

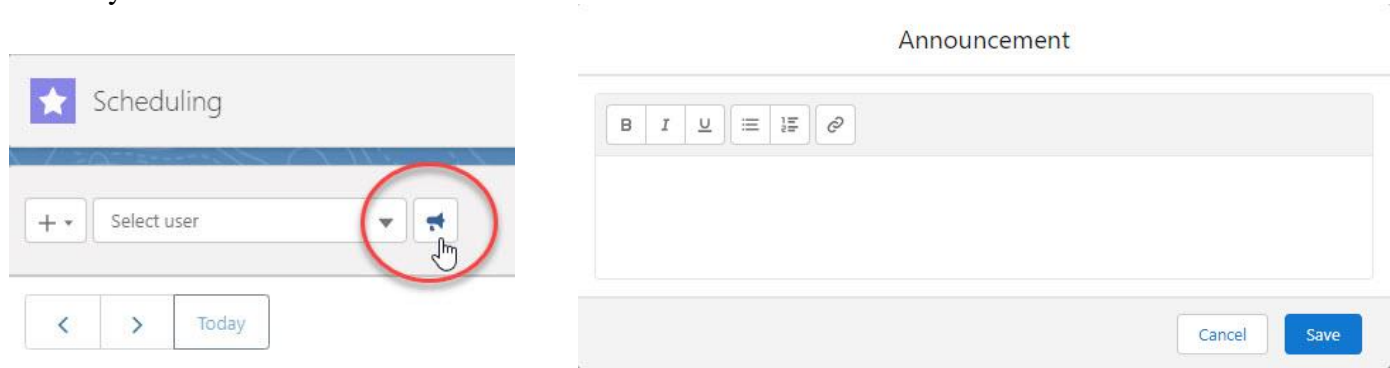
Student Administration Instruction Document

Module:	Academic Advisement
Business Process Name:	Scheduling – Creating availability for appointments
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Creation Date:	May 11, 2023

Please be sure that you have already set up your Trellis profile. The information you input on that page will be displayed to the people trying to schedule an appointment with you.

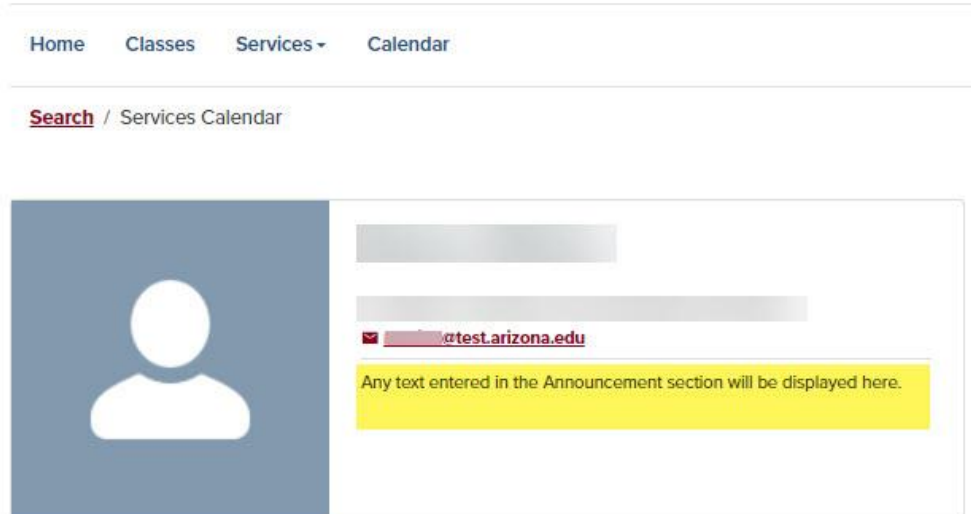
*An important feature to utilize is the announcement button above your calendar. The information you provide here will also display as an announcement when people are on your calendar looking to schedule an appointment.

**Advisors please note that the information you provide here will also display in the notes field on the ARC directory.



The screenshot shows the 'Scheduling' interface. On the left, there is a 'Select user' dropdown menu with a blue announcement icon button circled in red. Below it are navigation arrows and a 'Today' button. On the right, the 'Announcement' section contains a rich text editor with formatting options (B, I, U, list, link) and a large text area. At the bottom right of the announcement section are 'Cancel' and 'Save' buttons.

