# Navigate Quick Start Guide

## GETTING STARTED – calendaring, availability, scheduler, notes, summaries, advanced search

1. Log in to Navigate using your SSO credentials! Once logged in, links below will take you directly to the Help Center with How-to steps, videos, and best practices.

**PRODUCTION SITE URL: https://csurams.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** - 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 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.
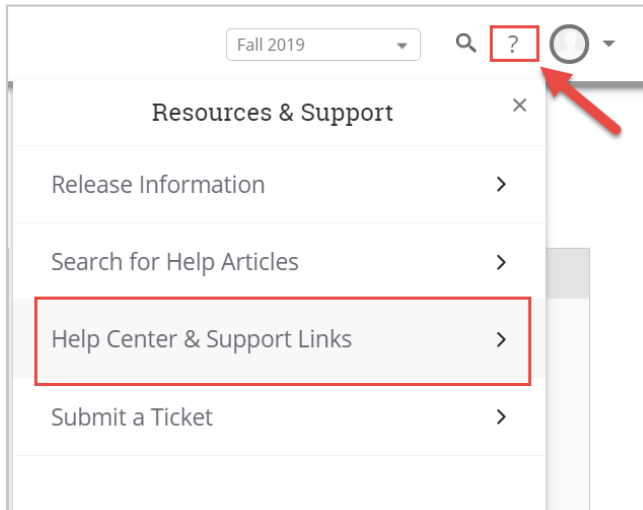


**Accessing the Help Center -**

**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!
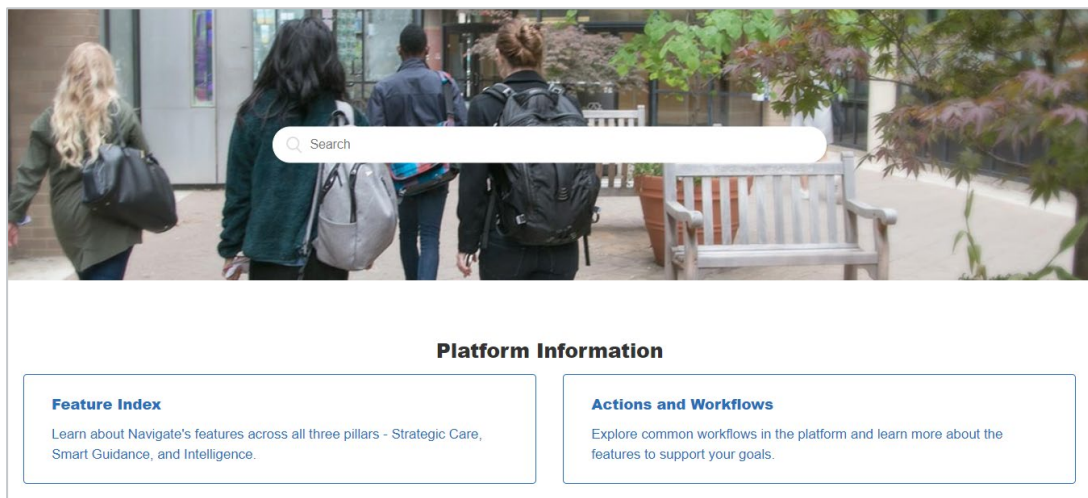


**Tip:**
Links to feature-specific articles in the Help Center are found at the bottom of each page of this document (look for this icon)

**For more detailed guidance, check out the Help Center!**

# Additional Questions?  Submit a request for support!

# Benefits of Features of Navigate:

| Workflow | Advisor<br>*Academic Advisors (Advising Center), Success Coaches* | Staff Partner Areas<br>*E.g., Student Affairs, Registrar's Office, Tutoring, Career Centers, Institutional Research* | Faculty Advisors, Admins, and Staff | Faculty and Instructors |
|---|---|---|---|---|
| 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)<br>- Drop-ins: Student Profile -> Report on Appointment<br>- Campaigns: Upcoming Appointments tab | - Add advising summary report after each appointment (e.g., Learning Center, Pastoral Care forms)<br>- 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)<br>- Create Searches and Student Lists to contact students from Advanced Search | - Email and text students (see communication policy examples)<br>- Create Searches and Student Lists to contact students from Advanced Search | - Email and text students (see communication policy examples)<br>- *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)<br>- Appointment Campaign guidelines (Phase II) | - Phase II (for discussion) | - Phase II | - Phase II |

