Advising Technology User Guide
Colorado State University

**This is a working document and will continue to be updated as software and technologies change. We encourage you not to download it.*

For assistance or request for training please submit a help ticket through either of these options:

- Submit a support request through the Advising at CSU website or https://advising.colostate.edu/submit-support-request/

Advising Technology User Guide Contents

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 see the Support Resources at the end of this document to submit a help ticket.

Contents

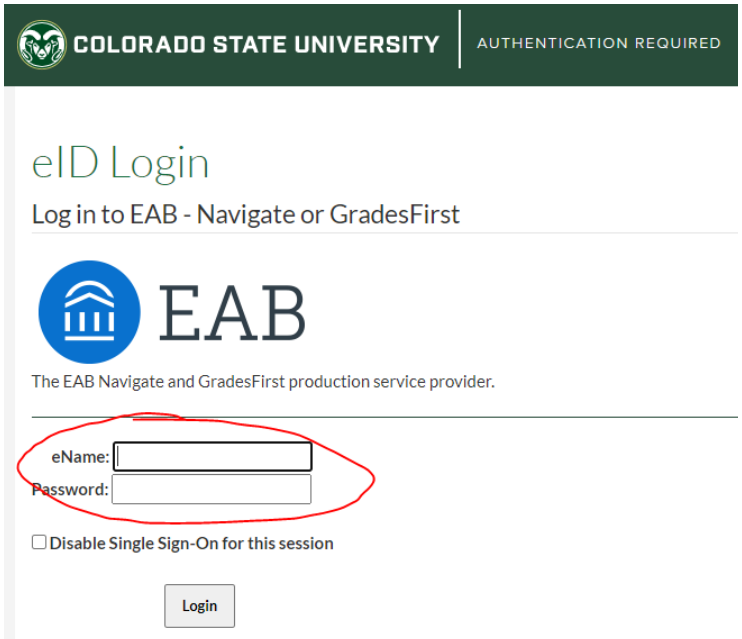
Navigate Basics

Logging in

Login at http://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 Navigate**” link located in ARIESweb. If this link is not visible, please submit a Help Ticket to change your permissions in Banner (see image below).

General Tools

- BANNER Administrative Pages ?
- Curriculum Management System (CIM)
- Workflow Access
- Class Schedule
- Class Schedule Report
- Transferologylab
- Course Catalog
- Institution Search (High School, College, Other)
- RamSelect (get lists or email selected populations)
- Classroom Schedules (Classes Only)
- Reserve A Classroom
- Graduate School Reports
- Other Reports
- CRN Lookup
- EAB Navigate
- For student-specific tools, first search for a student

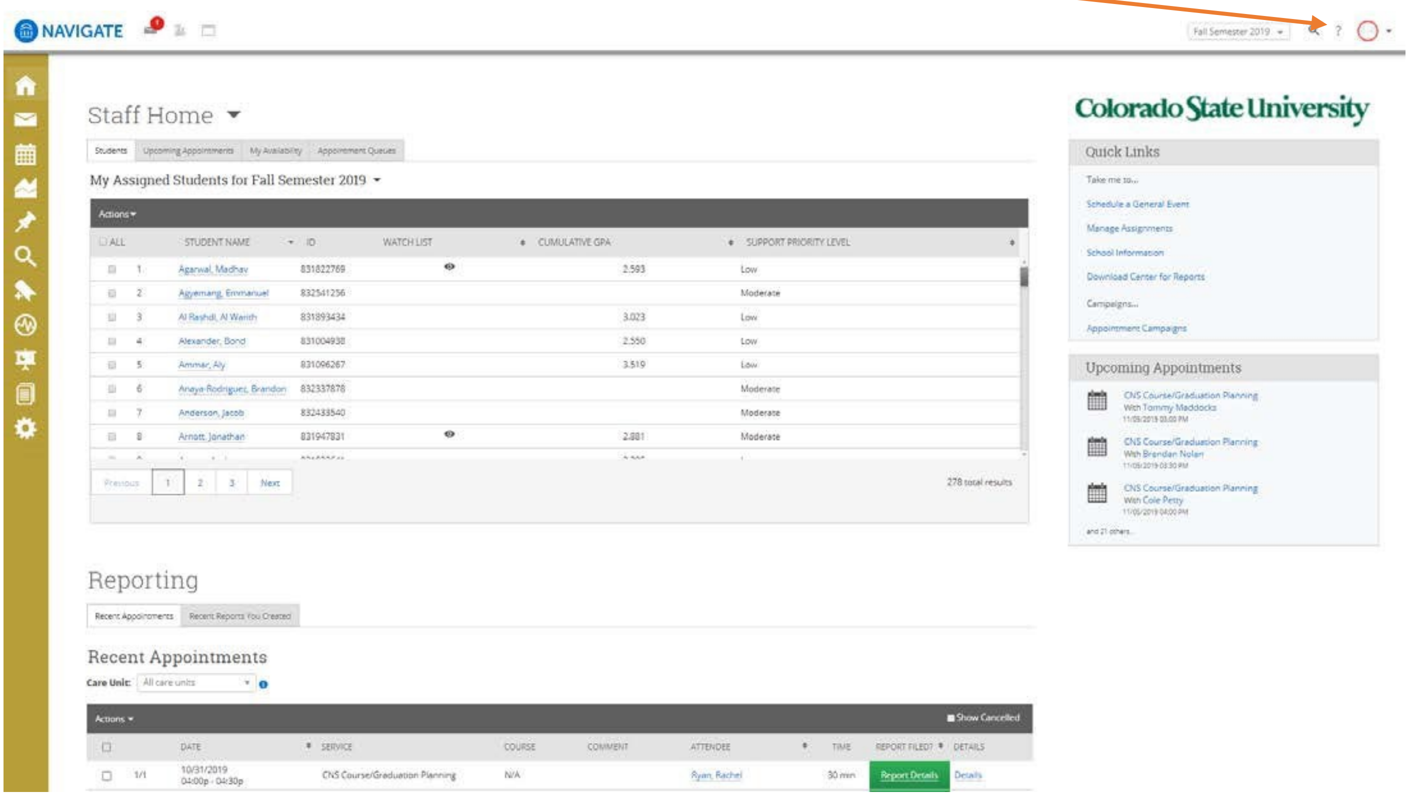
The Navigate Home Page

Once you log-in, you will be brought to the "Staff 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.

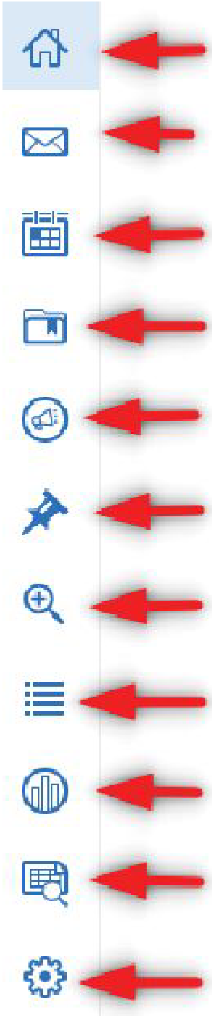
The right side also offers you a variety of "Quick Links" and shows any "Upcoming Appointments."

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.



Sidebar



Home - takes you back to your "Advisor Home" page.

Conversations - takes you to the messaging and email systems which can be linked to your Outlook email.

Calendar - takes you to your calendar to manage availability and schedule appointments with students.

Cases - show you all of the cases that you have been assigned to manage.

Campaigns - takes you to the outreach functions of platform.

Reminders - displays any upcoming alerts or reminders you have set for yourself.

Advanced Search - allows you to search from for students using specific criteria, categories, tags, etc.

Lists and Searches - where your watch lists and saved searches can be found.

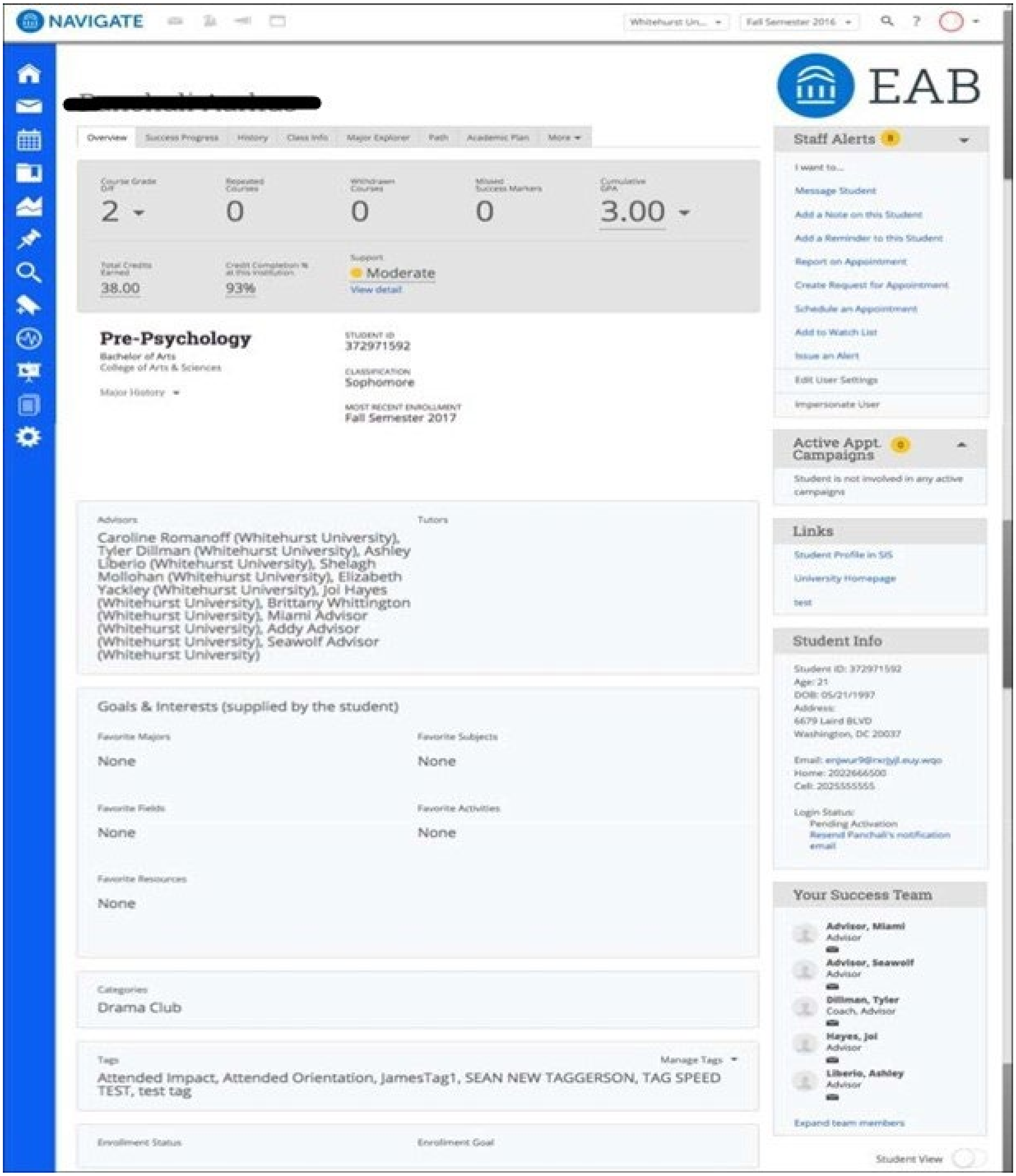
Analytics - allows users to run descriptive statistics on any group of students at CSU such as population GPA or risk by college.

Reporting - tool in Navigate used to review and analyze student and staff data.

Administration - tool to see Staff Teams and other options based on your role in Navigate.

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 "Support Priority Level," which indicates student's likelihood to achieve the configured success outcome, given their unique characteristics and how similar students performed in the past. It is measured as "high," "moderate," or "low." Additionally, you can see their basic student information and quick links to navigate to other functions (see image below for student profile).


