

Coastal's Office of Online Learning (COOL)

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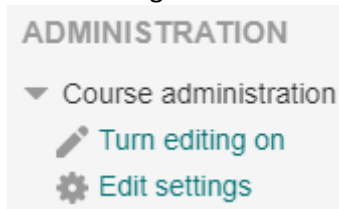
[www.coastal.edu/online](http://www.coastal.edu/online)

## 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

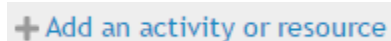


OR

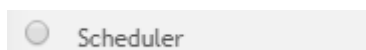
the upper right corner of the screen



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.



ACTIVITIES




- Under the “General” section, enter the scheduler Name (required) and Introduction (if desired).

▼ General

Name\*

Introduction



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

- 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


Role name of the teacher 

Mode  Students can register  appointment(s)

Booking in groups 

Guard time     Enable

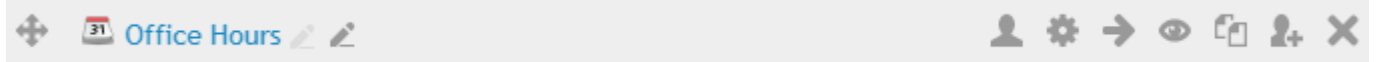
Default slot duration 

Notifications 

Use notes for appointments

- 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.

- Click on “Save and return to course” (return to course home page) and you will see the activity added to the page.



OR

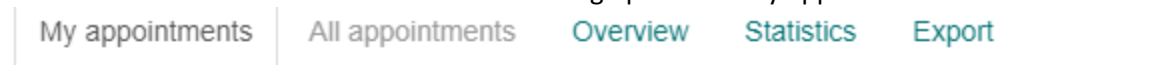
click on “Save and display” to go directly to the activity to add slots.

### 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.

- 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

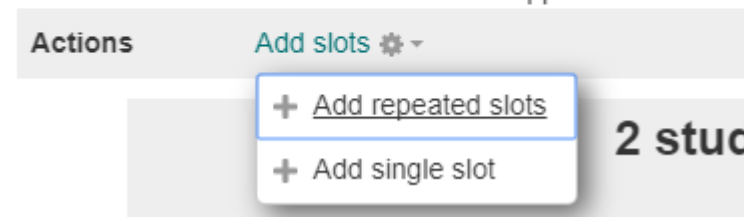
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Please sign up for an appointment to secure a block of time with me during my office hours.

- Under “Slots”, click “Add slots” and select either “Add repeated slots” or “Add single slot”


## Slots


Please click on the button below to add appointment slots.



- 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**  12 ▾ October ▾ 2017 ▾ 13 ▾ 00 ▾ 


**Duration** 30 minutes


**Ignore scheduling conflicts** 

**Maximum number of students per slot** 1  Enable 

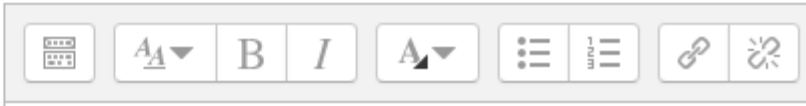
**Location**  Office

**Teacher\***  Demo Instructor1 ▾

**Display slot to students from** 11 ▾ October ▾ 2017 ▾ 

**Email a reminder on** 11 ▾ October ▾ 2017 ▾   Enable

**Comments**



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

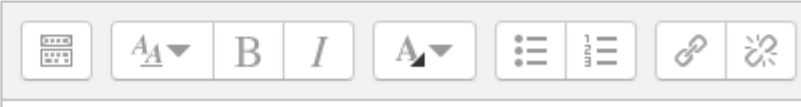
Student – select the student for the appointment

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

**Student** Demo Student1 ▾ Seen  Grade No grade ▾

**Notes for appointment (visible to student)**



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

Add another student

When finished adding students, click on “Save changes”

