

Introducing Aptem's Communications Connector with Microsoft Teams

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Today's presenters



Freya Ni Chleirigh
Product Owner

Freya is a Product Owner at Aptem and has worked within the apprenticeship sector for the last 4 years. She has experience with both HEIs and ITPs, developing compliance and quality assurance processes.



Hardeep Kondal
Marketing Executive

Hardeep is the Marketing Executive at Aptem and has worked within the apprenticeship sector for the last 3 years, completing his own apprenticeship during this period.

Agenda



- Introduction
- Setting up the Communications Connector
- Using the Communications Connector
 - Reviews and meetings
 - Placements/workshops
- Future enhancements

Please note, your organisation's chosen package and add-ons determines your access to functionality covered in this webinar. Please speak to your designated Aptem Champion/Super User or your CSM for further information.

Introduction



- The Communications Connector with Teams allows customers to bring their organisation's Teams license into Aptem.
- This feature allows administrators to manage online events in Teams directly via the Aptem platform.
- This integration will enable the following activities:
 - Reviews
 - Meetings
 - Placements/Workshops
- During the session we'll discuss the differences in how this integration will operate across these activities.

Setting up the Communications Connector with Teams

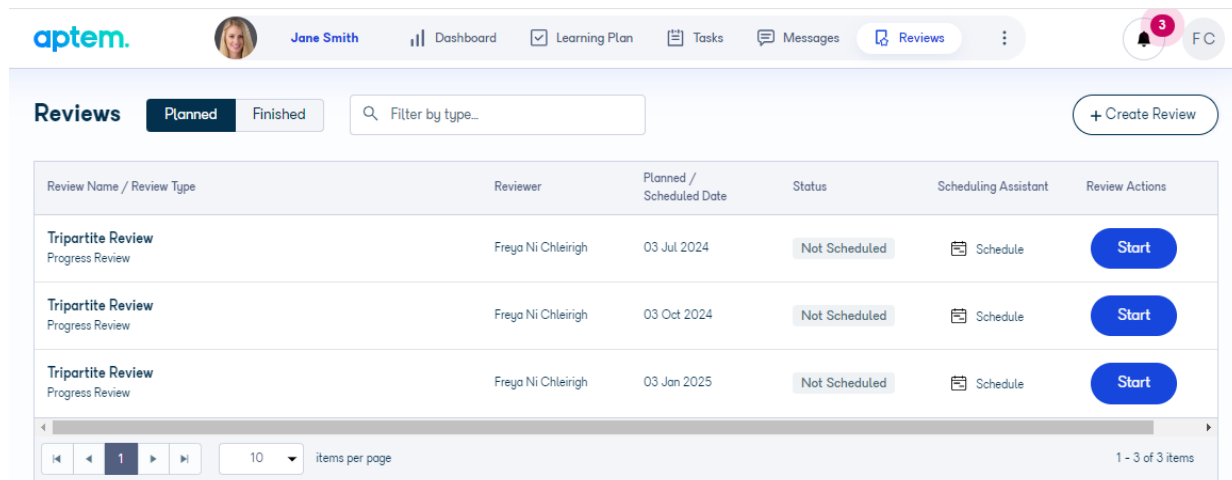
- Microsoft Teams requires your organisation to grant Aptem permission to access the integration.
- Your organisation must also set up an access policy within your Microsoft Teams admin account, and all tutors or administrators who need to schedule meetings in Teams should be added to the access policy.
- Finally, your organisation needs to specify a domain name to link to the integration (i.e. aptem.co.uk) and a scheduling timeframe between 1 and 60 days. The scheduling timeframe determines how far in advance Aptem schedules your meetings and reviews.
- Our Support team can then enable the integration for you.

