Raymond A. Mason
School of Business
WILLIAM & MARY

THE
BOEHLY CENTER
FOR EXCELLENCE IN FINANCE

HOW TO BOOK APPOINTMENTS WITH BOEHLY CENTER STAFF (BCS)

The Boehly Center launched a new appointment and check-in system in Fall 2020.

Please find the procedures outlined below.

➢ General Information

1) All meetings must be requested & approved 24 hours in advance of the desired date unless you have received permission from your BCS for an appointment within 24 hours.

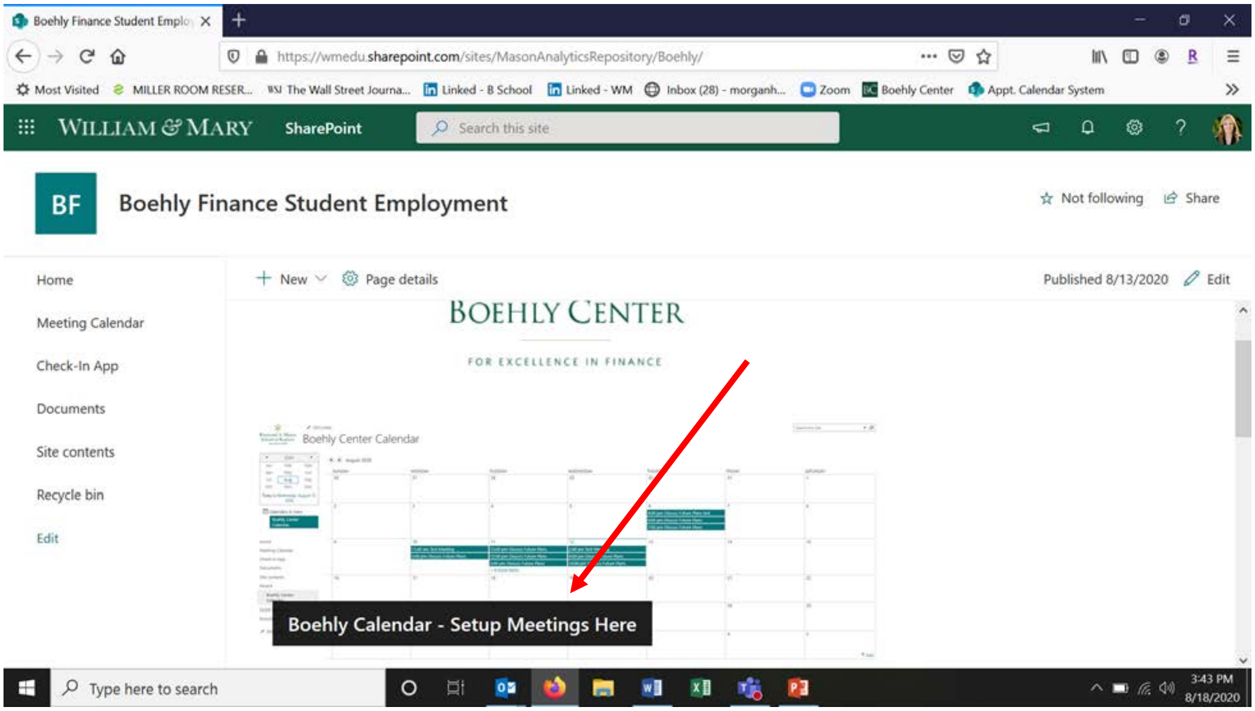
2) Please note if you are requesting in person meetings, BCS are not in the office every-day due to COVID-19 protocol, therefore, please see in-person schedules below.
   a. Megan Branch (only available via Zoom) – Clubs, Reimbursements, General Info
   b. Morgan Hutter (Mon. & Tues.) – Alumni/Employer Connections & Career Readiness
   c. Melanie Weast (Tues., Wed., & Thurs.) – Academic Advising & Programs
   d. Jad Howell (Mon. – Fri.)

3) Please know your meeting is not yet confirmed until you receive an “approved” email as outlined below.

