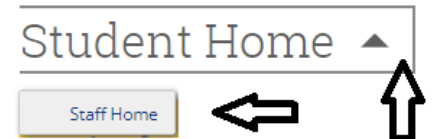


Advisors and staff users can set up Navigate Staff to sync with employee Outlook calendars and set up Navigate so that students can schedule appointments with assigned advisors via Navigate Student. There are three steps to this process: Synchronize your Navigate with your employee Outlook calendar,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

## Log in to Navigate Staff on the Web

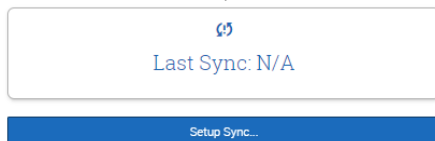
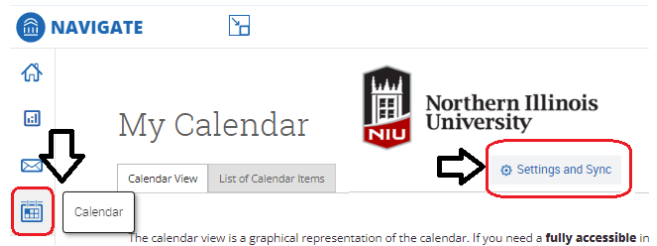
Use your employee login credentials to log in to Navigate Staff.

- 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.



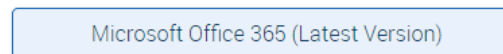
## Step 1: Sync your Navigate Calendar with your Employee Outlook Calendar

- 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.

Please Choose Your Calendar Application:



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

– See next page for Step 2. –



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

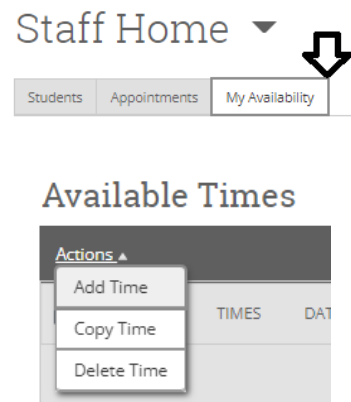
Availability times display dates and times you are available for appointments. After synchronizing Navigate to your Outlook calendar, appointments created in Navigate will appear on your Outlook calendar. **Note:** Calendar items created in Outlook will appear in your Navigate calendar as **Busy** –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

- 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.



– Instructions continue on next page. –



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

- 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.

### MODIFY AVAILABILITY

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From 9:00am To 4:00pm

All times listed are in Central Time (US & Canada).

How long is this availability active?

Forever

A Range of Dates

Terms

Spring 2023 (Default Term)

Add to your personal availability link?

Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Meeting Type

In-Person (Appointment)  Virtual

Care Unit

Advising

CLAS Advising

COB LRS Undergraduate Student Success Center

College of Education Office for Student Success

College of Health & Human Sciences Advising

College of Health and Human Sciences Graduate Programs

College of Visual & Performing Arts

Communication

Select Location

– Instructions continue on next page. –



- ❑ Select the **Services** you wish to include in this availability for students to schedule on these days and times. **Note:** You can create multiple availabilities with different combinations of days, times, available services, and modalities.
- ❑ You can include a phone number for students to call for phone appointments, or a web address (URL) for students to use for virtual meetings.
- ❑ In **Special Instructions for Students**, type the message students will receive via email automatically when this appointment is confirmed.
- ❑ You can set the maximum number of students who can schedule meetings with you for the days, times and services identified.
- ❑ When you have configured your settings for the availability time, click the blue **Save** button.
- ❑ Repeat for other availability times you need to create to reflect the times accurately when you can take appointments.

Services

Please select services

URL / Phone Number

8157533164

Special Instructions for Student

**B** *I*

Thank you for scheduling an appointment with me. The appointment details are included in this message.