NAVIGATE
EAB
[redacted]
Overview
Success Progress
History
Class Info
Major Explorer
Path
Academic Plan
More
Course Grade D/F
2
Repeated Courses
0
Withdrawn Courses
0
Missed Success Markers
0
Cumulative GPA
3.00
Total Credits Earned
38.00
Credit Completion % at this Institution
93%
Support
Moderate
View detail
Pre-Psychology
Bachelor of Arts
College of Arts & Sciences
Major History
STUDENT ID
372971592
CLASSIFICATION
Sophomore
MOST RECENT ENROLLMENT
Fall Semester 2017
Advisors
Caroline Romanoff (Whitehurst University), Tyler Dillman (Whitehurst University), Ashley Liberio (Whitehurst University), Shelagh Mollohan (Whitehurst University), Elizabeth Yackley (Whitehurst University), Joi Hayes (Whitehurst University), Brittany Whittington (Whitehurst University), Miami Advisor (Whitehurst University), Addy Advisor (Whitehurst University), Seawolf Advisor (Whitehurst University)
Tutors
Goals & Interests (supplied by the student)
Favorite Majors
None
Favorite Subjects
None
Favorite Fields
None
Favorite Activities
None
Favorite Resources
None
Categories
Drama Club
Tags
Manage Tags
Attended Impact, Attended Orientation, JamesTag1, SEAN NEW TAGGERSON, TAG SPEED TEST, test tag
Enrollment Status
Enrollment Goal
Staff Alerts
I want to...
Message Student
Add a Note on this Student
Add a Reminder to this Student
Report on Appointment
Create Request for Appointment
Schedule an Appointment
Add to Watch List
Issue an Alert
Edit User Settings
Impersonate User
Active Appt. Campaigns
Student is not involved in any active campaigns
Links
Student Profile in SIS
University Homepage
test
Student Info
Student ID: 372971592
Age: 21
DOB: 05/21/1997
Address:
6679 Laird BLVD
Washington, DC 20037
Home: 2022666500
Cell: 2025555555
Login Status:
Pending Activation
Your Success Team
Advisor, Miami
Advisor
Advisor, Seawolf
Advisor
Dillman, Tyler
Coach, Advisor
Hayes, Joi
Advisor
Liberio, Ashley
Advisor
Expand team members
Student View

The Success Progress Tab

The Student Profile's **Success Progress** tab located within an individual student's profile provides key insight into different variables that might be indicators of eventual success for the student. The metrics are based on institutional research in collaboration with academic departments.

Overview | Success Progress | History | Course Info | Major Explorer | More

Predicted Influencers

This table shows positive, negative and neutral influencers reported by the predictive model for this student. This is not an exhaustive list of all influencers in the model, but includes the most representative in each category.

	Negative Influencers	Neutral Influencers		Positive Influencers	
Program of Study	-	Percentile Rank in Major	0.57	Average Outcome In Major	0.74
Performance	-	GPA Trend	-0.01	Cumulative GPA	2.98
				Total Number of D/F Grades Earned	1.0
Progress	-	Average Credits per Term	6.71	Average Outcome in Credit Range credits	120+
		Earned to Attempted Credit Ratio	0.93		
		Lifetime Accumulated Credits	170.0		
Pre-Enrollment Data	-	Proportion Transfer Credits	0.38	-	

Support Priority Level Low

Success Markers

The student has missed guidelines for progress. Acting on them can help get the student back on track for successful completion.

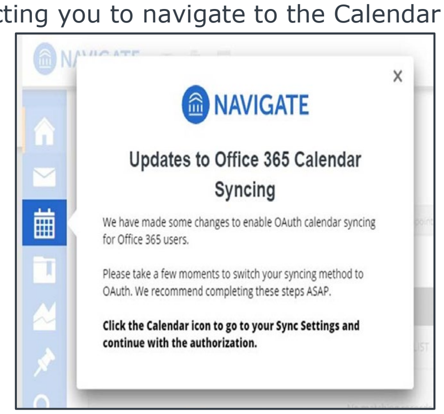
○ Completed ◉ Missing ○ Upcoming

Calendaring

Now that you have a basic understanding of the platform, you will want to set up your calendar to complete appointment campaigns and allow for other calendaring functions within the platform.

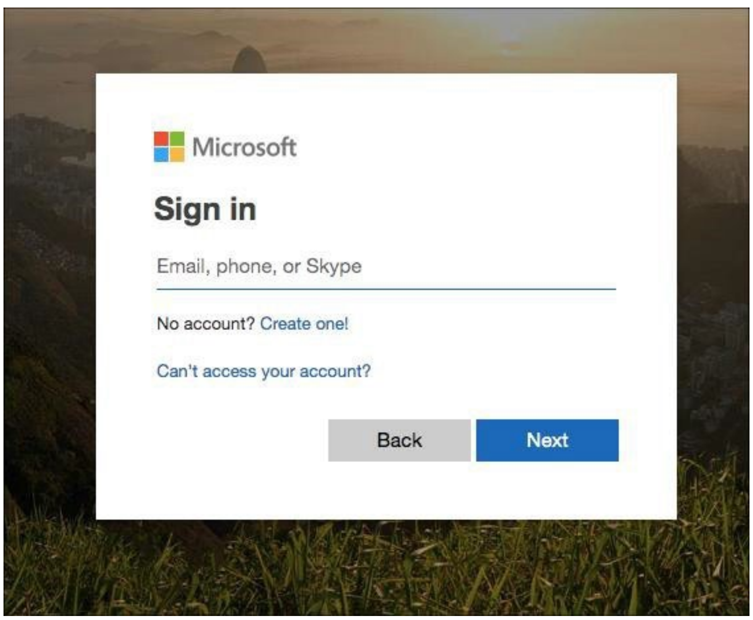
Syncing your Outlook

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

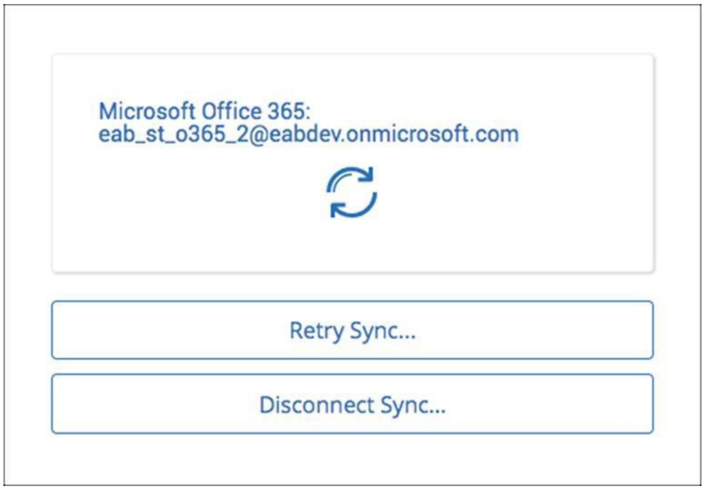


- On the Calendars page, if you have already synced your calendar via a non-OAuth method, you'll see a yellow banner directing you to authorize OAuth syncing. (If you have not already synced your calendar via another method, you will not see a yellow banner but can continue to the Settings and Sync and sync your calendar via OAuth.)

- Upon clicking the button, you will be routed to login.microsoftonline.com. If you are not signed into Office 365, you will be prompted to (see screenshot below). Note: EAB does NOT store password information.
- Changing your Office 365 password does not require re-connecting via OAuth, since OAuth uses tokens.

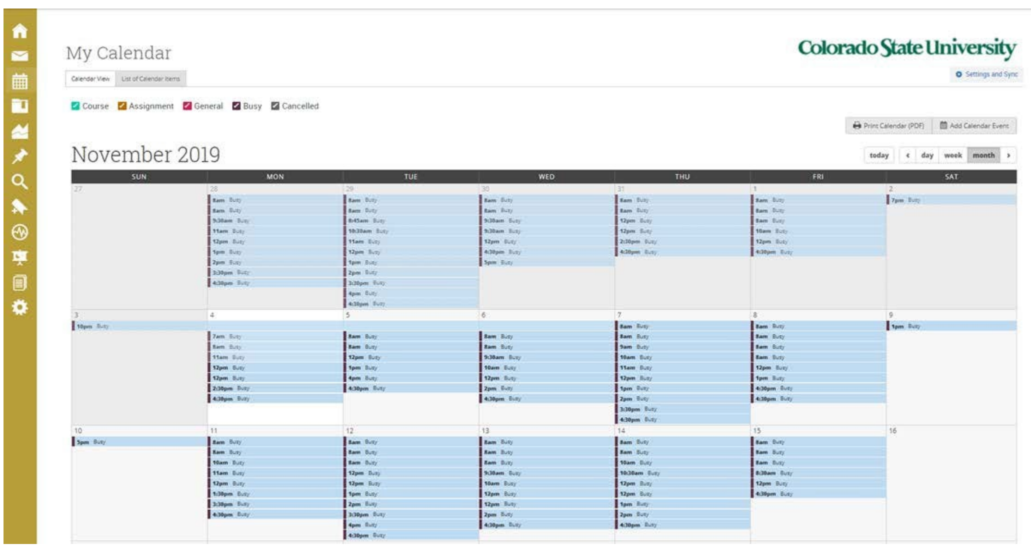


- After signing in, Office 365 will ask you to grant permission for the application to access your calendar. Pressing "Accept" will authorize and begin the syncing.
- The browser will return to the Calendar Integrations page. The sync will show the timestamp for the last successful sync (or any applicable error message) and will include options for you to Retry or Disconnect the sync as needed.



- Again, 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_ssccampus" 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.

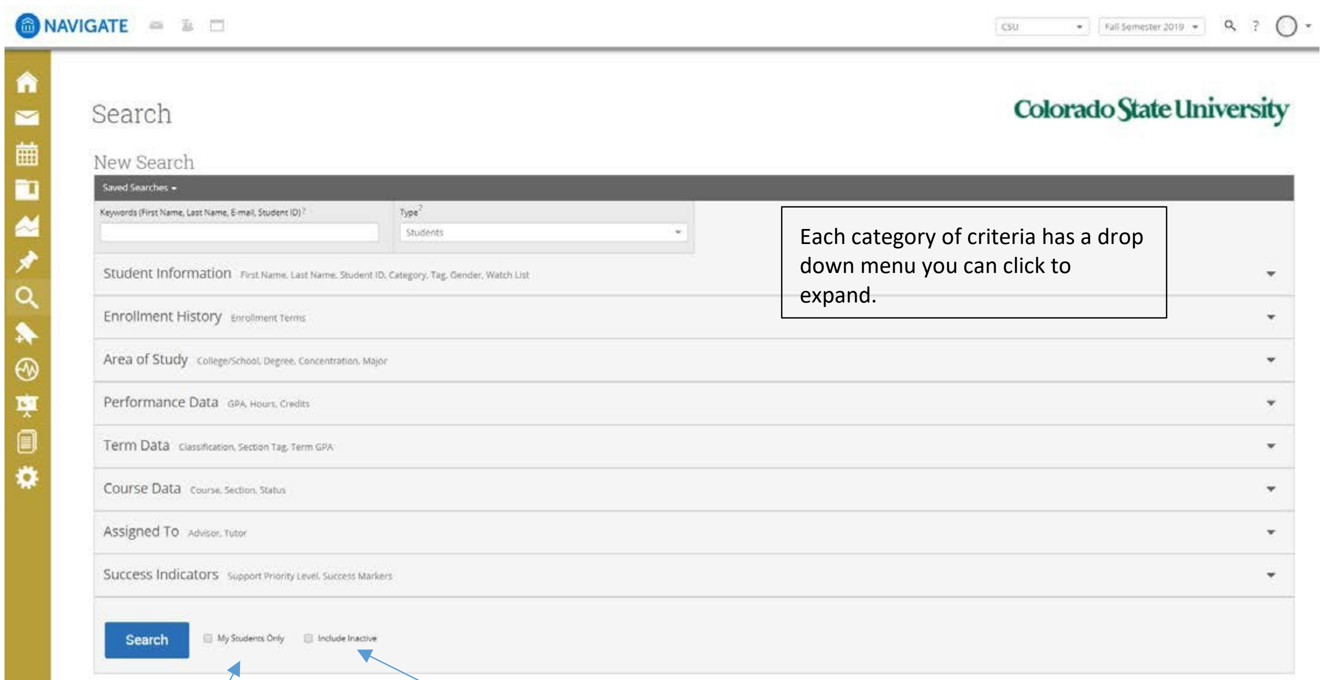


Advanced Searches

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. You can do searches for all CSU undergraduate students in Navigate. Below are basic steps of the Advanced Search Tool. For more step-by-step information and advanced tips, see the "Helpful Resources from Navigate's Help Center" page.

