



Quick Start Guide for Navigate

GETTING STARTED

1. **Log in to Navigate using your SSO credentials.** Once logged in, follow the steps included in this guide to learn how to use Navigate features and functionality.

There are links throughout this guide that will take you to additional information in the Navigate Help Center. Be sure you are logged in to your Navigate site and the Help Center before clicking the links. See instructions to log in to the Help Center on page 2.

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.

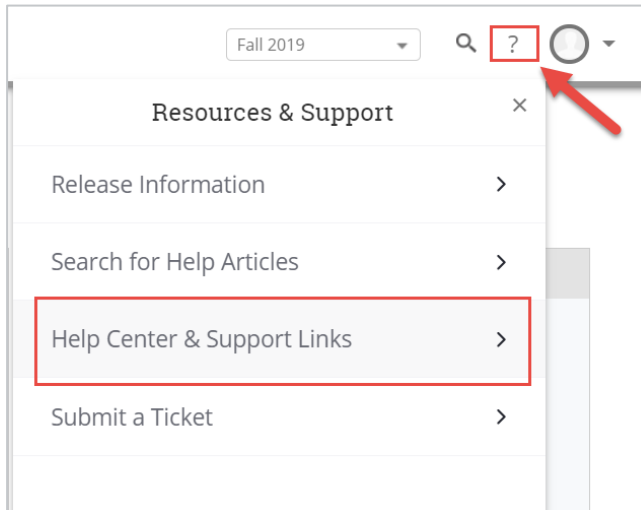
KEY PLATFORM FEATURES

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
 - **[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 Alert interventions. Staff members 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*
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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.



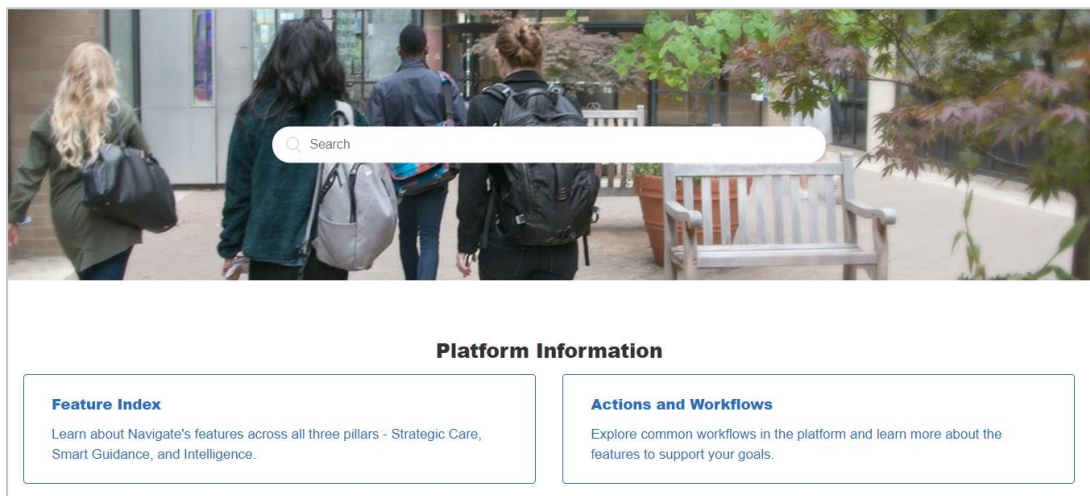
Accessing the Help Center -

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. 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!](#)

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.

Staff Home New

Students Upcoming Appointments My Availability

Available Times 0

Actions ▾						
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT
<input type="radio"/>	Mon, Tue, Wed	8:00a-5:00p	Forever	My Advisor's Office	Changes to my Schedule For: Appointments/Drop-Ins/Campaigns	Advising Edit

MODIFY AVAILABILITY

Forever

Add to your personal availability link?
☒ Add this availability to your personal availability link?

What type of availability is this?

Appointments Drop-ins Campaigns

Meeting Preference

☒ In-Person ☐ Virtual Meeting

Care Unit

Advising

Location

Academic Advising Center

Services

☒ Academic Planning ☒ Changing a Major ☒ General Advising

URL / Phone Number

Special Instructions for Student

B I

:

1=

2=

↶

↷

Cancel

Save

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.

