

ULM Tutoring Web Application - Support and Documentation

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01. Introduction - What the site offers and current features

The ULM Tutoring web application is designed to provide digital tutoring appointment capabilities to ULM students. Some of the features that this application currently offers include:

- Center/Schedule Creation
- Tutor Assignment to schedule
- Tutor Blackout Availability Management
- Schedule/Center Calendar
- Online Appointment setup (Microsoft Teams) using calendar
- Appointment rescheduling and canceling
- Appointment Report Generation
- Appointment reports emails to ULM faculties and professors
- Appointment reminder emails

02. Accessing the application

The tutoring application can be accessed at the URL: <https://ulmwebapps.ulm.edu/tutoring>

a. *Login:*

ULM students, and faculties can log-in to the application using their ULM username and password. Students are automatically assigned the student role on their first login. Faculties looking to use the system for tutoring can request a tutoring admin role to be assigned to them by putting a ticket with the ULM Web Development team. Tutoring Admin role allows the faculties to create and manage schedules in the system.

b. Roles

- i. **Student:** Students utilizing the system to create tutoring appointments. They will be able to view all the centers/schedules that are active in the system and create appointments. Usually students are the ones who will create appointments in the system.
- ii. **Tutors:** Can be a student or a faculty. Users with tutor roles are usually assigned as a tutor to one of the active schedules in the system.
- iii. **Tutoring Admin:** Faculty member(s) who are the admins for a schedule. They create and manage schedule(s), assign tutors to schedule(s), and oversee the overall schedule. They can create, edit, and delete appointments, if necessary.
- iv. **Schedule Editor:** Designed to allow tutors to be able to edit blackouts if needed. This role can be [added/removed](#) to the tutors from the View & Manage Tutors page.

A student user account is required to schedule an appointment. If a student hasn't logged in (and therefore doesn't have an account), tutors and tutoring admins can create a user account for the student using the '**Search/Add Student User**' link in the top navigation menu. [Once the account is created, the student will be visible in the dropdown menu when creating a new appointment.](#)

03. Home page

Based on your role in the system, your home page might look different.

- a. **Tutoring Admin:** Displays tabs to view and manage schedule(s) that they administer.

The screenshot displays the home page for a Tutoring Administrator. At the top, there is a dark red navigation bar with the text "Home" and "Add New Schedule". Below this, the main heading "Home" is centered. A horizontal menu contains two items: "Tutoring Administrator" (which is highlighted with a red underline) and "Generate Teams Meeting". A grey bar below the menu contains a dropdown arrow and the text "Administer Schedules". The main content area features two schedule cards. Each card has a title in blue, followed by "Open:" with a time range and days of the week, and "Dates:" with a date range. Below each card, there is a "VIEW:" section with a link to "Schedule" and statistics for "Appts", "Reports", "No-Shows", "Cancellations", and "Tutors". A "MANAGE:" section follows with links for "View schedule details", "Edit schedule", "View & manage tutors", and "Tutor Availability Management". At the bottom of each card, there are two icons: a document icon for "Duplicate Schedule" and a trash can icon for "Delete Schedule".

Home Add New Schedule

Home

Tutoring Administrator Generate Teams Meeting

▼ Administer Schedules

Write Place
Open: 07:30 am to 05:00 pm | Monday, Tuesday, Wednesday, Thursday, Friday
Dates: 2024-01-01 to 2024-08-01

VIEW: [Schedule](#) | Appts: 1 | Reports: 0 | No-Shows: 0 | Cancellations: 0 | Tutors: 2
MANAGE: [View schedule details](#) | [Edit schedule](#) | [View & manage tutors](#) | [Tutor Availability Management](#)

[Duplicate Schedule](#) | [Delete Schedule](#)

Write Place Fall 24
Open: 07:30 am to 05:00 pm | Monday, Tuesday, Wednesday, Thursday, Friday
Dates: 2024-01-01 to 2024-06-19

VIEW: [Schedule](#) | Appts: 0 | Reports: 0 | No-Shows: 0 | Cancellations: 0 | Tutors: 0
MANAGE: [View schedule details](#) | [Edit schedule](#) | [View & manage tutors](#) | [Tutor Availability Management](#)

[Duplicate Schedule](#) | [Delete Schedule](#)

b. Student:

- i. Available centers:** A list of all active schedules in the system. Selecting a schedule provides a link to its calendar.
- ii. Upcoming appointments:** Any scheduled appointments that they have in the system currently. Appointment details such as center name, appointment date and time, tutor, instructor, course are provided for easier access. A meeting link is also provided that allows the student to join the online meeting using Microsoft Teams (opens in a new tab).
- iii. Help Link:** Information provided to students in case they encounter any issues with the schedule or accessing the meeting. This comes from the [help field in the schedule settings](#).

Home

▼ Schedule New Appointment

Select a center:

▼ Upcoming Appointments as a Student

Write Place

- *Repeats every week on Wednesday from 2024-07-17 to 2024-08-01 at 10:00 am until 11:00 am*
- Meeting Type: Online
- Tutor: [REDACTED]
- Student: [REDACTED]
- Course: Test
- Instructor: Test
- Working On: Test data.
- File Attachments:
 - [REDACTED]

[JOIN MEETING](#)

▶ Need help?

c. Tutor

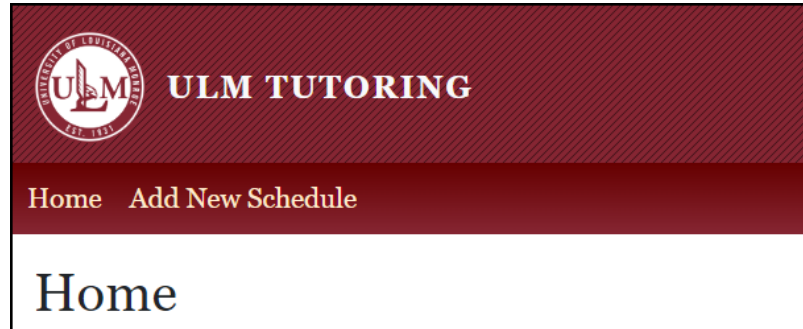
- i. Tutor schedules:** Displays a list of all schedules that you have been assigned as a tutor. A link to access the calendar for the schedule is also provided.
- ii. Upcoming appointments:** Any scheduled appointments that you have in the system currently as a tutor. Appointment details are provided for easier access.
- iii. Manage my availability:** Link to manage your schedule blackout availability. [See Blackout Availability for help.](#)
- iv. View all appointment reports for students:** Tutors can also access all appointment reports of a student for the schedule. This includes appointment reports from other tutors in the schedule as well.

The screenshot displays a web interface with the following elements:

- Home** header
- Navigation tabs: **Tutor** (selected) and **Student**
- ▼ Tutor Schedules** section containing a link: **Write Place | View Calendar | Manage my blackout availability**
- ▼ Upcoming Appointments as a Tutor** section containing a detailed appointment card for **Write Place**:
 - Monday, July 22, 2024 | 08:00 am to 09:00 am**
 - Meeting Type: Online
 - Tutor: [Redacted]
 - Student: [Redacted]
 - Course: Test Course
 - Instructor: Test
 - Working On: Research paper review
 - File Attachments: No files attached.
 - JOIN MEETING** button
 - Search: **View all Write Place appointment reports for this student ([Redacted])**
 - ▶ ? Need help?** link

04. Schedule/Center Management

- a. **Create a new Schedule:** ULM faculty/staff with ‘tutoring admin’ role in the system are able to create and manage schedules. To create a new schedule, click on the ‘Add New Schedule’ button on the top navigation bar.



- i. **Create/Edit schedule form:** The form allows the tutoring admin to set the details for the schedule. Here are some of the fields in the form that might require extra explanation:
 1. **Schedule Increments:** This field defines the scheduling periods and appointment starting and ending times available on your schedule. The default value is 30 minutes, which displays the schedule calendar in 30 minute time-blocks from start time to end time.
 2. **Closed Days:** The days of the week where the schedule/center is closed and appointments cannot be made. These days are not visible on the schedule calendar.
 3. **Schedule admins:** Select any user who will be a tutoring admin for this schedule. If the ULM faculty you want to add is not available in the list, click on the “Search & Manage Tutoring Admin Users” link at the top of the field to add them to the system.
 4. **Limits:** These allow setting time and number based restrictions on appointments for students and tutors.
 - a. **Limit Scheduling Availability:** How late can an appointment be made? This option allows you to prevent last-minute appointments. The default value is ‘2 hours before start time’.
 - b. **Max appts/week & Max appts/day:** Maximum number of appointments that a student can make per week or day in the schedule. The default value is “No” (no limit is placed).
 - c. **Restrict Appt. Changes:** If set, students will be unable to cancel or modify their appointments within the specified number of minutes before their appointment's starting time. The default value is set to “No”, which allows the student to cancel or modify their appointments at any time.

- 5. Email settings and templates:** These fields define the settings for emails that the system sends when a student makes, modifies, or cancels an appointment, or when a student is reminded of their appointment. Each email type can be enabled or disabled individually. If disabled, no email for that action will be sent. Email subject and body are pre-filled with default text. They can be replaced with the content of your choice. Several tokens are available that will fill information dynamically in the email. All available tokens and their descriptions can be viewed by clicking on the help link that is included with the field.

▼ Appointment Confirmation Email








Enable Appointment Confirmation Email

[? Click here to see the list of available tokens/placeholders that you can use in your email subject and body](#)

Appointment Confirmation Email Subject

[center_name]: Appointment created successfully!

Appointment Confirmation Email Template

B *I*      Paragraph   Source

Dear [user_name],

An appointment on [appointment_date] between [start_time] and [end_time] has been created.

Appointment Details:

[appointment_details]

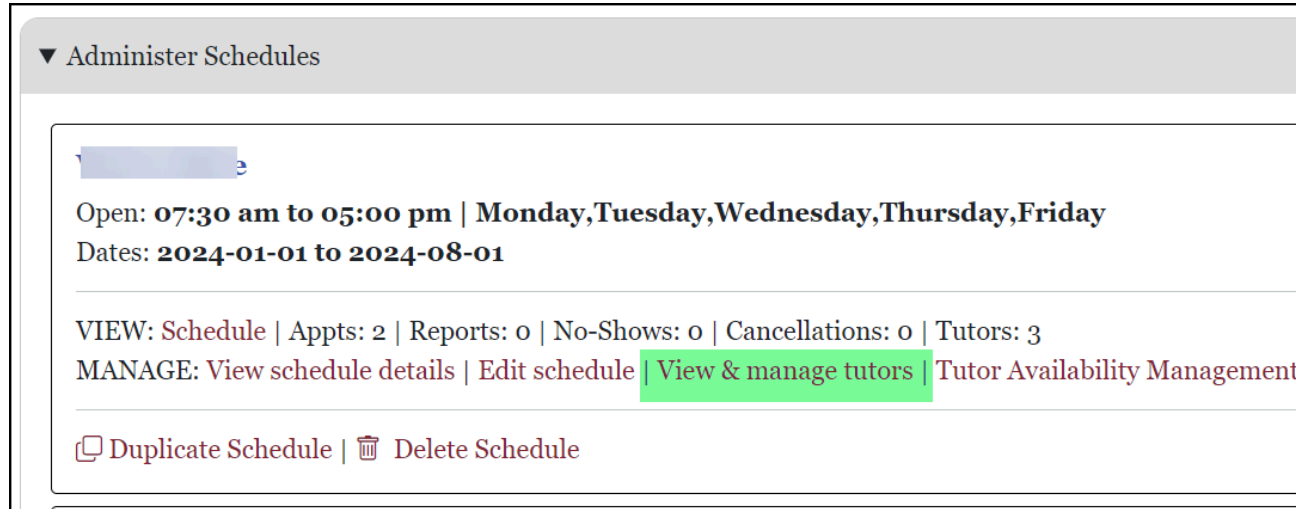
You can make, cancel, or modify appointments by logging into the scheduling system at [tutoring_app_url].

