighting and commenting features:		Additional information I'd like SWS consultants to know about me as a writer/learner:	I really like constructive criticism, and I welcome a challenge.	<input type="button" value="Close"/>	
Name:	Joseph Mauer																		
My preferred name:	Joe																		
How to pronounce my name:																			
Pronouns I use to describe myself: (example: she/her, he/him, they/them, etc.)	he/him																		
Language(s) I speak and/or write:																			
Anything I'd like consultants to know about my ability to perceive color or other accommodations I might need when reading the standard Google Doc highlighting and commenting features:																			
Additional information I'd like SWS consultants to know about me as a writer/learner:	I really like constructive criticism, and I welcome a challenge.																		
<input type="button" value="Close"/>																			
<table border="1"> <tr> <td>requested</td> <td>yes</td> <td>edit</td> <td>remove</td> </tr> <tr> <td colspan="4">Upcoming</td> </tr> </table>				requested	yes	edit	remove	Upcoming											
requested	yes	edit	remove																
Upcoming																			

Now that you know the writer's gender pronouns, you can use those pronouns when referring to the writer in the third person, including when you write your visit comments. And now that you have read the "additional information" box, you also know a little bit more about what the writer expects from you as a consultant.

## REMEMBERING WHAT YOU DON'T KNOW

The Student Profile is equally important for revealing what you *don't* know—great practice for not making assumptions! For example, the picture of the Visit Detail page below does provide a great deal of information, about the writer, Lionel Messi, including the typical information from Data Warehouse, plus writer-provided information about Lionel's preferred name and a guide to pronouncing it, as well as an asterisk indicating that Lionel has provided more information:

Tuesday, September 3rd 2019 - Fall 2019

[Add Visitor | Remove Visitor](#)

Lionel Messi					
● Current semester: 0 completed, 1 upcoming			● Lifetime: 0 completed		
ID	Date	Time	Consultant	Status	Mode
173878	Tue, 09/03/2019	14:15	Pierre Abillama	Upcoming	
ID + email	2461987   GOAT@umn.edu				
Name	<b>*Lionel Messi</b>				
Pref. Name	<b>Lionel</b>				
Pronunciation	"Lee-yo-nel"				
Career	GRAD				
Major	PhilosophyB A				
College	CLA				
Add					
Sch ID	Date	Time	Consultant	Length	Purpose
194739	Tue, 09/03/2019	10:30	Sourojit (G) Ghosh	45	By-appt
195730	Tue, 09/03/2019	12:45	Pierre Abillama	45	By-appt
195885	Tue, 09/03/2019	14:15	Pierre Abillama	45	By-appt
Course: PHIL 3201: Free Will and Responsibility				Status:	Upcoming
Location: 15 Nicholson Hall				Checkin:	
Mode: Face-to-face				Login:	
Created on: 07/23/2019 14:55:07				Logout:	
Reserve type: Regular				Flags:	

Clicking on Lionel's name reveals that Lionel has provided a number of languages and some (playful) information about accommodations and learning style, but no information about gender pronouns.

Name: Lionel Messi

?	My preferred name:	Lionel
?	How to pronounce my name:	LEE-yo-nel
?	Pronouns I use to describe myself: (example: she/her, he/him, they/them, etc.)	
?	Language(s) I speak and/or write:	Spanish, English, Catalan, Portuguese
?	Anything I'd like consultants to know about my ability to perceive color or other accommodations I might need when reading the standard Google Doc highlighting and commenting features:	Technology doesn't work ... VAR is a scam.
?	Additional information I'd like SWS consultants to know about me as a writer/learner:	I like to revise. Specifically, I've rewritten the history of the beautiful game with my feet.

[Close](#)

When you work with Lionel or write visit comments, you will not know what, if any, gender pronouns Lionel wants to use in the context of Student Writing Support visits. That means that when you write your visit comment, you will have a couple of options. You could use Lionel's name or an initial ("I gave Lionel a commas quicktip, and then L and I worked on comma use together. L's final draft is due later today."). Or, you could use *they/them* as a pronoun in its gender-neutral sense. No matter what, please do not assume you know a writer's gender identity based on how you perceive them.

# USING THE DATABASE IN APPLEBY

In Appleby, you will use the database for three main purposes: creating and recording visits, managing the sign-in list, and keeping aware of other consultants' schedules (to help with the flow of people starting and finishing a shift).

## CREATING AN APPLEBY VISIT

If you are consulting in Appleby, you will be selecting writers from the sign-in list located on the [Create an Appleby Visit](#) page. As explained in the FAQs and Policies section of the Consulting handbook, writers are given a priority status:

Writers with **green priority** are good to go. That is, **they have not yet had a visit today, nor have they had two this week.**

Writers with **amber priority** are also good to go—as long as they are willing to give up an upcoming Nicholson appointment. (The sign-in list codes them as amber to indicate that **they have an upcoming appointment later today, or that they have what would be a second appointment later this week.**)

Writers with **red priority** must wait until all others with green or amber priority have seen a consultant, even if those others arrive after the red-priority writer. (The sign-in list codes them as red to indicate that **they have already completed or no-showed at least one visit today or two this week.**)

See Appendix A: Priority Status Flowcharts, starting on page 37, for more information on what priority status means for a writer's visit options. The diagrams in Appendix A may also be helpful for explaining priority status to writers with questions on what priority status means for them.

## USE THE VISITS MENU TO CHOOSE "CREATE AN APPLEBY VISIT"

Click or hold the mouse pointer over the **Visits** menu at the top of the screen and select the **Create an Appleby Visit** option. The **Create a walk-in visit** page will appear (see image below).

The screenshot shows a web-based application titled "Create a walk-in visit". At the top, there are dropdown menus for "Location: 9 Appleby Hall" and "Consultant: Katie Levin". Below these, a table lists clients waiting for a consultant. The table has columns for "Time", "Client", "Requested consultant", "Priority", and "Status". The rows are color-coded: yellow for Justin Morneau (10:30:40 AM), light green for Seimone Augustus (10:31:00 AM), light green for Rik Blyeven (Bert) (10:31:37 AM), light green for Bernard Williams (Bernie) (10:35:06 AM), pink for Robert Sheppard (Bob) (10:32:00 AM), and pink for Jason Kubel (10:37:00 AM). The "Requested consultant" column shows Pat Eliason for Bert and Alysha Bohanon for Bernie. The "Priority" column shows amber for Justin, green for Seimone, green for Rik, green for Bernard, red for Robert, and red for Jason. The "Status" column shows "select" and "turn-away" for each row. At the bottom right of the table is a link "Add/Remove/Edit".

Create a walk-in visit		Friday, September 13th 2013 - Fall 2013		
Location: 9 Appleby Hall		Consultant: Katie Levin		
Waiting		Turned-away	Withdrawn	
Time	Client	Requested consultant	Priority	Status
10:30:40 AM	Justin Morneau		amber	select turn-away
10:31:00 AM	Seimone Augustus		green	select turn-away
10:31:37 AM	Rik Blyeven (Bert)	Pat Eliason	green	select turn-away
10:35:06 AM	Bernard Williams (Bernie)		green	select turn-away
10:32:00 AM	Robert Sheppard (Bob)		red	select turn-away
10:37:00 AM	Jason Kubel	Alysha Bohanon	red	select turn-away

Katie, the consultant, has opened the **Create an Appleby Visit** page. Several writers are waiting to work with a consultant. Note that writers with Amber and Green status appear in chronological order of sign-in, with red-status writers at the bottom of the list regardless of their arrival time.

Make sure that your name is what's listed in the "Consultant" box on the upper right. (If someone else's name is there, that means they probably forgot to log out of the database. You can just select your own name from

the dropdown menu to record this visit.) Note the name at the top of the “Waiting” list, go over to the waiting writers, and call the name.

## WHAT IF THE WRITER IS NOT IN THE ROOM?

Return to your computer and “turn away” the writer (see Managing the sign-in list: turning away a writer, page 17), then select the next person on the list.

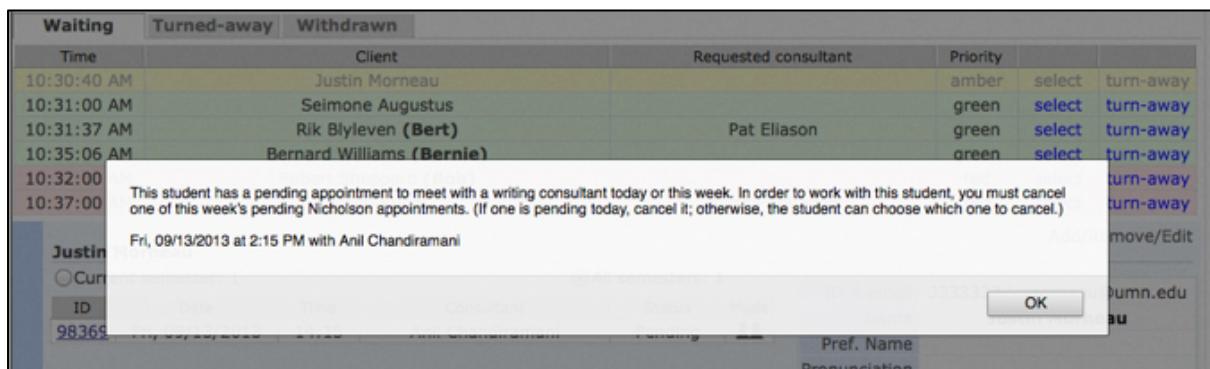
## WHAT IF THE WRITER AT THE TOP OF THE LIST HAS REQUESTED ANOTHER CONSULTANT?

Ask the writer if they still want to wait for that consultant; they may have tired of waiting and would rather work with the first available consultant, or it may be that the requested consultant won’t have time to start another visit. (You can figure this out by looking at **Schedules > View Appleby Schedules**.) If they would rather continue waiting, then select the next person on the list.

