Student Success Collaborative
Navigate

Quick Start Guide for Navigate

GETTING STARTED

1. Log in to Navigate using your SSO credentials!

PRODUCTION SITE URL: https://ucabears.campus.eab.com/ – **start using on August 8, 2021**

2. 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 calendar. *See Appendix B* for detailed instructions. **You will need to disconnect your calendar from GradesFirst, before syncing with Navigate.**

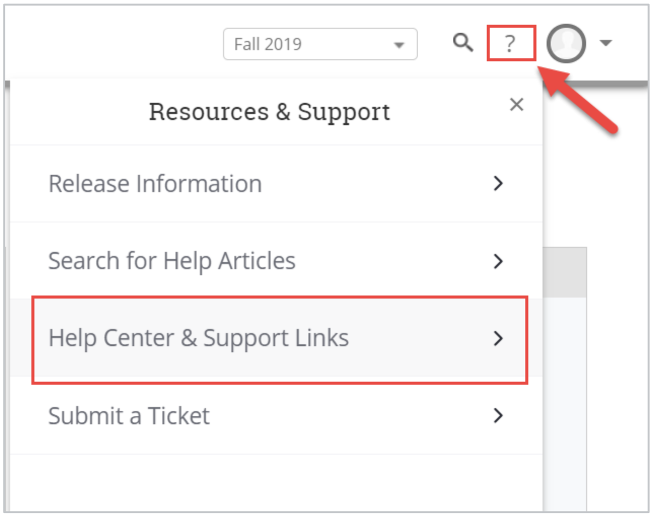
KEY PLATFORM FEATURES

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 Appointment Summary Report (record associated with an appointment) or a Note (general record not associated with a specific meeting) – see *Appendix C.*
  - Both are accomplished through the 'Actions' menu on your Staff home or search results, or from a student's profile.
- **Mass Email and Text a Group of Students –** Use 'Send a Message' from the 'Actions' drop-down to contact your advisees or other lists you've created in the platform – see *Appendix D.*
- **Create an Appointment Campaign -** Use this to invite students set up an appointment during times you have designated –
  - From the 'Actions' menu on your list, select 'Appointment Campaign' – See *Appendix E* for detailed instructions on creating a campaign.

Need Help? Access EAB's Help Center

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



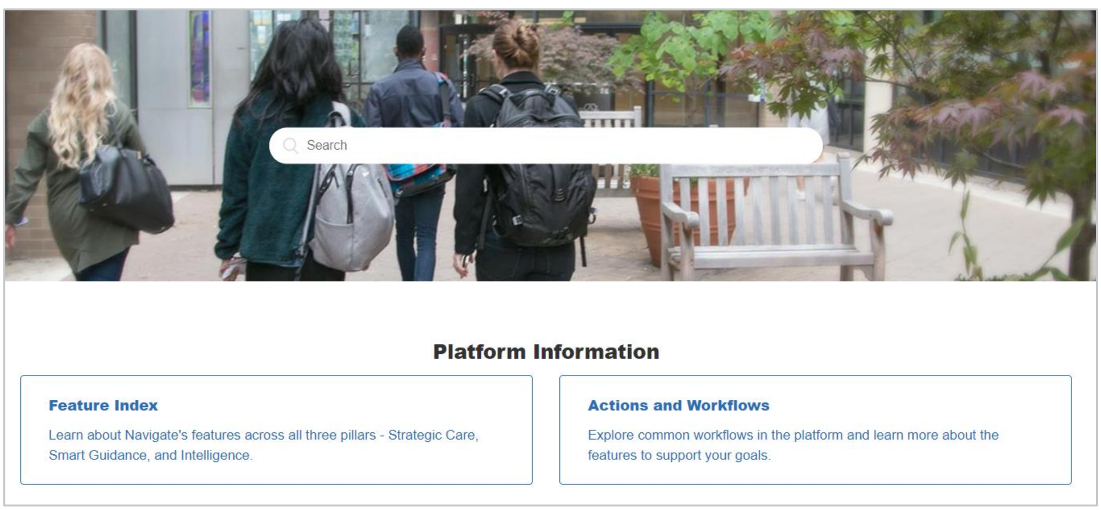
Accessing the Help Center -

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



Tip:
Links to feature-specific articles in the Help Center are found at the bottom of each page of this document (look for this icon)

For more detailed guidance, check out the Help Center!