- 6. Help info:** Help information about the schedule, such as the contact information for the students to contact if there are any issues with the meeting. This information will be [displayed on the student's home page](#).

05. Tutors

Tutors are usually ULM students, but ULM faculty and staff can also be added as a tutor in the system. To assign a tutor to your schedule, the user should have a tutor role assigned in the system.

- a. To view all tutors assigned to your schedule, click on the ‘View & Manage Tutors’ link for your schedule



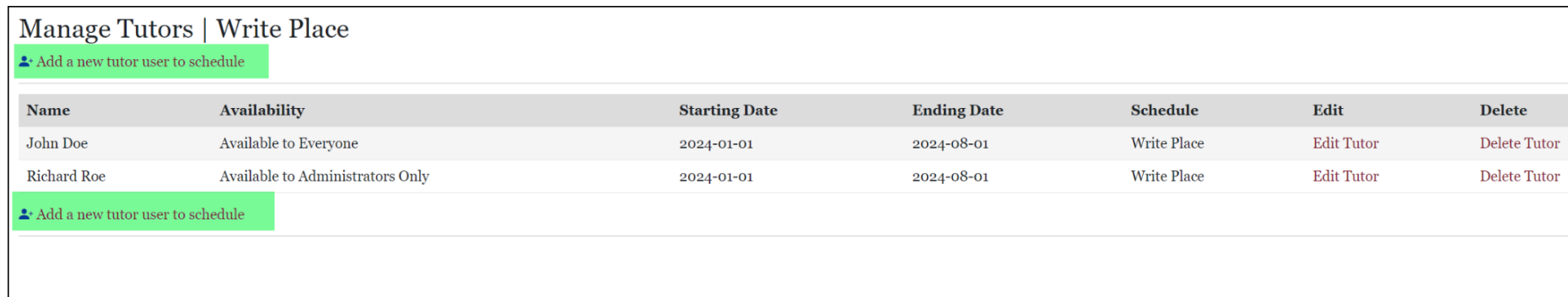
▼ Administer Schedules

Open: **07:30 am to 05:00 pm** | **Monday, Tuesday, Wednesday, Thursday, Friday**
Dates: **2024-01-01 to 2024-08-01**

VIEW: [Schedule](#) | Appts: 2 | Reports: 0 | No-Shows: 0 | Cancellations: 0 | Tutors: 3
MANAGE: [View schedule details](#) | [Edit schedule](#) | **[View & manage tutors](#)** | [Tutor Availability Management](#)

[Duplicate Schedule](#) | [Delete Schedule](#)

- b. The resulting page will display all the tutors that are assigned to your schedule currently. If the tutor you wish to add is not listed here, click on the ‘Add a new tutor user to schedule’ button (green highlight in the screenshot below) to get a list of all the users that have the role of ‘tutor’ in the system.



Manage Tutors | Write Place

[Add a new tutor user to schedule](#)

Name	Availability	Starting Date	Ending Date	Schedule	Edit	Delete
John Doe	Available to Everyone	2024-01-01	2024-08-01	Write Place	Edit Tutor	Delete Tutor
Richard Roe	Available to Administrators Only	2024-01-01	2024-08-01	Write Place	Edit Tutor	Delete Tutor

[Add a new tutor user to schedule](#)

- c. The resulting page will display all the users that have been assigned the tutor role in the system. You can search the list by the tutor's first name, last name, or email. If a tutor user is listed here, you can assign the user to your schedule by clicking the link 'Assign user to schedule' (shown with 1 in the screenshot below).

If the tutor you are searching for is NOT found, it could be due to either their user account not existing in the system or their user account not being assigned the tutor role. To create new tutor user accounts or assign a tutor role to a user account, click on the link 'Manage Tutor User Accounts' at the top info banner (green highlight in the screenshot below).

Add Tutor to Schedule | Write Place

? This page displays all users that have tutor role in the system. You can search for the user using their name, or email in the fields below.

If a matching tutor is not found, it could be due to either their user account not existing in the system or their user account not being assigned the tutor role. You can create new tutor user accounts or assign a tutor role to a user account from here: [Manage Tutor User Accounts](#)

Email First Name Last Name

[Apply](#)

First Name	Last Name	Campus-wide ID (CWID)	Username	Email	Action
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]@warhawks.ulm.edu	Assign user to schedule Write Place 1

- d. If you click on the 'Manage Tutor User Accounts' link in the page mentioned above, a search form is provided, where you can search for ULM users (both faculty and students). Each result will include a link that allows you to create a user account for them (if they do not have a user account in the system) or assign tutor role (if they already have a user account in the system). This is shown with the green-highlight in the screenshot below. Once the user account has been created and assigned the tutor role, you can now go back to the page from step above and assign the user to your schedule. Please note that clicking on 'Create tutor user' will not only create a user account, but also assigns the tutor role to the created account.

Search/Manage Tutor User Account

Name or CWID or Email:

[Search](#)

Name	Email Address	Type	Major	Classification	Department	Title	Action
[redacted]	[redacted]@warhawks.ulm.edu	St	COSC	Sr			Create tutor user
[redacted]	[redacted]@warhawks.ulm.edu	St	COSC	Jr			Add tutor role to user account
[redacted]	[redacted]@warhawks.ulm.edu	St	COSC	Fr			Create tutor user

- e. Clicking on the ‘Assign user to schedule’ link from step #c above will open a new form which contains various settings for the tutor being assigned to your schedule. Some of the fields/settings are explained below:
- i. **Availability:** By default, a tutor is AVAILABLE TO EVERYONE, which means that the tutor is visible in the schedule calendar and anyone can make an appointment with the tutor. If this option is set to AVAILABLE TO ADMINISTRATORS ONLY, then only tutoring admins for the schedule will be able to see the tutor in the calendar and make an appointment with the tutor.
 - ii. **Start and End dates:** Starting and ending date for the tutor for the schedule. Defaults to the start date and end date of the schedule.
 - iii. **Bio:** Information about the tutor that can help students know about the tutor, such as their qualifications, specializations and what they can help with. This information will be visible to the students in the [schedule calendar](#). This is an optional field.
 - iv. **Email Settings:** Email address of the tutor user. This will be pre-filled by default. The ‘Send Appointment Messages?’ checkbox can be unchecked if the tutor does not wish to receive any appointment related emails (confirmation, cancelation, rescheduling, and reminder). This option is checked by default, and we recommend the tutors to check this option.
 - v. **Limits:** The minimum and maximum length for the appointments that can be created with this tutor. The default is 30 mins to 1 hour.
 1. **Example:** If a tutor wishes to set their appointment limit as 1 hour 15 mins (min) to 2 hours (max), you will need to set MINIMUM APPOINTMENT LENGTH - MINUTES to 15 mins, MINIMUM APPOINTMENT LENGTH - HOURS to 1 hours, MAXIMUM APPOINTMENT LENGTH - MINUTES to none, and MAXIMUM APPOINTMENT LENGTH - HOURS to 2 hours.

Sample screenshot of this form is provided below:

Assign Tutor [redacted] | Write Place

Staff / Resource Details *


Staff or Resource Name *

[redacted] l

Availability *

Available to Everyone

Starting Date

01/01/2024 

Ending Date

08/01/2024 

Schedule *

Write Place

Staff / Resource Bio or Related Information

B *I*      Paragraph    Source

Email-Specific Options *

Email Address *

[redacted]@warhawks.ulm.edu

Send Appointment Messages?

If this checkbox is checked, appointment confirmation message will be cc'd

Minimum Appointment Length

Minimum Appointment Length - Minutes

30 minutes

Minimum Appointment Length - Hours

- None -

Maximum Appointment Length

Maximum Appointment Length - Minutes

- None -

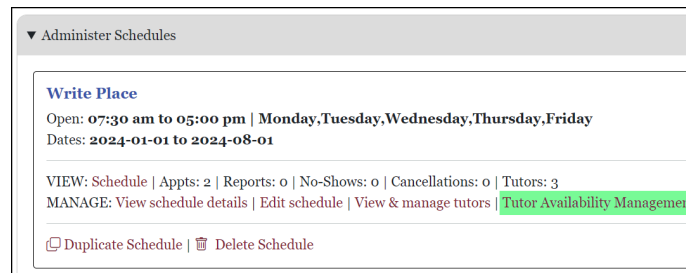
Maximum Appointment Length - Hours

1 hour

06. Tutor Schedule Blackout Availability

The tutoring system uses a weekly availability calendar to display the tutor's availability. Blackouts are any time-blocks during which the tutor is NOT available. After assigning a tutor to your schedule, they will not be visible in the schedule calendar immediately. All assigned tutors need a blackout availability created for them, which sets the blackout for the tutor.

- a. **Blackout Availability Management:** To create a blackout availability for your tutor, click on the 'Tutor Availability Management' link for your schedule. This link will display all the assigned tutors for your schedule and links to set their blackout availability.



- b. The resulting page has several columns. The link in the 'status' (1 in the screenshot below) column shows whether an automated scheduling (creating blackout availability) is available for a tutor.

Manage schedule tutor blackout availability Write Place			
Tutor Name	Status ¹	Add ²	Reset ³
I [redacted]	Automated scheduling is available	Add Blackout Availability	No blackout availability record found
John Doe	Automated scheduling is not available [?]		Reset tutor's blackout availability
Richard Roe	Automated scheduling is available for days after 2024-07-20	Add Blackout Availability	Reset tutor's blackout availability

- i. If a tutor does NOT have a blackout availability created (usually the case for newly assigned tutors), blackout availability can be added by clicking on the link 'Add Blackout Availability' from the 'Add' column.
- ii. If a tutor already has blackout availability that runs until the end of the schedule's end date, new blackout availability cannot be created and the status will display 'Automated scheduling is not available'.
- iii. If a tutor has blackout availability but it doesn't run until the end of the schedule, blackout availability can be added for the tutor after the currently set blackout availability end date.

- c. **Adding Staff Blackout Availability:** Clicking on the ‘Add Blackout Availability’ link for a tutor opens a new form that displays the weekly availability for the tutor. By default, all days are selected, which means the blackout is present for all times (tutor is not available on any time-blocks). *Uncheck the blocks where the tutor will be available for tutoring.*
- i. **Start and End date:** This is the start date and end date for the blackout availability (#1 in the screenshot below). By default, the FROM date is set to TODAY’s date, and the TO date is set to the [tutor’s end date for the schedule](#).
 - ii. **Time-blocks:** The rows for the table display the schedule time-blocks from the schedule’s start time to the end time based on the set [schedule increments](#). The screenshot below shows a schedule that uses 30 mins increments.
 - iii. **Days:** The columns for the table show all days of the week where the schedule is set to be open. This is determined based on the [closed days set for the schedule](#).

