SYNC OUTLOOK CALENDARS AND
SET APPOINTMENT AVAILABILITIES

Advisors and staff users can set up Navigate Staff to sync with employee Outlook calendars and set up Navigate so that students can schedule appointments with assigned advisors via Navigate Student. There are three steps to this process: Synchronize your Navigate with your employee Outlook calendar, Create your availability times, and View your upcoming appointments..

**Log in to Navigate Staff on the Web.** Use your employee login credentials to log in to Navigate Staff.

* From **go.niu.edu/navigate** click on the **Access Navigate Staff** button.
* If you have logged in to Navigate Staff before on that device, you should already be logged in. If not, log in using the same credentials you use to log in to your employee O365 account.
* After you log in, select your Staff view by clicking the triangle icon under the word
Home and select the **Staff Home** option.

**Step 1: Sync your Navigate Calendar with your Employee Outlook Calendar.**

* From your Staff Home screen, click the **Calendar** icon.
* When your calendar screen loads, click the **Settings and Sync button**.
* On the next screen, click the **blue Setup Sync** button.
* When the next screen appears, click the **Microsoft Office 365 (Latest Version)** button.

**Note**: The sync process will take approximately 10 minutes to complete. Wait for the sync finish before proceeding.

**Step 2: Create your Availability Times & Personal Availability Links (PAL).**

Availability times display dates and times you are available for appointments. After synchronizing Navigate to your Outlook calendar, appointments created in Navigate will appear on your Outlook calendar.  **Note**: Calendar items created in Outlook will appear in your Navigate calendar as **Busy** – you are unavailable for advising appointments.

Availability times also can be included in your **Personal Availability Link (PAL)**. Students can click a PAL link that youcopy and paste into email signatures, Web sites, or e-flyers. The PAL link takes students directly to the Navigate Scheduler, in **Navigate Student** app or Web portal, and shows availabilities based on the configurations you selected.

**Strategy Tips**:

* You could set the days and times of your Availability to match your daily office hours. Your **Personal Availability** settings are used as the configurations for your PAL link. which can be found at the bottom of the availabilities screen.
* You can also use the availability times to offer specific dates and times for appointment campaigns or drop-in windows of time. **Example**: You could offer priority appointments to students on academic probation — allowing only students in the group you specify to schedule those appointments.

– Instructions continue on next page. –

**Step 2: Create your Availability Times & Personal Availability Links (PAL) – Continued**

* From your Staff Home screen, click the **Availability** tab located beneath the word Staff Home.
* Click the **Actions** link and select **Add Time**.
* Select the options that you will be available for a block of time.
* You can create as many times associated with your availability as you need.
* Click on the days to include as available for the availability time block. Shaded days will be active for students to schedule with you for the times and services you select.
* Type the start (From) and end (To) times that students can schedule with you.

**Note**: You can set one availability that allows for students to schedule appointments on Monday and Wednesdays from 9 a.m. to Noon, and a second availability for either the same days or different days from 1 p.m. to 4 p.m.

* Set the duration that this availability will be active (e.g., A range of dates or the current term).
* Select the box for **Add this availability to your personal availability link**.
* Set the availability to work with **Appointments** that students pre-schedule, **Drop-ins** if you permit students to come during open office hours, or to use with **Appointment Campaigns**. (Shaded options are active; click to activate or deactivate.)
* Identify the modality in the Meeting Type field.
* In the Care Unit field, select **Advising** for services related to academic advising.
* The **Location** field identifies colleges, departments or units; they are not necessarily physical locations. Location is a Navigate term, but is used to identify the area in which you are working.

**Step 3: View your Upcoming Appointments on your Navigate Staff Appointments Tab**

These instructions will guide you through the steps to view appointments students have scheduled with you.

* Click the grey **Appointments** tab located on your **Staff Home** screen.

The Appointments screen has two sections:

* **Upcoming Appointments:** Displays the list of students who have appointments with you that have not occurred yet.
* **Reporting/Recent Appointments:** Displays student appointments within a certain period after the appointment.

Instructions for reporting on appointments are included in a separate Navigate Guide.

– See next page for how to view upcoming appointments in Navigate Appointments Center. –

**Step 4: View your Upcoming Appointments in Navigate Appointments Center**

Navigate provides a view of appointments for the location associated with your availabilities. You can view an appointments calendar that shows appointments with an advisor by date and time.

* From the bottom right-hand corner of your Staff Home screen, click on the **Additional Modes** link.
* Select **Appointment Center** from the pop-up box.

**Important: Do not** select **Kiosk** if you see that option.

r On the next screen, a list of locations will appear. Select the Navigate location associated with your availability.
**Note:** There is a field to search for locations by name.

The location screen will then display the following views and filters to help you identify student appointments scheduled with staff members associated with the Navigate location connected with their availabilities:

* A calendar view (located at the bottom of the screen) showing times of appointments by staff member for a specific day.
* Search filed to find student appointments by typing their names.
* Date and time filters to identify appointments in a specific range.
* Service, staff and meeting type (modality) filters to locate appointments.

For assistance with Navigate Staff or Navigate Student, please visit **go.niu.edu/navigate** to select the help link.