

## Introduction

This guide is a companion to the LibCal Appointments customization steps. With this guide, you will be able to update Outlook account settings for receiving consultation meetings on your outlook calendar, update your available hours for LibCal Appointments, learn about several options available to promote the LibCal Appointments service, and learn how incoming appointment requests will be received by the subject specialist.

Subject Specialists: <https://www.library.illinois.edu/geninfo/subject-specialists/>

LibCal Appointments login: <https://uiuc.libcal.com/admin/appointments>

Rather than create step-by-step instructions, we've outlined a series of tasks to set up and share your calendar with links to the detailed instructions from Springshare.

These include:

- Set up Outlook calendar integration
- Choose your availability
- Select appointment settings
- Set up your appointment booking form
- Set notification preferences
- Share your calendar
- Receive and change appointments

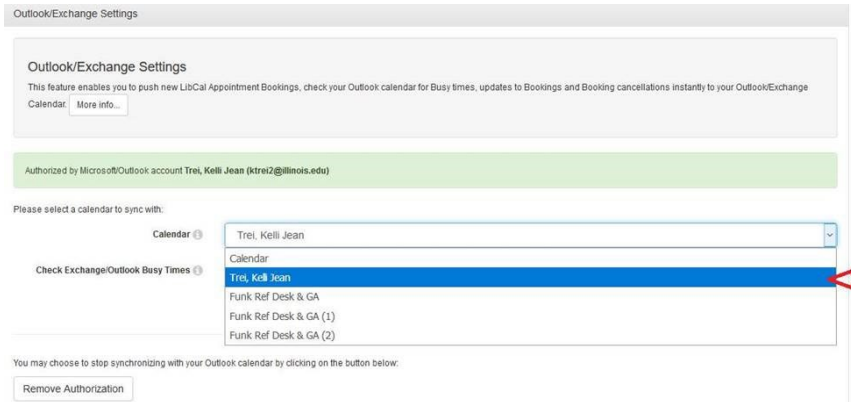
## Set up Outlook Calendar Integration

[Get full instructions from Springshare](#)

LibCal can read your Outlook calendar and use this information to share your availability on your public calendar.

Get started at LibCal > Appointments > Integrations > Outlook/Exchange Settings.

Note: If you have shared calendars in Outlook, make sure you've selected the calendar that is just your name.



The screenshot shows the 'Outlook/Exchange Settings' page. At the top, there's a section for 'Outlook/Exchange Settings' with a 'More info...' link. Below that, it says 'Authorized by Microsoft/Outlook account: Trei, Kelli Jean (ktrei2@illinois.edu)'. The main section is 'Please select a calendar to sync with:'. It has a 'Calendar' dropdown menu currently set to 'Trei, Kelli Jean'. Below the dropdown is a list of calendars: 'Trei, Kelli Jean' (highlighted in blue), 'Funk Ref Desk & GA', 'Funk Ref Desk & GA (1)', and 'Funk Ref Desk & GA (2)'. A red arrow points to the 'Trei, Kelli Jean' option. At the bottom left, there is a 'Remove Authorization' button.

Select your calendar to sync

## Choose Your Availability

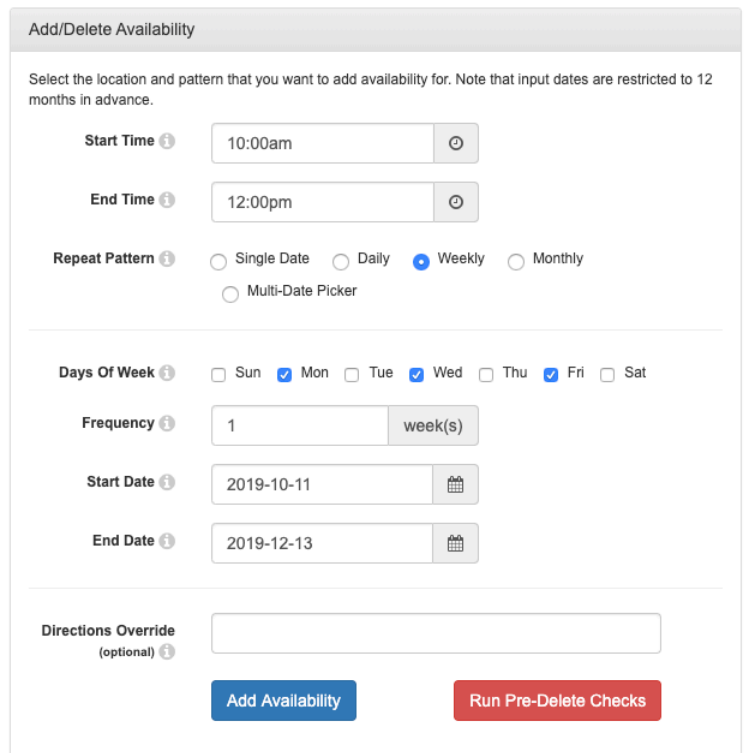
[Get full instructions from Springshare](#)

Tell LibCal what times you want to be available for appointments (unless you are already scheduled in Outlook).

Get started at LibCal > Appointments > Availability.