CatCloud



The screenshot shows the 'CatCloud' interface. At the top, there is a navigation bar with 'Home', 'Classes', 'Services', and 'Calendar'. Below this is a breadcrumb trail: 'Search / Services Calendar'. The main content area features a profile card with a blue background and a white person icon. To the right of the icon, there are several greyed-out text fields. One field contains the email address '@test.arizona.edu'. Below the email field, a yellow box contains the text: 'Any text entered in the Announcement section will be displayed here.'

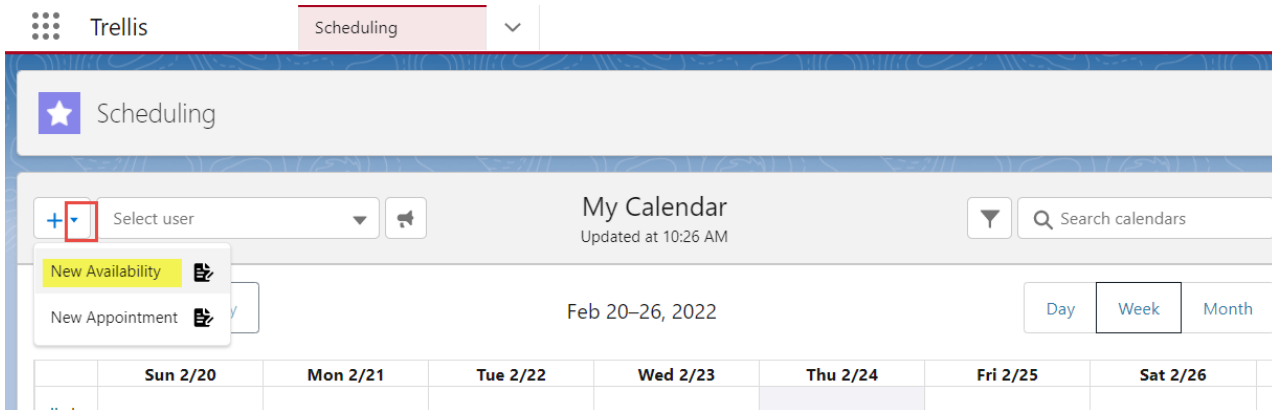
Availability

Creating availability is how students can schedule appointments with you, see drop-in hours, or see when

you are busy.

To create availability on your calendar:

1. Go to the Scheduling tab to view your calendar.
2. Select/click any empty space on the calendar.
3. Fill out the availability form.
 - All fields marked with a red asterisk are required



Select availability type:

You can select between appointments, drop-in, or busy. If you select appointments, students can schedule appointments with you. If drop-in, students can see the details of the drop-in availability. If busy, students cannot schedule appointments with you for that time.

When you create availability, the "Appointments" availability type should be selected by default. After this, are multiple fields for you to fill out. All fields marked with a red asterisk are required.

The screenshot shows the 'New Availability' form. At the top, there's a title 'New Availability'. Below it, there's a 'Select availability type:' section with three tabs: 'Appointments' (highlighted in blue), 'Drop-in', and 'Busy'. The main form area is titled 'Your Availability' and contains several fields, each marked with a red asterisk to indicate they are required: '* Availability Name' (text input), '* Availability Date' (date picker), '* Start Time' (time picker), '* Number of Appointments' (text input), and '* Duration of Each Appointment' (dropdown menu). At the bottom, there are four buttons: 'Cancel', 'Save & Clone', 'Save & New', and 'Save'.

Availability name

By default, the availability name is "[your name]'s Availability". Feel free to change this field if it makes sense for you.

Availability date & start time

Choose the date and start time of your availability in these fields.

Number of appointments, duration of each appointment, & end time

Setting the number of appointments and duration of each appointment allows students to schedule appointments themselves. For instance, say you have availability with 4 appointments that are 30 minutes each. A student could select one of those appointment blocks to schedule an appointment with you.

Based on the number of appointments and duration of each appointment, the end time is automatically calculated.

Appointment scheduling deadline

Setting an appointment scheduling deadline means students have to schedule an appointment before the deadline. For instance, if the deadline is two hours, then students must schedule their appointment two or more hours before the appointment's start time.

This feature is useful if you want ample time to prepare for your appointments and want to prevent last-minute appointments.

Make recurring availability

You are able to create an availability of any type (appointment, drop-in, or busy) one time and have that availability recur on your calendar for one or more days per week across multiple weeks.

To create a recurring availability, select the checkbox labeled "Make recurring availability". After selecting the checkbox, you will see additional options for modifying your recurring availability.

Make recurring availability

Repeat the recurrence every

* Scheduled Day(s)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
-----	-----	-----	-----	-----	-----	-----

* Stop Recurring After

This will create an instance of the recurrence on the selected day(s) of the week, occurring every X weeks until the end date. Note, the system will only allow for instances of your recurrence to be created up to 90 days from the start date of the first availability in the series.

