EAB

Student Success Collaborative
Navigate

Quick Start Guide for Navigate

GETTING STARTED

1. Log in to Navigate using your SSO credentials!

Production Link: https://sgsc.campus.eab.com/

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 (prod only)**– This initiates the two-way sync between Navigate and your 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 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 & Text 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.
- **Issue an Alert –** Use this to let campus entities know a student needs access to additional resources/services (academic concern, health/wellness concern)
- **Schedule an Appointment and Create an Appointment Campaign -** Use this to invite students set up an advising appointment during times you have designated –
  - From the 'Actions' menu on your list, select 'Appointment Campaign' – See Appendix C for detailed instructions on creating a campaign.

Expectations: What should you be using Navigate for?

Workflow	Professional Advisor	Faculty Advisor
Set up availability	- Set up availability for drop-in and appointments for duration of semester	- Set up availability for drop-in and appointments for duration of semester
Review student profile before appointment	- Review TABS before appointment to prepare XYZ	- Review TABS before appointment to prepare XYZ
Capture details about advising interactions	- Add advising summary report after each appointment	- Add advising summary report after each appointment
Contact students through Navigate	- Email or text students from home page - Identify students via advanced search and send mass communication about XYZ	- Email or text students from home page
Make Referrals Not available until Phase 2	- Refer students to other units - Manage your assigned cases	- Refer students to other units - Manage your assigned cases

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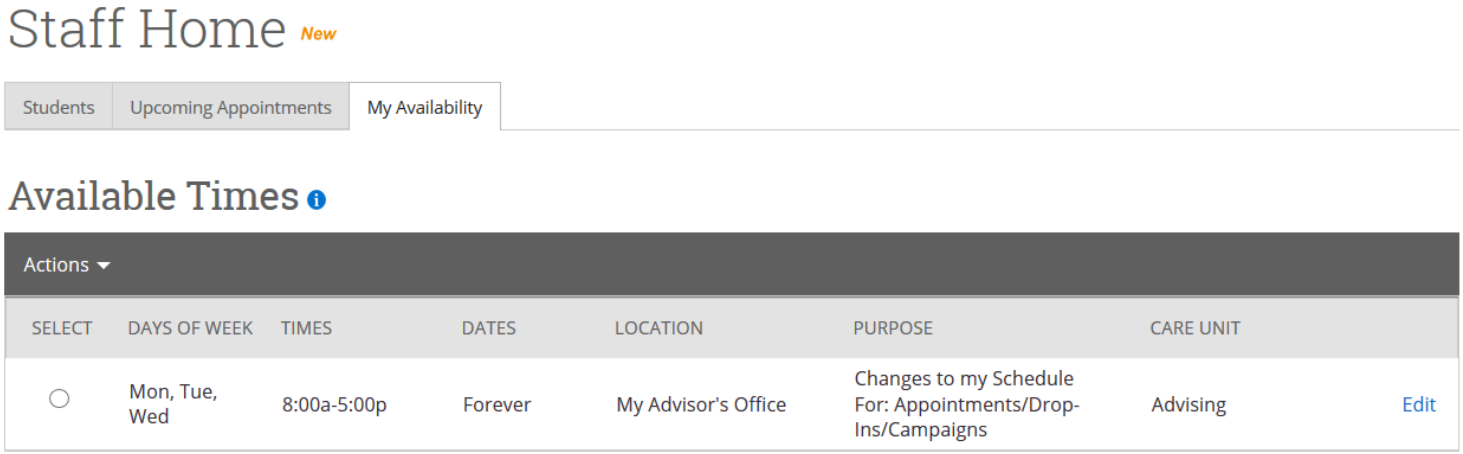
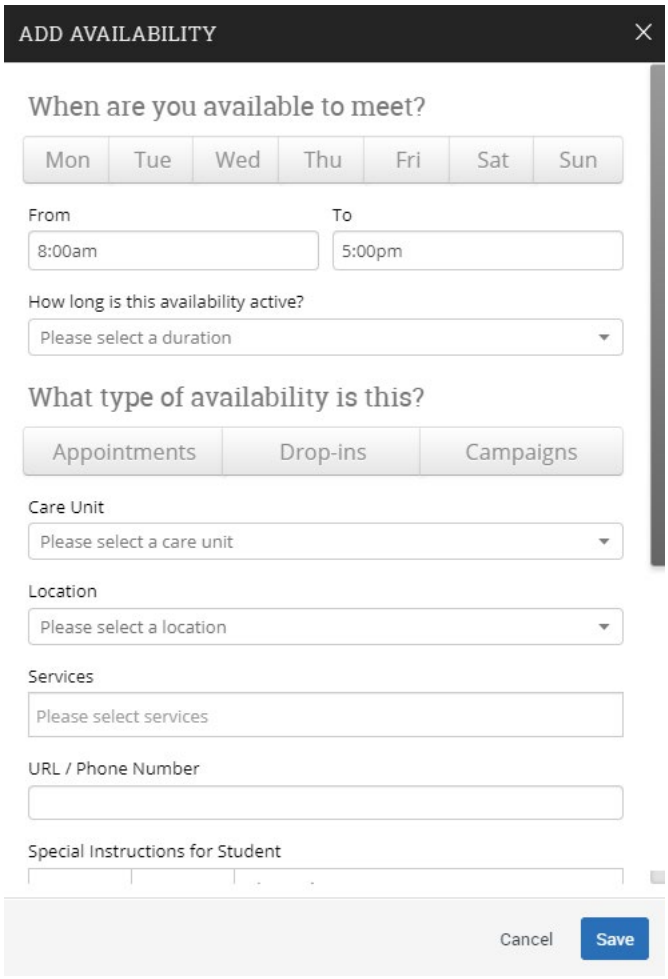
Appendix A: Setting Up Your Availability