## USING PRIORITY STATUS RULES, BEGIN TO CREATE THE VISIT

Once you and the writer have returned to the consulting table, follow these guidelines:

- If the writer has **green priority**, go ahead and click the “select” link next to the writer’s name, then create the visit (proceed to the next step: **ENTER DEPARTMENT AND COURSE INFORMATION**).
- If the writer has **red priority**, go ahead and click the “select” link next to the writer’s name, then create the visit (proceed to the next step: **ENTER DEPARTMENT AND COURSE INFORMATION**).
  - Note that when you select a writer with red priority, a pop-up will remind you that they have already had one visit today or two this week. Because that writer is at the top of the list, you can follow the instructions to type **OVERRIDE** into the box.
- If the writer has **amber priority**, let them know that you’ll need to cancel one of their upcoming visits for this week before you can meet with them. If you try to click “select” next to the name of a writer with amber priority, you will get the following pop-up:



In this example, Justin is at the top of the sign-in list, but Justin’s status is amber because, as the pop-up reveals, Justin has an upcoming visit with Anil later today.

## OPTIONS WHEN A WRITER HAS AMBER PRIORITY

If the writer at the top of the sign-in list has **amber priority**, tell them that you can work with them only if you cancel their upcoming visit. If they agree to this option, follow these steps:

1. Go to **Visits > Find a Student**, then enter their name/ID or x500.
2. Click the Visit ID of the upcoming visit they wish to cancel.
3. Go to the **Actions** tab, and click the **Cancel** button. The writer will be switched to green priority.
4. Go back to the **Create an Appleby Visit** page, select the writer from the list, and proceed from there.

If the writer does not want to cancel the upcoming visit, explain that in that case you cannot work with them, even if nobody is waiting for a walk-in consultation. Click “**turn-away**” to the right of their name. (If a student has further questions about this policy, please bring them to Jasmine or a TAC; if Jasmine or a TAC are not available, give them Jasmine’s card, or encourage them to talk to Katie or Kirsten. Also, see Appendix A for helpful diagrams explaining their status.)

## ENTER DEPARTMENT AND COURSE INFORMATION

1. At the bottom of the **Create a walk-in visit** page (see image below), **select the course department** by scrolling through the list on the left, or by starting to type the department name into the department quick search textbox.

The screenshot shows the 'Create a walk-in visit' page. On the left, a sidebar titled 'department quick search ...' lists departments: AAAS, African & African American Std; AAS, Asian American Studies; ABUS, Applied Business; ACCT, Accounting; ACL, Arts and Cultural Leadership. To the right, there are fields for 'Course number:' and 'Course name:', both currently empty. Below these are 'Search' and 'Clear filters' buttons. Further right is a panel with 'Not for credit' and 'Unspecified' buttons. At the bottom, a green box contains two radio buttons: 'create a jump-in schedule' (unchecked) and 'select an existing walk-in schedule ([change](#))'. The checked option is 'select an existing walk-in schedule'. To the right of this box are 'Login: [Login now](#) (manual)' and 'Logout'. On the far right, a box displays 'Status: **Not created yet**'.

The upper rectangle contains tools to find course and department info, and the bottom rectangle contains the **Login now** button. When the consultant clicks that button, the visit status (bottom right) will change from **Not created yet**. After you have filtered by department, a menu of classes within the department will appear below the department list. If the paper is not being written for a course, select the **Not for credit** button on the right.

## WHAT IF THE VISIT IS FOR A DISSERTATION OR THESIS?

Dissertation and thesis credits DO count as courses; you will find the course number towards the very bottom of the menu of classes in the appropriate department. (Usually, it's 8888 for a PhD dissertation or 8777 for an MA thesis.).

2. **Select the course for which the person is writing** by scrolling through the menu of classes or by typing the course number into the **Course number** textbox.

- If the person is writing for a course but doesn't know the department or course information, select **Unspecified** for now; then, see if the writer can find the information in their OneStop account at some point during the session. You can edit the course information later (see page 24 for instructions).
- Again, Dissertation and thesis credits do count as courses; you will find the course number towards the very bottom of the menu of classes in the appropriate department. (Usually, it's 8888 for a PhD dissertation or 8777 for an MA thesis.)

## CLICK THE "LOGIN NOW" BUTTON

- Click the **Login now** button, at which point the visit **Status** will automatically change to **Being-seen**, and the **Logout now** button will appear, as shown below.



## READ PREVIOUS VISIT COMMENTS (IF ANY) WITH THE WRITER

Reading comments *with writers* before an Appleby visit has two purposes:

- Transparency and continuity for students:** Our visit comments serve not only as an administrative record of a consultation, but also as an ongoing narrative about a writer's relationship with SWS and the writer's personal growth. We want writers to know that we are writing visit comments in their interest, so that writers have a sense of continuity as they take their work from consultant to consultant.
- Validating the work of fellow consultants:** By reading comments from a previous visit, you can validate the work of consultants that have previously worked with the student. By reading comments with writers, we can explicitly acknowledge the value of input from other consultants and how we all contribute to a writer's development in different ways.

## ACCESS THE MOST RECENT COMMENT

On the bottom left of your screen (see image below), you will see a record of the student's visit history. Look under the "Status" column and click the Visit ID of the first visit that has a "Completed" status. Click the Comment tab on the Visit detail page.

The screenshot shows a table of visit history. The columns include Time, Client, Requested consultant, Priority, and Mode. A red box highlights the 'Completed' status in the 'Mode' column for the first row. Another red box highlights the 'Completed' status in the 'Status' column for the same row. The visit ID '166707' is circled in red. At the bottom, a red box highlights the text '2) Select the visit ID of the most recent "Completed" visit.'

Time	Client	Requested consultant	Priority	Mode
14:47:58 PM	Claire Sherman		green	select
15:04:55 PM	Nitali Arora		green	select
15:06:17 PM	Kalley Thompson		green	select
15:14:32 PM	Summer Song		green	select
15:19:15 PM	Bailey Atkinson		green	select

**2) Select the visit ID of the most recent "Completed" visit.**

ID	Date	Time	Consultant	Status	Mode
166533	Thu, 11/09/2017	12:45	Celine Bogner	Cancelled	cancel
<b>166707</b>	Thu, 10/26/2017	11:15	Sourojit (G) Ghosh	Completed	select
166547	Wed, 10/25/2017	11:15	Jennifer D	Cancelled	cancel
164019	Tue, 10/03/2017	11:15	Celine Bogner	Completed	select
164018	Thu, 09/28/2017	15:00	Elizabeth Korzenowski	Completed	select
163165	Tue, 09/19/2017	14:15	Henry Rohlf	Completed	select

**1) Select a student and log them in**

Add Visitor | Remove Visitor | Edit Status

ID + email: 5350012 | sherm457@umn.edu  
Name: Claire Sherman  
Pref. Name:  
Pronunciation:  
Career: UGRD  
Major: Undeclared  
College: CLA

Read the comment aloud to the writer or read the comment silently and summarize it for the writer (“It looks like you were last here in September and met with Marah about a personal statement”). Know that you don’t need to dwell on the comment or its contents; of course, if it feels right, you can use the comment as a starting point to talk about the writer’s thoughts since the last consultation.

Possible conversation-starters:

*“Ok, it looks like you focused on grammar and clarity in your last session with Johanna. Are you interested in focusing on similar things today or do you want a new approach?”*

*“It looks like you were planning to re-write topic sentences in your introduction. How did that go for you?”*

*“Oh, look – your last session was from two years ago. Welcome back!”*

*“Still working on the lab report? No? Ok! What’s next for you?”*

Taking time to read comments means that your session may run a little longer than the normal 40 minutes. That is fine.

### At the end of the session, log out the writer and write comments immediately.

Unlike in Nicholson, where appointments are scheduled back-to-back with commenting time built in to the last 15 minutes of a shift, in Appleby, it is essential that you enter comments for your sessions as soon as you log the writer out—even if that means that another writer will have to wait while you write them. **Do not start another consultation until you have written comments for the previous one.**

We require that you write Appleby comments immediately for two reasons:

1. **Self-care:** Taking a few minutes to write the comments forces you to take a short break from consulting, which is especially important when it’s busy. After writing comments, it’s also easier to take a short bathroom or leg-stretching break if needed before meeting with the next writer.  
A small cartoon character with a thought bubble containing the text "but why?".
2. **Support for your SWS community of colleagues:** Writing comments immediately demonstrates to any waiting writers that it's what all consultants do after every session. If you don't write comments after consultations but just start right away with the next writer, it can create the perception that the other consultants are not as attentive to waiting writers as you appear to be. In other words, writing comments immediately is not only caring for yourself, but it also is an act of caring for your colleagues.

Note: it is important to log the writer out *before* you write comments—this accurately records the length of the consultation and makes us consistent with practices in Nicholson.

## MAKE A VISIT COMMENT

- At the end of the consultation, navigate to the Consultant Home.

Click the **Logout now** button, at which point you will be directed back to **Consultant Home**. There, you will see the visit you've just completed in your list of **Uncommented Visits** (see the image below). Here, the just-completed visit with Justin Morneau is now listed in the pink **Uncommented** section of **Consultant Home**. The consultant will click the Visit ID to write a comment before moving to the next waiting writer.

The screenshot shows the 'Consultant Home' interface. On the left, there's a vertical sidebar with tabs: 'Visits' (highlighted in green), 'Schedules', and 'Uncommented'. The 'Uncommented' section is highlighted in pink and contains a table with one row for a visit. The visit details are: ID 98375, Date 9/13/2013, Time 10:30, Client Justin Morneau, Course KIN 3131W: Hist/Phil of Sport, Mode Appleby, Status Completed, and Logout time 10:31. Above this table, a message says 'Number of schedules: 1'.

VI	98375	10:30	Justin Morneau	KIN 3131W: Hist/Phil of Sport		Appleby	Completed	10:30	10:31	11:10																				
Number of schedules: 1																														
Schedules																														
Uncommented																														
<table border="1"> <thead> <tr> <th>ID</th><th>Date</th><th>Time</th><th>Client</th><th>Course</th><th>Mode</th><th>Location</th><th>Chkin</th><th>Login</th><th>Logout</th></tr> </thead> <tbody> <tr> <td>98375</td><td>9/13/2013</td><td>10:30</td><td>Justin Morneau</td><td>KIN 3131W: Hist/Phil of Sport</td><td></td><td>Appleby</td><td>10:30</td><td>10:31</td><td>11:10</td></tr> </tbody> </table>											ID	Date	Time	Client	Course	Mode	Location	Chkin	Login	Logout	98375	9/13/2013	10:30	Justin Morneau	KIN 3131W: Hist/Phil of Sport		Appleby	10:30	10:31	11:10
ID	Date	Time	Client	Course	Mode	Location	Chkin	Login	Logout																					
98375	9/13/2013	10:30	Justin Morneau	KIN 3131W: Hist/Phil of Sport		Appleby	10:30	10:31	11:10																					

- From the **Consultant Home** page, click the **Visit ID** of the session you have just completed. The page will open on the **Comment** tab of that session's **Visit Detail** page (see below).