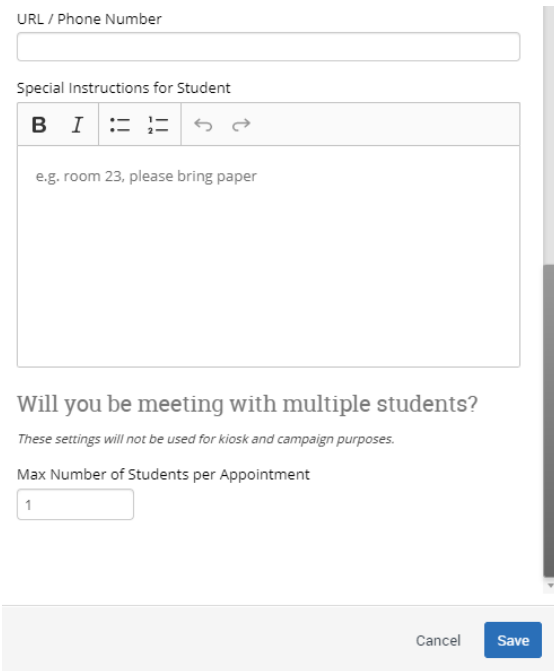
Step 7: Select the Care Unit that you are part of.

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



The screenshot shows a web form for setting up availability. It includes a text field for 'URL / Phone Number', a rich text editor for 'Special Instructions for Student' (with a sample text 'e.g. room 23, please bring paper'), a checkbox for 'Will you be meeting with multiple students?' (with a note 'These settings will not be used for kiosk and campaign purposes.'), a numeric input for 'Max Number of Students per Appointment' (set to 1), and 'Cancel' and 'Save' buttons at the bottom.

Step 10: In the *URL / Phone Number* field, add your meeting link for your appointments if you are hosting virtual 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 it 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!](#)

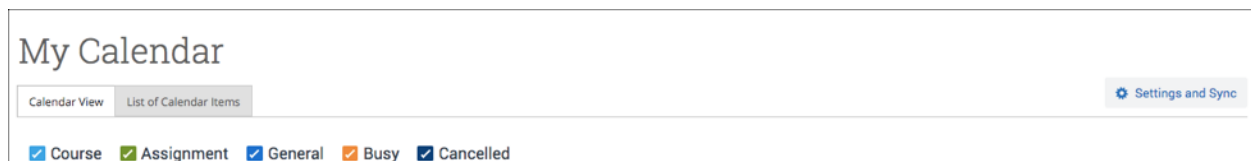
Appendix B: Sync Your **Outlook** Calendar