➢ Setting Up a Meeting

1) Go to https://wmedu.sharepoint.com/sites/MasonAnalyticsRepository/Boehly/

2) Click on “Boehly Calendar – Setup Meetings Here”


Boehly Finance Student Employ
https://wmedu.sharepoint.com/sites/MasonAnalyticsRepository/Boehly/
Most Visited
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Boehly Center
Appt. Calendar System
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SharePoint
Search this site
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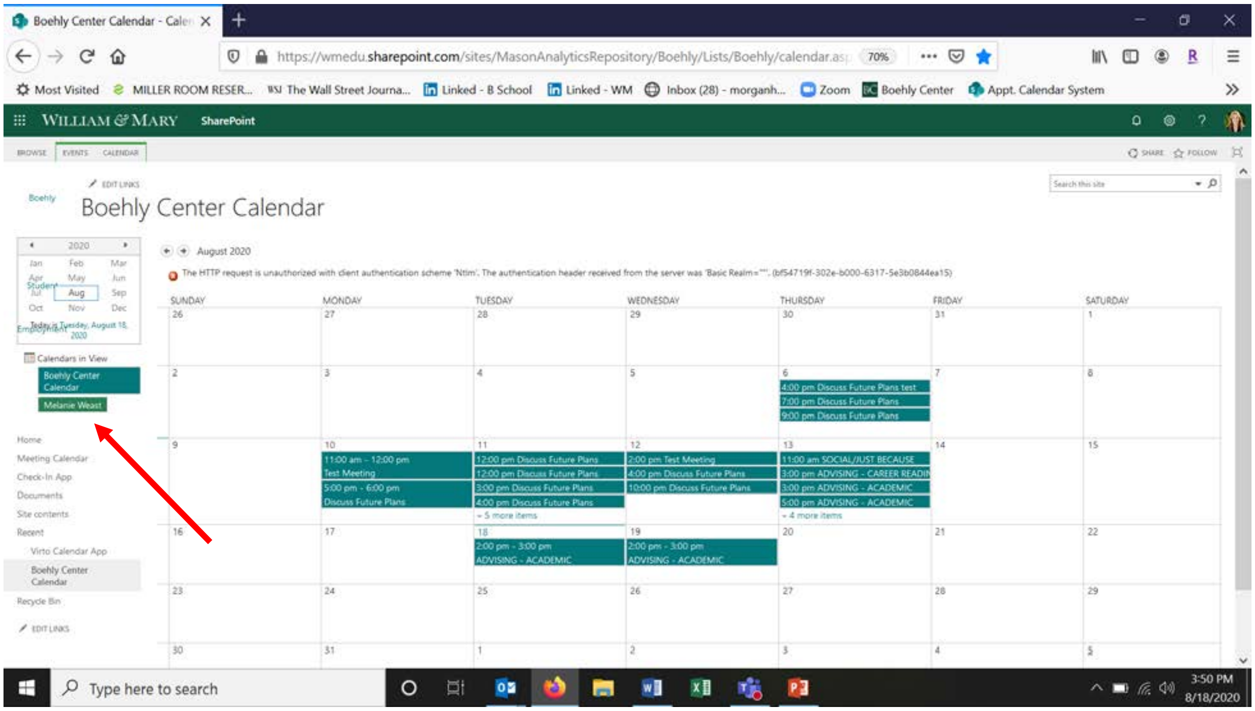
Not following
Share
Home
Meeting Calendar
Check-In App
Documents
Site contents
Recycle bin
Edit
New
Page details
Published 8/13/2020
Edit
BOEHLY CENTER
FOR EXCELLENCE IN FINANCE
Boehly Center Calendar
Boehly Calendar - Setup Meetings Here
Type here to search
3:43 PM
8/18/2020

3) Determine the availability of your requested BCS BEFORE booking a time. To do this follow these steps and see screenshots below:
   a. Go to the tab on the left and click the BCS's name (Melanie Weast, Morgan Hutter, Megan Branch or Jad Howell).
   b. This will bring you to their respective BCS's calendar. Search for the day(s) you are interested in meeting and look for time slots that are blank or labeled "free". You may set the calendar up by day, week or month.
   c. Write down or note the available windows as you'll need them for the next step.



