Quick Start Guide for Navigate

GETTING STARTED

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

https://winthrop.campus.eab.com/

Note: There is also a training version of the site available for users who need to test/practice the site's more advanced functions: https://winthrop.campus-training3.eab.com/ Please note that the data and settings in the training version of the site are not updated automatically, so please contact navigate@winthrop.edu if you think you need to use the training site so that the technical team can manually check the relevant settings first.

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.

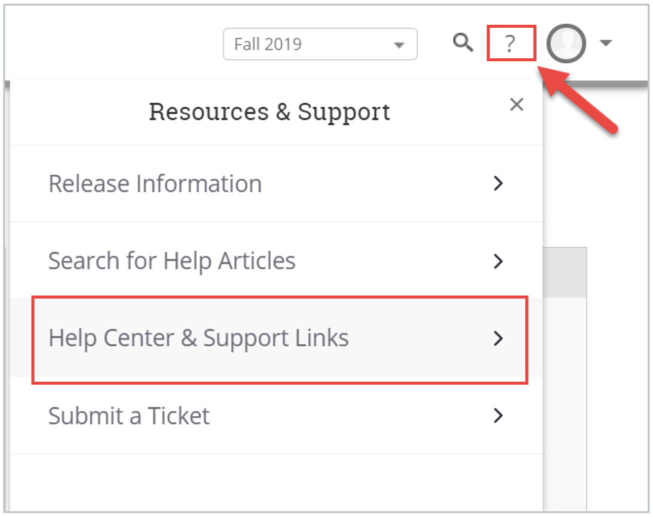
KEY PLATFORM FEATURES

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. Your ability to see student profile information will depend on your specific role in the system and relationship to the student.
- **Email or Text One or More Students –** Use 'Send a Message' from the 'Actions' drop-down to contact your advisees, students enrolled in your class, or students on 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 (a record associated with an appointment) or a Note (a general record not associated with a specific meeting) – see *Appendix D*
- **Create a Progress Report or Issue an Alert** to initiate interventions and identify at-risk students. Other users will respond based on the type of Alert issued. – see *Appendix E*
- **Create an Appointment Campaign -** Use this to invite students set up an appointment during times you have designated, such as for advising registration. – 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.



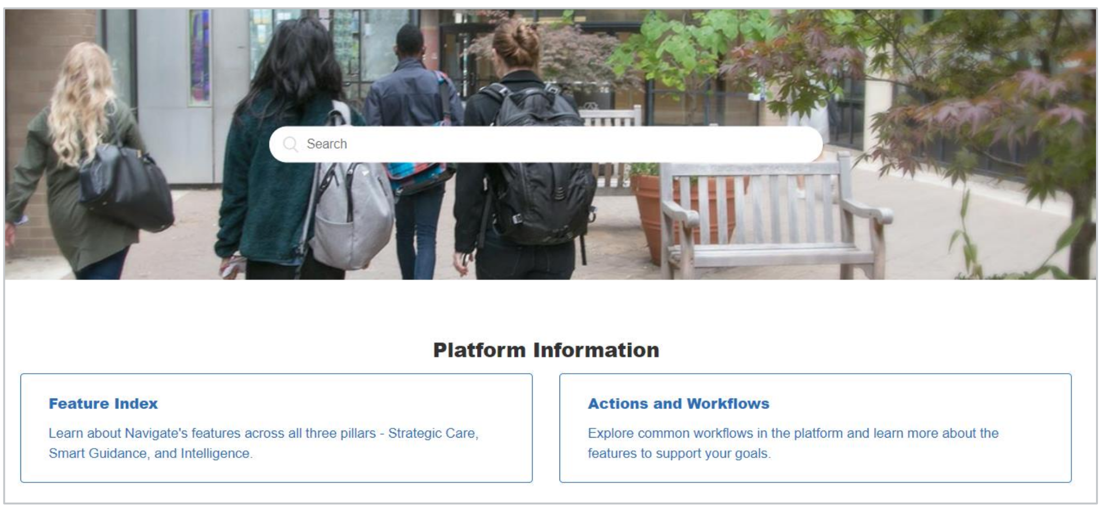
Accessing the Help Center -

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? Email navigate@winthrop.edu for support!

