

# Getting started with Calendly: Guide for Academic Staff

Calendly is a new scheduling tool designed to simplify the process of booking meetings with students.

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## Step 1: Access your Calendly account

Please contact Helpdesk – [helpdesk@up.education](mailto:helpdesk@up.education) to request to be added as a Calendly user.

If you have already been added as a Calendly user. Find your Calendly invitation in your email inbox and click **Accept Invitation** to get started.



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Calendly is a simple, elegant scheduling tool that lets people schedule with you in just a few clicks—no tedious back-and-forth required. Click below to accept the invitation and you'll be up and running in a matter of minutes.

Accept Invitation

Follow the prompts to activate your login. Once you have confirmed your login, you will be directed to your Calendly Home page.

Please contact the Helpdesk – [helpdesk@up.education](mailto:helpdesk@up.education) – if you have not received your Calendly invitation.

## Step 2: Set up your profile

At the top of your Calendly home page, select **Account** then **Account Settings**.

From here you can upload a profile photo, add a welcome message, set your time zone and time and date format.

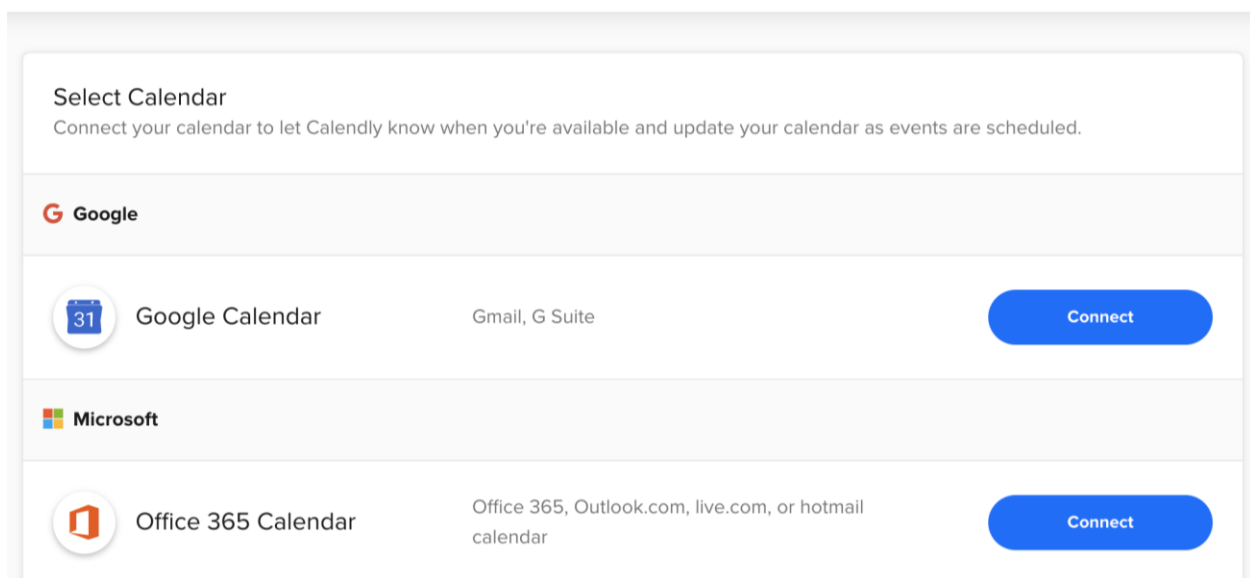
## Step 3: Sync your Microsoft Outlook calendar with Calendly

Your Microsoft Outlook calendar will automatically connect with Calendly when you sign up.

If your calendar does not sync automatically:

Log in to Calendly, go to **Account** at the top of the page, then select **Calendar Connections** from the dropdown.

Next to Office 365 Calendar, select **Connect**. You will be prompted to authenticate your account. You will then be automatically redirected back to **Calendar Connections**.