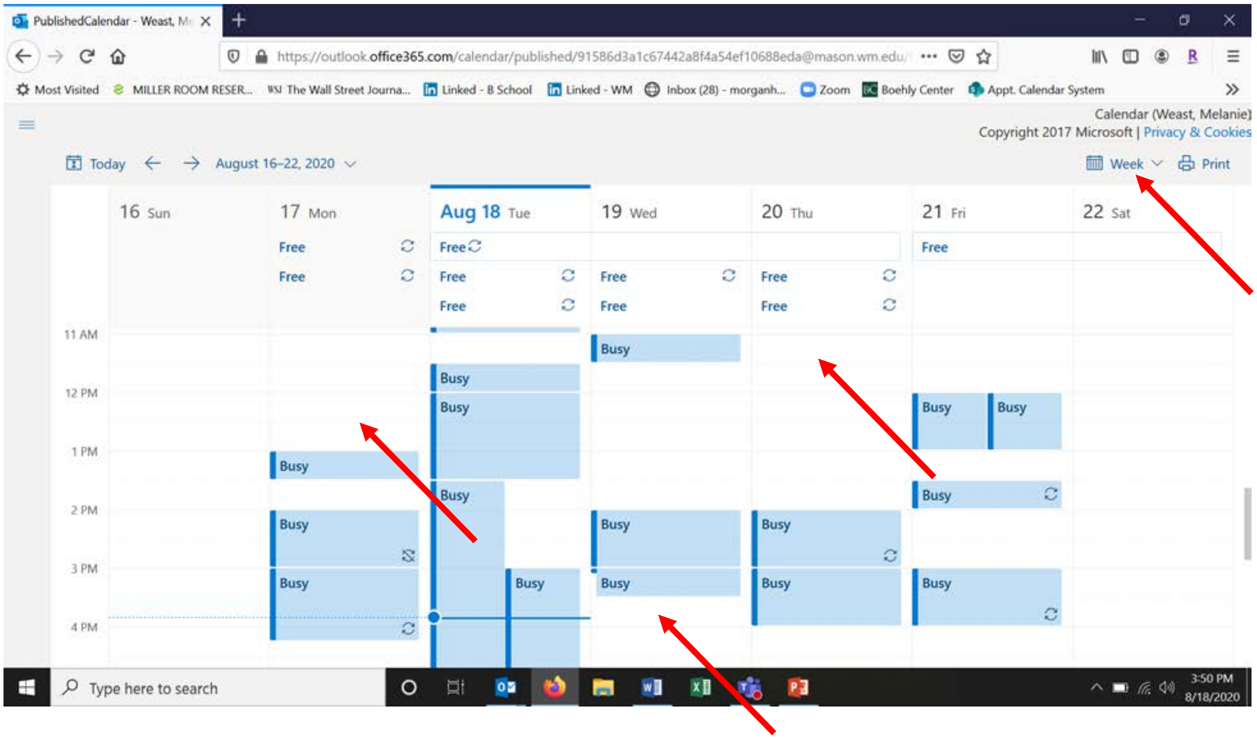
Boehly Center Calendar

August 2020

The HTTP request is unauthorized with client authentication scheme 'Ntlm'. The authentication header received from the server was 'Basic Realm=""'. (bf54719f-302e-b000-6317-5e3b0844ea15)

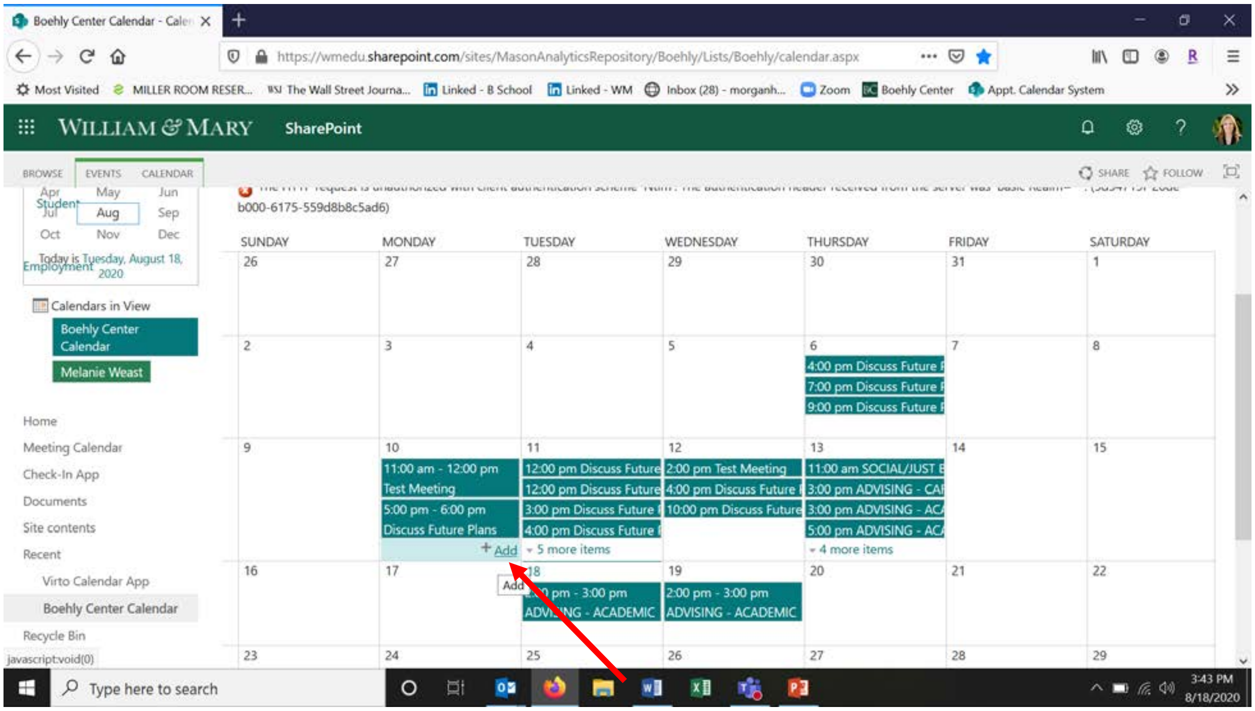
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
26	27	28	29	30	31	1
2	3	4	5	6 4:00 pm Discuss Future Plans test 7:00 pm Discuss Future Plans 9:00 pm Discuss Future Plans	7	8
9	10 11:00 am - 12:00 pm Test Meeting 5:00 pm - 6:00 pm Discuss Future Plans	11 12:00 pm Discuss Future Plans 12:00 pm Discuss Future Plans 3:00 pm Discuss Future Plans 4:00 pm Discuss Future Plans + 5 more items	12 2:00 pm Test Meeting 4:00 pm Discuss Future Plans 10:00 pm Discuss Future Plans	13 11:00 am SOCIAL/JUST BECAUSE 3:00 pm ADVISING - CAREER READIN 3:00 pm ADVISING - ACADEMIC 5:00 pm ADVISING - ACADEMIC + 4 more items	14	15
16	17	18 2:00 pm - 3:00 pm ADVISING - ACADEMIC	19 2:00 pm - 3:00 pm ADVISING - ACADEMIC	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Boehly Center Calendar - Calen
https://wmedu.sharepoint.com/sites/MasonAnalyticsRepository/Boehly/Lists/Boehly/calendar.asp
WILLIAM & MARY
SharePoint
Calendars in View
Boehly Center Calendar
Melanie Weast
Home
Meeting Calendar
Check-In App
Documents
Site contents
Recent
Virto Calendar App
Boehly Center Calendar
Recycle Bin
Type here to search
3:50 PM
8/18/2020