Additional Questions? Email navigate@uca.edu for support!

Expectations: What should you be using Navigate for?

Workflow	Advising	Athletics	Faculty
Review student profile before appointment	- Student Overview, Categories, Success Progress, History, Course Info, and Path tabs	- Student Overview, History, Alerts	- Student Overview, Categories, History, and Course Info tabs
Capture details about advising interactions	- Add advising summary report after each appointment (Advising Care Unit) - Drop-ins: Student Profile -> Report on Appointment - Campaigns: Upcoming Appointments tab	- Add advising summary report after each appointment (Athletics Care Unit) - Drop-ins: Student Profile -> Report on Appointment - Campaigns: Upcoming Appointments tab	- Phase II
Contact students through navigate	- Email and text students - Create Searches and Student Lists to contact students from Advanced Search	- Email and text students - Create Searches and Student Lists to contact students from Advanced Search	- Email and text students enrolled in your courses
Schedule appointments	- Set up availability for Appointments and Drop-Ins (Advising Care Unit) - Send Appointment Campaigns, as needed	- Set up availability for Appointments and Drop-Ins (Athletics Care Unit) - Send Appointment Campaigns, as needed	- Phase II
Issue alerts	- Issue ad hoc alerts and review cases	- Phase II	- Issue an Alert on students for referrals - Progress Reports
Analytics & Reports	- Review reports	- Review Study Hall & Student Info reports	- Review Attendance and Assignments Report

Expectations: What should you be using Navigate for?

Workflow	Financial Aid	Library	Student Accounts
Review student profile before appointment	- Student Overview, Categories, Success Progress, History, Course Info tabs	- Student Overview, History, Alerts tabs	- Student Overview, Categories, History tabs
Capture details about advising interactions	- Add advising summary report after each appointment (Financial Aid Care Unit) - Drop-ins: Student Profile -> Report on Appointment - Campaigns: Upcoming Appointments tab	- Add advising summary report after each appointment (Library Care Unit) - Drop-ins: Student Profile -> Report on Appointment	- Add advising summary report after each appointment (Student Accounts Care Unit) - Drop-ins: Student Profile -> Report on Appointment
Contact students through navigate	- Email and text students	- Phase II	- Phase II
Schedule appointments	- Set up availability for Appointments and Drop-Ins (Financial Aid Care Unit) - Appointment Campaign guidelines (Phase II)	- Set up availability for Appointments and Drop-Ins (Library Care Unit)	- Set up availability for Appointments and Drop-Ins (Student Accounts Care Unit)
Issue alerts	- Phase II	- Phase II	- Phase II
Analytics & Reports	- Phase II	- Review Student Info report	- Phase II

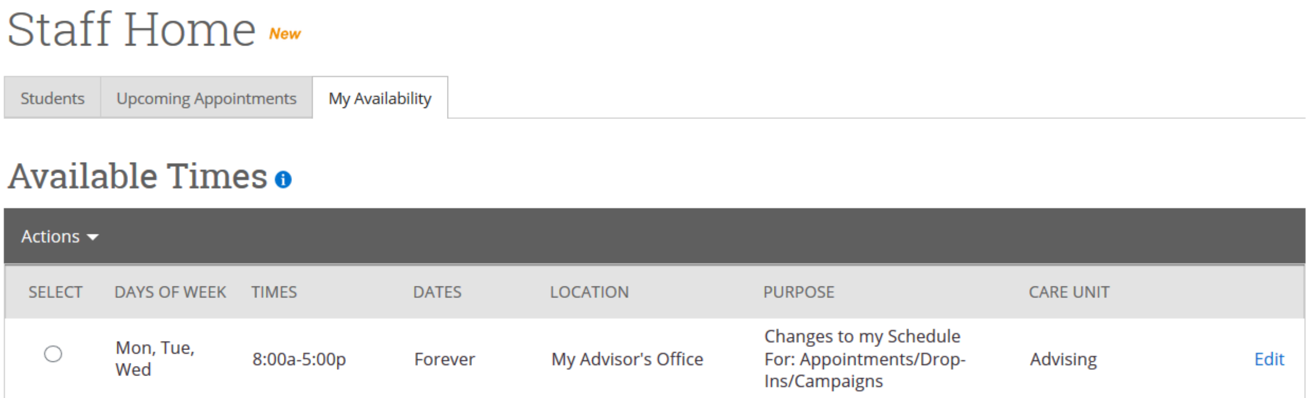
Expectations: What should you be using Navigate for?