The screenshot shows the 'Visit Detail' page for Justin Morneau. The top navigation bar has tabs: 'Visit' (selected), 'Comment' (highlighted in blue), and 'Actions'. The date is Friday, September 13th 2013 - Fall 2013. The 'Comment' tab is active. On the left, there's a vertical sidebar with a 'Comment' tab. The main content area shows visit details for Justin Morneau, including ID 98375, Date 9/13/2013, Time 10:30, Consultant Katie Levin, Status Completed, and Mode Appleby. To the right, there's a 'Student Profile' section with fields: ID + email (3333333 | jmorneau@umn.edu), Name (Justin Morneau), Pref. Name, Pronunciation, Career (UGRD(MAJ)), Major (Geography B A), and College (CLA). Below this, a message says 'There is no comment for this visit.' with a 'Add comment' button.

Visit Detail						Friday, September 13th 2013 - Fall 2013													
Visit		Comment		Actions															
<b>Justin Morneau</b>																			
<input checked="" type="radio"/> Current semester: 2 <input type="radio"/> All semesters: 2																			
ID	Date	Time	Consultant	Status	Mode	ID + email	3333333   jmorneau@umn.edu	Name	<b>Justin Morneau</b>										
98369	Fri, 09/13/2013	14:15	Anil Chandiramani	Cancelled		Pref. Name		Pronunciation											
98375	Fri, 09/13/2013	10:30	Katie Levin	Completed		Career	UGRD(MAJ)	Major	Geography B A										
						College	CLA												
<div style="text-align: center;">         There is no comment for this visit.  <a href="#">Add comment</a> </div>																			

- Double-check the **Student Profile** to see whether the writer may have provided gender pronouns (you can tell that's a possibility if there is an asterisk next to their listed name from Data Warehouse). If the writer has provided gender pronouns, use the pronouns they have provided. If they have not provided gender pronouns, use the writer's name or initial when you write about them in the third person. Do not assume you know a writer's gender identity based on how you perceive them.
- Click the “Add comment” button. Two text boxes will appear. Click in the box under **What went on in the session?** and type in your response. Then, click in the box under **What’s next for this writer?** and type in your response.
- Click the **Update button** to save the comments.

## MANAGING THE SIGN-IN LIST: TURNING AWAY A WRITER

If the person at the top of the sign-in list is no longer in 9 Appleby (or waiting in the hallway) when you call their name, turn them away by clicking “turn-away” to the right of their name. You will receive a pop-up asking you to verify this action (see image below).



It is possible to put a writer back on the sign-in list, but we do this only rarely—mainly if we have made a mistake in turning the writer away. To do so, click the Turned-Away tab, and then click **restore** (see image below):

## KEEPING AWARE OF OTHER CONSULTANTS' SCHEDULES

One way that Appleby consultants are also like Attendants is that they need to be aware of which consultants are arriving and leaving. This awareness helps with ensuring that everyone has space to get their shift started on time—for example, which consulting table will be open next? It also helps with giving writers accurate information about who they are likely to work with, and when. If you wish, you can say something like,

*“My shift is ending in ten minutes, but I see that [consultant name] and [consultant name] are about to start right after I leave. You’re at the top of the list, so you’ll be able to work with one of them.”*

You can find this information by going to the **Schedules** menu and selecting **View Appleby Schedules**.

# USING THE DATABASE IN NICHOLSON

When you consult in Nicholson, you have the benefit of a front desk attendant who helps manage the schedule and create visits for writers. In Nicholson, consultations occur by appointment, so you can (and should) read about the writers you are scheduled to work with on a given day during the fifteen minutes before your first scheduled consulting slot. Nonetheless, you will also review comments alongside writers when a Nicholson session begins. The following procedure will work both on your own and with a writer.

## VIEWING COMMENTS FROM PREVIOUS VISITS

1. In the SWS database, click Staff > Consultant Home.
2. In the Visits section (the top part of your consultant home page), click the Visit ID for the writer whose comments you want to read. Visit IDs are the hyperlinked numbers just to the left of each writer's name. You will see the Visit Detail page for that writer (see image below).

Visit Detail						Friday, September 13th 2013 - Fall 2013									
Visit	Comment	Actions				Add/Remove/Edit									
<b>Joseph Mauer</b>															
<input checked="" type="radio"/> Current semester: 2 <input type="radio"/> All semesters: 2															
ID	Date	Time	Consultant	Status	Mode	ID + email	7000000   jmauer@umn.edu								
98368	Fri, 09/13/2013	10:30	Jasmine Tang	Pending		Name	<b>*Joseph Mauer</b>								
98360	Thu, 09/12/2013	9:45	Alysha Bohanon	Completed		Pref. Name	<b>Joe</b>								
Pronunciation															
Career															
Major															
College															
Add															
Sch ID	Date	Time	Consultant	Length	Purpose	Requested									
101324	Fri, 09/13/2013	10:30	Jasmine Tang	45	By-appt	yes	edit	remove							
Course: WRIT 1301: University Writing						Status:	Pending								
Location: 15 Nicholson Hall						Checkin:									
Mode: F2F regular						Login:									
Created on: 08/08/2013 14:59:53						Logout:									
Reserve type: Regular						Flags:									

3. If the writer has Completed visits during the current semester (as there are above), click the Visit ID for the most recent one, which will take you to the associated Visit Detail page. There, click the Comment tab to view the comment (see image below).

**Visit Detail**

Friday, September 13th 2013 - Fall 2013

Visit	Comment	Actions			
<b>Joseph Mauer</b>					
<input checked="" type="radio"/> Current semester: 2		<input type="radio"/> All semesters: 2			
ID	Date	Time	Consultant		
98368	Fri, 09/13/2013	10:30	Jasmine Tang		
98360	Thu, 09/12/2013	9:45	Alysha Bohanon		
Status	Mode				
Pending	1-on-1				
<a href="#">Add/Remove/Edit</a>					
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50px; vertical-align: top;"> <b>ID + email</b>            Name            Pref. Name            Pronunciation         </td> <td style="width: 50px; vertical-align: top;">           7000000   jmauer@umn.edu  <b>*Joseph Mauer</b>  <b>Joe</b>            UGRD(MAJ)            Kinesiology B S            EHD         </td> </tr> </table>				<b>ID + email</b> Name Pref. Name Pronunciation	7000000   jmauer@umn.edu <b>*Joseph Mauer</b> <b>Joe</b> UGRD(MAJ) Kinesiology B S EHD
<b>ID + email</b> Name Pref. Name Pronunciation	7000000   jmauer@umn.edu <b>*Joseph Mauer</b> <b>Joe</b> UGRD(MAJ) Kinesiology B S EHD				
<b>Comment</b> <p>What went on in the session?</p> <p>Joe wanted to strategize about two things: how to use SWS throughout the semester, and how to approach his first paper for 1301, a summary due next Wednesday. We talked about what he already knew about SWS, and then about specific ways that he likes to write and get feedback. He decided he could come in as soon as he gets an assignment, then plan his process for the rest of the paper. We spent the rest of the time mapping out how he could read and annotate the text he was going to summarize so that writing the summary later would be easier.</p> <p>What's next for this writer?</p> <p>Joe plans to read and annotate the article, then come in to see Jasmine tomorrow.</p>					

If Joe had visits from (a) previous semester(s), we could see them by clicking the “All semesters” button, just above the Visit Status column. Note, too, the asterisk indicating that Joe has used the Student Profile to provide additional information that he wants the consultant to know. Before Joe’s visit, the consultant should also click Joe’s name to see that additional information.

4. If the writer has not completed visits during the current semester, or if you want to read more about visits from past semesters, then click the **All semesters** radio button. This will pull up the writer’s visits from previous semesters. Reading comments from the most recent of these visits may be useful to prepare for today’s session.

## NOTICING WHEN THE WRITER ARRIVES

If the Attendant has time, they will let you know that the next writer you’re scheduled to see has arrived. Because the front desk can get busy, though, you should also keep an eye on your Consultant Home page to see whether the next writer is waiting. When the line associated with their visit turns pink and their visit status changes to **Waiting**, that means they have checked in with the Attendant. When it’s time to start the visit, you should go to the front desk to greet the writer by name and introduce yourself, then lead the writer back to your consulting table.

## LOGGING IN THE WRITER

As soon as you both arrive at the table, click the Login button to begin the session (see image below).

**Brad S.**

**Consultant Home**

Tuesday, September 7th 2010 - Fall 2010

Number of visits: 4

Visits	ID	Time	Client	Course	Mode	Location	Status	Chkin	Login	Logout
	53875	12:00	Joe Mauer	NFC 0000: Not for credit	1-on-1	Nicholson	Waiting	12:00	<b>Login</b>	
	53877	12:45	Justin Morneau	GEOG 3101: US and Canada	1-on-1	Nicholson	Pending	Chkin		
	53878	14:30	Jason Kubel	WRIT 1301: University Writing	1-on-1	Appleby	Completed	14:30	14:30	14:30
	53876	12:45	David Ortiz	FSOS 4155: Parent-Child Rel	1-on-1	Nicholson	Cancelled			

Here, Joe Mauer has been checked in by the attendant, so Joe’s visit status reads **Waiting**, and the **Login** button is visible. Once Brad (the consultant) clicks the button to log Joe in, the visit status will change to **Being-seen**, the line will turn yellow, and a **Logout** button will appear in the far right-hand column.

## FINISHING UP A SESSION

1. On your Consultant Home page, click the **Logout** button for the writer whose visit is just finishing.
2. If you notice that the next writer's status reads **Waiting**, make a mental note of their name so that you can greet them when you usher the current writer back to the front desk.

## AFTER YOUR LAST NICHOLSON APPOINTMENT: WRITING COMMENTS

In the last 15 minutes that you are scheduled to be in Nicholson, you should write comments for any still-uncommented visits. Because consulting space is at a premium, it's a good idea to move to the computer near the window in room 10 (it has a purple "SWS commenting annex" sign on top) or to the lab in order to write your remaining comments. This practice will enable any newly-arriving colleagues to get their own sessions started on time.