## Step 4: Add video conferencing in Calendly

Calendly is automatically integrated with your Zoom account, which means that the Zoom option is available to be selected as a **Location** when setting up a new **Event** or updating an existing **Event**.

When a student books a meeting with you, both you and the student will automatically receive all the video conferencing details (including your Zoom link). These will be sent **via email** and will also appear in your Calendly Scheduled Events.

If your Zoom account **does not** integrate automatically, you will get the error message shown below.

What event is this?  
One-on-one student meeting, Zoom

Event name \* ⓘ

One-on-one student meeting

Location ⓘ

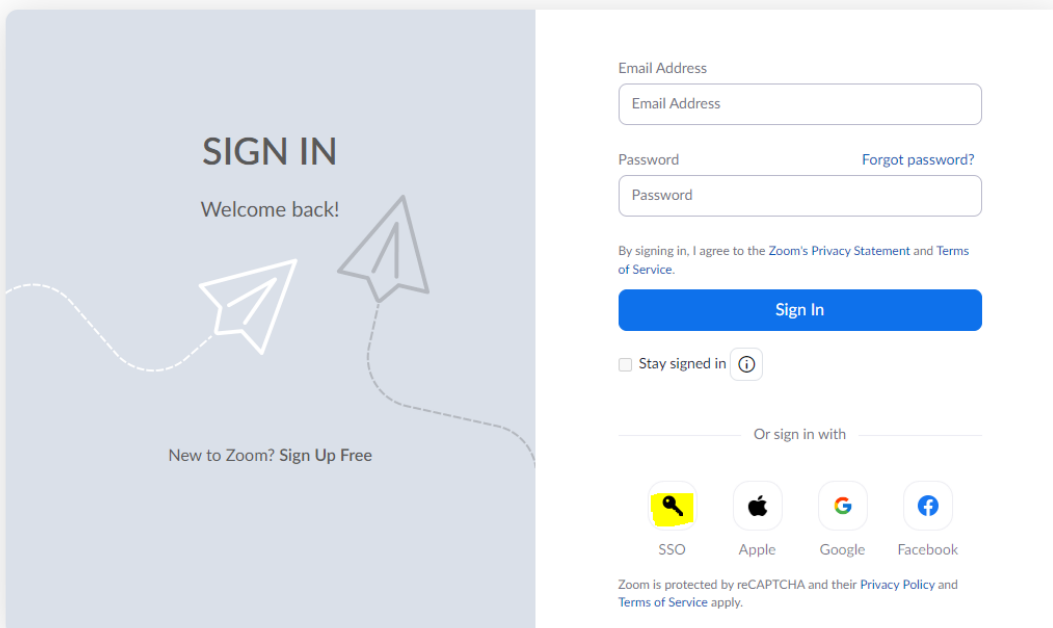
Zoom

Edit



Zoom is not connected. Visit the [Zoom integration page](#) to connect your account.

Go to <https://up-education.zoom.us/>. Select **SSO** underneath the sign-in box.



The image shows a Zoom sign-in page. On the left, there is a blue background with the text "SIGN IN" and "Welcome back!". Below this, there are two paper airplane icons and the text "New to Zoom? Sign Up Free". On the right, there is a white background with a sign-in form. The form includes fields for "Email Address" and "Password", a "Forgot password?" link, and a blue "Sign In" button. Below the button, there is a checkbox for "Stay signed in" and a link to "Or sign in with". Underneath, there are four icons for "SSO", "Apple", "Google", and "Facebook". At the bottom, there is a small disclaimer: "Zoom is protected by reCAPTCHA and their Privacy Policy and Terms of Service apply."

Enter **up-education** as the company domain and click **Continue**.

### Sign In with SSO

Company Domain

up-education .zoom.us

Continue

I don't know the company domain

< Back

Once you have signed into your Zoom account, select **Authorize** to let Calendly access your Zoom account.

If you are still unable to connect your Zoom account to Calendly, please contact the Helpdesk – [helpdesk@up.education](mailto:helpdesk@up.education).