# 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 ⓘ

| Actions ▾ | | | | | | |
|---|---|---|---|---|---|---|
| SELECT | DAYS OF WEEK | TIMES | DATES | LOCATION | PURPOSE | CARE UNIT |
| ○ | 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_ ≔ ≟ ↶ ↷

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:** 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

**URL / Phone Number**

**Special Instructions for Student**

| **B** | *I* | :≡ | ≡ | ↩ | ↪ |

e.g. room 23, please bring paper

Will you be meeting with multiple students?

*These settings will not be used for kiosk and campaign purposes.*

**Max Number of Students per Appointment**

`1`

Cancel    **Save**

**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)

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**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.
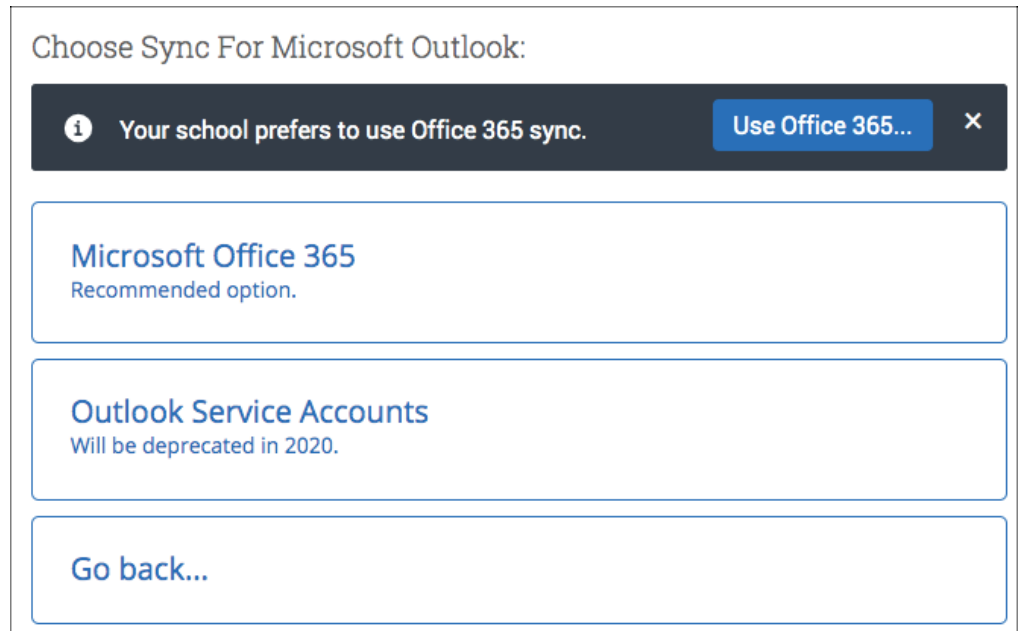
# Appendix B: Sync Your Outlook Calendar

## 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.

**Select Office 365**

Choose Sync For Microsoft Outlook:

ℹ️ Your school prefers to use Office 365 sync.    [ Use Office 365… ]  ✕

Microsoft Office 365
Recommended option.

Outlook Service Accounts
Will be deprecated in 2020.

Go back…

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.

