Scheduler Activity Instructions

Create Activity

The Scheduler activity allows instructors to setup time slots for appointments to which students can then sign up for face-to-face meetings. This activity can also be used as a sign-up tool for other activities (i.e. presentations). The outcome can be recorded (marked as taken place) and a grade given. More than one scheduler activity can be added to a course.

1. Launch https://moodle.coastal.edu

2. Select your course in which to add a scheduler activity.

3. “Turn editing on” from the “Administration“ block

4. From the course main page, go to the section in which to add the scheduler activity and click “Add an activity or resource” then under “Activities“ select the “Scheduler” activity radio button then click “Add” OR double click the icon.
5. Under the “General” section, enter the scheduler Name (required) and Introduction (if desired).

   **General**

<table>
<thead>
<tr>
<th>Name</th>
<th>Office Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td></td>
</tr>
</tbody>
</table>

   Please sign up for an appointment to secure a block of time with me during my office hours.

6. Under the “Options” section, optionally enter the:
   - Role name of the teacher – Label for the individual(s) who meets with students
   - Mode – How appointments can be taken (n appointments in this scheduler – student can book a fixed number of appointments in the activity; n appointments at a time – student is limited to a number of open slots at any given time)
   - Booking in groups – allow students to book a slot for all members of their group
   - Guard time – prevents students from changing their booking shortly before the appointment
   - Default slot duration – length in minutes for the appointment slot
   - Notifications - if enabled, the instructor and students will receive notifications when appointments are created or cancelled
   - Use notes for appointments – if notes are to be used, determine if they are visible to the student and instructor, instructor only, or both

   **Options**

<table>
<thead>
<tr>
<th>Role name of the teacher</th>
<th>Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mode</td>
<td></td>
</tr>
<tr>
<td>Students can register</td>
<td>4 appointment(s) in this scheduler</td>
</tr>
<tr>
<td>Booking in groups</td>
<td>No</td>
</tr>
<tr>
<td>Guard time</td>
<td>1 hours</td>
</tr>
<tr>
<td>Default slot duration</td>
<td>30</td>
</tr>
<tr>
<td>Notifications</td>
<td>No</td>
</tr>
<tr>
<td>Use notes for appointments</td>
<td>Appointment note, visible to teacher and student</td>
</tr>
</tbody>
</table>

7. The “Grade”, “Common module settings”, “Restrict access”, and “Tags” sections are also available and are setup the same as with any other activity. NOTE: for grading, ensure that the grading strategy is set properly.
8. Click on “Save and return to course” (return to course home page) and you will see the activity added to the page.

OR

click on “Save and display” to go directly to the activity to add slots.

Add Slots

In the case that instructors, co-instructors, teaching assistants, etc. will meet with students, multiple sets of slots can be created. Students can identify who they will meet with when booking the slot.

Note: If the instructor has multiple classes for the semester and is using the scheduler in each class, they will be alerted if there is a conflict in scheduling.

1. Click on the “My appointments” tab. In the screen shot below, notice that the “Name” (Office Hours) and “Introduction” (Please sign up for an appointment to secure a block of time with me during my office hours.) entered under the “General” section when setting up the activity appears.

Office Hours

Please sign up for an appointment to secure a block of time with me during my office hours.

2. Under “Slots”, click “Add slots” and select either “Add repeated slots” or “Add single slot”
• Add repeated slots – These repeat every week on the same day(s) and for the same time(s) OR multiple slots for one day.
  Under the “Add repeated slots” section, enter the:
  Date – start date of the appointments
  Repeat time slots until – if enabled, end date of appointments
  Add appointments on – select the days of the week the appointments occur
  Time range – enter the from and to time for the appointments
  Divide into slots – if “Yes”, will create appointments for the date and time range based on the duration; if “No”, will create one appointment on the date(s) and time range
  Duration – minutes per appointment
  Break between slots – minutes between appointments
  Force when overlap – if “No”, the existing appointment that overlaps is kept and the new appointment cannot be created; if “Yes”, the existing appointment is deleted and the new appointment created
  Maximum number of students per slot – if enabled, the number of students designated can schedule an appointment; if disabled, there is no maximum number of students that can schedule an appointment (the slot will never be full)
  Location – the meeting location
  Teacher – the individual facilitating the appointment
  Display slot to students from – day from which the student will see the appointment
  Email a reminder – indicates when to email an appointment reminder to the student