## Step 5: Set your availability

1. Log in to Calendly and select **Availability** from the navigation menu at the top of the page.
2. Define your availability by selecting or deselecting the days and times that you are available for student meetings. You can add more time intervals by clicking on **+** and manually adding a new time frame.

**Working hours** ⚙️  
 ★ default schedule

ACTIVE ON: 1 Event Type ▾    TIME ZONE: Auckland Time ▾

List view    Calendar view

---

**Set your weekly hours**

**SUN**    Unavailable    +    🗑️

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**MON**

9:00am - 11:00am    🗑️    +    🗑️

3:00pm - 4:15pm    🗑️

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**TUE**

9:00am - 5:00pm    🗑️    +    🗑️

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**WED**

9:00am - 5:00pm    🗑️    +    🗑️

**Add date overrides**

Add dates when your availability changes from your weekly hours

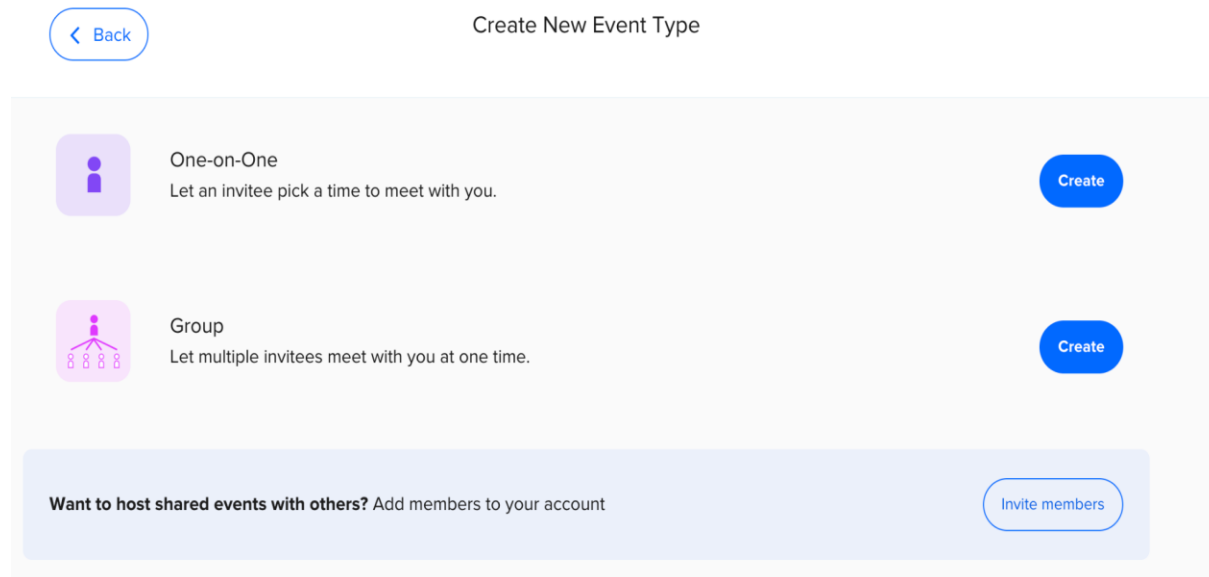
Add a date override

3. To block out times on specific days in your calendar, click **Add a date override**. Date overrides are for times that do not follow a pattern, like annual leave days for example.
  
4. Note: you will need to block out public holidays in your calendar, if and when they fall on a weekday, as these will not automatically show as date overrides.

## Step 6: Create a new meeting ('event') type

Your default 'event' type is set to **30-minute one-on-one meetings**. Follow the below steps if you want to add additional meeting types, for example group meetings.

1. Log in to Calendly. Go to your Calendly **dashboard**, then select **+Create**. Select **Event type** from the dropdown.
  
