



Calendar Sync

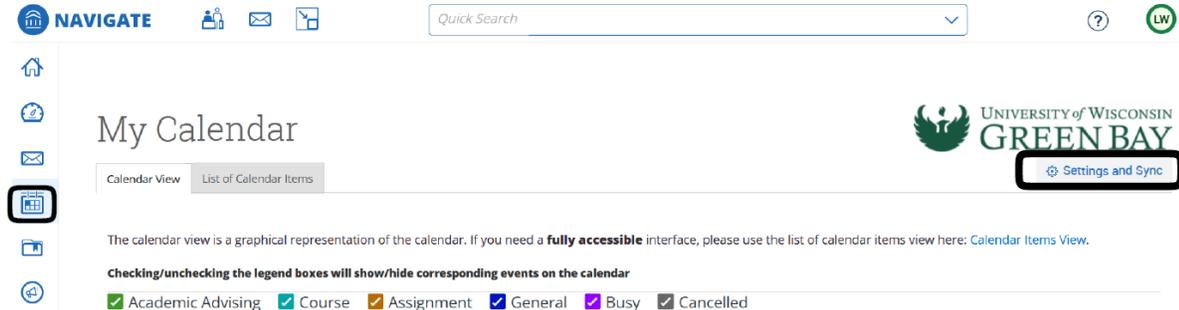
Where: Calendar sync configurations are in the **Calendar tab**, which is accessible by clicking the calendar icon in the left-hand navigation bar, and then clicking **Settings and Sync**.

Who: Calendar syncing provides **staff** and **faculty** with the ability to sync their professional calendars with the Navigate calendar.

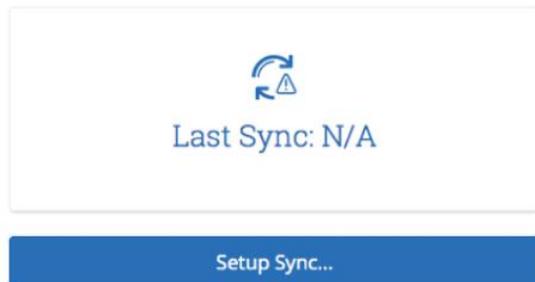
Feature Overview

We strongly recommend syncing your calendar to the Navigate platform so that appointments can flow between your Navigate calendar and professional calendar, blocking off that time and preventing double booking. Remember: only sync your calendar in your live platform, not your training platform, to avoid issues and confusion. And only sync one professional calendar to Navigate.

To set up your calendar syncing, click the calendar icon in the left-hand navigation bar. Then click the **Settings and Sync** button.



The Calendar Settings page will open. If you have not yet set up a sync, you will see the image below.



Click **Setup Sync**. The Calendar Settings: Setup page opens. This page may look different if your institution has disabled Service Accounts.

You have 4 ways of syncing your calendar. Most institutions will use Office365/OAuth by the end of summer 2019. If a user clicks on Microsoft Outlook for their sync, they will be shown both Office365 and Outlook Service Account options as well as a banner telling them your school prefers Office365. Outlook Service Accounts will not show once your school turns them off.

Syncing with Microsoft Outlook

Choose Sync For Microsoft Outlook:



1 Your school prefers to use Office 365 sync. Use Office 365... ×

Microsoft Office 365
Recommended option.

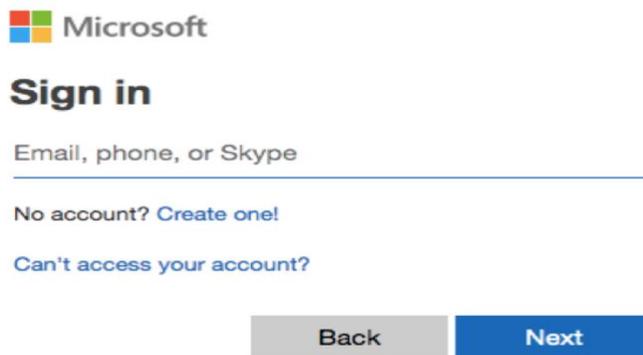
Outlook Service Accounts
Will be deprecated in 2020.

Go back...

Syncing with Office 365

If a user clicks Office365, they will be taken to a Microsoft sign in page, as shown below. They will need to know their email and institution password to complete the sync setup.

Once the sync is completed, your user will be taken back to the main Calendar Settings page with information about their sync on display.



Microsoft

Sign in

Email, phone, or Skype

No account? [Create one!](#)

[Can't access your account?](#)

Back Next

You will then be redirected back to the Navigate Calendar page, and prompted to finish setting up your calendar. Choose one of the following options:

- **Select Calendar for Two-Way Sync (Recommended Option):** All calendar items will sync back and forth between your Navigate calendar and your professional calendar (i.e., Navigate calendar ↔ professional calendar). Events from your professional

calendar will display as "Busy" in your Navigate calendar. Limited details from Navigate will display in your professional calendar.

