Student Success Collaborative
Navigate

Quick Start Guide for Navigate

GETTING STARTED

1. Log in to Navigate using your SSO credentials!

Training: https://fayettevillestate.campus-training3.eab.com/ - available for practice
PRODUCTION SITE URL: https://fayettevillestate.campus.eab.com/ - Use as of 1/19

Once logged in, click into the Help Center (instructions on page 2) to make all links below accessible:

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. Cl*ick below* for detailed instructions. You will need to disconnect your calendar from GradesFirst, before syncing with Navigate.

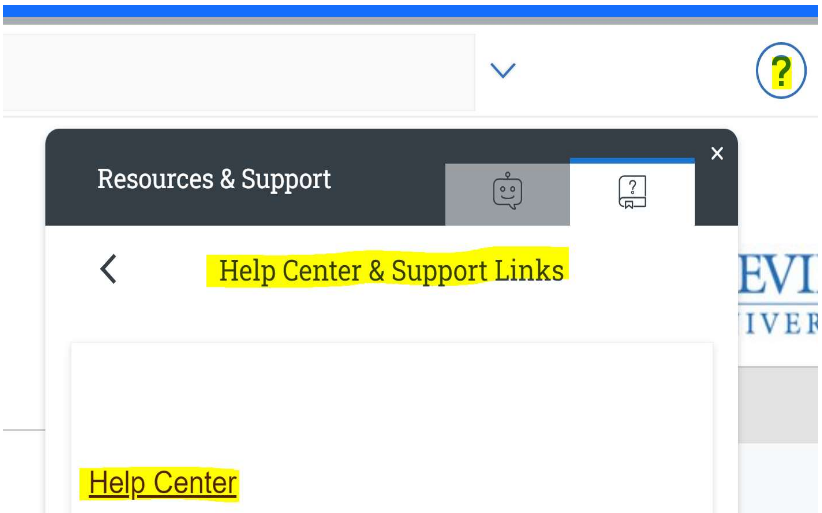
KEY PLATFORM FEATURES

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

- **Orient to the Actions and views on Staff Home**
- **Click the magnifying glass with a plus sign to Save a Search** – Advanced Search queries the nightly Banner data. Type in Student Information bucket – Categories if you don't find a filter in other buckets to see if your preferred Banner attribute has been added. If not, email the support address noted on p. 2
- **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
- **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 C*
- **Add Appointment Summary Reports or Notes–** 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 D*
- **Create a Progress Report or Issue an Alert** to initiate Always Alert interventions. Academic Coaches will intervene based on level of interventions – see *Appendix E*
- **Create an Appointment Campaign -** Use this to invite students set up an appointment during times you have designated – see *Appendix F*

Need Help? Access EAB's Help Center

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



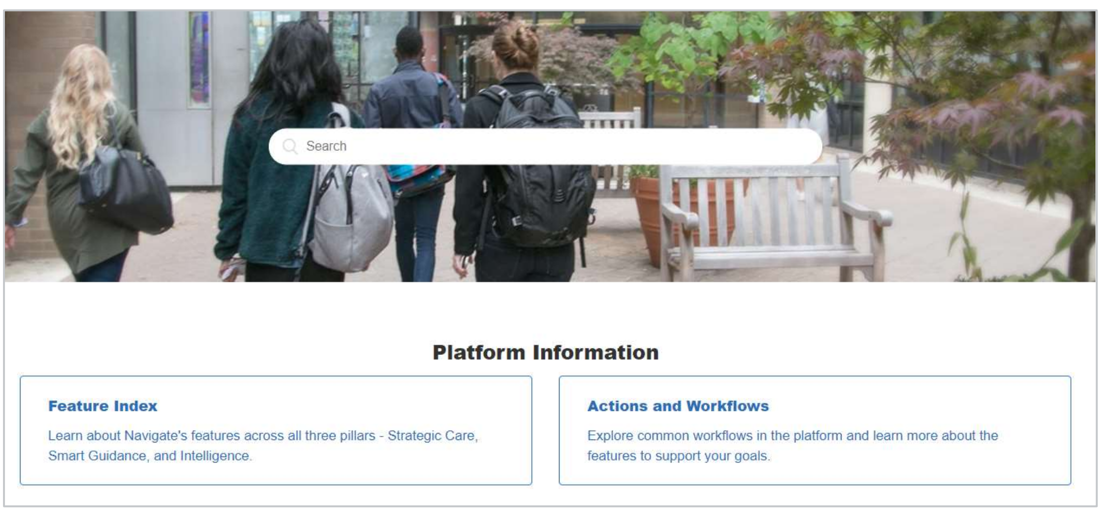
Accessing the Help Center -

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. View the Help Center Overview Video to get the most from its resources!



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 bronconavigate@uncfsu.edu for support!

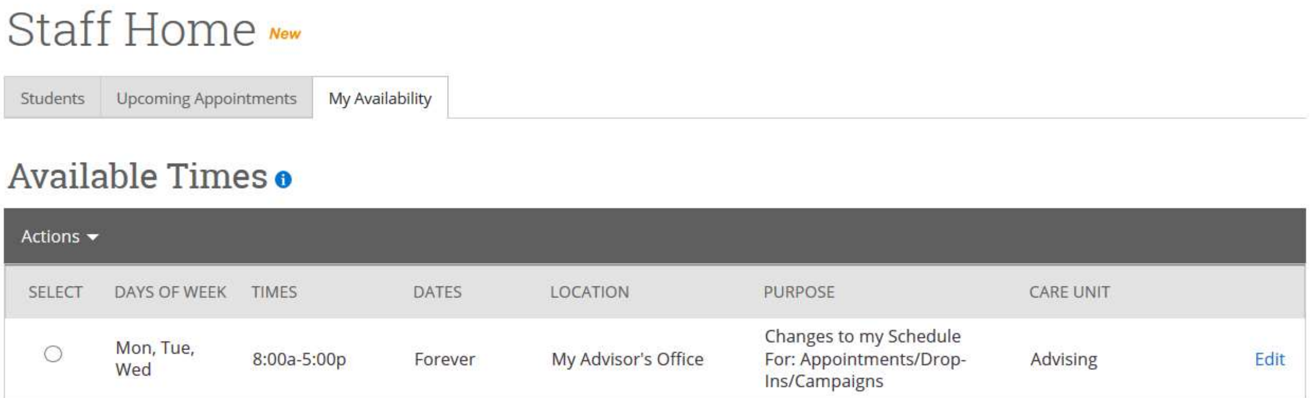
Expectations: What should you be using Navigate for?

