

Getting Started with Web Scheduling

Overview

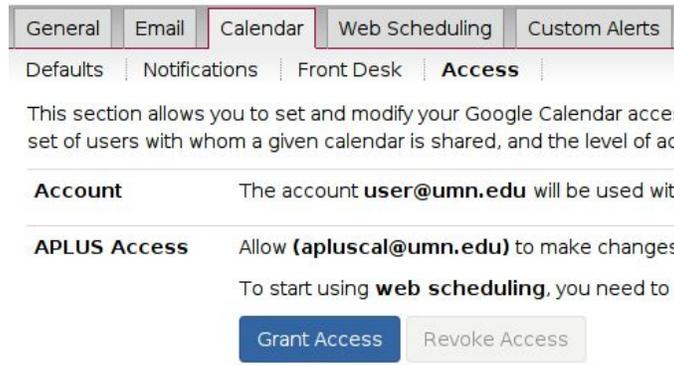
It allows students to schedule, reschedule and cancel appointments with staff online.

There are three steps required to get started with web scheduling:

Step 1: Share your Calendar with APLUS (required)

Where: Preferences > Calendar > Access

Here, you will need to grant APLUS access to your calendar. Make sure you click the blue **"Grant Access"** button.



General	Email	Calendar	Web Scheduling	Custom Alerts
Defaults	Notifications	Front Desk	Access	
This section allows you to set and modify your Google Calendar access set of users with whom a given calendar is shared, and the level of ac				
Account	The account user@umn.edu will be used with			
APLUS Access	Allow (apluscal@umn.edu) to make changes			
	To start using web scheduling , you need to			
	Grant Access	Revoke Access		

Step 2: Create your custom URL (required)

Where: Preferences > Web Scheduling > URLs

Create web addresses, or URLs, which you can direct students to for online appointment scheduling.

Unit

Select the unit that is relevant to this URL.

Public URL

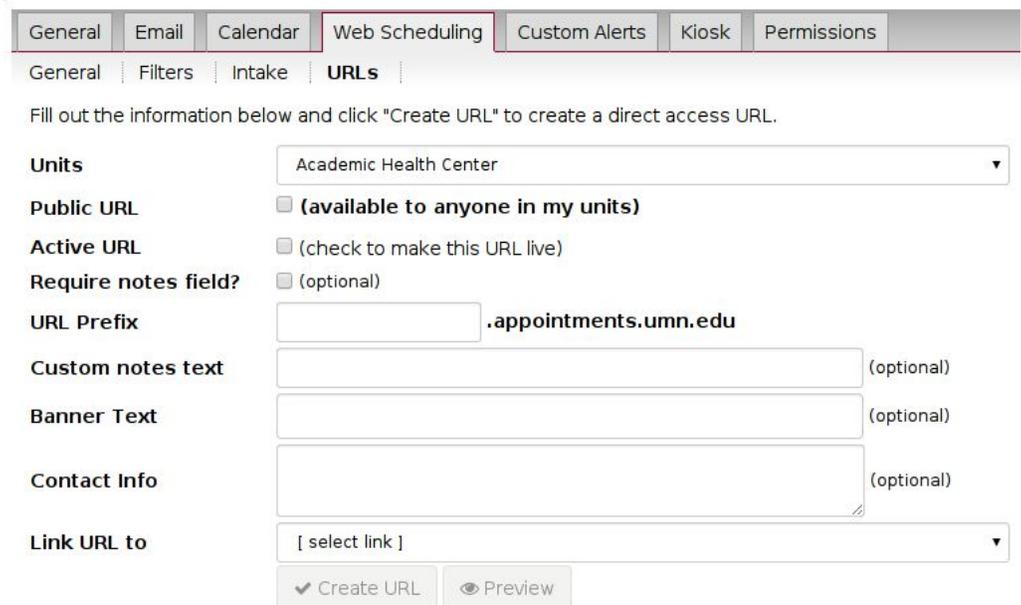
If you would like to share it with other staff in your unit.

Active URL

Once you're done setting it up. (Uncheck it later if you want to take the URL offline).

Require notes field

Students are presented with a comment box before scheduling an appointment which are displayed in the staff calendar as prep notes. By default students are not required to enter any notes. Change this as needed.



General	Email	Calendar	Web Scheduling	Custom Alerts	Kiosk	Permissions
General	Filters	Intake	URLs			
Fill out the information below and click "Create URL" to create a direct access URL.						
Units	Academic Health Center					
Public URL	<input type="checkbox"/> (available to anyone in my units)					
Active URL	<input type="checkbox"/> (check to make this URL live)					
Require notes field?	<input type="checkbox"/> (optional)					
URL Prefix	.appointments.umn.edu					
Custom notes text	(optional)					
Banner Text	(optional)					
Contact Info	(optional)					
Link URL to	[select link]					
	Create URL	Preview				

URL Prefix

Add a name to your URL. e.g., *james, cla-advising, csom*.