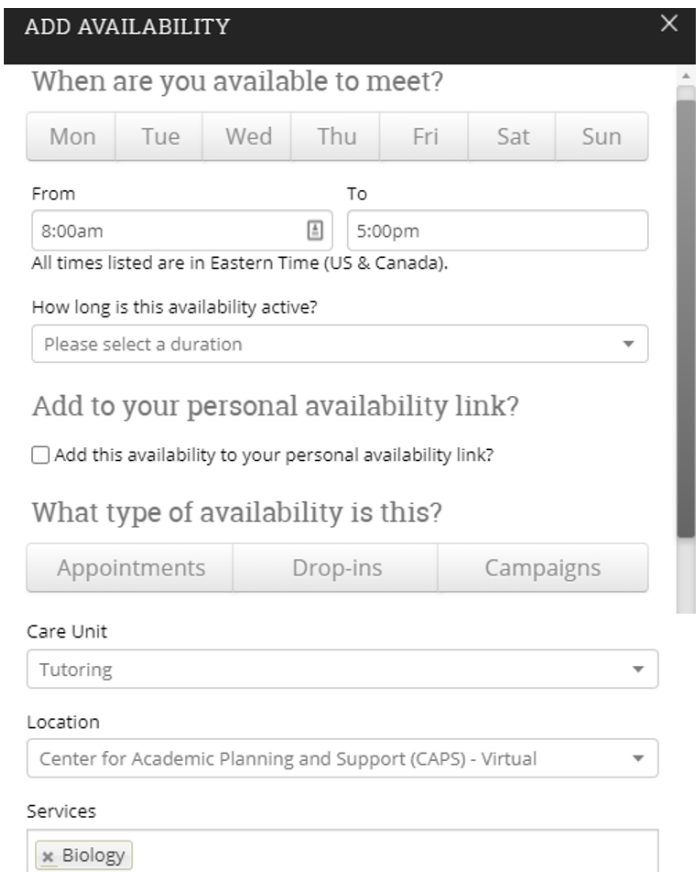
Workflow	Student Success & Coaching	Tutoring & Supplemental Instruction	Academic Leadership
Review student profile before appointment	- Phase II	- Review student overview	- Student Overview, Categories, Success Progress, History, Course Info, Path, Appointments, Conversations, Alerts tabs
Capture details about advising interactions	- Add advising summary report after each appointment (Student Success & Coaching Care Unit) - Drop-ins: Student Profile -> Report on Appointment	- Add advising summary report after each appointment (Tutoring & SI Care Unit) - Drop-ins: Student Profile -> Report on Appointment	- N/A
Contact students through navigate	- Email and text students	- Email students	- N/A
Schedule appointments	- Set up availability for Appointments and Drop-Ins (Student Success & Coaching Care Unit) - Appointment Campaign guidelines (Phase II)	- Set up availability for Appointments and Drop-Ins (Tutoring& SI Care Unit) - Appointment Campaign guidelines (Phase II)	- N/A
Issue alerts	- Phase II	- Phase II	- Issue ad hoc alerts and review cases
Analytics & Reports	- Phase II	- Phase II	- Review Analytics & Reports in platform - Leverage Advanced Search

Appendix A: 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 institution administrators.





Add Time -

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

Step 2: Select the days as well as start and end time in the *From* and *To* fields.

Step 3: Set the length of the availability with the *How Long Is this Availability Active?* field.

Step 4: If you want this availability added to your personal availability link, select *Add This Availability to Your Personal Availability Link?* You can put the personal availability link in an email or text or on a website. Students are taken to a scheduling workflow that has the staff/faculty's chosen availabilities pre-filled. (**Note**: Personality Availability Link only works for regular Appointments, not for Drop-in's and Campaigns)

Step 5: Select your Availability types. You can choose more than one at a time. For example, an availability can be for both Drop-In and Appointments.

