

UO Navigate Scheduling Updates: Summer 2021

Student Scheduling Updates! Scheduled release: July 30, 2021

Please read below for important updates to Navigate. Because each advising unit has unique workflows, it is recommended that the unit's Navigate lead schedule a time with Erin McKercher, Advising Technology Manager, to explore the best combination of features and settings to best meet the unit's needs.

The Navigate scheduling interface will be updated to provide students with a more streamlined scheduling workflow - **students will be able to schedule appointments easier than ever!** The new format has been modeled after Google Flights, with fewer screens and drop-down options for students to have to navigate.

Students will be able to select their preferred meeting type for the appointment: **In-Person, Zoom/Teams (Virtual), Phone**. Appointment meeting type will depend on the individual advisor's Navigate availability and meeting types available.

Departments will be able to have **descriptive text** (such as office hours, advising info, etc.) that displays to students if they click on the department name when scheduling.

Advisors will be able to share a **scheduling link** (Personal Availability Link) with students so they are taken directly to the scheduling page that shows the staff member's appointment availability, with the department info already filled in.

Departments will have the option to enable **virtual check-in**, where a student virtually checks in using Navigate for their appointment or drop-in.

Contents:

[Student Scheduling Interface Updates](#)

[Advisor Scheduling Links](#)

[Meeting Type Now Required when Scheduling Appointment](#)

[Students can View Department Info when Scheduling](#)

[Virtual Check-in](#)

[Navigate Support](#)

UO Navigate Scheduling Updates: Summer 2021

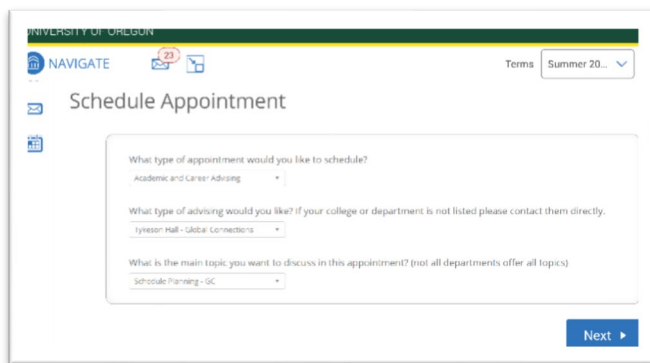
Student Scheduling Interface Updates

The Navigate scheduling interface will be updated on July 30 to provide students with a more streamlined scheduling workflow - students will be able to schedule appointments easier than ever! The new format has been modeled after Google Flights, with fewer screens and drop-down options for students to have to navigate. The format is being updated in both the Navigate app and website.

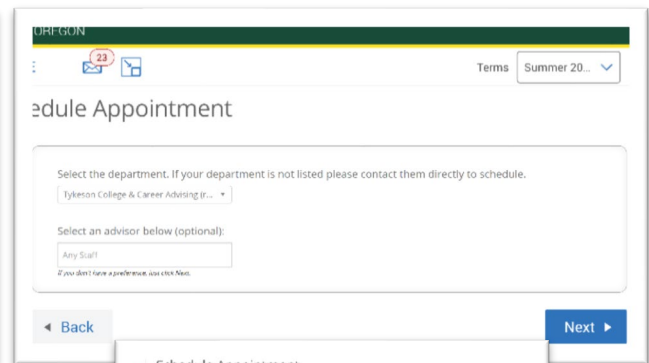
The new scheduler view will be enabled in the UO Navigate site on Friday morning, July 30.

