

ACCUTRACK VIEW APPOINTMENTS SETUP OPTIONS

Purpose: The **Appointments Options** screen is the default screen loaded on the left-side menu of the **View Appointments Setup** screen which has additional sections related to **Appointments Setup** under it.

Access: the Appointments Setup options, click **View Appointments** in **System Administration**, then the **Setup** tab on the bottom-right section of the screen.

The **View Appointments Setup Options** are exactly the same as the **Setup** options in the **Set Appointments > Setup** screen.

Before creating appointments, you will need to enter your [tutors](#), their [schedules](#), and the services they provide (their [activity assignments](#)). See other sections in this manual for instructions on how to do this. You will also need to set up your appointment preferences as explained below.

Here are the Control Panel options for View Appointments in Setup:

- **Appointments Options** – Used to configure how appointments can be scheduled, including when and for how long. Also used to set up how you handle group appointments and to make rules to determine how early or late the student can be and still receive credit for the

appointment.

- **Email Confirmation Options** – Used to configure the various emails that go out for students and tutors when appointments are created, rescheduled, or canceled.
- **Email Reminders Options** – Used to configure the emails that can go out to students reminding them of their upcoming appointments and/or configure the emails that go out when students fail to show up appointments.
- **Restrictions Options** – Used to configure various appointment restriction settings.

APPOINTMENTS OPTIONS

Only allow appointment sign-ins (no walk-ins): If this option is checked, **AccuSQL/AccuTrack** will only allow students to sign in if they are signing in for an existing appointment. Students who have not scheduled an appointment in advance will not be able to sign in.

Only allow appointments X in advance: This is the maximum number of days or weeks in advance that an appointment can be scheduled. For example, if you set this value to 2 weeks, appointments can be scheduled up to 2 weeks in advance. If you don't use this option, **AccuSQL/AccuTrack** will allow appointments until the end of the semester without restrictions on how far in advance they can be scheduled.

Do not allow setting an appointment on the X day after X: Use these settings to specify the cut off time for scheduling a new appointment. For example, if you select "Same" and 6:00 AM, students will not be able to schedule appointments for the same day after 6 AM.

Do not allow canceling appointment on the X day after X: Use these settings to specify the cut off time for appointment cancellations. For example, if you select "Previous" and 12:00 AM, the ability for students to cancel appointments will end at 12:00 AM on the day before the appointment.

Default appointment type is Exclusive (1 on1): Use this option to indicate the default appointment type. If checked, the default appointment will be exclusive (1 tutor working with 1 student). If not checked, the default appointment type will be a group appointment.

Allow changing default appointment type: If you want students to be able to change the appointment type (from group to exclusive or vice-versa), check this box.

If you only do one type of appointments in your center, set the default appointment type to the allowed type and uncheck the "Allow changing default appointment type" box. For example, if you only do 1-on-1 appointments check the box "Default appointment type is Exclusive" and uncheck the box "Allow changing..." This will restrict the appointments to only the type you use.

Minimum and Maximum appointment duration: Use these boxes to set the minimum and maximum appointment duration. For example, the screen above shows that the minimum allowed appointment type is 30 minutes, and the maximum is 60 minutes.

If the duration of appointments at your center is fixed, set the minimum and maximum values to this fixed duration. For example, if all your appointments are always 30 minutes long, set the minimum and maximum appointment duration to 30.

In a group appointment, tutor can assist with different activities: If this option is checked,

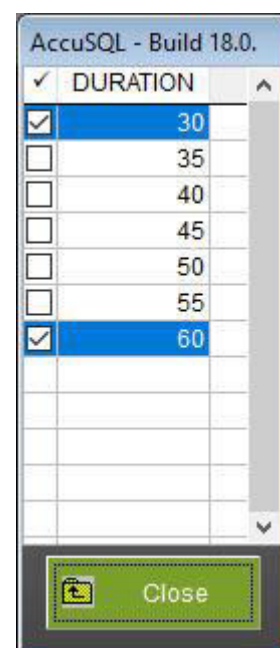
tutors will be able to help students with different classes during the same time slot. For example, a tutor who helps with Algebra and Calculus can meet with students from both these classes during the same time slot. If this option is not checked, then the tutor will only be able to provide assistance with a single class (the first class selected for that time slot) during the same time slot.