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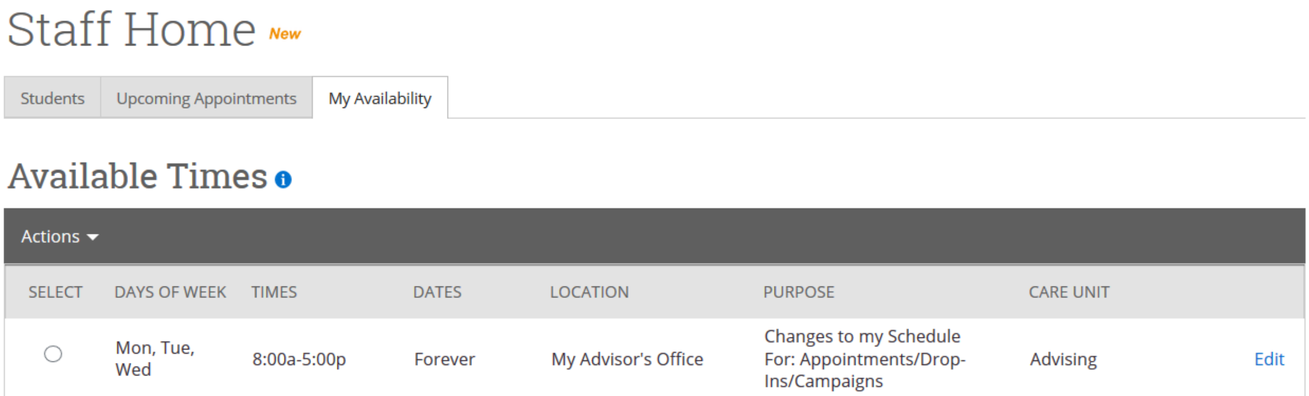
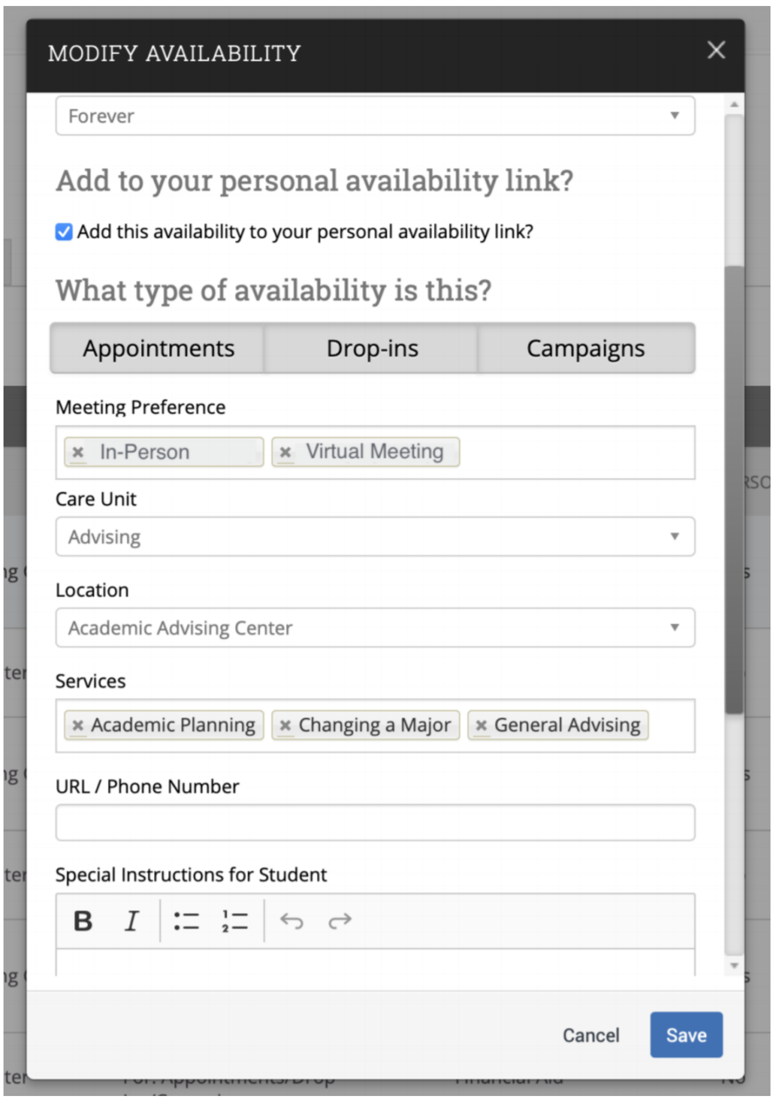
Appendix A: Setting Up Your Availability

Availability

As a new user, the first thing you need to do is *set up your availability* so that students can schedule appointments to see you. It is important to note that the locations and services available are created by institution administrators.





