Outlook Calendar Sync

Syncing Your BHSC & Outlook Calendars

Outlook Calendar Sync – Please read instructions – must complete Outlook set-up before attempting to sync within BHSC platform!

1. **Before Getting Started**: Calendar sync provides advisors with the ability to link their Outlook calendars with their Blue Hen Success Collaborative platform calendar. Calendar sync provides advisors with the ability to efficiently manage their meeting schedule/appointments within their Outlook calendar in conjunction with their advising appointments of their BHSC calendar.

   □ **Please note**: Unlike the UDSIS Appointment System, the BHSC calendar/appointment system does not display available appointments within the platform’s calendar. Meaning, an advisor that creates availability within the BHSC platform, will NOT have that availability sync back into their Outlook calendar. The BHSC platform DOES capture scheduled appointments within the calendar. Once an appointment is created (and no longer just generic availability) that is when the calendar sync will occur and the appointment will read into Outlook.

2. **Step One**: Within your Outlook calendar, navigate to the Outlook Calendar toolbar and select *Calendar Permissions*.

3. **Step Two**: Click *Add* and under the Global Address List, search for *BHSC Campus*. (Email address of DEM-BHSC-Campus@win.udel.edu.)

4. **Step Three**: Click *Add* and *OK*. Under the Permission Level, give the BHSC Campus the permission level of *Editor*. Click *OK*.
5. **Step Four:** Login to the BHSC platform and navigate to the left-hand menu and select the Calendar page. Click on the Subscriptions tab.

6. **Step Five:** Click Setup Exchange Calendar Integration.

7. **Step Six:** Click the Connect with Exchange blue button.
8. **Step Seven:** Wait while UD/EAB connect to your accounts and sync your calendars. *This process can take several minutes so you are welcome to navigate to other business and return to the platform later.* After the sync is complete, you should see Enabled displayed on the screen. From here, click back to the Calendar View tab to view the appointments (busy times) that have synced.

9. **FYIs:**

   □ **Outlook Details:** Currently, appointments made within the platform that synchronize into your Outlook appear as SSC: Advising as the Subject. If you click into the details of the appointment, you will see the student’s name. UD has requested an enhancement to change the “SSC: Advising” Subject title and to include additional info in the details, such as UDID#.

   □ **Managing Your Availability:** It is important for advisors to be cognizant of the availability you have created within the BHSC platform and ensure that you manage that availability by maintaining your busy times within your Outlook calendar. For example, if you create BHSC availability MWF 8:00-10:00 and then have a conflicting meeting one Friday at 9:00, ensure that the busy time of that meeting is entered into your Outlook calendar. The platform will read this busy time and understand that you are no longer open for availability on that specific day/time. *Unless told otherwise by the details within your Outlook calendar, the platform is going to assume you are available for any availability created within the platform.*

   □ **Cancelling a Created Appointment** – If after an appointment is created and you need to cancel it, navigate to the BHSC Advisor Home – Upcoming Appointments tab to cancel the appointment. EAB encourages use of cancellations vs. deleting the appointment altogether because there are analytics that can report off of cancelled appointments (vs. deleted appointments disappear from the platform altogether.)

   □ **Busy & Tentative vs. Free Times** – The BHSC calendar reads Busy & Tentative times synced from your Outlook calendar. For example, if you schedule an appointment in Outlook calendar with a Show As: Free Time – that time will NOT sync back into your BHSC calendar. However, if you schedule an appointment in your Outlook calendar with a Busy time, that time WILL REMOVE that option from your BHSC appointment availability – the time options students see to select to meet with you. Therefore, advisors are recommended not to use Outlook calendar timeslots with Busy times for general reminders/random filler – only actual events that you want to trump/limit your BHSC advising availability.
- **Private** – The BHSC calendar will NOT sync/read Outlook appointment details marked Private. Therefore, advisors are recommended to create a second duplicate Busy appointment (not marked Private) if they wish for their availability within BHSC to understand the appointment date/time implications.

- **Reoccurring Meetings** – In order for reoccurring Outlook meetings to sync properly over to the BHSC calendar, it is necessary for advisors to select an end date for the reoccurrence. Reoccurring meetings with no end date will not be properly recognized/enforced by the BHSC calendar.

- **Sync Time** – The sync time between Outlook and BHSC should occur fairly immediately. When asking EAB for a specific amount of time, they said that it should be within minutes – that it could be as long as 5-10 minutes – but usually fairly quickly and that they are always working to improve the synchronization times.