Add Tutor Blackout Availability Form

The chart below shows a week of I [redacted]’s availability. *Uncheck the blocks where I [redacted] is available for appointment.*

Create a schedule that runs From: To: 1

Add Tutor Blackout Availability | *Uncheck the blocks where I [redacted] is available for appointment.*

Time 2	<input checked="" type="checkbox"/> Monday 3	<input checked="" type="checkbox"/> Tuesday	<input checked="" type="checkbox"/> Wednesday	<input checked="" type="checkbox"/> Thursday	<input checked="" type="checkbox"/> Friday
07:30 am - 08:00 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
08:00 am - 08:30 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
08:30 am - 09:00 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
09:00 am - 09:30 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
09:30 am - 10:00 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10:00 am - 10:30 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10:30 am - 11:00 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11:00 am - 11:30 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11:30 am - 12:00 pm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12:00 pm - 12:30 pm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12:30 pm - 01:00 pm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

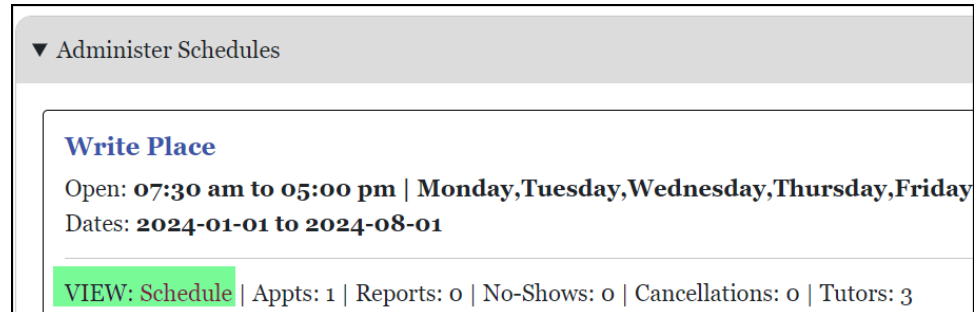
Once this form is submitted, the tutor’s blackout availability is set and the tutor will now be visible in the schedule calendar.

07. Schedule Calendar

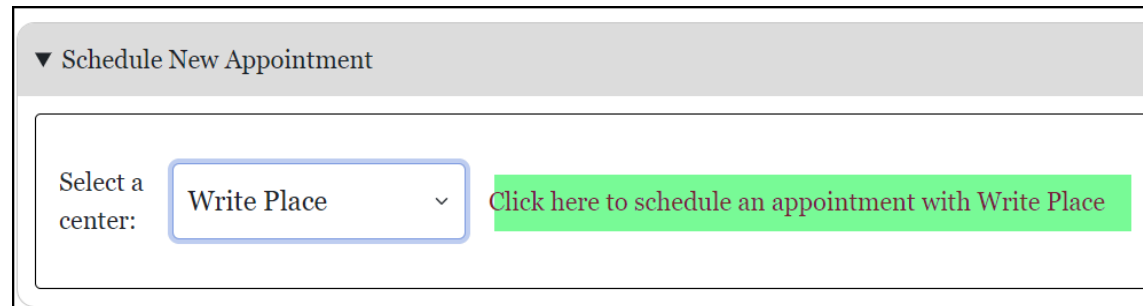
The schedule calendar displays all tutors for the schedule (if their blackout availability is set), and allows the students to make an appointment with them. The calendar runs from the schedule's start date to end date.

a. Accessing Calendar

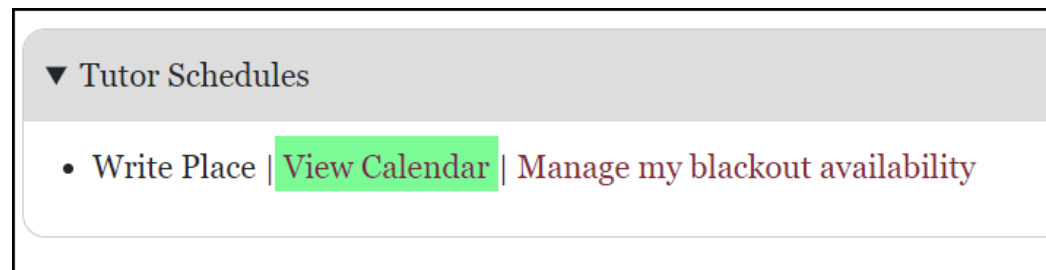
- i. **Tutoring Admin:** Tutoring admins can access the calendar by using the ‘View:Schedule’ link in their home page.



- ii. **Student:** Students can choose an available schedule from the dropdown list, which will generate a link to view the calendar for the schedule.







- iii. **Tutor:** Tutors assigned to a schedule will be able to see a list of all their assigned centers and a link to view the calendar for each schedule.



b. Calendar Overview:






Schedule Appointment | Write Place

Calendar Legend:

 Tutor blackout (Tutor is unavailable)
  Past time-block
  Available time-block
  Your scheduled appointment
  Other existing appointment

[Previous Week](#) | [Current Week](#) | [Next Week](#) | 

July 18, 2024 - July 24, 2024

Jul. 18: Thursday	07:30 am	08:00 am	08:30 am	09:00 am	09:30 am	10:00 am	10:30 am	11:00 am	11:30 am	12:00 pm	12:30 pm	01:00 pm	01:30 pm	02:00 pm	02:30 pm	03:00 pm	03:30 pm	04:00 pm	04:30 pm
John Doe 																			
Richard Roe  																			
Jul. 19: Friday	07:30 am	08:00 am	08:30 am	09:00 am	09:30 am	10:00 am	10:30 am	11:00 am	11:30 am	12:00 pm	12:30 pm	01:00 pm	01:30 pm	02:00 pm	02:30 pm	03:00 pm	03:30 pm	04:00 pm	04:30 pm
John Doe 																			
Richard Roe  																			

i. Tutor icons:

- Bio:** The [bio information from the tutor's settings page](#) will be displayed when hovered.
- Admin only:** This icon means that the tutor is visible only to the tutoring admin. Students will not be able to see or schedule appointments with this tutor. This setting comes from the [tutor's setting page](#).

- ii. **Navigating Calendar:** Buttons are provided at the top of the calendar to switch between weeks. By default, the calendar starts with the CURRENT DATE at the top and displays the upcoming week-days. The [designated closed days for the schedule](#) are not displayed in the calendar.
- iii. **Open Blocks:** Open blocks are designated by white colored blocks in the calendar. These are the time-blocks where the tutor is available for appointments and there are no existing appointments. These blocks can be clicked to open the appointment setup form.
- iv. **Blackouts:** Blackouts are designated by navy-blue colored blocks in the calendar. These are the time-blocks where the tutor is unavailable for appointments. Students are not able to click on these blocks. Tutoring admins are able to click on the blocks to view the blackout details, edit blackouts, cancel blackouts.
- v. **Appointment Blocks:**
 - 1. **My appointments:** Students and tutors can see their appointments designated by an orange colored block in the calendar. The block can be clicked to view appointment details, and perform additional actions such as rescheduling, editing, generating appointment reports (if tutor), etc.
 - 2. **Other existing appointments:** Students and tutors will see other appointments (appointments that are NOT theirs) as diagonally grayed out blocks in the calendar. These blocks cannot be clicked and are meant to display that an appointment exists in the time-block.

PLEASE NOTE: Tutoring admins will see all appointments as an orange colored block and can click on them.
- vi. **Past Time Blocks:** Time blocks in the past are disabled for students and tutors. They will be displayed as a gray block and are not clickable. Tutoring admins are able to click on the past time slots to create appointments, if necessary.
- vii. **Schedule Holiday/Closure Blocks:** These are the time blocks that are set as a closure/holiday for the schedule by the schedule admin. Holiday/Closure can be of two types:
 - 1. **Full Day Closure/Holiday:** The schedule is closed for the entire day. No appointments can be scheduled for this day.
 - 2. **Partial Closure/Holiday:** The schedule is closed for a specific period of time. E.g. 9:20 am to 11:30 am. Scheduling an appointment is possible if the schedule has an open time block.

Details on creating and managing schedule holidays/closures can be found [here](#).

Example Student/Tutor Calendar View: In the screenshot below, **1 - Open time-block;** **2- Tutor Blackout;** **3 - Past time-blocks;** **4 - Their appointment;** **5 - Other appointment;**

Jul. 18: Thursday	07:30 am	08:00 am	08:30 am	09:00 am	09:30 am	10:00 am	10:30 am	11:00 am	11:30 am	12:00 pm	12:30 pm	01:00 pm	01:30 pm	02:00 pm	02:30 pm	03:00 pm	03:30 pm	04:00 pm	04:30 pm
John Doe ⓘ																			
██████████ ⓘ																			

Example Student/Tutor Calendar View: In the screenshots below, **1 - Partial Closure/Holiday;** **2- Full Day Closure/Holiday**

Mar. 28: Friday	07:30 am	07:45 am	08:00 am	08:15 am	08:30 am	08:45 am	09:00 am	09:15 am	09:30 am	09:45 am	10:00 am	10:15 am	10:30 am	10:45 am	11:00 am	11:15 am	11:30 am	11:45 am
John Doe ⓘ 👤	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
██████████ Tutor ⓘ																		

Apr. 18: Friday	07:30 am	07:45 am	08:00 am	08:15 am	08:30 am	08:45 am	09:00 am	09:15 am	09:30 am	09:45 am	10:00 am	10:15 am	10:30 am	10:45 am	11:00 am	11:15 am	11:30 am	11:45 am	12:00 pm	12:15 pm	12:30 pm	12:45 pm	01:00 pm	01:15 pm	01:30 pm	01:45 pm	
<div style="display: flex; justify-content: space-between; align-items: center;"> 2 🗓 Spring Break </div>																											

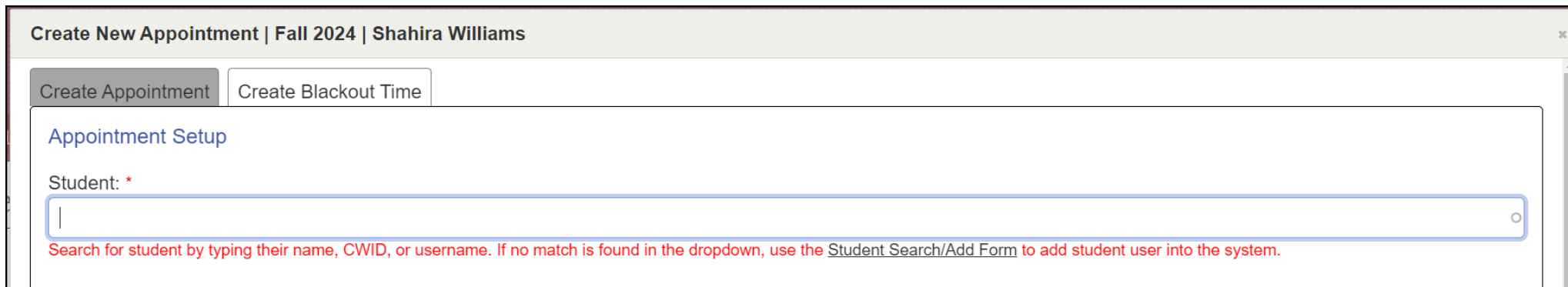
08. Creating Appointments

To create an appointment, navigate to the desired week and click on the open time-block with your desired tutor. The appointment setup form will be displayed in a pop-up.

a. Appointment Setup Form Overview:

The appointment setup form is divided into 4 sections:

- i. **Appointment Setup:** This section includes appointment time, repeating/one-time appointment, student for the appointment.



The screenshot shows a web interface for creating a new appointment. The title bar reads "Create New Appointment | Fall 2024 | Shahira Williams". Below the title bar are two tabs: "Create Appointment" (selected) and "Create Blackout Time". The main content area is titled "Appointment Setup" and contains a "Student: *" label followed by a search input field. Below the input field is a red error message: "Search for student by typing their name, CWID, or username. If no match is found in the dropdown, use the [Student Search/Add Form](#) to add student user into the system."