PublishedCalendar - Weast, M
https://outlook.office365.com/calendar/published/91586d3a1c67442a8f4a54ef10688eda@mason.wm.edu/
Calendar (Weast, Melanie)
Copyright 2017 Microsoft | Privacy & Cookies
Today
August 16–22, 2020
Week
Print
16 Sun
17 Mon
Aug 18 Tue
19 Wed
20 Thu
21 Fri
22 Sat
Free
Busy
11 AM
12 PM
1 PM
2 PM
3 PM
4 PM
Type here to search
3:50 PM
8/18/2020

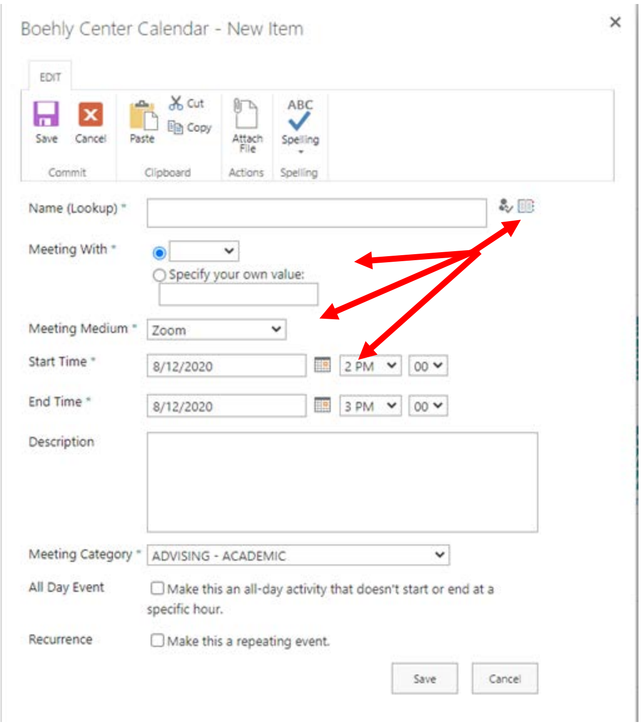
4) Click the “back arrow” to return to the main calendar in SharePoint. Find the date of interest that was available and scroll your mouse to the bottom right of that date. Click “add” when it appears.