- **Select Calendar for Free/Busy Sync:** Choose this option if you only want events from your professional calendar to display as "Busy" on your Navigate calendar (i.e., professional calendar ↔ Navigate calendar).

Once you have selected the appropriate calendar, hit **Save and your sync** is complete, with information about their sync on display.

Sync Options

After you have set up your Calendar Sync, you will see this when you open your Settings and Sync page in Navigate.

You have two options listed under the sync to help you troubleshoot when your calendars are not syncing, if your email address has changed, etc.

Retry Sync lets users reconnect to the Navigate servers if calendars are not syncing.

Disconnect Sync lets a user disconnect their personal calendar from Navigate. Users might do this if they leave the institution or have changed their email address. Disconnecting your calendar takes about 30 minutes to finish so your user may still see Navigate items on their calendar for a short time.

Note: Events synced are limited to 3 months in the past and 12 months in the future.

Frequently Asked Questions

When should I sync my calendar?

We recommend only syncing the calendar once. We strongly recommend not syncing your calendar on your training site, but only on your production site so that no sample appointments appear on your personal calendar.

What is Free/Busy?

These are events that have synced from your professional calendar into the Navigate platform. They will display in your Navigate calendar as either free or busy times.

What are Blocked times on my calendar?

Blocked times may appear on your calendar if you have an appointment made from a Care Unit for which you do not have the permissions to view appointments.

How many calendars can I sync with Navigate?

You can only choose one calendar to sync with Navigate. If you are trying to sync multiple calendars with Navigate, there will be errors, and it will not be successful.

Why won't certain events sync on my calendar?

There are several reasons why events do not sync on your Navigate calendar. First, a recurring event with no end-date will not sync in Navigate. Recurring events with more than 750 instances also will not sync; however, that is a "rolling" 750 (e.g. it is synced as 750 from today, then 750 from tomorrow)

What do 'Tentative' appointments on my calendar sync as on Navigate?

Tentative, busy, and away appointments all sync as 'Busy' on your Navigate calendar.

How long does it take to sync my calendar with Navigate the first time I do so?

The first time you sync your calendar with Navigate, it may take up to 10 minutes to complete the sync.

How frequently is my calendar synced with Navigate?

Appointments should be synced to and from the Navigate calendar within seconds. If you are noticing a lag in appointment syncing, contact your Application Administrator to help you troubleshoot. If you do not adjust anything yourself in your calendar or Navigate, the Exchange calendar sync will refresh on its own every 30-35 minutes. Google calendar sync will refresh only when changes are detected.

Why can't I cancel my appointment in Navigate?

The appointment was probably created in your professional calendar. You need to edit your appointment in your professional calendar application, not in Navigate.

Why can't I cancel my appointment in my professional calendar?

The appointment was probably created in Navigate. If an appointment is created in Navigate, you must cancel it in Navigate.

Every time I create a Summary Report for a student, it automatically creates an appointment on my professional calendar. Is there a way to turn that off?

No, there is no way to change this behavior. When you create an ad-hoc summary report, the Navigate platform is automatically creating an appointment in the past based on the information you include in that summary report. The past appointment will then sync to your professional calendar. This process ensures the appointment data is accurate, even if you did not use the scheduling workflows to create that appointment.

What happens if I change my name or my email at my institution?

You will need to have your account reset. The information will need to be put into user settings before syncing the updated calendar. Talk to your institution's Application Administrator if this is your situation.

Does the Navigate calendar read or display details of my personal or professional appointments?

No. The Navigate calendar does not see details of your personal or professional appointments. It only pulls in your appointments to list time as Free/Busy to prevent scheduling appointments conflicts.

What information can be synced to my professional calendar from Navigate?

Navigate appointments synced to your professional calendar should display the type of appointment, time, and location by default. Your institution may decide to sync additional information, including student ID (in both the body and title), student name (in both the body and title), and student phone number.

Is it possible to include student email address in the synced appointment within my professional calendar?

No, it is not possible to include student emails. The only information that can sync to your professional calendar are those listed in the answer to the question above – type of appointment, time, location, student ID, student name, and student phone number.

Why is my all-day event in my professional calendar not blocking off time on my Navigate calendar?

Most all-day events default to "free" in calendars. You will need to mark those busy to avoid having those days appear available to appointments in Navigate. In the opposite case, all-day free appointments with no end day might sync as busy – should that occur, include an end date in your appointments for them to sync as free time in your Navigate platform.

What should I do if there are errors with my calendar sync integration?

If your calendar sync is experiencing issues, first try Retry Sync. Then, please contact your Application Administrator, who can troubleshoot with you and then work with our Member Support team for further help.

Do student courses or professor courses sync through Navigate?

Yes, courses do sync through Navigate.