Appointment Scheduling User Guide for Calendar Managers

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Before you can Manage a User’s Calendar

User adds location(s) for their meetings.

1. The user will need to do this themselves.
2. They will click the “Add Location” button to set appointment location(s). Multiple locations can be set. Users must have at least one location available and their minimum appointment length set in order to offer appointments in NYU Connect.

3. First select a type, then enter the location name.
   - Instructions should give information about where to find the user, and must be less than 100 characters. Some offices have created a uniform language for the instructions. For example:
     i. Type: Phone
     ii. Name: Phone
     iii. Instructions: Please call 212-998-4020 at the time of your appointment. All appointments are held in EST.
   - You will have another opportunity to enter instructions for the student when you set-up office hours for the user.
User adds you as their Calendar Manager

1. The user whose calendar you manage will need to click the “Add Calendar Manager” button to add you to their calendar.

2. They can start typing your name. Search results will begin to populate. The user should select you from the search results and click “Submit”.

   a. If they need to remove you, the user can go to the Calendar Manager page of their Profile and use the delete icon (circle with an x) next to your name.

Creating and Managing a User’s Office Hours

Create Office Hours for the user

1. Click the hamburger menu in NYU Connect then “Appointments”.
2. Check off the user(s) calendar(s) that you want to add office hour blocks to - and make sure your calendar is unchecked.
   ○ If you manage more than one user’s calendar: Some managers have found it helpful/faster to have all of the calendars you manage checked. Then when you go to schedule office hours all the names are listed and you can simply click through the names instead of checking and unchecking one by one and waiting for the refresh.

3. Click the “Office Hours” button to add office hours for the user.

4. Enter the details for the office hours by completing the following:
   a. Add a title for the our office hour block.
      ○ Students see this title on the user’s profile and when they are scheduling with them.
   b. Choose certain days, times and locations for the office hours to occur.
c. Specify the Office Hour type (this displays to students) and the minimum and maximum appointment lengths (this does not display).

d. Include additional information in the “Instructions” box.

e. Click the “Start/End Date” box to set dates for when the user’s Office Hours should begin and end for the term.
   - Users can opt to set office hours through the end of the term, the end of the day based on a specific date, or after a certain number of occurrences. Note that the calendar integration is for 90 days in the future, so you may want to take this into account when you decide how far out to offer office hours.

5. Click “Submit”.
6. If you get an error, there are two possibilities:
a. You are trying to create Office Hours that overlap with an already existing Office Hour block. You will need to adjust one of the blocks so that there is no overlap.

b. You are trying to create Office Hours that overlap with an already existing appointment made in NYU Connect. You will need to either adjust the block, or cancel the appointment, create the block, and then reschedule the appointment within the block.

c. Always feel free to reach out to nyuconnect@nyu.edu with questions!

**Edit Office Hours**

1. Click the hamburger menu, then click “Appointments”.
2. Select the user’s calendar to edit on the left sidebar.
3. Find the existing Office Hour block, and hover over the office hours menu icon next to the title. This will open the Office Hours pop up card.
4. Click “Edit”.

5. An “Edit Office Hours” display page appears. This is the same page with the options you used to set up the original block.
6. Make edit(s) as necessary and then click “Submit”.

Cancel Office Hours

1. If you are unable to hold office hours you already set up, you can either:
   - Add a hold on the user’s NYU GCal which will remove your NYU Connect availability if you do not have appointments scheduled during the block, or
   - Cancel the office hour block(s) in NYU Connect so you can send a message to student(s) scheduled during that time.
2. To cancel in NYU Connect:
   - In the Appointments Screen, select the user’s calendar on the left sidebar. Then, using the daily or weekly view, hover over the office hours menu icon next to an office hour title to open the Office Hours pop up card. Click “Cancel”.
   - If the block is a part of a series, you have the option to cancel one occurrence or the entire series.
3. Send a message to the student(s) that have appointment(s) in the block.
Schedule an Appointment

1. You can schedule an appointment for a user directly on the appointment calendar by using the “Sign Up” button.

2. Alternatively, you can find the student to schedule an appointment with via the upper-right search bar. You can search by preferred name, NetID, N#, or Empl ID. Schedule an appointment from the Student’s Folder by clicking the “Appointment” button.

Tip:
- If not scheduling directly from the appointment calendar screen, you may want to have the user’s calendar open in another tab to make sure that you are trying to schedule for an open slot. When adding an appointment, the system will not tell you if the user is available, so it may be helpful to check prior to trying to schedule so you don’t get error messages. Other managers have found it helpful to have the appointment daily calendar open in one tab and then another tab of NYU Connect open for searching for students and utilizing other functions.

2. Select the user’s calendar that you are scheduling for.
3. Enter appointment details.
4. The information you enter in the “detailed description” field will be a part of
   the email and GCal invite the student receives.
5. Click “Submit”.
   - The user and the student will receive an email confirmation and GCal
     invite.

**Student Experience/Guide for Scheduling**

Should you need information on the steps for how a student can set-up an
appointment in NYUConnect, visit the [student page](#) of NYU Connect.