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, toggle that checkbox on. You can put your personal availability link in an email or text or on a website. Students who click on it are taken to a scheduling workflow that has the your chosen availabilities pre-filled. (**Note**: the link only works for regular Appointments, not for Drop-ins or 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 or modalities.

Step 7: For Care Unit, select the appropriate unit from the dropdown list. You can set up different availability times for different Care Unit roles (such as for academic advising appointments or for instructional office hours).

Step 8: Choose the location where your role is housed. This refers to the college or administrative office you work in, not necessarily your specific physical location.

Step 9: Select services you can provide students during this availability. You must choose at least one service but can pick more. *(continued on next page)*

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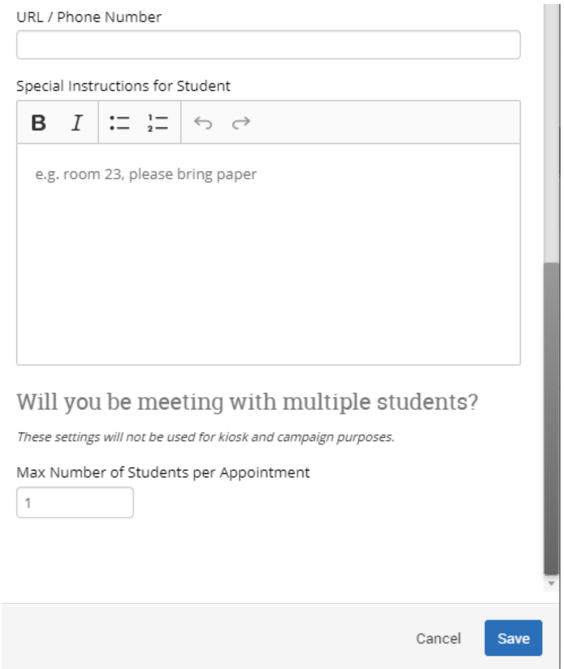
Appendix A: Setting Up Your Availability



Step 10: In the *URL / Phone Number* field, add your meeting link for your appointments (if virtual).

Step 11: Use the *Special Instructions* box to include additional details for students. *(For example: "We will use Zoom for our meeting, which you can access by using the link provided." or "My office is located on the third floor of Kinard Hall, in room 381.")*

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) or Care Units (if you have multiple roles at the university, or multiple office locations)

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!

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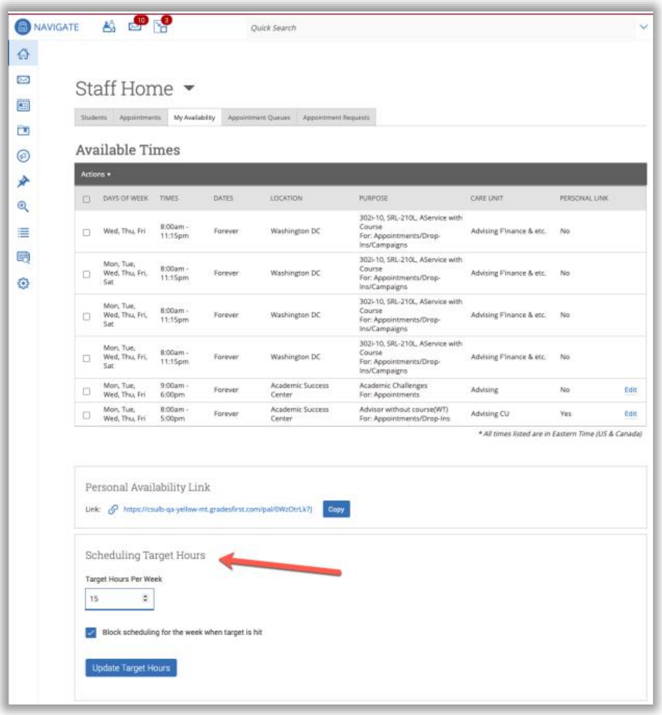
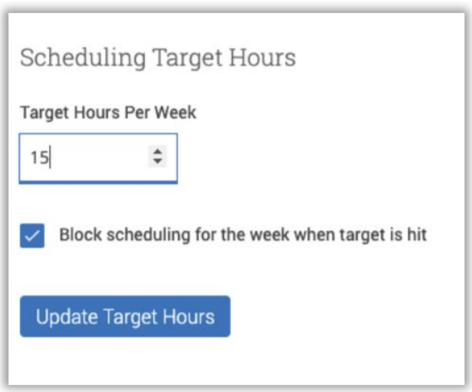
Appendix A: Setting Up Your Availability & Target Hours



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.