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



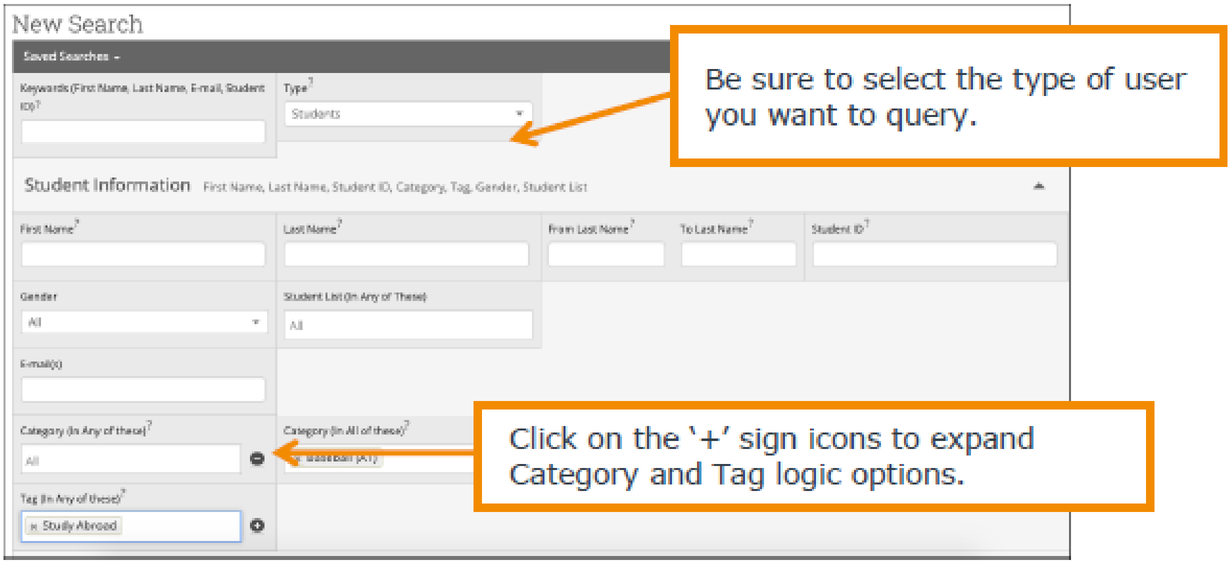
Each category of criteria has a drop down menu you can click to expand.

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 as current students are returned in an advanced search. To include students who are enrolled but not active select “Include Inactive”

Objective: Find students that are in a specific category or are associated witha specific tag.

Advisors might use this search to identify students that are associated with a specific group on campus that have completed specific milestones..



Advanced Search Cheat Sheet

Student Information

First name, last name, from last name to last name (for narrowing down lists alphabetically), Student ID, Gender, Watch List (which you would have created), transfer status, etcetera.

- ***Category***- A search option which is pulled from attributes in CSU's Operational Data Store (the database of CSU's student and employee information). Visible on student profile, searchable in Advanced Search.

You can search for multiple ***Categories*** at once by choosing "In Any of these" or "In All of these." While *Any* statements allow for the creation of more inclusive searches, selections made in *In All of these* or in *In None of these* fields limit the scope of a search. "In Any of These" is like A category "or" B category, whereas, "In All of These" is like A category "and" B category. See example categories below:

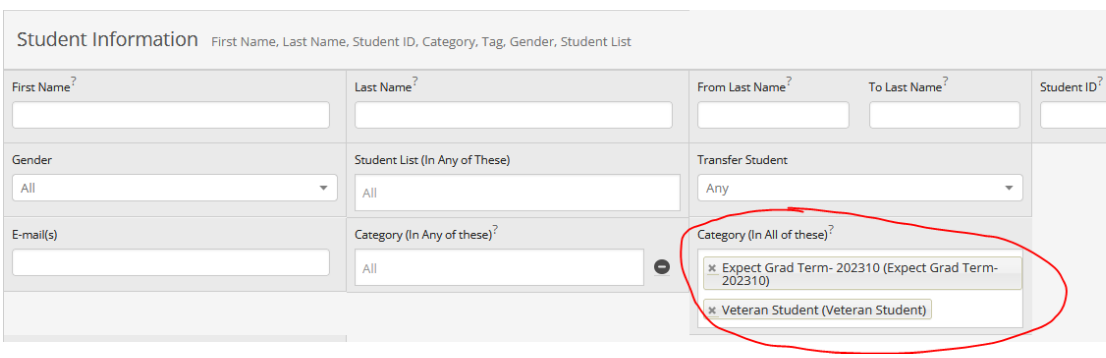
First Category	Additional Category (click "+" button to access additional category)	Additional Category
Admissions Index- you can search by specific eligible	Non-Traditional score or multiple scores	
Learning Community-Any Learning Community on campus	Planned Leave	Race and Ethnicity
INTO-INTO students	Residence Hall	

Key – You can search each different Key		Sport
Community for Excellence	Study Abroad	
Expected Grad Term	Transfer Institution	
First Generation Status	Veteran Status	
Foster Youth		
Planned Leave		

Note: effective November 2021, you search for minors using Categories by including "minor" at the beginning of a search. For example, "Minor in Geospatial Info Sci for NR (GSIQ)" is a specific minor that will show up in Navigate now.

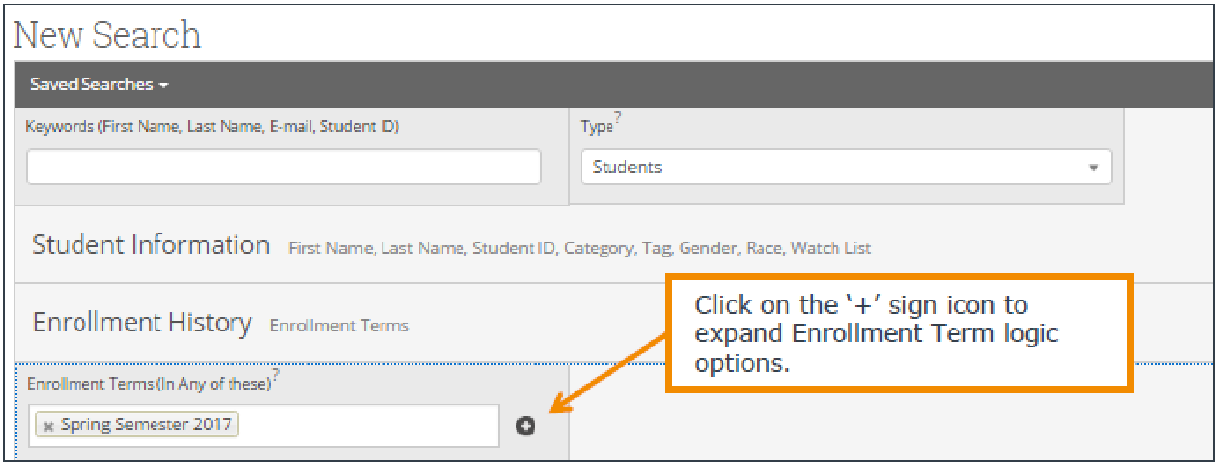
Sample Category Search

Below is an example of a search using two categories to find veteran students graduating Spring Semester 2023. The "Expect Grad Term – 202310" category are students graduating during Spring Semester 2023 and "Veteran Student (Veteran Student)" category filters by veteran students. Students who have both of these attributes will display in the results since the "In All of these" criteria is selected.



- **Tag** - like categories, but they allow individual users to group similar students together by a common affiliation not otherwise captured in the data (e.g., choir member, interest in graduate school). All users can utilize tags to search for, report on, or communicate with these groups of students. Only some users (based on institutional configuration) can create and edit tags. A student can be assigned multiple tags, and the tags that have been applied to a student display at the bottom of the student's overview page. Examples of tags include: "Precipitous Grade Change," "At least one F," and "Cleared Probation."

Enrollment History
Creates logic statements to search for students by their enrollment status in a variety of terms.



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

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 Grade Received is selected, you can then search by minimum and maximum course grade.

Assigned To
Enter information into fields in this bucket to pull lists of students assigned to specific team members such as advisor, tutor, or coach.

Success Indicators
Predicted Risk Level, Success markers, minimum and maximum success markers. Run a search using these filters to identify students based on predicted support level or success marker completion status.

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 Student List - you can export this list to an excel document.

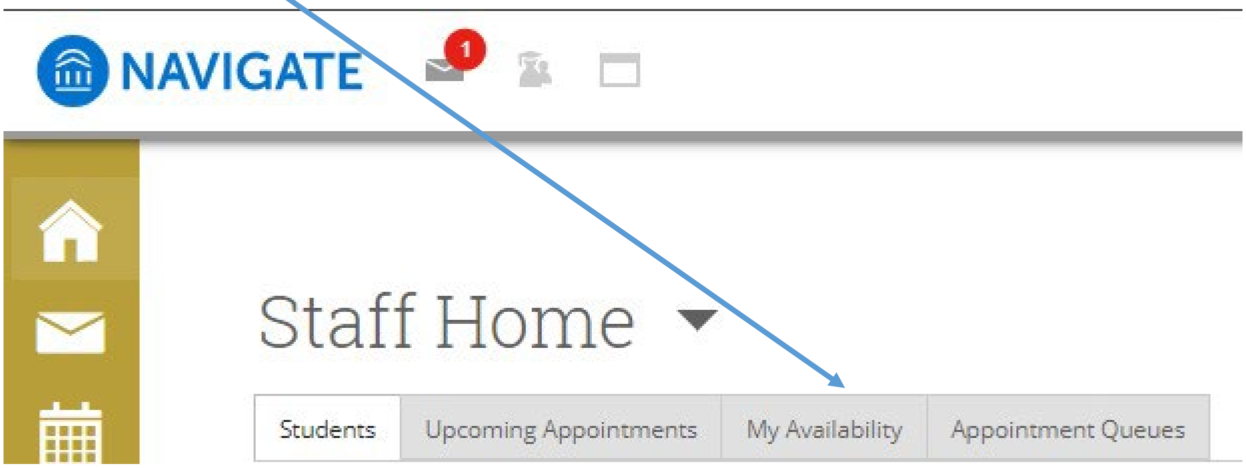
Note: Saving an advanced search creates a dynamic “**SAVED SEARCH**” list. This means that this list will update as students are added or removed based on your chosen criteria. A **Student List** will remain static. This means a Student List will not update unless you manually make changes.

Appointment Campaigns

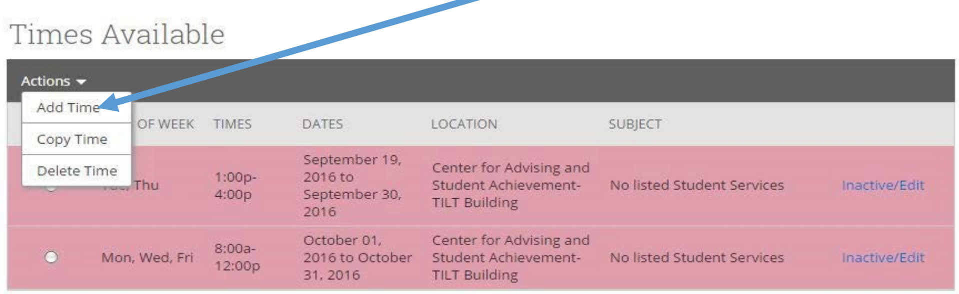
An appointment campaign is a mass email sent strategically to a list of students inviting them to sign-up for an appointment. Campaigns are tied to an action, where as a message just relays information. Appointment Campaigns are meant to be strategic, targeted student outreach.

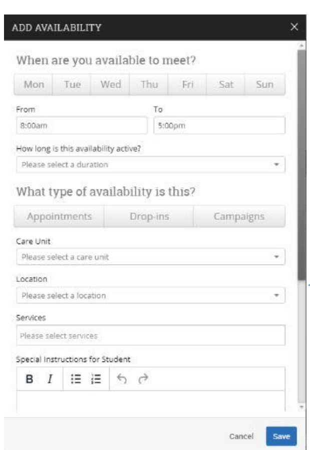
Setting up your availability

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."