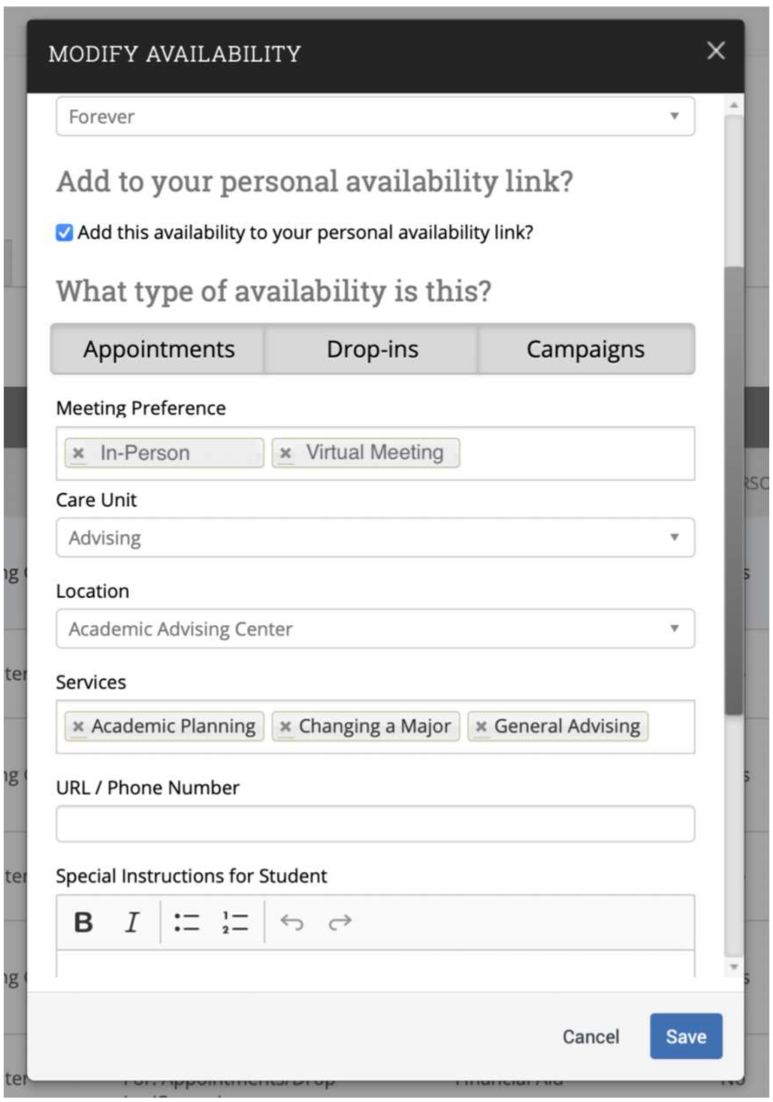
Workflow	**Advisor** ***Academic Advisors (Advising Center), Success Coaches***	**Key Staff Partner Areas** ***E.g., Student Care, Pastoral Care, Learning Center, Career teams***	**Faculty Advisors & Admins**	**Faculty**
Review student profile before appointment	- Student Overview, *Categories*, Success Progress, History, Class Info, and Path tabs	- Student Overview, *Categories*, History, Class Info, and Path tabs	- Student Overview, *Categories*, History, Class Info, and Path tabs	- Student Overview, History, Class Info, and Path 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 (e.g., Learning Center, Pastoral Care forms) - Campaigns: Upcoming Appointments tab	- Add advising summary report or notes after appointments	- Phase II
Contact students through navigate	- Email and text students (see communication policy examples) - Create Searches and Student Lists to contact students from Advanced Search	- Email and text students (see communication policy examples) - Create Searches and Student Lists to contact students from Advanced Search	- Email and text students (see communication policy examples) - *Create Searches and Student Lists to contact students from Advanced Search*	- Email and text students enrolled in your courses (see communication policy examples)
Schedule appointments	- Set up availability for Appointments and Drop-Ins (Advising Care Unit) - Appointment Campaign guidelines (Phase II)	• Email and text students (see communication policy examples) • Create Searches and Student Lists to contact students from Advanced Search	- Phase II	- Phase II
Issue alerts	- Issue an Alert on students for referrals - Manage assigned cases	- Issue an Alert on students for referrals - Manage assigned cases	- Issue an Alert on students for referrals - Manage assigned cases	- Issue an Alert on students for referrals - Progress Reports

Appendix A: Setting Up Your Availability

Availability

As a new user, the first thing you need to do is set up availabilityso 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 Meeting Preference, select the applicable meeting modality.

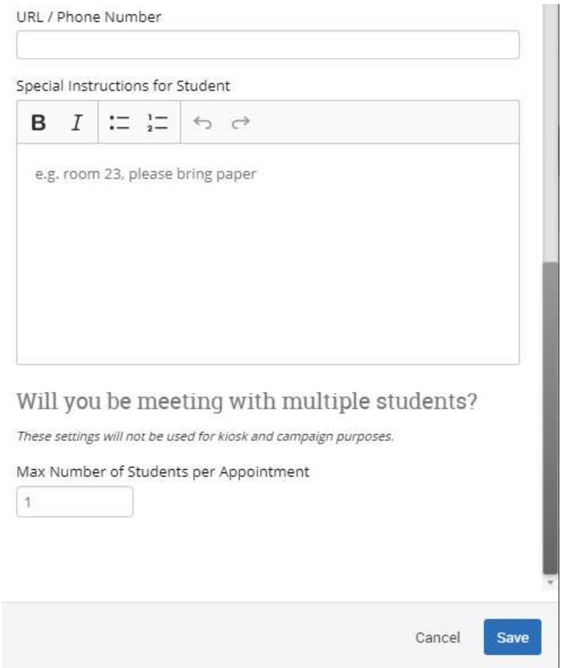
Step 7: For Care Unit, select Advising.

Step 8: Choose the location where you will be available.

Step 9: Select services you can provide students during this availability. You must choose at least one service but can pick more.

Steps 10-14 continued on next page…

Appendix A: Setting Up Your Availability



Step 10: In the *URL / Phone Number* field, add your meeting link for your appointments.

Step 11: 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 12: 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 13: Click the Save button.

Step 14: 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.