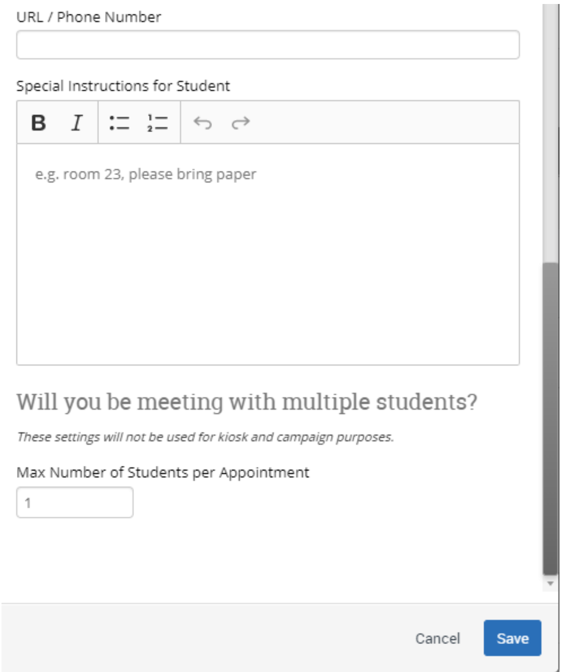
Step 6: For Care Unit, select Advising.

Step 7: Choose the location where you will be available.

Step 8: Select services you can provide students during this availability. You must choose at least one service but can pick more.

Steps 9-11 Continued on next page...

Appendix A: Setting Up Your Availability



Step 9: In the *URL / Phone Number* field, add your meeting link for your appointments.

Step 10: Use the *Special Instructions* box to include additional details for students. *(Example: We will use Zoom for our meeting, which you can access by using the link provided. Virtual meeting spaces allow us the flexibility to connect from various spaces. Please ensure the space you are in is conducive for such a meeting. I very much look forward to meeting with you!)*

Step 11: If you want to hold group appointments, you can specify the number *under Max Number of Students per Appointment.* Otherwise, you can leave is as 1 for one-on-one appointments.

Step 12: Click the Save button.

Step 13: Repeat this process until all 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.

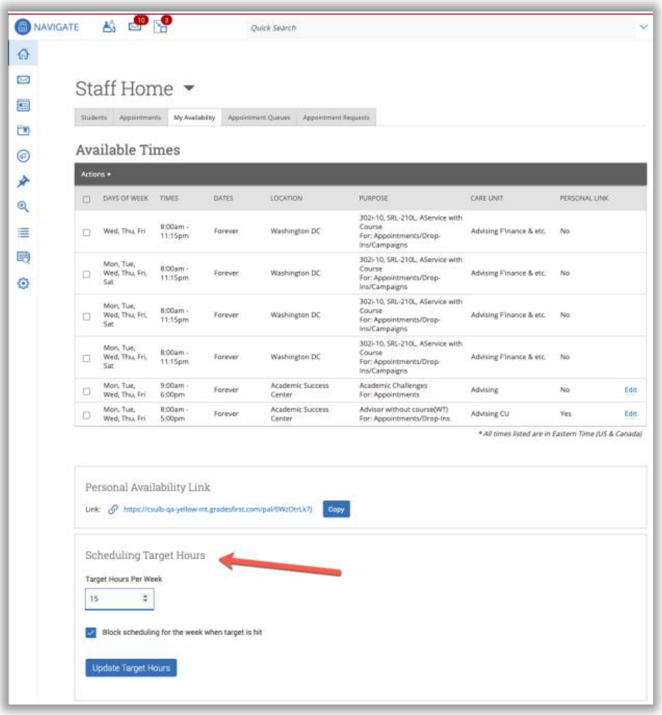
Delete Time- to delete your time, simply select the time and click the Delete Time button.

Group Appointments - You can create availability for group appointments by indicating how many students are able to schedule into the same appointment (indicate specific number under "Max Number of Students per Appointment")

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

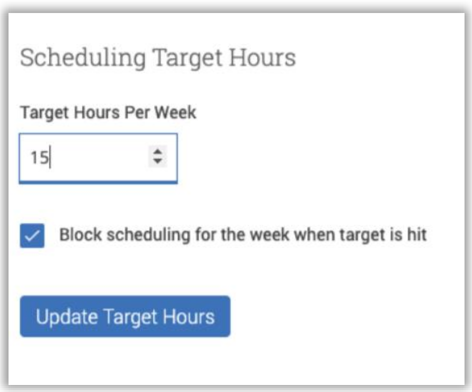
For more detailed guidance, check out the Help Center!