Integrating Your Calendar

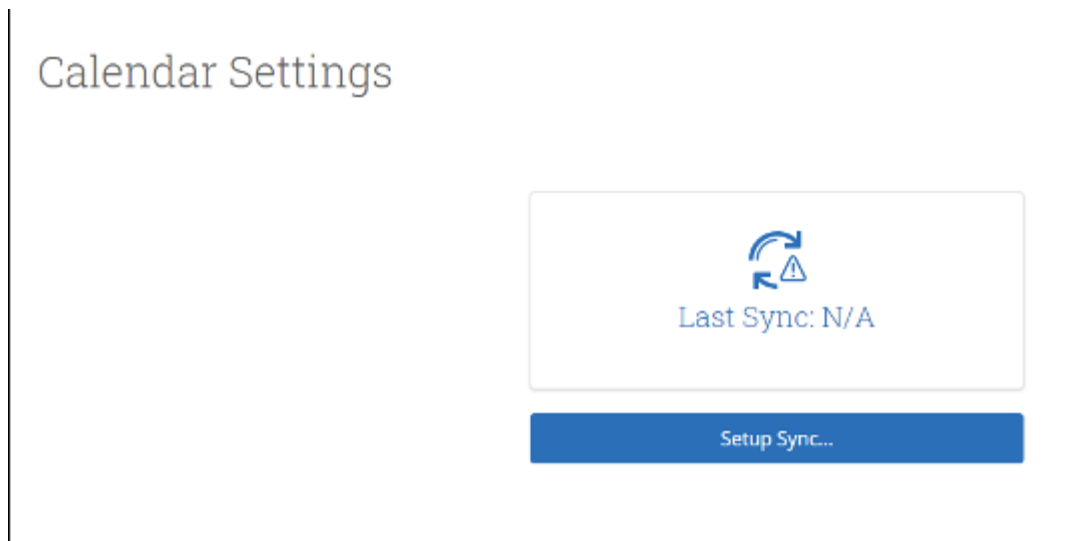
PLEASE ONLY SYNC YOUR CALENDAR IN THE PRODUCTION SITE

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.

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



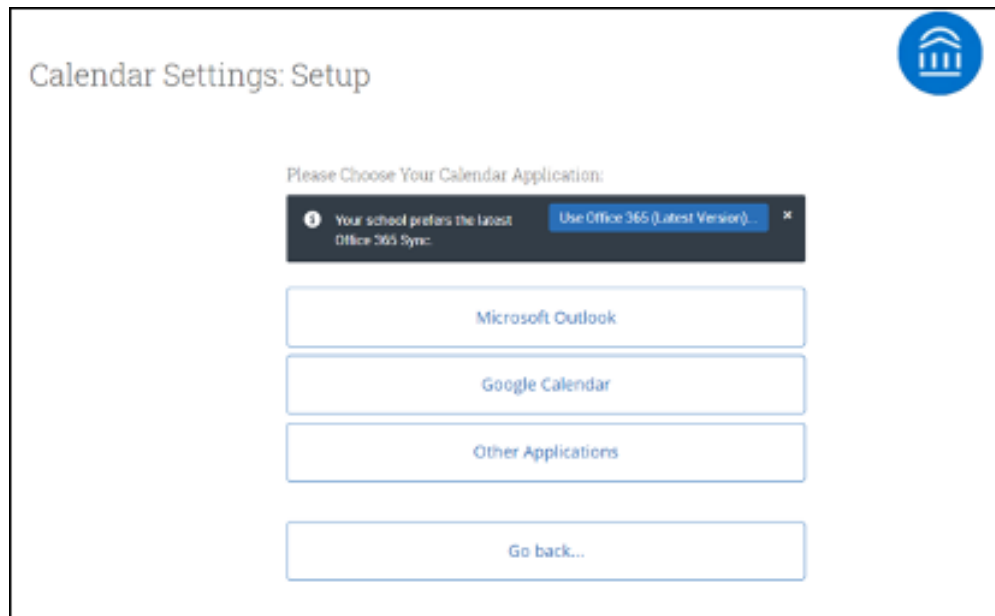
On the Calendar Settings page, select **Setup Sync...**



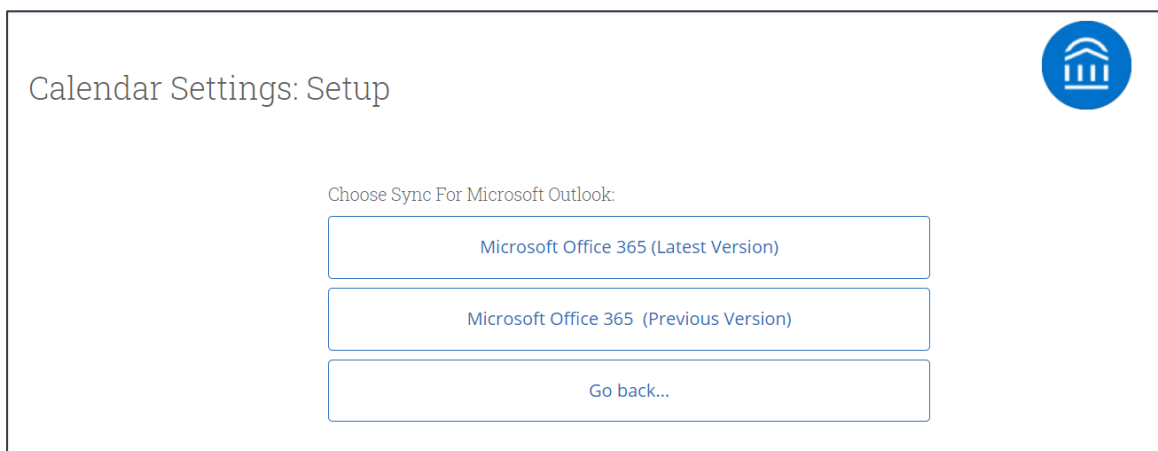
Appendix B: Sync Your **Outlook** Calendar (cont...)