Max # of students in a group appointment: Use this option to specify the maximum number of students than can have an appointment with the same tutor during the same time slot. For example, if this value is set to 4, the tutor can meet with up to 4 students at the same time slot. This option would only apply if you allow for group appointments.

Apply these properties to: If one of these options is checked, the previous appointment restrictions will only apply to the selected option:

- Web Gateway users only.
- All users except admin.
- All users, and admin.

Allowable durations (within min-max duration) This setting determines the scheduling blocks that can be selected within the minimum and maximum appointment duration settings. Click the Modify button to select the blocks within the min/max.



Appointment start time increments also come into play here. So for example, let's say we are set to min 30, max 60, appointment start time increments of 30 and allowable duration of 30 and 60.

When a student, schedules the appointment via **AccuSQL/AccuTrack** or **Web Gateway** for that matter, the settings would be reflected as such:

- So the appointments start every 30 minutes and can be scheduled on the hour or on the half-hour for either 30 or 60 minutes (notice the Duration drop-down box).
- Now let's change the allowable duration to be 30, 45, and 60. In this case, the appointments are still allowed on the hour and half-hour but now a 15-minute duration is allowed.

Appointment start-time increment: Use this value to set the start time increment of each appointment. For example, if you set this value to 15, appointments can only start at one of the following times: Top of the hour, 15 minutes after the hour, 30 minutes after the hour, or 45 minutes

after the hour. **AccuSQL/AccuTrack** will enforce this value in the Appointments screen automatically via the auto cut-off features. For example, if you set this value to 15 and the user selects an appointment period that starts 10 minutes after the hour, **AccuSQL/AccuTrack** will automatically change this to 15 minutes after the hour.

Max weekly work hours per tutor: Use this spinner box to enter the maximum weekly appointment hours per tutor. Zero means no maximum is set. Any other value will set the maximum weekly hours. Once a tutor reaches this maximum, he or she will no longer appear in the appointment scheduling screen. In other words, the tutor will no longer be available for appointments that week.

Accept a visit as an appointment if sign-in time is within X minutes before or X minutes after the appointment's start time and the minimum sign-in period is X: This option controls how appointment's no-shows are calculated. The first two values define the appointment's sign-in window. If the student does not sign in during this window, he or she will be considered a no-show. For example, if the first value is 20 and the second value is 15 and the appointment's start time is 9:00, then the appointment window is 8:40 to 9:15. The third value defines the minimum sign-in period for the appointment. For example, if this value is 10, then the sign-in period must be at least 10 minutes.

Here's how **AccuSQL/AccuTrack** calculates the appointment's sign-in period for **no-show determination**:

- Sign-in Period = End Time - Start Time, where:
 - End Time = earlier of (sign-out time and appointment's scheduled end time)
 - Start Time = later of (actual sign-in time and the appointment's scheduled start time).

A student must be signed in for a period that includes some time of the actual appointment, else he/she will be considered a no-show. For example, if a student has an appointment from 9 AM to 10 AM and then signs in at 8:45 AM and then signs out at 8:59 AM, then the appointment will be a no show since the student signed out one minute before the appointment actually started.

Student must select appointment's activity to count as an appointment entry: If this option is checked, then the student must sign in to the appointment's activity to be considered as "Present" for the appointment. If this option is not checked, then a student can sign in to any class and still be considered as "Present" for the appointment (as long as the sign-in was during the appointment window).

Bypass Activities and Tutor Selection screens for appointment sign-ins: If this option is checked and the student is signing in during his or her appointment's window, **AccuSQL/AccuTrack** will sign the student into the appointment's activity and tutor automatically. For example, if the appointment is scheduled for Tutoring - College Algebra with Cindy Bright, **AccuSQL/AccuTrack** will automatically sign the student to this activity and tutor without asking the student to select them. Note: At sign in, the student will get a message indicating they are signing in for the appointment but he/she will not be required to select an activity or a tutor.

Email tutor with the appointment sign-ins (notify student is in): Check this box if you want **AccuSQL/AccuTrack** to automatically send an email message to the tutor when a student signs in for a scheduled appointment.

Assign Room for an appointment: If you want to schedule a room for appointments, make sure

this checkbox is checked. Rooms are set up in the System » Rooms screen. Note: Rooms are only assigned when an admin makes an appointment for the student.