Appendix A: Setting Up Your Availability & Target Hours



Target Hours allow staff to restrict the number of hours in which they can be scheduled for appointments via Student Scheduler.

- Staff set their Target Hours in the **Scheduling Target Hours** section.
- Target Hours have two aspects:
    1. ***Target Hours Per Week:*** This is the maximum number of hours per week in which they can be scheduled for an appointment. (You can set this between 1-168 hours.)
    2. ***Block scheduling for the week when target is hit:*** If selected (and hours have been reached), the staff member will no longer be available to students for appointments for the remainder of the week.
- **Note:** Target Hours are calculated against all Services, Locations, and Care Units. Your Leadership Team will provide clarification on how this feature should be used.



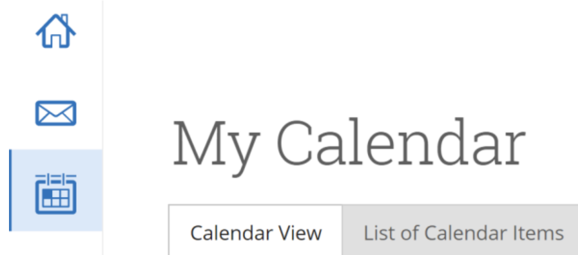
Appendix B: Sync Your Google Calendar

Integrating Your Calendar

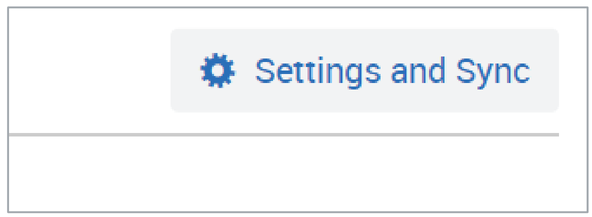
PLEASE ONLY SYNC YOUR CALENDAR IN THE PRODUCTION SITE

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.

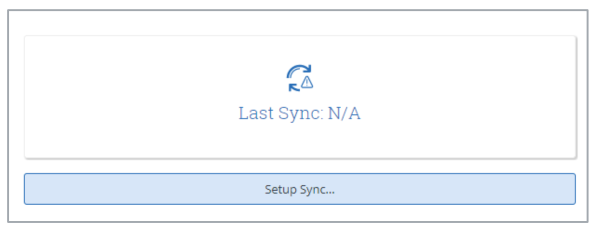
Step 1: Click on the Calendar Icon on the left side toolbar (third icon from the top).



Step 2: Click "Settings and Sync" in the upper right-hand corner

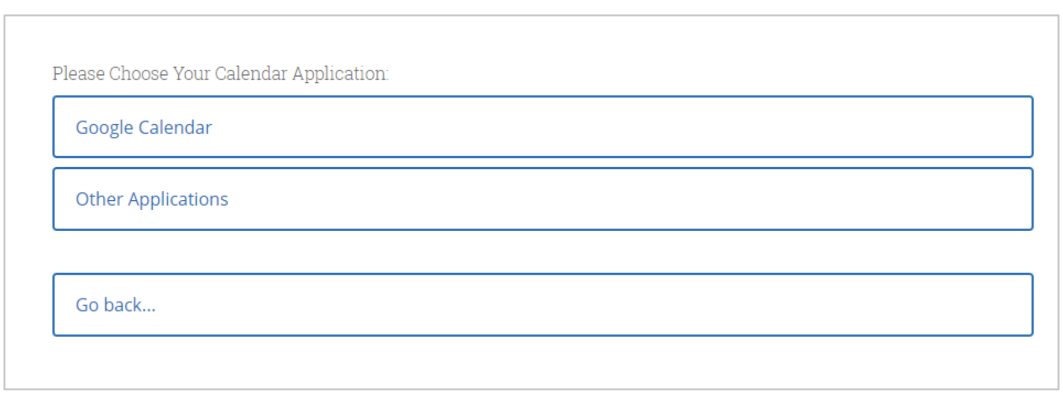


Step 3: Click "Setup Sync..."