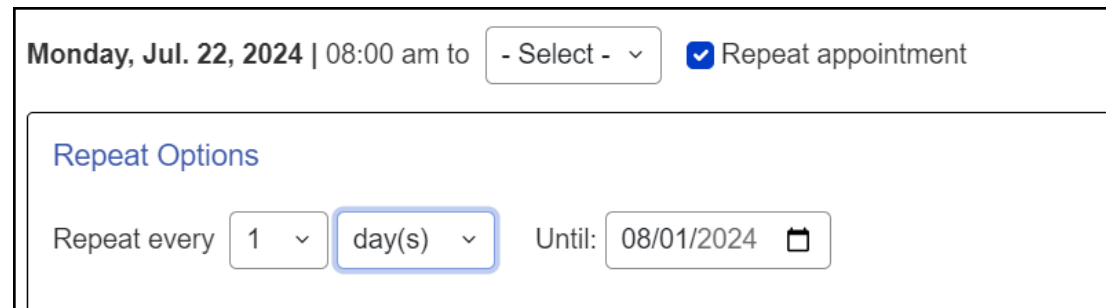
1. **Student:** If the user is a student attempting to set up an appointment, the student field will be pre-filled with their information and disabled. Tutoring admins can search for students using their username, CWID, or name and select the desired student from the dropdown. **If a student user is not present in the system, they will not be visible in the dropdown.** However, tutors and tutoring admins can add student users to the system using the 'Student Search/Add Form' link. Once added, they will be listed in the dropdown for selection.
2. **Appointment Time:** **The appointment start time is set based on the clicked time-block.** The appointment end time can be selected using the dropdown. The appointment limit message displays the [time limit for the selected tutor](#).

3. **Repeating Appointments:** By default, the appointment is a one-time non-repeating appointment. If you wish to set up a repeating appointment, click on the ‘Repeat appointment’ checkbox. This opens a new set of fields related to repeating appointments.

a. **Repeat Frequency:** This determines the repeating frequency. The default value is 1.

b. **Repeat Type:** This determines the type of recurrence (weekly or daily). The available options are ‘DAY(S)’ & ‘WEEK(S)’. The default value is set to DAY(s).

i. **Daily:** The appointment simply repeats from the start date to the end date (Until) every X day(s). The value of X will be the selected repeat frequency.

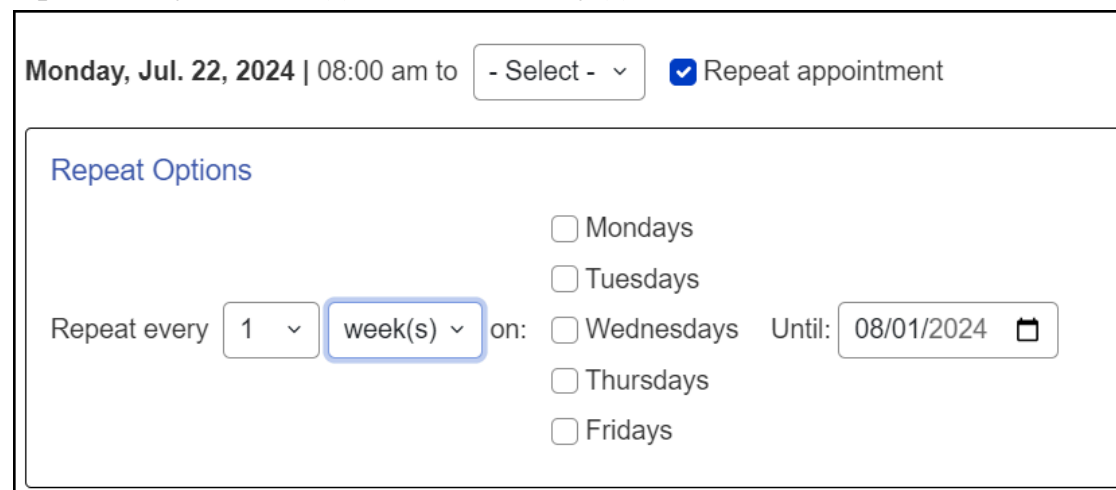


Monday, Jul. 22, 2024 | 08:00 am to - Select - ▾ Repeat appointment

Repeat Options

Repeat every 1 ▾ day(s) ▾ Until: 08/01/2024 📅

ii. **Weekly:** If the ‘week(s)’ option is selected for frequency, an extra field is displayed that allows the user to choose the weekday(s) in which the appointment will occur. The appointment will repeat every X week(s) on selected day(s). The value of X will be the selected repeat frequency.



Monday, Jul. 22, 2024 | 08:00 am to - Select - ▾ Repeat appointment

Repeat Options

Repeat every 1 ▾ week(s) ▾ on: Mondays Tuesdays Wednesdays Thursdays Fridays

Until: 08/01/2024 📅

c. **Repeat End Date (Until):** The end date for the repeating appointment.

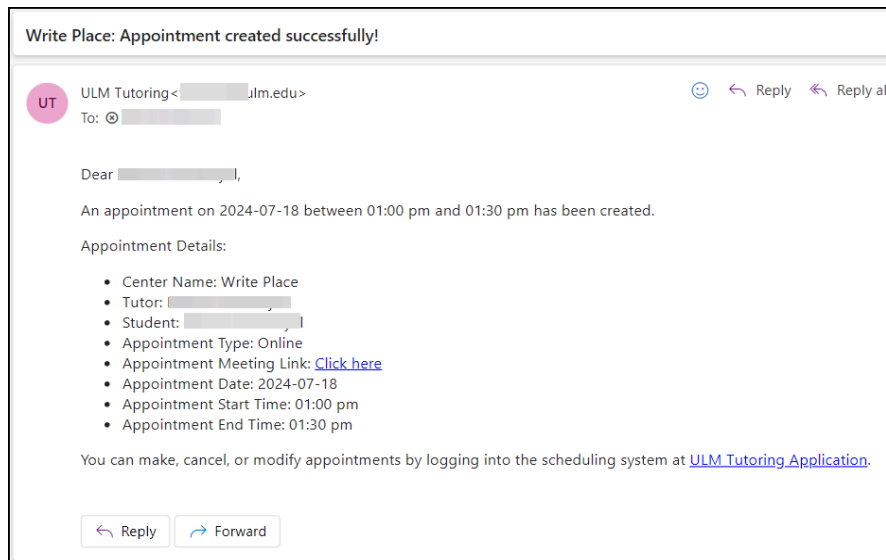
- ii. **Appointment Type:** This section sets the type of appointment (Online or In-person). **Currently, only tutors and tutoring admins can create in-person appointments.** All appointments created by a student are set up as an online appointment. For online appointment, a Microsoft Teams link will be generated to access the meeting.
- iii. **Appointment Details:** This section allows the user to set the details related to the appointment such as the course for the tutoring, instructor of the course, if the instructor needs to be notified of the tutoring appointment, the topic they require tutoring on, etc.

The screenshot shows a web form titled "Create New Appointment | Admin Test Schedule | | al". The main heading is "Appointment Details". Below the heading, it says "Questions marked with a * are required." The form contains the following fields and options:

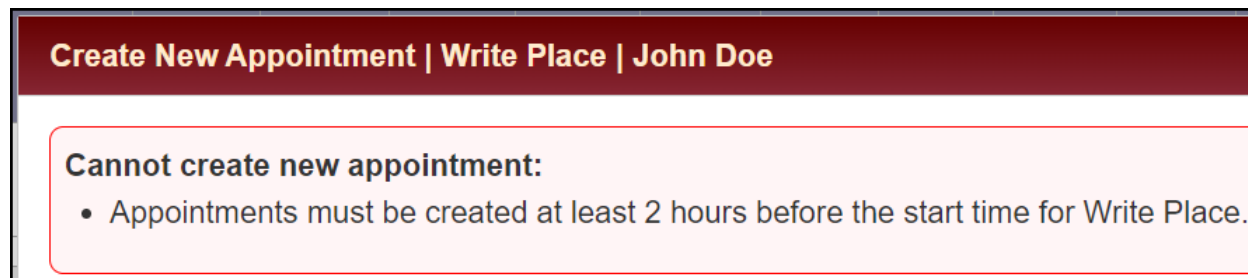
- Course: *** A text input field. Below it, a red note says: "If you're seeking help with writing that is not associated with a course, write 'NA'".
- Send proof of meeting to instructor?**
- Search Instructor: ? *** A search input field. Below it, a red note says: "Search for instructor by typing their first or last name (e.g. John / Doe) or course name (e.g. ENGL1001). Select from the list if your instructor/course appears in the search result."
- What would you like to work on today? *** A large text area for notes.
- Anything else your tutor should know? (Optional)** Another large text area for notes.

- iv. **File Attachments:** This section allows the user to attach upto 3 files. Please note that the file attachment section will only be visible if the schedule/center allows file attachments. This is set on the [schedule's settings page](#).

- b. Conflict Checks:** When the appointment setup form is filled and submitted, the following happens:
- i.** Conflict checks are performed to make sure that:
 1. Selected appointment length is within the tutor's set limits.
 2. Selected appointment date and time(s) do not conflict with the tutor's schedule (other existing appointments and their blackouts). If a conflict is found, an error message is displayed, which displays the dates of conflict.
 - ii.** An email notification with the details of the appointment is sent to the student and the tutor ([if tutor's appointment email notification is enabled](#)). The email content will be created using the [email template from the schedule setting](#).



- iii.** A text log is created and stored within the appointment. This log will be updated every time a new action is taken with this appointment (e.g., rescheduling, canceling, tutor marking appt as no-show, generating appointment report)
- c. NOTE: Appointment creation limits** - For schedules that have a [limit set on how late an appointment can be created](#), or the [maximum appointments per day or per week](#), the student will see an error message if those limits are detected. These limit checks do not affect tutoring admins.



09. View Appointment Details

To view the details of your created appointment, click on the appointment in the calendar.

- a. **Meeting Link:** A button will be provided to access the online meeting (Microsoft Teams).
- b. **Attached Files:** Displays any files attached to the appointment. Tutors and Tutoring admins are provided with links to email the file to the student or delete it.
- c. **Admin/Tutor Actions:** This section is only visible to tutors and tutoring admins. This provides a way to mark the appointment as a 'No-Show' or to generate a new appointment report.
- d. **Action Buttons:** Additional buttons are provided at the bottom of the pop-up to attach files (only if the schedule allows file attachment and the file limit is not reached), [reschedule/edit the appointment](#), or [cancel the appointment](#).

