



[Previous Article - Appointments](#) | [Back to Tutor Manual](#) | [Next Article - View All Appointments](#)

Create New Appointments

Purpose: To Schedule student-tutor appointments.

How to Access: *Center Attendance* > *Appointments* > *Create New Appointment*

To create a new appointment you must follow the steps below:

1. **Select Student:** In this field you can start searching for a student just by typing his/her name on the provided text box. **(You can choose more than one student)**

2. **Select Center or Find Service:** In this field you can either search for a center/service or you can scroll down and manually look for it. **(By clicking “Find Service” a pop up menu of all the services appears)**

3. **Select Service:** In this field you select a service by clicking on the check boxes next to the

name **(You can choose more than one service)**

The screenshot shows the 'New Appointment' form. On the left, a vertical progress bar indicates the steps: Student, Center, Service (selected), Subject Area, Professor, Pick a Slot, and Confirm. The main content area is titled 'Select Service' and features a search bar with the placeholder 'Search service...'. Below the search bar, it says 'Type to search service...' and 'Services in Math Center (West Campus)'. There are two checkboxes: 'Computer Use' and 'Tutoring'. On the right, a 'PREVIEW' section shows the appointment details for 'Sandy Antonio' at 'Math Center (West Campus)'. Below the preview, there is a 'Start over' button and a 'Having trouble?' section with links for 'New by Staff Member', 'New by Date', 'Wizard', and 'Manual'.

4. **Select Subject Area:** In this field you select a Subject Area of which you want your appointment to be in.

The screenshot shows the 'New Appointment' form. On the left, a vertical progress bar indicates the steps: Student, Center, Service, Subject Area (selected), Professor, Pick a Slot, and Confirm. The main content area is titled 'Select Subject Area' and features a search bar with the placeholder 'Search Subject Areas...'. Below the search bar, it says 'Type to search subject area...'. Under the heading 'Results', there is a list of subject areas with their IDs and names: 'ABR-4130 Univ of Salzburg-Austrias', 'ABR-5011 Individual Arrangement', 'ACCT-2000 Acct Concept Non-Bus Stdt', 'ACCT-2210 Acct & Bus Concepts I', and 'ACCT-2220 Acct & Bus Concepts II'. On the right, a 'PREVIEW' section shows the appointment details for 'Sandy Antonio' at 'Math Center (West Campus)' with 'Computer Use' selected. Below the preview, there is a 'Start over' button and a 'Having trouble?' section with links for 'New by Staff Member', 'New by Date', 'Wizard', and 'Manual'.

5. **Select Professor:** In this field you select the professor you want to assign to the appointment. **(You can select None/Skip)**

The screenshot shows the 'New Appointment' form. On the left, a vertical progress bar indicates the steps: Student, Center, Service, Subject Area, Professor (selected), Pick a Slot, and Confirm. The main content area is titled 'Select Professor' and features a list of professors with their names and profile pictures: Sharon Agee, Vidhu Aggarwal, Joshua Almond, Anna Alon, Charles Archard, James Armstrong, and Nathan Arrowsmith. On the right, a 'PREVIEW' section shows the appointment details for 'Sandy Antonio' at 'Math Center (West Campus)' with 'Computer Use' and 'ABR-4130 Univ of Salzburg-Austrias' selected. Below the preview, there is a 'Start over' button and a 'Having trouble?' section with links for 'New by Staff Member', 'New by Date', 'Wizard', and 'Manual'.

6. **Available Slots:** In this field you select a tutor either by looking for them in the scroll down menu **"Specific Tutor"** or you scroll down and manually look for them. You can select the **Days of the Week**, **Duration**, and the **Date and Time** you want to schedule the appointment for.

The screenshot shows the 'New Appointment' form. On the left is a vertical sidebar with steps: Student, Center, Service, Subject Area, Professor, Pick a Slot (highlighted with a blue circle), and Confirm. The main area is titled 'Available Slots'. It includes a 'Specific Tutor' dropdown menu showing '- Any available tutor -'. Below this are 'Days of Week' checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, and Sat, all of which are checked. The 'Pick date and time' section shows a 'Duration' of 15 minutes and a calendar view for 'Showing this week'. The calendar highlights 'FRIDAY, AUG 31' and 'SATURDAY, AUG 31'. A preview of the selected slot shows a tutor named 'Renatta Deffenbaugh' with a time slot of 4:30 PM to 5:00 PM. On the right, a 'PREVIEW' section shows the appointment details for 'Sandy Antonio' at the 'Math Center (West Campus)' for 'Computer Use' on '10/24/2024' at '10:00 AM'. A 'Start over' button is also present.

