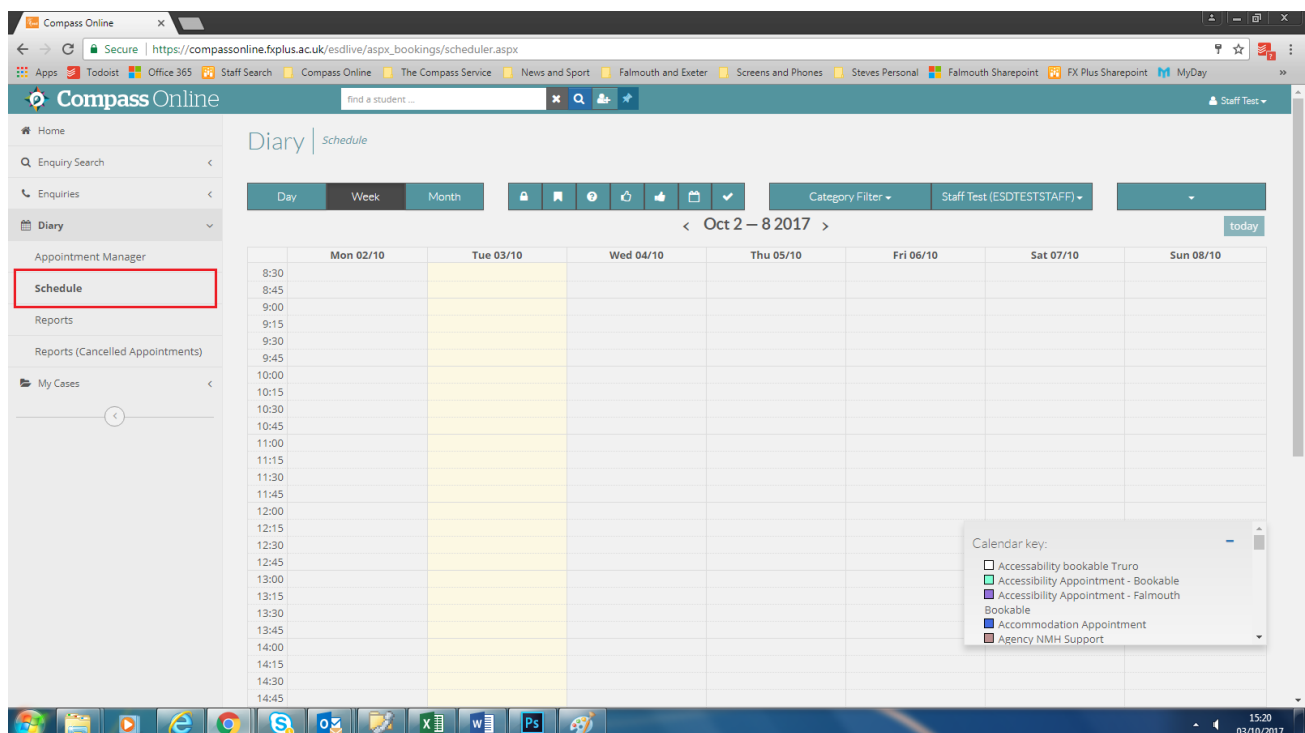


# How to: View availability and book an appointment in The Compass Rooms/ Hub 6 using Compass Online

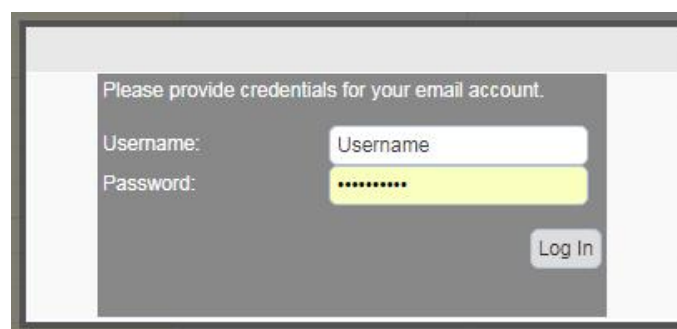
## Overview:

This guide demonstrates how you should book an appointment in in to one of the available Compass rooms or Hub 6 at Falmouth Campus using Compass Online. Using Compass Online you can now see what slots are available,

1. Login in to Compass Online at <https://compassonline.fxplus.ac.uk>. This will take you to your profile page. **Please note:** If you experiencing problems logging in to the system please contact [servicedesk@fxplus.ac.uk](mailto:servicedesk@fxplus.ac.uk) or call 01326 213822.
2. Click on **Schedule** from the **Diary** option in the left-hand navigation menu.