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PLEASE ONLY SYNC YOUR CALENDAR IN THE PRODUCTION SITE

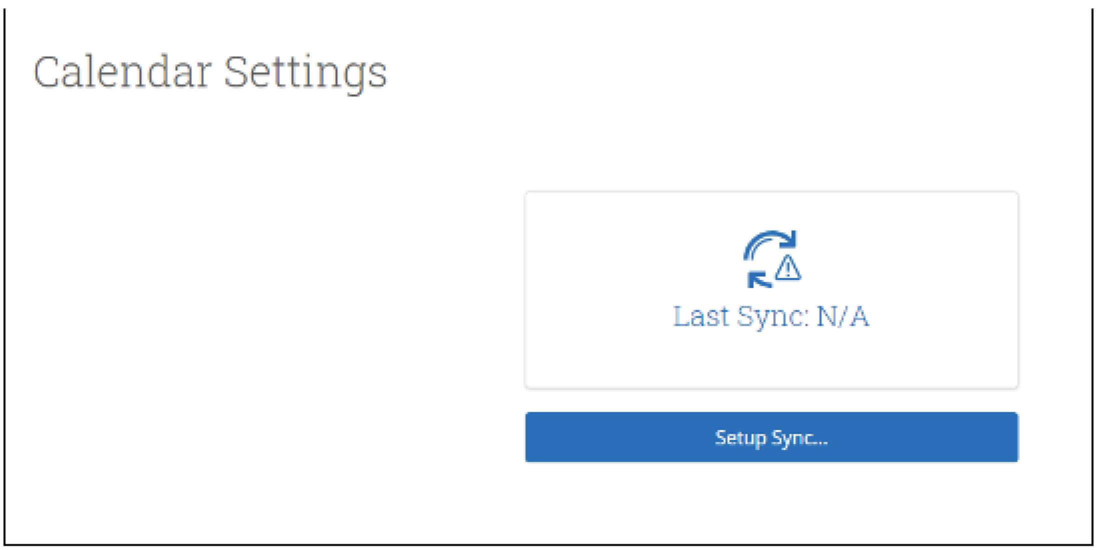
Appendix B: Sync Your Outlook Calendar

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. *Note: If you want to block your Outlook calendar during your office hours or hours you have set aside for potential advising appointments, be sure to mark the Outlook meeting as "Free" in the "Show As" menu. If the item is marked as "Busy" or any of the other options, Navigate will not allow students to schedule during that time.*

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

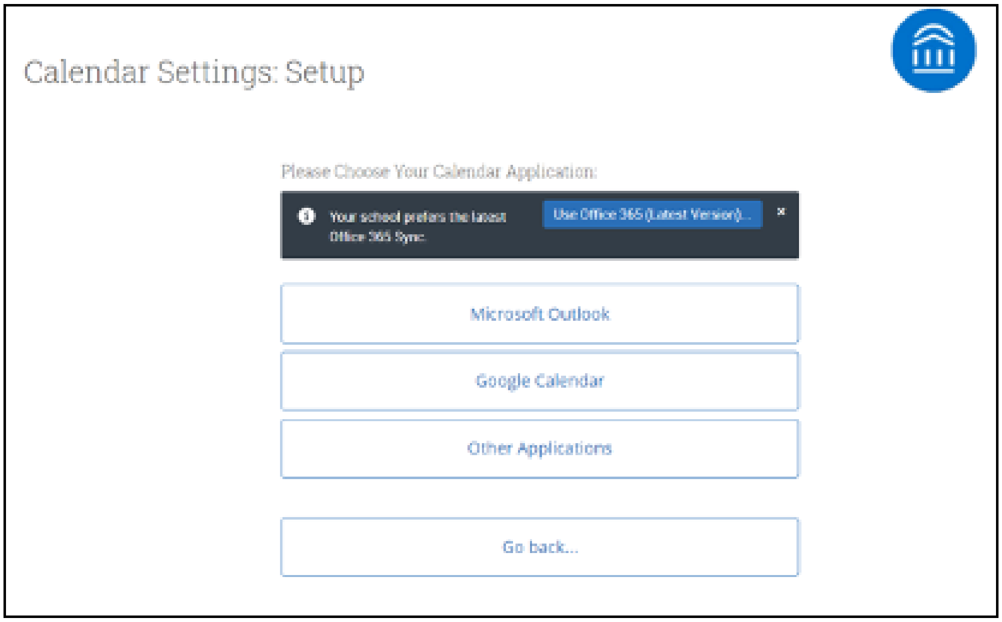
On the Calendar Settings page, select **Setup Sync…**