The philosophy of comment-writing is in Appendix A of the Consultant Handbook; this section of the database is to take you through the technical steps of writing comments for appointment-based visits.

1. **Click Staff > Consultant Home.** In the **Uncommented** section of the page, you will see a list of all of the visits on which you still need to comment.
2. **Click the Visit ID for the session** for which you want to write comments. This will bring up the Comment tab of the Visit Detail page, showing the writer's visits for the current semester in reverse chronological order. By default, the page will open on today's completed visit.
3. When you open this page, **double-check the Student Profile to see whether the writer may have provided gender pronouns** (you can tell that's a possibility if there is an asterisk next to their listed name from Data Warehouse). If the writer has provided gender pronouns, use the pronouns they have provided. If they have not provided gender pronouns, use the writer's name or initial when you write about them in the third person. Do not assume you know a writer's gender identity based on how you perceive them.
4. **Click the "Add comment" button.** Two text boxes will appear.
  - a. Click in the box under **What went on in the session?** and type in your response.
  - b. Click in the box under **What's next for this writer?** and type in your response.
5. **Click the Update button** to save the comments.
6. If you completed more than one appointment during your shift, return to **Staff > Consultant Home**. Click the Visit ID of the next uncommented visit and repeat the commenting process.
7. **Log out** of the database.

## CREATING A NICHOLSON APPOINTMENT

Writers typically use mySWS or talk with a front desk Attendant to make an appointment in Nicholson; however, because everyone who consults in all locations of SWS is in a position to make Nicholson appointments for writers who want them, we all need to know how to create Nicholson visits.

If you are beginning from the home page, click or hold the mouse pointer over the **Visits** button on the menu bar at the top of the screen, and select the **Create a Nicholson Visit** option from the drop-down menu. The **Create a Nicholson visit** page will appear (see images on page 22).

### 1. Search for the writer's student record.

To find the writer in our database, enter any of the following pieces of information in the appropriate text box at the top of the **Create a Nicholson Visit** page:

- the writer's seven-digit U of M student ID number
- the writer's seven-digit U of M student ID number (X500)
- the writer's first and/or last name

### 2. Click the **Find** button.

A list of matches to the criteria you've entered will appear.

- The writer will be automatically selected for the visit if you search by X500s and student IDs because these are unique identifiers.
- Click the writer's name to select the writer from a list if you search for first/last names, as doing so will return a list of all the people with that name currently attending the university.

## WHAT IF I CAN'T FIND THE WRITER IN THE DATABASE?

If someone does not appear in the database, that means that they are not currently registered for credits, and therefore are not eligible to use Student Writing Support. Because 90% of SWS's operating budget is paid for out of student fees, and because we turn away so many students already, we reserve all our consulting time for current members of the U of M community.

If a writer is surprised at not being recognized by our database, you should suggest that they check their registration status in OneStop. Explain that our database is hooked into university registration data, and that although the database is updated nightly, it may not have the most recent information. If the person's OneStop account shows a current registration, tell them that our database should be updated with the latest information tonight, so they should be able to make an appointment within 24 hours.

Katie L.

Create a Nicholson visit

**Waiting** **Turned-away**

Tuesday, September 3rd 2019 - Fall 2019

No entry found

Add To Wait List      Add Visitor | Remove Visitor

**1** Student ID/Name/X500:  **2** Find

**Nicholson: 256**

Date	Time	Consultant
Tue, 09/03/2019	9:00 AM	Alanna
Tue, 09/03/2019	9:00 AM	Ariana
Tue, 09/03/2019	9:00 AM	Caty T.
Tue, 09/03/2019	9:00 AM	Sen
Tue, 09/03/2019	9:45 AM	Alanna
Tue, 09/03/2019	9:45 AM	Ariana
Tue, 09/03/2019	9:45 AM	Caty T.
Tue, 09/03/2019	9:45 AM	Sen
Tue, 09/03/2019	10:30 AM	Ariana
Tue, 09/03/2019	10:30 AM	Caty T.
Tue, 09/03/2019	10:30 AM	Celine
Tue, 09/03/2019	10:30 AM	Sourojiti (G)
Tue, 09/03/2019	11:15 AM	Ariana
Tue, 09/03/2019	11:15 AM	Caty T.
Tue, 09/03/2019	11:15 AM	Celine

**Filter schedules by:**  
 Mon     Tue     Wed     Thu     Fri  
 Time from  to   
 Consultant  quick search ...    
[View consultants' biographies \(pop-up\)](#)

Request consultant

3. **Scroll through the list of appointments** to find a slot that fits the client's availability and preferences (see below).
4. **Use the filters** on the right-hand side of the screen to limit appointment slots by day, time, or consultant, if you would like to narrow the choices.
5. **Click the schedule slot to select and reserve it.** You'll know you've done it when you see the visit info in boldface under the list of slots.
  - a. Check the **Request consultant** box if the writer requests to see a particular consultant, or if they selected a particular consultant from the available options you gave them.

Create a Nicholson visit

**Waiting** **Turned-away**

Tuesday, September 3rd 2019 - Fall 2019

No entry found

Add To Wait List      Add Visitor | Remove Visitor

Lionel Messi

ID + email	2461987   GOAT@umn.edu
Name	<b>Lionel Messi</b>
Pref. Name	<b>Lionel</b>
Pronunciation	
Career	GRAD
Major	PhilosophyB A
College	CLA

**Nicholson: 256**

Date	Time	Consultant
Tue, 09/03/2019	9:00 AM	Alanna
Tue, 09/03/2019	9:00 AM	Ariana
Tue, 09/03/2019	9:00 AM	Caty T.
Tue, 09/03/2019	9:00 AM	Sen
Tue, 09/03/2019	9:45 AM	Alanna
Tue, 09/03/2019	9:45 AM	Ariana
Tue, 09/03/2019	9:45 AM	Caty T.
Tue, 09/03/2019	9:45 AM	Sen
Tue, 09/03/2019	10:30 AM	Ariana
Tue, 09/03/2019	10:30 AM	Caty T.
Tue, 09/03/2019	10:30 AM	Celine
Tue, 09/03/2019	10:30 AM	<b>Sourojiti (G)</b>
Tue, 09/03/2019	11:15 AM	Ariana
Tue, 09/03/2019	11:15 AM	Caty T.
Tue, 09/03/2019	11:15 AM	Celine

**Filter schedules by:**  
 Mon     Tue     Wed     Thu     Fri  
 Time from  to   
 Consultant  quick search ...    
[View consultants' biographies \(pop-up\)](#)

**3** **4** **5a.**  Request consultant

6. **Select the course department.** Type the department name into the department quick search textbox or scroll through the list at the bottom of the **Create a Nicholson visit** page (see below). Dissertation and thesis credits count as courses; you will find the course number towards the very bottom of the menu of classes in the appropriate department.

- a. If the person is not writing for a course, select the **Not for credit** button on the right.

After you have filtered by department, a menu of classes within the department will appear below the department list.

7. **Select the course number.** Scroll through the menu of classes or type the course number into the **Course number** textbox.

- a. If the writer does not know the course information at the time of making the appointment, select **Unspecified** for now.

Sourojit (G) at 10:30 AM on Tue, 09/03/2019

Request consultant

department quick search ... 6

Course number: 7

Course name:

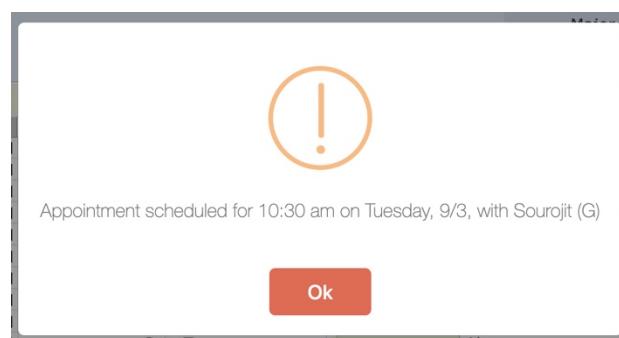
Search Clear filters

6  
7  
6a  
7a

Not for credit  
Unspecified

8 Create visit

8. **Click the **Create Visit** button** at the bottom of the screen to enter the visit into the database and wait for the pop-up message that confirms that the visit was created successfully. Repeat the details to the writer who is reserving the appointment and remind them that they can view (and change or cancel) the appointment by logging into mySWS ([writing.umn.edu/mySWS](http://writing.umn.edu/mySWS)).



# MANAGING SWS VISITS: BEYOND THE BASICS

One of the forgiving features of the database is that most details of a visit can be changed after the fact—for example, if you need to change a login time because you only remembered to log the person in at the end of the visit, or you need to change the course from “Not for Credit,” that’s totally possible. You can view your future schedules, check out past and future visits, and even create group visits. This section contains instructions on how to do all of those things.

## CHANGE COURSE INFORMATION

1. **Go to the Visit Detail page.** Beginning from the **Today's Visits** page, select the visit ID (farthest left column) for the appropriate appointment. See page 6 for more information on navigating to the page.
2. **Click the Course field** at the top of the pink box at the bottom of the page (see image below). Mousing over turns the field yellow; clicking will allow you to edit.
3. **Select the course department.** Type the department name into the department quick search textbox or scroll through the list at the bottom of the **Create a Nicholson visit** page (see image below). Dissertation and thesis credits count as courses; you will find the course number towards the very bottom of the menu of classes in the appropriate department.
  - a. If the person is not writing for a course, select the **Not for credit** button on the right.

After you have filtered by department, a menu of classes within the department will appear below the department list.

4. **Select the course number.** Scroll through the menu of classes or type the course number into the **Course number** textbox.
5. **Click Update.**

The screenshot shows the SWS Visit Detail page for Seimone Augustus. At the top, there are tabs for Visit, Comment, and Actions. Below the tabs, the visitor's name is displayed. On the right, there are buttons for Add Visitor, Remove Visitor, and Edit Status. The main area shows a table of completed visits for the current semester. A pink box highlights the 'Actions' section at the bottom. Inside this box, there is a 'department quick search ...' input field (labeled 3), a 'Course number:' input field containing '4' (labeled 4), and a 'Course name:' dropdown menu. To the right of these fields are buttons for 'Not for credit' and 'Unspecified'. At the bottom of the pink box, there is a table with visit details: Course: DES 8888: Thesis Credit:Doct\*, Location: 15 Nicholson Hall, Mode: Face-to-face, Created on: 08/12/2016 10:35:06, Reserve type: Regular, Status: Being-seen, Checkin: 14:13:00, Login: 14:40:03, Logout: (empty), and Flags: (empty). A large green 'Update' button is at the bottom of the pink box (labeled 5).