You can now sync your calendar by clicking the "Google Calendar" button. You will be prompted to complete the sync from your Gmail account confirming your request to sync. Click "Allow". You will then be relocated back to Navigate. Click on the drop down for "**calendar for two-way sync**" and select your Gmail address. Finally, click the "Save and Update" button. This should complete your calendar sync. Please log into Gmail to view your calendar and compare it against the calendar within Navigate. You can reach out to your Business Analyst for any technical questions. You can also reach out to your Dedicated Consultant for management and use of the calendar from a functional aspect.

The Two-Way Sync will enable that any agenda item created from the platform will sync back to your Google Calendar. All existing events and events that are created from Google Calendar will be shown as 'Busy.'



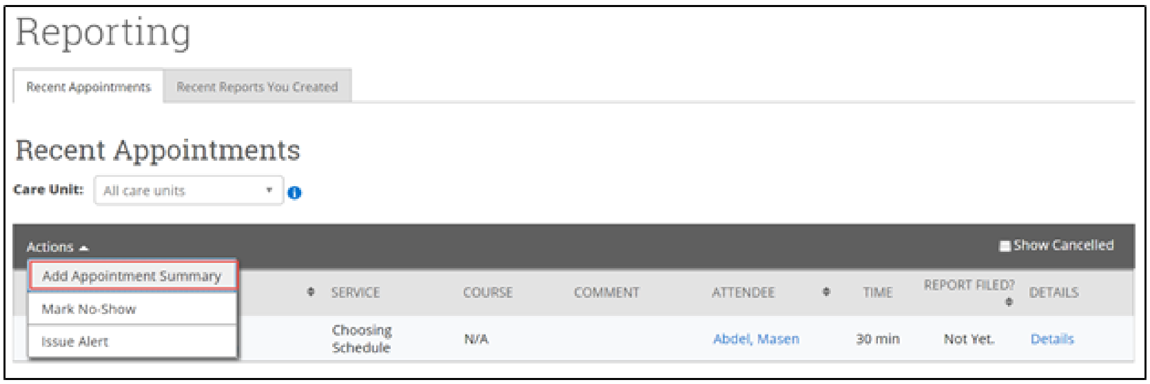
Appendix C: Add Advising Summary Reports

Documenting a Student Interaction

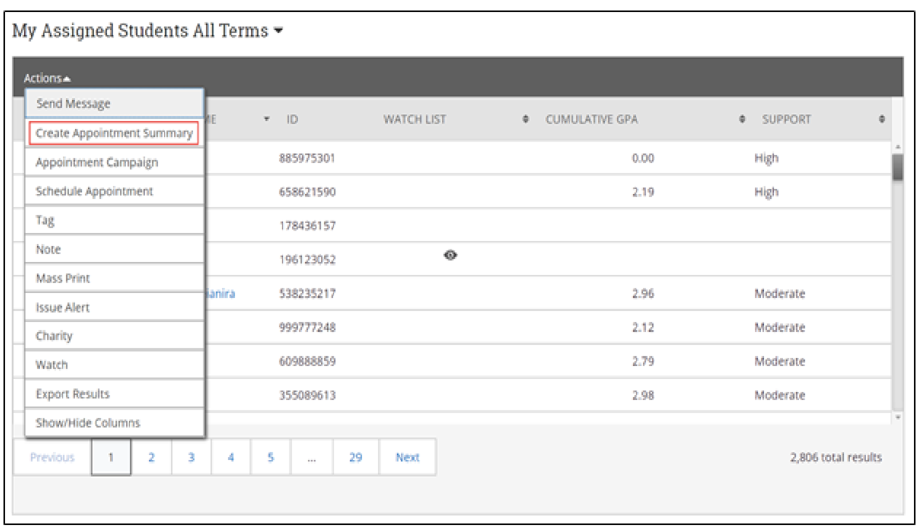
Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

For Scheduled Appointments: There are several different ways to create an Appointment Summary Report for scheduled appointments. **Add Appointment Summary** is an option in the Actions drop-down menu throughout the platform. The easiest way to access your appointments is from your Staff Home page. Under the **Students** tab on Staff Home, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Add Appointment Summary** from the Actions drop-down menu. You can also access this section from the **Upcoming Appointments** tab of Staff Home.

Note: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.



For Drop-in Appointments: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report for a walk-in appointment is from Staff Home or a student profile. Under the Students tab of Staff Home, find the specific student in your My Assigned Students section, or click the drop-down to find the student from one of your saved lists. From this section, you can click on a student and select Create Appointment Summary from the Actions drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.