Custom Notes

Add custom notes if you would like to display some additional information to the student while he/she is selecting a staff member from the list shown.

Banner Text

You can add optional banner text that will be displayed in the upper part of the web scheduling website. e.g., *"CLA Advising Online Schedule"*

Contact Info

You can also add contact information to the online scheduling page.

Link URL to

Select the appropriate place to link the URL. If you are sharing this URL with your unit, then you probably want to select either an **Intake** or **Staff List**. If the URL is for yourself, then you can pick **"My Public Schedule"**

- *Intake Process*: a questionnaire which students complete prior to scheduling an appointment.
- *Staff List*: students pick a staff from the presented list.
- *My Public Schedule*: will lead the student directly to your available appointment blocks.

Note: You may click Preview to view what your URL will look like to students.

Step 3: Create your Availability (required)

Where: APLUS Calendar

1. Click on the day and time you'd like to set up appointment slots. Hold and drag to adjust the length of time.
2. Click on the **"Appointment Slots"** tab.
3. Choose the type of appointment block: *Appointments, Drop-ins, Workshops*.
4. Choose the relevant unit for this block.
5. Check the **"Web Accessible"** box to make appointment slots available to students for online scheduling.
6. Select a filter from the drop down menu. New filters can be added by creating custom filters. See section below.
7. If you wish to make the appointment block available to only certain students, click the Private button.

Note, private blocks will generate a block-specific URL for the student to access that particular block. Simply create the appointment block, save your changes, and click on it again to copy/paste the generated URL.

You can also make it **repeat over** a period of time like once a week or every other Tuesday. Repeating events saves you the time and effort it would take to create multiple separate events and lets you easily change all events in the series at once. This can be set at the bottom part of the *"Event Details"* panel.

At this point your availability should be ready for students to start scheduling appointments. It's highly recommended to preview your URL so you are sure targeted students can see your appointment blocks.

Step 4: Web Scheduling Preferences (optional)

Where: Preferences > Web Scheduling > General

Here, you can setup your constraints for appointments scheduled online, including the following options:

1. Minimum and maximum number of weekdays from today in which student can schedule appointments, i.e., *no same-day appointments, appointments scheduled up to a month in advance, etc.*
2. Cancellation policy: setting the definition for a “late” cancellation, how many late cancellations before preventing online scheduling (for example), including no-shows/late reschedules as cancellations, and so on.
3. Maximum number of appointments for any given student in a week
4. Maximum number of appointments for a staff member in a day
5. Whether or not to have newly created appointment slots default to being web accessible
6. Default filter for a newly created appointment slot.

The screenshot shows the 'Web Scheduling' tab in a preferences menu. The 'General' sub-tab is active. The page title is 'General | Filters | Intake | URLs'. Below the title, it says 'Here you can set your scheduling parameters.' The form contains several sections:

- Units:** A dropdown menu set to 'Academic Health Center'.
- Students can schedule appts:** Includes 'No earlier than' (1 weekday(s) from today), a checked checkbox for '... and up to' (31 weekday(s) from today), and an unchecked checkbox for 'Enforce within this unit'.
- Cancellations:** Includes 'If student cancels' (1 day(s) prior to appointment), checkboxes for 'Include late reschedules as cancellations', 'Email staff member', and 'Show information box', and 'If student cancels' (2 times in 1 week).
- Max # of appts for students:** Includes '2 appointment(s) with this u per week', a checked checkbox for '... and no more than 1 appointment(s) with this u per day', and an unchecked checkbox for 'Enforce within this unit'.
- Max # of appts for staff:** Includes '6 appointments per day' and an unchecked checkbox for 'Enforce within this unit'.
- Default appt-slots web accessible:** Includes a dropdown set to 'No', and checkboxes for 'Set as default for this unit' and 'Enforce within this unit'.
- Default filter:** A dropdown menu set to 'Unit Defau'.

Step 5: Custom Filters (optional)

Where: Preferences > Web Scheduling > Filters

This is where you can create sets of rules, called “filters” in APLUS, which can be used to limit your online appointment availability to just those students who meet the filter criteria.

The screenshot shows the 'Filters' tab in a preferences menu. The page title is 'General | Filters | Intake | URLs'. Below the title, it says 'Please select one or multiple attributes in order to create a filter and match students against. Each filter will appear under the appointment slot your APLUS calendar.' The form contains several sections:

- Units:** A dropdown menu set to 'All Units'.
- Show unit drop-down:** A dropdown menu set to 'No'.
- Filter name:** A text input field containing 'My Lower Division Advisees'.
- Filter:** A section with a dropdown menu set to 'Require any one of the following attributes.' and two filter rules:
 - Academic Level is equal to Freshman
 - Assigned to My Units is equal to College of Liberal Arts

Filters are an incredibly powerful way of customizing your availability:

1. Create your own set of personal appointment slot filters or make them available for others in your unit using the **“Private/Public”** drop-down menu next to the the units drop down list.
2. Use **“+ Add Filter Attributes”** to build your set(s) of requirements - keep it simple or setup complex combinations to meet you and your unit’s needs.
3. Use *group/attribute* options to have complete control over your availability e.g., *“everyone in my college except for those who’ve applied to graduate”*.