## CHANGE LOGIN AND LOGOUT TIMES

1. **Go to the Visit Detail page.** Beginning from the **Today's Visits** page, select the visit ID (farthest left column) for the appropriate appointment. See page 6 for more information on navigating to the page.
2. **Click the Login field** on the right side of the pink box at the bottom of the page (see image below). Mousing over turns the field yellow; clicking will allow you to edit.
3. **Enter the correct time.** Record all times in military time. Add 12 hours to any time from 1:00 p.m. on. For example, 2:15 p.m. is actually 14:15 p.m.
4. Click **Update** after making changes.

**Visit Detail**      Tuesday, September 3rd 2019 - Fall 2019

Visit	Comment	Actions																										
<b>Lionel Messi</b>																												
🕒 Current semester: 0 completed, 0 upcoming		🕒 Lifetime: 0 completed																										
ID	Date	Time	Consultant																									
173878	Tue, 09/03/2019	14:15	Pierre Abillama																									
Status	Mode																											
Being-seen																												
<a href="#">Add Visitor</a>   <a href="#">Remove Visitor</a>																												
<table border="1"><tr><td>ID + email</td><td>2461987   GOAT@umn.edu</td></tr><tr><td>Name</td><td><b>Lionel Messi</b></td></tr><tr><td>Pref. Name</td><td><b>Lionel</b></td></tr><tr><td>Pronunciation</td><td></td></tr><tr><td>Career</td><td>GRAD</td></tr><tr><td>Major</td><td>PhilosophyB A</td></tr><tr><td>College</td><td>CLA</td></tr></table>				ID + email	2461987   GOAT@umn.edu	Name	<b>Lionel Messi</b>	Pref. Name	<b>Lionel</b>	Pronunciation		Career	GRAD	Major	PhilosophyB A	College	CLA											
ID + email	2461987   GOAT@umn.edu																											
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Major	PhilosophyB A																											
College	CLA																											
<a href="#">Add</a>																												
Sch ID	Date	Time	Consultant	Length	Purpose	Requested																						
194739	Tue, 09/03/2019	10:30	Sourojit (G) Ghosh	45	By-appt																							
195730	Tue, 09/03/2019	12:45	Pierre Abillama	45	By-appt																							
195885	Tue, 09/03/2019	14:15	Pierre Abillama	45	By-appt	<a href="#">yes</a>	<a href="#">edit</a>	<a href="#">remove</a>																				
<table border="1"><tr><td>Course:</td><td>PHIL 3201: Free Will and Responsibility</td><td>Status:</td><td>Being-seen</td></tr><tr><td>Location:</td><td>15 Nicholson Hall</td><td>Checkin:</td><td>14:13:00</td></tr><tr><td>Mode:</td><td>Face-to-face</td><td>Login:</td><td>14:40:02</td></tr><tr><td>Created on:</td><td>07/23/2019 14:55:07</td><td>Logout:</td><td></td></tr><tr><td>Reserve type:</td><td>Regular</td><td>Flags:</td><td><b>2, 3</b></td></tr></table>						Course:	PHIL 3201: Free Will and Responsibility	Status:	Being-seen	Location:	15 Nicholson Hall	Checkin:	14:13:00	Mode:	Face-to-face	Login:	14:40:02	Created on:	07/23/2019 14:55:07	Logout:		Reserve type:	Regular	Flags:	<b>2, 3</b>			
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Mode:	Face-to-face	Login:	14:40:02																									
Created on:	07/23/2019 14:55:07	Logout:																										
Reserve type:	Regular	Flags:	<b>2, 3</b>																									

## RESCHEDULE AN APPOINTMENT TO A DIFFERENT TIME

Do not cancel an appointment when the writer asks to reschedule. Instead, reschedule the visit through the visit details page.

1. **Go to the Visit Detail page.** Beginning from the **Today's Visits** page, select the visit ID (farthest left column) for the appropriate appointment. See page 6 for more information on navigating to the page.
2. **Select the Actions tab** on the Visit Detail page. This tab enables you to make big changes to visits, like changing their status or rescheduling them altogether.
3. **Select Reschedule** to pull up the pop-up Rescheduling face-to-face visit window.

**Visit Detail**

Visit	Comment	Actions														
3	<input type="button" value="Reschedule"/> <input type="button" value="Revive"/> as <input type="button" value="Waiting"/> <input type="button" value="Swap"/> with <input type="button" value=" "/> <input type="button" value="Log out"/> <input type="button" value="Cancel"/> <input type="button" value="No-show"/> <input type="button" value="Mark dirty-data"/>	Tuesday, September 3rd 2019 - Fall 2019 <table border="1"> <tr><td>Client(s):</td><td>Joseph Mauer</td></tr> <tr><td>Consultant:</td><td>Sen Xiong</td></tr> <tr><td>Date:</td><td>Thu, 09/05/2019</td></tr> <tr><td>Time:</td><td>9:00</td></tr> <tr><td>Status:</td><td>Upcoming</td></tr> <tr><td>Location:</td><td>15 Nicholson Hall</td></tr> <tr><td>Mode:</td><td>Face-to-face</td></tr> </table>	Client(s):	Joseph Mauer	Consultant:	Sen Xiong	Date:	Thu, 09/05/2019	Time:	9:00	Status:	Upcoming	Location:	15 Nicholson Hall	Mode:	Face-to-face
Client(s):	Joseph Mauer															
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Date:	Thu, 09/05/2019															
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Location:	15 Nicholson Hall															
Mode:	Face-to-face															

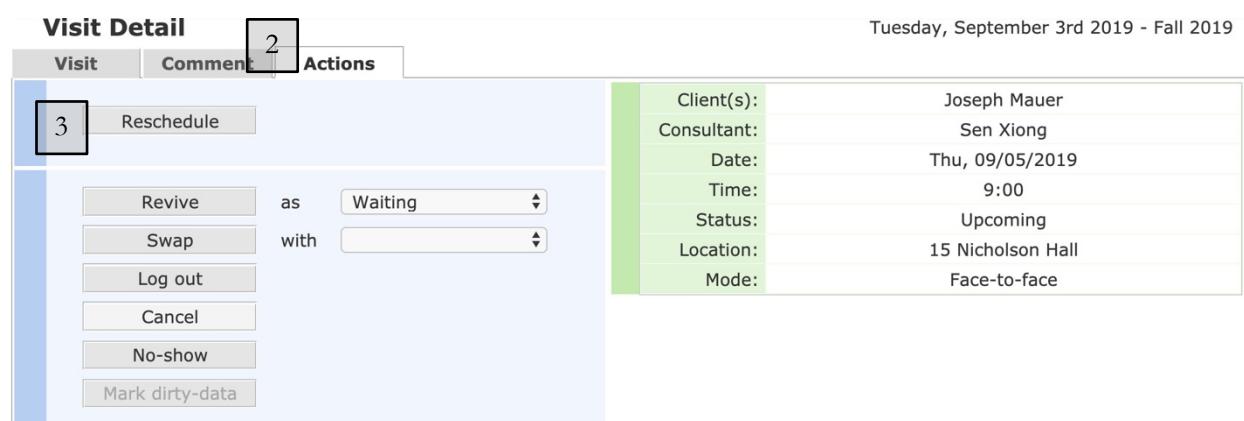
4. Select filters to generate a list of appropriate appointment slots. Ask the client what times will work for their rescheduled appointment and whether they would like to work with the same consultant. Depending on the client's preferences, select "same consultant" to generate a list of appointments with the same consultant, or use the additional filters to generate a list based on time. See image below.
5. Click an appropriate appointment slot to select it from the list at the left of the screen.
6. Select Leave old schedule available. If the client has requested the same consultant, also select Request consultant.
7. Click Reschedule.