Currently, students walk through several drop-down options and multiple pages/screens before they get to the appointment confirmation page:

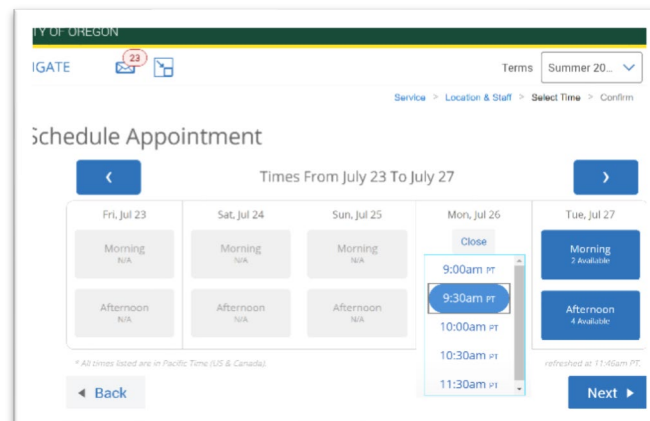
First page:



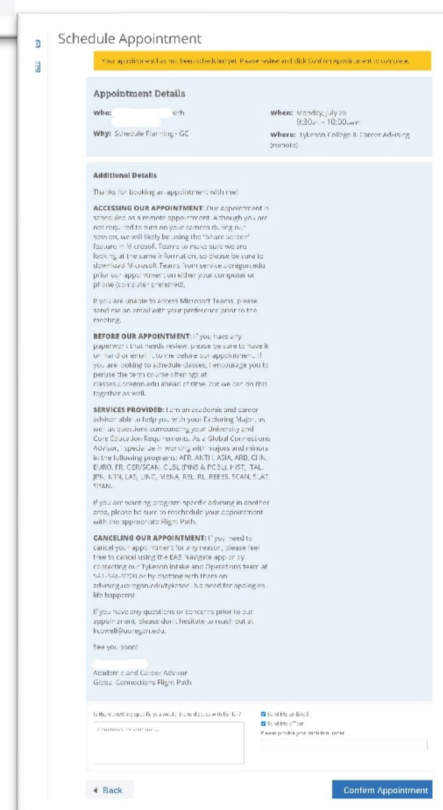
Second page:



Third page:



Confirmation page:



In the **new student scheduler view**, the department and service have been combined into one drop-down menu called “Service” so students get through scheduling more efficiently:

Same page,
Service
drop-down:

NEW! APPOINTMENT SCHEDULE

NAVIGATE

New Appointment

Tykeson Hall - Global Connections

- ☒ upcoming Mags/Art / non-Careers - K12
- ☐ CPA/Guid. Co-course - CC
- ☐ Circular School - CC
- ☐ eng. Sem. to schedule Planning - K12
- ☐ Personal/Other - Occasional - CC
- ☐ Broadside Planning - CC

Pick a Date

Friday, July 29th 2021

Terms: Summer 2018

All Filters

Start Over

Academic and Career Advising

Schedule Planning: GO

What type of appointment would you like to schedule?

☒ Academic and Career Advising

☐ Schedule Planning: REC

Kenlei Cowl
 Tykesson College & Career Advising
 Academic and Career advising for engineering and College of Arts & Sciences students and is located on the first & second floor of Tykesson Hall.

Service

☒ Schedule Planning: REC

Pick a Date

<
 July 2021
>

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Mon, Jul 26th

11:00 - 10:59 AM	11:00 - 11:59 AM	11:00 - 11:59 AM	11:30 - 12:02 PM	12:00 - 12:59 PM	12:58 - 1:00 PM
1:00 - 1:59 PM	2:00 - 2:59 PM	3:00 - 3:59 PM	4:00 - 4:59 PM	5:00 - 5:59 PM	

Tues, Jul 27th

11:00 - 10:59 AM	11:00 - 11:59 AM	11:00 - 11:59 AM	11:30 - 12:02 PM	12:00 - 12:59 PM	12:58 - 1:00 PM
1:00 - 1:59 PM	2:00 - 2:59 PM	3:00 - 3:59 PM	4:00 - 4:59 PM	5:00 - 5:59 PM	