For more detailed guidance, check out the Help Center!

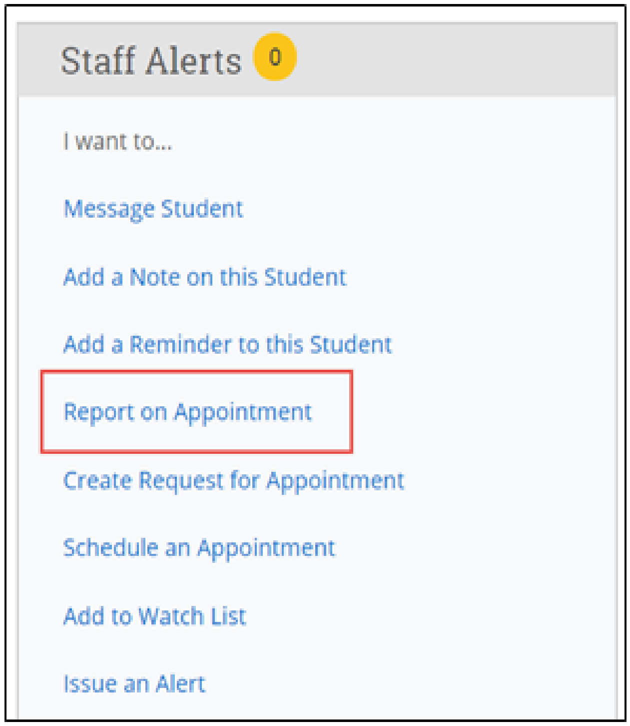
Appendix C: Add Ad Hoc Appointment Summary Reports

Documenting an Advising Interaction

You can also create an ad hoc Appointment Summary Report from a student's profile page. Navigate to that specific student's profile and click **Report on Appointment** from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.

Reminder: When creating an ad-hoc Appointment Summary Report to track drop-in appointments, the Navigate platform will create the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, regardless of whether they were scheduled or walk-ins. If you sync your professional calendar to the Navigate platform, this appointment created in the past will also sync to that calendar.

For No-Show Appointments: The primary way to mark a student as a no-show for a scheduled appointment is from Staff Home. On the **Students** tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Mark No-Show** from the Actions drop down. You can also access this section from the **Upcoming Appointments** tab of your homepage. Marking a student as a no-show still adds a Summary Report to the appointment. The only difference is that the box next to the student's name called **Attended** will not be checked. See the screenshot below.



Important Note: Any information you enter into Navigate pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).

For more detailed guidance, check out the Help Center!