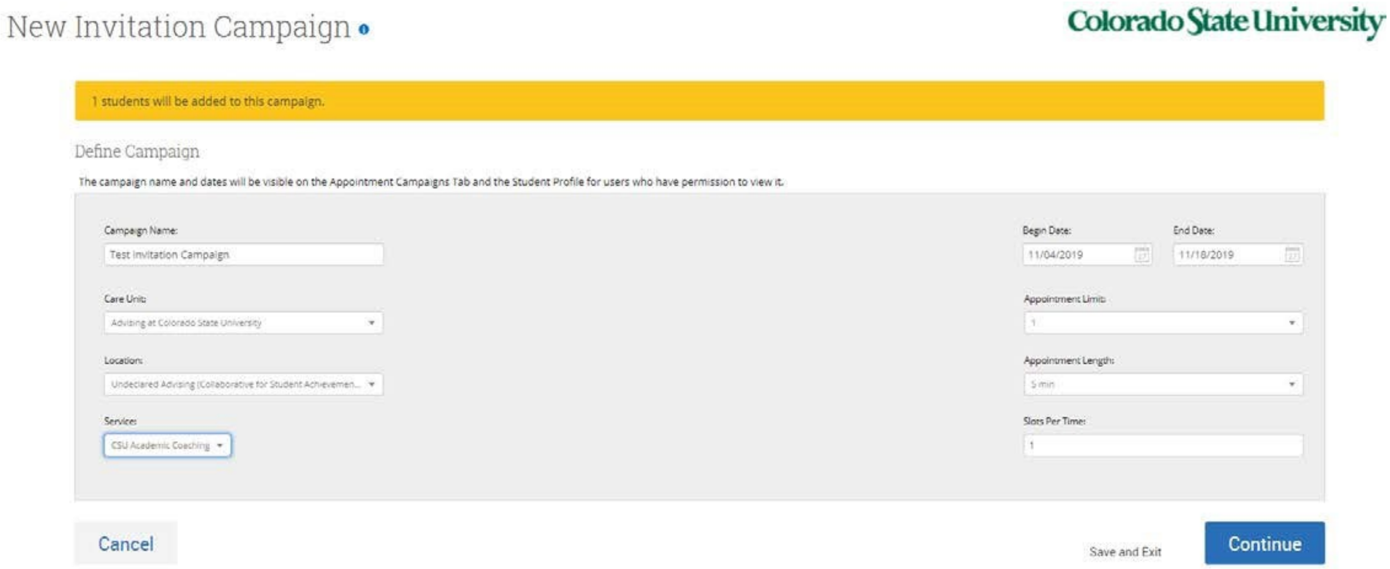
Clicking on "Add Time" will open a window for you to set time constraints.

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 can be where the appointments are taking place, specifically where a student would check-in (i.e., "Front Desk")

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.

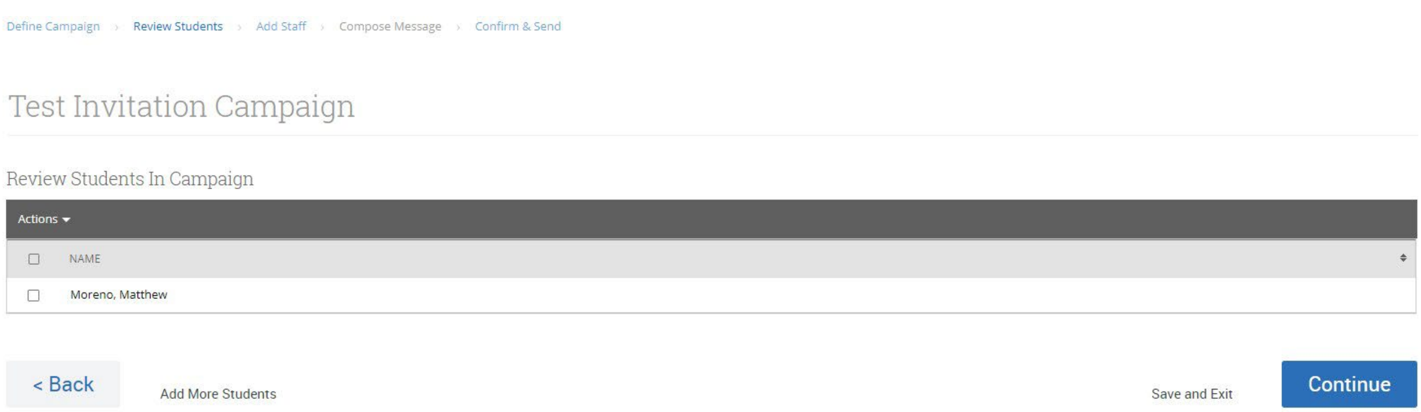


Campaign Name

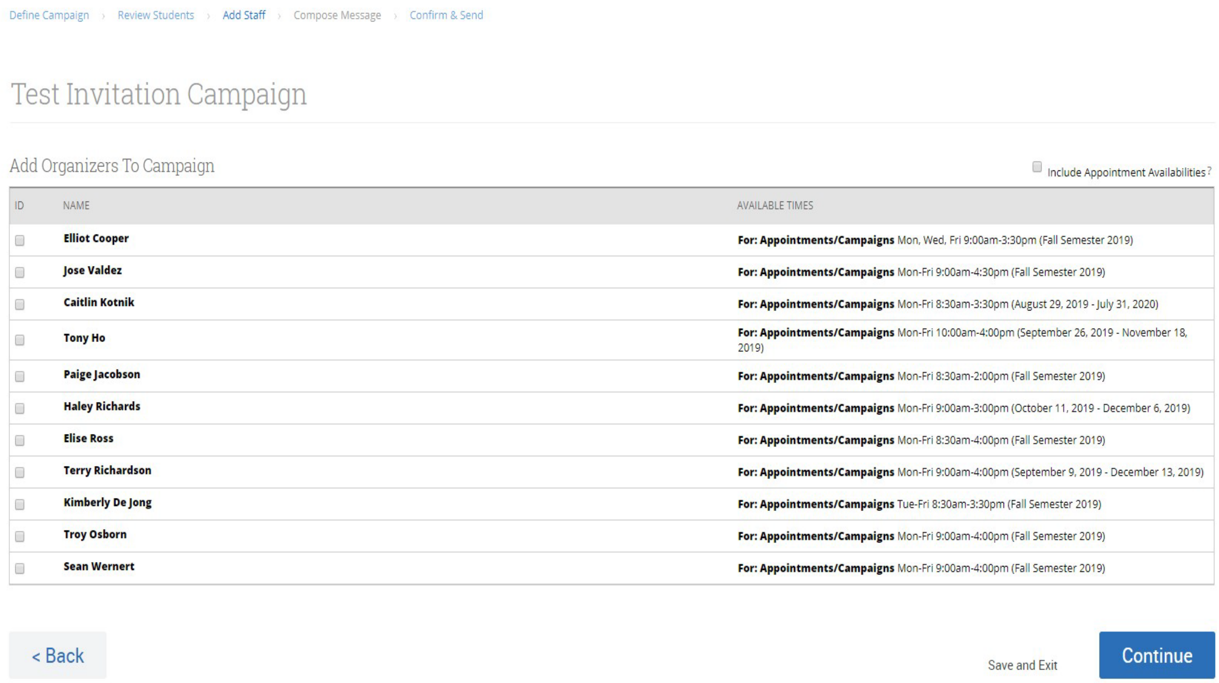
Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student. Make sure that you adhere to your institution’s naming policy, otherwise other users will not be able to evaluate the impact of your campaigns.

Note. Start campaign names with the most important info. Academic term is the most important! Some formats could include: Term, Population, Purpose; Term, Population, College, Purpose; Term, College, Purpose, Last name of user who created the campaign. Examples include: “F19 Freshmen Reg Campaign”, “F20 1st Time Freshmen Business 15-to-finish”, or “S21 Freshmen Bio Major Decl, J. Smith”

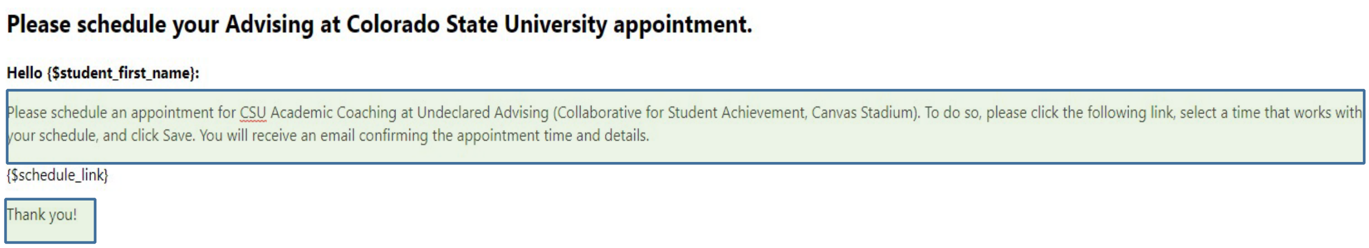
The name of your campaign is for your use only (i.e., Academic Probation). Next you can review your students removing or adding them as you see fit.



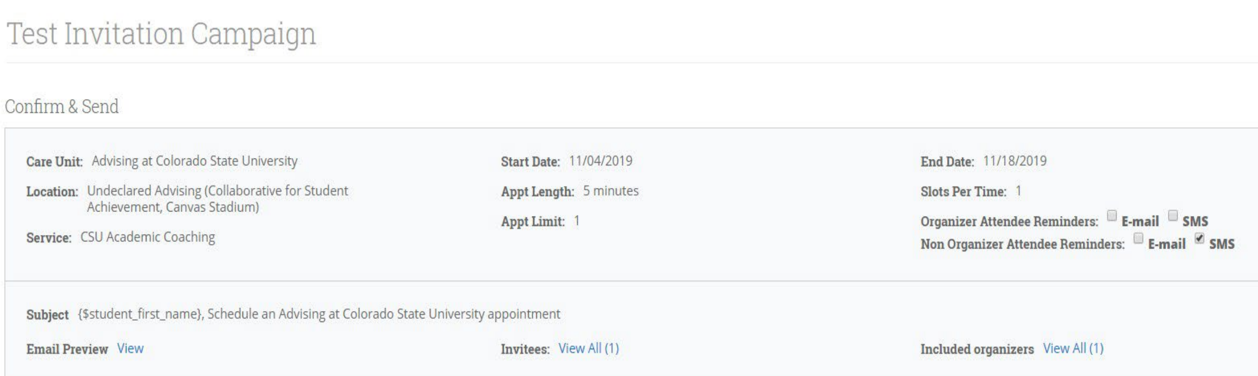
Next you can select from a list of advisors who also have availability set to the location you selected when defining your campaign.



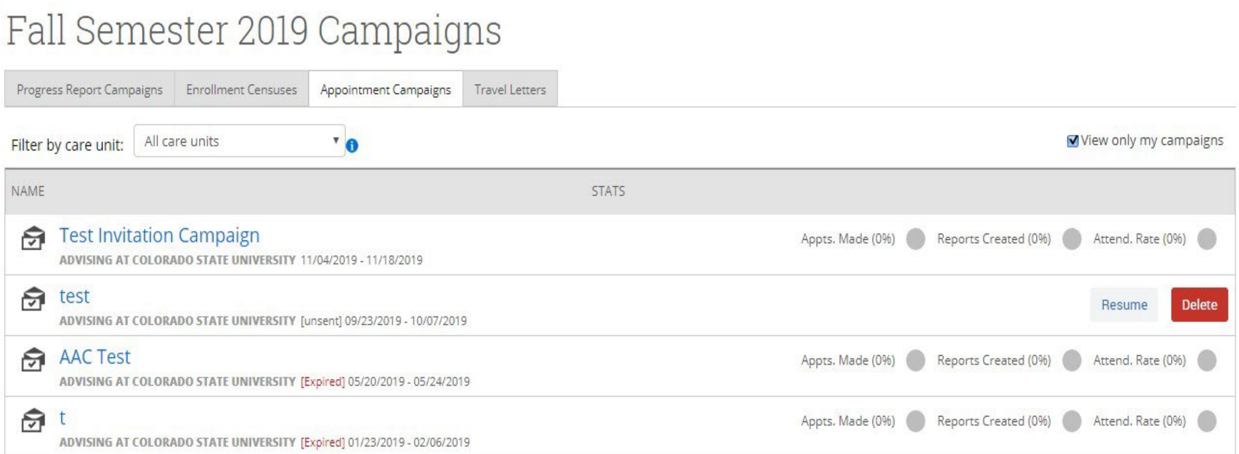
Lastly you can customize the message you wish to send. Only change the text in the green boxes then select continue.