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 university administrators.





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...

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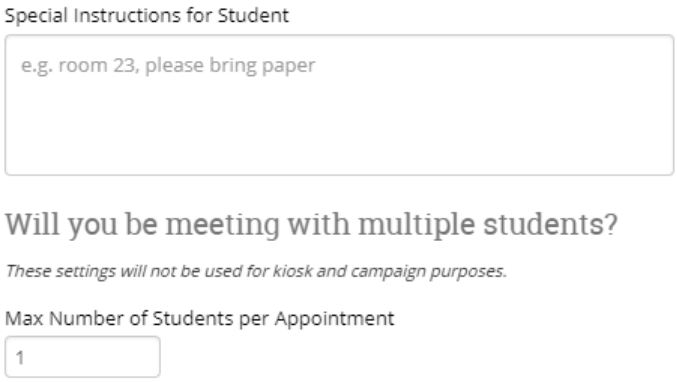
Appendix A: Setting Up Your Availability



Step 6: Use the Special Instructions box under "Add Availability" to include personalized information, such as your office room number and location.

Step 7: Click the Save button.

Step 8: 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.

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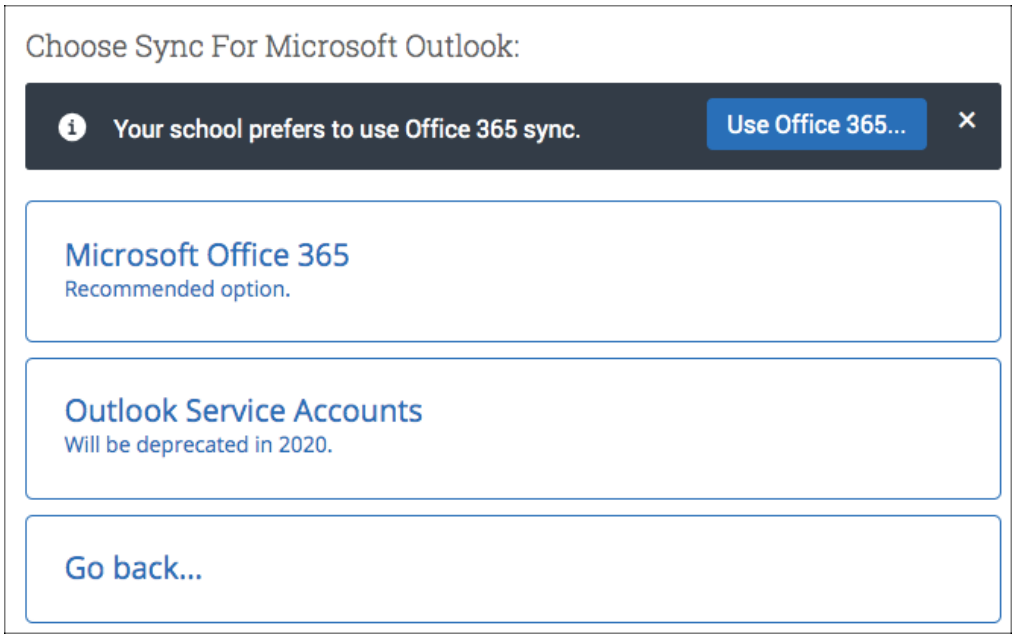
Appendix B: Sync Your Outlook Calendar