Boehly Center Calendar - Calen
https://wmedu.sharepoint.com/sites/MasonAnalyticsRepository/Boehly/Lists/Boehly/calendar.aspx
Most Visited
MILLER ROOM RESER...
The Wall Street Journa...
Linked - B School
Linked - WM
Inbox (28) - morganh...
Zoom
Boehly Center
Appt. Calendar System
WILLIAM & MARY
SharePoint
BROWSE
EVENTS
CALENDAR
SHARE
FOLLOW
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Student
Employment
Today is Tuesday, August 18, 2020
Calendars in View
Boehly Center Calendar
Melanie Weast
Home
Meeting Calendar
Check-In App
Documents
Site contents
Recent
Virto Calendar App
Boehly Center Calendar
Recycle Bin
javascript:void(0)
Add
Type here to search
3:43 PM
8/18/2020

b000-6175-559d8b8c5ad6)

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
26	27	28	29	30	31	1
2	3	4	5	6 4:00 pm Discuss Future 7:00 pm Discuss Future 9:00 pm Discuss Future	7	8
9	10 11:00 am - 12:00 pm Test Meeting 5:00 pm - 6:00 pm Discuss Future Plans + Add	11 12:00 pm Discuss Future 12:00 pm Discuss Future 3:00 pm Discuss Future 4:00 pm Discuss Future 5 more items	12 2:00 pm Test Meeting 4:00 pm Discuss Future 10:00 pm Discuss Future	13 11:00 am SOCIAL/JUST 3:00 pm ADVISING - CA 3:00 pm ADVISING - AC 5:00 pm ADVISING - AC 4 more items	14	15
16	17	18 pm - 3:00 pm ADVI NG - ACADEMIC	19 2:00 pm - 3:00 pm ADVISING - ACADEMIC	20	21	22
23	24	25	26	27	28	29

5) Complete appointment details/requirements.
   a. Search for your **LAST** name (if it is not auto-listed, please email selected BCS {FirstName.LastName@mason.wm.edu} with your time and meeting request details)
   b. Select the BCS you plan to meet with on the Boehly Center team
   c. Select if you’d like the meeting to be in person or remote (via Zoom)
      i. Please note if you are requesting in person meetings, BCS are not in the office everyday due to COVID-19 protocol, so please see schedule below.
      ii. In person schedule: Morgan (Mon. & Tues.), Melanie (Tues., Wed., & Thurs.), Jad (Mon. – Fri.), Megan (only available via Zoom)
   d. Enter date & time based on BCS availability
   e. Enter a brief description or reason for meeting. If you have specific questions/needs, please put them here so we can prepare for your meeting. You may also attach any documents you’d like us to review.
   f. Select the meeting category from the provided drop-down selections
   g. Click save. Please know your meeting is not yet confirmed until you receive an “approved” email as outlined below
   h. If you get an error that says “The HTTP request was forbidden with client authentication scheme 'Ntlm'. (b045719f-b07b-b000-5536-74b065f82fc0)” – ignore it


EDIT
Save
Cancel
Cut
Copy
Paste
Attach File
Spelling
Commit
Clipboard
Actions
Spelling
Save
Cancel

Boehly Center Calendar - New Item

Name (Lookup) *

Meeting With * ● ○ Specify your own value:

Meeting Medium * Zoom

Start Time * 8/12/2020 2 PM 00

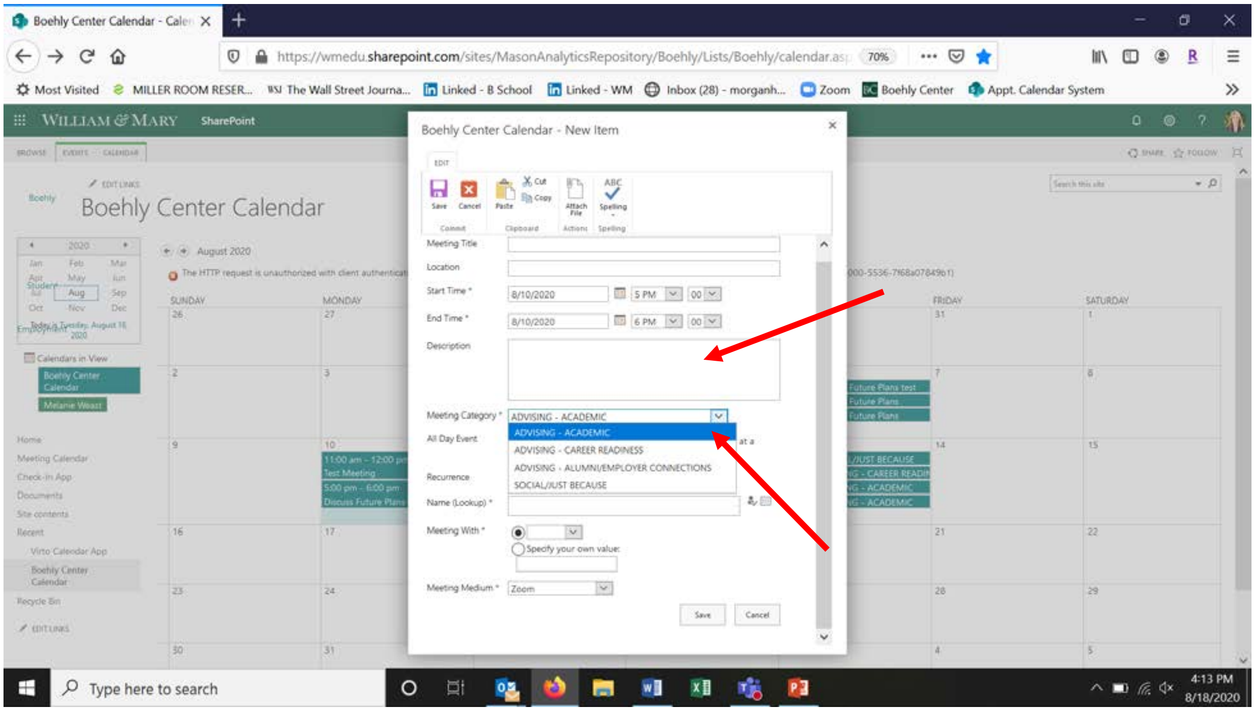
End Time * 8/12/2020 3 PM 00

Description

Meeting Category * ADVISING - ACADEMIC

All Day Event ☐ Make this an all-day activity that doesn't start or end at a specific hour.

Recurrence ☐ Make this a repeating event.


Boehly Center Calendar - Calen
https://wmedu.sharepoint.com/sites/MasonAnalyticsRepository/Boehly/Lists/Boehly/calendar.asp
70%
Most Visited
MILLER ROOM RESER...
The Wall Street Journa...
Linked - B School
Linked - WM
Inbox (28) - morganh...
Zoom
Boehly Center
Appt. Calendar System
WILLIAM & MARY
SharePoint
Boehly
Boehly Center Calendar
August 2020
SUNDAY
MONDAY
FRIDAY
SATURDAY
Home
Meeting Calendar
Check-In App
Documents
Site contents
Recent
Boehly Center Calendar
Recycle Bin
EDIT
Save
Cancel
Cut
Copy
Paste
Attach File
Spelling
Commit
Clipboard
Actions
Spelling
Save
Cancel
Type here to search
4:13 PM
8/18/2020

Boehly Center Calendar - New Item

Meeting Title

Location

Start Time * 8/10/2020 5 PM 00

End Time * 8/10/2020 6 PM 00

Description

Meeting Category * ADVISING - ACADEMIC
- ADVISING - ACADEMIC
- ADVISING - CAREER READINESS
- ADVISING - ALUMNI/EMPLOYER CONNECTIONS
- SOCIAL/JUST BECAUSE