The screenshot shows a pop-up window titled "Existing Appointment | Write Place | John Doe". The window is divided into several sections:

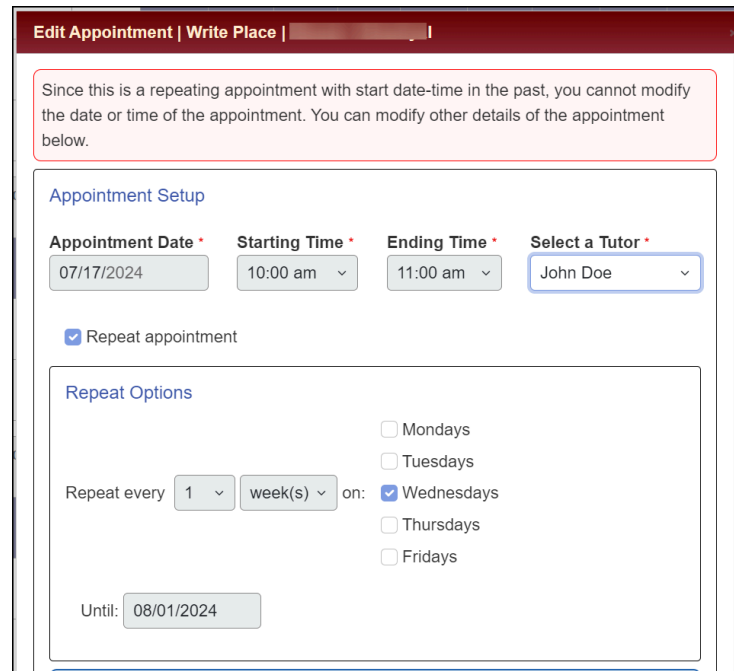
- Appointment Summary:** Displays the date and time: "Wednesday, July 24, 2024 | 10:00 am to 11:00 am". Below this, it states: "Repeats every week on Wednesday from 2024-07-17 to 2024-08-01 at 10:00 am until 11:00 am".
- Online Section:** Contains the text: "If you choose an online appointment, log back in to this website approximately five to ten minutes before the start of your appointment. Then, open this appointment and click 'Start or Join Online Consultation.'" Below this text is a red button labeled "Start or Join Online Consultation".
- Appointment Details:** Lists various fields:
 - Course:** Test
 - Instructor:** Test
 - Send proof of meeting to instructor?:** Yes
 - Instructor Email:** [redacted]@ulm.edu
 - What would you like to work on today?:** Test data.
 - Anything else your tutor should know? (Optional):** Optional test info.
- Attached File(s):** Shows a list of files with a single entry: "[redacted].pdf - 2024-07-17 01:29:06 pm by Administrator Administrator | [Email File to Student](#) | [Delete File](#)".
- Admin / Tutor Actions:** A red-shaded section containing two buttons: "Add Appointment Report" and "Mark as No-Show".

At the bottom of the window, there are four buttons: "Attach File", "Edit Appointment", "Cancel Appointment", and "Close".

10. Rescheduling/Editing an Appointment

Clicking on the ‘Reschedule Appointment’ or ‘Edit Appointment’ button opens the form to edit an appointment. This form will look very similar to the [appointment setup form](#), and all the fields in the form will be pre-filled with the information from the set appointment. Update any fields you wish to update, and click on ‘Update Appointment’ button to edit the appointment.

- a. **Updating appointment date/time:** Future appointments (both one-time or repeating) allow changing their appointment date, time. *However, in case of repeating appointments with some occurrence(s) in the past, changing the appointment date & time is NOT allowed.* In such cases, appointment date time fields will be disabled (see screenshot below). Other details, such as meeting info can be updated.



The screenshot shows a web form titled "Edit Appointment | Write Place | [redacted] |". At the top, a red-bordered box contains the following text: "Since this is a repeating appointment with start date-time in the past, you cannot modify the date or time of the appointment. You can modify other details of the appointment below." Below this is the "Appointment Setup" section with four fields: "Appointment Date" (07/17/2024), "Starting Time" (10:00 am), "Ending Time" (11:00 am), and "Select a Tutor" (John Doe). A checkbox labeled "Repeat appointment" is checked. The "Repeat Options" section includes a "Repeat every" field set to "1" week(s), and a list of days: "Mondays", "Tuesdays", "Wednesdays" (checked), "Thursdays", and "Fridays". An "Until" field is set to "08/01/2024".

- b. **Changing Tutor:** If you need to switch your appointment with another tutor, select a new tutor from the ‘Select a Tutor’ dropdown and save the appointment.
- c. An email notification with the details of the updated appointment is sent to the student and the tutor ([if tutor’s appointment email notification is enabled](#)). The email content will be created using the [email template from the schedule setting](#).
- d. Appointment Rescheduling/Editing Limits: For schedules that have a [limit set on how late an appointment can be updated](#), the student will see an error message if those limits are detected. These limit checks do not affect tutoring admins.
- e. [The text log for the appointment](#) will be updated to add an entry about the appointment modification.

11. Canceling an Appointment

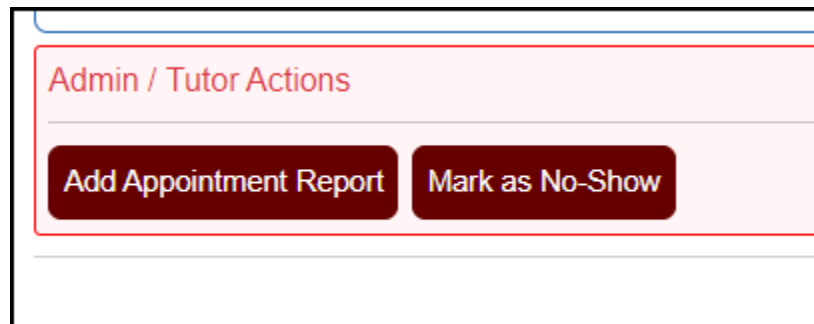
To cancel an existing appointment, click on the ‘Cancel Appointment’ button in the [appointment detail pop-up](#). For schedules that have a [limit set on how late an appointment can be updated or canceled](#), the student will see an error message if those limits are detected. These limit checks do not affect tutoring admins.

- a. **Repeating Appointments:** All appointments will be marked as canceled and no longer be visible in the calendar.
- b. **Email Notification:** An email notification about the appointment cancellation is sent to the student and the tutor ([if tutor’s appointment email notification is enabled](#)). The email content will be created using the [email template from the schedule setting](#).
- c. [The text log for the appointment](#) will be updated to add an entry about the appointment cancellation.

12. Marking Appointment as No-Show

Tutors and tutoring admins can mark their appointments as a No-Show. Click on the [‘Mark as No-Show’ button](#) in the appointment detail pop-up for an appointment.

- a. **One-time (non-repeating) appointments:** The appointment will be marked as no-show and no longer be visible in the calendar.
- b. **For Repeating appointments:** Specific recurrence(s) (instances) can be marked as no-shows. Only those instances will be removed from the calendar.
- c. [The text log for the appointment](#) will be updated to add an entry about this action.



13. Appointment Reports

Appointment reports are **only available to tutors and tutoring admins and are filled out by a tutor** after meeting with the student. This report is typically used to record the details of what was worked on during a given meeting. Some professors might require a report of a tutoring appointment. This report can be emailed to the instructor as a proof of the meeting. Appointment reports are usually one-per appointment, but multiple appointment reports can be created for repeating appointments (for each occurrence). To add an appointment report, click on the 'Add Appointment Report' button in the appointment detail.

a. Adding Appointment Report: The appointment report form can be divided into several sections:

- i. **Appointment Report Details:** This section contains the field to add details related to the appointment such as actual meeting length, areas worked on, etc.
 1. **Areas worked on:** This is a checklist of items that allows the tutor to select any options that best describes what areas were covered or worked on during the appointment. The selected options are included in the appointment report email that is sent.

Identify the areas you and the student worked on *

- Reading and understanding the assignment
- Doing research
- Generating ideas
- Articulating a thesis/argument, focus, purpose of writing
- Developing ideas and supporting points
- Using evidence to support ideas and points

2. **Appointment Note:** This note is optional and will only be sent to the tutors and the tutoring admins of the schedule.

Appointment Notes

This note will be sent only to the tutor and the schedule admins.

- ii. **Email Options:** This section provides you different options to email the appointment report. The student option is selected by default. Other options include appointment tutor, tutoring admins for the schedule, and also a text box to enter comma separated list of emails.

Email Options

Email the appointment report form to the **Student** **Tutor** **Schedule Admin(s)** and/or

Other Email Addresses (each separated with a comma).

- iii. **File Attachment:** This section allows you to attach a file about the meeting to the appointment report. This file will also be included in the appointment report email.
- b. [The text log for the appointment](#) will be updated to add an entry about this action.

Sample Appointment Report Email:

From: ULM Tutoring <[redacted]@ulm.edu>
Sent: 25 September 2024 08:38
To: [redacted]@warhawks.ulm.edu>
Subject: ULM Tutoring - Appointment Report - [redacted] - Write Place

This is an appointment report sent from the ULM Tutoring application for student [redacted] ([redacted]@warhawks.ulm.edu) from Write Place. Please find the details below:

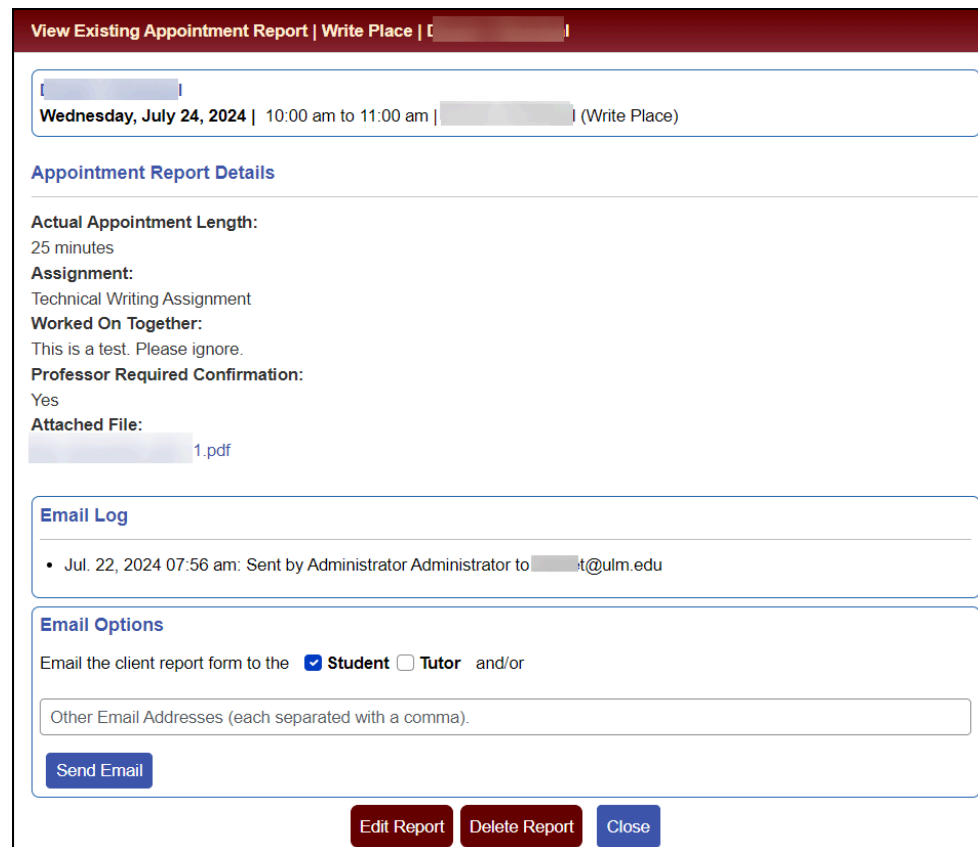
- Student: [redacted]@warhawks.ulm.edu)
- Course: test course
- Tutor: John Doe
- Appointment Date: 2024-09-18
- Appointment Length: Testing Again
- Assignment: Testing Assignment
- Areas Worked On:
 - Reading and understanding the assignment
 - Articulating a thesis/argument, focus, purpose of writing
 - Using evidence to support ideas and points
 - Tone and register
 - Vocabulary and diction (word choice)
 - Citations (including in-text citations and references)

14. Viewing Appointment Reports

To view appointment reports, click on the appointment to view the appointment details. If an appointment report is present for the appointment, tutors and tutoring admins can see a ‘View Existing Report’ button in the ‘Admin / Tutor Actions’ section. For repeating appointments, an additional button called ‘View All Existing Reports’ will be displayed that allows the user to view all appointment reports created for the appointment.



Clicking on the ‘View Existing Report’ button will display the current details of the appointment report, attached files, email log, form to email the report, and action buttons to edit or delete the report.