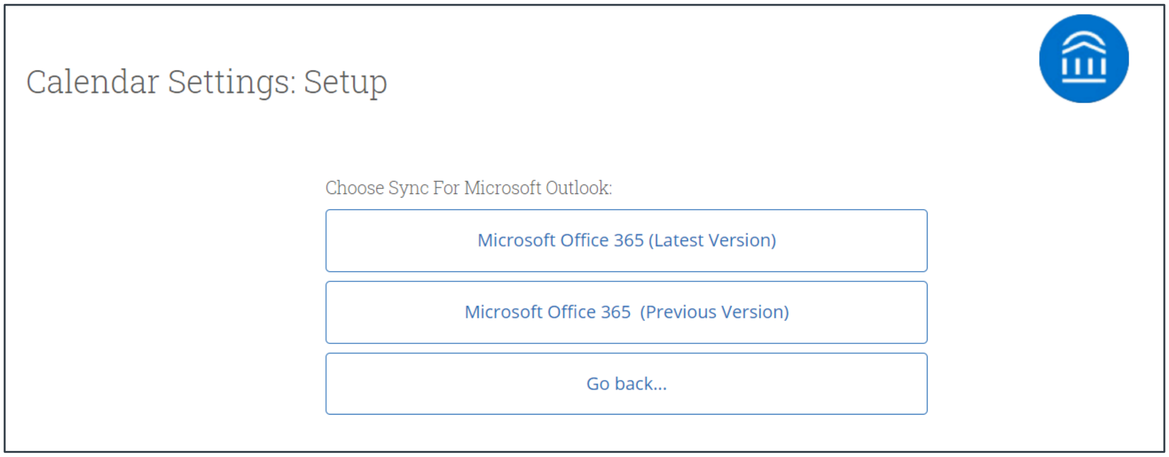
Appendix B: Sync Your Outlook Calendar

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.

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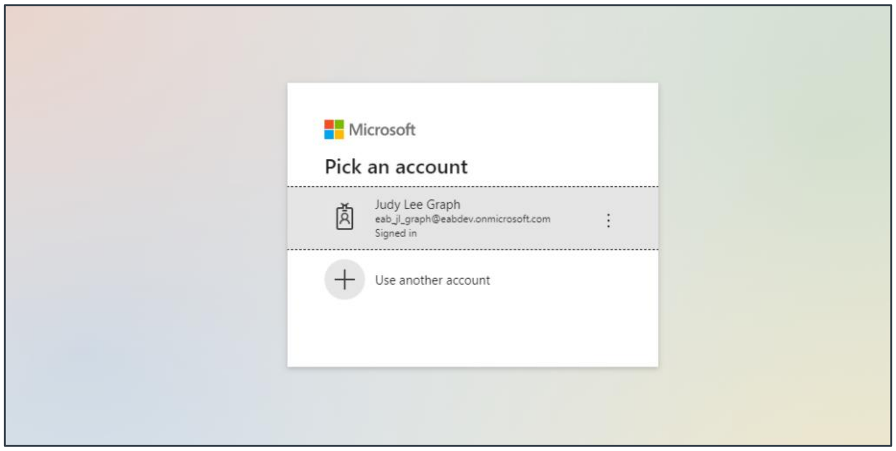
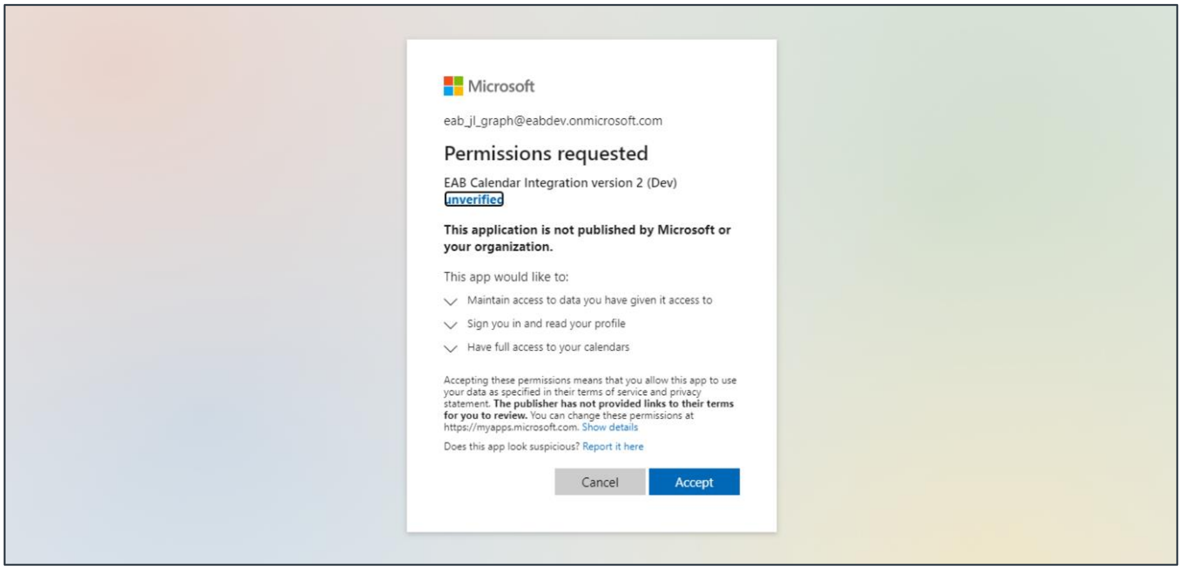
Appendix B: Sync Your Outlook Calendar