**Visit Detail**

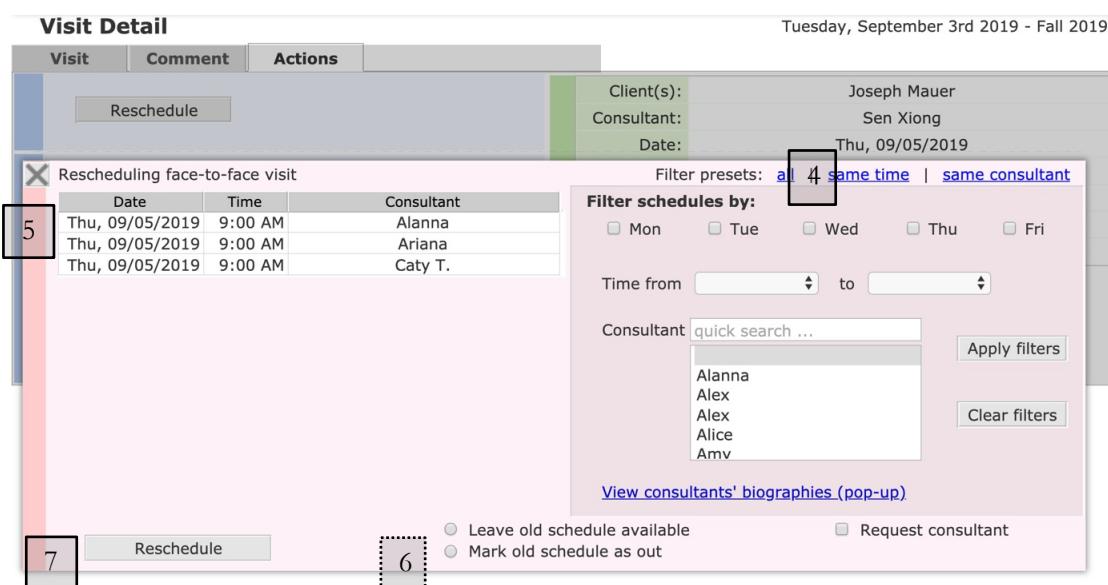
Visit	Comment	Actions																																										
5	<input type="button" value="Reschedule"/> <div style="border: 1px solid #ccc; padding: 5px; width: 300px;"> <b>Rescheduling face-to-face visit</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th>Date</th><th>Time</th><th>Consultant</th></tr> </thead> <tbody> <tr><td>Thu, 09/05/2019</td><td>9:45 AM</td><td>Sen</td></tr> <tr><td>Tue, 09/10/2019</td><td>9:00 AM</td><td>Sen</td></tr> <tr><td>Tue, 09/10/2019</td><td>9:45 AM</td><td>Sen</td></tr> <tr><td>Thu, 09/12/2019</td><td>9:00 AM</td><td>Sen</td></tr> <tr><td>Thu, 09/12/2019</td><td>9:45 AM</td><td>Sen</td></tr> <tr><td>Tue, 09/17/2019</td><td>9:00 AM</td><td>Sen</td></tr> <tr><td>Tue, 09/17/2019</td><td>9:45 AM</td><td>Sen</td></tr> <tr><td>Thu, 09/19/2019</td><td>9:00 AM</td><td>Sen</td></tr> <tr><td>Thu, 09/19/2019</td><td>9:45 AM</td><td>Sen</td></tr> <tr><td>Tue, 09/24/2019</td><td>9:00 AM</td><td>Sen</td></tr> <tr><td>Tue, 09/24/2019</td><td>9:45 AM</td><td>Sen</td></tr> </tbody> </table> </div>	Date	Time	Consultant	Thu, 09/05/2019	9:45 AM	Sen	Tue, 09/10/2019	9:00 AM	Sen	Tue, 09/10/2019	9:45 AM	Sen	Thu, 09/12/2019	9:00 AM	Sen	Thu, 09/12/2019	9:45 AM	Sen	Tue, 09/17/2019	9:00 AM	Sen	Tue, 09/17/2019	9:45 AM	Sen	Thu, 09/19/2019	9:00 AM	Sen	Thu, 09/19/2019	9:45 AM	Sen	Tue, 09/24/2019	9:00 AM	Sen	Tue, 09/24/2019	9:45 AM	Sen	Tuesday, September 3rd 2019 - Fall 2019 <table border="1"> <tr><td>Client(s):</td><td>Joseph Mauer</td></tr> <tr><td>Consultant:</td><td>Sen Xiong</td></tr> <tr><td>Date:</td><td>Thu, 09/05/2019</td></tr> </table> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;">         Filter presets: <a href="#">all</a>   <a href="#">same time</a>   <a href="#">same consultant</a>   <b>Filter schedules by:</b> <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri                   Time from <input type="button" value="next week"/> to <input type="button" value=" "/>           Consultant <input type="text" value="quick search ..."/> <input type="button" value="Apply filters"/> <input type="button" value="Clear filters"/>   <a href="#">View consultants' biographies (pop-up)</a> </div>	Client(s):	Joseph Mauer	Consultant:	Sen Xiong	Date:	Thu, 09/05/2019
Date	Time	Consultant																																										
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Client(s):	Joseph Mauer																																											
Consultant:	Sen Xiong																																											
Date:	Thu, 09/05/2019																																											
6	<input type="radio"/> Leave old schedule available	<input type="checkbox"/> Request consultant																																										
7	<input type="radio"/> Mark old schedule as out																																											

## RESCHEDULE AN APPOINTMENT TO A DIFFERENT CONSULTANT

1. **Go to the Visit Detail page.** Beginning from the Today's Visits page, select the visit ID (farthest left column) for the appropriate appointment. See page 6 for more information on navigating to the page.
2. **Select the Actions tab** on the Visit Detail page. This tab enables you to make big changes to visits, like changing their status or rescheduling them altogether.
3. **Select Reschedule** to pull up the pop-up Rescheduling face-to-face visit window.



4. **Select “Same time”** to generate a list of appointments at the same time. Be sure to let the client know that their consultant has changed when they come to check in. If you will not be attending before their appointment, make a note for the next attendant.
5. **Click an appropriate appointment slot** to select it from the list at the left of the screen.
6. **Select Mark old schedule as out** if the consultant will not be available. This prevents other clients from scheduling with a consultant who is not available.
7. **Click Reschedule.**



## CANCEL A VISIT

1. **Go to the Visit Detail page.** Beginning from the Today's Visits page, select the visit ID (farthest left column) for the appropriate appointment. See page 6 for more information on navigating to the page.
2. **Select the Actions tab** on the Visit Detail page. This tab enables you to make big changes to visits, like changing their status or rescheduling them altogether.

**Visit Detail**

Visit	Comment	Actions
2		
<b>Reschedule</b>		
Revive as Waiting		
Swap with		
Log out		
3 Cancel		
No-show		
Mark dirty-data		

Tuesday, September 3rd 2019 - Fall 2019

Client(s):	Joseph Mauer
Consultant:	Sen Xiong
Date:	Thu, 09/05/2019
Time:	9:00
Status:	Upcoming
Location:	15 Nicholson Hall
Mode:	Face-to-face

3. **Click Cancel** to cancel the appointment.

## WHAT TO DO IF YOU SIGN IN/OUT THE WRONG WRITER

If you accidentally sign in or out the wrong writer, revive the visit and edit the visit status.

1. **Go to the Visit Detail page.** Beginning from the Today's Visits page, select the visit ID (farthest left column) for the appropriate appointment. See page 6 for more information on navigating to the page.
2. **Select the Actions tab** on the Visit Detail page. This tab enables you to make big changes to visits, like changing their status or rescheduling them altogether.
3. **Select Revive.**
4. **Select the correct visit status from the dropdown menu.** If the appointment has not begun, click "Upcoming" and then check the writer in as usual when they arrive. If the appointment is currently happening, click "Being-seen."

**Visit Detail**

Visit	Comment	Actions
2		
<b>Reschedule</b>		
Revive as Upcoming		
Swap with		
Log out		
3 Cancel		
No-show		
Mark dirty-data		

Wednesday, September 18th 2019 - Fall 2019

Client(s):	Joseph Mauer
Consultant:	Zack Pierson
Date:	Wed, 09/18/2019
Time:	11:15
Status:	Waiting
Location:	15 Nicholson Hall
Mode:	Face-to-face

## SWAP CONSULTANTS

Sometimes, you will need to swap which consultants are working with which writers. For example, a writer may have booked a visit with a consultant who is also their classroom instructor, but there are no more open slots to reschedule the writer with a different consultant.

In the example below, we can see that Joe Mauer has requested to work with Lauren (note the asterisk next to Lauren's name). However, Lauren has let the attendant know that she is the instructor for the course Joseph is coming in to work on (HMED 3002W). Since Lauren can't work with any students taking her current class, we will need to move Joseph to another consultant. We can't just use the actions tab to reschedule Joseph to the same time because all four consultants who are on the schedule at 11:15 are booked up. So, we're going to make a swap, trading Joseph and another client to each other's consultants.

1. Click the visit ID of the writer who needs to be with a different consultant.

Today's Visits      Wednesday, September 18th 2019 - Fall 2019

Nicholson	Online	Appleby	APARC	All				
Visit counts								
Completed: 0, Cancelled: 0, No-show: 0, Upcoming: 4								
ID	Time	Client	Consultant	Course	Status	Chkin	Login	Logout
173884	11:15	Rik Blyeven ( <b>Bert</b> )	Elza Thayer*	STAT 8511: Time Series	Upcoming	Chkin		X (R)
173885	11:15	Richard Bremer ( <b>Dick</b> )	Jake Grossman	NFC 0000: Not for credit	Upcoming	Chkin		X (R)
173886	11:15	Joseph Mauer ( <b>Joe</b> )	Lauren Klaffke*	HMED 3002W: Health Care in History II	Upcoming	Chkin		X (R)
173887	11:15	Seimone Augustus ( <b>Seimone</b> )	Zack Pierson	NFC 0000: Not for credit	Upcoming	Chkin		X (R)

2. Click the Actions tab.

Visit Detail      Wednesday, September 18th 2019 - Fall 2019

Visit    Comment    Actions

3. Choose another consultant from the drop-down menu next to the Swap button.

Visit Detail      Wednesday, September 18th 2019 - Fall 2019

Visit    Comment    Actions

Reschedule	Client(s):	Joseph Mauer
Revive	Consultant:	Lauren Klaffke
Swap	Date:	Wed, 09/18/2019
Log out	Time:	11:15
Cancel	Status:	Upcoming
No-show	Location:	15 Nicholson Hall
Mark dirty-data	Mode:	Face-to-face

as      with      ✓ Elza Thayer\*  
Waiting      Jake Grossman  
Zack Pierson

When you are deciding which consultant to swap, it's important to notice requests. For example, in the situation above, Bert Blyeven requested to meet with Elza (we can tell because of the asterisk, which also shows up next to Elza's name in the drop-down menu), so we shouldn't choose to swap Joe in to work with Elza unless there's absolutely nobody else available. Fortunately, we can see from the lack of asterisks that neither Zack nor Jake was requested, so either person is a good choice to work with Joe.

4. Click Swap.

5. If it is indeed ok, click OK on the "are you sure?" pop-up.

The following image shows what the new set of 11:15 appointments looks like now that we have completed the swap.

Today's Visits									Wednesday, September 18th 2019 - Fall 2019																		
Nicholson	Online	Appleby	APARC	All																							
Visit counts																											
Completed: 0, Cancelled: 0, No-show: 0, Upcoming: 4																											
ID	Time	Client	Consultant	Course	Status	Chkin	Login	Logout																			
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173887	11:15	Seimone Augustus ( <b>Seimone</b> )	Lauren Klaffke	NFC 0000: Not for credit	Upcoming	Chkin			X	Q																	

When the original writer arrives, be sure to explain to them why you needed to schedule them with another consultant, especially if they requested their original consultant. If you won't be working at that time, please leave a sticky note on the Attending machine so that a colleague will know what's up.