Using the Communications Connector:

Reviews and meetings

- The Communications Connector with Teams uses reviews and meeting tasks to schedule these meetings within your Teams calendar.
- Aptem searches for new online events every 3 hours to schedule in Teams. This means that there could be a delay of up to 3 hours between scheduling a meeting in Aptem and it appearing in your Teams calendar.
- Reviews and meetings must be flagged as “Meet Online” to be scheduled in Teams.
- We schedule online events in Teams based on your organisation's specified scheduling timeframe. For example, if your scheduling timeframe is 30 days, Aptem will look for online events within the next 30 days to place in your Teams calendar and return a link to Aptem.
- Let's look at a working example.

Example: Scheduling a Review



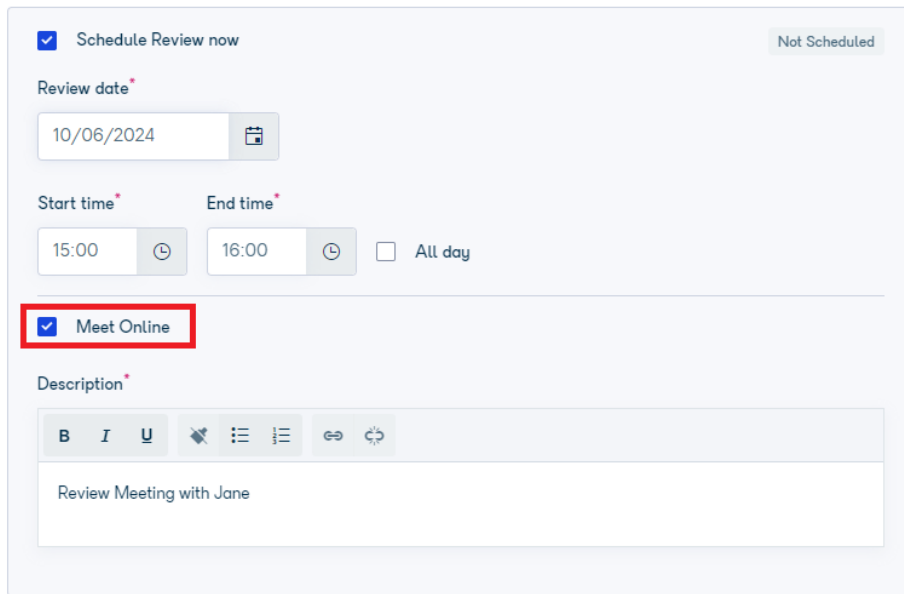
The screenshot shows the Aptem user interface for the 'Reviews' section. The user is Jane Smith. The 'Planned' tab is selected, showing a list of three reviews. All reviews are in a 'Not Scheduled' status. The interface includes a search bar, a '+ Create Review' button, and a pagination bar at the bottom.

Review Name / Review Type	Reviewer	Planned / Scheduled Date	Status	Scheduling Assistant	Review Actions
Tripartite Review Progress Review	Freya Ni Chleirigh	03 Jul 2024	Not Scheduled	Schedule	<button>Start</button>
Tripartite Review Progress Review	Freya Ni Chleirigh	03 Oct 2024	Not Scheduled	Schedule	<button>Start</button>
Tripartite Review Progress Review	Freya Ni Chleirigh	03 Jan 2025	Not Scheduled	Schedule	<button>Start</button>

10 items per page 1 - 3 of 3 items

- These reviews have not yet been scheduled in Aptem, therefore they will not be picked up by the 3-hour scheduling job.

