Quick Reference Guide

EAB Navigate

Colorado State University

*This is a working document, more resources will be added throughout the year.
EAB Navigate Training Manual

This manual is designed to be quick reference material specific to the functions outlined in the EAB Navigate training for Navigate User. For more comprehensive information related to the EAB Navigate Platform please visit the Help Center located within the platform, or contact Latoya Noel at latoya.noel@colostate.edu.

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The Basics

Logging in

First go to: **csurams.campus.eab.com**

Do not put “www” in front of the web address.

This will take you to a CSU Single Sign-on page. Simply use your CSU EID and Password to log-in.

You can also access the SSC portal via the **“EAB Portal”** link located in Aries web. If this link is not visible please contact Latoya Noel to change your permissions in Banner.
THE HOME PAGE

Once you log-in, you will be brought to the “Advisor Home” page. From here you can see your specific list of students, or navigate to tabs that will let you see your upcoming appointments, manage your availability, or access the advising center.

The right side also offers you a variety of “Quick Links” and shows any “Upcoming Appointments.”

From this page you can click on any student to access more information, or change your advising term to view additional students.

Click on the question mark to access the EAB Navigate Help Center.
This menu offers a variety of functions within the platform.

“Home” will take you back to your “Advisor Home” page

“Conversations” will take you to the messaging and Email systems within the platform, which can be linked to your Outlook email

“Calendar” will take you to your calendar where you can manage your availability and schedule appointments with students. Which you should sync to your Outlook calendar.

“Campaigns” will take you to the outreach functions of the platform.

“Reminders” will display any upcoming alerts or reminders you have set for yourself.

“Advanced Search” will allow you to search from your list of students using specific criteria.

“Lists and Searches” are where your watch lists and saved searches can be found.

“Analytics” allows users to run some descriptive statistics on any group of students at CSU such as population GPA or risk by college

*Some Functions have been cut from this image.
THE STUDENT PROFILE

The student profile has information displayed in a way that is designed for you to be able to quickly gather some important information about a student prior to an appointment. In a student’s “gray box” you can easily see how many courses they have received a D or F grade in, how many courses they have repeated, how many courses they have withdrawn from, missed success markers, their cumulative GPA, credits earned, credit completion percentage, and their predicted risk level. Additionally, you can see their basic student information, and a variety of quick links that you can click to easily navigate to perform another function.
Now that you have a basic understanding of the platform, you will want to set up your calendar in order to complete appointment campaigns and allow for other calendaring functions within the platform.

**Syncing your Outlook**

- You will see a notification instructing you to navigate to the Calendar page to begin the setup.

![Calendar Sync Notification](image)

- On the Calendars page, if you have already synced your calendar via a non-OAuth method, you’ll see a yellow banner directing you to authorize OAuth syncing. (If you have not already synced your calendar via another method, you will not see a yellow banner but can continue to the Settings and Sync and sync your calendar via OAuth.)
• Upon clicking the button, you will be routed to login.microsoftonline.com. If you are not already signed into Office 365, you will be prompted to sign in.
  – **NOTE:**
    • EAB does NOT store password information.
    • Changing your Office 365 password does not require re-connecting via OAuth, since OAuth uses tokens.

• 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 sync will 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.
Again, please note that if you use Google Calendar sync or On-Premise Exchange calendar sync, you will not be affected by the OAuth change outlined above.

Then, adjust the calendar permission level. To do this, select “o365ews_sscampus” and then click on the drop down menu and select “editor” then click apply.
At this point all appointments made in Outlook will reflect in your Navigate calendar.

Advanced Searches

The advanced search function is designed to allow you to filter your students and create lists using a variety of search criteria. Once you have created a search, you can send a mass message, save the list for future use (This list will remain dynamic), create a campaign, or export the list into excel.

Search options and overview

Using the magnifying glass located in the sidebar, you can do a simple search, or select “Show Advanced Filters” to search my more criteria.
Each category of criteria has a drop down menu, which you can click to expand.

By default when you run an advanced search you are searching all students at CSU. If you wish to only search within the set of students assigned to you select “My Students Only”.