Add a short note to the appointment made: Check this box if you want to add a note to a specific appointment. Notes are entered near the end of the appointment scheduling process by admins and students and are included in the email confirmations sent to students and/or tutors.

Auto select days in appt. wiz: If this box is checked, when users access the Appointment Wizard the day selection panel will appear with the days automatically selected. If you do not select this box the days will not be selected, then the student will pick the days they want from the list.

If the Appoint Wizard is behaving sluggishly, you may want to uncheck this box.

Use Appointment Wizard instead of Quick Scheduler for student's appointments: If checked, students will be presented with the Appointment Wizard when they click the Appointments button from the main sign-in screen and then schedule an appointment. If unchecked, then the students will use the Quick Scheduler to create the appointments.

EMAIL CONFIRMATIONS SETUP OPTIONS

Purpose: Allows you to configure your email confirmations that go out to **Students** and **Tutors** when an appointment is created.

Access: Click **View Appointments** in the **System Administration** screen and then the **Setup** tab in the bottom-right of the screen. Now click on **Email Confirmation Options** on the left-side **Options** menu to select it.

EMAIL CONFIRMATIONS OPTIONS

To access the Email Confirmations Setup options, click Set Appointments in System Administration, then the Setup tab in the bottom right of the screen. Now click on Email Confirmation Options on the left side of the Options menu to select it.

Show Appointment Confirmation Slip print-out box: Check this box if you want to print out an appointment confirmation slip after scheduling an appointment. The Appointment Confirmation will automatically print all the appointment information, but if you want you can customize it by adding your own text in the text area that will appear in the print-out. Also, if you choose, you can include any grant information in the print-out slip.

Email appointment confirmation to tutor: Check this box if you want to email an appointment confirmation message to the tutor when an appointment is scheduled or canceled. If you check this box, you can also check the box under it to send the new appointment as an Outlook calendar ICS file to the tutor.

Email appointment confirmation to student: Check this box if you want to email an appointment confirmation message to the student when an appointment is scheduled or canceled. If you check this box, you can also check the box under it to send the new appointment as an Outlook calendar ICS file to the student.

Templates (Setup for Appointment Email area):

Setup For Appointment Emails

Templates

- New Appointment - Student
- New Appointment - Tutor
- Cancelled Appointment - Student
- Cancelled Appointment - Tutor
- Rescheduled Appointment - Student
- Rescheduled Appointment - Tutor

Definitions for this template

- ☒ Send Emails in HTML format
- ☒ Use HTML template [Edit HTML format for this template](#)
- ☒ Include appointments for the next 2 weeks.

Message Subject: **Tutoring Appointment Notification**

CC to:

BCC to:

Signature: You have an appointment setup with a tutor/student. Your appointment time is listed above. Please report to room 301 on the 3rd floor of the Learning Resource Center at the scheduled time. You will need to arrive early and check in with the assistants in the hallway before you start your

Use this area to set up your appointment e-mails. You may send a new appointment confirmation, a canceled appointment confirmation, or a rescheduled appointment confirmation to students and/or tutors. Check the "Send Emails in HTML format" to send an email using HTML. If this box is not checked, emails will be sent in plain-text format.

Use the CC to and BCC to boxes to enter an email address if you would like a carbon copy or blind carbon copy of the confirmation and cancellation email messages.

If you do not select the Use HTML template checkbox, then you can enter your email text directly in the Signature text area. Important: The text in the area is placeholder text and should be replaced with your own message. The appointment information will automatically appear in the emails, but the signature area is where you can add the text that will appear below the appointment details generated by **AccuSQL/AccuTrack**.

After you have customized the message for your New Appointment – Student template, you can then click on New Appointment – Student and then use your down arrow key on the keyboard to select the next template, for example, New Appointment – Tutor. After modifying that template, you would then down arrow to the Cancelled Appointment – Student template and modify that, arrow down to the Cancelled Appointment – Tutor template, etc. until you have all of the templates the way you want them. If you choose to use HTML templates, you can check that box, and then click the Edit HTML format for this template button, you will be able to edit the templates in HTML.