Save changes

Cancel

### 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.

✕ - 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

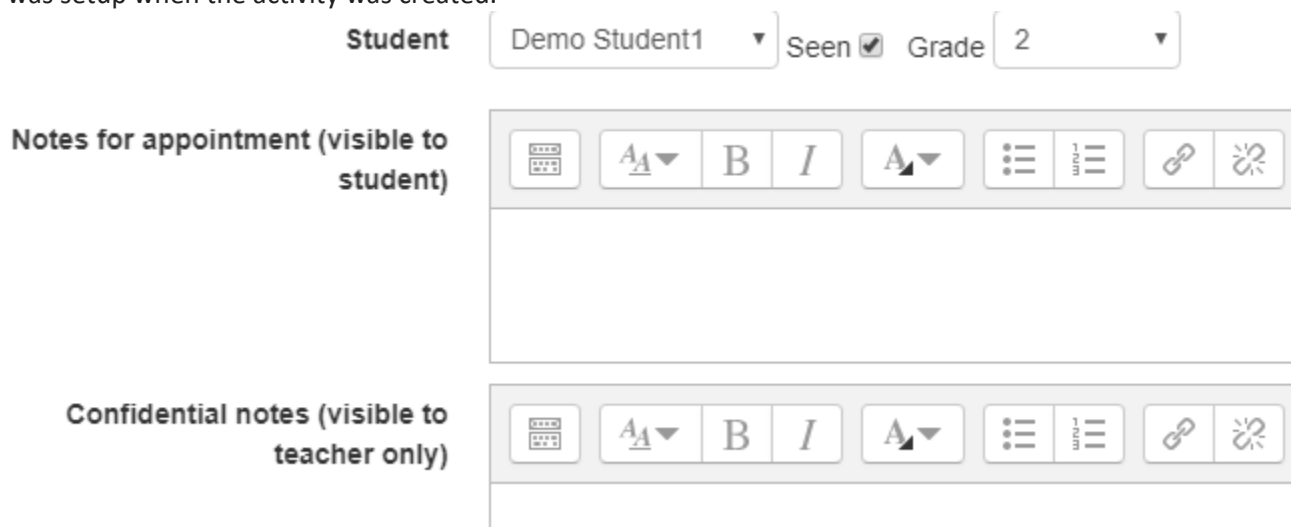
To record an appointment, mark the student as “Seen” or “Attended” (the word you see depends on where you record the appointment). You may want to add comments and/or grade prior to marking the appointment.

- 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)**



- 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						
Date	Start	End	Students	Instructor	Action	
<input type="checkbox"/> Thursday, September 14, 2017	4:45 PM	5:15 PM	<input checked="" type="checkbox"/>  DemoStudent Smith	Jane Eckert		  

OR

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

This appointment [All appointments of this student](#)

**Attended**



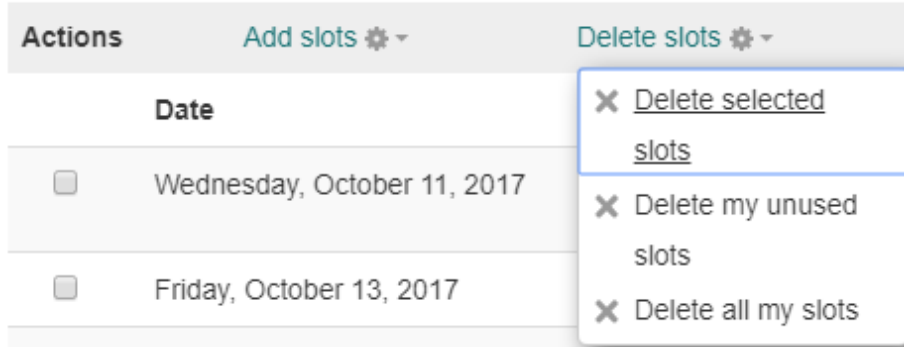
## Deleting Appointments

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.



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.

Actions	Add slots ⚙️	Delete slots ⚙️
<b>Date</b>		
<input type="checkbox"/>	Wednesday, October 11, 2017	<ul style="list-style-type: none"><li>✕ <u>Delete selected slots</u></li><li>✕ Delete all slots</li><li>✕ Delete unused slots</li><li>✕ Delete my unused slots</li><li>✕ Delete all my slots</li></ul>
<input type="checkbox"/>		
<input type="checkbox"/>	Friday, October 13, 2017	
<input type="checkbox"/>		
<input type="checkbox"/>		

- 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.

Actions	Add slots ⚙️	Delete slots ⚙️				
Date	Start	End	Students	Instructor	Action	
<input checked="" type="checkbox"/>	Thursday, September 14, 2017	4:45 PM	5:15 PM	<input type="checkbox"/> DemoStudent Smith	Jane Eckert	✕ ⚙️ 👤 🗨️