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.



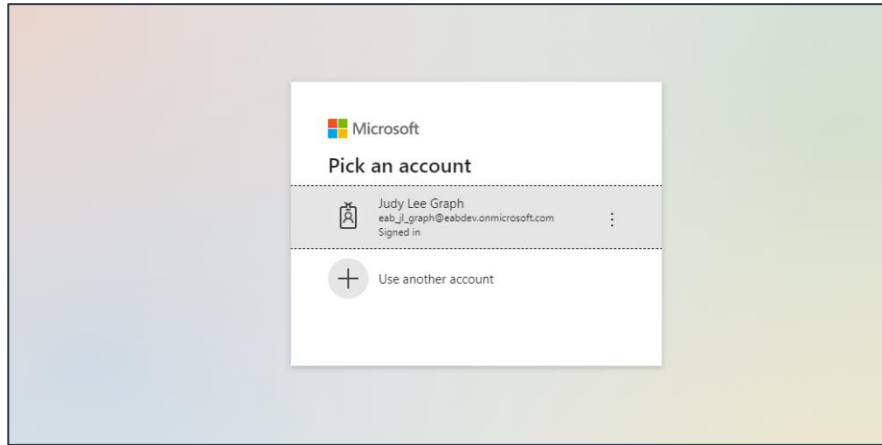
If you click **Microsoft Outlook** instead of the **Use Office365 (Latest Version)** button, you choose your Microsoft Outlook sync. Select **Microsoft Office 365 (Latest Version)** from the options.



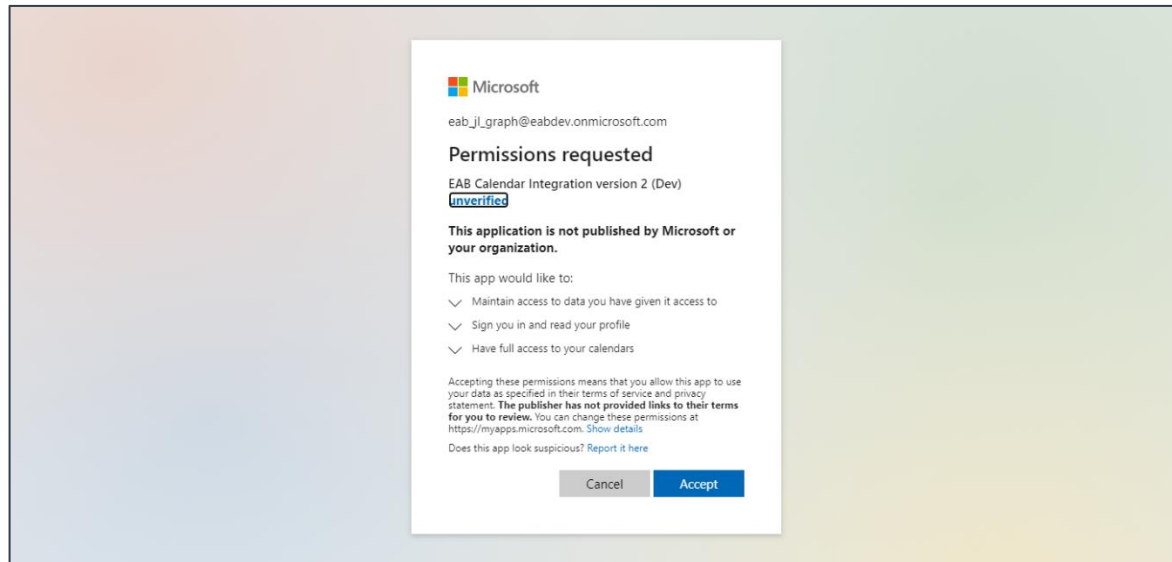
Regardless of which method you choose, the Microsoft login and authorization page opens. The page tells you to pick an account. Choose your professional account.