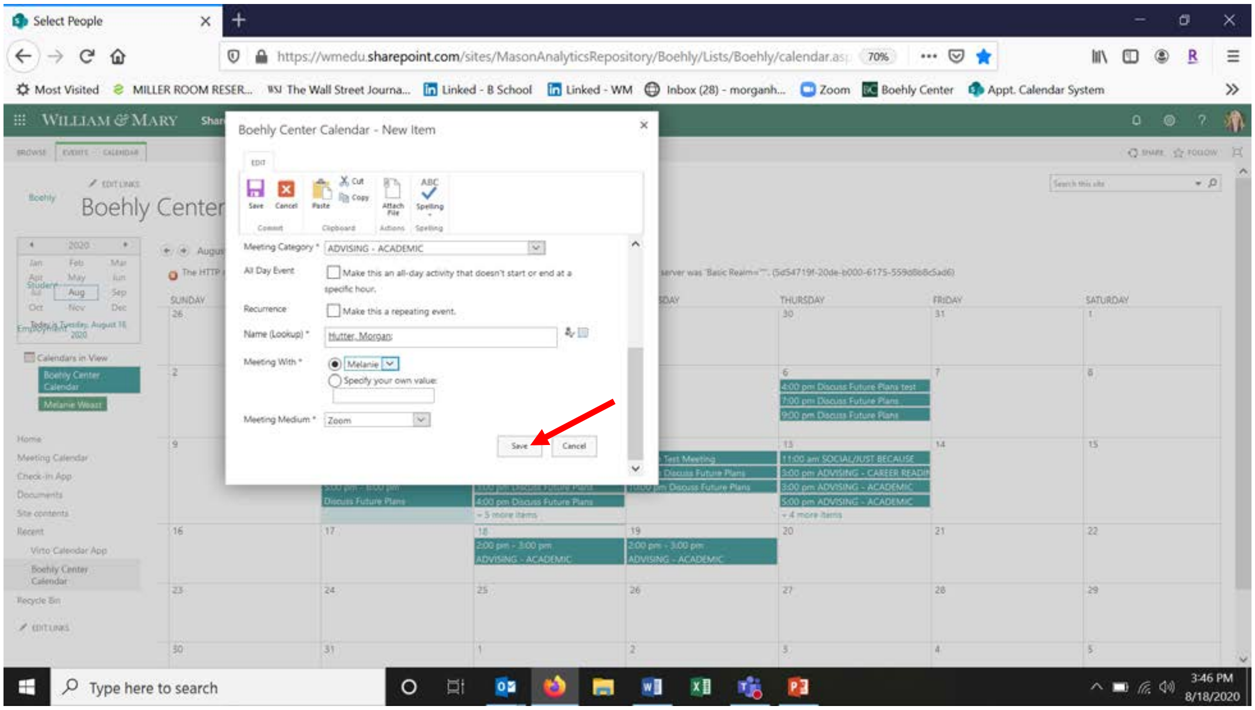
All Day Event

Recurrence

Name (Lookup) *

Meeting With * ● ○ Specify your own value:

Meeting Medium * Zoom



Boehly Center Calendar - New Item

Meeting Category * ADVISING - ACADEMIC

All Day Event ☐ Make this an all-day activity that doesn't start or end at a specific hour.

Recurrence ☐ Make this a repeating event.

Name (Lookup) * Hutter, Morgan;

Meeting With * ● Melanie ○ Specify your own value:

Meeting Medium * Zoom

Save Cancel

Select People
https://wmedu.sharepoint.com/sites/MasonAnalyticsRepository/Boehly/Lists/Boehly/calendar.as
Most Visited
MILLER ROOM RESER...
The Wall Street Journa...
Linked - B School
Linked - WM
Inbox (28) - morganh...
Zoom
Boehly Center
Appt. Calendar System
WILLIAM & MARY
Boehly Center
EDIT
Save
Cancel
Paste
Cut
Copy
Attach File
Spelling
Commit
Clipboard
Actions
Spelling
SUNDAY
THURSDAY
FRIDAY
SATURDAY
Home
Meeting Calendar
Check-in App
Documents
Site contents
Recent
Virto Calendar App
Boehly Center Calendar
Recycle Bin
Type here to search
3:46 PM
8/18/2020

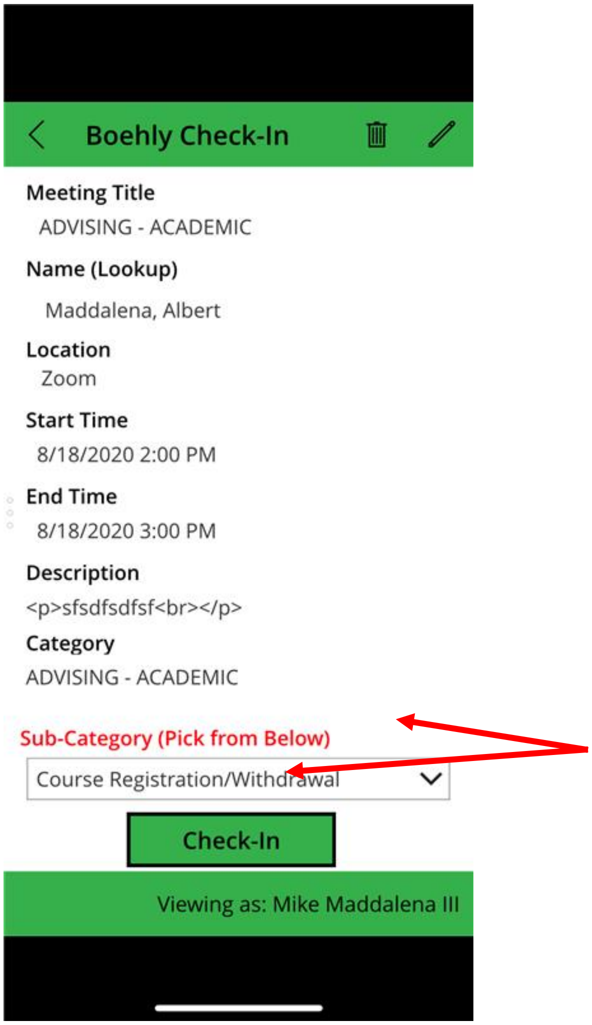
6) A notification will be sent to the BCS of that you have requested a meeting. Once approved by the BCS, you will receive an approval email with additional details.
   a. If declined/adjusted, you will receive personalized email from your BCS with a request to adjust accordingly
   b. Please save approval email as it has details about in-person/Zoom requirements
   c. If you need to change or cancel your appointment, please email the BCS directly.
   d. If you do not receive an acceptance within 24 hours of requesting your appointment, please email the BCS directly (FirstName.LastName@mason.wm.edu).