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.



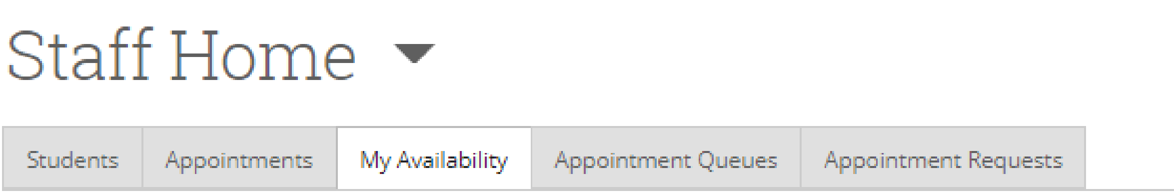
To verify the campaign was successful, select campaigns in the sidebar and appointment campaigns.



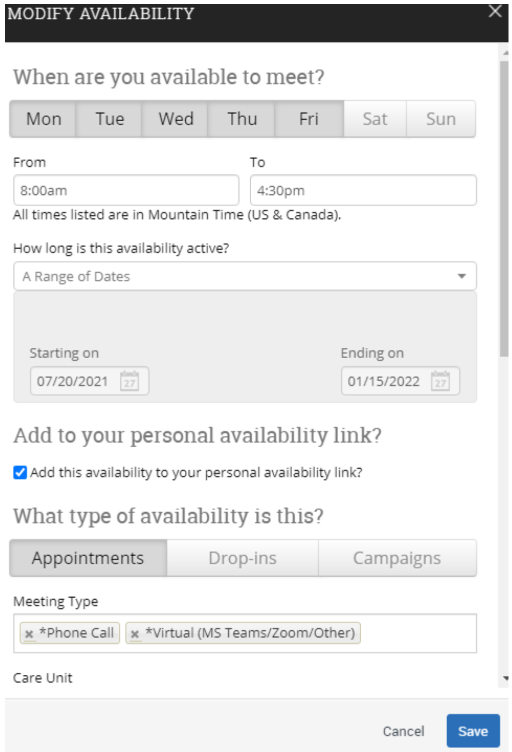
Adding Personal Availability Link (PAL) in Navigate

Personal Availability Links (PAL) are a useful tool for scheduling. Each PAL is unique to a staff member in Navigate. The link does not change over time. When you include a PAL in a URL field, website, email, or SMS and students click the link, they are taken to the “New Appointment page” in student scheduling.

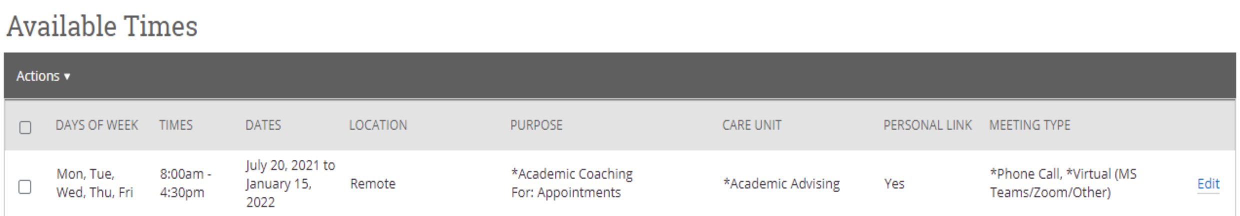
To setup your PAL, go to your staff home page in Navigate and click on “My Availability”



Add or modify availability preferences. Be sure you check the box that asks if you want to add to your personal availability link (select appointments).



Your new availability should show up along with your other ones. You should see it say "Yes" under "Personal Link."



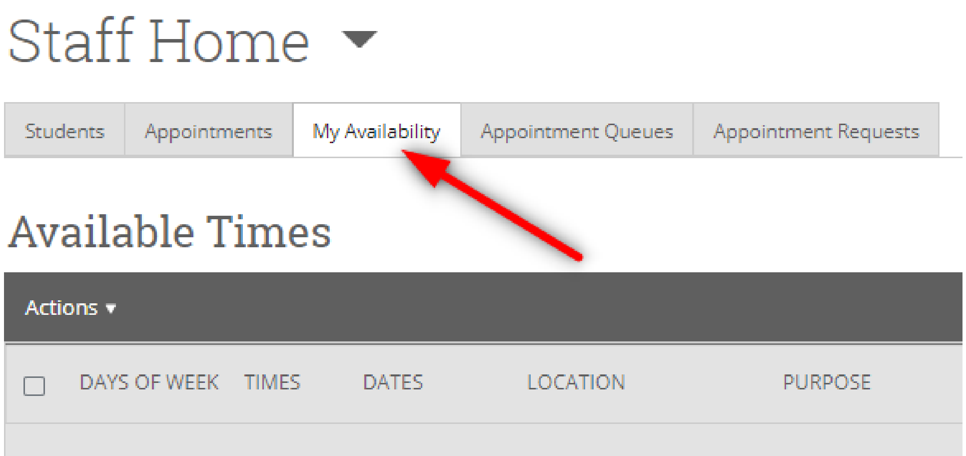
The staff user and their Care Units and Support Services are pre-selected for students. When scheduling, students will click PAL link, then see staff's available times. The student will only see the Care Unit, Services, and Locations and times the staff user has selected to be part of their PAL.

Staff can also just copy and paste your link if you go to your availability and, at the bottom of the page, click on the copy button listed next to your Personal Availability Link.

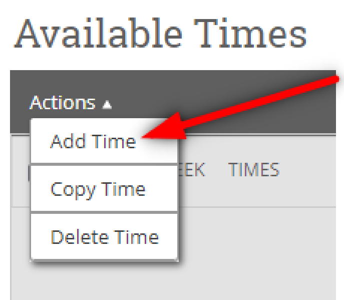
Meeting Types

Meeting Types ensure there is an option for students to indicate their preferred modality to meet with staff. They can be used in Availabilities and Student Scheduling. Staff can add Meeting Types to their Availabilities by following the following steps:

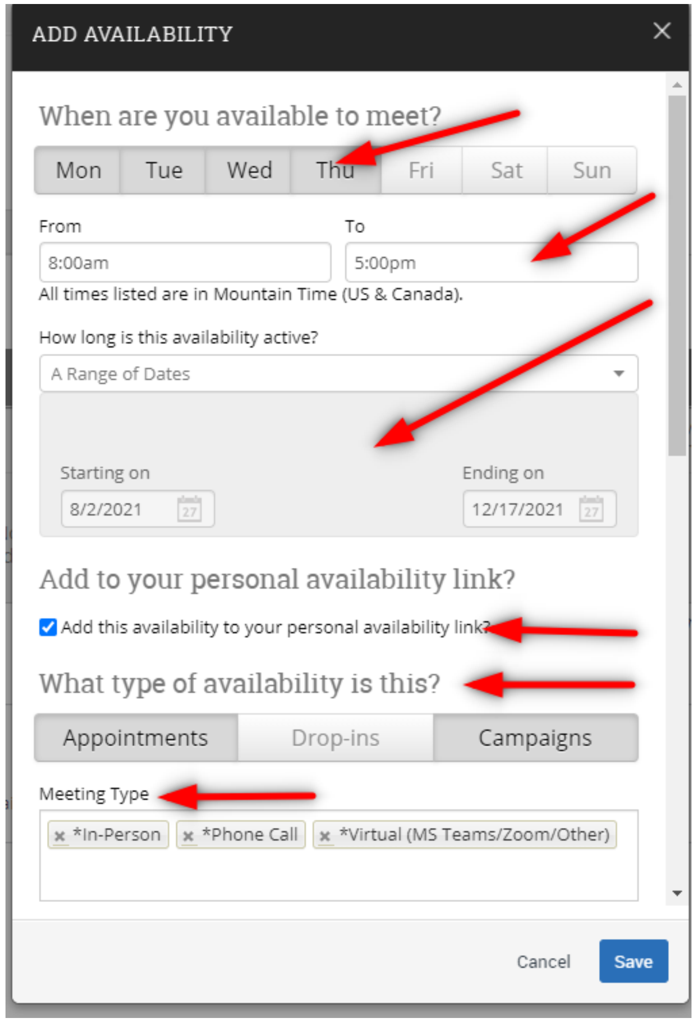
- Go to your Navigate Home Page (click the house icon)
- Click the "My Availability" tab button



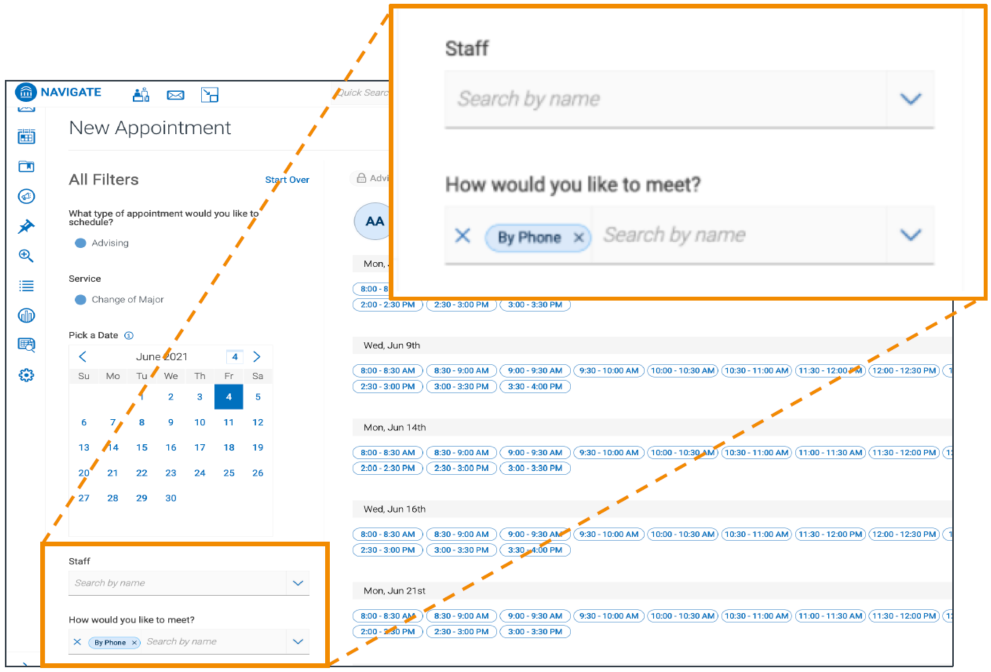
- Click "Actions" dropdown and "Add Time"



- Add your availability by completing the form (below)
  - Note: enter the days of the week, times, duration of availability, and type of availability (In-Person, Phone Call, or Virtual)
  - Click the "Add this availability to personal availability link" to schedule meetings with students using your PAL link.
  - You can enter your "URL/Phone Number in the cell so students have it.
    - How to find Personal meeting ID in Zoom
    - How to Copy join info to share your "Meet Now" link in Teams
  - If you are meeting "In-Person" add the building and room location in the "Special Instructions for Student" box (at the bottom of form)
  - To offer group advising, enter the max number of students per appointment (bottom of form)



- After you configure your meeting types, students will be able to select their meeting type in the scheduler (see example below)



Added an appointment filter within student scheduler that allows students to choose Meeting Types on the Available Times page

Navigate Frequently Asked Definitions

Advising Comments

- Notes - Comments about a student.
- Report on Advising - Comment about a student appointment, tied to appointment details.

List Types

- Saved Search - Dynamic List created using Advanced Search.
- Watch List - Static List created using Advanced Search, created from a Saved Search, created manually from the student profile, or uploaded via .csv file with student ID numbers.