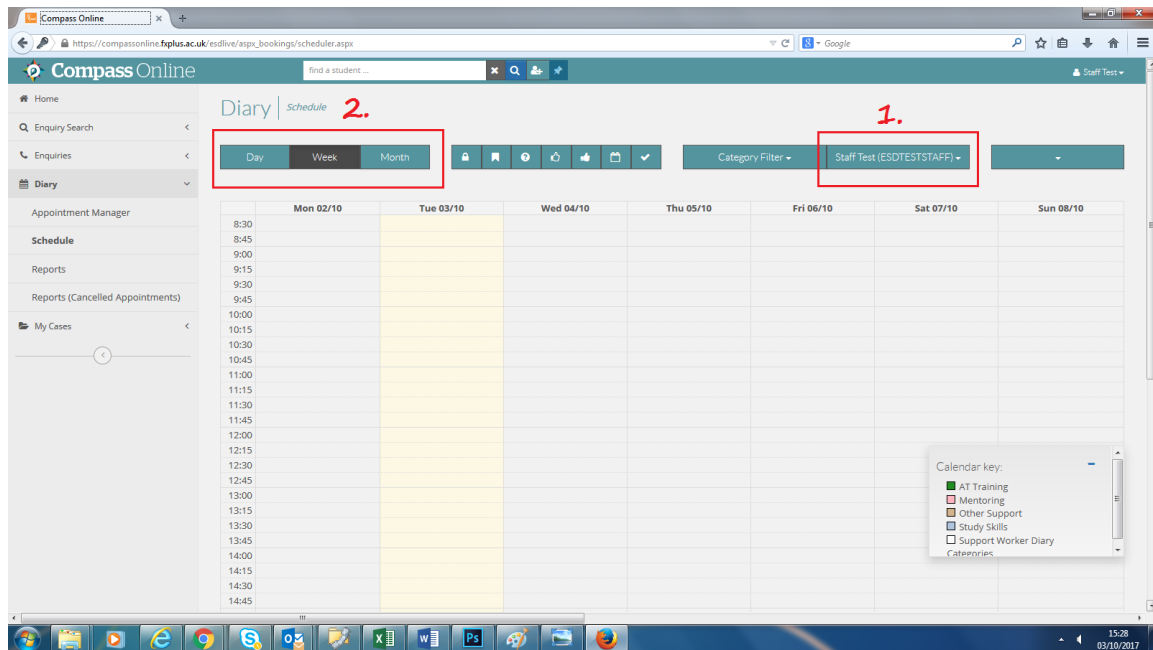


3. A new login pop up will appear – this allows users with a university Outlook inbox to synchronise their calendars. Re-input your username and password to bring up your calendar. Ignore any error messages that may be displayed at this point.

