

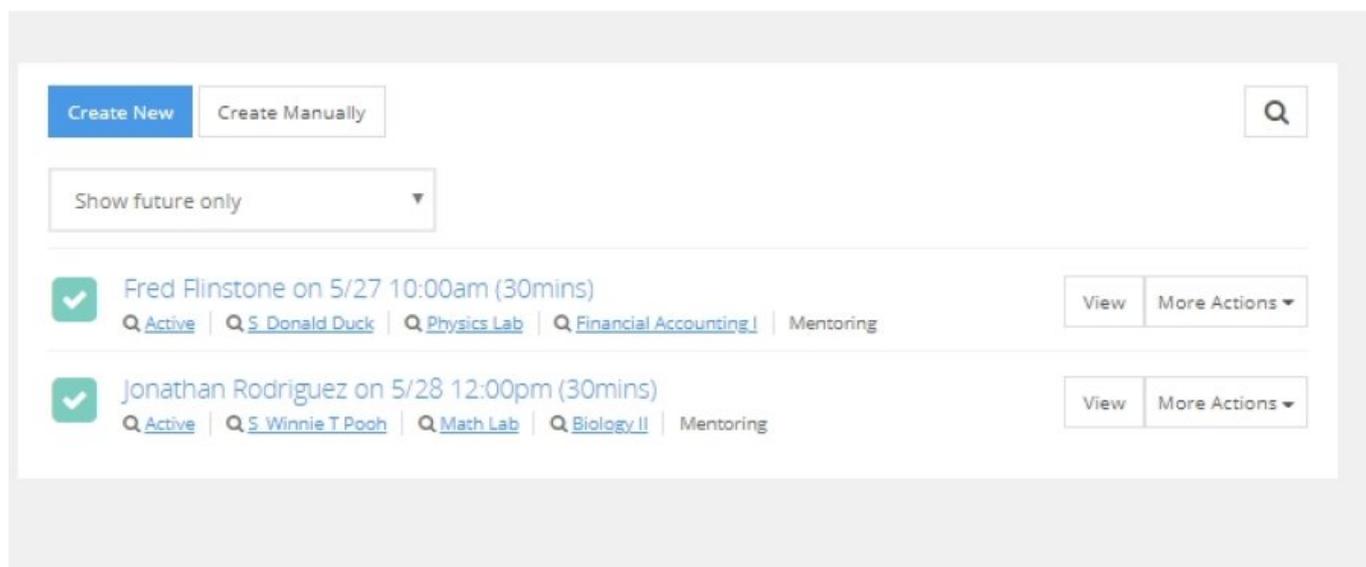


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Note: Please notice that your actual access to view/edit/delete information is set by your college administrator so you might see different options, contact your administrators if you feel you need more access or when in doubt.

View All (Appointment) Buttons

Appointments



ction there are several buttons that are useful when making **Appointments**:

- **Create New** - This option allows you to select **Service** or **Location** to create an appointment.
- **Create Manually** - This option allows you to select all the options manually to create an appointment.
- **Show list options**- Please select from a list of options:
- **Show All**- This option lists ALL appointments regardless of their Dates.
- **Show today's only**- This options lists Appointments for the Today (Current Date only).
- **Show happening right now only**- This option lists Appointments that are happening right now.
- **Show future only**- This option skips Past Appointments and shows only Appointments with a Start Date equals to the current Date and onwards.

- **Show past only**- This option skips Future Appointments and shows only Appointments with a Date equals to the current Date and before.
- **Show in custom date range**- This option allows you to pick a range, please type a Start Date and Time AND an End Date and Time to list the Appointments within that range.

Show in custom date range	▼	Start date	Start time	-	End date	End time	Apply Filters
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- **View Magnifying glass icon Option** - This option lets you view the appointments listed based on some options(see details below):

Filter Options (View Magnifying glass icon Option)

Filters

Search:

Everything

Search in:

Appointments

Refine your search:

Status

No-Show Status - All

Student - First Name

Student - Last Name

Attendee - Card #

Staff Member - First Name

Staff Member - Last Name

Staff Member - Card #

Location

Date - Start

Date - End

Course

Services

Apply Filters

- **Search** - This option allows us to search some known text in the system.
- **Search in** - This option allows you to filter the above mention search to a particular category.