Example: Scheduling a Review



☒ Schedule Review now Not Scheduled

Review date*






10/06/2024

Start time* End time*

15:00 16:00 ☐ All day

☒ Meet Online

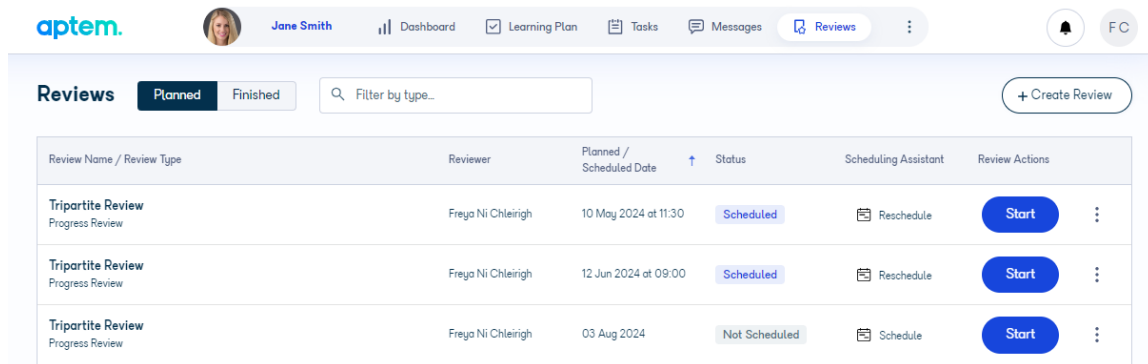
Description*

B *I* U     

Review Meeting with Jane

- Schedule the review either by using the Scheduling Assistant or the Create/Edit form. Be sure to check 'Meet Online' so that this review is flagged as an online event.
- *Note: the scheduling assistant does not offer 'Meet Online' within the interface, so you must ensure this review has been previously flagged as an Online Event, either within the component or the review Create/Edit form.*

Example: Scheduling a Review

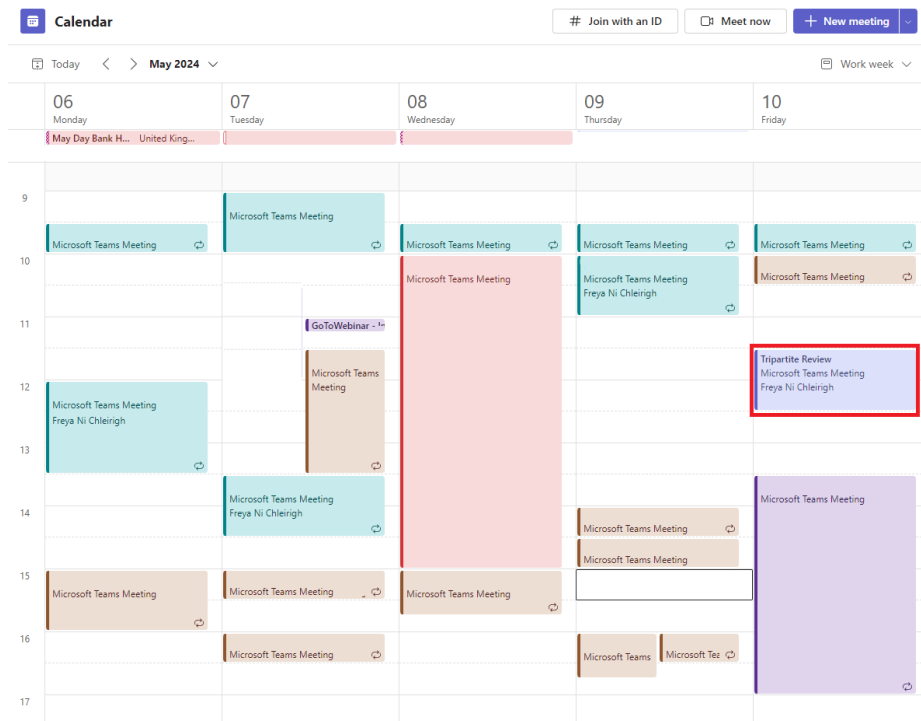


The screenshot shows the APTM user interface for managing reviews. At the top, the user is Jane Smith, with navigation links for Dashboard, Learning Plan, Tasks, Messages, and Reviews. The 'Reviews' section is active, showing a 'Planned' tab and a search filter. Below the header is a table of reviews.