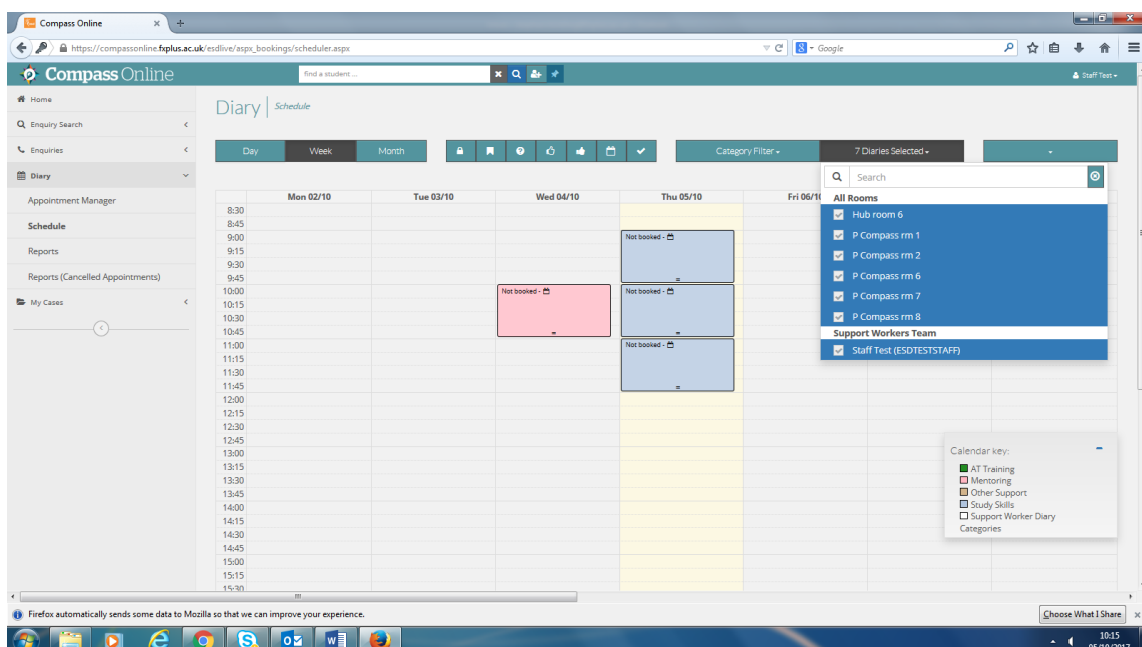


4. As default, Compass Online will display your personal calendar as shown in option **1**. You can view your calendar by Day, Week or Month with the Week view shown as the default view (**2**.)

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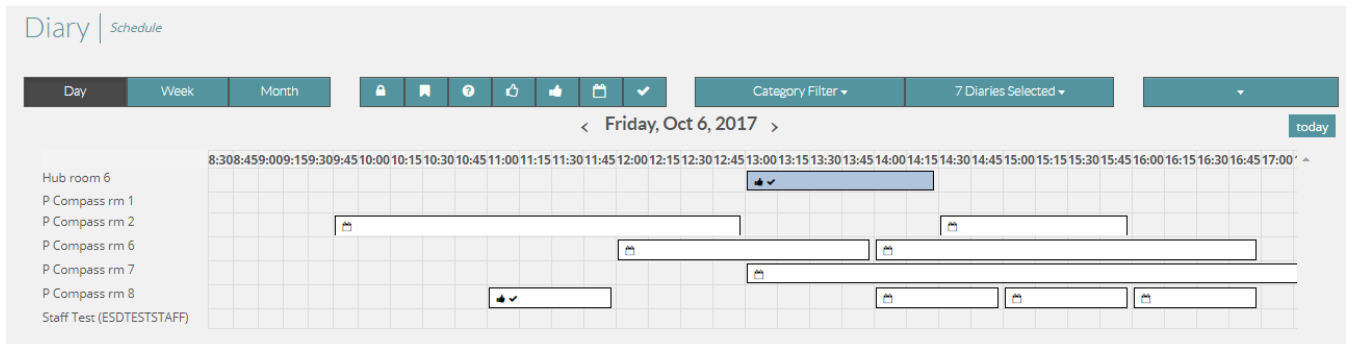


- Each of The Compass rooms and Hub 6 at Falmouth have calendars in Compass Online. To view the calendars for these rooms click on the down arrow next to your name (see instruction 4.1 above). You can select all rooms or each one individually. Rooms currently available to book are: The Compass Rooms 1, 2, 6, 7 and 8 (at Penryn) and Hub 6 at Falmouth.



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- Click back in to the calendar to load the chosen room calendars. Please note: unless unticked, it will also display your individual calendar. Whilst you can view by week and month (see instruction 4.2), view by day provides the clearest view of availability in the rooms.

