

Overview

This document provides information and guidance on the VERA platform's integration with Microsoft (MS) Teams to facilitate resource assignments and appointment scheduling.

Appointments are scheduled within VERA and are automatically reflected in MS Outlook via integration with MS Teams. Ensuring that time zones are accurately accounted for is crucial since VERA uses Coordinated Universal Time (UTC) to standardize times across different regions. Resources are similarly managed through VERA, with assignments synced to MS Teams. **Any adjustments to appointment times or resources should be made within VERA** to maintain consistency across platforms, ensuring that all changes are accurately reflected and managed centrally.

Procedures

1. Appointment is Created:

- Appointments are typically created by using the VERA Appointment Scheduler.
- Appointments are created in the time zone of the Service Territory.

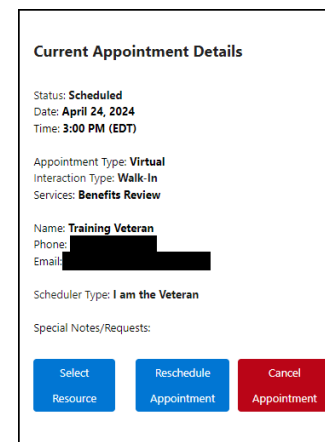


2. Resource Assignment:

- Assign resources to an appointment in VERA.
- This change will automatically update MS Teams, showing the appointment on the assigned resource's MS Office calendar.

3. Rescheduling and Reassignment:

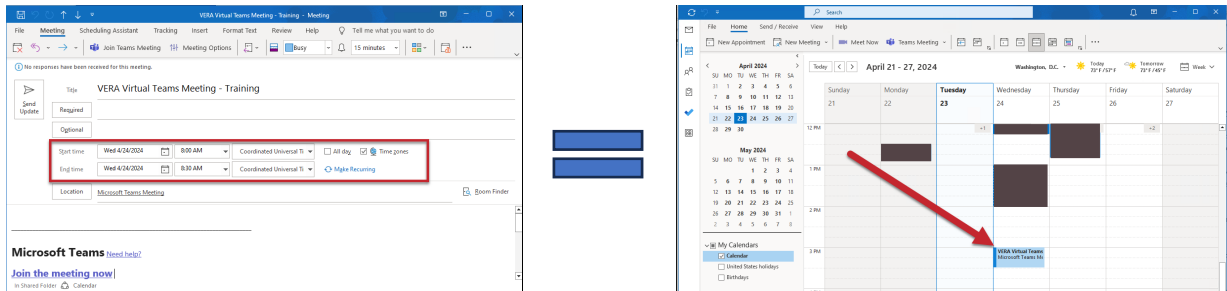
- If an appointment is rescheduled, update the appointment in VERA, which will automatically drop the previous resource and can be reassigned to a new one.



Potential Issues and Caveats

1. Perceived Time Zone Discrepancies:

- Users might see UTC in their MS Outlook appointment; there's no need to worry.
- The system automatically adjusts the time to match the Service Resource's local time zone, so the times seen are always correct for the applicable area.



In this example, the appointment is set to 8 am UTC – this correlates to 3 pm ET.

2. Appointment and Resource Changes in MS Outlook or MS Teams:

- Changes made to appointment times or resources directly in MS Outlook or Teams **do not** reflect in VERA, potentially leading to discrepancies.
- It is recommended that **all changes be made in VERA** to ensure data consistency.

3. Handling of Completed or Cancelled Appointments:

- Implement safeguards to prevent the reassignment of completed or canceled appointments to avoid data inaccuracies and operational confusion.

Best Practices

- **Avoid direct modifications in MS Teams:** Always make appointment or resource adjustments within VERA to ensure consistency.

Summary

This job aid outlines the procedures for effectively using the integration between VERA and MS Teams, highlighting the importance of managing appointments and resources through VERA to maintain data integrity across platforms. Users should remain vigilant about time zone differences and the specific functionalities of each platform to minimize issues and enhance operational efficiency.