Navigate Guide

Your Institution has launched the Navigate platform for staff, faculty, advisors and others with the goal of helping students explore a path to timely graduation completion. Navigate can help enable this with data, services, and supportive connections. Use this Quick Start Guide to make the most of your experience.

GETTING STARTED

Login to Navigate using your university credentials!

Live Site: https://INSTITUTIONNAME.campus.eab.com/

Configure Availability and Calendar for Appointment Scheduling

- **Set Up Your Availability** - This is an important first step that will allow you to then create appointments with students by selecting the 'Add Time' from your Staff home screen - see Appendix A for detailed instructions on setting up your Availability.

- **Sync Your Calendar** - This initiates the two way sync between Navigate and your Outlook Calendar. See Appendix B for detailed instructions.

KEY PLATFORM FEATURES

Perform These Key Actions to Identify, Communicate With, and Support Students

- **Reference the Student Profile –** After clicking on a student's name through the search results, your Staff Home, or the Quick Search, note their academic progress and any areas of concern with the various tabs on a student's profile

- **Add Notes or Advising Summary Reports –** Record your interactions and follow-ups from student meetings by adding an Advising Summary Report (record associated with an appointment) or a Note (general record not associated with a specific meeting)

  - Both are accomplished through the 'Actions' menu on your Staff home or search results, or from a student's profile.

  - **Reminder!** For scheduled appointments, add summary reports from the "Upcoming Appointments" tab of the staff home.

- **Mass Email a Group of Students –** Use 'Send a Message' from the 'Actions' drop-down to contact your Assigned Advisees list or other lists you've created in the platform.

- **Create an Appointment Campaign -** Use this to invite students set up an advising appointment during times you have designated – See Appendix C for detailed instructions

Learning Your Home Page

Professor Home

The Professor Home page is where most faculty users arrive when opening Navigate. It allows users to view key tools that enable them to **take action** on student success-related tasks, such as filling out Progress Reports, recording class attendance, or managing assignments.
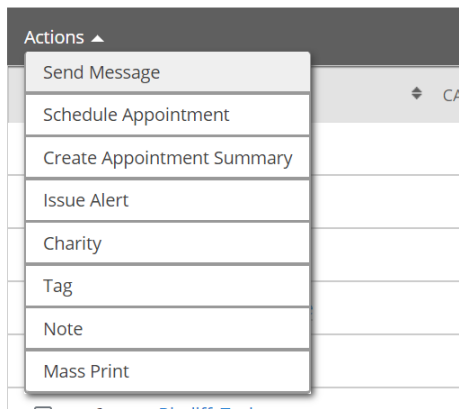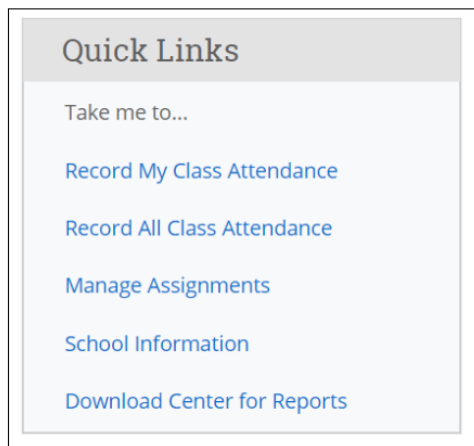
Students In My Classes

	INDEX	STUDENT NAME	CATEGORY	COURSE(S)
☐	1	Aaberg, Annette		54321-Section 1
☐	2	Aagaard, Sheila		54321-Section 1
☐	3	Aavang, Marnie	Gymnastics, Rock Climbing Club	54321-Section 1, 54321-Section 2
☐	4	Aquil, Amos		54321-Section 1
☐	5	Arrington, Azura		54321-Section 1

If you are a faculty member who is teaching a course in the current term, the course information will be outlined in the **Class Listing** section of the Professor Home Page. In addition to the class name, time, and room (if specified), you will also be able to view assignments or progress report campaigns for a given course by clicking the links on the right hand side of the box.