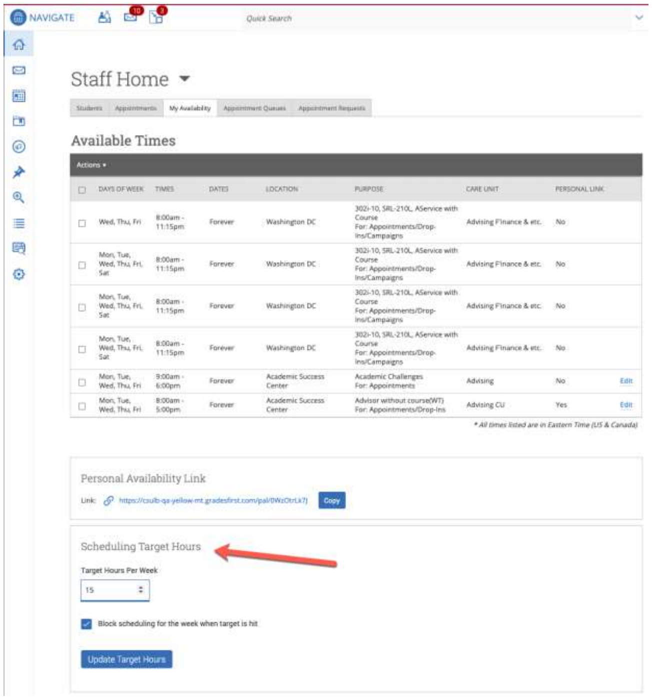
Delete Time- to delete your time, simply select the time and click the Delete Time button.

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.

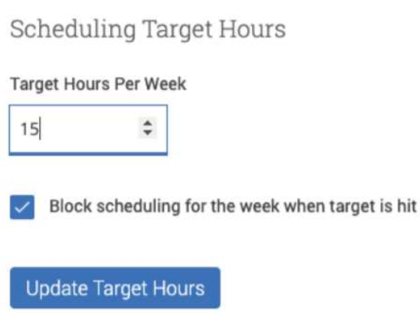
For more detailed guidance, check out the Help Center!

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.

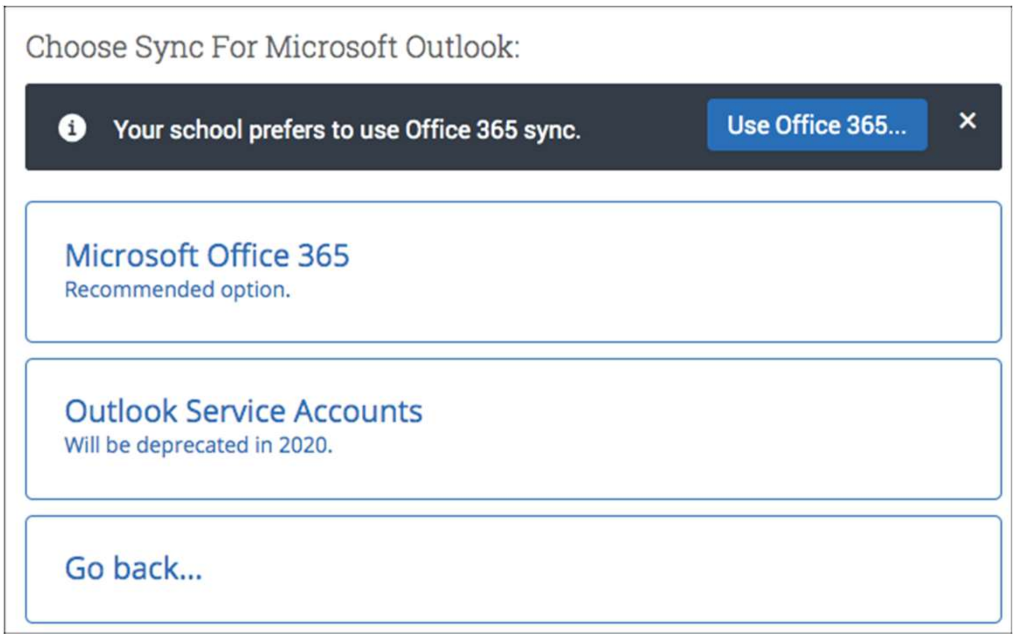


Appendix B: Sync Your Outlook Calendar

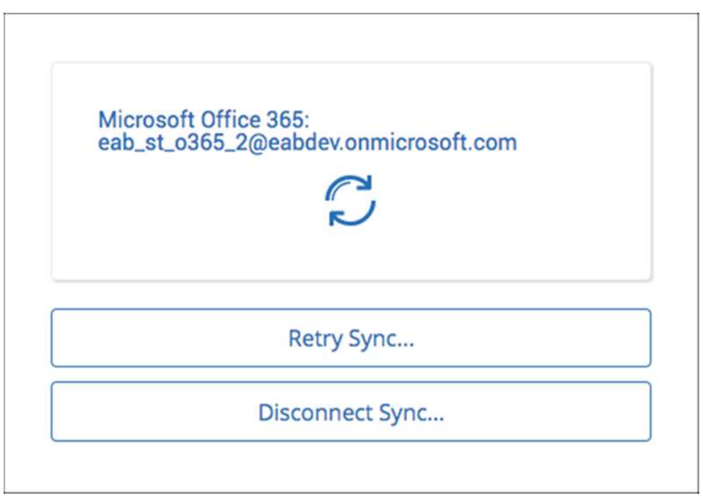
Integrating Your Calendar

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.

1. Toggle to the calendar page within Navigate using the calendar icon on the left side toolbar.
2. Select Settings and Sync on the top right side of the page
3. Click Setup Sync. You will see a "Your school prefers to use Office 365 sync" banner on Calendar with a "Use Office 365…" button to begin the setup.



4. Upon clicking the button, you will be routed to login.microsoftonline.com. If the you are not already signed into Office 365, you will be prompted to sign in.
5. After signing in, Office 365 will ask you to grant permission for the application to access your calendar. Pressing "Accept" will authorize and begin the syncing.



The browser will return to the Calendar Integrations page. The "Exchange Integration" tab will no longer appear. The "Office365 Integration" tab will now show the timestamp for the last successful sync (or any applicable error message) and will include options for you to Retry or Disconnect the sync as needed.

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

For more detailed guidance, check out the Help Center!