+

Recipient Student

+

New Appointment(s)

+

Future Appointments

Font Times New Roman Small

B

I

U

Table

Add row

Add column

Add cell

Delete rows

Delete columns

Delete cells

Merge cells

Split cells

New Appointment(s) is/are set:

Appointment Date	From	To	Activity Id	Activit
%%Appointment Date%%	%%From%%	%%To%%	%%Activity Id%%	%%Activity%%
%%[Count]%% new appointment(s)				

Upcoming Appointments

Appointment Date	From	To	Activity Id	Activit
%%Appointment Date%%	%%From%%	%%To%%	%%Activity Id%%	%%Activity%%
%%[Count]%% appointment(s)				

Layout view Source view

Restore from default

Preview sample

Save

Done

The fields enclosed with 2 percentage characters are merge fields. That means they will merge the data from the appointment details, student, and tutor into the email when it is sent. At the bottom of the template, you should change the “canned” text for the email to reflect your own information.

On the left of the screen are various other merge fields you can add to the template. To do so, click the + sign to expand the desired tree element, and then click the checkbox next to the merge field you want to add to select it. Now click on the merge field and hold the left mouse and then drag it where you want it to appear in the template. In the following example next was added to indicate how the student can email the tutor and the Tutor Email merge field was added to the template:

AccuSQL HTML Template Editor

☐ Student Email
☐ Student Phone
☐ Set On
☐ Set By
☐ Set By Name
☐ Set From Web
☐ Notes
☐ [Count]
☐ Appointment Date
☐ From
☐ To
☐ Activity Id
☐ Activity
☐ Category
☐ Tutor
☐ Tutor Email
☐ Tutor Phone
☐ Room
☐ Location
☒ Future Appointments
☒ Future Appointment Members
☒ [Count]
☐ Student
☐ Student Email
☐ Student Phone
☐ Set On
☐ Set By
☐ Set By Name
☐ Set From Web
☐ Notes
☐ [Count]
☐ Appointment Date
☐ From
☐ To
☐ Activity Id

Font Times New Roman Small **B** *I* U

Table Add row Add column Add cell Delete rows Delete columns Delete cells Merge cells Split cells

Appointment Date	From	To	Activity Id	Activit
%%Appointment Date%%	%%From%%	%%To%%	%%Activity Id%%	%%Activity%%
%%[Count]%% appointment(s)				

If you need to contact the tutor directly, you can email him/her at: %%Tutor Email%%

You have an appointment setup with a tutor/student. Your appointment time is listed above. Please report to room 301 on the 3rd floor of the Learning Resource Center at the scheduled time. You will need to arrive early and check in with the assistants in the hallway before you start your tutoring session.

Please note that no shows are tracked and not showing up for your appointments may affect your ability to schedule future appointments.

If you need to cancel an appointment please call 555-345-6878 and talk to an assistant.

This email address is unmonitored, so please to not reply to it as your message will not reach anyone.