The image shows a window titled 'View Existing Appointment Report | Write Place | [redacted]'. The window content is as follows:

- A header bar with the text: Wednesday, July 24, 2024 | 10:00 am to 11:00 am | [redacted] (Write Place)
- A section titled 'Appointment Report Details' containing:
 - Actual Appointment Length:** 25 minutes
 - Assignment:** Technical Writing Assignment
 - Worked On Together:** This is a test. Please ignore.
 - Professor Required Confirmation:** Yes
 - Attached File:** [redacted].pdf
- An 'Email Log' section with one entry: Jul. 22, 2024 07:56 am: Sent by Administrator Administrator to [redacted]@ulm.edu
- An 'Email Options' section with:
 - Radio buttons for 'Student' (checked) and 'Tutor'.
 - A text input field for 'Other Email Addresses (each separated with a comma)'.
 - A 'Send Email' button.
- At the bottom, three buttons: 'Edit Report', 'Delete Report', and 'Close'.

15. Schedule/Center Reports/Data

- a. This is only available to the tutoring admins.
- b. The tutoring admin home page displays all schedules that they administer. Each schedule will display data related to the schedule:

Write Place

Open: **07:30 am to 05:00 pm | Monday, Tuesday, Wednesday, Thursday, Friday**

Dates: **2024-01-01 to 2024-08-01**

VIEW: [Schedule](#) | Appts: 4 | Reports: 2 | No-Shows: 0 | Cancellations: 0 | Tutors: 3

MANAGE: [View schedule details](#) | [Edit schedule](#) | [View & manage tutors](#) | [Tutor Availability Management](#)

[📄 Duplicate Schedule](#) | [🗑 Delete Schedule](#)

- i. **Appts:** Total number of appointments scheduled in the schedule. This does not include canceled appointments.
- ii. **Reports:** Total number of appointment reports generated for the appointments in the schedule.
- iii. **No-Shows:** Total number of appointments that have been marked as No-Show by the tutor. For repeating appointments, [since an instance of the appointment can be marked as a no-show](#), the count for such No-Shows will be displayed in parentheses next to the no-show number.
- iv. **Cancellation:** Total number of appointments that have been canceled in the schedule.
- v. **Tutors:** Total number of tutors that have been assigned to the schedule.

16. Resetting Tutor's Blackout Availability

Tutoring admins can reset their tutor's schedule blackout availability by clicking on the ['Tutor Availability Management' link for their schedule](#). On the blackout availability management page, a reset link will be provided ([see screenshot here](#)) that allows the availability to be reset. The reset can be of two types:

a. Partial reset (CAUTION)

Reset Blackout Availability | [redacted]

Reset from date *

07/22/2024

3

The reset date has to be today (default) or a future date.

⚠ CAUTION ⚠

You have requested to reset the schedule blackout availability for tutor [redacted] / starting from 2024-07-22. If you continue, the following future appointments will be affected:

- Future Appointments that will be deleted: 2
- Repeating Appointments that will be updated to remove future recurrences: 1

Are you sure you want to continue?

Reset Blackout Availability from Jul.22, 2024

⚠ Reset All Blackout Availability

Close

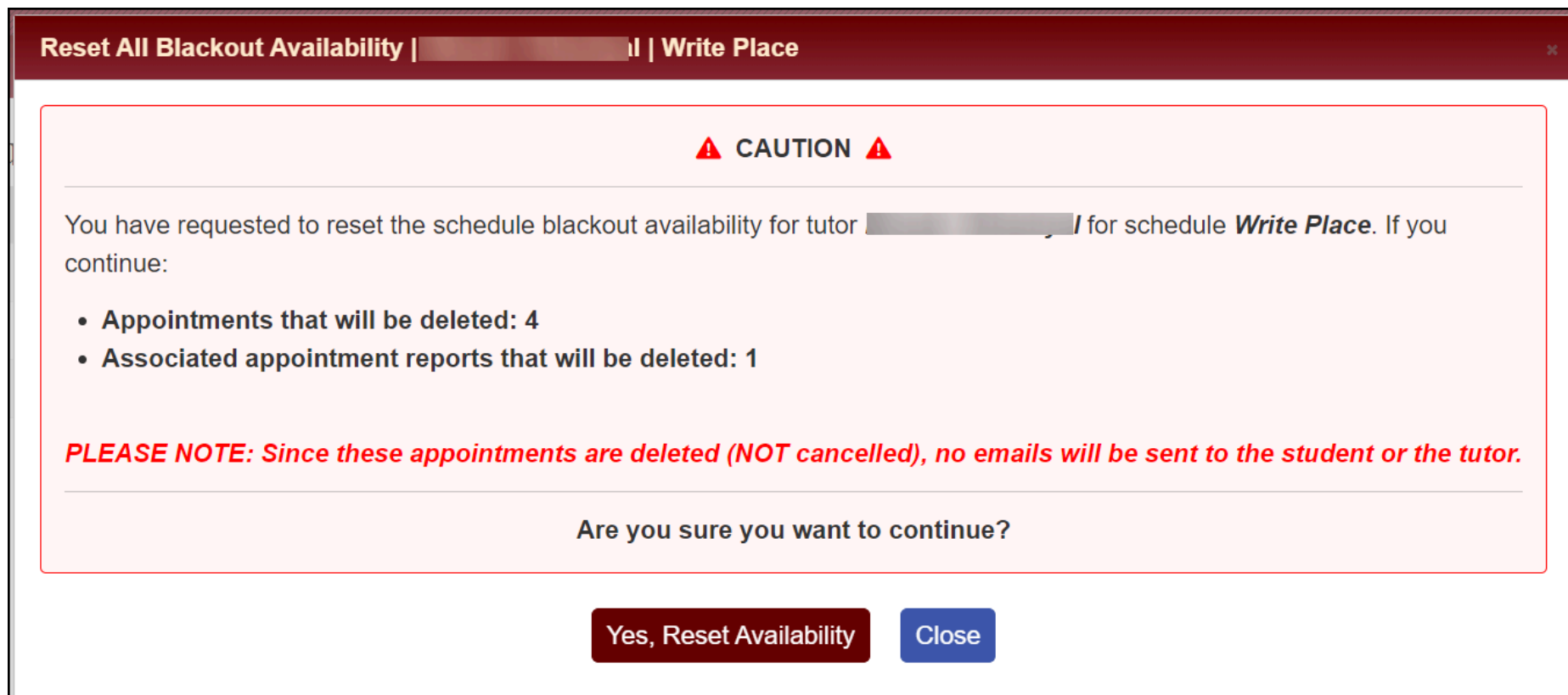
1

2

- i. **This resets the tutor's availability starting from today or any future date.** The reset date defaults to current date, but it can be selected by the user (#3 in the screenshot above).
- ii. **Any future appointments (based on the selected reset date) will be deleted from the schedule, and no cancellation email is sent to the student or tutor.**
 1. If there are repeating appointments in the future with some past-occurrences, the appointment won't be deleted. Rather, **all future occurrences (from the selected reset date) will be removed from the appointment.** No cancellation email is sent to the student or the tutor of affected appointments.

b. Complete reset (CAUTION)

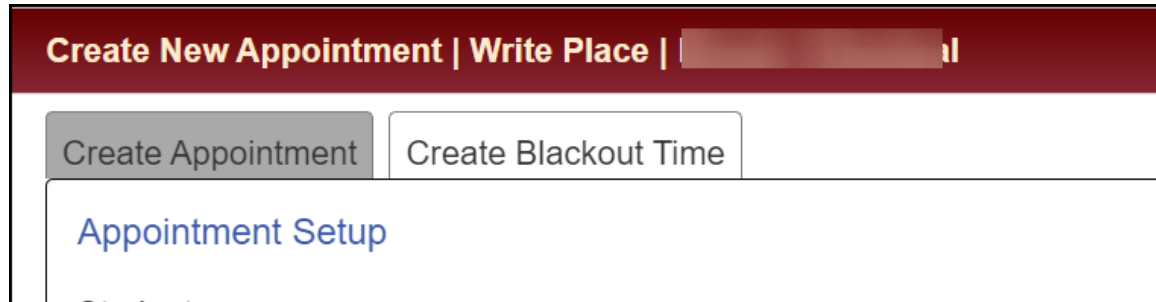
- i. To perform a complete reset of the tutor's blackout availability, click on the 'Reset All Blackout Availability' in the partial reset form (#2 in the screenshot above).
- ii. This reset deletes the tutor's blackout availability, and also deletes any appointments that the tutor has for the schedule. No cancellation email is sent to the student or the tutor of deleted appointments.
 1. PLEASE NOTE: Since appointment reports are associated with appointments, any associated appointment reports are also deleted from the system.



17. Creating Tutor blackouts from the calendar

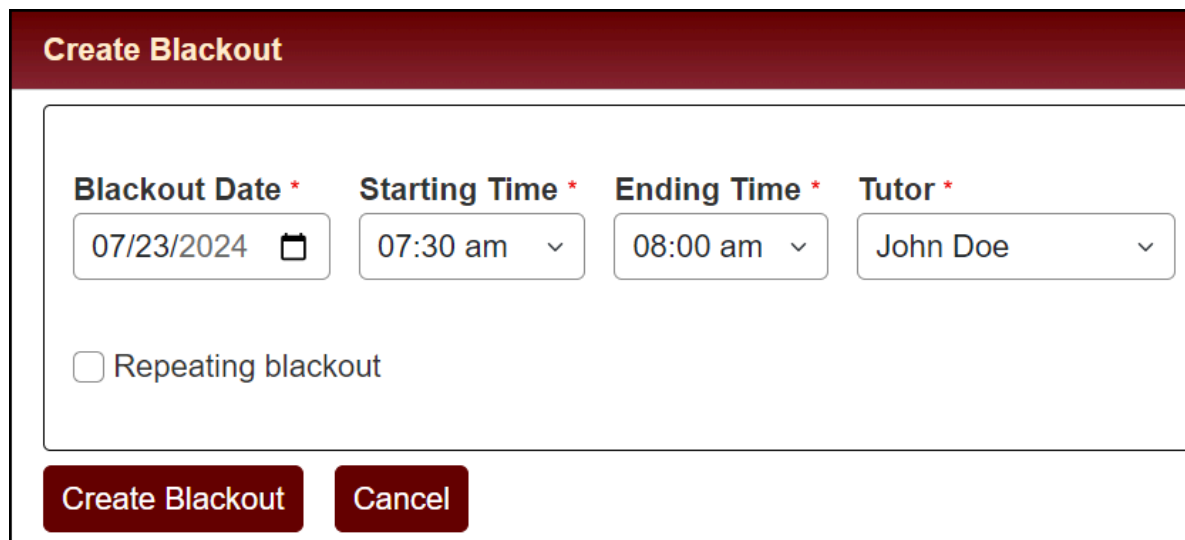
Tutoring Admins and tutors with ‘Schedule Editor’ role can create a tutor blackout from the calendar as well.

- a. On the schedule calendar, click on any open time-block.
- b. This should display the appointment setup form by default. However, tutoring admins can also see a ‘Create Blackout Time’ tab at the top.



The screenshot shows a web interface with a dark red header bar containing the text "Create New Appointment | Write Place | [redacted] |". Below the header, there are two tabs: "Create Appointment" (which is highlighted in grey) and "Create Blackout Time". Below the tabs, the text "Appointment Setup" is displayed in blue.

- c. Clicking on the ‘Create Blackout Time’ tab opens a new form that allows the tutoring admin to select the date-time details for the blackout. The blackout is a non-repeating blackout by default, but checking the ‘Repeating Blackout’ checkbox allows the user to create repeating blackouts. The fields for repeating blackouts are [similar to the ones in ‘Create a new appointment’ form](#).