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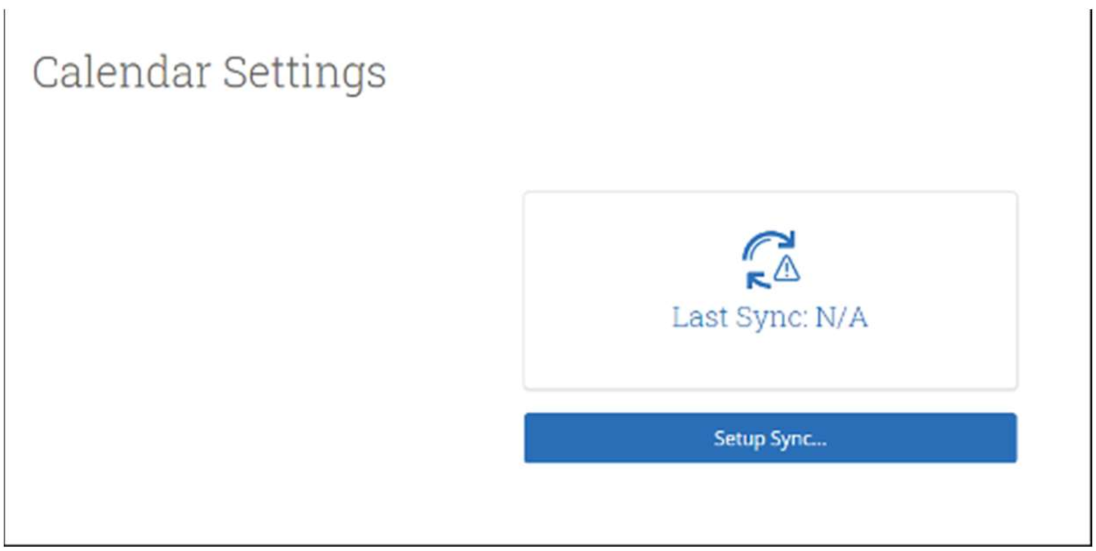
The availability you set up within Navigate dictates students’ ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate to your personal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

Select the calendar icon in the left navigation bar. Once on the My Calendar page, select the **Settings and Sync** button.

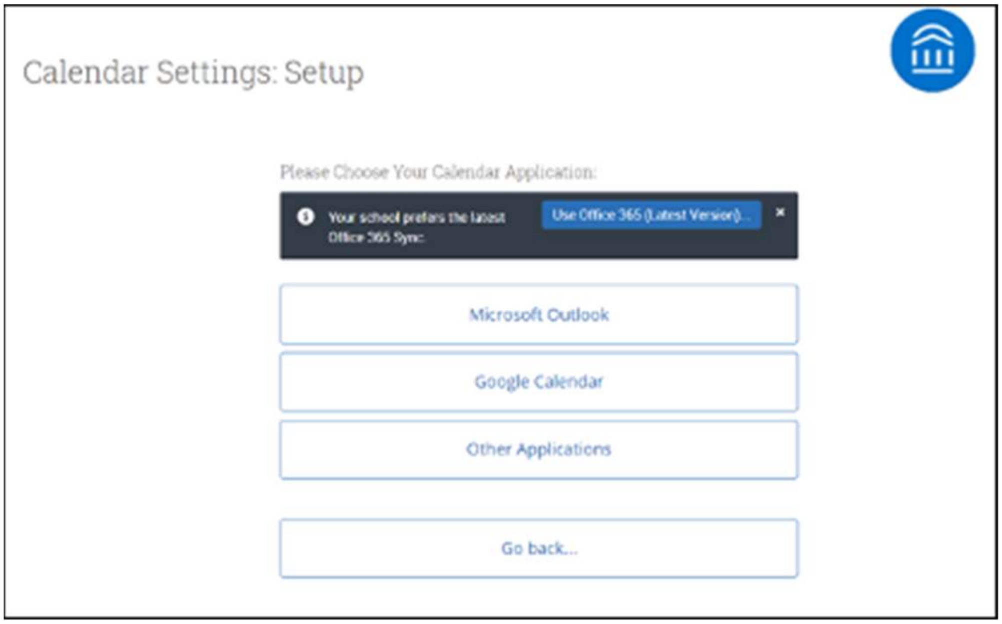
On the Calendar Settings page, select **Setup Sync…**



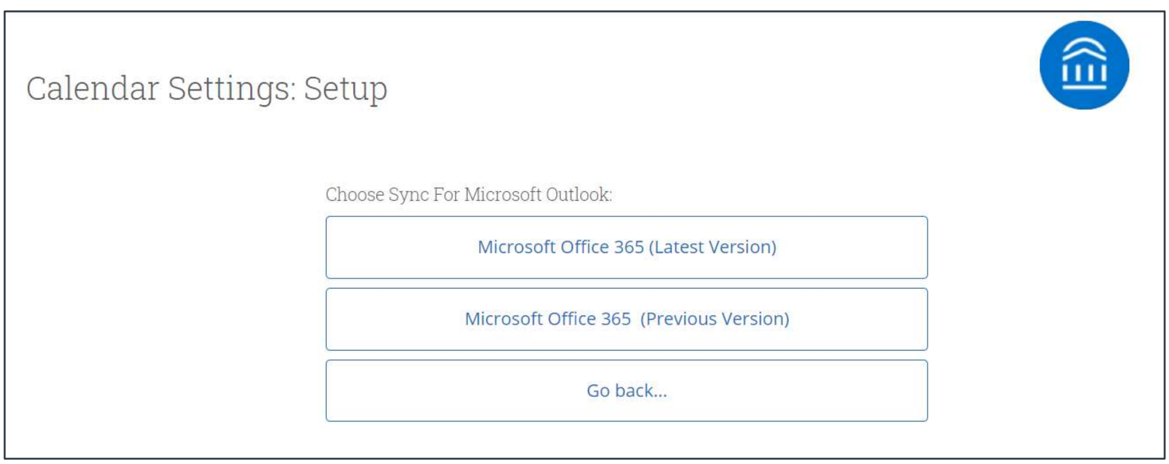
Appendix B: Sync Your Outlook Calendar

Integrating Your Calendar

If you see the following screen, click the button that says **Use Office365 (Latest Version)** at the top of the list of options, as in figure 3.