Click on “Save changes”
Add repeated slots

Date: 11 ▼ October ▼ 2017 ▼

Repeat time slots until: 11 ▼ December ▼ 2017 ▼

Enable

Add appointments on: □ Monday □ Tuesday □ Wednesday □ Thursday □ Friday □ Saturday □ Sunday

Time range:
From: 09 ▼ 00 ▼ To: 11 ▼ 00 ▼

Divide into slots?: Yes ▼

Duration: 30 minutes per slot

Break between slots: 15 minutes

Force when overlap: No ▼

Maximum number of students per slot: 1 ▼

Enable

Location: Office

Teacher: Demo Instructor1 ▼

Display slot to students from: Now ▼

Email a reminder: Never ▼

Save changes ▼ Cancel ▼
Add single slot – create one appointment. This procedure can also be used to record an unscheduled appointment in order to document that the appointment took place.

Under the “Add single slot” section, enter the:
- Date – date and time of the appointment
- Duration – minutes of appointment
- Ignore scheduling conflicts – if checked, the appointment will be moved to the requested date and time even if other slots exist at the same time. This may cause overlapping of appointments so use with care.
- Maximum number of students per slot – if enabled, the number of students designated can schedule an appointment; if disabled, there is no maximum number of students that can schedule an appointment (the slot will never be full)
- Location – the meeting location
- Teacher – the individual facilitating the appointment
- Display slot to students from – day from which the student will see the appointment
- Email a reminder – if enabled, indicates when to email an appointment reminder to the student
- Comments – instructor comments to themselves

**Add single slot**

- **Date**: October 12, 2017, 13:00
- **Duration**: 30 minutes
- **Ignore scheduling conflicts**: Checked
- **Maximum number of students per slot**: 1, enabled
- **Location**: Office
- **Teacher**: Demo Instructor1
- **Display slot to students from**: October 11, 2017
- **Email a reminder on**: October 11, 2017, enabled
- **Comments**: 

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If you know the student(s) for which this appointment was created, under the “Appointment 1” section, enter the:

Student – select the student for the appointment
Notes for appointment (visible to student) – instructor comments to be shared with the student (depending on how Notes are setup in the activity’s setting)

### Appointment 1

<table>
<thead>
<tr>
<th>Student</th>
<th>Notes for appointment (visible to student)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo Student1</td>
<td><img src="image" alt="Notes options" /></td>
</tr>
</tbody>
</table>

Click on “Add another student” if multiple students are to attend the appointment

When finished adding students, click on “Save changes”

- Click on “Add another student” if multiple students are to attend the appointment
- When finished adding students, click on “Save changes”

### Managing Appointments

Instructors can see all of their available slots and appointments on the “My appointments” tab. If slots have been added for a co-instructor, view all slots from the “All appointments” tab. From either tab that you have access to, available slots and appointments, revoke and schedule appointments, delete slots, and send reminders can be viewed.

1. The “Action” column will show up to 4 icons.
   - X - delete the slot.
   - 📅 - change the slot date/time (even after the student is assigned), duration, assign one or more students, and make notes about the appointment after the fact.
   - 🚼 - limit the slot to one student (or one group). When clicked, it will toggle to 🚼, which opens the slot to unlimited students (or groups).
   - ⌘ - revoke or un-assign the current student from the slot opening it for other students. This icon only appears when the slot has been scheduled.
Recording Appointments

To record an appointment, mark the student as “Seen” or “Attended” (the word you see depends on where you record the appointment). You may want to add comments and/or grade prior to marking the appointment.