By default only students who are active in the current students are returned in an advanced search. To include students who are enrolled but not active select “Include Inactive”.
Advanced Search Cheat Sheet

Student information
First name, last name, from last name to last name (for narrowing down lists alphabetically), Student ID, Gender, Race, Watch list (which you would have created), transfer status, category, tag

You can search by multiple categories at once:
- Academic probation - you can search a variety of AP terms
- Admissions Index - you can search by specific score or multiple scores
- Learning Community - Any learning community on campus
- INTO - INTO CSU students
- Key - You can search by each different Key community
- Community for Excellence
- Expected Grad Term
- First Generation Status
- Foster Youth
- Fresh Start
- Gender
- Non-Traditional
- Pell-Eligible
- Planned Leave
- Race and Ethnicity
- Residence Hall
- Semester at Sea
- Sport
- Study Abroad
- Transfer institution
- Veteran Status

Area of Study
College or School, Major (can search multiple), Concentration, Degree

*We cannot currently search by minors. This is a feature that has been requested and is in development.

Performance Data
Minimum and maximum cumulative GPA, Minimum and Maximum credits earned, minimum and maximum hours attempted, minimum and maximum credit completion percentage

Term Data
Minimum and Maximum Term GPA, Enrolled with professor, year classification

Course Data
Search via specific courses (Can search multiple), Course section, and course status. If Grad Received is selected, you can then search by minimum and maximum course grade.

Assigned To
Advisor, tutor, coach

Success Indicators
Predicted Risk Level, Success markers, minimum and maximum success markers.
Actions

Some common actions you may take once you have generated a list of students via an advanced search are listed below.

- You can send a mass message to students in a saved search.
- You can send an appointment campaign, offering a link for students to sign up for an appointment.
- You can schedule appointments or events with a saved search.
- You can write a mass note on a list of students.
- You can add these students to a watch list.
- You can export this list to an excel document.

Note: Saving an advanced search creates a dynamic “SAVED SEARCH” list. This means that this list will update as students are added or removed based on your chosen criteria. A WATCH LIST will remain static. This means a watch list will not update unless you manually make changes.
Appointment Campaigns

An appointment campaign is a mass email sent strategically to a list of students inviting them to sign-up for an appointment. Campaigns are tied to an action, where as a message just relays information. Appointment Campaigns are meant to be strategic, targeted student outreach.

Setting up your availability

The first step in setting up an appointment campaign will be creating your availability. To do this, you will need to click on the “My Availability” Tab on your Advisor Home page.

This tab will take you to a screen where you will need to select “Add Time.”

Clicking on “Add Time” will open up a window for you to set time constraints.

You can set your availability based on the days of the week, and in chunks of time. For an appointment campaign you would then select “Campaigns.”

Duration indicates when the appointments would take place, you can set a range of dates or a semester.

Location will be where the appointments are taking place, specifically where a student would check in i.e. a front desk.
**Sending an Appointment Campaign**

There are multiple ways to send an Appointment Campaign. You can do this as an “Action” once you have created a student list from an advanced search, or you can do it from the “Advanced Search” tab in the sidebar. Both paths should take you to the following screen.

![New Invitation Campaign](image)
When making a campaign it’s important to check your availability settings. First, make sure **Campaigns** is selected. Second, make sure the **Care Unit**, **Location** and **Service** you set in your availability matches your campaign settings. Failure to not align these settings will cause you to not appear in the list of available organizers.
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The name of your campaign is for your use only i.e. Academic Probation. Next you can review your students removing or adding them as you see fit.

Next you can select from a list of advisors who also have availability set to the location you selected when defining your campaign.

Lastly you can customize the message you wish to send. Only change the text in the green boxes then select continue.
Navigate Student Success Collaborative Campus- Colorado State University
This is your last chance to make any changes to your campaign. You can also select if you want non-organizers (the people making the appointments) or organizers (the people non-organizers schedule appointments with) to receive any notification and by which means.

To verify the campaign was successful select campaigns in the sidebar and appointment campaigns.