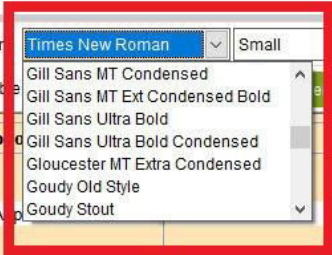
%%[Count]%% |

Layout view Source view

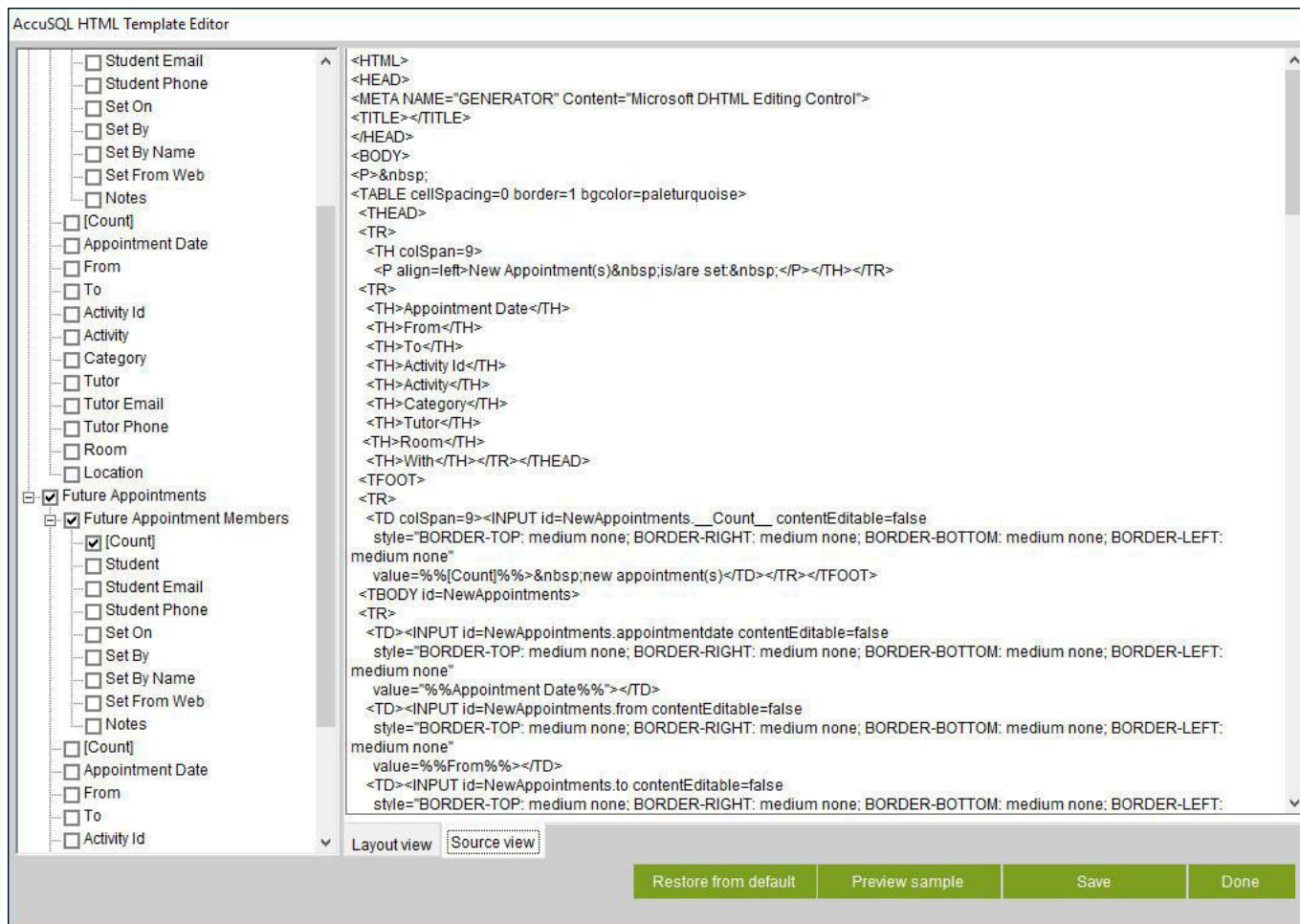
Restore from default Preview sample Save Done

After you are done editing the template, click the Save button to keep your changes. If you want to set the template back to its default settings, you can click the Restore from the default button.

If you want to change the font for the entire template click Ctrl and the a on the keyboard to select all, then click the drop-down font selector at the top of the editor and pick the new font.



Source view: If you click the Source View tab you can view the html for the template and edit it directly.



The DHTML is strictly interpreted here, so be careful or you make “break” the template and then have to Restore from default to fix it and start over. It is a good idea to press Ctrl+A on the keyboard to select all the source code and then CTRL+V to paste it into Notepad as you make changes so you do not lose what you have already worked on previously.

If you see a message that indicates a component is missing when you click the Edit HTML format for this template button, you do not have the Microsoft DHTML Editing Component installed on your computer. You can download the required [installer here](#). Unzip the file and then run the **DhtmlEd.msi** file to install it.

If you choose to edit the source view, then you must click the **Save** button first in that view directly. If you do not and go directly back to Layout view you will lose your changes to this section!

EMAIL REMINDERS OPTIONS

To access the **Email Reminders Options**, click **Set Appointments** in **System Administration**, then the **Setup** tab in the bottom-right of the screen. Now click on **Email Reminders Options** on the left-side menu to select it.

AccuSQL/AccuTrack has a special utility that can automatically send email reminders to students. Use this page to set up this utility. The top half is for controlling the appointment reminder emails, while the bottom half is for controlling the no-show notification emails.

APPOINTMENTS REMINDERS

You can setup **AccuSQL/AccuTrack** to automatically send an email message to students to remind them of their upcoming appointments.