Microsoft Office 365:
eab_st_o365_2@eabdev.onmicrosoft.com

🔄

Retry Sync…

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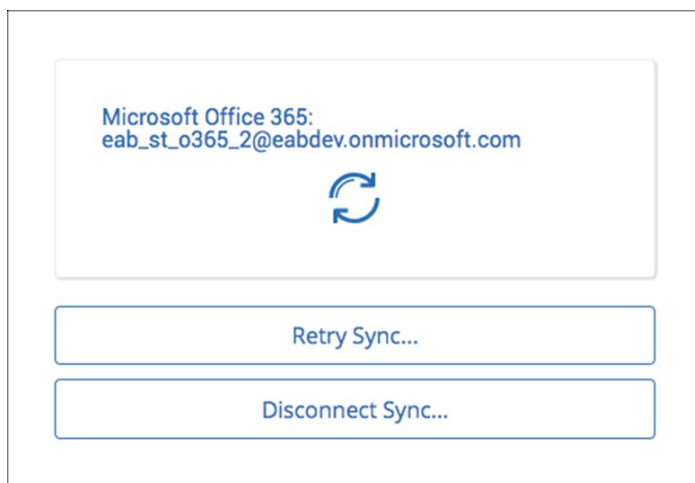
The browser will return to the Calendar Integrations page. The "Exchange Integration" tab will no longer appear. The "Office365 Integration" tab will now show the timestamp for the last successful sync (or any applicable error message) and will include options for you to Retry or Disconnect the sync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

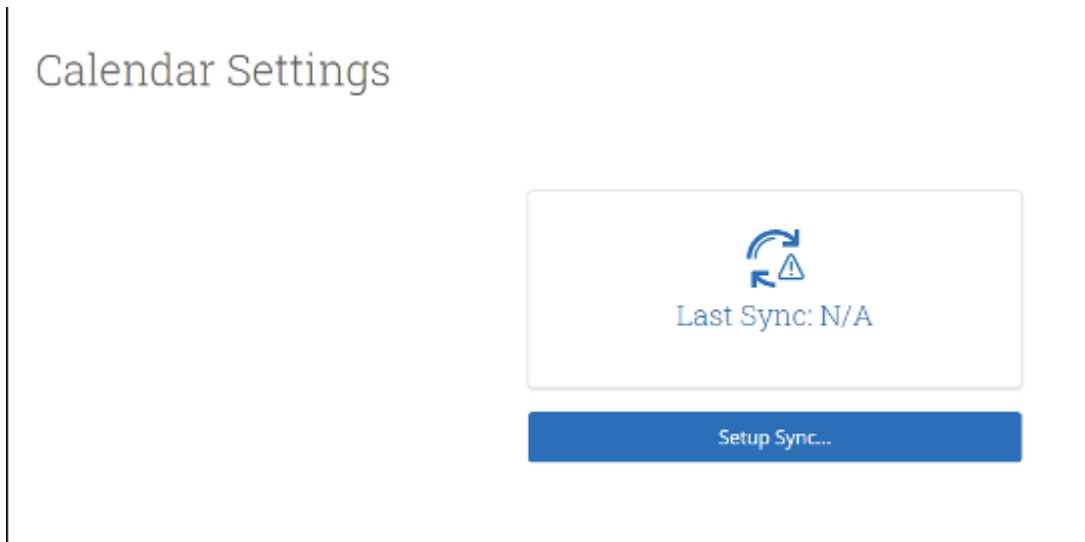# Appendix B: Sync Your Outlook Calendar - continued

## 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.

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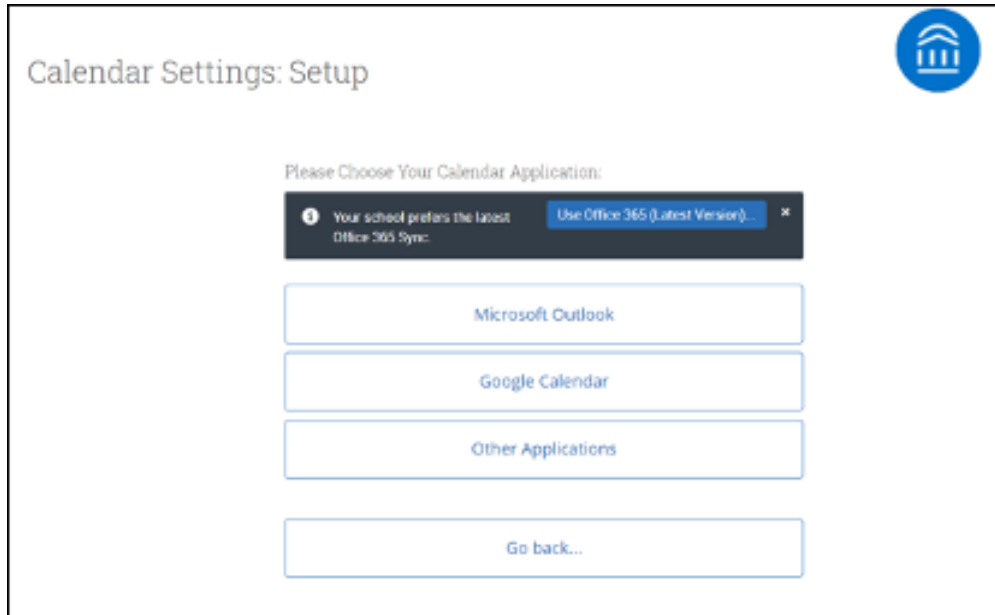