Wed, Jul 28th

11:00 - 10:59 AM	11:00 - 11:59 AM	11:00 - 11:59 AM	11:30 - 12:02 PM	12:00 - 12:59 PM	12:58 - 1:00 PM
1:00 - 1:59 PM	2:00 - 2:59 PM	3:00 - 3:59 PM	4:00 - 4:59 PM	5:00 - 5:59 PM	

Thurs, Jul 29th

11:00 - 10:59 AM	11:00 - 11:59 AM	11:00 - 11:59 AM	11:30 - 12:02 PM	12:00 - 12:59 PM	12:58 - 1:00 PM
1:00 - 1:59 PM	2:00 - 2:59 PM	3:00 - 3:59 PM	4:00 - 4:59 PM	5:00 - 5:59 PM	

Mon, Aug 2nd

11:00 - 10:59 AM	11:00 - 11:59 AM	11:00 - 11:59 AM	11:30 - 12:02 PM	12:00 - 12:59 PM	12:58 - 1:00 PM
1:00 - 1:59 PM	2:00 - 2:59 PM	3:00 - 3:59 PM	4:00 - 4:59 PM	5:00 - 5:59 PM	

All times listed are in local America/Denver.

[illegible]

Confirmation page:

UO Navigate Scheduling Updates: Summer 2021

Advisor Scheduling Links – NEW! (optional)

For advisors and other staff who offer appointments through Navigate, a very exciting update with this release is the addition of the Personal Availability Link (PAL). You can also think of this as your **Personal Appointment Link**. Upon clicking the link, students are taken to a scheduling workflow that has your chosen availabilities pre-filled in the Navigate scheduling page.

In each of your availability records (**My Availability** tab) in Navigate, you will see a checkbox to add that availability to your personal availability link.

This link can be located at the bottom of your availability page in Navigate. You can copy and paste in your email signature, an email to a student, on a website, etc. Students can click on the link to be brought directly to your appointment availability. Each advisor's link is unique.

NOTE: Personal Availability Links do NOT include drop-in or campaign availability, even if you check the box. This means when students click on your PAL they will only see your appointment availability.

If you're new to Navigate, remember to [sync your Outlook calendar in Navigate](#) before setting up your appointment availability.

ADD AVAILABILITY

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From 10:00am To 3:00pm
All times listed are in Pacific Time (US & Canada)

How long is this availability active?
Forever

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 ☒ Zoom/Teams (Virtual) ☒ Phone

Care Unit
Please select a care unit

Location
Please select a location

Cancel Save

For: Appointments

Days	Time	Duration	Location	Description
Mon, Tue, Wed, Thu, Fri	10:00am - 4:00pm	Forever	UESS Academic Advising	General Advising - OAA, Major Exploration - OAA, OAA Availability, Other Questions - OAA, Planning my schedule - OAA For: Appointments

* All times listed are in Pacific Time (US & Canada)

Personal Availability Link

Link: <https://uo.campus-training.eab.com/pal/jA2Q9Z6taz> Copy

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Meeting Type Included in Appointment Scheduling

Meeting Types previously existed as an optional field that staff can complete in the appointment summary window. This allowed staff to indicate how they met with students after the appointment (for example, Phone/Teams/Zoom, In-Person).

In the upcoming release, Meeting Types will be updated to allow staff to indicate their availability for various meeting types and the student scheduling workflow will be updated to require students to select their preferred meeting type for that appointment.

The scheduling meeting types will be:

- In-Person
- Zoom/Teams (Virtual)
- Phone

The screenshot displays the 'New Appointment' page in the UO Navigate system. On the left, there is a sidebar with navigation icons and a calendar for June 2021. The main area shows a list of available appointment slots for various dates (Wed, Jun 9th, Mon, Jun 14th, Wed, Jun 15th, Mon, Jun 21st). Each date has a grid of time slots (e.g., 8:00 - 9:30 AM, 9:30 - 10:30 AM, etc.). A dashed orange line highlights a specific time slot on the calendar, which is then magnified in a larger inset window on the right. This inset window shows the 'Staff' selection dropdown and the 'How would you like to meet?' filter. The filter is currently set to 'By Phone' and has a search bar labeled 'Search by name'. Below the main interface, a caption reads: 'Added an appointment filter within student scheduler that allows students to choose Meeting Types on the Available Times page'.