Appendix B: Sync Your **Outlook** Calendar (cont...)

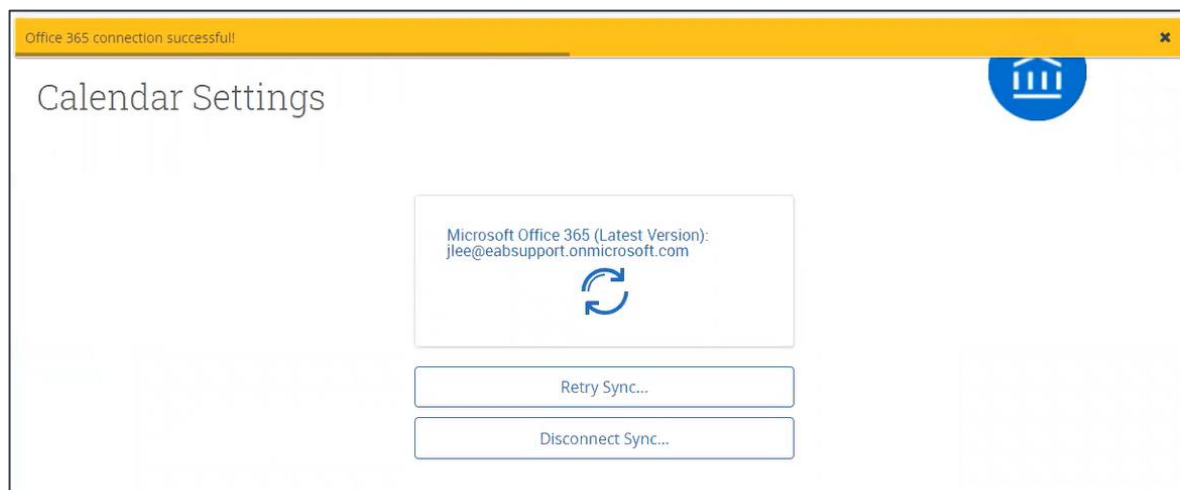
Integrating Your Calendar



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

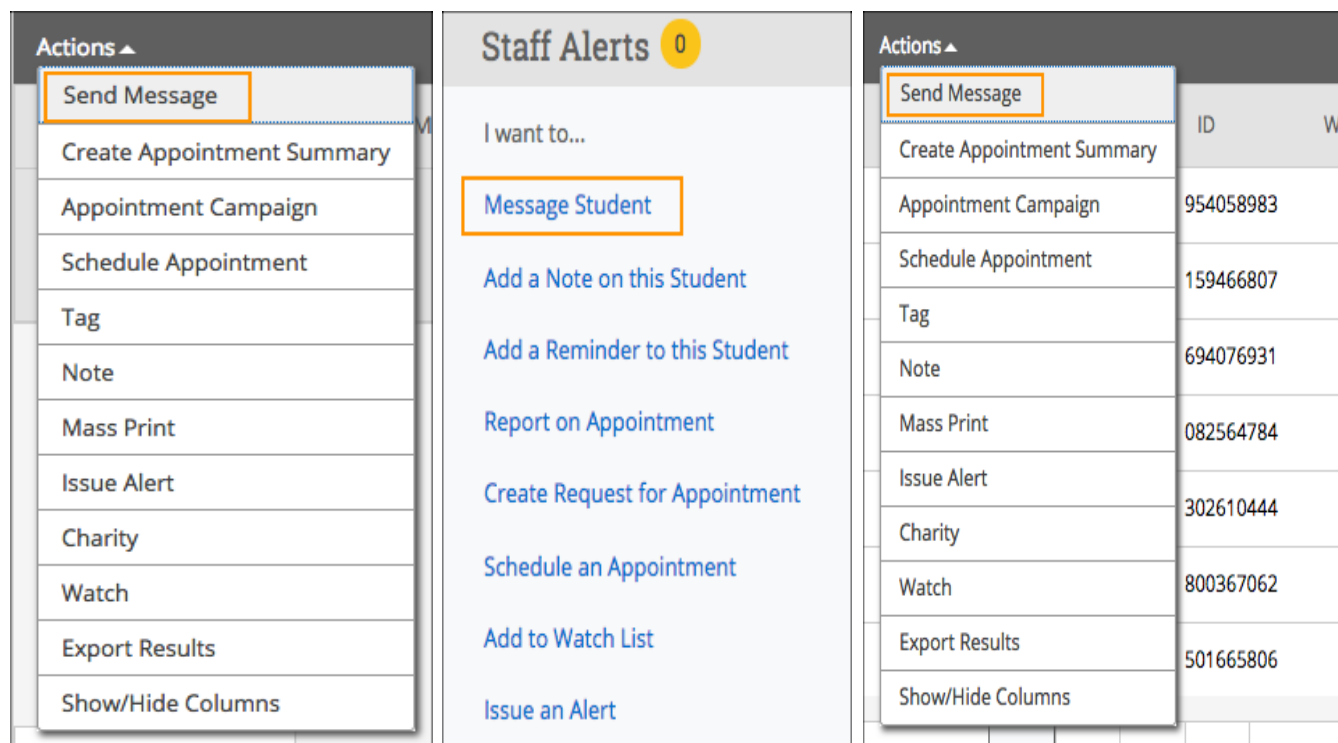
Navigate provides both [email and text messaging](#) for faculty and staff to communicate with students, either