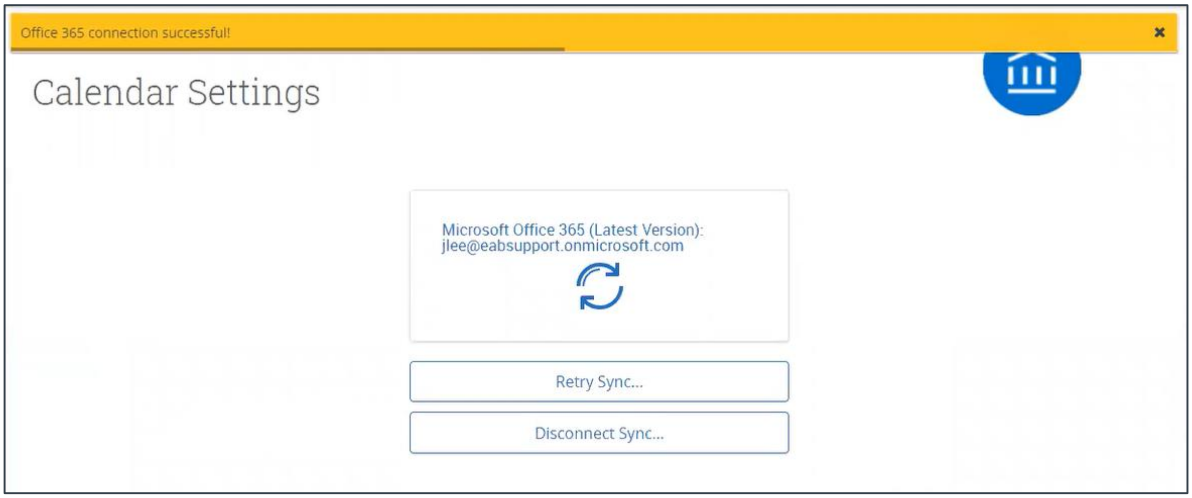
Integrating Your Calendar



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.



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Appendix C: Mass Email and Text a Group of Students