Added an appointment filter within student scheduler that allows students to choose Meeting Types on the Available Times page

For appointment summaries, the existing meeting types will remain (Email Advising, Workshop, etc.), except that Phone/Teams/Zoom will now be two separate meeting types: Phone and Zoom/Teams (Virtual).

UO Navigate Scheduling Updates: Summer 2021

What do I need to do for the new Meeting Types?

On or after July 30, 2021:

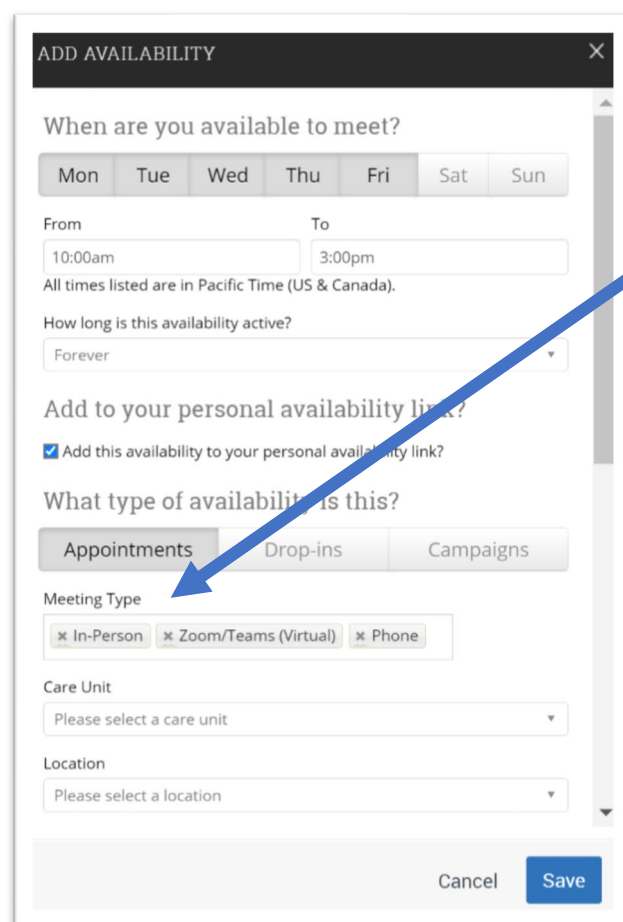
If you offer appointments in Navigate, you need to edit each of your availability records to add the appropriate meeting types. Students will NOT see any availability that does not have at least one meeting type.

By default, on July 30, your current availability records will be edited to include **Phone** and **Zoom/Teams (Virtual)** meeting types.

You may wish to add **In-Person**, or create new records with separate Special Instructions for in-person appointments. Some advisors are not yet offering in-person appointments, but plan to at a later date. If this is your situation, just be sure to set up availability records with date ranges, and make sure the In-Person meeting type is set up for future dates.

Steps to add Meeting Types to your Availability:

1. [Navigate home](#) > My Availability > Edit (for your first availability record)
 2. In Meeting Type, add In-Person to the same availability records, and put all of the instructions in one Special Instructions box. Or, you can add separate availability for In-Person that has separate instructions.
- You can have multiple meeting types in one availability record. Be sure to include the appropriate instructions for students who choose each meeting type. If you prefer, you can have separate availability records for In-Person versus Phone + Virtual (Teams/Zoom).
3. Remember, check the box to “Add this availability to your personal availability link” if you want this availability included in the scheduling link.