individually or en masse. Communicating with students through the platform creates records of those communication which can be accessible by other staff or faculty on your campus. In addition, 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!](#)

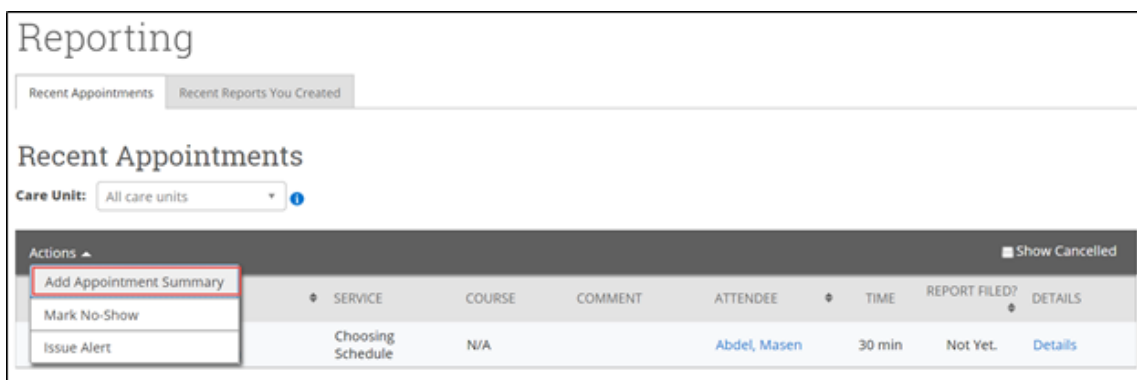
Appendix D: Add Appointment Summary Reports