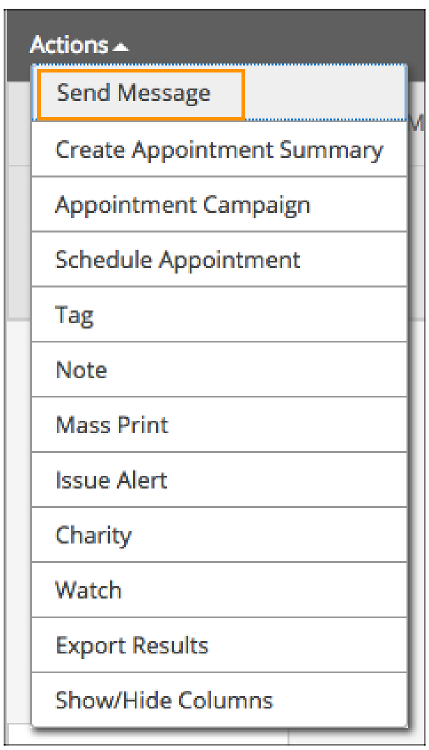
Communicating with Students

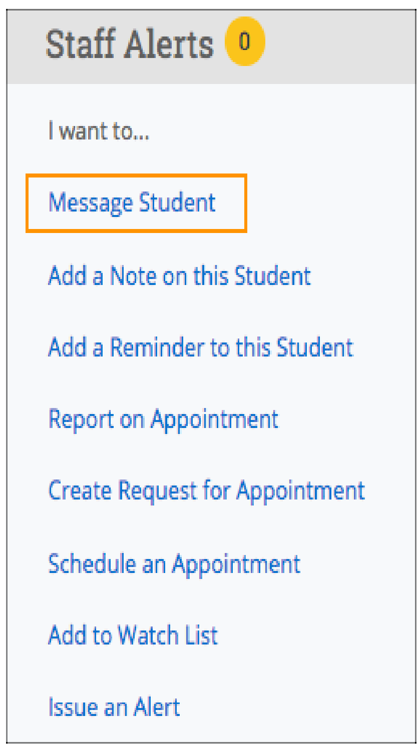
Navigate provides both **email and text messaging** for faculty and staff to communicate with students, either individually or en masse. Communicating with students through the platform creates records of those communication which may be accessible by other staff or faculty on your campus, depending on their permissions level. In addition, user permissions will limit which students an individual user can contact. (For example, instructors can only contact students in their classes, and advisors can only contact their assigned advisees.)

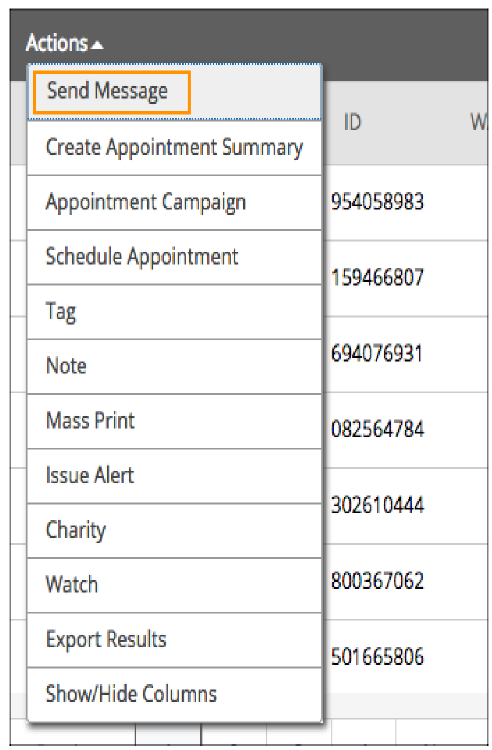
If a text message is sent to a student who does not have a phone number available to receive texts, the message will be delivered to their email address instead. If a student responds to your text, their reply will be delivered to your email address. Text messages come from a generic number and do not automatically identify the individual faculty/staff sender, so remember to identify yourself within the text if the context doesn't otherwise identify you.

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 Profile page (fig. 2)
- Send a message from the Advanced Search (fig. 3)







Note: If you do not see the option to Email or Text students, then your role does not have permission to perform this action. Please contact your Application Administrator (navigate@winthrop.edu) with questions.

Note: Do not overuse the Text function. This should only be used for time-sensitive communications that can't reasonably be sent via email, such as a last-minute appointment or class cancellation. Regular class reminders and announcements should still be sent via email or Blackboard.

For more detailed guidance, check out the Help Center!