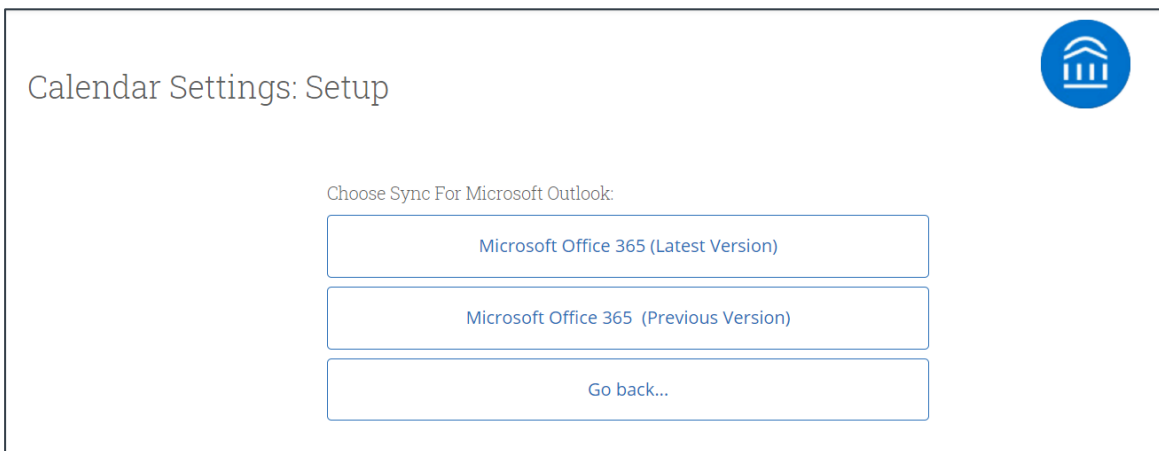On the Calendar Settings page, select **Setup Sync...**

# Appendix C: Sync and Integrate 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.
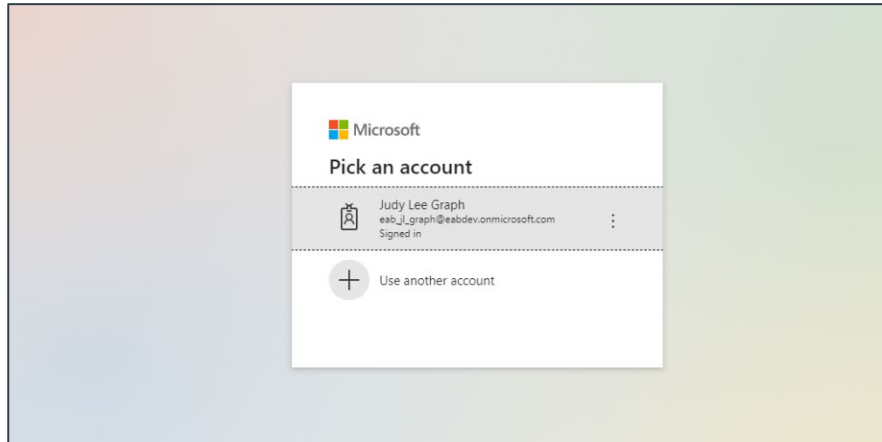