Students In My Classes

Actions ▲
- Send Message
- Schedule Appointment
- Create Appointment Summary
- Issue Alert
- Charity
- Tag
- Note
- Mass Print

You can **take action** on a student or students in your classes by checking the box in front of their name and selecting the Actions menu. Common actions include sending messages, issuing alerts, or creating notes.

Quick Links

Take me to...
- Record My Class Attendance
- Record All Class Attendance
- Manage Assignments
- School Information
- Download Center for Reports

The **Quick Links** box is a section on your Home page that provides easy access to different features within the platform, such as those that help with recording attendance or managing assignments. Clicking on a quick link will direct you to different locations in the Navigate platform. The links that display are specific to your role at your institution and may not exactly mirror those shown in the screenshot below.

Messaging Students

Email and Test Messaging

The Navigate platform provides both **email** and **text** messaging for faculty and staff to communicate with students, either individually or en masse. Communicating with students through the platform creates records of those communication which can be accessible by other staff or faculty on your campus. In addition, it allows for a quick and easy way to communicate with more than one student at once..
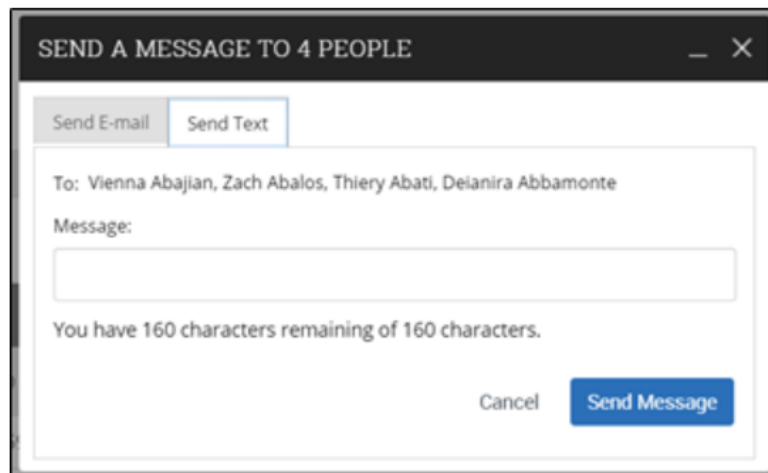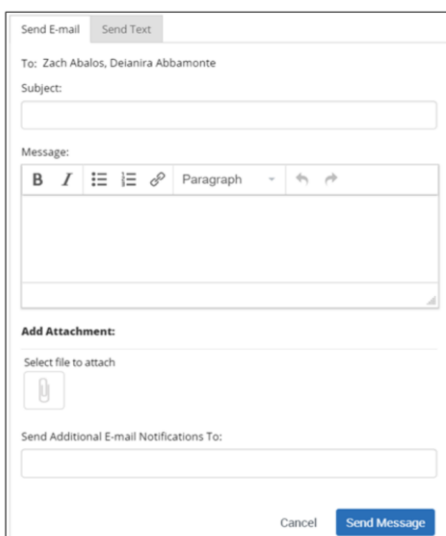
You can send emails or texts to one or more students from your staff homepage, the student profile, or the advanced search. Most "Actions" menus throughout the platform allow for sending emails or texts. See below for screenshots of each of these locations
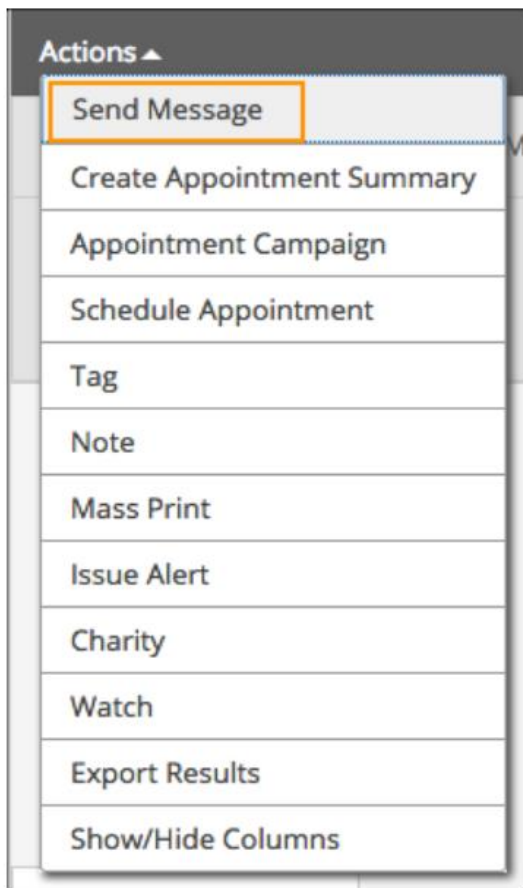
From Staff/Professor home page and/or the Advanced Search
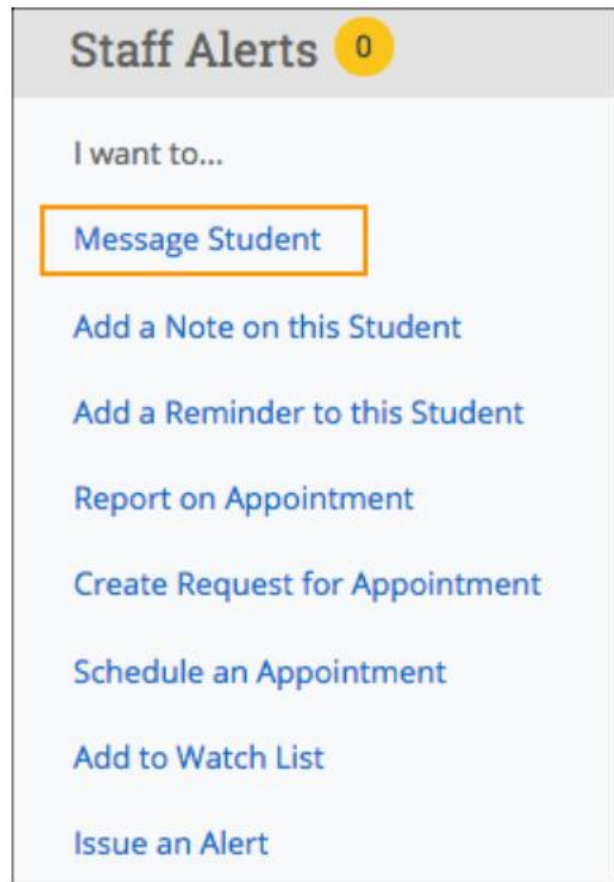
From Student Profile