Review Name / Review Type	Reviewer	Planned / Scheduled Date	Status	Scheduling Assistant	Review Actions
Tripartite Review Progress Review	Freyo Ni Chleirigh	10 May 2024 at 11:30	Scheduled	Reschedule	Start
Tripartite Review Progress Review	Freyo Ni Chleirigh	12 Jun 2024 at 09:00	Scheduled	Reschedule	Start
Tripartite Review Progress Review	Freyo Ni Chleirigh	03 Aug 2024	Not Scheduled	Schedule	Start

- The meeting will then be scheduled in Teams if its within the scheduling timeframe.
- Using a 30-day scheduling timeframe:
 - The review scheduled for 10 May 2024 will be scheduled in Teams during the next 3-hour job.
 - The review scheduled for 12 June 2024 will be scheduled on 12 May 2024.

Example: Scheduling a Review



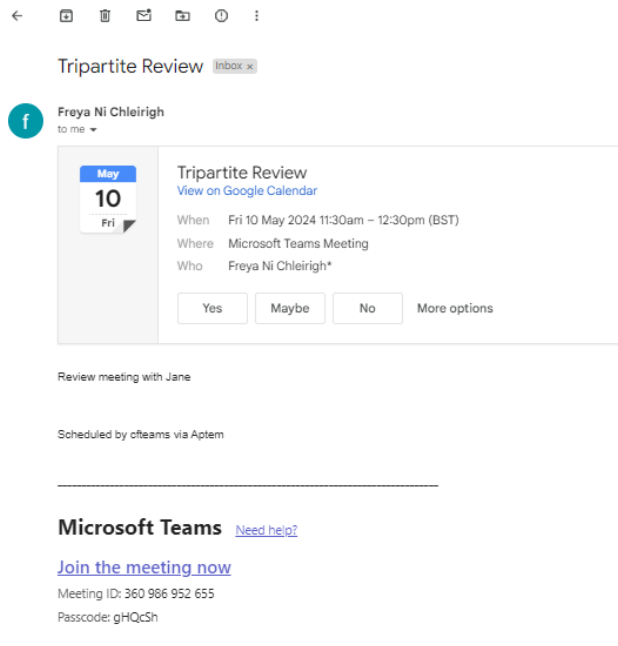
- The meeting appears in your Teams calendar alongside your other meetings.

Example: Scheduling a Review

The screenshot displays the Microsoft Teams interface for scheduling a meeting. The meeting title is 'Tripartite Review'. The date and time are set for 10/05/2024 from 10:30 to 11:30. The description field contains the text 'Review meeting with Jane' followed by 'Scheduled by cteams via Aptem', which is highlighted with a red box. The meeting is categorized as a 'Microsoft Teams Meeting' and is an 'Online meeting'. The right sidebar shows the 'Tracking' section with the organizer's name 'Freya Ni Chleirigh' and email 'm@gmail.com'.

- The meeting name follows the review name in Aptem, and the description copies from the task description in Aptem.
- Each description is followed by a note to advise the user that the meeting was scheduled by Aptem.
- The format is “Scheduled by [tenantname] via Aptem”
- *Note: you may edit the title and description, but this will not be reflected in Aptem. Similarly, once the meeting is scheduled in Teams, edits to the name or description in Aptem won't be reflected in Teams.*

Example: Scheduling a Review



- The learner is then invited by email.
- If the review is visible to the employer in the Reviews token, the employer manager **and** mentor (if applicable) will be invited by email.

Example: Scheduling a Review

REVIEW

Tripartite Review

COMPLETE WHEN: All evidence is accepted COMPLETE BY: 03 Jun 2024

REVIEW TYPE: Progress Review

10 MAY 11:30 - 12:30 Scheduled Reschedule

STATUS: Not Started

NUMBER OF EVIDENCE: 0/1

+ Upload File + Add Note

Evidence

Document and Notes	Status	Actions
No records available.		