The screenshot shows the 'ADD AVAILABILITY' form. At the top, it asks 'When are you available to meet?' with a day-of-the-week selector (Mon-Sun), a 'From' time (10:00am) and 'To' time (3:00pm) selector, and a note that 'All times listed are in Pacific Time (US & Canada)'. Below this is a 'How long is this availability active?' dropdown set to 'Forever'. The next section is 'Add to your personal availability link?' with a checked checkbox. The 'What type of availability is this?' section has three tabs: 'Appointments', 'Drop-ins', and 'Campaigns'. Under 'Appointments', there is a 'Meeting Type' section with three checkboxes: 'In-Person', 'Zoom/Teams (Virtual)', and 'Phone'. A blue arrow points to the 'In-Person' checkbox. Below this are 'Care Unit' and 'Location' dropdown menus, both with 'Please select a care unit' and 'Please select a location' respectively. At the bottom right are 'Cancel' and 'Save' buttons.

UO Navigate Scheduling Updates: Summer 2021

Students can View Department Info when Scheduling (optional)

Students can now view text that a department would like to display when the student is scheduling an appointment or viewing drop-in times in Navigate.

Please email navigate@uoregon.edu if you have text that you would like added for your department.

NOTE – Links (URLs) are not clickable in this text section. For example, if you want your website in the text, you can include the link (for example, <http://advising.uoregon.edu>) but the student would need to copy and paste the link in a web browser.

UNIVERSITY OF OREGON TEST

NAVIGATE

Terms Summer 20... ME

< Go Back | Dashboard

New Appointment

All Filters Start Over Academic and Career Advising Follow-up Appointment

What type of appointment would you like to schedule?

Academic and Career Advising

Service

Follow-up Appointment

Pick a Date

July 2021

23

UESS Academic Advising

Business Hours are Monday - Friday, 8am-5pm. Building location is the first floor of Oregon Hall

EM DC PJ 3 People

View individual availabilities

Fri, Jul 23rd

1:30 - 2:00 PM 2:00 - 2:30 PM 2:30 - 3:00 PM 3:00 - 3:30 PM 3:30 - 4:00 PM 4:00 - 4:30 PM 4:30 - 5:00 PM

Mon, Jul 26th

7:00 - 7:30 AM 7:30 - 8:00 AM 8:00 - 8:30 AM 8:30 - 9:00 AM 9:00 - 9:30 AM 9:30 - 10:00 AM 10:00 - 10:30 AM 10:30 - 11:00 AM 11:00 - 11:30 AM 11:30 - 12:00 PM 12:00 - 12:30 PM 12:30 - 1:00 PM 1:00 - 1:30 PM 1:30 - 2:00 PM 2:00 - 2:30 PM

Show more

Tue, Jul 27th

7:00 - 7:30 AM 7:30 - 8:00 AM 8:00 - 8:30 AM 8:30 - 9:00 AM 9:00 - 9:30 AM 9:30 - 10:00 AM 10:00 - 10:30 AM 10:30 - 11:00 AM 11:00 - 11:30 AM 11:30 - 12:00 PM 12:00 - 12:30 PM 12:30 - 1:00 PM 1:00 - 1:30 PM 1:30 - 2:00 PM 2:00 - 2:30 PM

Virtual Check-ins – NEW! (optional)

This new, optional feature can be enabled by location (department) in Navigate. If enabled, when students have a scheduled appointment in Navigate, they will see a check-in button in the Navigate app > appointments, or the Navigate website > Upcoming Appointments. When they check in, they will appear in the advisor's appointment queue in Navigate.