For in-person appointments, please come to [Building], room #.

For virtual appointments, please use the link below to access a shared MS Teams chat, Teams URL:

\_\_\_\_\_

Please note: If you need to reschedule or cancel your

Will you be meeting with multiple students?

*These settings will not be used for kiosk and campaign purposes.*

Max Number of Students per Appointment

Cancel **Save**

### 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 is included in a separate Navigate Guide.

## Staff Home ▾

Students Appointments My Availability

### Upcoming Appointments

Care Unit: All Care Units ▾

Actions ▾

All Care Units

Advising

Athletics

### Reporting

Recent Appointments Recent Reports You Created

#### Recent Appointments

Care Unit: All Care Units ▾

Actions ▾							Show Cancelled
	DATE	SERVICE	ATTENDEE	TIME	REPORT FILED?	DETAILS	
<input type="checkbox"/>	1/1 03/03/2023 1:30pm - 2:30pm CT	Course Assignment - Undergraduate - 60 mins	<a href="#">Student Name</a>	60 min	<a href="#">Report Details</a>	<a href="#">Details</a>	

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

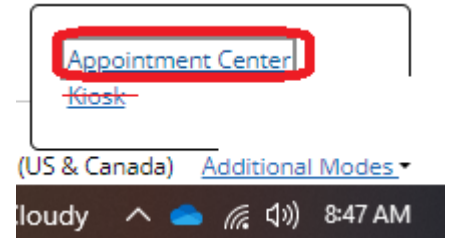
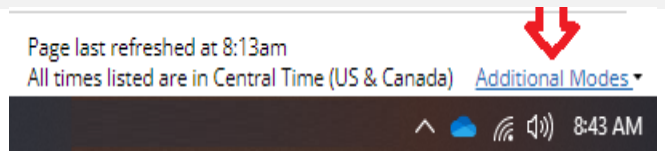


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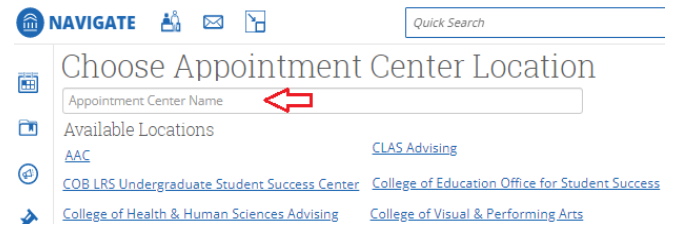
## View your Upcoming Appointments in Navigate Appointments Center

Navigate provides an appointments view 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.**

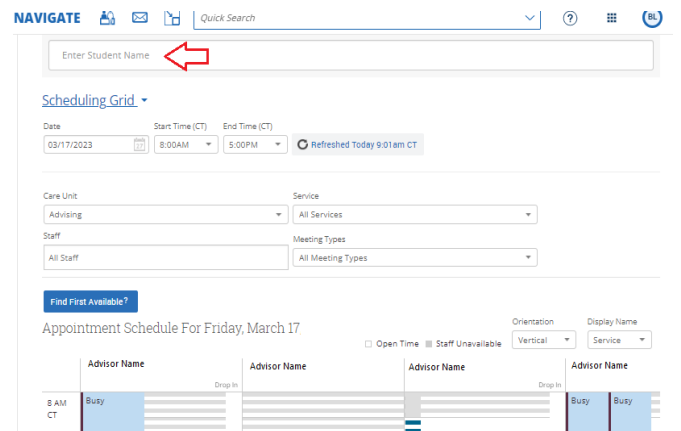


- ❑ On the next screen, a list of locations will appear. Select the Navigate location associated with your availability. **Note:** There is a field to search for locations by name.



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 field 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 additional assistance with these instructions, you are welcome to submit a [help request](#) or attend one of the Navigate Learning Sessions on this topic.

[go.niu.edu/navigate](https://go.niu.edu/navigate)



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