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

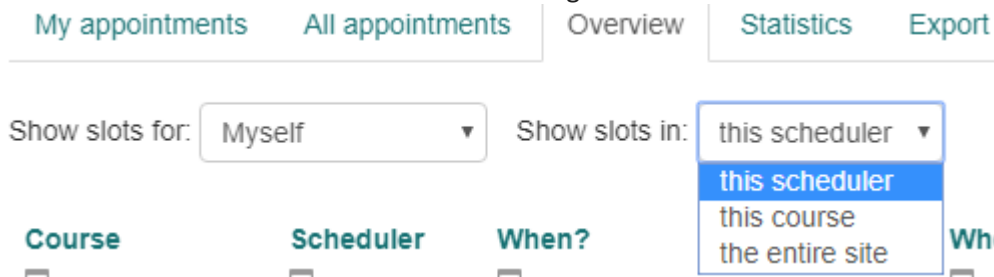
Actions	Add slots ⚙️	Delete slots ⚙️
<b>Date</b>		
<input checked="" type="checkbox"/>	Thursday, September 14, 2017	<ul style="list-style-type: none"><li>✕ <u>Delete selected slots</u></li><li>✕ Delete all slots</li><li>✕ Delete unused slots</li><li>✕ Delete my unused slots</li><li>✕ Delete all my slots</li></ul>
<input type="checkbox"/>	Monday, September 18, 2017	
<input type="checkbox"/>	Tuesday, September 19, 2017	
<input type="checkbox"/>		

## Appointment Overview

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

- 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.

My appointments All appointments Overview Statistics Export

Show my slots in: the entire site

Reset table preferences

Course	Scheduler	When?	Where?	With whom?	What?	What resulted?	What happened?
MISC_JT2017	Group Presentation	10/11/17, 14:00 for 15 minutes	Meeting Room 1	Demo Student1		No grade	
MISC_Jane2017	Presentation	10/13/17, 10:00 for 10 minutes	Classroom	Demo Student1		No grade	Class presentation date and time.
	Office Hours	10/11/17, 12:00 for 15 minutes	Office	Demo Student1	comments pertaining to the slot	5/5	notes for student confidential notes for instructor

## 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.

[My appointments](#) [All appointments](#) [Overview](#) [Statistics](#) [Export](#)

[Overall](#) [By student](#) [By Instructor](#) [By slot duration](#) [By group size](#)

### 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)

[My appointments](#) [All appointments](#) [Overview](#) [Statistics](#) [Export](#)

[Overall](#) [By student](#) [By Instructor](#) [By slot duration](#) [By group size](#)

Student	Duration
Demo Student1	60

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

[My appointments](#) [All appointments](#) [Overview](#) [Statistics](#) [Export](#)

[Overall](#) [By student](#) [By Instructor](#) [By slot duration](#) [By group size](#)

Instructor	Summed duration of appointments
Demo Instructor1	45

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

[My appointments](#) [All appointments](#) [Overview](#) [Statistics](#) [Export](#)

[Overall](#) [By student](#) [By Instructor](#) [By slot duration](#) [By group size](#)

Duration	Appointments
15	2
30	1

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

[My appointments](#) [All appointments](#) [Overview](#) [Statistics](#) [Export](#)

[Overall](#) [By student](#) [By Instructor](#) [By slot duration](#) [By group size](#)