Refine your search

- **Status** - Please select a **Status** to filter with.
- **Student First Name**- Please type in some text to search in the referenced field.
- **Student Last Name**- Please type in some text to search in the referenced field.
- **Attendee - Card #**- Please type in some text to search in the referenced field.
- **Staff Member First Name**- Please type in some text to search in the referenced field.
- **Staff Member Last Name**- Please type in some text to search in the referenced field.
- **Staff Member Card #**- Please type in some text to search in the referenced field.
- **Location**- Please type in some text to search in the referenced field.
- **Date Start**- Please type in a **Date Start** to search in the referenced field.
- **Date End**- Please type in a **Date End** to search in the referenced field.
- **Course**- Please type in some text to search in the referenced field.
- **Services**- Please type in some text to search in the referenced field.
- **Apply Filters** - Use this option to filter the list using all filters selected above.

View All (Appointment) Options

Appointments

The screenshot displays the 'Appointments' interface. At the top, there are buttons for 'Create New' and 'Create Manually', and a search icon. Below these is a dropdown menu set to 'Show future only'. The main area shows a list of three appointments for 'Albertina Aalders'. Each appointment entry includes a checkmark, the appointment details (date, time, duration), and a list of filters (e.g., Active, Heather Thrush, Peer Tutoring Center, CIRCUIT ANALYSIS II, Peer Tutoring). A context menu is open over the first appointment, showing options: View, More Actions (with a dropdown arrow), Cancel, Edit, Mark as No-Show, Mark as Show, Restore, and Void.

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ilable on this screen on each listed item.

- **Appointment Information/Title** - Click this title to edit or update the **Appointment** information.
- **View** - This simply allows you to see the appointment information.
- **More Options** - This gives you several options to modify the **Appointment** selected.
- **Cancel** - This gives you the option to **Cancel** the **Appointment** selected.
- **Mark as No-Show** - This gives you the option to mark the **Appointment** selected as a **No-show**.
- **Mark as Show** - This gives you the option to mark the **Appointment** selected as a **Show**.
- **Restore** - This gives you the option to **Restore** the canceled or voided **Appointment** selected.
- **Virtual Sign-in** - For online appointments only, this option allows to sign-in to an online appointment.
- **Void** - This gives you the option to **Void** the **Appointment** selected.

Appointments-Create Manually

Click in the “Create Manually” button to avoid the Appointment Wizard and select all the parameters on the same screen.

Some users need additional permissions to be able to perform this process, talk to your administrator if in doubt

Make Appointment

General information

Location	<input type="text" value="Type to search..."/>	<input type="button" value="Q"/>
Semester	<input type="text" value="202110 (Fall 2020)"/>	<input type="button" value="v"/>
	from 05/20/2019 to 12/31/2020	
Date	<input type="text"/>	<input type="text"/>
Duration	<input type="text" value="60"/>	<input type="text" value="mins."/>
Schedule as	<input type="text" value="Administrator"/>	<input type="button" value="v"/>
Student	<input type="text" value="Type to search..."/>	<input type="button" value="Q"/>
Staff Member	<input type="text" value="Type to search..."/>	<input type="button" value="Q"/>

Details

Service	<input type="text" value="Type to search..."/>	<input type="button" value="Q"/>
Course	<input type="text" value="Type to search..."/>	<input type="button" value="Q"/>
Notes	<input type="text"/>	

- **Location**- Use this option to select the appointment **Location**.
- **Semester**- Use this option to select the **Semester** information.
- **Date**- Use this option to select the appointment **Date**.
- **Duration**- Use this option to select the appointment **Duration**.
- **Schedule As**- Use this option to select the role of who is creating the appointment.
- **Student**- Use this option to select the Attendee.
- **Staff Member**- Use this option to select who will be meeting with the Attendee.
- **Service**- Select the **Service** associated with this appointment.
- **Course**- Select the Course associated with this appointment.
- **Notes**- Add Notes as needed in this appointment.
- **SAVE**- Select this option to try to save the appointment with the current parameters.
- **Search Available Slots**- Use this option to search available slots using all filters set above.
- **Cancel**- Use this option to cancel and rollback without saving.

Notice that depending on the parameters set the system might warn about some rules been broken, if this happens you will be able to read in red at the bottom of the page what happened and change the filters accordingly, you can also decide to break the rules (if you have the proper permissions to do this) but this is not recommended

This is an example of an exception that can show if you break some rules, as you can see in this case the STaff is not registered in the selected service(s), so in order to fix it you can go and link this Service with this STaff and then try again.

This appointment breaks the following rule(s)

- Staff is not registered in the selected service(s).

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