## CREATE A GROUP VISIT

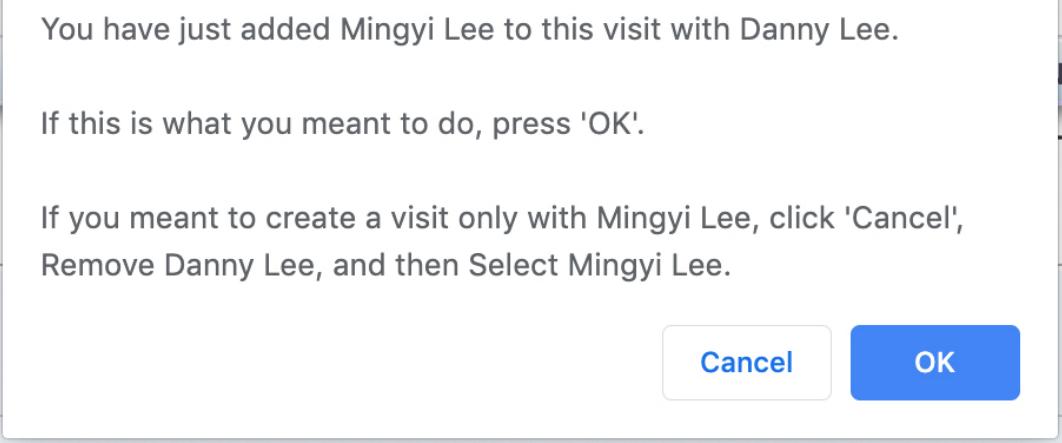
If writers are working on a group project, we can create an appointment for two or more people to work with one consultant at the same time.

First, create a visit for one of the writers. See page 21 for instructions on creating a Nicholson visit or page 11 for instructions on creating an Appleby visit.

1. Click the visit ID for the new appointment to go to the writer's Visit Detail page.
2. Click the **Add Visitor** link at the upper-right-hand part of the visit detail screen (see below).
3. Enter the second writer's name or x500 in the textboxes that appear and click **Find**.

Katie L.	Admin	Visits	Schedules	Staff	Logout
<b>Visit Detail</b>					
<a href="#">Visit</a> <a href="#">Comment</a> <a href="#">Actions</a>			Tuesday, September 3rd 2019 - Fall 2019		
<b>Danny Lee</b>			<span style="border: 1px solid black; padding: 2px;">2</span> <a href="#">Add Visitor   Remove Visitor</a>		
<span style="border: 1px solid black; padding: 2px;">3</span> Student ID/Name/X500: <input type="text" value="mingyi lee"/>			<input type="button" value="Find"/>		
<a href="#">Add</a>					
Sch ID	Date	Time	Consultant	Length	Purpose
195003	Wed, 09/04/2019	9:00	Lauren Klaffke	45	By-appt
Requested	no	edit	remove		
Course:	BICB 8510: Computation and Biology			Status:	Upcoming
Location:	15 Nicholson Hall			Checkin:	
Mode:	Face-to-face			Login:	
Created on:	07/23/2019 16:09:32			Logout:	
Reserve type:	Regular			Flags:	

4. Click OK in the pop-up window that appears next, if the visit is indeed ok.



5. Click "Update" to finalize the appointment. It will not be added to the system as a group visit until you do so. Note that both writer names appear for the appointment when you have successfully added the other writer(s).

Sch ID	Date	Time	Consultant	Length	Purpose	Requested	Status
195003	Wed, 09/04/2019	9:00	Lauren Klaffke	45	By-appt	no	Upcoming
Course:	BICB 8510: Computation and Biology				Status:	Upcoming	
Location:	15 Nicholson Hall				Checkin:		
Mode:	Face-to-face				Login:		
Created on:	07/23/2019 16:09:32				Logout:		
Reserve type:	Regular				Flags:		

## REMOVE A GROUP MEMBER

If one group member cancels or no-shows, remove the absent group member from the Visit Detail page. Do not remove or no-show the whole appointment if some group members are still present.

1. Click the visit ID for the group appointment to go to the Visit Detail page.

ID	Time	Client	Consultant	Course	Status	Chkin	Login	Logout
173880	9:00	Mingyi Lee (Mingyi), Danny Lee (Danny)	Lauren Klaffke	BICB 8510: Computation and Biology	Waiting	8:55	Login	Logout
173882	9:00	Vera Fisher (Vera)	Rachael Dumas*	NFC 0000: Not for credit	Being-seen	8:57	8:58	Logout
173881	9:00	Seimone Augustus (Seimone)	Kim Strain	DES 8888: Thesis Credit: Doctoral	Upcoming	Chkin		Logout
173883	9:00	Richard Bremer (Dick)	Pierre Abillama	VMED 8292: Journ Club: Lrg Anim Int Med	Upcoming	Chkin		Logout

2. Click the name of the client who has cancelled or no-showed.
3. Click the Remove Visitor hyperlink in the upper right-hand corner of the screen.
4. Follow the on-screen instructions and click the OK button to finish.

The screenshot shows the 'Visit Detail' page for 'Katie L.' on Tuesday, September 3rd 2019 - Fall 2019. The top navigation bar includes Admin, Visits, Schedules, Staff, and Logout. A 'Visit Detail' section shows 'Danny Lee, Mingyi Lee' with a count of 2 visits. Below this, a message says 'No visit found for all semesters'. To the right, a detailed profile for 'Mingyi Lee' is shown with fields: ID + email (2020202 | peppapig@umn.edu), Name (Mingyi Lee), Pref. Name (Mingyi), Pronunciation, Career (GRAD), Major (Theatre Arts Ph D), and College (CLA). An 'Add' button is at the bottom right. Below the profile, a table lists a single visit entry: Sch ID 195003, Date Wed, 09/04/2019, Time 9:00, Consultant Lauren Klaaffke, Length 45, Purpose By-appt, Requested no, and buttons for edit and remove. To the left of the visit table, there's a row of details: Course (BICB 8510: Computation and Biology), Location (15 Nicholson Hall), Mode (Face-to-face), Created on (07/23/2019 16:09:32), and Reserve type (Regular). To the right of the visit table, there are status fields: Status (Upcoming), Checkin:, Login:, Logout:, and Flags:. At the bottom is an 'Update' button.

## VIEW YOUR OWN SCHEDULE

If you want to check your future schedule for conflicts, you can use the Center Schedule page.

1. Click or hold the mouse pointer over the over the **Schedules** button at the top of the page and **select the Center Schedule option** from the drop-down menu. The **Center Schedule** page will appear. As shown below, **Center Schedule** always opens by default to the current date.

The screenshot shows the 'Center Schedule' page for 'Zack P.' on Monday, September 7th 2015. The top navigation bar includes C4W Home, Visits, Schedules, Staff, and Logout. The main area is titled 'Center Schedule' with filter fields: Date (09/07/2015), Start time:, Consultant:, Purpose:, Location:, Project:, Slot length:, and Week day:. Below these are buttons for 'Clear filters', 'Search', and 'switch to advanced querying'.

2. Add a hyphen at the end of today's date so that you can see scheduled time beyond today; then, type your name in the **Consultant** field, and click the **Search** button. This brings up a table showing only your schedule for the rest of the semester.

Zack P. | C4W Home | Visits | Schedules | Staff | Logout

### Center Schedule

Monday, September 7th 2015

Date:	09/07/2015-	Start time:	2	Location:	
Consultant:	zack	Purpose:		Project:	
		Slot length:		Week day:	

[Clear filters](#) [Search](#) [switch to advanced querying](#)

Number of records found: 686 (showing 1 to 100)

	ID	Date	Time	Length	Consultant	Purpose	Location	#Visit
<input type="checkbox"/>	<a href="#">132864</a>	Tue, 09/08/2015	10:00	180	Zack Pierson	Walk-in	Appleby	0
<input type="checkbox"/>	<a href="#">133570</a>	Wed, 09/09/2015	9:00	45	Zack Pierson	Reading	Online	1
<input type="checkbox"/>	<a href="#">133571</a>	Wed, 09/09/2015	9:45	45	Zack Pierson	By-appt	Nicholson	1
<input type="checkbox"/>	<a href="#">133569</a>	Wed, 09/09/2015	10:30	45	Zack Pierson	Chat	Online	1
<input type="checkbox"/>	<a href="#">133572</a>	Wed, 09/09/2015	11:15	45	Zack Pierson	By-appt	Nicholson	0
<input type="checkbox"/>	<a href="#">133630</a>	Thu, 09/10/2015	9:00	45	Zack Pierson	By-appt	Nicholson	0
<input type="checkbox"/>	<a href="#">133631</a>	Thu, 09/10/2015	9:45	45	Zack Pierson	By-appt	Nicholson	1
<input type="checkbox"/>	<a href="#">133629</a>	Thu, 09/10/2015	10:30	45	Zack Pierson	By-appt	Online	1
<input type="checkbox"/>	<a href="#">133632</a>	Thu, 09/10/2015	11:15	45	Zack Pierson	By-appt	Nicholson	0
<input type="checkbox"/>	<a href="#">133633</a>	Thu, 09/10/2015	13:00	180	Zack Pierson	Out	Appleby	0
<input type="checkbox"/>	<a href="#">134992</a>	Thu, 09/10/2015	18:00	45	Zack Pierson	Reading	Online	1
<input type="checkbox"/>	<a href="#">134994</a>	Thu, 09/10/2015	18:45	45	Zack Pierson	Reading	Online	1
<input type="checkbox"/>	<a href="#">134991</a>	Thu, 09/10/2015	19:30	45	Zack Pierson	Chat	Online	1
<input type="checkbox"/>	<a href="#">134993</a>	Thu, 09/10/2015	20:15	45	Zack Pierson	Chat	Online	1
<input type="checkbox"/>	<a href="#">133635</a>	Mon, 09/14/2015	9:00	45	Zack Pierson	Reading	Online	0

[<< previous page](#) page  of 7 [next page >>](#)

- A **green** row with **By-appt** or **Online** in the Purpose column means that you are scheduled to consult in Nicholson or SWS.online and do not yet have a writer signed up for that time.
- A **white** row with **By-appt** or **Online** in the Purpose column means that an appointment is already scheduled for that time—you can click the Visit ID to read the details for that visit and the comments from the writer's previous sessions.
- A **pink** row with **Walk-in** in the Purpose column means that you are scheduled to consult in Appleby.
- A **yellow** row with **Project** in the Purpose column means that you are scheduled to work on a project during that time—click the visit to see what the project is, and check in with Katie or Jasmine for further details.
- A **blue** row with **Attending** in the Purpose column means that you are scheduled to be attending at that time.
- A **gray** row with **Out** in the Purpose column means that you were removed from the schedule.

If you are checking your future SWS schedule and notice there is a discrepancy in the database (e.g., you are marked as scheduled to consult when you are planning to be Out at a conference), please let Katie or Jasmine know right away.

## VIEW CENTER VISITS

You can use the Center Visits page for a number of reasons, including seeing which writers are scheduled to work with you in the future, seeing how many visits you've completed, or seeing which writers have given consent for their SWS.online session to be used in research.