Sending an email or text message to more than one student will blind copy all students. In other words, the student **will not** know that the message was sent to more than one student. For both email and text, it will look like the message was only sent to them.

eab.com

Viewing Student Data

The Student Profile

The Overview tab is organized into several different sections. The top gray box, also known as the **30-Second Overview,** offers faculty and staff the opportunity to gather a basic understanding or "gut check" on the student's academic performance to date.

The data includes course performance (number of Ds and Fs, number of repeated courses, and number of withdrawn courses), number of success marker notifications, GPA (GPA type depends on institution configurations), credit performance (number of credits earned, percentage of credits completed vs. attempted), and the student's Predicted Risk Level (calculated by the institution's predictive model). Note that when you click on a number in the 30-Second Overview, only the first ten examples will appear.

| Overview | Success Progress | History | Class Info | Major Explorer | Path | Academic Plan | More ▼ |

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	Cumulative GPA
2 ▼	1 ▼	1 ▼	0	2.42 ▼

Total Credits Earned	Credit Completion % at this Institution	Support Level
0.00	94%	View detail

On the right side of the Student Profile, staff and faculty can find additional general information about the student (such as their age and contact information) and take action within the platform. Depending on permissions, this can include actions such as scheduling an appointment for the student, adding documentation to the student's profile, adding the student to a student list, or issuing an alert on the student.

Staff Alerts 0

I want to...

Message Student

Add a Note on this Student

Add a Reminder to this Student

Report on Appointment

Create Request for Appointment

Schedule an Appointment

Add to Student List

Issue an Alert

Setting Up Your Availability

Availability

As a new user, the first thing you need to do is set up availability so that students can schedule appointments to see you. It is important to note that locations and services are created by university administrators.