To setup this feature, make sure that the “Send appointment reminder emails” checkbox is checked and enter the number of hours in advance to send reminder emails:

You can also change the email template of the text of the email reminder message. You can type in any text you like. For variables that depend on the appointment, use the following (do not leave blank spaces between opening and closing angle brackets):

- **<<StudentName>>**: This will be replaced by the student's name.
- **<<AppointmentInfoList>>**: This will be replaced by the appointment's date, from date-time to date-time, class, and tutor.
- **<<DateTimeGenerated>>**: This will be replaced by date and time appointment message is generated.

You also have the option of sending the appointment reminders via text messaging by clicking the **Send appointment reminder via Text Messaging** checkbox. For text messaging, you will need to set up the Nexmo messaging service in the **System Administration Communications » Setup » Text Messaging Configuration** screen. You also need to have a cell phone number entered for your students and tutors.

NO-SHOW NOTIFICATIONS

You can setup **AccuSQL/AccuTrack** to automatically email a message to students who miss their appointments. To set up this feature, make sure that the “Send no-show notification emails” checkbox is checked.

To change the text of the no-show message, use the message template. See above for a detailed explanation of using the template.

In **AccuSQL/AccuTrack**, the appointment reminders, automated imports, scheduled reports, and no-show notifications are run by a separate utility.

For **AccuSQL/AccuTrack 2018 and newer**, we use this guide to set up this automation:

[How to setup AccuTaskHandler KB](#)

OR

[AccuTaskHandler Setup Guide \(PDF\)](#)

For **AccuSQL/AccuTrack 2017 and older**, we use this guide to set up this automation: [Installing AccuTaskRunner \(PDF\)](#)

You can schedule the frequency of the emails via an option in the **System » Setup » System Options » Scheduled Tasks** screen.

RESTRICTIONS OPTIONS

How to access: System Administration > Set Appointments > Setup (bottom-right) > Restrictions Options

This page allows you to configure restrictions on appointments:

AccuSQL - Build 19.0.0

Close

Set Appointments Setup

Appointments Options

E-mail Confirmation Options

Email Reminders Options

Restrictions Options

Appointments Restrictions

☐ Only allow students to schedule appointments with tutors assigned to them in the Tutoring Requests screen

☐ Only allow registered students to schedule appointments

☐ Also allow scheduling appointments to global activities without registration

☒ Freeze new appointments if no-shows exceed: 5

☒ Freeze new appointments if cancellations exceed: 5

☐ Maximum number of appointments per day: 2

☐ Maximum number of appointments per week: 5

Lab: - Default -

Cancel Save

Only allow students to schedule appointments with tutors assigned to them in the Tutoring Requests screen: Check this option if you would like to allow scheduling appointments only to students who have tutoring request assignments. Use this option if you are using the Tutoring Requests and Assignment function of **AccuSQL/AccuTrack**, else leave this unchecked.

Only allow registered students to schedule appointments: Check this option if you want to restrict appointments only to students registered in the class. With this option selected, students not registered in a class will not be allowed to schedule appointments for that class.

Freeze new appointments if no shows exceed X: With this option you can freeze future appointments when a maximum number of no-shows is reached. The number of no-shows is counted from the beginning of the semester. You can set the maximum no-shows here by typing the number in the box.

You can over-write this restriction and void excused no-shows in the **View Appointments >> View No-Shows** screen.

Freeze new appointments if cancellations exceed X: You can set up **AccuSQL/AccuTrack** to freeze future appointments when a certain number of cancellations is reached. The number of cancellations is counted from the beginning of the semester. You can set the maximum cancellations here by typing the number in the box. Note: You can over-write this restriction and void excused cancellations in the View Appointments » View Cancellations screen.

Maximum number of appointments per day: Use this box to set the maximum number of appointments allowed per day per student.

Maximum number of appointments per week: Use this box to set the maximum number of appointments per week per student.

[Previous - VIEW APPOINTMENTS SCREEN](#) | [TABLE OF CONTENTS](#) | [Next - MEDIA CHECK-OUT](#)

From:

<http://www.attendance-tracking.com/docs/> - **Engineerica Documentation**

Permanent link:

<http://www.attendance-tracking.com/docs/doku.php/accutrack/fullmanual/view-appointments-options>

Last update: **2020/06/29 15:18**