Student Grouping

- Category- Automated student grouping pulled from Banner attributes. To add new categories, information must be in Banner, and IS will need to edit the script. Visible on student profile, searchable in Advanced Search.
- Tag- Manual student grouping by student ID number. To add a new tag, it should be requested from the Platform Administrator as a tag is centrally visible. Visible on student profile, searchable in Advanced Search.

Student Record

- Conversations- Where messaging in the platform is recorded on every user's profile, not synched with ARIESweb.

- History- Where notes and reports are recorded on the student profile, synched with ARIESweb.

Semester Codes*

Year + (10, 60, 90)

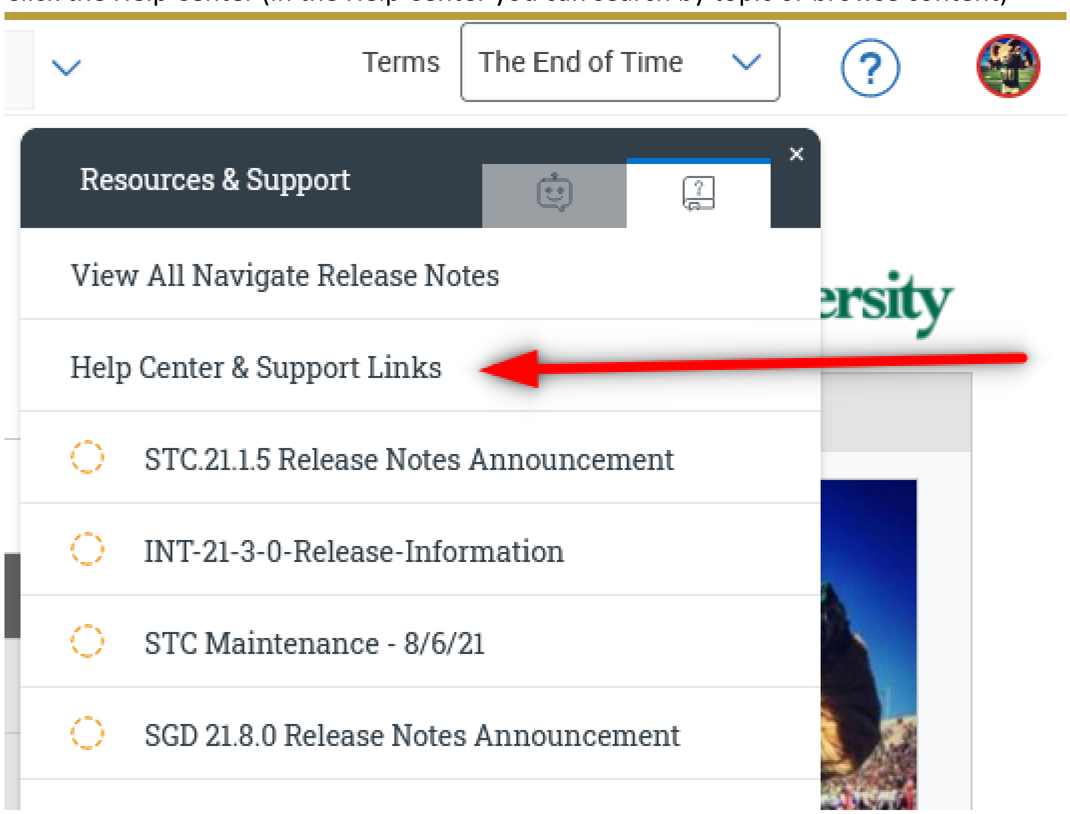
- 10 - Spring Term
- 60 - Summer Term
- 90 - Fall Term

*Helpful tip - Spring Term starts in January = 1st month of the year, Summer Term starts in June = 6th month of the year, and Fall Term starts in September (kind of) = 9th month of the year. For example, Spring Semester code for 2022 is "202210."

Troubleshooting

How to find Navigate Help Center

- Click the "?" button on your Navigate Home Page
- Click the "Help Center and Support Links" link (see below)
- Click the Help Center (in the Help Center you can search by topic or browse content)



Issue with Off-Campus access

Individuals should check their web browsers to ensure that JavaScript is enabled-- Java is the program within the browser that runs the lists/ boxes on the Navigate website. Click the link below on how to enable Java in your web browser:
https://java.com/en/download/help/enable_browser.html

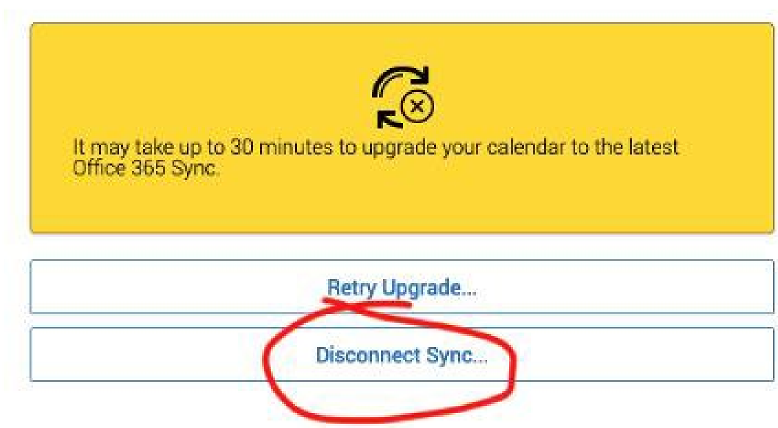
What to do if your calendar is not syncing

If you are using EAB Navigate, and haven't disconnected and reconnected your account yet, you should probably do that so it will sync properly because of Duo Two-Factor Authentication on June 1, 2021. Resuming sync doesn't work, you need to fully disconnect and reconnect. If you have further questions about Duo, please see https://www.acns.colostate.edu/duo/

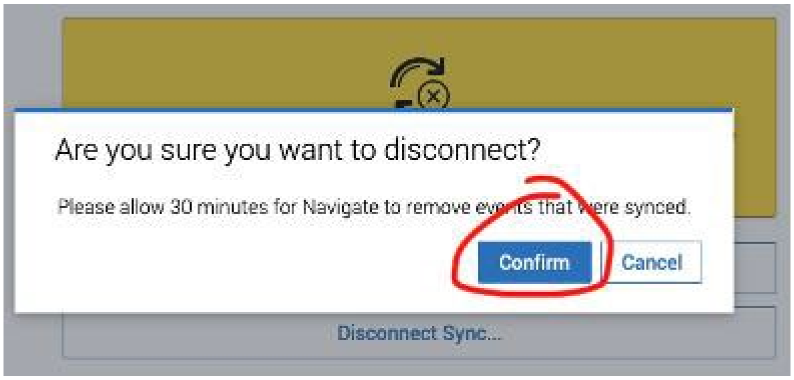
Here is how to disconnect your calendar sync in Navigate:

1. Click on your calendar in Navigate
2. Click "Settings and Sync" button

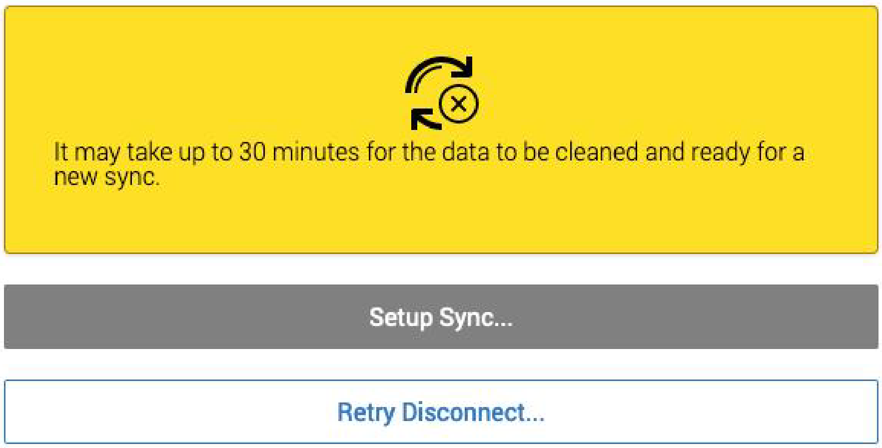
3. Click "Disconnect Sync"



4. Click "Confirm" to disconnect (note, it may take Navigate 30 minutes to remove events that were synced).



5. Wait at least 30 minutes for the data to be cleaned and ready for a new sync before clicking the "Setup Sync" button.



Manage Advisor Assignments in ARIESweb

Advisor assignments are managed in ARIESweb. Follow the process below to assign and manage assignments, as necessary.

For all options above, the first step is to log into ARIESweb with your e-id and password: https://ariesweb.colostate.edu/sites/ariesweb.search/home.aspx

Mass Assignments:

In ARIESweb, you can create "Mass Assignments" where you assign students in bulk to an advisor, you can "Mass Delete" where you remove students in bulk from an advisor, or you can assign students individually to an advisor, and manage an advisor's advisee list by removing students that are no longer enrolled.

Step 1 - Scroll down to the bottom of the list and under the "**Staff Tools**" section, there is an option for "**Mass Advisor Assignments**" – select that link.

⊟ **Staff Tools**

- Admissions Reports
- Advising Codes
- ARIESweb Users
- Batch Transcripts
- Class Lists or Override Lists
- Current Class List by College, Department, Section
- Class Schedule Draft
    - Check Classroom Availability
- Course Restrictions
- Department-Specific Data
- Mass Advisor Assignments
- Sections With Missing Grades
- Transfer Credit
- General Fee Tool

Step 2 -If you already have the list of students that you wish to assign, skip to step 3 below. Otherwise, you will need to find the list of students in your department that have not yet been assigned to an advisor. To run the report of students that need an assignment, simply click on the appropriate link. A screen shot below shows the links to run these reports. You may need to run both reports to ensure that you have captured all students in your department that need to be assigned.

Already have your list of students to assign or unassign to a single advisor?

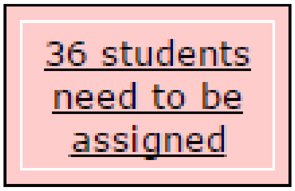
1. Paste a list of CSU_IDs. One per line - just select a column in excel, copy, and paste to the following page!
2. Unassign a list of CSU_IDs. One per line - just select a column in excel, copy, and paste to the following page!

Need to create a list?

These are the priority students to assign:

- Currently Enrolled undergraduate students, whose *primary* major is advised by your department, but don't have an advisor from your department.
- Currently Enrolled undergraduate students, whose *primary* major is advised by your department, but PRIMARY advisor is not in your department.
- Undergraduate applicants who have confirmed Intent to Enroll, whose *application* major is advised by your department, but don't have an advisor from your department.

OR



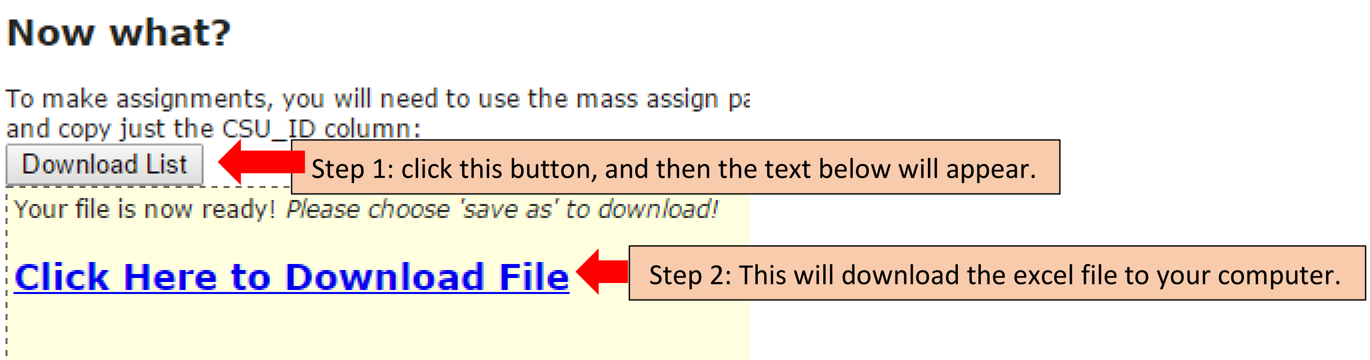
You can easily see the number of students to assign by looking at the pink rectangle in the upper right-hand corner of the screen: (see image on left)

After you click on one of the links above (indicated by the red arrows), you will be taken to a screen that shows you how many students are in that category.