The screenshot shows a form titled "Create Blackout" with a dark red header. The form contains the following fields:

- Blackout Date ***: A date input field showing "07/23/2024" with a calendar icon.
- Starting Time ***: A time input field showing "07:30 am" with a dropdown arrow.
- Ending Time ***: A time input field showing "08:00 am" with a dropdown arrow.
- Tutor ***: A dropdown menu showing "John Doe" with a dropdown arrow.

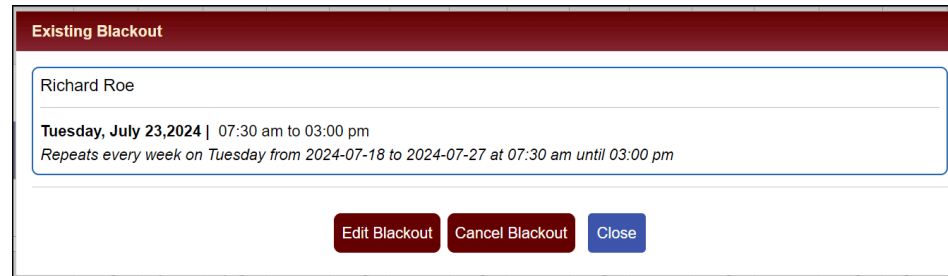
Below these fields is a checkbox labeled "Repeating blackout" which is currently unchecked. At the bottom of the form are two buttons: "Create Blackout" (in a dark red box) and "Cancel" (in a white box with a dark red border).

- d. A conflict check happens when the ‘Create Blackout’ button is clicked. This checks for any conflicts with the tutor’s schedule (current blackouts or existing appointments).

18. Editing or canceling tutor blackouts from the calendar

Tutoring admins can edit and cancel existing blackouts using the schedule calendar.

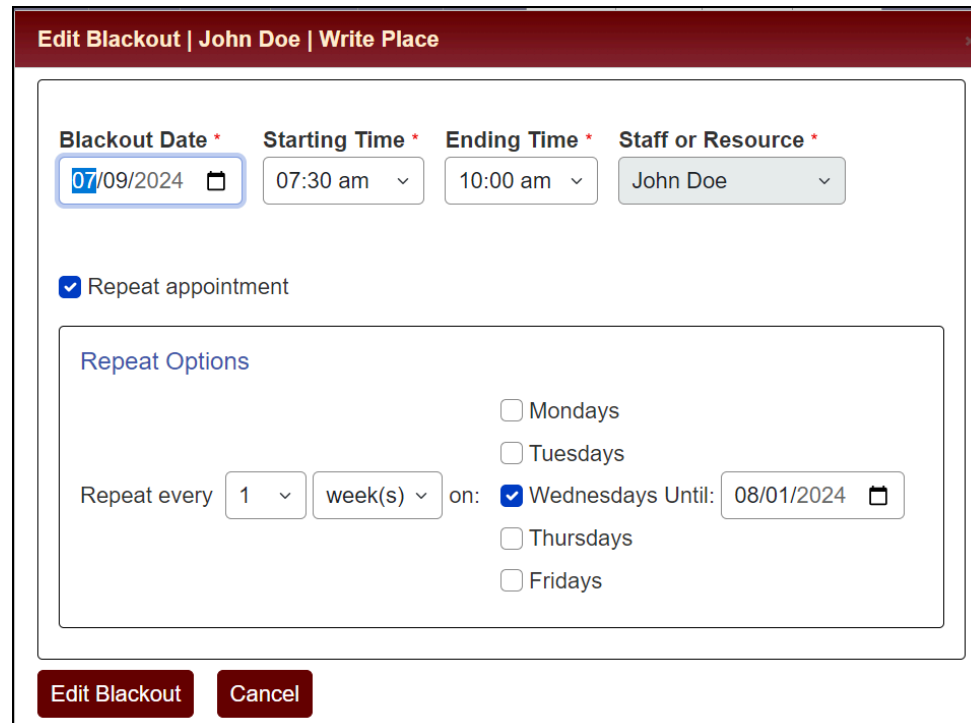
- a. On the schedule calendar, click on the blackout that you want to edit or cancel. This should display the details for the blackout along with some action buttons that allow editing or deleting the blackout.



The screenshot shows a dialog box titled "Existing Blackout". Inside, there is a text field containing "Richard Roe". Below this, the date and time are displayed: "Tuesday, July 23, 2024 | 07:30 am to 03:00 pm". A smaller line of text indicates the recurrence: "Repeats every week on Tuesday from 2024-07-18 to 2024-07-27 at 07:30 am until 03:00 pm". At the bottom of the dialog, there are three buttons: "Edit Blackout" (dark red), "Cancel Blackout" (dark red), and "Close" (blue).

b. Editing Blackout:

- i. This opens a [form similar to the 'Create a Tutoring Blackout'](#). The fields will be filled with the data from the blackout.



The screenshot shows a form titled "Edit Blackout | John Doe | Write Place". The form has four main fields: "Blackout Date" (07/09/2024), "Starting Time" (07:30 am), "Ending Time" (10:00 am), and "Staff or Resource" (John Doe). Below these fields, there is a checked checkbox for "Repeat appointment". Underneath, there is a "Repeat Options" section with radio buttons for "Mondays", "Tuesdays", "Wednesdays", "Thursdays", and "Fridays". The "Wednesdays" option is selected. Below the radio buttons, there is a field for "Repeat every" (1) "week(s)" "on:" followed by "Wednesdays Until:" (08/01/2024). At the bottom of the form, there are two buttons: "Edit Blackout" (dark red) and "Cancel" (dark red).

c. Canceling Blackout:

i. Non-Repeating (One-time) blackout:

Cancel Blackout | [Redacted] | [Write Place](#)

Are you sure that you want to cancel this Blackout?

[Redacted]

Wednesday, July 24, 2024 | 07:30 am to 09:00 am

[Confirm Cancellation](#) [Close](#)

ii. Repeating blackout: For a repeating blackout, an additional dropdown will be present. This lets the tutoring admin select if they want to cancel the entire blackout, or just a single instance (the instance from the clicked date-time).

Cancel Blackout | **John Doe** | [Write Place](#)

Are you sure that you want to cancel this Blackout?

John Doe

Wednesday, July 24, 2024 | 07:30 am to 10:00 am
Repeats every week on Wednesday from 2024-07-09 to 2024-08-01 at 07:30 am until 10:00 am

Repeating Blackout
This blackout is a repeating blackout. Please choose the cancel option below:

This Blackout Only

This Blackout Only

All Linked Blackouts

[Confirm Cancellation](#) [Close](#)

19. Duplicating Schedule

- a. Tutoring admins can duplicate an existing schedule by clicking on the ‘Duplicate Schedule’ link in the home page.

Write Place

Open: **07:30 am to 05:00 pm** | **Monday, Tuesday, Wednesday, Thursday, Friday**
Dates: **2024-01-01 to 2024-08-01**

VIEW: [Schedule](#) | Appts: 4 | Reports: 2 | No-Shows: 0 | Cancellations: 0 | Tutors: 3
MANAGE: [View schedule details](#) | [Edit schedule](#) | [View & manage tutors](#) | [Tutor Availability Management](#)

[Duplicate Schedule](#) | [Delete Schedule](#)

- b. This opens a new form [similar to the ‘Create/Edit Schedule’ Form](#). However, most of the fields will be copied from the schedule you are copying from.
- c. Some fields such as the title and the start-end dates will need to be filled by the tutoring admin for the new schedule.
- d. **PLEASE NOTE: Duplicating a schedule does NOT automatically assign the tutors from the old schedule to the new schedule.** Tutors must be assigned to the new schedule using the “View & Manage Tutors” button for the new schedule in the home page. [Documentation for managing and assigning tutors to a schedule is provided here.](#)

20. Deleting Schedule (CAUTION)

a. Tutoring admins can delete the entire schedule, if necessary.

Write Place

Open: **07:30 am to 05:00 pm** | **Monday, Tuesday, Wednesday, Thursday, Friday**
Dates: **2024-01-01 to 2024-08-01**

VIEW: Schedule | Appts: 4 | Reports: 2 | No-Shows: 0 | Cancellations: 0 | Tutors: 3
MANAGE: View schedule details | Edit schedule | View & manage tutors | Tutor Availability Management

[Duplicate Schedule](#) | [Delete Schedule](#)

b. **PLEASE NOTE: This will delete everything related to the schedule:** all scheduled appointments, associated appointment reports, all assigned tutors, blackout availability for all assigned tutors

Delete Schedule | Write Place

⚠ CAUTION ⚠

You have requested to delete schedule **Write Place**. If you continue, you will be removing the schedule from the system permanently and all associated records such as assigned tutors, tutoring appointments, appointment reports, and blackouts:

- Assigned Tutors Count: 3
 - John Doe
 - Richard Roe
 - [REDACTED]
- Total Appointment Count: 6
 - John Doe: 2
 - Richard Roe: 0
 - [REDACTED]: 4
- Total Appointment Report Count: 2
 - John Doe: 1
 - Richard Roe: 0
 - [REDACTED]: 1
- Availability Blackout Count: 3
 - John Doe: 1
 - Richard Roe: 1
 - [REDACTED]: 1

Are you sure you want to continue?

[Delete Schedule](#) [Close](#)

21. Appointment Reminder Emails

- a. An automated appointment reminder email is sent everyday at 5:30 p.m. for any appointment(s) that are scheduled for tomorrow.
- b. The email is sent to the student and the tutor for the appointment using the [schedule's reminder email template](#).
- c. **PLEASE NOTE: The automated reminder will only be sent if:**
 - i. The schedule for the appointment has [enabled sending reminder emails](#).
 - ii. The tutor for the appointment has [enabled receiving appointment email notification](#). (This only affects the tutor of the appointment).

22. Generate Teams Meeting Link

- a. Online Appointment meetings created by a student are hosted on Microsoft Teams. If there is any issue with a meeting link, the tutoring admin can create a new meeting link on the fly and provide it to the student and the tutor.
- b. This feature is restricted to tutoring admins and must only be used when there is an issue with an appointment meeting link.
- c. This can be accessed via the 'Generate Teams Meeting Link' tab in their home page.

ULM Tutoring | Generate Teams Meeting

[Tutoring Administrator](#) [Tutor](#) [Student](#) [Generate Teams Meeting](#)

In case of any issues with an appointment meeting link, please use this form to generate a new Teams Meeting link.

Success! Meeting created successfully!

