Microsoft Teams FAQs

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Setting Up the Microsoft Teams Integration

Q: How much does the Teams integration cost?

A: Nothing additional on pickAtime’s part, but the integration does require a paid Teams account.

Q: Do my teachers have to sync their Outlook calendars?

A: Yes, teachers have to sync their Outlook calendar to use the Microsoft Teams option.

Q: When I sync my calendar, do I have to allow all of the permissions?

A: Yes, to sync your calendar to utilize the Teams Integration, you have to accept all permissions and select which of the Microsoft Calendars you want to connect to.

Q: Can I add my integration retroactively?

A: Yes, you can do the integration after the event closes. Make sure that you alert parents so that they are aware, and the links will be included in the Printable PDF within the reminder email.

Configuring Virtual Appointments

Q: Why aren’t my virtual meeting links appearing?

A: For the links to appear, the slots must be Virtual or Virtual/In-Person. Please update your slots to either the Virtual or the In-Person/Virtual option for your parents.

To update the slots:

1. On the Settings/Admin View Settings tab, check the box **Show the "Appointment type" dropdown**.
2. On the Appointments tab, select the date on the calendar, then click **Slots > Update Slots**.
3. Select the appropriate slot appointment type (Virtual or In-Person/Virtual) and click **OK**.

If you previously added Services or Appointment Fields to collect appointment choices from parents, you can remove them if they are no longer needed:

- To remove Services, click the red X to the left of each Service.
- To remove Appointment Fields, select the field and click the right-hand arrowhead to remove it.

Q: Can there be two virtual hosts?

A: No, there can be only one host.

Q: How do I change the host?

A: For a team of teachers, the system will select the first teacher as the host/lead teacher. The other teachers and parents will then be guests.

To change the lead teacher:

1. Add the new lead teacher to the team, if they are not already a member.
2. Remove the other teacher(s) from the team.
3. Allow Google to update the change (approximately 40 minutes).
4. Re-add the other team members.

Q: Our event is already set up, and appointments have been booked. Can we add virtual meeting links to the Virtual Room column retroactively?

A: Yes! You can add virtual meeting links to an existing event, even after appointments have been booked.

If you have already added the meeting links to the teachers' contact accounts, you will need to import the Class File to transfer those links into the event.

To add the links to an existing event:

1. Make sure the teachers' contact accounts have the correct meeting links in the **Virtual Room** field.
2. Make sure the event is configured for virtual appointments. Go to **Events Management > Settings > Admin View Settings** and enable **Show the "Appointment Type" dropdown**, if it isn't already enabled.
3. On the **Appointments** tab, select the appointment dates and use **Slots > Update Slots** to set the appointment type to **Virtual** or **In-Person/Virtual**, as appropriate. When doing this, ensure that the box "*Keep existing slot type on slots being updated*" is **checked**.
4. Import the event's updated **Class File**. This step transfers the virtual meeting links from the teachers' contact accounts into the event.
5. Return to the **Appointments** tab and verify that the links appear in the **Virtual Room** column.

Important: Make sure you have not enabled a virtual meeting integration under **Online Scheduler Settings > Advanced Settings**. When an integration is active, it manages the meeting links and overrides manually entered links.

Once the links have been added to the event, they can be included in appointment reports and notifications.

Managing Virtual Meeting Links

Q: How long does it take for the links to be generated?

A: It can take up to 40 minutes for a new link to be generated and added to the reports.

Q: I don't want to use an integration or import my teachers' Teams links. Can I add them manually?

A: Yes. You can add meeting links directly on the Appointments tab in the list of teachers. Double-click in the **Virtual Room** column to edit or paste the teacher's meeting link.

Q: I added Virtual links to the Virtual Room column, but they aren't appearing in the reports after someone books, and the links have disappeared. Why?

A: Check **Online Scheduler Settings > Advanced Settings**. You will see that the Teams integration has been set up.

If you disable the integration, the links you added manually will appear.

Q: Can I add the virtual link to the calendar invites?

A: Yes. Before opening the event, navigate to **Event Management > Settings > Notification Setup > Calendar Event Notification**.

1. Click **Insert Macros**.
2. Under the Appointment section, add the **Room** macro to the Description section of the notification.

Sharing Meeting Links with Parents and Teachers

Q: Will teachers log in to pick a time to get the link to their virtual conference, or does it create a meeting with a link on their calendar?

A: Teachers can sign into pickAtime to view their schedules and meeting links by navigating to **Reports > Event Reports > Teachers Schedule**.

Q: Can multiple people receive the links?

A: The links are included in the Printable PDF sent with Confirmation and Reminder emails. These emails are sent only to the appointment maker. However, the appointment maker can forward the emails to anyone they wish to share the links with.

Q: Once I add my virtual links or virtual integration to my event, do I need to do anything to my emails to ensure that parents receive the information?

A: Make sure that the **Printable Schedule of Appointments** is activated for your Confirmation and Reminder emails in Notification Setup.

To check this setting:

1. Go to **Event Management > Settings > Notification Setup**.
2. Open the Confirmation and Reminder email settings.
3. Select **Replace the Email Body with the Printable Schedule of Appointments**.

The Printable Schedule of Appointments includes the required macro and formatting to display virtual meeting URLs.

Troubleshooting

Q: The Help Center references a Virtual Room column on the Appointments tab, but I don't see it. Why?

A: First, make sure your event has Virtual or In-Person/Virtual appointment slots.

To update the slots:

1. On the Settings/Admin View Settings tab, check the box **Show the "Appointment type" dropdown**.
2. On the Appointments tab, select the date on the calendar.
3. Click **Slots > Update Slots**.
4. Select Virtual or In-Person/Virtual and click **OK**.

Next, check that the Teams integration has not already been activated:

1. Go to **Online Scheduler Settings > Advanced Settings**.
2. Make sure the integration dropdown is empty.

Q: I have a user who can't get into the pickAtime system from Entra ID. What should I check?

A: Check that the user exists in both the pickAtime and Entra databases.