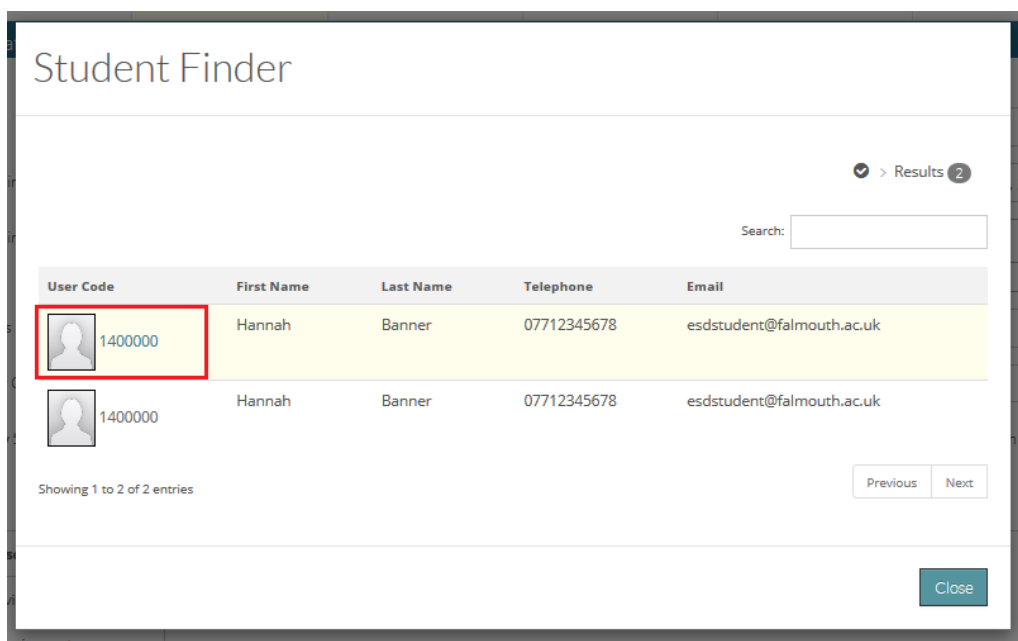


- Each block in the calendar represents a current booking. The white appointments are bookings by other teams. The coloured blocks represent NMH Support Worker Appointments – see instruction 10 below.
- To book an appointment, click at the start time of an available section in one of the room calendars. **\*\*IMPORTANT\*\*** Compass Online will not prompt you if you create a double booking in one of the rooms. Please make sure there is sufficient availability before clicking to book your appointment.
- When you have clicked in the calendar, a pop-up appointment-booking window will be displayed. The pop-up window will provide a list of basic options to book an appointment – you can display **more options** or **fewer options** by clicking in the bottom left corner of the pop-up box.

## How to: **View availability and book an appointment in The Compass Rooms/ Hub 6 using Compass Online**

There are 5 important options that you need to select when booking an appointment:

- a. **Appointment Title** – this is a general overview of the appointment. Within this box type the student's name, the type of session and the location of the appointment. For example:  
**Joe Bloggs – Study Skills – The Compass Room 1**
- b. **Enquiry Category** – the type of session you are booking with the student. Choose from **Study Skills, Mentoring, AT Training, Other Support**.
- c. **Enquirer (student name)** – You will need to add the name of the student to the appointment. Click on the **Look up student** button and search using the fields available. Click on the student's usercode to display their name in the appointment. **Please note:** There are two records displayed for the same student – this is perfectly normal and it doesn't matter which option you select:



- d. **Appointment Start, End and Duration** – depending on where you selected in your calendar, the system will begin the appointment at that time. By default, it will create an appointment of 1 hour however you can change the slot length here.
- e. **Staff** – IMPORTANT: as you are booking the appointment in a room calendar you MUST select yourself as the member of staff for the appointment. Click **Add Staff > Select a staff member** and select your name from the list. Click **Select and close**.

## How to: View availability and book an appointment in The Compass Rooms/ Hub 6 using Compass Online

10. Select **Create Appointment**. The appointment will be added to the room calendar (1) and your own calendar (2). You can hover over the appointment to view the content or click on the appointment to make changes.

Each appointment category (type) is represented by a different colour:

Study Skills, Mentoring, AT Training, Other Support.

11. When you have selected **Create Appointment**, both you (the staff member) and the student will receive an email notification of the appointment. The student's appointment notification will be sent to their university email address.

Should you wish to send the student a confirmation to their personal email address, please view the **How to: Initiate a message to a student using Compass Online** guide.

Hi \*DIARY\_NAME,

This message is confirming your booked support session:

<b>Appointment Type:</b>	*DIARY_CALL_CATEGORY
<b>Staff:</b>	*DIARY_STAFF
<b>Appointment Date:</b>	*DIARY_DATE
<b>Start Time:</b>	*DIARY_START
<b>End Time:</b>	*DIARY_END
<b>Location:</b>	*DIARY_ROOM
<b>Additional Info:</b>	*DIARY_TITLE

I'm looking forward to seeing you then.

Best wishes,  
\*DIARY\_STAFF

12. You can override the automatic email notifications by selecting the appropriate tick-boxes within the appointment-booking pop-up window:

Email generation  ?