If you click **Microsoft Outlook** instead of the **Use Office365 (Latest Version)** button, you choose your Microsoft Outlook sync. Select **Microsoft Office 365 (Latest Version)** from the options.
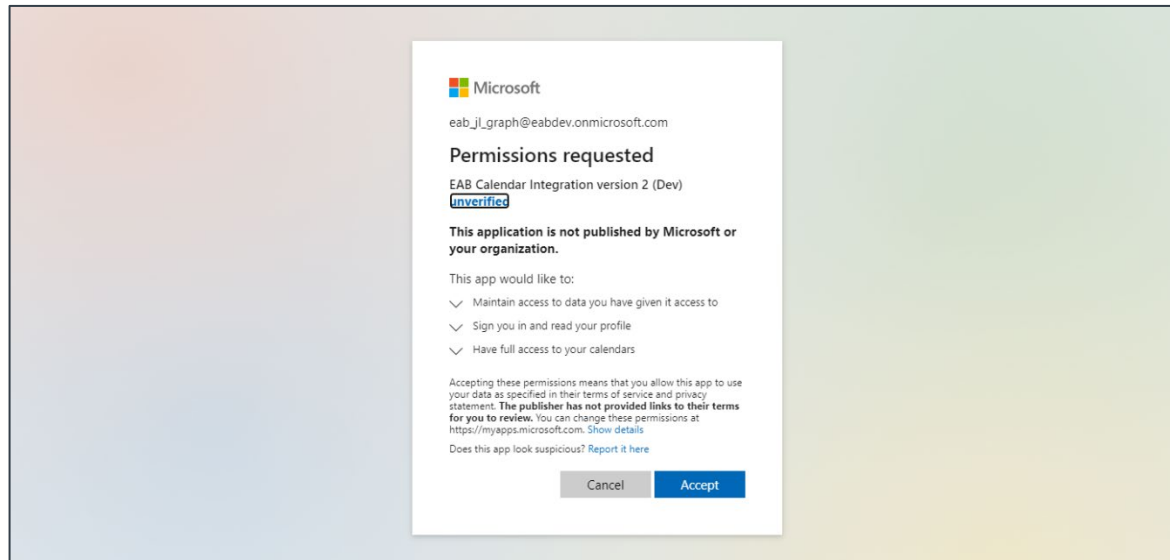


Regardless of which method you choose, the Microsoft login and authorization page opens. The page tells you to pick an account. Choose your professional account.
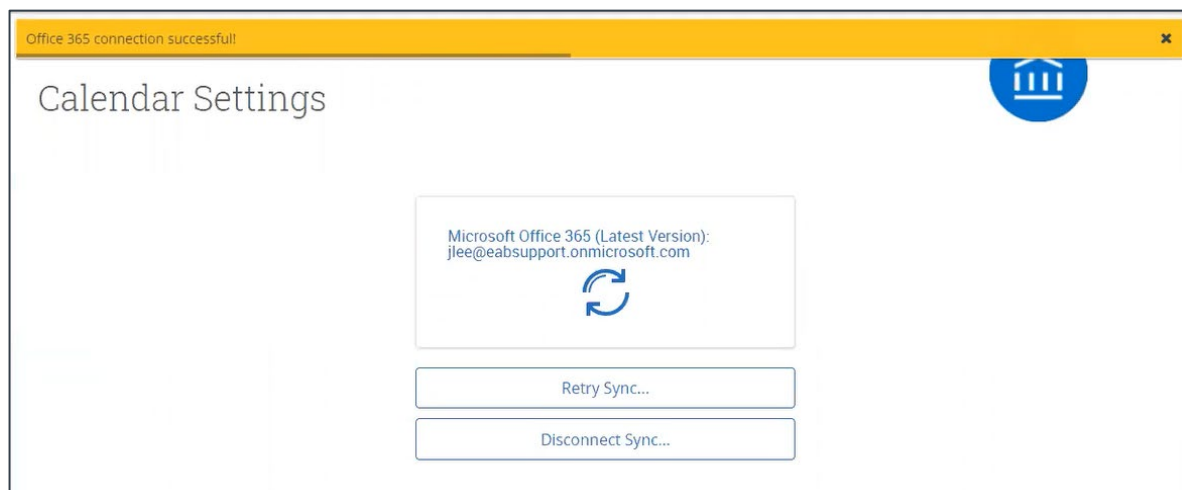
## Integrating Your Calendar



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.