UNIVERSITY OF OREGON TEST

NAVIGATE

Terms Spring 2021 SA

Student Home

Class Information Reports Calendar

Courses This Term

COURSE	PROFESSOR	DAYS/TIMES	MID	FINAL
UNIC 150-35276 Structur English Words	Doris Payne			
PDMA 116 36544 Women's Self Defense	Ryan Kelly			
PDMA 116 36531 Women's Self Defense	Jessica Stainbrook	Ended on 06/06/2021 F 8:15am - 9:45am PT REMOTE-00		
PHIL 101 34443 Philosophical Problems	Juan Sebastian Ospina	Ended on 06/06/2021 MTWR 9:30am - 10:30am PT REMOTE-00		
PHIL 340 35483 Environmental Philos	Barbara Muraca	Ended on 06/06/2021		

Schedule an Appointment

Quick Links

Take me to...
School information

Current Visits

You have no current visits

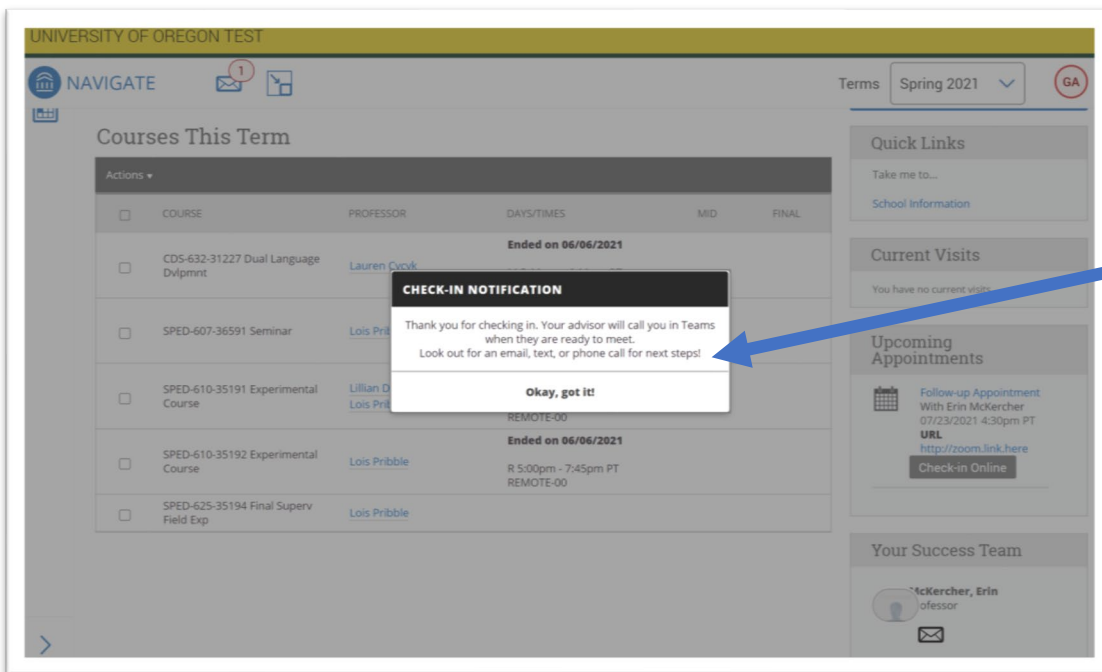
Upcoming Appointments

Follow up Appointment With Erin Molcher 07/23/2021 4:00pm PT
URL <https://zoom.us/j/123456789>
Check-in Online

UO Navigate Scheduling Updates: Summer 2021

The virtual check-in setting currently applies to both appointments and drop-ins. This means that if your department uses the drop-in queue, and you'd like to enable virtual check-ins for student appointments, it will also enable virtual drop-ins, which will allow students to virtually drop-in and add themselves to the drop-in queue via Navigate.

When students check-in virtually through Navigate, they see a custom message from that department. However, even with the custom message, the software automatically adds the sentence, "Look out for an email, text, or phone call for next steps!" We look forward to a future release that will remove this sentence and only use the custom message.



Navigate Support

Please reach out by email to schedule a time to connect and we can review these features and talk about your fall resumption plans!

Erin McKercher
Advising Technology Manager

navigate@uoregon.edu