Edit Task Start Review

Join Meeting →

Join Meeting button for tutor

REVIEW

Tripartite Review

COMPLETE WHEN: All evidence is accepted COMPLETE BY: 03 Jun 2024

REVIEW TYPE: Progress Review

10 MAY 11:30 - 12:30 Scheduled

STATUS: Not Started

NUMBER OF EVIDENCE: 0/1

+ Upload File + Add Note

Evidence

Document and Notes	Status	Edit
No records available.		

View Task Join Meeting →

Join Meeting button for learner

REVIEW MEETING

Freya Ni Chleirigh, Review meeting

Scheduled

Friday, May 10 11:30-12:30

Reminder: 2 days before

DESCRIPTION: Review meeting with Jane

CONTACT: Freya Ni Chleirigh
freyanichleirigh@aptem.co.uk

https://teams.microsoft.com/l/meetup-join/19%3ameeting_N2M3Y2l0MzMtNTdkMy00NGQxLTkyZcontext=%7b%22Tid%22%3a%22a3d78e44-50e8-4e59-83a2-5c47e9ce83d2%22%2c%22Oid%22%3a%22e0f8963c-6764-4e13-a268-b2599d895815%22%7d

Teams link in tutor and learner task

- The Teams link is also returned to Aptem, and the tutor can start the meeting from the Review or linked task.
- The learner can join the meeting from the learning plan component or linked task.

Example: Scheduling a Meeting

The screenshot displays the Aptem Learning Plan interface. The top navigation bar includes the Aptem logo, a user profile for Jane Smith, and links to Dashboard, Learning Plan, Tasks, Messages, and Reviews. The main section is titled 'Learning Plan' and shows a dropdown for 'Programme: Adult Care Worker'. Below this, there are filters for '3 Overdue', 'Quick Filters', and 'Filters', along with a 'Collapse all' button. A progress bar indicates 'Target progress: 0 of 3'. The main content area lists components by month, with May 2024 selected. Under May 2024, there is a 'Workshop - Module 1' (Scheduled online event, 3 Jun, In Progress) and a '121 Tutorial' (Meeting, 3 May, Not Started). The right sidebar shows details for the '121 Tutorial' meeting, including completion dates and evidence status.

Learning Plan Programme: Adult Care Worker + Add Component

3 Overdue Quick Filters Filters Collapse all Target progress: 0 of 3

APRIL 2024

MAY 2024

Workshop - Module 1 Scheduled online event 3 Jun In Progress

121 Tutorial Meeting 3 May Not Started

JUNE 2024

JULY 2024

AUGUST 2024

SEPTEMBER 2024

OCTOBER 2024

JANUARY 2025

MEETING 121 Tutorial

COMPLETE WHEN All evidence is accepted COMPLETE BY 03/05/2024

STATUS Not Started

NUMBER OF EVIDENCE 0/1

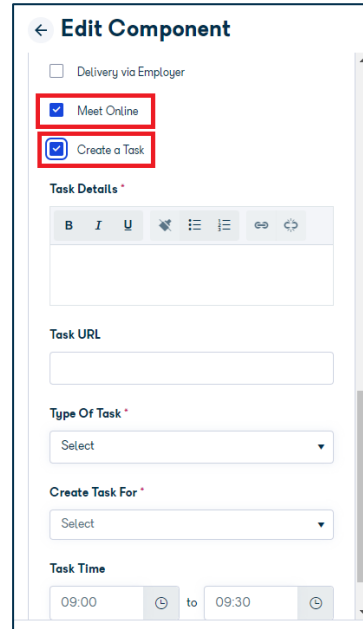
+ Upload File + Add Note

Evidence

Document and Notes	Status	Actions
No records available.		

- Similarly to Reviews, Meetings are scheduled via the task in Aptem. The above learning plan component does not have an associated task, therefore will not be scheduled in Teams.