➢ Day-Of Meeting

1) If in person:
   a. Upon arrival at the Boehly Center you will see a laptop/tablet with the schedule for the day.
   b. If you have pre-booked an appointment, find your name and click "Check-In"
   c. If you have not pre-booked an appointment, click "Meet Now" and complete the prompts following the steps from 3-5 outlined above.
   d. At the bottom of the screen once you "Check-In" it will ask if you are meeting for a "sub-category" or another reason. If so, please select the main reason for the meeting.
   e. In order to provide a safe meeting environment, please follow the below safety guidelines when checking-in to The Boehly Center (Miller Hall 2002).
      i. You will check-in at the double doors of Suite 2002 using the device located at the entrance table. Please use a CLEAN stylus pen and put it in the "dirty" bin when done.
      ii. Please **do NOT cross** the table/tape barrier.
      iii. Wearing a mark is required at **ALL times**.
      iv. BCS will receive a notification that you are here and bring you into the conference room.

2) If via Zoom:

a. Visit: https://apps.powerapps.com/play/f5495751-aea2-48fd-9e8c-42c3acb0028f?tenantId=b93cbc3e-661d-4058-8693-a897b924b8d7
b. If you have pre-booked an appointment, find your name and click “Check-In”
c. If you have not pre-booked an appointment, click “Meet Now” and complete the prompts following the steps from 3-5 outlined above.
d. At the bottom of the screen once you “Check-In” it will ask if you are meeting for a “sub-category” or another reason. If so, please select the main reason for the meeting.
e. BCS will receive a notification that you are in the Zoom and join you shortly.


Boehly Check-In
Check-In
Viewing as: Mike Maddalena III

Meeting Title
ADVISING - ACADEMIC

Name (Lookup)
Maddalena, Albert

Location
Zoom

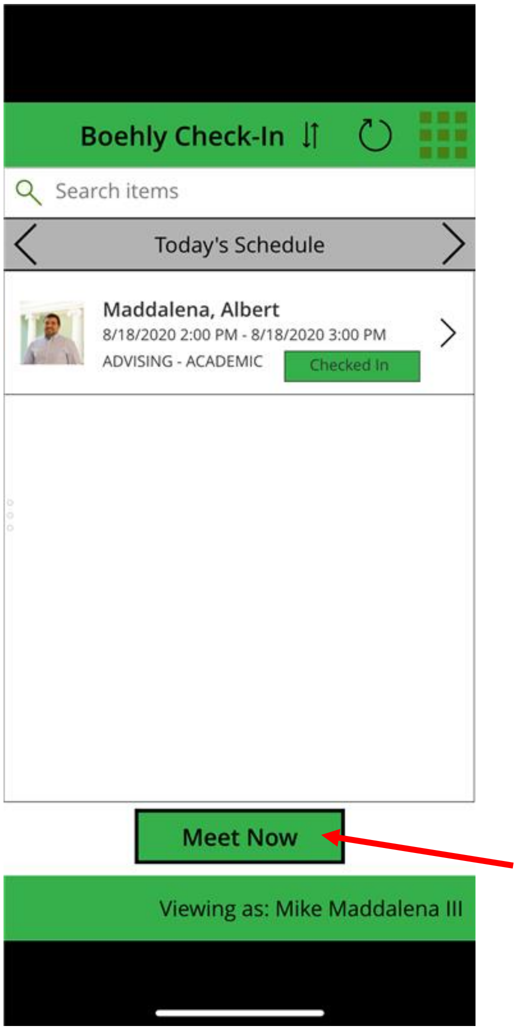
Start Time
8/18/2020 2:00 PM

End Time
8/18/2020 3:00 PM

Description
<p>sfsdfsdfsf
</p>

Category
ADVISING - ACADEMIC

Sub-Category (Pick from Below)
Course Registration/Withdrawal


Boehly Check-In
Search items
Today's Schedule
Checked In
Meet Now
Viewing as: Mike Maddalena III

Maddalena, Albert
8/18/2020 2:00 PM - 8/18/2020 3:00 PM
ADVISING - ACADEMIC