2. Select **Create** next to the type of meeting you want to create.




3. Give the event a name, select a location from the dropdown (for example add Zoom as a location), then select **Next** at the bottom of the page.
4. Complete the box called **When can people book this event?** Choose the **Date Range** (specify dates within which you can accept meetings), **Duration** (for example 15 mins, 30 mins), the **Schedule** you want to use, and any buffer time you want to block out (i.e. 10 minutes before a meeting to allow for prep). **Save & Close.**
5. Below this there is a link in blue [Additional rules for your availability](#). Under here you can specify **Start time increments**, **Scheduling Conditions** (this is important if you do not want students to be able to schedule meetings within 24 hours, for example), Time Zone Display, and an additional option to create a **Secret Event**.

## Optional: Workflows

Under **Additional Options**, there is an additional handy function called **Workflows** where you can automate tasks that connect to this event, for example, email or text meeting reminders to minimize student 'no-shows', thank you emails and booking confirmations.


**Workflows** can also be found under My Calendly.

Start with one of the common workflows below or create your own. [Create your own workflow](#)




**Email reminder to invitee**  
Reduce no-shows — send automated email reminders to invitees

[Use workflow](#)




**Email reminder to host**  
Never miss an event — get automated email reminders

[Use workflow](#)




**Send thank you email**  
Build relationships with a quick thanks

[Use workflow](#)




**Text reminder to host**  
Never miss an event — set automated text reminders

[Use workflow](#)



**Text booking confirmation to host**  
Keep hosts up-to-date with scheduled events

[Use workflow](#)



**Email your own feedback survey**  
Email a survey link from a third party like Typeform or Google Forms to get feedback from invitees after your event

[Use workflow](#)

[Show more](#)

## Optional: Invitee Questions

Your bookings page (the page that the student sees) will automatically ask for a student name and email. You can collect further information about the meeting request (i.e. what the student wishes to discuss with you) by adding additional invitee questions to the booking page.

Go to **My Calendly** and click on an event (i.e. One to One meeting). Under **Additional Options** you will see a box called **Invitee Questions**.

Click on the box entitled **Please share anything that will help prepare for our meeting**.



In the pop-up you can edit the question for students, you can make the answer requisite by selecting the **Required** box, and you can select the **Answer** type (for example, allow a one-line answer, check a box etc.).

Select **Apply**, then **Save & Close**.

The screenshot displays the 'Invitee Questions' interface. At the top, there is a title 'Invitee Questions' and a subtitle 'Name, Email + 1 question'. On the right side, there are 'Cancel' and 'Save & Close' buttons. The main area contains a form with 'Name \*' and 'Email \*' fields, an 'Add Guests' button, and a list of questions. One question is selected and highlighted with a blue border. The question text is 'Please share anything that will help prepare for our meeting.' Below the question text, there is a toggle switch for 'On' (which is currently turned on) and a checkbox for 'Required' (which is currently unchecked). Underneath, there is a dropdown menu for 'Answer Type' with 'Multiple Lines' selected. A red trash icon and the text 'Delete Question' are visible below the dropdown. At the bottom of the modal, there are 'Cancel' and 'Apply' buttons. The background form is dimmed, and the 'Save & Close' button at the bottom right of the main interface is also visible.

## Step 7: Share your availability with your students

1. Log in to Calendly. Go to **Home** and copy the link that appears beneath your name. You can also click on **Copy Link** in the meeting box below.

Filter

A Admin Calendly  
calendly.com/academiccalendly

+ New Event Type ▾ ⚙

⚙

**One to One**  
30 mins, One-on-One  
[View booking page](#)

A

[Copy link](#) [Share](#)

2. Share the copied link with your students by pasting it into a **Group Message** or creating a new thread on your **Class Forum** in the LMS.

To send your availability via email:

1. Go to **Home**, click on **Share** in the meeting box, then **Add times to email**.
2. From your calendar, select days and times to add to your email. Select **Continue** when finished. Select **Copy times** to clipboard.
3. Now you can paste these times into an email to send to a student.