Choose a start and end time, and how often that availability should repeat.

For example, you may say you're available from 10-12pm Mondays, Tuesdays, and Fridays, every week by choosing to repeat weekly and selecting those days (as in the example to the right).



The screenshot shows the 'Add/Delete Availability' form. It has a title 'Add/Delete Availability' and a subtitle 'Select the location and pattern that you want to add availability for. Note that input dates are restricted to 12 months in advance.' The form contains several fields: 'Start Time' (10:00am), 'End Time' (12:00pm), 'Repeat Pattern' (Single Date, Daily, Weekly, Monthly, Multi-Date Picker), 'Days Of Week' (Sun, Mon, Tue, Wed, Thu, Fri, Sat), 'Frequency' (1 week(s)), 'Start Date' (2019-10-11), and 'End Date' (2019-12-13). There is also a 'Directions Override (optional)' field. At the bottom, there are two buttons: 'Add Availability' and 'Run Pre-Delete Checks'.

Tell LibCal when you'll take appointments

## Select Appointment Settings

[Get full instructions from Springshare](#)

Use LibCal > Appointments > My Settings to specify:

- How long appointments should last (duration)
- How long you want to have between concurrent appointments (padding)
- How far out patrons must book or cancel their appointment
- How far out they can schedule an appointment (booking window)

The screenshot shows the 'Appointment Settings' section of a web interface. It features a grey header with a dropdown arrow and the text 'Appointment Settings'. Below the header are five settings, each with a colored dot on the left and an information icon on the right:

- Appointment Duration** (red dot): 60 minutes
- Appointment Padding** (yellow dot): 0 minutes
- Patron Must Book In Advance** (green dot): 24 hours before Appointment
- Patron Can Cancel Appointment** (light green dot): 0 hours before Appointment
- Patron Booking Window** (purple dot): 2 months

## Set Up Your Appointment Booking Form

[Get full instructions from Springshare](#)

By default, patrons will be asked to include their name and email when they make an appointment.

You can also choose to ask them to include other information through LibCal > Appointments > My Settings > Appointment Form Questions

## Set Notification Preferences

[Get full instructions from Springshare](#)

In your appointment settings at LibCal > Appointments > My Settings you can also choose whether patrons receive a reminder email about their appointment, and when they receive the reminder.

Further down the page, you can make specific updates to their confirmation and reminder emails to include important information, such as where patrons should plan to meet you.

## Share Your Calendar

Set a friendly URL for your appointment book page using the settings in LibCal > Appointments > My settings

Once your calendar is set up, a link to the scheduler will appear with your contact information on your contact page on the library website.

### Friendly URL ⓘ

<https://uiuc.libcal.com/appointments/>

friendly url

Share this URL to your booking page

## Receive and Change Appointments

### [Get full instructions form Springshare](#)

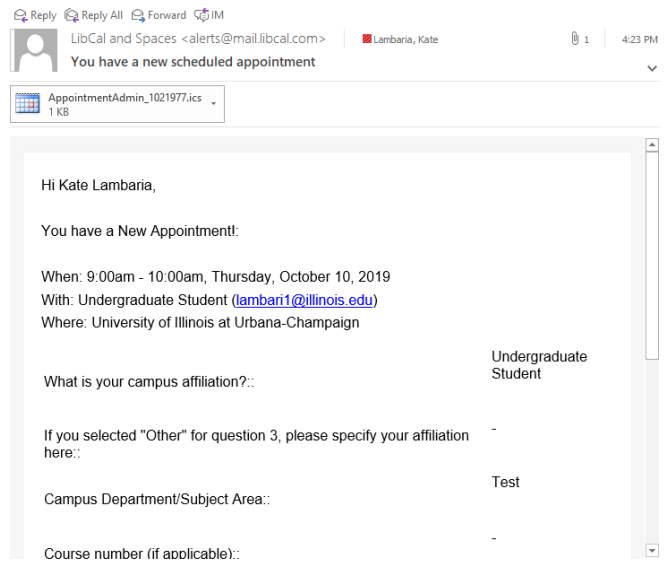
When someone schedules an appointment with you, you'll get an email from [alerts@mail.libcal.com](mailto:alerts@mail.libcal.com), with the information the patron provided on the booking form.

The appointment will be automatically added to your Outlook calendar.

You'll also receive an email if the patron cancels their appointment






If you need to cancel or change an appointment, go to LibCal > Appointments > My Appointments.

Deleting the appointment from your Outlook calendar will not cancel it for the patron.



Example appointment received email

### Patron

**Full Name:** Test Patron   
**Email:** [jhagman@illinois.edu](mailto:jhagman@illinois.edu)  
**When:** 2:00pm - 3:00pm Friday, October 11, 2019    
**Location:** University of Illinois at Urbana-Champaign  
**Internal Notes:**   
**User Showed Up?**  Yes  No  
**would you like to tal...** My research project  
**are interested in di...** -  
**Submitted:** 10:26am Friday, October 11, 2019  
**Reminder:** To be sent @ 12:00pm Friday, October 11, 2019  
**Follow-up:** To be sent @ 3:00pm Friday, October 18, 2019 

Click here to cancel the appointment