Email Type

Check to override system email generation

Staff  Callers

## How to: View availability and book an appointment in The Compass Rooms/ Hub 6 using Compass Online

13. Within the appointment booking, you must select when an appointment is **confirmed** and whether it was **attended** by the student. There are two different icons that are used to represent this.

**Option 1.** Shows whether a student has confirmed the appointment. If you are booking a session for any time in the next 7 days this should be marked **lime green**. For any appointment bookings beyond the next 7 days you must wait until the student has confirmed before selecting this option.

**Option 2.** After the appointment has taken place, you must return to the booking and mark whether the session was attended by the student. **Lime green** represents that the student attended the session.

The screenshot shows the appointment booking interface. Key elements include:  
- Title: Hannah Banner - Study Skills - PL Seminar 6  
- Enquiry Category: Mentoring  
- Appointment Date: Wednesday, 4 October, 2017  
- Enquirer: Search for... (with a 'Look up student' button) and a dropdown showing 'Hannah Banner'.  
- Starts: 10:00 for [Select Length] or until 11:00  
- Diary Category: Select a diary category (with red annotations '1.' and '2.' pointing to the dropdown)  
- Diary Status: A row of icons including a lock, a calendar, a question mark, a thumbs up (lime green with a '1'), and a person icon.  
- Staff: Add staff (1) and Add tutor (0) buttons.  
- Room/event details: No Room and No Event dropdowns.

14. **Please note** that all appointments are recorded against the student's profile. To view the student's appointment history, use the 'find a student' search bar at the top of the screen and click on the **Activity** tab.

The screenshot shows the student profile page for Hannah Banner. The 'Activity' tab is selected, and the 'Appointments' sub-tab is highlighted with a '1' next to it. The table below shows one appointment entry:

Type	Description	Owner	Created	Updated
	04/10/2017 10:00-11:00 Mentoring	Staff Test	03/10/2017 16:04:02	03/10/2017 16:09:00

Showing 1 to 1 of 1 entries

### Further details:

You can pre-book appointment slots before booking a student in to them. To do this simply create the appointment as shown in instruction 9 but do not add any students to the record. When you have identified a student for that particular slot, click to edit and add the student's details as per instruction 9c.

If a student cancels a session, simply edit the appointment and select **Cancel Appointment**. This will provide you with a list of reasons for the cancellation that include: Unable to attend, Appointment clash, No longer required, I intend to reschedule and Cancelled by service.

By selecting this, it will remove the student from the appointment, send both you and the student a cancellation email but keep the slot so that you can book another student in to it.

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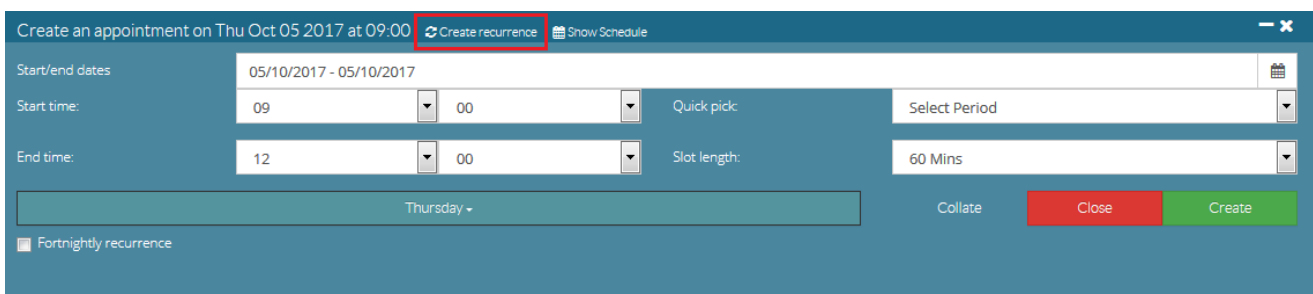
If you wish to remove the slot completely, open the appointment slot and select **Delete Appointment** to remove it from your calendar.

**\*\*IMPORTANT\*\* All rooms are in very high demand – if you can no longer make a session you must cancel as per the instruction above so that the room can be used for other appointments.**

### Multiple (consecutive) sessions

You can book multiple sessions without having to add them one by one. If you plan to see students for a morning (for example, 3 sessions from 9am until 12pm) you can use the appointment recurrence feature to add 3 consecutive 1 hour appointments.