1. In the menu bar, select **Visits > Center Visits**. The Center visit page will appear. As shown below, The **Center visit** page always automatically fills in the first day of the current semester, and it always includes a hyphen after that date to search the whole semester.
2. Use the pulldown menus to filter your search so that it reveals the visits that interest you, then click the “search” button. The image below is an example of a search for upcoming visits with a particular consultant, Zack. The page is filtered by **Visit status** and **Consultant**.

Zack P.	C4W Home	Visits	Schedules	Staff	Logout				
<b>Center visit</b>									
Visit status: Upcoming Location: Mode: Consultant: Zack Comment: Visitor status: joined Requested: Year: Admission:	Student ID: X500: Name: Career: College: Major: Sport: Athlete: Honors:	Weekday: Date: 9/8/2015- Time: Meeting status: Joined Course dept: Course number: Consent: Language: International:							
<input type="button" value="Clear filters"/> <input type="button" value="Search"/> <a href="#">switch to advanced querying</a>									
Number of records found: 3 Client count: 3									
	ID	Date	Time	Login	Client	Consultant	Status	Mode	Location
<input type="checkbox"/>	<a href="#">147420</a>	Fri, 05/06/2016	9:45		David Ortiz	Zack Pierson	Upcoming		Nicholson
<input type="checkbox"/>	<a href="#">147421</a>	Fri, 05/06/2016	10:30		Justin Morneau	Zack Pierson	Upcoming		Nicholson
<input type="checkbox"/>	<a href="#">147422</a>	Fri, 05/06/2016	11:15		Joseph Mauer	Zack Pierson	Upcoming		Nicholson

## CREATE NEW SCHEDULES

This is a good feature to know about, but unless you are creating schedules as an Attendant who is managing a bat signal, please do not create new schedules without talking to Jasmine, Katie, or Kirsten.

1. **Go to the Create New Schedules** page. Click the **Schedules** button on the menu bar at the top of the screen and select the **Create New Schedules** option from the drop-down menu.
  2. **Select the name of the new consultant** from the drop-down menu in the Consultant field.
- Use military time for start times after 12:59 p.m. At Nicholson, this is typically 1:30, 2:15, 3:00, 3:45, and 4:30, so 1:30 = 13:30, 2:15 = 14:15, and so on.
3. **Enter the start time** for the new schedule.
  4. **Select the purpose for the schedule** from the dropdown menu in the “for” field. For Nicholson schedules, keep the default purpose of **By-appt**.
  5. **Select the location for the schedule** from the dropdown menu in the “In” field. For Nicholson schedules, keep the default location of **Nicholson**.

Katie L. Admin Visits Schedules Staff Logout Wednesday, September 18th 2019 - Fall 2019

**Create schedule**

**Time & consultant**

Add a consultant Add a time slot Remove this group

2	45 mins @	3	for	4	in	5	project:	Remote only
---	-----------	---	-----	---	----	---	----------	-------------

Show Reservation Options

Fall 2019 All days Monday Tuesday Wednesday Thursday Friday

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

**Note**

note

Remove note Create schedule

If you are creating more than one schedule slot on the same day, add multiple schedule slots at a time by clicking the blue **Add a time slot** hyperlink at the top of the page and entering the correct information in the fields below.

**Create schedule** Thursday, October 24th 2013 - Summer 2015

**Time & consultant**

**Add a consultant** **Add a time slot** **Remove this group**

45 mins @ 11:15 for By-appt in Nicholson project: Observation <input type="checkbox"/> Remote only
Reserved for: Rose Miron
45 mins @ for in project: Observation <input type="checkbox"/> Remote only
Reserved for:

Show Reservation Options

6. Set the date for the new schedule. Select the correct date from the calendar (see below).

7. Add a note so other staff members will know why the new schedule was created.

8. Click Create Schedule at the bottom of the page to finalize the changes.

**Create schedule** Monday, November 25th 2013 - Summer 2015

**Time & consultant**

**Add a consultant** **Add a time slot** **Remove this group**

45 mins @ 11:15 for By-appt in Nicholson project: Observation <input type="checkbox"/> Remote only
Reserved for:
45 mins @ 12:00 for Reading in Online project: Observation <input type="checkbox"/> Remote only
Reserved for:
45 mins @ 13:30 for Chat in Online project: Observation <input type="checkbox"/> Remote only
Reserved for:
45 mins @ 12:45 for By-appt in Nicholson project: Observation <input type="checkbox"/> Remote only
Reserved for:

Show Reservation Options

Fall 2013

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

**Note**

subbing for Zack

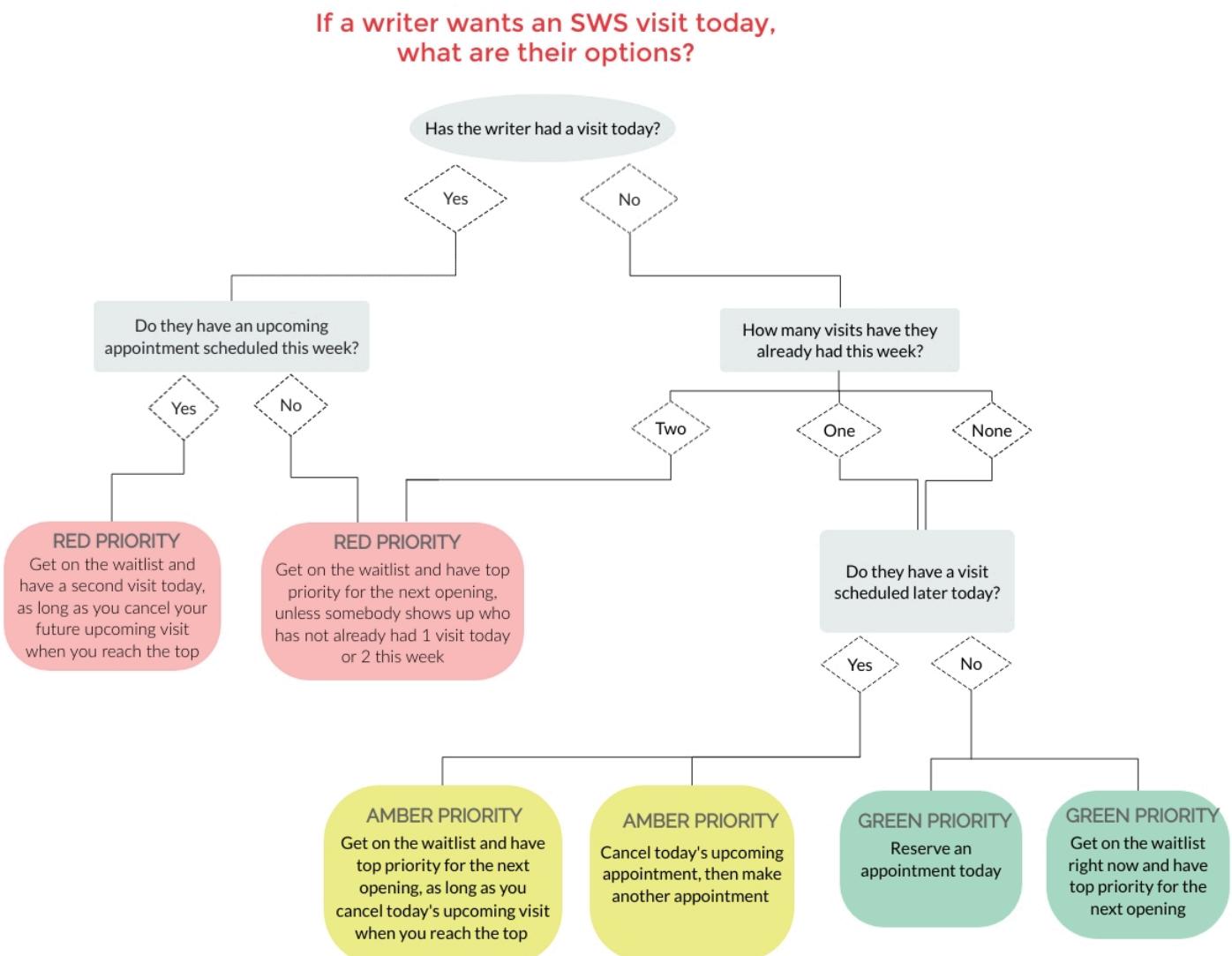
7 note

**Remove note**

8 Create schedule

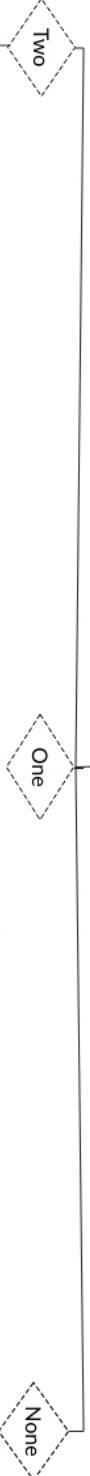
# APPENDIX A: PRIORITY STATUS FLOWCHARTS

The diagrams here and on page 38 illustrate a writer's options for a visit today or a visit later in the week, depending on their past and upcoming visits. As an attendant, you typically don't need to worry about what options are available to a student because the database will lead you through the available visit options. However, it may be helpful to know how priority status works so you can explain it to any writers with questions on why their status constrains their options for a visit.



If a writer wants an SWS visit later in the week, what are their options?

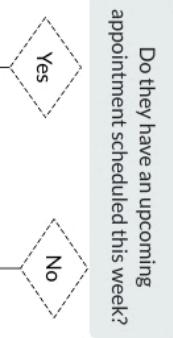
How many visits has the writer already had this week?



Do they have an upcoming appointment scheduled this week?



Do they have an upcoming appointment scheduled this week?



**RED PRIORITY**  
Get on the waitlist and have top priority for the next opening, unless somebody shows up who has not already had 1 visit today or 2 this week

**AMBER PRIORITY**

Cancel the upcoming appointment, then make another appointment

**GREEN PRIORITY**

Reserve **one** appointment for, or have priority for one walk-in visit on a day later in the week

**GREEN PRIORITY**

Reserve **two** appointments for, or have priority for two walk-in visits on, any two days this week

Get on the waitlist and have top priority for the next opening, as long as you cancel the upcoming visit when you reach the top

Get on the waitlist right now and have top priority for the next opening

OR

OR

OR

OR