	Assigned Students	Availabilities	Appointments	Conversations	Calendar

Available Times

Actions ▼

SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
○	Mon, Tue, Wed, Thu, Fri	8:00a-5:00p	Forever	Student Support Center	Advising with Fiona, Career Counseling, Choosing Schedule For: Appointments/Campaigns	Advising Whitehurst University	Edit

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ADD AVAILABILITY ✕

When are you available to meet?

Mon	Tue	Wed	Thu	Fri	Sat	Sun

From
8:00am

To
5:00pm

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

How long is this availability active?
Please select a duration ▼

What type of availability is this?

Appointments	Drop-ins	Campaigns

Care Unit
Please select a care unit ▼

Location
Please select a location ▼

Services
Please select services

URL / Phone Number

Special Instructions for Student

Cancel   **Save**

Add Time -

Step 1: Click the Add Time button in the Actions Menu

Step 2: Select the days and times when you are available to meet with students.

Step 3: Select whether you will meet with students via appointments or drop-ins during that time. The campaign option is availability reserved specifically as dedicated time for targeted students to make appointments with you.

Step 4: Choose the location where you will be available.

Step 5: Select which student services you can provide to students during this availability. Note: Leaving this student services field empty means you will appear to be available for all advising student services.

Steps 6-8 Continued on next page...

Setting Up Your Availability

Special Instructions for Student

e.g. room 23, please bring paper

Will you be meeting with multiple students?

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

Max Number of Students per Appointment

1

Step 6: Option to include a virtual URL (a link to the advisor's Zoom for example) in staff availability and to also draw more attention to this for students as they are scheduling and getting reminders.

Step 7: Use the Special Instructions box under "Add Availability" to include personalized information, such as your office room number and location.

Step 8: Click the Save button.

Step 9: Repeat this process until all of your availabilities have been defined.

• You can have as much availability as needed.

• Creating multiple availabilities will enable you to set aside specific blocks for specific services (registration advising for example) or meeting types (drop ins vs. scheduled appointments)

Editing Availability:

Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied and a dialog will open allowing you to make edits or to save your newly created availability.

Delete Time- to delete your time, simply select the time and click the Delete Time button.

Group Appointments - You are now able to create availability for group appointments by indicating how many students are able to schedule into the same appointment.

Inactive availabilities are highlighted in red in the Times Available grid.

Syncing Your Outlook Calendar

Integrating Your Calendar

<div style="background-color: yellow">

PLEASE ONLY SYNC ONE CALENDAR

</div>

The availability you set up within Navigate dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate to your personal calendar.

My Calendar

Calendar View | List of Calendar Items

Exchange Integration

Integrate Calendar Information From Exchange

Disable integration with Exchange

Enabled
Synced at 09/27/2018 03:07 PM

Re-sync with Exchange

Exchange Mailbox

KRISTIG@CLEMSON.EDU

Please verify this email is your Exchange mailbox.
Contact support if the email needs changing.

⚙ Settings and Sync

Proceed to the "Settings and Sync" button on the right and then select only "Set-Up Exchange Integration", the third option on the right. The next screen will prompt you to enter your email address and then hit the blue "Connect with Exchange" button.

Creating an Appointment Campaign

Navigating to Campaigns: While on the staff home screen, select "Appointment Campaigns" from the left hand side Quick Links section. This will take you to the Campaigns tab. From there, select Appointment Campaign from the right hand side, under Actions.

Define Campaign:

- o Name your campaign (Students will not see the name of the campaign)
- o Select "Advising" as the Care Unit (or the applicable Care Unit for your campaign)
- o Location- Choose your location. NOTE: Ensure that for the campaign availability you have created under "My Availability" you have selected that you will be available in the same location (Advisor's office).
- o Under "Service", choose the services for which you are available. NOTE: This must match the availability you have set up on your staff home page, under "My Availability".
- o Begin Date and End Date- choose the date range for which you want the campaign to run. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired. NOTE: This must match the availability you have set up on your staff home page, under "My Availability".
- o Appointment Limit- how many appointments can the student schedule for the campaign? (default is 1)
- o Appointment Length- how long do you want the appointment to last?
- o Select 1 slot per time (select more if you'd like more than 1 student to select the same time slot)

Adding Students: Use the advanced search feature to search for students you would like to participate in the campaign. Or, choose one of your saved searches by clicking the drop down arrow beside "Saved Searches".