Example: Scheduling a Meeting



Edit Component

☐ Delivery via Employer

☒ Meet Online

☒ Create a Task

Task Details *

B I U [Rich Text Editor Icons]

Task URL

Type Of Task *

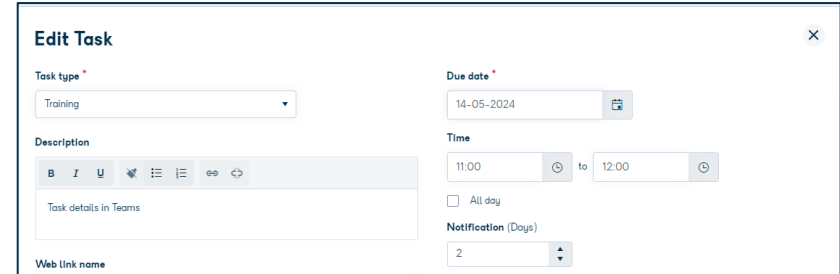
Select

Create Task For *

Select

Task Time

09:00 to 09:30



Edit Task

Task type *

Training

Due date *

14-05-2024

Description

B I U [Rich Text Editor Icons]

Task details in Teams

Time

11:00 to 12:00

☐ All day

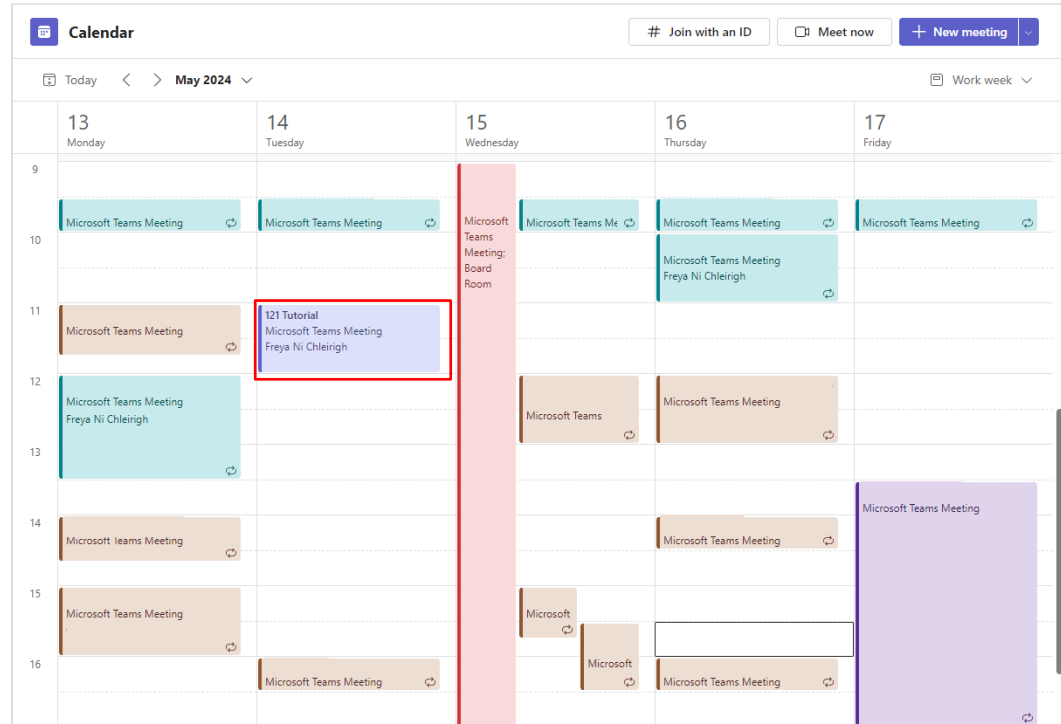
Notification (Days)

2

Web Link name

- To schedule a Meeting, tutors should create the task ensuring they select the 'Meet Online' checkbox.
- 'Task details' are used to populate the meeting description in Teams.
- The component name will be used for the meeting name in Teams.
- The scheduling timeframe will again be utilised – meeting tasks which fall within the scheduling timeframe (i.e. 30 days) will be searched for and scheduled every 3 hours.