Group size	Occurrences	Summed duration of appointments
3	1	15
1	2	45

## 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** ?

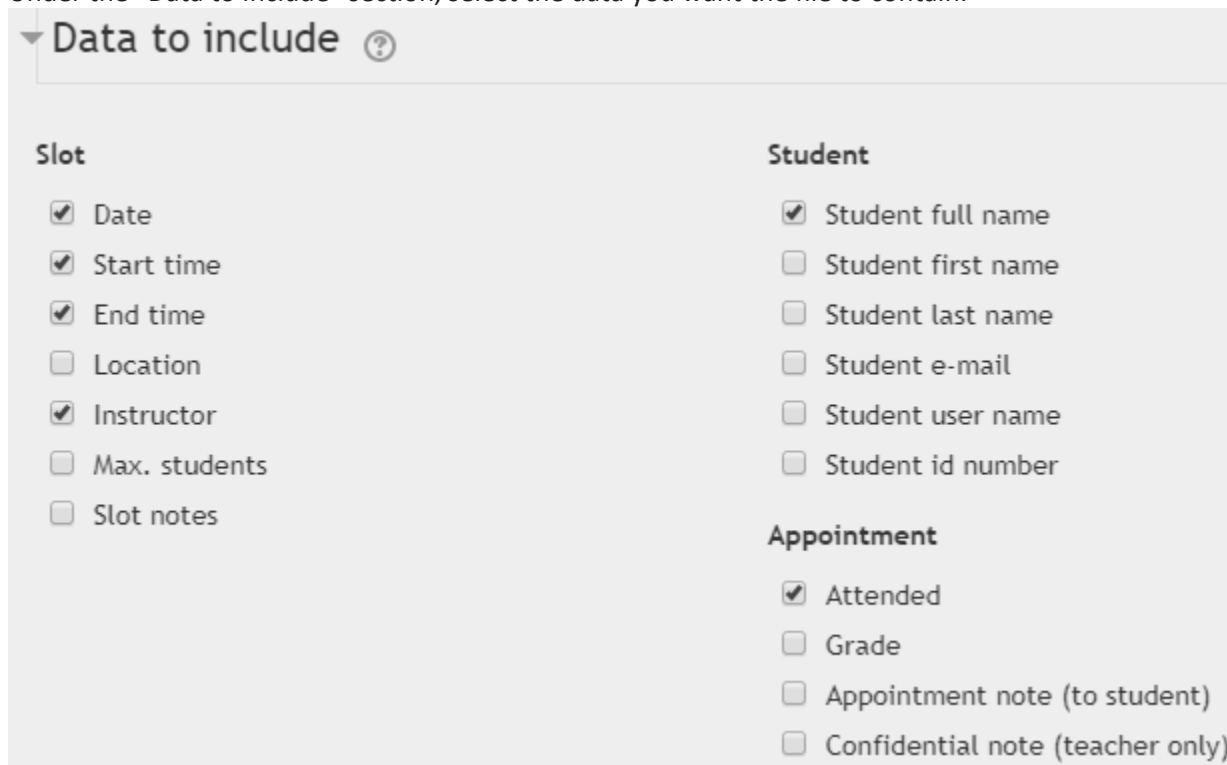
One line per slot  One line per appointment  Appointments grouped by slot

**Include slots for**

**Pagination** ?

**Include empty slots**

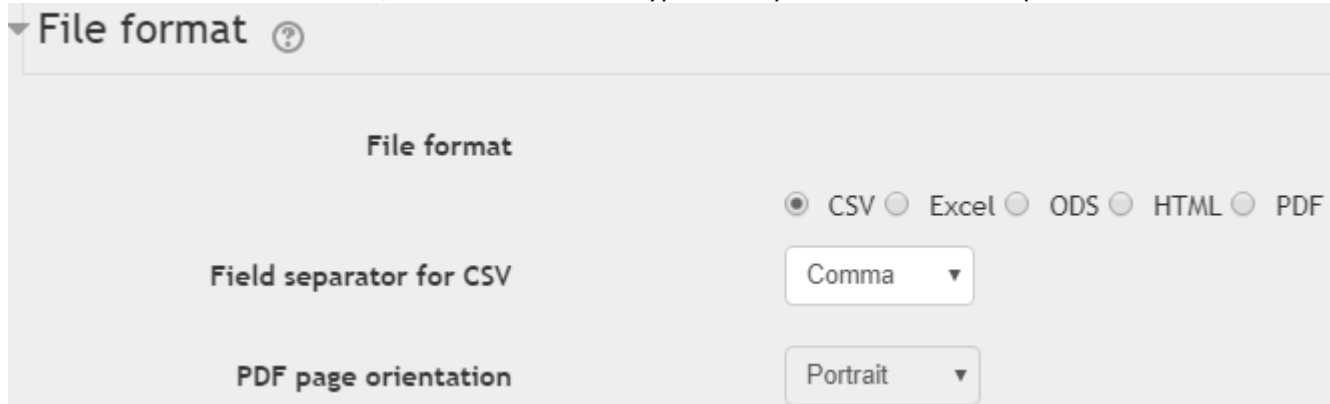
Under the “Data to Include” section, select the data you want the file to contain.



**Data to include** ⓘ

<b>Slot</b>	<b>Student</b>
<input checked="" type="checkbox"/> Date	<input checked="" type="checkbox"/> Student full name
<input checked="" type="checkbox"/> Start time	<input type="checkbox"/> Student first name
<input checked="" type="checkbox"/> End time	<input type="checkbox"/> Student last name
<input type="checkbox"/> Location	<input type="checkbox"/> Student e-mail
<input checked="" type="checkbox"/> Instructor	<input type="checkbox"/> Student user name
<input type="checkbox"/> Max. students	<input type="checkbox"/> Student id number
<input type="checkbox"/> Slot notes	
	<b>Appointment</b>
	<input checked="" type="checkbox"/> Attended
	<input type="checkbox"/> Grade
	<input type="checkbox"/> Appointment note (to student)
	<input type="checkbox"/> Confidential note (teacher only)

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**

**PDF page orientation**

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