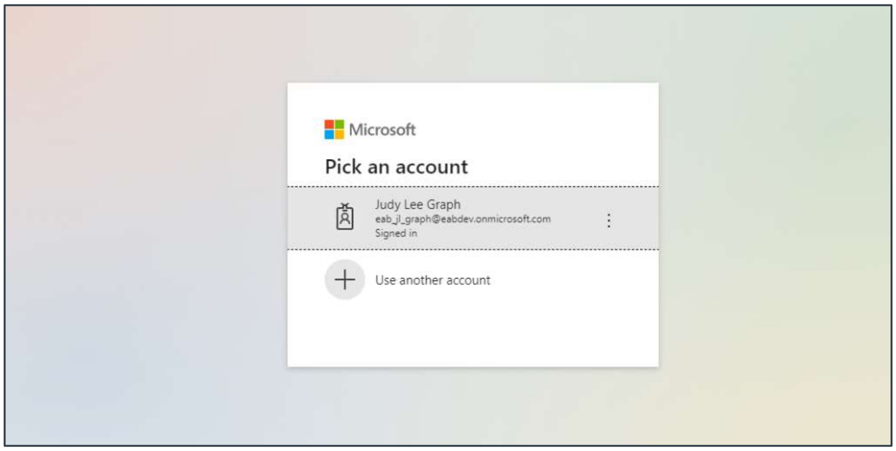
If you click **Microsoft Outlook** instead of the **Use Office365 (Latest Version)** button, you choose your Microsoft Outlook sync. Select **Microsoft Office 365 (Latest Version)** from the options.



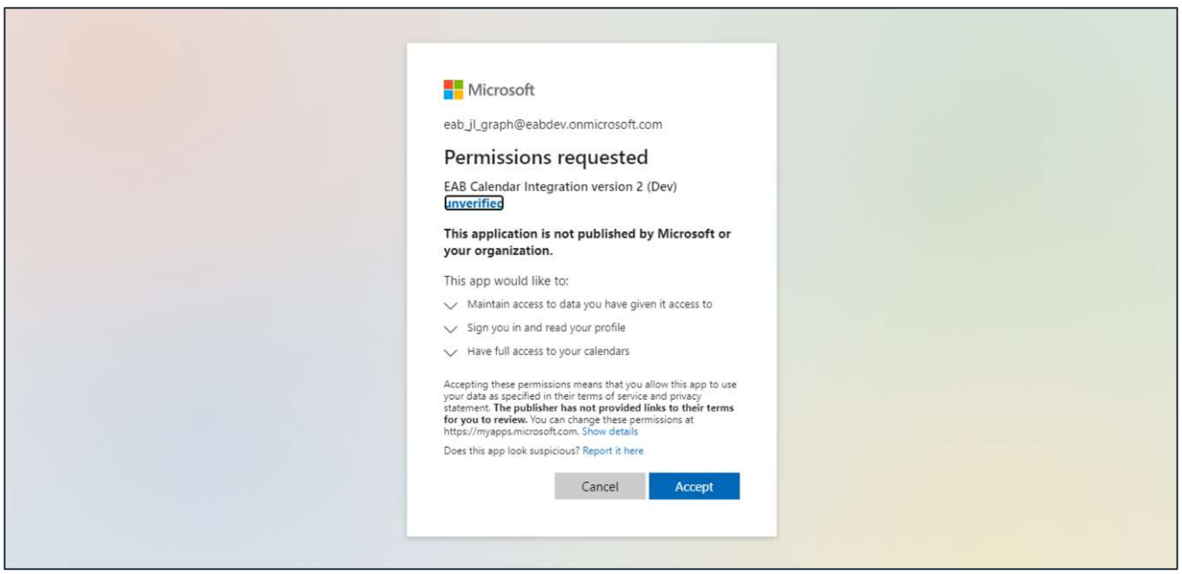
Regardless of which method you choose, the Microsoft login and authorization page opens. The page tells you to pick an account. Choose your professional account.

Appendix B: Sync Your Outlook Calendar

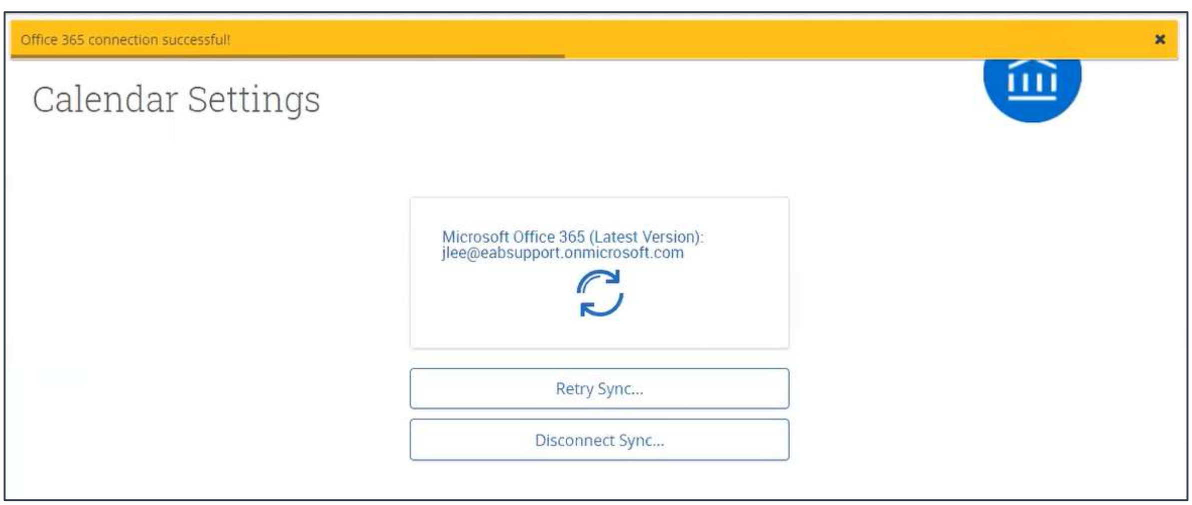
Integrating Your Calendar



If you log in successfully, you see a page requesting permissions.



Select **Accept**. The page redirects to the Navigate Calendar Settings page, with a success message and information about the sync on display.