Example: Scheduling a Meeting



- The meeting will be scheduled within the Teams calendar within 3 hours.
- The learner will be invited by email.

Example: Rescheduling a Meeting or Review

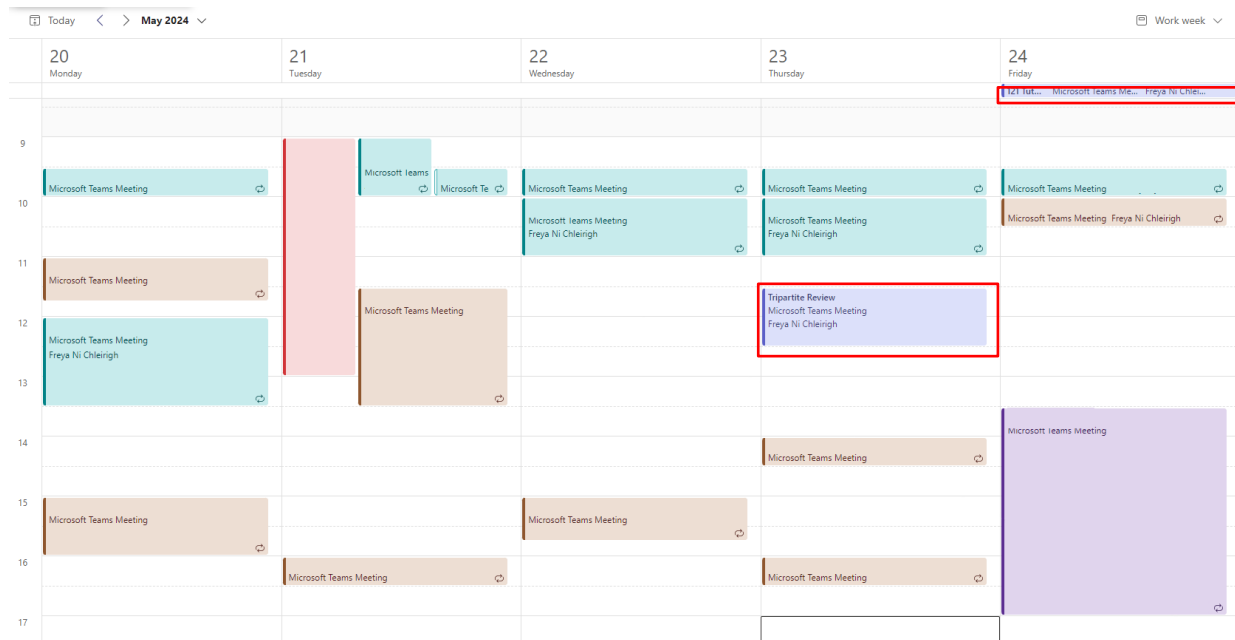
The screenshot shows the 'Scheduling Assistant' interface in Aptem. On the left, a calendar view for Thursday, 23 May 2024, shows a slot for Jane Smith from 09:00 to 10:00. Below the calendar, a table lists tutors and their availability. On the right, the 'Tripartite Review' details panel is shown, with a red box highlighting the 'Date' field (23/05/2024), 'Start time' (10:00), and 'End time' (10:30) fields.

Tutor	Active Caseload	Available Capacity
JANE SMITH	1	-
FREYA NI CHLEIRIGH	1	-

The screenshot shows the 'Edit Task' modal form. The 'Task type' is set to 'Training'. The 'Description' field contains 'Task details in Teams'. The 'Web link name' and 'Web link' fields both contain the URL: https://teams.microsoft.com/l/meetup-join/19%3ameeting_OTc3M2NmZDAtMl. The 'Due date' field is highlighted with a red box and shows '24-05-2024' with the 'All day' checkbox checked. The 'Notification (Days)' field is set to '2'. The 'Contact details' section shows the contact name 'Jane Smith' and email 'freyanaptem@gmail.com'.