Review Students In Campaign

Actions ▼	
☐	NAME
☐	Badura, John
☐	Brimage, John
☐	Cabading, John
☐	Carson, John

Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under "Add Advisors to Campaign". If applicable, select other advisors to join your campaign.

Compose Your Message:

- o Create a Subject Line for your email
- o In the next box, edit the text for the email. Default is "Please schedule your advising appointment". NOTE: Always be sure to keep the Schedule Link in your email body, if that is removed students will be unable to schedule appointments.

Confirm & Send: Review the details of your campaign. When you are ready, click send to issue the email to students on the list.

Need Help? Access EAB's Help Center

Visit the Navigate Help Center for articles and how-to instructions on all Navigate Features and Workflows.
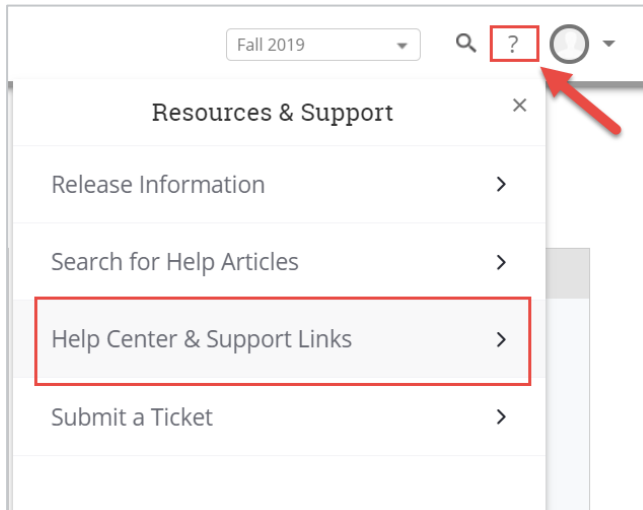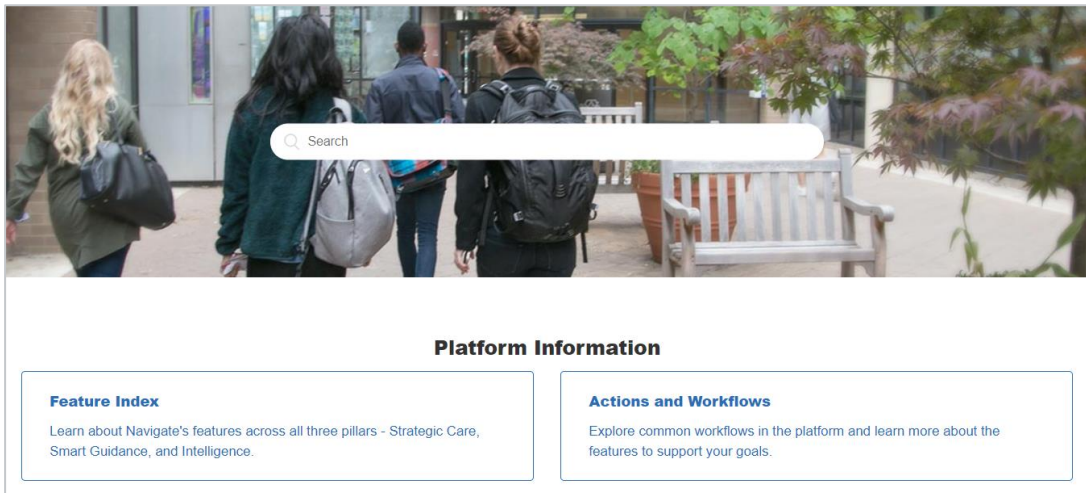

Accessing the Help Center -

Step 1: Log in to Navigate

Step 2: Click on the question mark icon in the top right hand corner.

Step 3: Click Help Center & Support Links from the drop down menu

Step 4: Select Help Center to be taken to articles and step by step instructions for Navigate features and workflows

Additional Questions? Email your strategic leader for support!