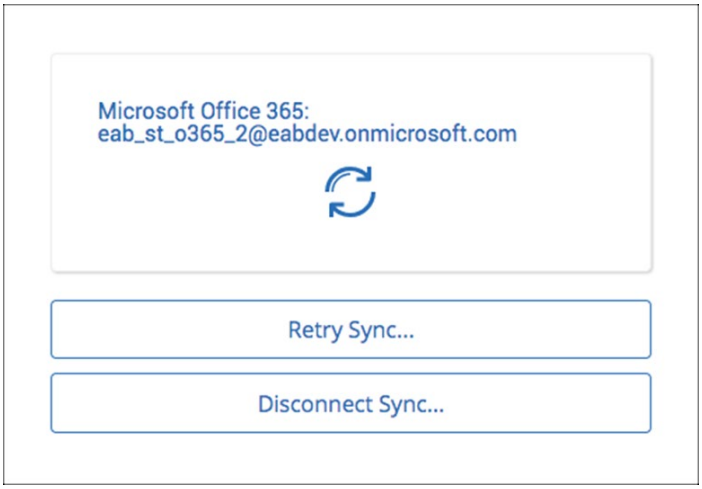
Integrating Your Calendar

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

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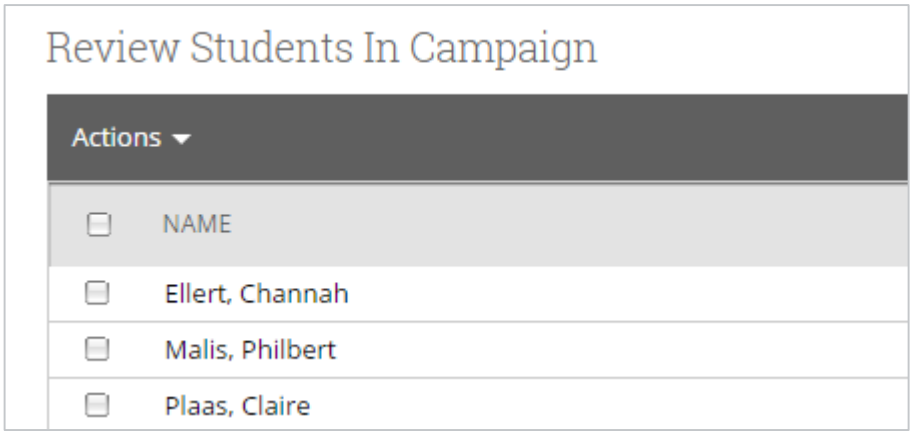
Appendix C: Creating an Appointment Campaign

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.

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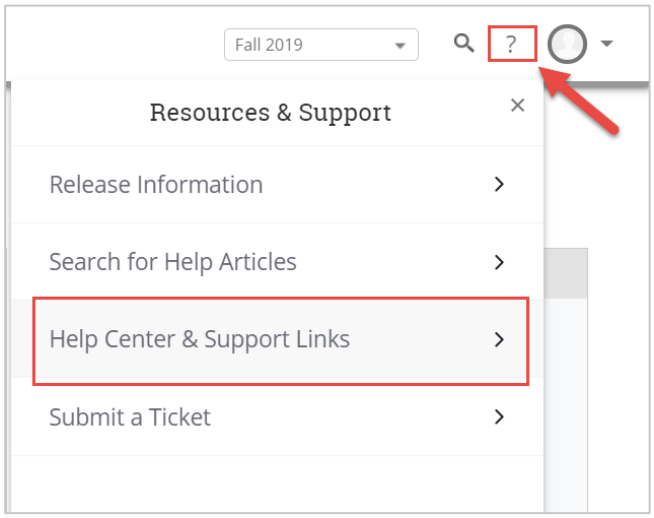
Need Help? Access EAB's Help Center

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



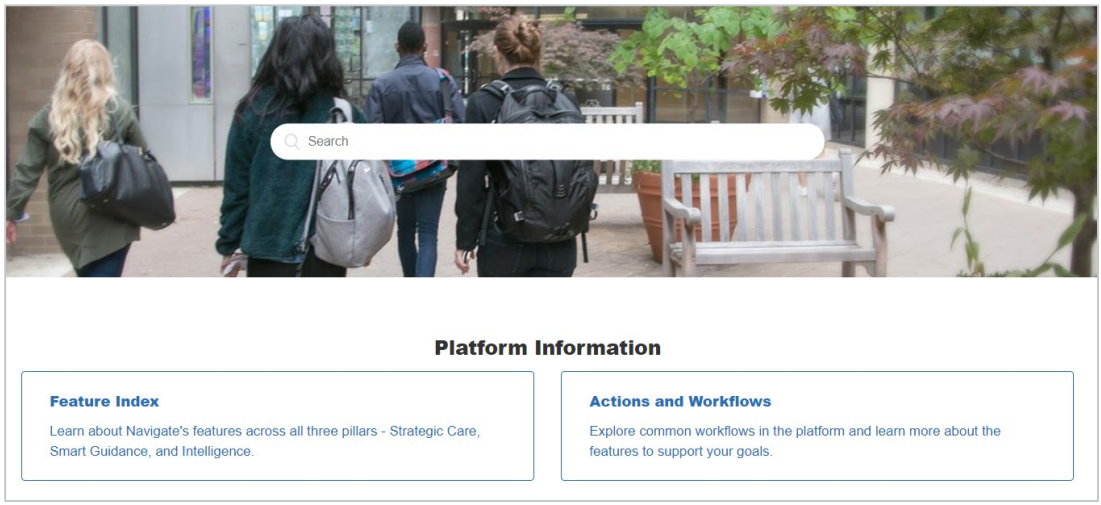
Accessing the Help Center -

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 Navigate@sgsc.edu for support!

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