- Reschedule review and meeting tasks in Aptem so that these can be rescheduled in Teams. You can use the scheduling assistant and the review 'Create/Edit' screen (for reviews) or the 'Edit Task' screen for either the meeting or review.

Example: Rescheduling a Meeting or Review



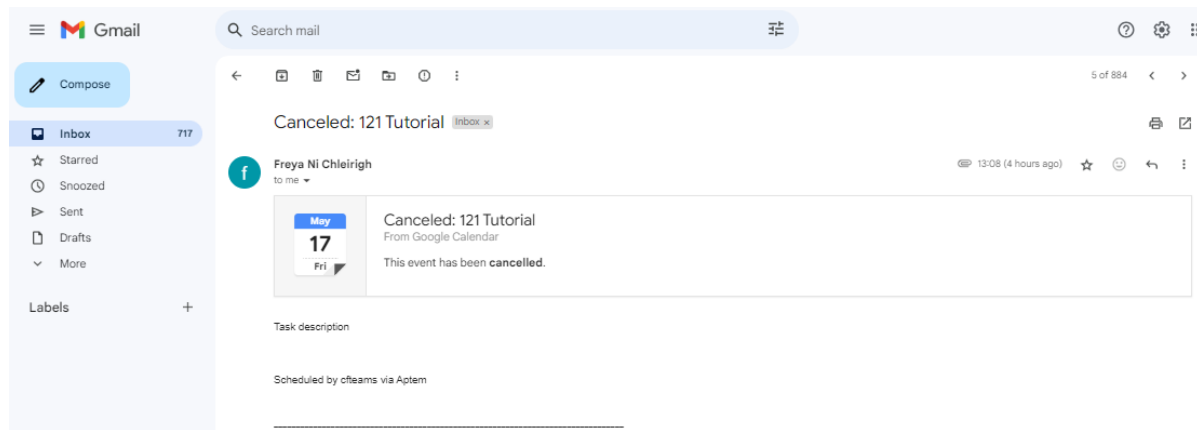
- These will reschedule in your Teams calendar within a few seconds. The learner and/or employer will receive an updated notification via email.

Future enhancements – May 2024



- We will be enhancing the Communications Connector with Teams in the May release
- We will add basic support for Placements/Workshops.
- Cancellations of Reviews and Meetings in Aptem will be reflected in Teams.

Example: Cancelling Reviews or Meetings



- Deleting a Review or Meeting learning plan component in Aptem results in a cancelled task. The task will disappear in the tutor's Teams calendar and the learner (and employer, where relevant) will receive a cancellation notification via email.

Example: Using Teams for Placements

Placement/Workshop profile Teams Workshop 2

▼ Placement/Workshop details

 Meet Online  Edit placement/workshop

Status	Confirmed
Owner	Freya Ni Chleirigh
Organisation	cfteams
Number of placements available	100
Maximum simultaneous placements	100
Available from	01/05/2024
Available to	31/05/2024
Location	Company Address
	London
	NW1 1FT
Categories	
Description	Please see Teams link in task

- Using your organisation's regular workflow for creating placements, these can then be flagged as 'Meet Online'.
- Selecting Meet Online triggers a Teams link to be created and returned to Aptem.
- *Note: this will not schedule the meeting in the tutor or learner's Teams calendar.*

Future enhancements



- We plan to expand the Communications Connector functionality with Teams in the next few releases. We are currently exploring features including:
 - Returning attendance for Placements/Workshops.
 - Meeting management in Teams reflected in Aptem.
 - Automatic return of transcripts for Reviews and Meetings.

Thank you

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