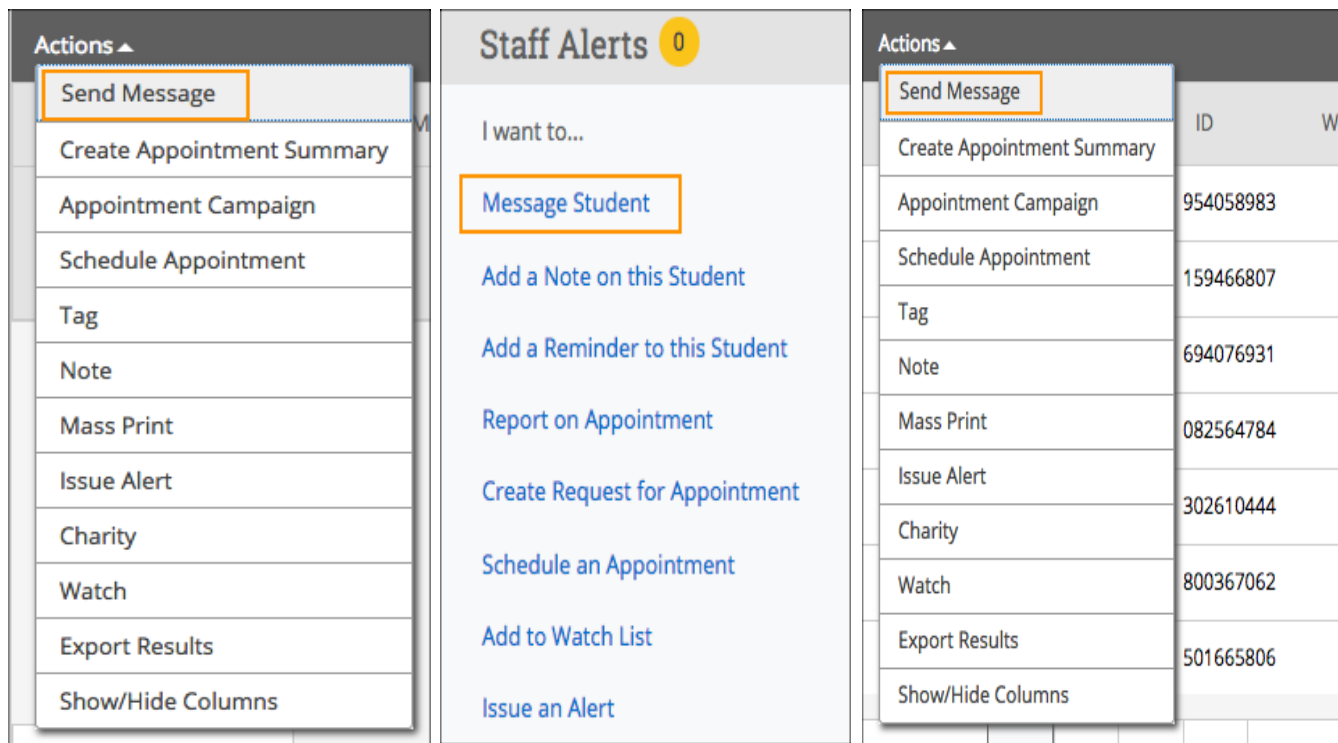# Appendix D: Mass Email and Text a Group of Students