Appendix D: Mass Email and Text a Group of Students

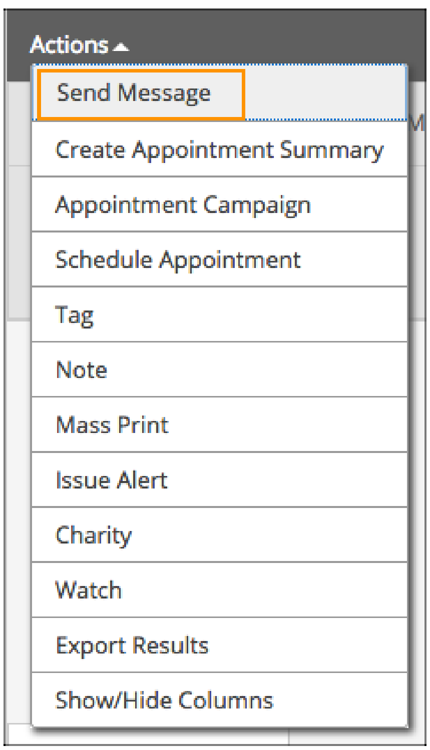
Communicating with Students

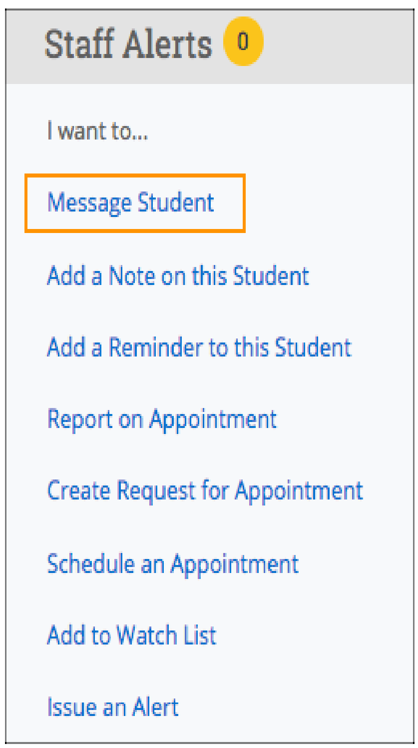
Navigate provides both **email** and **text messaging** for faculty and staff to communicate with students, either individually or en masse. Communicating with students through the platform creates records of those communication which can be accessible by other staff or faculty on your campus. In addition, it allows for a quick and easy way to communicate with more than one student at once.

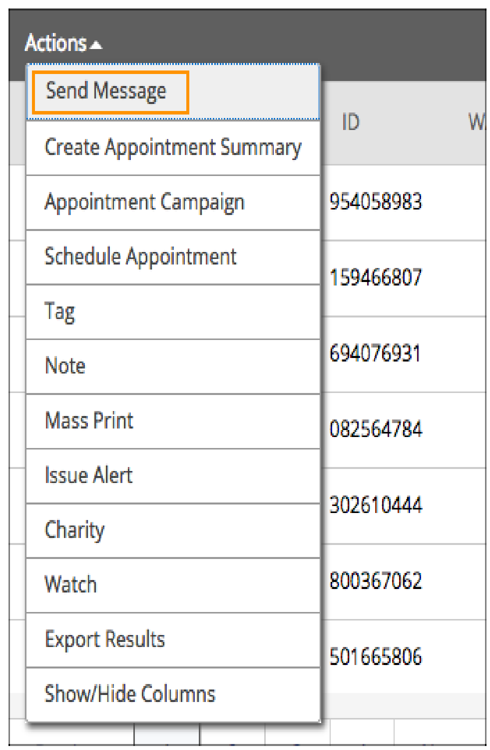
Any faculty or staff member will only be able to view communications in which they have the proper permissions. Permissions allow users to either view only their own communications with students, or to view all communications with students. If you are unsure who can view your communications, contact your Application Administrator.

How do I send the emails or texts?
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.

- Send a message from the Staff home page (fig. 1)
- Send a message from the Student home page (fig. 2)
- Send a message from the Advanced Search (fig. 3)







Important Note: If you do not see the option to Email or Text students, then your role does not have the proper permission for this action, or your institution decided not to allow texting. Please contact your Application Administrator with questions.

For more detailed guidance, check out the Help Center!

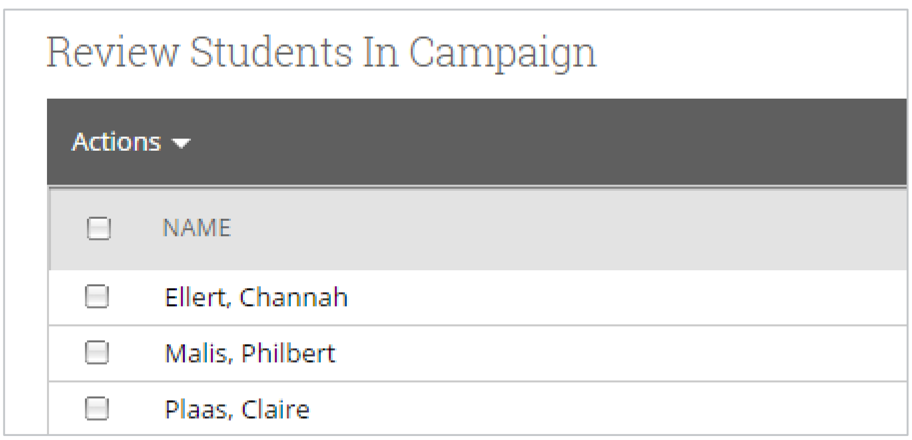
Appendix E: Creating an Appointment Campaign

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:

- Name your campaign (Students will not see the name of the campaign)
- Select "Advising" as the Care Unit (or the applicable Care Unit for your campaign)
- 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).
- 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".
- 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".
- Appointment Limit- how many appointments can the student schedule for the campaign? (default is 1)
- Appointment Length- how long do you want the appointment to last?
- 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".



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:

- Create a Subject Line for your email
- 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.

For more detailed guidance, check out the Help Center!