7. **Confirm:** In the final step to creating an appointment there is an option to **Setup Recurrence**, add attachments, add **Notes**, **Review Details**, and **Confirm** everything is correct (continue reading the next chapter for more information).

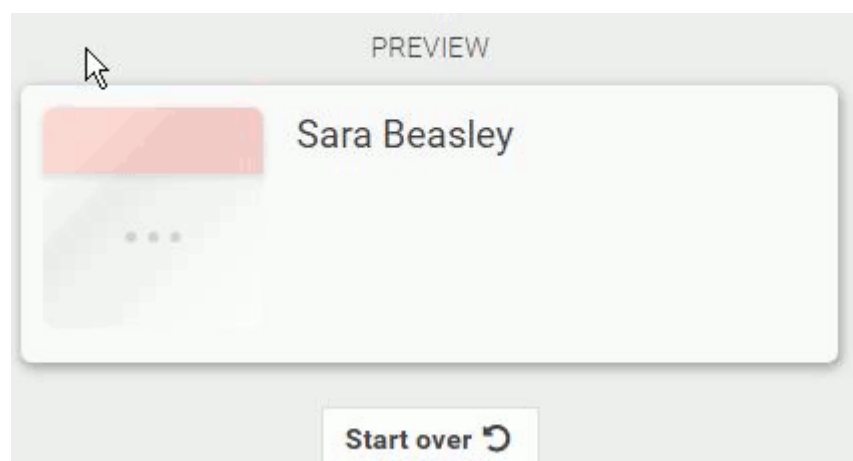
The screenshot shows the 'New Appointment' form in the 'Confirm' step. The sidebar on the left shows the 'Confirm' step highlighted. The main area is titled 'You're Almost Done!'. It includes a 'Recurrence' section with a 'Setup Recurrence' button. Below this is a 'Notes' section with a text area for 'Type to add notes to the appointment...' and an 'Attach' button. The 'Review Details' section shows a preview of the appointment for 'DEC 11 FRIDAY' at '3:30-3:50 PM' for 'Gladys Perez' at the 'Marketing Center' for 'marketing tutoring' and 'Applied Calculus' by 'Juliet T Garcia'. A red bar at the bottom of the preview says 'PREVIEW - NOT CONFIRMED YET'. At the bottom of the form are two buttons: 'CONFIRM' and 'Discard and Start Over'. On the right, a 'PREVIEW' section shows the appointment details for 'Marketing Center' for 'online marketing sessions' and 'Administrative Office Procedures' on '10/24/2024' at '10:00 AM'. A 'Start over' button is also present.

This short video shows all steps as an example:

The screenshot shows the 'New Appointment' form in the 'Select Student' step. The sidebar on the left shows the 'Select Student' step highlighted. The main area is titled 'Select Student' and includes a search bar with the text 'Search students...' and a 'Continue' button. Below the search bar is a green arrow pointing to the text 'Type to search student...'. On the right, a 'PREVIEW' section shows the appointment details for 'Marketing Center' for 'online marketing sessions' and 'Administrative Office Procedures' on '10/24/2024' at '10:00 AM'. A 'Start over' button is also present. At the bottom of the form, there are buttons for 'New Message', 'New Text Message', 'Inbox', and 'Chat'.

As you go through each step a preview on the right side updates as well, so you can check your

progress.



The **Having Trouble?** section on the right side of the page allows you to **create new appointments** with different methods.

Having trouble?

Try one of these methods instead:

- [New by Staff Member](#)
- [New by Date](#)
- [Wizard](#)
- [Manual](#)

Adding attachments

When creating an appointment, in the last step we have the option to add attachments, single files , max files size is 10MB and file types: .doc, .docx, .odt, .tex, .pdf, .xls, .xlsx, .jpg, .jpeg, .png, .ppt, .pptx, .psd, .txt, .mp3, .csv, .ods, .mp4, .mov, .mkv, .avi, .3gp, .mpg, .mpeg, .zip, .rar, .7z . See a small video on how to add attachments.