Documenting a Student Interaction

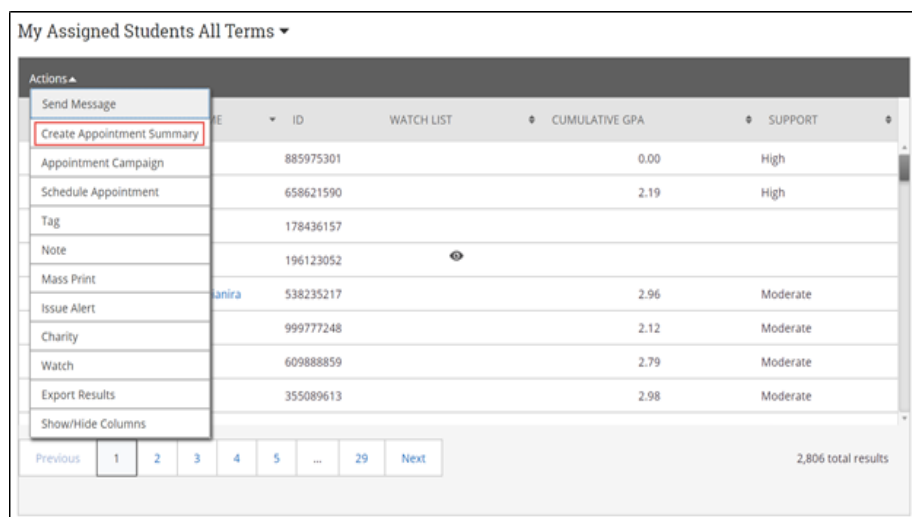
[Summary Reports](#) can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

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!](#)

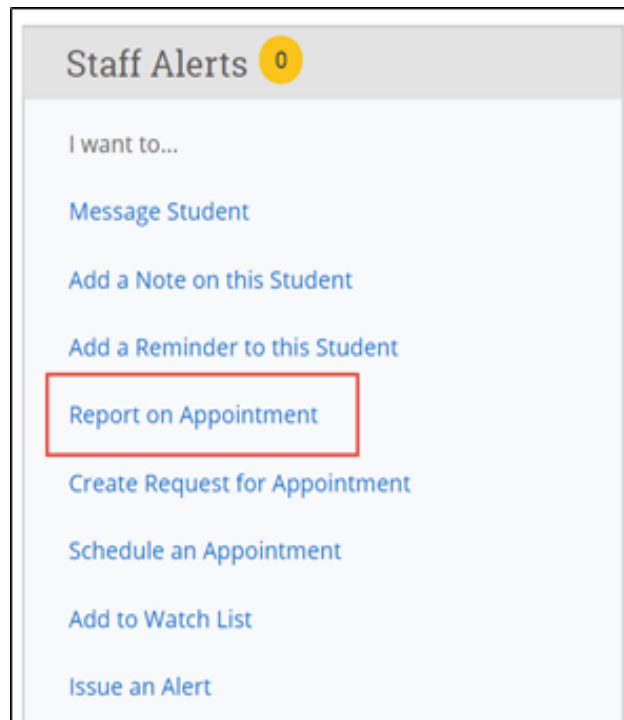
Appendix D: Add Ad Hoc Appointment Summary Reports

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 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”.

Review Students In Campaign

Actions ▾

<input type="checkbox"/>	NAME
<input type="checkbox"/>	Ellert, Channah
<input type="checkbox"/>	Malis, Philbert
<input type="checkbox"/>	Plaas, Claire

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!](#)

Appendix F: Creating an Appointment Campaign (cont...)

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.

Add Welcome Message, Nudges, and Success Message:

Nudges replace the Compose a Message functionality and allows for more communication from your school to students during an Appointment Campaign. Each nudge is an email or SMS message sent to your campaign list.

- Click **Add Welcome Message** to create your first nudge. You have a choice to create either an Email nudge or an SMS nudge. You must create at least one nudge per campaign. The nudge can be either an email or an SMS. Only one nudge type (email or SMS) can be sent per day. There are no limits to the amount of nudges you choose to send during the campaign.
- Enter a subject line and customize the message.
- Choose a Send Date. This is the date the nudge is to be sent. Nudges are sent in the morning of the date chosen when you create the nudge.
- After creating a nudge, click **Save Nudge** to add it to your campaign.
- You can also create a Success Message on the Nudges step of an Appointment Campaign. This is an email or SMS message sent the day after the recipient schedules all appointments for the campaign. It is for communication purposes only. Click **Add Success Message** to start creating a Success Message.
 - The **Add Success Message** page is like the Add Nudge page; however, there is no Send Date because the Success Message only sends after the student schedules an appointment.

Verify & Start: Review your campaign details, nudges, invitees, and advisors on this page. Click **Start Campaign** when you are ready to email the invites to the selected students.



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