Appendix C: Mass Email and Text a Group of Students

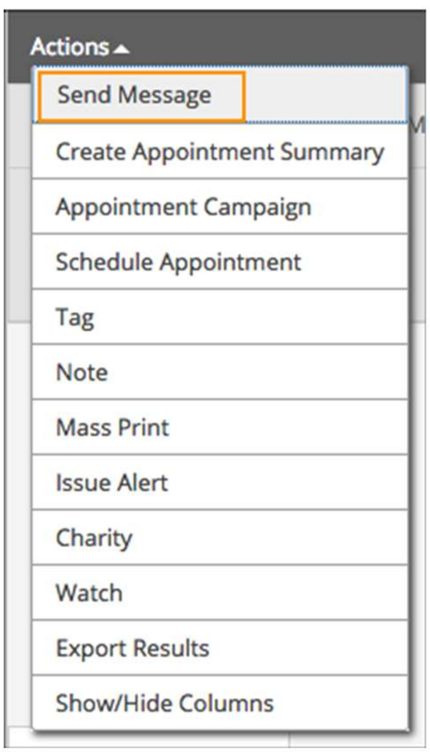
Communicating with Students

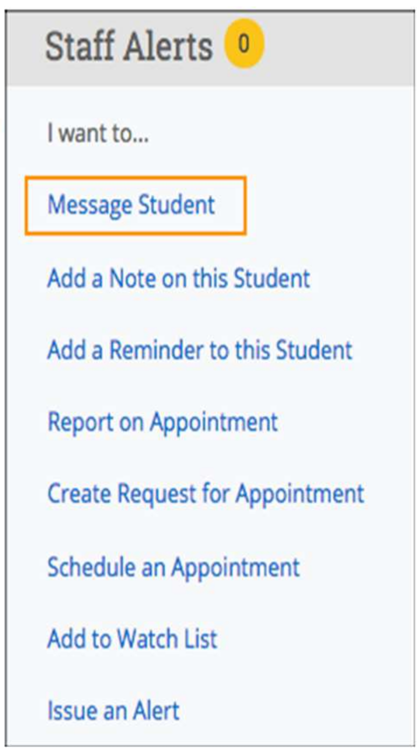
Navigate provides both **email** and **text messaging** for faculty and staff to communicate with students, either individually or en masse. Communicating with students through the platform creates records of those communication which can be accessible by other staff or faculty on your campus. In addition,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

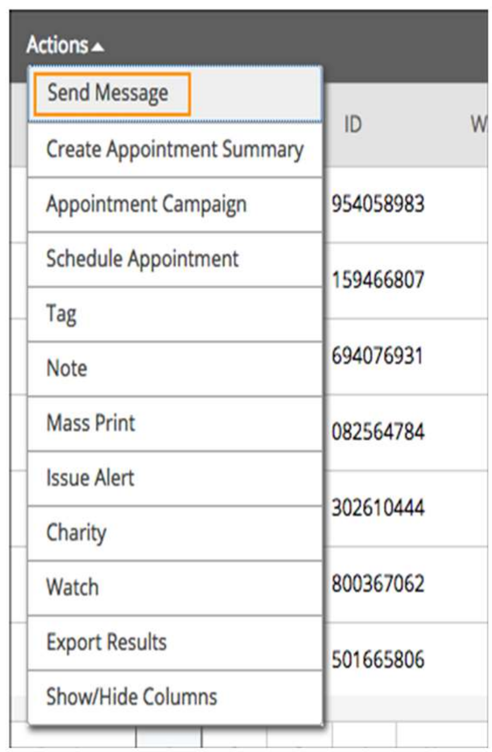
Any faculty or staff member will only be able to view communications in which they have the proper permissions. Permissions allow users to either view only their own communications with students, or to view all communications with students. If you are unsure who can view your communications, contact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

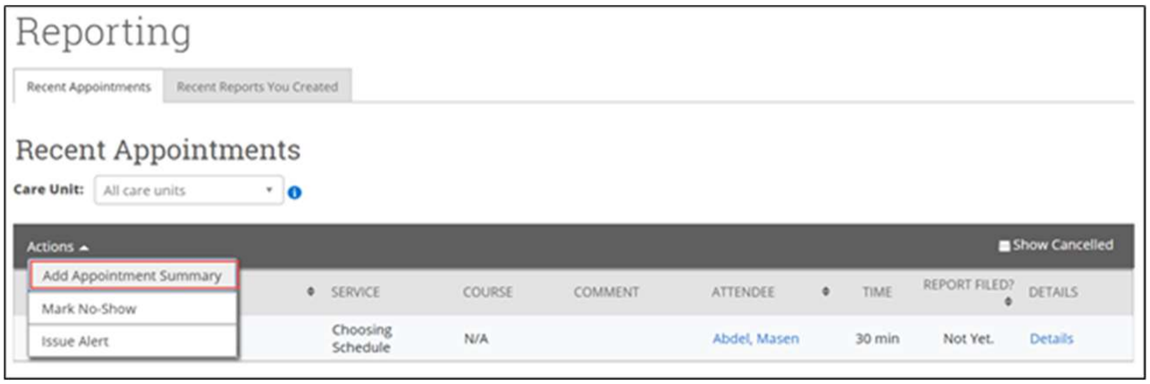
Appendix D: Add Appointment Summary Reports

Documenting a Student Interaction

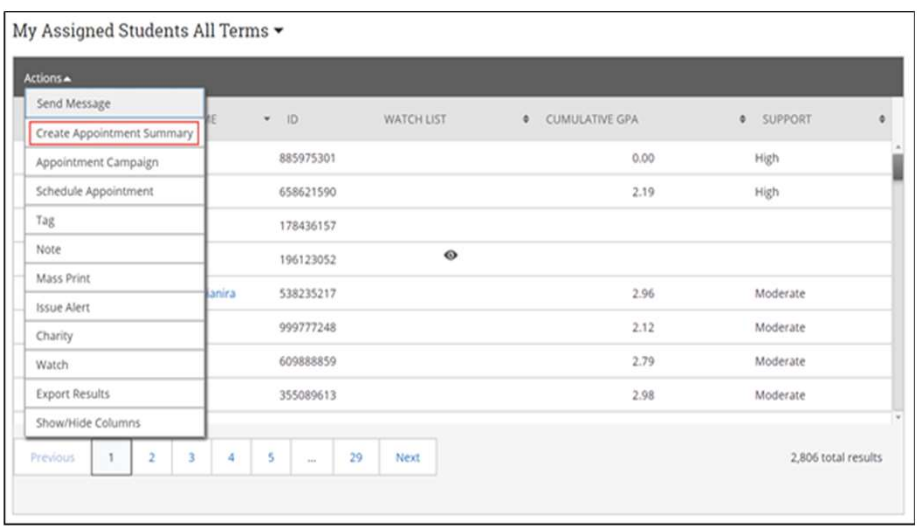
Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

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!