*Note that both the pink rectangle and the Currently Enrolled link include the same students, they are simply different ways to get the list.

Download the list to view, sort, and edit,
To download: Click on the "**# STUDENTS FOUND. Continue…"** link.

This will take you to a screen that shows you the students, or you can click a button to create an MS Excel file with the information that you need. This is the recommended method, so that you can easily sort and filter based on common information (such as prior assignments, comment makers, etc.…). You can use this information to determine who the appropriate advisor in your department is, and that is who the student should be assigned to.



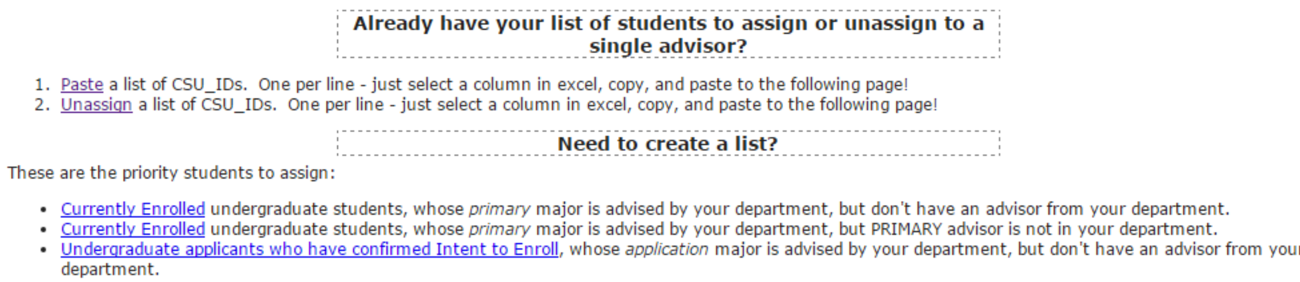
General Guidelines for using prior information are (and the list should be followed in this order):
If Primary Advisor field is filled out and is an advisor from your department, remove them from the list (there should not be any, but sometimes they may appear on the list due to the lag time between the reports and real time in ARIESweb).

If the Primary Advisor field is filled out, and is an advisor from another department, but the date is within the last month, then DO NOT reassign this student to your department. This means the student has changed majors and is awaiting assignment in their new department. Once the student is assigned in the new department, they will be removed from your "to be assigned" list.
If last comment by an advisor is in your department, then assign them to that advisor.

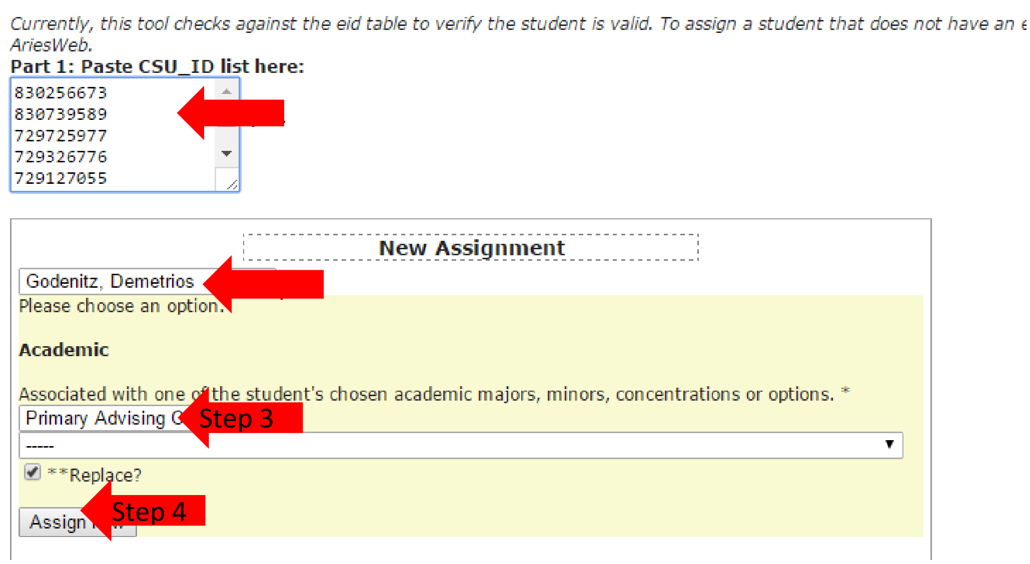
If no recent comment, look for a previous advisor. If there is an advisor from your department listed, assign them to that advisor (the most recent assignment if there is more than one).
If none of the above, assign at random based on fair distribution amongst your advisors.

Once you have the list organized and know which students you want to assign to which advisor, you are ready to move onto step 3 below.

Step 1 - If you are starting over in ARIESweb again, navigate back to the screen below, using the information from Step 1 (above):



Now you are ready to paste the list of CSU IDs that will be assigned to an advisor. Choose the "Paste" link above. You will be taken to a screen where you can paste in only the CSU IDs of those students that you want to assign to one specific advisor. Your screen should look like this:



Following the steps on the arrows listed in the graphic above:

Step 1: Paste the CSU IDs that will be assigned to an advisor in the empty text box, under Part 1: Paste CSU_ID list here. You can copy and paste these from a different document or type them in individually.

Step 2: Choose the advisor that you want to assign the group of students to from the drop-down list. All students whose IDs are entered in the text box from step 1, will be assigned to this advisor.

Step 3: Ensure to click the "Replace" checkbox, so that your assignment will replace any other Primary Advisor on record. Even if a student does not have a primary advisor on record, you should still click the replace option in case any other students in the list do have a primary advisor listed, either from your department or another department.

Step 4: Once you are satisfied with steps 1 through 3 above, click on the "Assign Now" button and you will receive a confirmation for all CSU IDs that have been assigned, and will be notified if any assignments were not successful, so be sure to read the following message carefully.

* It is recommended that you save a copy of your change list for your records, so that you can "Mass Delete" the same group of students in case of an error, or mass assign these students to another advisor in case of an error.

Assign an Individual Student

From the ARIESweb home page - https://ariesweb.colostate.edu/sites/ariesweb.search/home.aspx , search for the student you wish to assign by their CSU_ID, or by their First and Last Name, or their e-mail address in the box in the upper right hand corner of your screen:

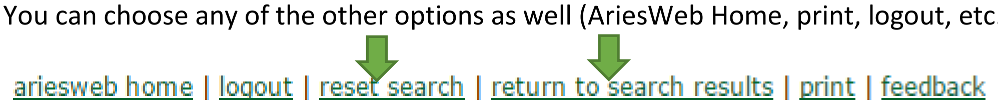
After you click the "Search" button, you will be taken to either of the following two screens:

- The student's ARIESweb page, containing all the information specific to that student or:
- A list of students that match your search criteria, from which, you will need to select the correct student. You will then be taken to that student's AriesWeb page.

Once you on the student's AriesWeb page, you can verify that you have the correct student by looking at the top of your screen for their identifying information (Name, CSU_ID, Gender, Race, DOB, etc.).

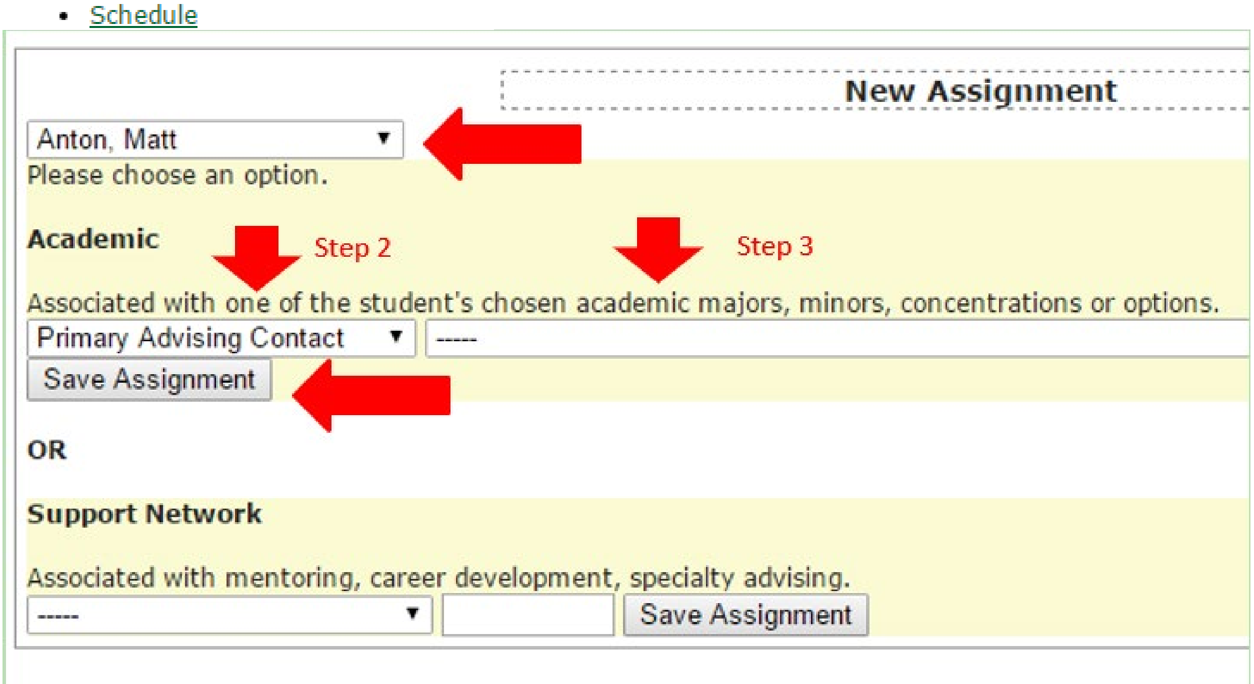
- If you have chosen the wrong student from your search results, click on the "Return to Search Results" link at the very top of your screen to select a different student that matched your search criteria.
- If you have entered in the wrong student CSU_ID, and/or you just want to search for a different student, click on "Reset Search" link at the very top of your screen.

You can choose any of the other options as well (AriesWeb Home, print, logout, etc.)



When you are confident that you have the correct student to assign pulled up in AriesWeb, scroll towards the bottom of the screen to the Advisor Student Tools section, and select the link for "Advisor Assignments"

To create a new Primary Advising Contact or Academic Advising Contact assignment go to the New Assignment section and fill out the top portion, indicated by the red arrows below.



Step 1) Choose the advisor the student will be assigned to
Step 2) Choose the type of advisor/contact that the assignment should be (Primary or Academic)
Step 3) Select the major that this assignment will correspond with. The student most likely only has one or two majors listed, so pick the one that is associated with your department
Step 4) Click the "Save Assignment" button

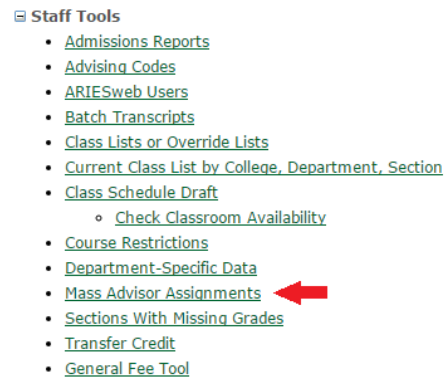
Assigning Support Network

To create a new assignment associated with the Support Network for the student, follow the same screen above, but only complete Step 1 to choose the advisor, and then complete the fields below the "Support Network" option and click the "Save Assignment" button in the Support Network section.

*Note: Be patient while the system processes the assignment. If you close the screen or navigate away from the page while the assignment is still processing, then the assignment may not be completed, and the student will still be unassigned.