The screenshot shows the 'You're Almost Done!' screen for creating a new appointment. On the left is a vertical progress bar with steps: Student, Center, Service, Term, Subject Area, Instructor, Pick a Slot, and Confirm (the last step is active). The main content area includes:

- Recurrence:** A button labeled 'Setup Recurrence'.
- Notes:** A text input field with the placeholder 'Type to add notes to the appointment...' and an 'Attach' button below it.
- Review Details:** A preview card for an appointment on **DEC 11 FRIDAY** at **3:30-3:50 PM**. The details include:
 - Gladys Perez** (Instructor)
 - Marketing Center** (Location)
 - marketing tutoring** (Subject)
 - Applied Calculus** (Subject)
 - Juliet T Garcia** (Instructor)
 A red bar at the bottom of the preview card reads 'PREVIEW - NOT CONFIRMED YET'.
- At the bottom are two buttons: a green 'CONFIRM' button and a blue 'Discard and Start Over' link.

On the right side, there is a message about file attachments (max 10MB, various formats) and a 'Having trouble?' section with links: 'New by Staff Member', 'New by Date', 'Wizard', and 'Manual'.

The bottom navigation bar includes 'New Message', 'New Text Message', 'Inbox', and a 'Chat' button.

Setting recurrent appointment

When creating an appointment, in the last step we have the option to create a recurrent appointment, this is an appointment that takes place at specific dates/intervals, for example, "Every Tuesday at 9:00 AM for 20 minutes"

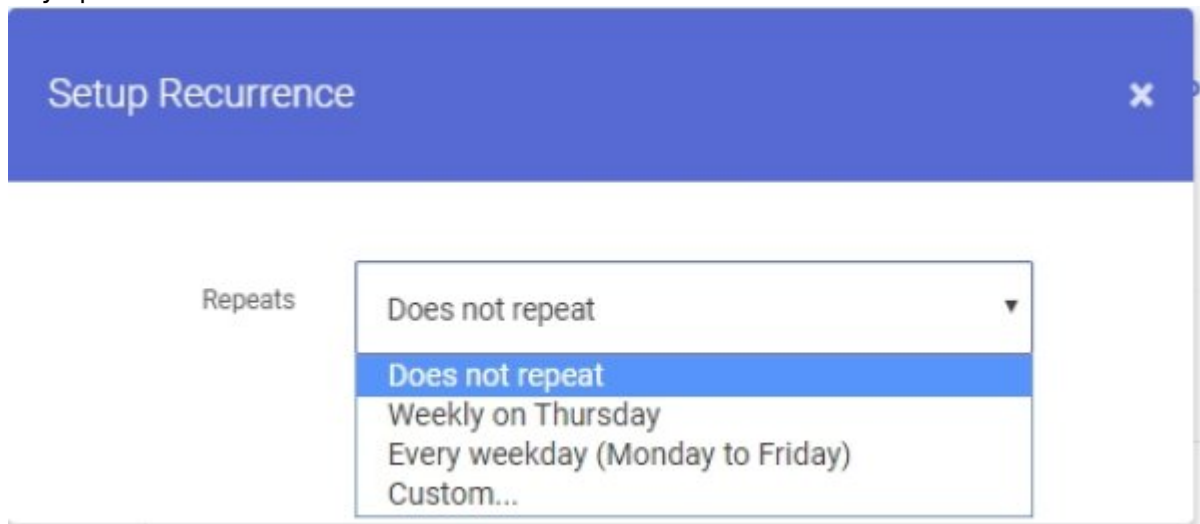
In order to see the options click in "Setup recurrence":

The screenshot shows the 'Setup Recurrence' dialog box. It includes:

- Recurrence:** A yellow button labeled 'Setup Recurrence'.
- Notes:** A text input field with the placeholder 'Type to add notes to the appointment...'.
- Review Details:** A preview card for an appointment on **SEP 17 THURSDAY** at **8:30-8:45 AM**. The details include:
 - Gladys Perez** (Instructor)
 - Computers Lab center II** (Location)
 - online tutoring** (Subject)
 - CAD/CAM** (Subject)
 - Pedro T Gonzales** (Instructor)
 A red bar at the bottom of the preview card reads 'PREVIEW - NOT CONFIRMED YET'.
- At the bottom are two buttons: a green 'CONFIRM' button and a blue 'Discard and Start Over' link.