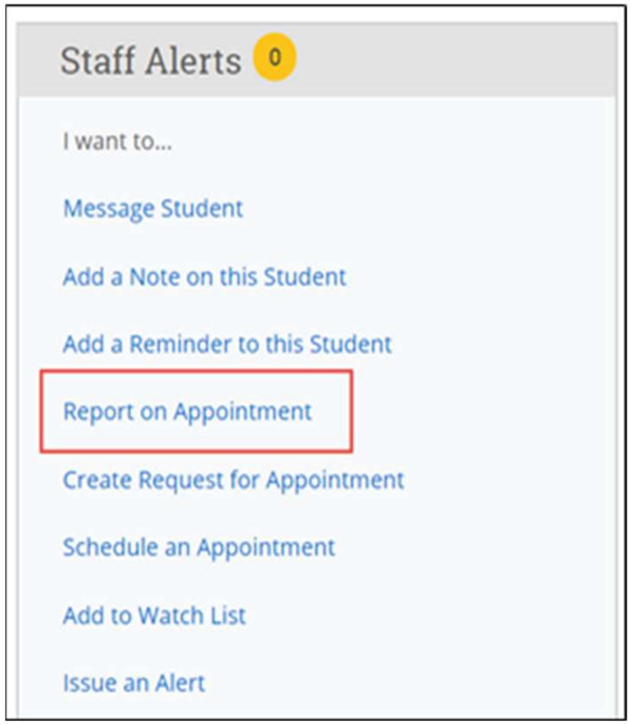
Appendix D: Add Ad Hoc Appointment Summary Reports

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 E: Create a Progress Report or Issue an Alert

Submitting a Progress Report

Navigate's [Progress Report](#)feature is used by faculty to share critical academic information on students enrolled in their courses. Use the instructions below to submit a Progress Report and mobilize support for a student.

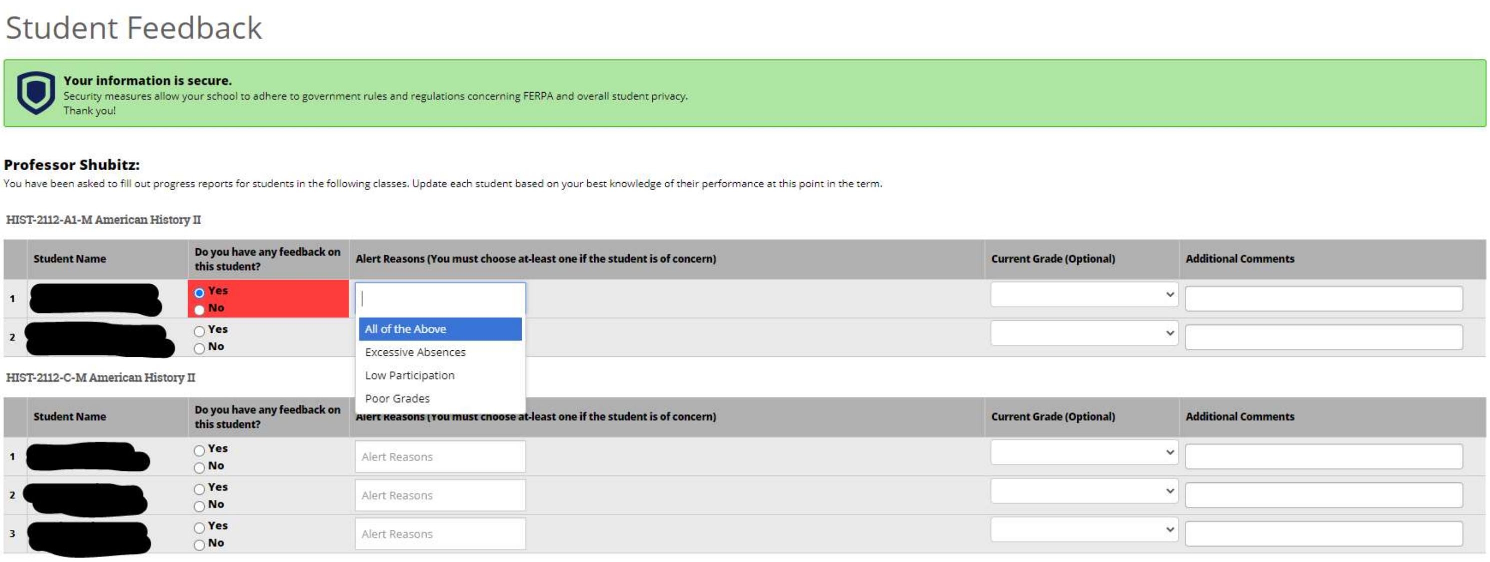
Step 1: Access the Progress Reports either directly from the request email or by logging in to the Navigate platform and toggling to the Professor home page.

Step 2: Click "Fill out Progress Report" from email or home page.

Step 3: In the feedback screen, you will see a list of course sections and students that feedback is being requested for. This may or may not include all the students enrolled in your courses this semester. Begin filling out feedback according to the instructions provided in the Progress Report request email.

Step 4: If you have feedback about a student, select "Yes" and choose an "Alert Reason" that indicates why you are submitting feedback on this student. You may choose more than one alert reason. Please fill out the remaining columns, including the comments section with additional detail that will help an advisor follow up with this student.

Step 5: When submitting your Progress Reports, you have the option to submit only the students you have filled out feedback for or to submit all students. If you choose to submit all students, the students who you have not filled out feedback for will be marked as "I do not have feedback about this student."



TIP: Use the glossary of Alert Reasons on the next page to understand what follow up action will be associated with each Alert Reason.

For more detailed guidance, check out the [Help Center](#)!

Appendix E: Create a Progress Report or Issue an Alert

Submitting an Ad-Hoc Alert

Navigate's ad hoc alerts are used by faculty and staff to share critical information and to create referrals for student between support offices. Use the instructions below to submit an early alert and mobilize support for a student.

Step 1: Click the "Issue an Alert" link in the upper right-hand corner of your home page.

Step 2: Search for the student for whom you'd like to issue an alert (using name or ID).