1. To add mark as seen(attended), apply a grade, or make notes, click the (change) icon in the “Action” column next to the student’s name or click on the student’s name next to the appointment.
   Click the checkbox next to “Seen” if recording from the change icon OR next to “Attended” if recording from the student’s name.
   Select a grade from the “Grade” dropdown box (if grading is enabled).
   Enter the notes in “Notes for appointment (visible to student)” and “Confidential notes (visible to teacher only)” box.
   Note: The comment boxes that appear are dictated by how the “Options“ section “Use notes for appointments” was setup when the activity was created.

   ![Student: Demo Student1, Seen ✔, Grade 2]

   Notes for appointment (visible to student)

   Confidential notes (visible to teacher only)

2. If the student hasn’t been marked as attended from the above step, this can be done from the “My appointments” tab (if only one instructor) or “All appointments“ tab (if multiple instructors) by checking the box next to the student’s name.

   ![Actions, Add slots, Delete slots, Date: Thursday, September 14, 2017, Start: 4:45 PM, End: 5:15 PM, Students: DemoStudent Smith, Instructor: Jane Eckert, Action: ]

   OR

   by clicking the student’s name and checking “Attended”

   This appointment | All appointments of this student

   [Attend ✔]
Deleting Appointments

In addition to deleting appointments from the “Action” column using the ✗ icon (delete), slots can be deleted from either the “My appointments” tab (if only one instructor) or “All appointments” tab (if multiple instructors).

1. From the “My appointments” tab, under “Slots, click “Delete slots”. There are 3 possibilities for deletion, if you are not deleting selected appointments, click on the option you desire.

### Slots

You can add additional appointment slots at any time.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Add slots</th>
<th>Delete slots</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>✗ Delete selected slots</td>
</tr>
<tr>
<td></td>
<td></td>
<td>✗ Delete my unused slots</td>
</tr>
<tr>
<td></td>
<td></td>
<td>✗ Delete all my slots</td>
</tr>
</tbody>
</table>

OR
From the “All appointments” tab, under “Slots, click “Delete slots”. There are 5 possibilities for deletion, if you are not deleting selected appointments, click on the option you desire.

### Slots

You can add additional appointment slots at any time.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Add slots</th>
<th>Delete slots</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, October 11, 2017</td>
<td>Delete selected slots</td>
<td>Delete all slots</td>
</tr>
<tr>
<td>Friday, October 13, 2017</td>
<td>Delete unused slots</td>
<td>Delete my unused slots</td>
</tr>
</tbody>
</table>

2. To delete selected slots, check the box next to the appointment(s) to be deleted.

### Slots

You can add additional appointment slots at any time.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Add slots</th>
<th>Delete slots</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Start</th>
<th>End</th>
<th>Students</th>
<th>Instructor</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday, September 14, 2017</td>
<td>4:45 PM</td>
<td>5:15 PM</td>
<td>DemoStudent Smith</td>
<td>Jane Eckert</td>
<td></td>
</tr>
</tbody>
</table>

Click “Delete slots” and then click “Delete selected slots”

<table>
<thead>
<tr>
<th>Actions</th>
<th>Add slots</th>
<th>Delete slots</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday, September 14, 2017</td>
<td>Delete selected slots</td>
<td>Delete all slots</td>
</tr>
<tr>
<td>Monday, September 18, 2017</td>
<td>Delete unused slots</td>
<td>Delete my unused slots</td>
</tr>
<tr>
<td>Tuesday, September 19, 2017</td>
<td>Delete all my slots</td>
<td></td>
</tr>
</tbody>
</table>
Appointment Overview

Scheduled appointments in courses and schedulers can be viewed on the overview tab.