## Communicating with Students

Navigate provides both **email** and **text messaging** for faculty and staff to communicate with students, either individually or in mass. 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)

| Actions ▲ | Staff Alerts 0 | Actions ▲ | | |
|---|---|---|---|---|
| Send Message | | Send Message | ID | W |
| Create Appointment Summary | I want to... | Create Appointment Summary | | |
| Appointment Campaign | Message Student | Appointment Campaign | 954058983 | |
| Schedule Appointment | Add a Note on this Student | Schedule Appointment | 159466807 | |
| Tag | | Tag | | |
| Note | Add a Reminder to this Student | Note | 694076931 | |
| Mass Print | Report on Appointment | Mass Print | 082564784 | |
| Issue Alert | Create Request for Appointment | Issue Alert | 302610444 | |
| Charity | | Charity | | |
| Watch | Schedule an Appointment | Watch | 800367062 | |
| Export Results | Add to Watch List | Export Results | 501665806 | |
| Show/Hide Columns | Issue an Alert | Show/Hide Columns | | |

**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 E: 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.
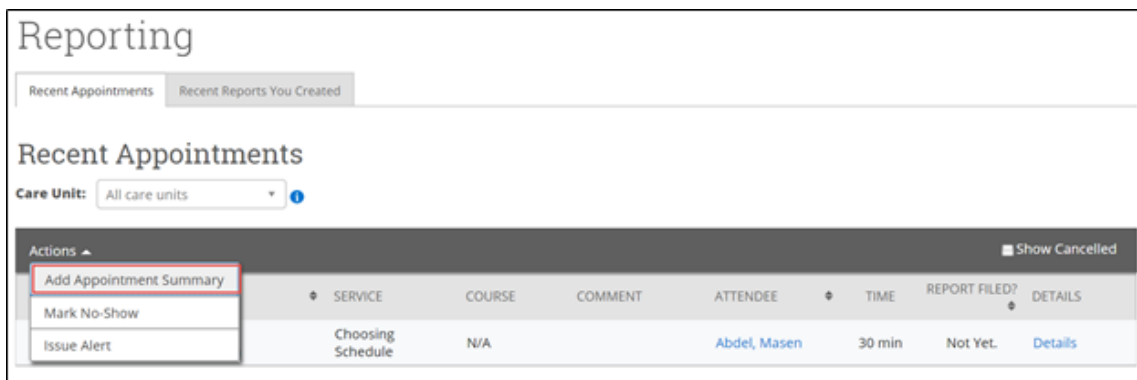


**For Drop-in Appointments**: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report 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.
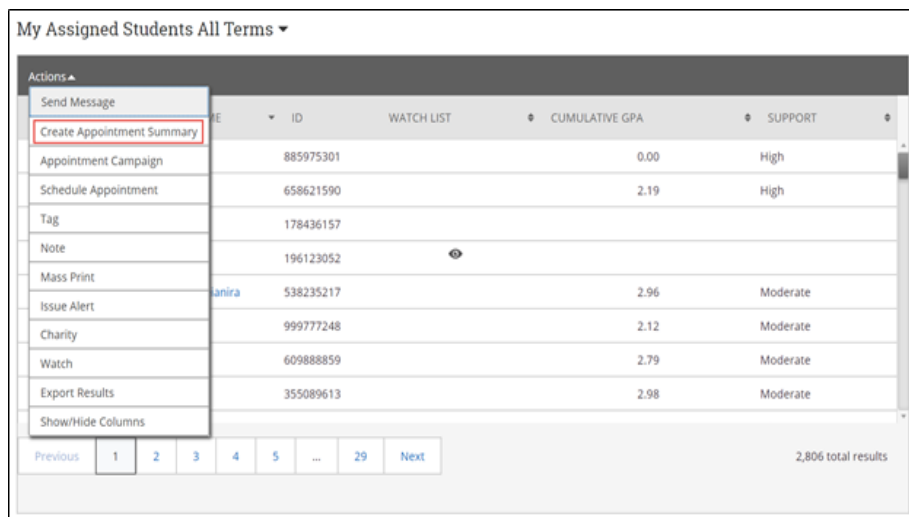