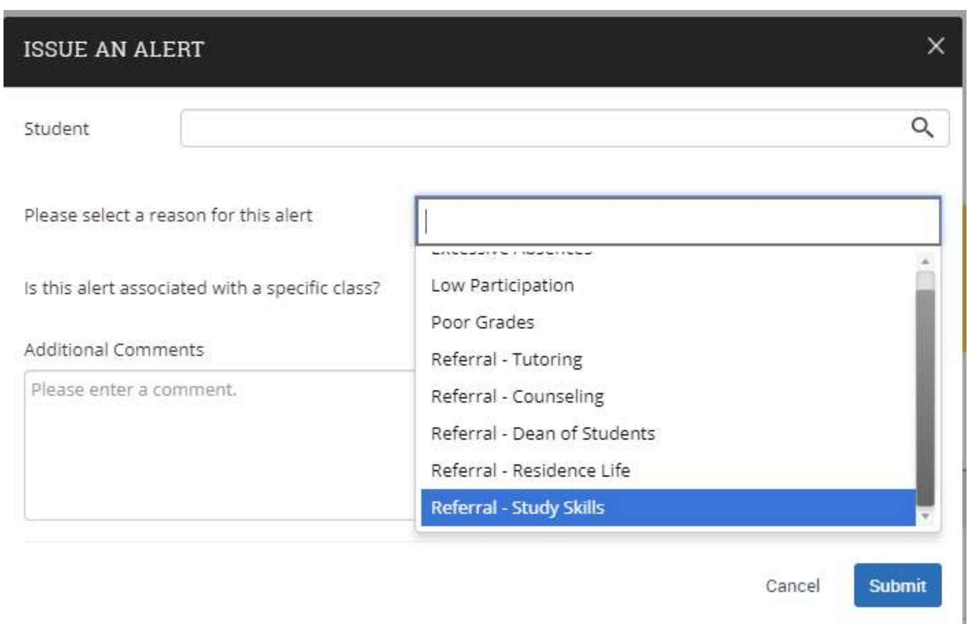
Step 3: Select the reason(s) you believe the student needs assistance. The reason(s) you choose will connect the student with the appropriate office. See more details on the specific alert reasons below.

Step 4: If the alert is associated with a particular class, fill out that field.

Step 5: Lastly, please provide any relevant context around your reason for submitting the alert in the comments section. Comments will help the team reviewing alerts to connect the student with the right resources in a timely fashion.

Step 6: Issuing an alert may open a case. You will receive an email notification when the case has been resolved.

TIP: Use the glossary of Alert Reasons on the next page to understand what follow up action will be associated with each Alert Reason.



For more detailed guidance, check out the Help Center!

Appendix E: Create a Progress Report or Issue an Alert

Alert Reasons in Progress Reports and Ad-Hoc Alerts

Navigate's ad hoc alerts are used by faculty and staff to share critical information and to create referrals for student between support offices. Use the instructions below to submit an early alert and mobilize support for a student.

Alert Reason	Description	Intervention
Attendance Concern (or not logging in online)	Alert prior to the Census date and FN deadline; afterward triggered by three absences	1) Review course expectations for attendance and/or any course attendance policies. 2) Discuss importance of attendance to successful performance in the class 3) Add/update comments on the alert.
Low Tests, Quizzes and Assignments	Student has low grades in course and that there are resources available to assist	1) Discuss level of performance needed to reach passing grade 2) Refer to campus resources if appropriate 3) Add/update comments on the alert.
Missing Assignments	Student has missing assignments in course and that there are resources available to assist	1) Review course expectations/study strategies 2) Review due dates 3) Refer to campus resources if appropriate; offer to assist in scheduling appointments/making contacts. 4) Add/update comments on the alert.
Student Should Seek Tutoring-Writing Center	Poor performance on assignments linked to reading/writing/ communication skills; poor grammar skills in Discussion Board and/or Essay answers; answers are superficial; repeat the question; do not demonstrate learning; using internet copy/paste answers	1) contact student about what they think are their challenges, 2) provide students with video and paper-based content guides, if available, 3) provide tutor contact information, 4) reinforce the path to learning (reading comprehension and time on task), 5) instruct student to contact professor, 6) follow up 1 and 2 weeks after tutoring
Student Should Seek Tutoring-Math Center	Poor performance on assignments in math; do not demonstrate learning	Same as above
Student Should Seek Tutoring-Other Courses	Poor performance in courses, make student aware of face-to-face and virtual tutoring resources	Same as above
Student Needs Support with Study /Time Management/Organizational Skills	Poor performance on assignments; poor notetaking; tardiness to class; needs support with soft skills to increase class success; incomplete and late assignments	1) contact student about what they think are their challenges with reading comprehension and note taking, 2) provide students with video and paper-based skill guides, if available, 3) provide tutor contact information, 4) reinforce the path to learning (reading comprehension and time on task), 5) instruct student to contact professor for insight, onto the internet, 6) follow up 1 and 2 weeks after tutoring

Appendix E: Create a Progress Report or Issue an Alert

Alert Reasons in Progress Reports and Ad-Hoc Alerts

Alert Reason	Description	Intervention
Academic Dishonesty Concerns	Professor notices us of the work of others in Discussion Boards, Exams, Papers	1) review student code of conduct, 2) review strategies for putting information into your own words (link to notetaking), 3)
At risk for leaving institution	Student plans to leave FSU by dropping out, stopping out, or transferring to another institution	1) Define reason for the alert in the comments 2) Reach out to student to provide assistance or referrals 3) Update comments and close case.
Kudos	Student is demonstrating an ability to address all parts of an assignment in a way that demonstrated learning and/or student is improving in the course	Optional: recognition to reinforce the comment with an email
Financial Aid Concern	Student has concerns about their financial aid package or needs to sign up for financial aid	1) Define reason for the alert in the comments 2) Reach out to student to provide assistance or referrals 3) Refer, if necessary, to Financial Aid. 3) Update comments and close case.
Food Insecurity	Student has expressed concerns about hunger and lack of food	1) Define reason for the alert in the comments 2) Reach out to student to provide assistance or referrals 3) Update comments and close case.

For more detailed guidance, check out the Help Center!

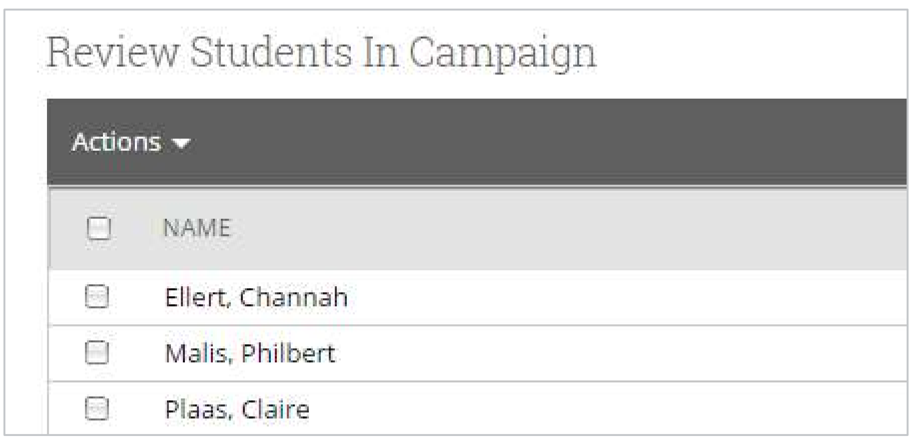
Appendix F: Creating an Appointment Campaign

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!