1. From the “Overview” tab, the instructor can see their courses that contain a scheduler activity, the scheduler name, when and where the appointment is to occur, who they are meeting, purpose of the meeting, grade (if grading is enabled), and comments (both viewable by student and instructor only).

The instructor can select whose slots to view (if the course has co-instructors) and slots at three levels.
- this scheduler – only appointment for the opened scheduler
- this course – all schedulers in the current course
- the entire site – all courses the instructor is assigned in the site

This example is showing slots from the entire site. Notice that MISC_Jane2017 contains two schedulers, Presentation and Office Hours; and each meets at a different location.
Appointment Statistics

View appointment statistics for the current course by five categories, “Overall”, “By student”, By Instructor”, “By slot duration”, or “By group size”.

Overall – displays the number of enrolled students, number of students that attended an appointment, number of students assigned and number of students not assigned an appointment, and number of available slots for yourself and co-instructors.

Attendable

Total candidates for scheduling: 3

Attended

Amount of attended students: 1

Unattended

Student appointed: 1
Unappointed students: 1

Available slots

Owned: 16
Not owned: 4
All slots: 20

By student – displays the student and the duration of appointment(s)
### By Instructor – displays the instructor and any co-instructors and the summed duration of appointment(s)

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Summed duration of appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo Instructor</td>
<td>45</td>
</tr>
</tbody>
</table>

### By slot duration – displays the duration of the appointment and the number of appointments for the duration

<table>
<thead>
<tr>
<th>Duration</th>
<th>Appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td>30</td>
<td>1</td>
</tr>
</tbody>
</table>

### By group size – displays the number of students for an appointment slot, the number of slots that contain the group size, and the summed duration of the appointments for the group size

<table>
<thead>
<tr>
<th>Group size</th>
<th>Occurrences</th>
<th>Summed duration of appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>45</td>
</tr>
</tbody>
</table>
Appointment Export

The instructor can export the appointment calendar to a file. The default fields are appointment date, start and end time, instructor, student’s full name, and attended value. The default file type is csv.

Under the “General” section, determine:
Format - how you want the data to display (One line per slot, One line per appointment, or Appointments grouped by slot)
Include slots for – whose slots do you want to export (Everyone, Myself)
Pagination – if exporting multiple instructors’ appointments, determine if they should be separated (All slots on one page or One page for each Instructor).
Include empty slots – set according to whether you want to see the slots that are not assigned to a student (No or Yes).

Export slots and appointments

- General

- Format
  - One line per slot
  - One line per appointment
  - Appointments grouped by slot

- Include slots for
  - Everyone

- Pagination
  - All slots on one page

- Include empty slots
  - Yes
Under the “Data to Include” section, select the data you want the file to contain.

### Data to Include

<table>
<thead>
<tr>
<th>Slot</th>
<th>Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Student full name</td>
</tr>
<tr>
<td>Start time</td>
<td>Student first name</td>
</tr>
<tr>
<td>End time</td>
<td>Student last name</td>
</tr>
<tr>
<td>Location</td>
<td>Student e-mail</td>
</tr>
<tr>
<td>Instructor</td>
<td>Student user name</td>
</tr>
<tr>
<td>Max. students</td>
<td>Student id number</td>
</tr>
<tr>
<td>Slot notes</td>
<td>Appointment</td>
</tr>
<tr>
<td></td>
<td>Attended</td>
</tr>
<tr>
<td></td>
<td>Grade</td>
</tr>
<tr>
<td></td>
<td>Appointment note (to student)</td>
</tr>
<tr>
<td></td>
<td>Confidential note (teacher only)</td>
</tr>
</tbody>
</table>

Under the “File format” section, determine to which type of file you want the data exported.

### File format

- **File format**: CSV, Excel, ODS, HTML, PDF
- **Field separator for CSV**: Comma
- **PDF page orientation**: Portrait

Click “Preview” to see what the file will look like (the preview is below the bank of buttons) OR “Create export file”