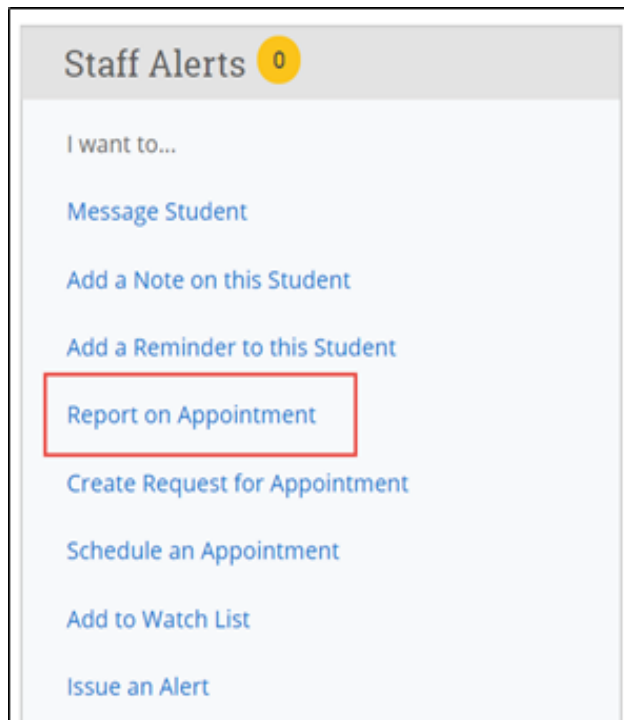**For more detailed guidance, check out the Help Center!**

# Appendix F: 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.

**Staff Alerts** 0

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

**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 G: 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:**

- o  Name your campaign (Students will not see the name of the campaign)
- o  Select "Advising" as the Care Unit (or the applicable Care Unit for your campaign)
- o  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).
- o  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".
- o  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".
- o  Appointment Limit- how many appointments can the student schedule for the campaign?  (default is 1)
- o  Appointment Length- how long do you want the appointment to last?
- o  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 ▾ | |
|---|---|
| ☐ | NAME |
| ☐ | Ellert, Channah |
| ☐ | Malis, Philbert |
| ☐ | 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:**

- o  Create a Subject Line for your email
- o  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 H: Advanced Search Tool

**How to use Advanced Search Tool (PDF)**

**For more detailed guidance, check out the Help Center!**

# Support Resources

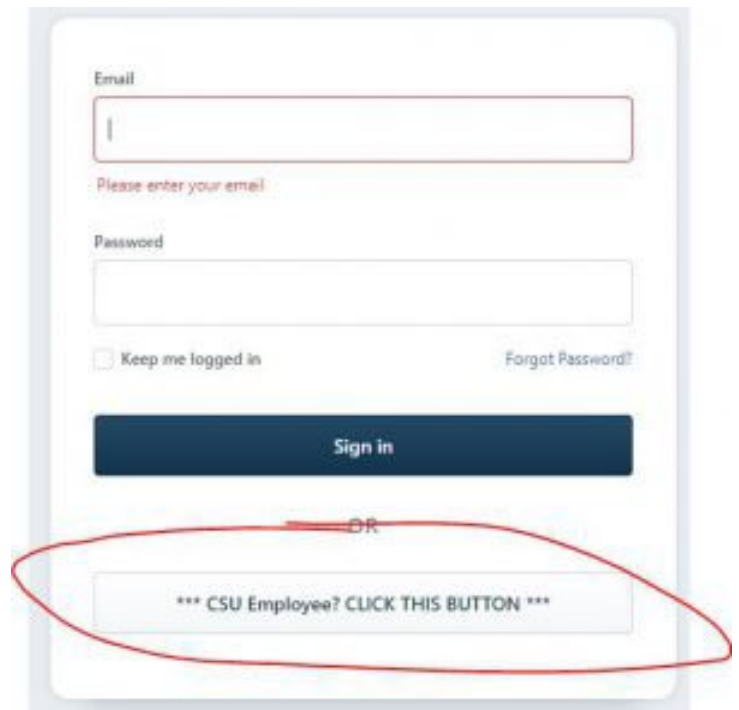**For assistance or a support request, submit a help ticket:**

- 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 select the "CSU Employee? CLICK THIS BUTTON" button

eab.com

## Submit Requests or Enhancement Ideas to Navigate

Visit 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.