- Meeting URL: https://teams.microsoft.com/l/meetup-join/19%3ameeting_...?d

[Generate New Teams Meeting Link](#)

23. Schedule Appointment Reports View - Tutoring Admins Only

- This view provides a tabular list of all appointment reports that have been created for a schedule.
- Filters are provided at the top of the view that allows the admins to search the reports based on a specific date or specific tutor, or both. By default, the filters are empty and the view will display all the reports for the schedule.
- This can be accessed via the 'View Appointment Reports' link on the admin home page (for each schedule)

▼ Administer Schedules

Open: **08:00 am to 05:00 pm** | **Monday, Tuesday, Wednesday, Thursday, Friday**
 Dates: **2024-09-04 to 2024-12-10**

VIEW: [Schedule](#) | Appts: 3 | Reports: 1 | No-Shows: 0 | Cancellations: 2 | Tutors: 8
 MANAGE: [View schedule details](#) | [Edit schedule](#) | [View & manage tutors](#) | [Tutor Availability Management](#)
REPORTS: [View Appointment Reports](#)

[Duplicate Schedule](#) | [Delete Schedule](#)

Schedule Appointment Reports | Write Place

Appointment Date Professor Required Confirmation? Professor Email

Apply

Appointment Reference	Tutor Name	Appointment Date	Actual Appointment Length	Assignment	Worked on Together	Private Note	Professor Email	Professor Required Confirmation?	File Attachment	View
Write Place Appointment for [redacted] with John Doe	John Doe	Mon, 09/30/2024 - 12:00	15 mins	Random Assignment Inst 2	Testing again.		[redacted]@ulm.edu	Yes	[redacted].docx	view
Write Place Appointment for [redacted] with John Doe	John Doe	Mon, 09/23/2024 - 12:00	30 mins	Random Assignment	This is a repeating test with appt report.		[redacted]@ulm.edu	Yes		view
Write Place Appointment for [redacted] with John Doe	John Doe	Wed, 09/18/2024 - 12:00	44 minutes	Report Test Assignment	This is a test please ignore.	Test Instructor Note. Please ignore.	[redacted]@ulm.edu	Yes	[redacted].pdf	view

24. Managing Schedule Closure/Holidays

Tutoring admins can add and remove schedules for any holidays or unforeseen closures. There are 2 types of closures:

- Full-day Closure:** The schedule is closed for the entire day. The tutors are NOT visible in the calendar for the day and no appointments can be scheduled. Example calendar screenshot for a full-day closure:

Apr. 18: Friday	07:30 am	07:45 am	08:00 am	08:15 am	08:30 am	08:45 am	09:00 am	09:15 am	09:30 am	09:45 am	10:00 am	10:15 am	10:30 am	10:45 am	11:00 am	11:15 am	11:30 am	11:45 am	12:00 pm	12:15 pm	12:30 pm	12:45 pm	01:00 pm	01:15 pm
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	07:45 am	08:00 am	08:15 am	08:30 am	08:45 am	09:00 am	09:15 am	09:30 am	09:45 am	10:00 am	10:15 am	10:30 am	10:45 am	11:00 am	11:15 am	11:30 am	11:45 am	12:00 pm	12:15 pm	12:30 pm	12:45 pm	01:00 pm	01:15 pm	

🗓 Spring Break

- Partial Closure:** The schedule is closed for a specific period of time. The tutors are visible in the calendar and appointments can be scheduled on any open time blocks. Example calendar screenshot for a partial-day closure:

Mar. 28: Friday	07:30 am	07:45 am	08:00 am	08:15 am	08:30 am	08:45 am	09:00 am	09:15 am	09:30 am	09:45 am	10:00 am	10:15 am	10:30 am	10:45 am	11:00 am	11:15 am	11:30 am	11:45 am
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	07:45 am	08:00 am	08:15 am	08:30 am	08:45 am	09:00 am	09:15 am	09:30 am	09:45 am	10:00 am	10:15 am	10:30 am	10:45 am	11:00 am	11:15 am	11:30 am	11:45 am	12:00 pm
John Doe ⓘ 👤																		
Dinesh Chhantyal Tutor ⓘ																		

View all existing closures for your schedule: From the admin home page, click on the “Manage Schedule Holidays/Closures” link for your schedule.

Admin Test Schedule

Open: 09:00 am to 05:00 pm | Monday, Tuesday, Wednesday, Thursday, Friday
 Dates: Feb 01, 2025 to May 31, 2025

VIEW: [Schedule](#) | Appts: 1 | Reports: 1 | No-Shows: 0 | Cancellations: 1 | Tutors: 1
 MANAGE: [View schedule details](#) | [Edit schedule](#) | [View & manage tutors](#) | [Tutor Availability Management](#)
 REPORTS: [View Appointment Reports](#)

[Duplicate Schedule](#) | [Delete Schedule](#) | [Archive Schedule](#) | [Manage Schedule Holidays/Closures](#)

The resulting page displays all past and future closures.

Manage Schedule Closure/Holidays | Admin Test Schedule

[+ Add Schedule Closure/Holiday](#)

Past Closures

No past closure/holidays found for the schedule Admin Test Schedule!

Future Closures

<input type="checkbox"/>	Title	Details
<input type="checkbox"/>	Admin Test Closure Full Day	Mar 31, 2025 to Apr 3, 2025 - Full day
<input type="checkbox"/>	Partial Closure Test	Mar 27, 2025 from 09:30 am to 12:20 pm

[Remove selected closures](#)

Removing Closures: Closures in the past cannot be removed. Future Closures can be removed by checking the box on the left of the desired closure and clicking on the “Remove Selected Closure” button. To remove all future closures, click on the checkbox at the header of the Future Closures table and click on the “Remove Selected Closure” button.

Adding New Closures: To add a new closure for your schedule, click on the “Add Schedule Closure/Holiday” link at the top of the Manage Schedule Closure/Holidays page (screenshot above). The resulting page should display a form that lets you enter the details of the closure:

- a. **Closure/Holiday Title:** Title for the closure. This will be displayed in the calendar and also be included in any appointment cancellation emails that will be sent for affected appointments.
- b. **Closure Start Date:** Start Date of the closure.
- c. **Multi-day Closure:** Checking this box reveals a **Closure End Date** field which lets you select an end date for the closure.
 - i. **Closure End Date:** End date for the closure (must be later than the start date)
- d. **Closure Time Type:**
 - i. **Entire Day:** This is the default option. This creates a full-day closure for the selected date(s).
 - ii. **Select Time:** This is used to create a partial closure for the selected date(s). Selecting this will reveal a start time and end time field:
 1. **Start Time:** Start time for the partial closure.
 2. **End Time:** End time for the partial closure (must be later than the start time).

Add Schedule Closure/Holidays | Admin Test Schedule

[Manage Schedule Closure/Holiday](#)

Closure/Holiday Title *

This title will be displayed on the schedule calendar.

Closure Start Date *

Multi-day closure

Closure Time Type: *

Entire Day
 Select Time

[Next](#)

Closure/Holiday Title *

This title will be displayed on the schedule calendar.

Closure Start Date *

Multi-day closure

Closure End Date *

Closure Time Type: *

Entire Day
 Select Time

Closure Start Time *

Closure End Time *

The next page of the form will show you all existing appointments that this closure will affect and cancel if you proceed.

⚠ CAUTION ⚠

You have requested to add a closure for schedule **Write Place**.

Closure Details:

- **Title:** Spring Break Closure
- **Date & Time:** Mar 31, 2025 to Apr 5, 2025 - Full day

This closure overlaps with the following scheduled appointments (Total: 3):

▼ Appointment Details:

- Repeats every week on Monday,Wednesday from 2025-03-26 to 2025-04-26 at 03:00 pm until 04:00 pm (Student: Dinesh Chhantyal, Tutor: Dinesh Chhantyal Tutor)
- Monday, March 31, 2025 | 08:30 am to 09:15 am (Student: Dinesh Chhantyal, Tutor: John Doe)
- Wednesday, April 02, 2025 | 09:00 am to 09:45 am (Student: Dinesh Chhantyal, Tutor: John Doe)

NOTE: For repeating appointments, only instances with overlapping dates will be cancelled.

If you proceed, all listed appointments will be cancelled. A cancellation email will be sent to both the tutor and the student. The following email template will be used:

Edit Template for this closure

Holiday Schedule Email Subject Template:

[center_name]: Appointment Cancellation!

Click here to see the list of available tokens/placeholders that you can use in your email subject and body

Holiday Schedule Email Template:

B I [link icon] [list icon] [bullet icon] Paragraph [source icon] Source

Dear [user_name],

Your appointment on [appointment_date] between [start_time] and [end_time] has been cancelled due to the closure [schedule_closure_title].

Appointment Details:

[appointment_details]

You can make, cancel, or modify appointments by logging into the scheduling system at [tutoring_app_url].

Are you sure you want to continue?

Yes, Add Schedule Closure **Go Back**

In the screenshot sample here:

1: Details of your closure

2: Existing appointments that will be affected and cancelled if this closure is created.

3: Option to Edit the Email template that will be used to send the cancellation email for affected appointments (Emails will be sent to the student and the tutor of the appointment)

4 & # 5: Email Template. Disabled by default. Can be edited when 3 is checked.

25. Managing Schedule Editor Role Access to Tutor

1. **Option 1:** To manage the access of schedule editor role among your tutors, click on the “View and Manage Tutors” link for your schedule.

Admin Test Schedule

Open: 09:00 am to 05:00 pm | Monday, Tuesday, Wednesday, Thursday, Friday
Dates: Feb 01, 2025 to May 31, 2025

VIEW: [Schedule](#) | [Appts: 1](#) | [Reports: 1](#) | [No-Shows: 0](#) | [Cancellations: 1](#) | [Tutors: 1](#)
MANAGE: [View schedule details](#) | [Edit schedule](#) | [View & manage tutors](#) | [Tutor Availability Management](#)
REPORTS: [View Appointment Reports](#)

[Duplicate Schedule](#) | [Delete Schedule](#) | [Archive Schedule](#) | [Manage Schedule Holidays/Closures](#)

The resulting page displays a list of all the tutors for your schedule. The table also displays a field called ‘Is a schedule editor’ that displays whether a particular tutor has the schedule role.

You can select the desired tutor and select the desired action (Adding or Removing) from the action dropdown (#1 in the screenshot image below), and click on the submit button (#2 in the screenshot image below). A confirmation message will be displayed. Once you confirm your submission, the selected tutors will have access to/lose access to the schedule editor role (depending on which action was selected).

Manage Tutors | Spring 2025

[Add a new tutor user to schedule](#)

Action 1

-- Select action --

[Apply to selected items](#) 2

<input type="checkbox"/>	Name	Tutor Email	Availability	Starting Date	Ending Date	Schedule	Is a schedule Editor ?	Edit	Delete
<input type="checkbox"/>		@warhawks.ulm.edu	Available to Everyone	2025-01-27	2025-05-07	Spring 2025	No	Edit Tutor	Delete Tutor
<input type="checkbox"/>		@warhawks.ulm.edu	Available to Everyone	2025-01-27	2025-05-07	Spring 2025	No	Edit Tutor	Delete Tutor
<input type="checkbox"/>		@warhawks.ulm.edu	Available to Everyone	2025-01-27	2025-05-07	Spring 2025	No	Edit Tutor	Delete Tutor
<input type="checkbox"/>	Lawson Megan	megan.l@warhawks.ulm.edu	Available to Everyone	2025-01-27	2025-05-07	Spring 2025	No	Edit Tutor	Delete Tutor

2. **Option 2:** Another way of adding or removing the schedule editor role from your tutor is by clicking on the “Edit Tutor” link from the View & Manage tutor table.

Admin Test Schedule

Open: 09:00 am to 05:00 pm | Monday,Tuesday,Wednesday,Thursday,Friday
Dates: Feb 01, 2025 to May 31, 2025

VIEW: Schedule | Appts: 1 | Reports: 1 | No-Shows: 0 | Cancellations: 1 | Tutors: 1
MANAGE: View schedule details | Edit schedule | **View & manage tutors** | Tutor Availability Management
REPORTS: View Appointment Reports

[Duplicate Schedule](#) | [Delete Schedule](#) | [Archive Schedule](#) | [Manage Schedule Holidays/Closures](#)

Manage Tutors | Admin Test Schedule

[Add a new tutor user to schedule](#)

Action

-- Select action --

Apply to selected items

<input type="checkbox"/>	Name	Tutor Email	Availability	Starting Date	Ending Date	Schedule	Is a schedule Editor ?	Edit	Delete	
<input type="checkbox"/>		al	@warhawks.ulm.edu	Available to Everyone	2025-02-01	2025-03-31	Admin Test Schedule	No	Edit Tutor	Delete Tutor

This shows you the details of the tutor. At the bottom of the page, check the checkbox “Is a schedule editor” and click on Save to add schedule editor role to the tutor. To remove the role, uncheck the checkbox and click on Save.

Is a schedule Editor

[Save](#) [Delete](#)