Meeting types

Select one or more meeting types. You can choose between in-person, Zoom, or phone. When you select an option, a new field will appear based on the option.

If in-person, search for the availability location. This is a record search field, so it pulls from records already in Trellis. Type the first two characters of any word in a building name or room number, then type a "*" after those characters as a wildcard to search. (e.g. Mc* Ha* 21* returns McClelland Hall, Rm 210). If the room you want isn't in the system, contact [24/7 IT Support](#) and the Trellis team will add it.

The Zoom link and phone number automatically fill in based on what you specified in your profile. You can also manually edit them in the availability form.

For the phone option, you can select "I will phone the student" if you want to call the student, instead of them calling you. If you check this, the student will provide their phone number when they schedule an appointment with you.

Availability Details

* Meeting Types

- In Person
- Phone
- Zoom

Availability Details

* Meeting Types

- In Person
- Phone
- Zoom

* Where ?

Q Douglass, Rm 300A

Availability Details

* Meeting Types

- In Person
- Phone
- Zoom

Student will phone me at ?

* Phone ?

() _-__

Please add a phone number to your User record [here](#).

I will phone the student

Availability Details

* Meeting Types

- In Person
- Phone
- Zoom

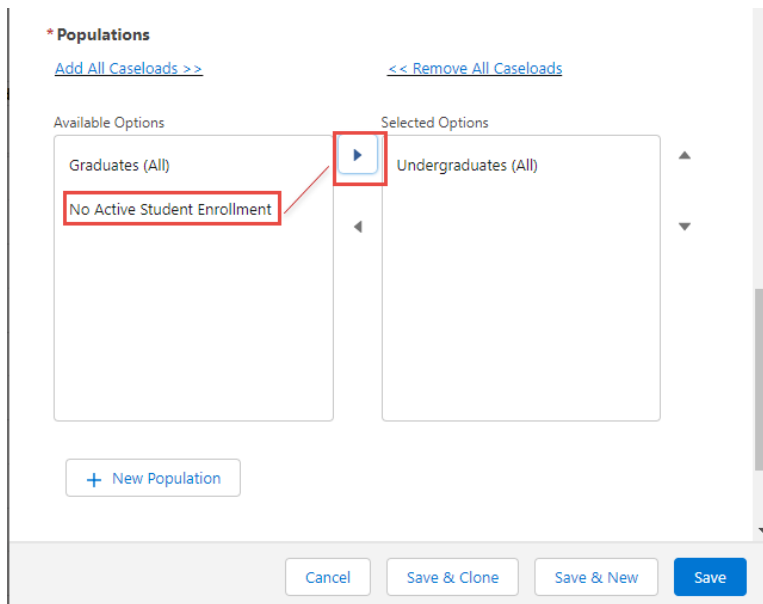
* Zoom Link ?

<https://arizona.zoom.us/j/208>

Populations

Populations indicate which students are able to see the availability. For example, if you add the "Undergraduates (All)" population, then all currently-enrolled undergraduate students can see the availability. But, students that are not undergraduates (not current students, prospective students for example) cannot see that specific availability.

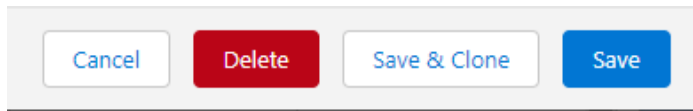
Adding populations is the same as adding meeting types above. You have to choose at least one population, though you can add multiple populations. Each population will then be able to see the availability.



See our Knowledge article on [Using populations](#) for more info.

Saving your availability

You have a few options for saving your availability at the bottom of the modal window: save, save & new, and save & clone.



"Save" simply saves the availability and takes you back to the Scheduling tab.

"Save & New" saves the availability and brings you to a new, mostly blank form (only the defaults are filled out, such as availability name).

"Save & Clone" saves the availability and brings you to a new form that is the exact same as the one you just filled out.

Please note: Student Workers who get the scheduling feature assigned to them will have "Suppress From Availability" automatically checked on their Trellis profile. This will ensure they do not appear to other students in the search results as someone who is potentially available for them to make an appointment with. Student Workers can update this setting on their profile as needed if their role requires them to schedule their own appointments with other students.

See our other help articles on creating availability below for detailed walkthroughs of each section of the form.

- [Scheduling - Creating availability for drop-ins](#)
- [Getting Started – Trellis 101: Setting up your profile](#)