Unassign Student(s)

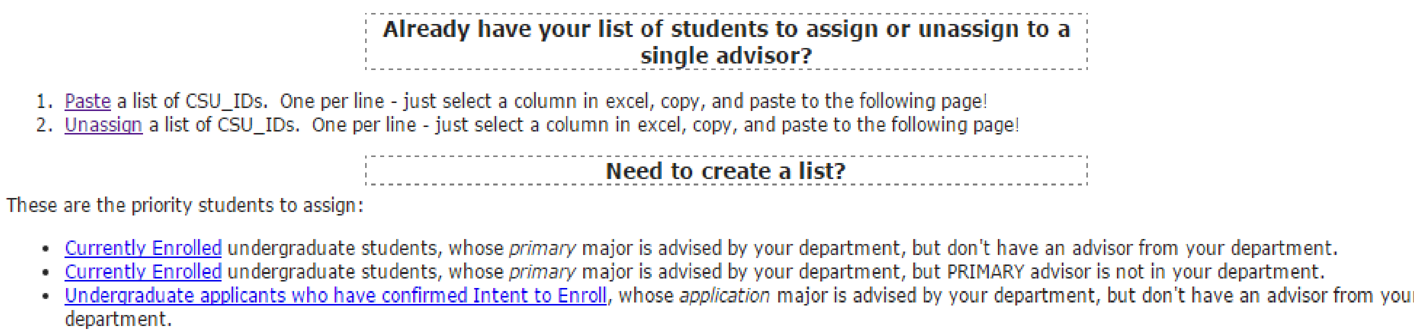
Mass Unassign

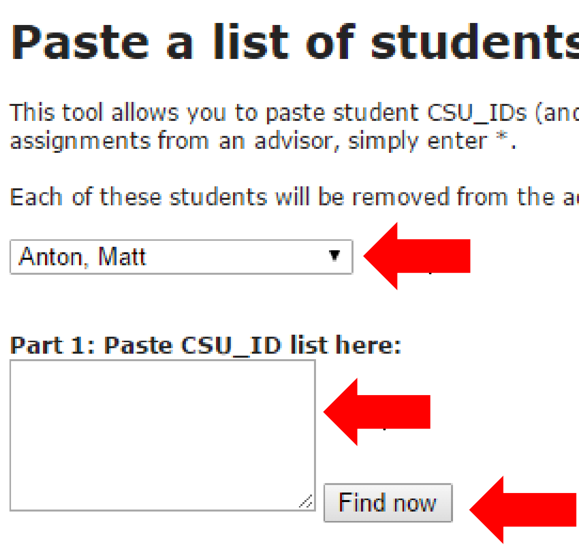


Step 1 -SCROLL down to the bottom of the list and under the "**Staff Tools**" section, there is an option for "**Mass Advisor Assignments**" – select that link.

Step 2 - Click the link to "Unassign" a list of CSU_IDs, indicated by the red arrow below.

Step 3 -Select the Advisor you want to Remove students from, and then paste the CSU IDs for all students that should be removed from the selected advisor. Then click the "Find Now" button, and those students will be removed.





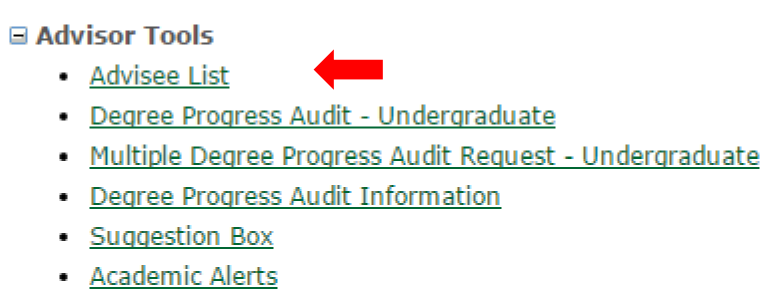
You **DO NOT** receive a confirmation before the students are removed from the advisor, so it is important that you double check your list prior to clicking the Find Now button.

*It is recommended that you save a copy of your student list for your records so that you can "Mass Assign" these students to another advisor using the instructions for "Mass Assignments".

Removing Students on Advisor Lists

To help manage the advisor's list and keep the list accurate, you may need to remove students that are no longer enrolled at CSU from their lists. To do so, follow the steps below:

Start at the AriesWeb home page: https://ariesweb.colostate.edu/sites/ariesweb.search/home.aspx
Step 1 - Select the "Advisee List" link under the "Advisor Tools" section:

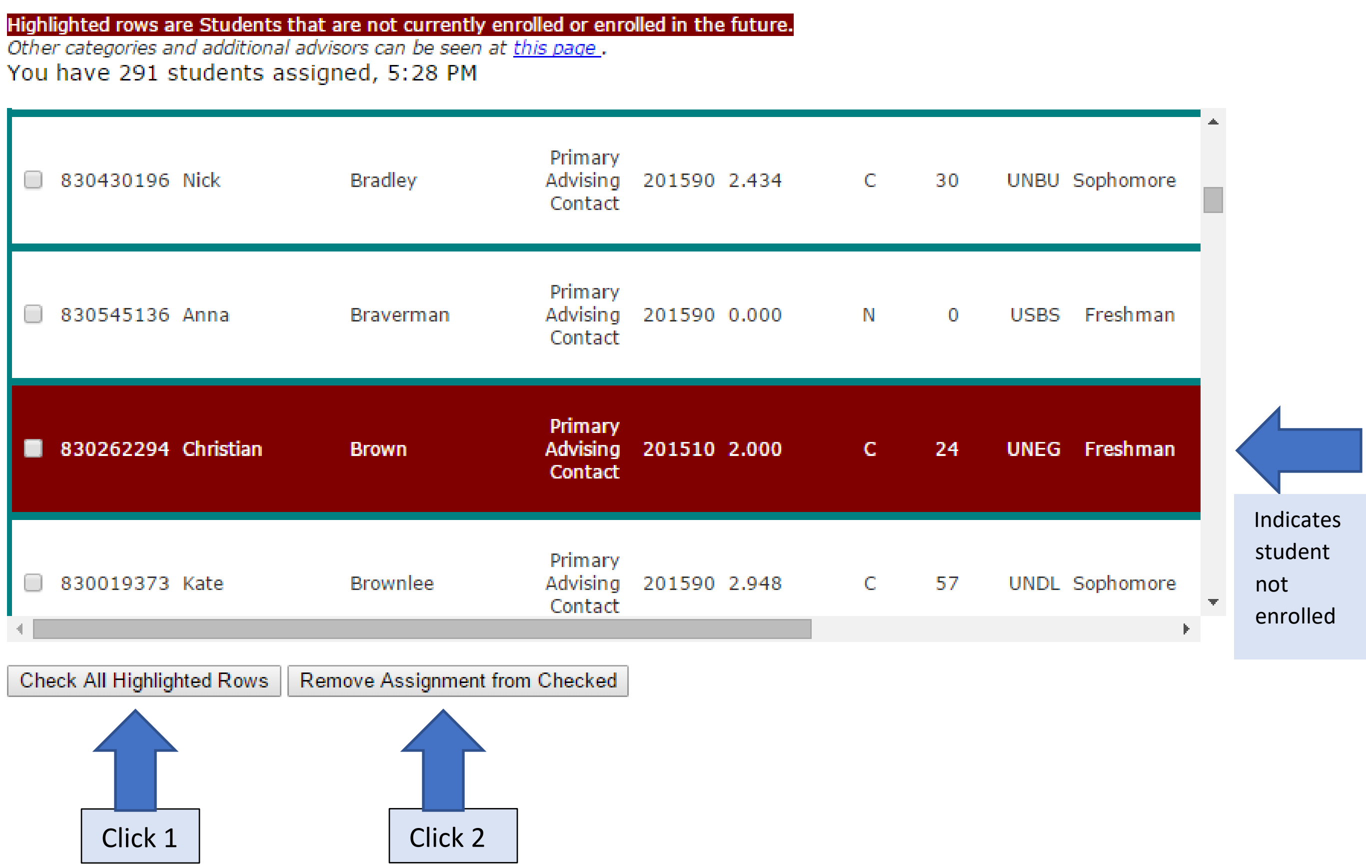


Step 2 - Select the advisor whose list you want to edit from the drop-down list and click the "Switch/Show Advisor's List button.

The advisor's list of advisees will load below. Students that are no longer enrolled at CSU will be highlighted in red as shown in the example below.

Step 3 - You can select all the highlighted rows, by clicking the button "Check all highlighted rows". (See Click 1 in the diagram below.) This will put a check mark next to all students that are highlighted in red. You can go through and manually select or de-select students by putting or removing a check mark in the box. Typically, you can remove all these students in bulk since they are no longer enrolled.

Step 4 - After you have the students that you want to remove "checked" you can click the button to "Remove Assignment from Checked". This will delete the student from the advisor's list. (See Click 2 in the diagram below.)



After you have removed students from the advisor's list, it is recommended that you re-run each advisor's list so that you can get an accurate count of students that is currently assigned to them (Step 2 above). That way, it will help keep fair numbers amongst your advisors.

Advisors and departments are responsible for maintaining the lists of each individual advisor,

Support Resources

For assistance or a support request, submit a help ticket through either of these options:

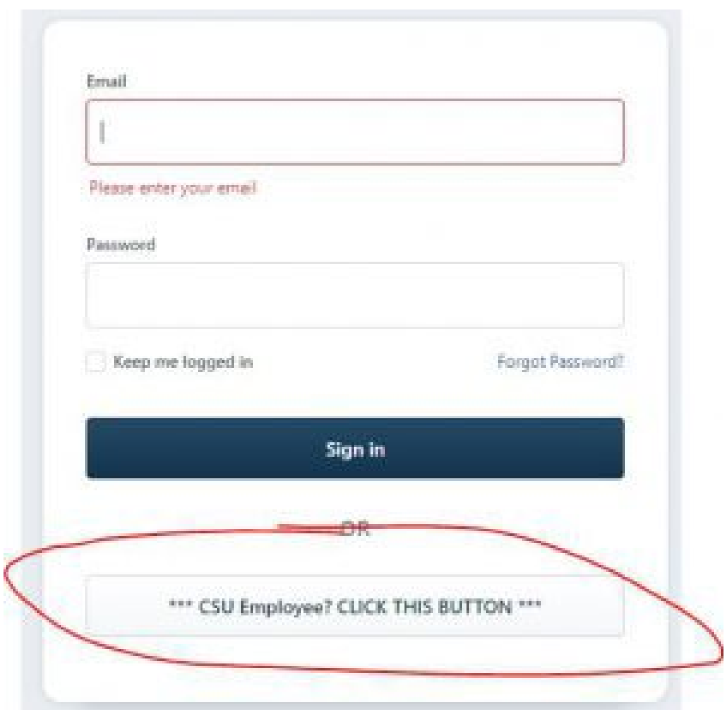
- Submit a support request through the Advising at CSU website or https://advising.colostate.edu/submit-support-request/

Navigate Training Self Help Resources:

- Navigate How-To web page or https://advising.colostate.edu/navigate-training/
- Frequently Asked Questions or https://advising.colostate.edu/frequently-asked-questions/

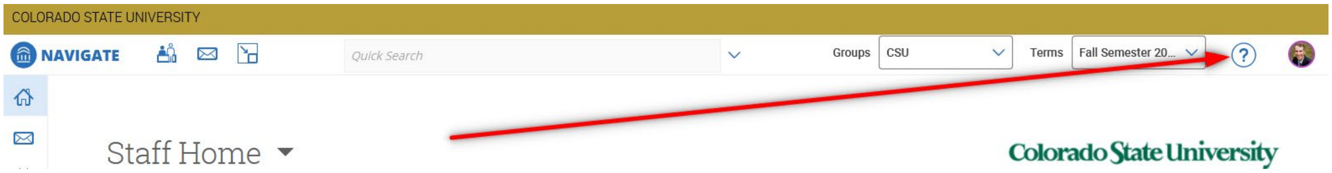
Gain Access to Advising Tools:

- To gain Access to (ARIESweb, MS TEAMS Advising Network, Advising Listserv, and Navigate), visit the Advisor Onboarding page. To login to the form, make sure you click the "CSU Employee? CLICK THIS BUTTON" button (see image below).



Submit Requests or Enhancement Ideas to Navigate

- Click the "?" button on your Navigate home page to access.



- Click the “Idea Portal” link in the “Help Center & Support Links” page of Navigate to submit your enhancement ideas, comment on others, and vote for ideas. The Idea Portal will be monitored by the Navigate Product Management team, and they will provide updates on the top voted ideas.