Step 6: Intakes Processes (optional)

Where: Preferences > Web Scheduling > Intake

Available only to unit coordinators.

In this section, you can create questionnaires called Intake Processes, which students complete prior to scheduling an appointment with staff.

The screenshot shows the 'Web Scheduling' tab in the APLUS interface, specifically the 'Intake' sub-tab. The page has a navigation bar with tabs: General, Email, Calendar, Web Scheduling (selected), Custom Alerts, Kiosk, and Permissions. Below this is a sub-navigation bar with 'General', 'Filters', 'Intake' (selected), and 'URLs'. The main content area contains the following fields:

- Units:** A dropdown menu set to '[none]' and a checkbox for 'Global'.
- Banner Text:** A text input field containing 'CLA Online Scheduling Questionnaire' with '(optional)' to its right.
- Intake name:** A text input field containing 'CLA Questionnaire'.
- Split questions across multiple pages?:** A dropdown menu set to 'No'.
- Intake:** A section containing:
 - Ques / Ans:** A text input field containing 'What is the reason of your appointment?'.
 - Action:** A dropdown menu set to 'Continue'.
 - Display:** A dropdown menu set to 'None'.
 - Assign adhoc tags:** A blue button labeled '+ Add a tag'.
 - Assign purpose tags:** A dropdown menu set to '[add purpose tag]'.
 - Parent:** A dropdown menu set to 'None - [root level]'.
 - A blue button labeled '+ Insert Question/Answer' at the bottom.

1. Completed intakes from students can be viewed in your APLUS Calendar (if they setup an appointment) and/or in the student’s contact log in APLUS
2. You can use the **“Stop”** action to end the intake process prior to reaching the calendar of staff availability and instead display an information box to the student e.g., *“Call the front desk”*
3. Questions can be nested within other questions for arbitrarily complex intake processes
4. You can have questions link to other intake processes, which is useful for multi-unit appointment scheduling i.e., student selects the unit they’d like to meet with and that unit wants to collect some additional information before letting the student select a time to meet
5. Units can have as many intake processes as they’d like

What would students see?

The screenshot shows the 'Appointments' page for James Rue. At the top, the University of Minnesota logo and 'Driven to Discover' slogan are visible. The page title is 'Appointments' and the user's name 'James' Online Schedule' is displayed. Navigation links for 'Home' and 'Schedule' are present, along with 'End Preview' and 'Contact Us' buttons.

Appointment availability for James Rue

Please select the time that works best for you given James Rue's availability. In order to view availability for future weeks, please click the arrows at the top-left corner of the calendar.

Available Times for James Rue

- Thu, Jul 16 2015 - 12PM - 12:30PM **First available**
- Thu, Jul 16 2015 - 12:30PM - 1PM
- Thu, Jul 16 2015 - 2PM - 2:30PM
- Thu, Jul 16 2015 - 2:30PM - 3PM
- Fri, Jul 17 2015 - 12PM - 12:30PM
- Fri, Jul 17 2015 - 12:30PM - 1PM
- Fri, Jul 17 2015 - 2PM - 2:30PM
- Fri, Jul 17 2015 - 2:30PM - 3PM

Please enter any notes you'd like to share with James prior to the appointment:

Book Appointment

The calendar view shows a weekly grid from Monday, July 13 to Friday, July 17. The time slots range from 8AM to 7PM. Appointments are scheduled for Thursday, July 16 and Friday, July 17. The legend indicates: Available Slots (light blue), My Appointments (dark blue), and My Classes (red).

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Basic Operations (Student Interface)

How to Cancel an Appointment

In the web scheduling interface, students are able to cancel a scheduled appointment. This can be done by clicking on the **"Home"** button located at the upper-left corner of the page.



If there is an appointment scheduled, it will show up under **“My Upcoming Appointments”**. Click **“Cancel”** to proceed canceling the appointment.

JUL
17
2015

Meeting with: Gerardo Orellana
Location: 190 Hanson Hall
From 5PM to 5:30PM (30 mins)

Reschedule Cancel

Scheduled

How to Reschedule an Appointment

In the web scheduling interface, students are able to reschedule a scheduled appointment. This can be done by clicking on the **“Home”** button located at the upper-left corner of the page.



If there is an appointment scheduled, it will show up under **“My Upcoming Appointments”**. Click **“Reschedule”** to select a different date/time with the adviser selected on the original appointment.

JUL
17
2015

Meeting with: Gerardo Orellana
Location: 190 Hanson Hall
From 5PM to 5:30PM (30 mins)

Reschedule Cancel

Scheduled