Select when this appointment will repeat, the option is: either on a specific day of the week or a set of

days per week:



Setup Recurrence

Repeats

Does not repeat

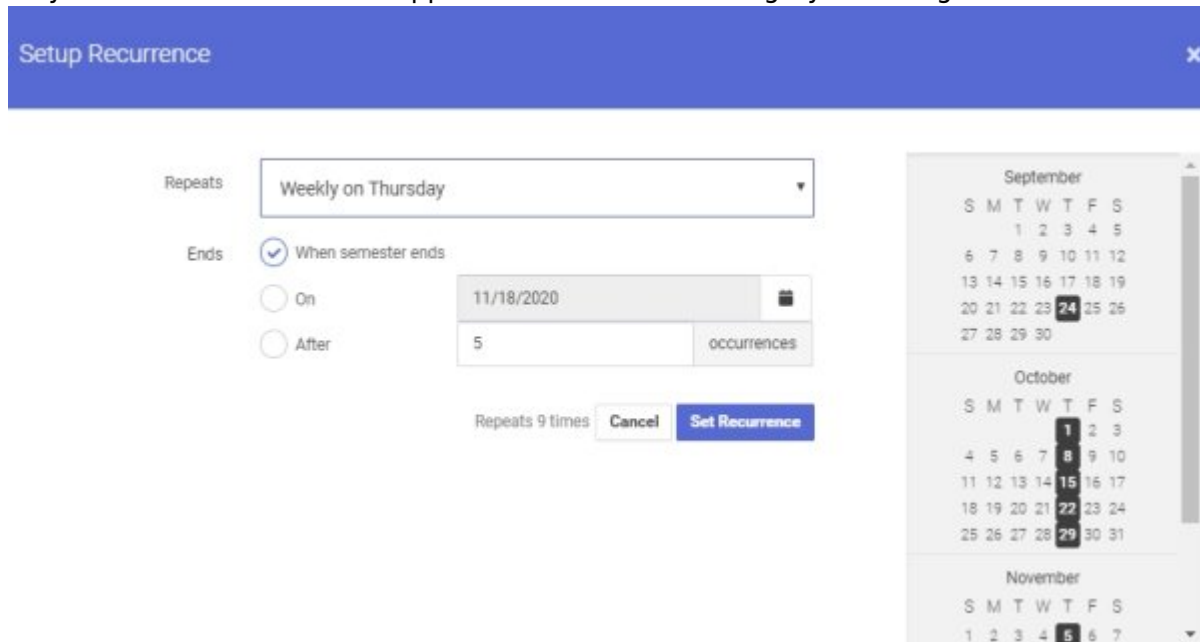
Does not repeat

Weekly on Thursday

Every weekday (Monday to Friday)

Custom...

As you can see the resultant appointments are shown in grey to the right:



Setup Recurrence

Repeats

Weekly on Thursday

Ends

☒ When semester ends

☐ On

☐ After

11/18/2020

5 occurrences

Repeats 9 times

Cancel

Set Recurrence

September

S M T W T F S

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30

October

S M T W T F S

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30 31

November

S M T W T F S

1 2 3 4 5 6 7

When we are done selecting we can see a list of dates when the appointment will occur, if it is ok we can click "Confirm" to create the group of appointments.

Setup Recurrence

Repeats

Every weekday (Monday to Friday)

Ends

☒ When semester ends

☐ On

☐ After

11/18/2020

5

occurrences

Repeats 45 times

Cancel

Set Recurrence

September

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

October

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November

S	M	T	W	T	F	S
1	2	3	4	5	6	7

[Previous Article - Appointments](#) | [Back to Tutor Manual](#) | [Next Article - View All Appointments](#)

From:
<https://attendance-tracking.com/docs/> - **Engineerica Documentation**

Permanent link:
<https://attendance-tracking.com/docs/doku.php/accudemia/7/tutor/manual/c-a/appointments/new>

Last update: **2020/12/09 09:22**