1. Click in to your calendar at the time of the first session to view the appointment creator pop-up window. Select the 'Create Recurrence' option at the top of the window – this will cascade a new set of options over the pop-up appointment window:

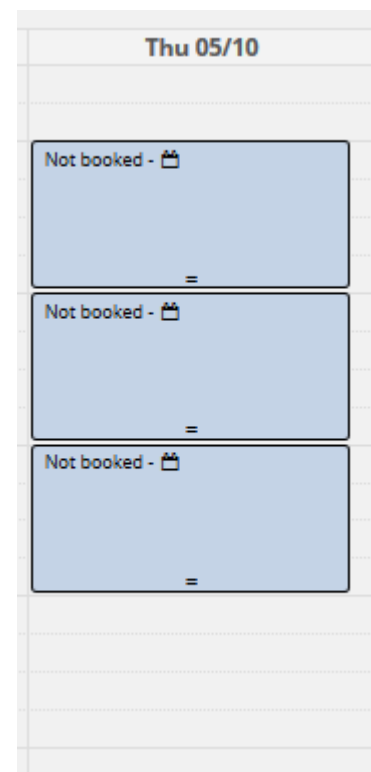


The screenshot shows a 'Create an appointment' window for Thursday, Oct 05 2017 at 09:00. The 'Create recurrence' button is highlighted with a red box. The window includes fields for 'Start/end dates' (05/10/2017 - 05/10/2017), 'Start time' (09:00), 'End time' (12:00), 'Slot length' (60 Mins), and a 'Quick pick' dropdown for 'Select Period'. At the bottom, there are buttons for 'Collate', 'Close', and 'Create', and a checkbox for 'Fortnightly recurrence'.

2. Choose your start and end dates (this should represent the same day), as well as your start time and your end time.
3. Select the length of the slot (in most cases this will be 60 minutes).
4. Importantly, also select which day of the week it is.
5. Select 'collate' (to view how many slots will be created) and **Create** to create the slots.
6. Your slots will be created.
7. You can then select each individual appointment slot to change the settings/ add student details or adjust the category to reflect the type of support you will be giving in that session.

**Please note:** it is only when a student is added to the appointment that the appointment confirmation emails are sent.

Please also be aware that if you make a mistake these slots can only be deleted individually so be cautious when using this option.



The screenshot shows a calendar view for Thursday, 05/10. Three consecutive slots are visible, each labeled 'Not booked' with a calendar icon. The slots are separated by equals signs (=).

## How to: **View availability and book an appointment in The Compass Rooms/ Hub 6 using Compass Online**

### Changing Rooms

If you would like to change a booking within The Compass rooms (depending on availability) or change your booking to a room elsewhere on campus:

#### To change rooms within The Compass.

1. Click on your booking to view the appointment options.
2. Scroll down to the **Room** option and click on the down arrow.
3. To change room within The Compass (or to Hub 6) select the appropriate new room.  
**Please note, as the system does not prompt you if there is already a session booked in the new room you must check the availability before changing room.**  
You should also change the room name within the booking title.

#### To change from The Compass rooms to a room elsewhere.

1. To change from The Compass rooms to a room elsewhere on campus – book your room through the Room Bookings portal or by contacting the Timetabling Team.
2. Click on your booking to view the appointment options.
3. Scroll down to the **Room** option and click on the down arrow.
4. Select **No Room** form the list – this will remove the booking from The Compass rooms calendar but keep the booking in your own calendar.
5. Change the room name within the booking title.

The screenshot displays the Compass Online booking interface. At the top, there is a search bar for the enquirer, with 'Hannah Banner' entered. Below this are fields for 'Starts' (09:00) and 'or until' (10:00), along with 'Diary Category' and 'Diary Type' dropdowns. The 'Diary Status' section includes icons for lock, bookmark, help, thumbs up, and user. The 'Staff' section has 'Add staff' (1) and 'Add tutor' (0) buttons. The 'Room/event details' section features a dropdown menu currently set to 'P Compass rm 1'. This dropdown menu is highlighted with a red box and contains the following options: 'P Compass rm 1', 'Select a room', 'No Room', 'Hub room 6', 'P Compass rm 1', 'P Compass rm 2' (highlighted in blue), 'P Compass rm 6', 'P Compass rm 7', and 'P Compass rm 8'. A 'No Event' dropdown is also visible to the right.

Please be aware that any changes made to the booking will generate an update to the student's email address.