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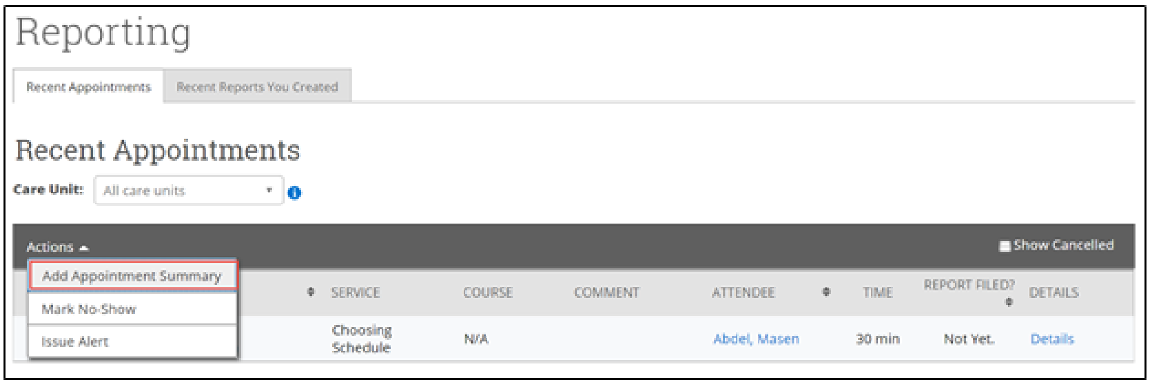
Appendix D: Add Appointment Summary Reports

Documenting a Student Interaction

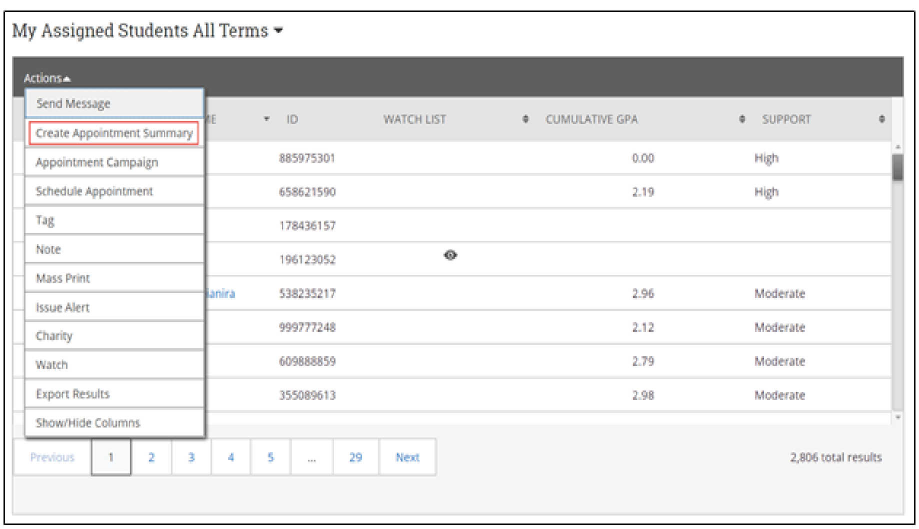
Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

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!

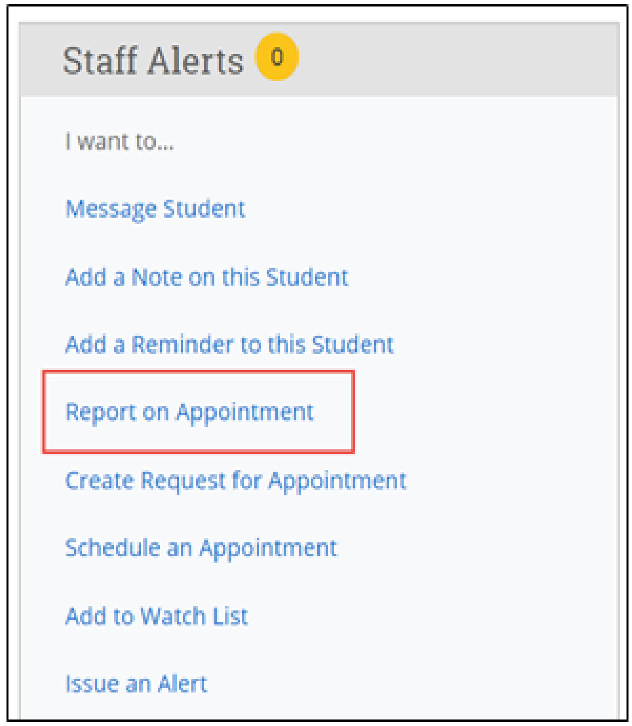
Appendix D: Add Ad Hoc Appointment Summary Reports

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!

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Appendix E: Create a Progress Report or Issue an Alert

Submitting a Progress Report

Navigate's [Progress Report](#) feature is used by faculty to share critical academic information on students enrolled in their courses when a report is requested by another office (such as a request from the Athletics offices to report on athletes enrolled in a class). Use the instructions below to submit a Progress Report.

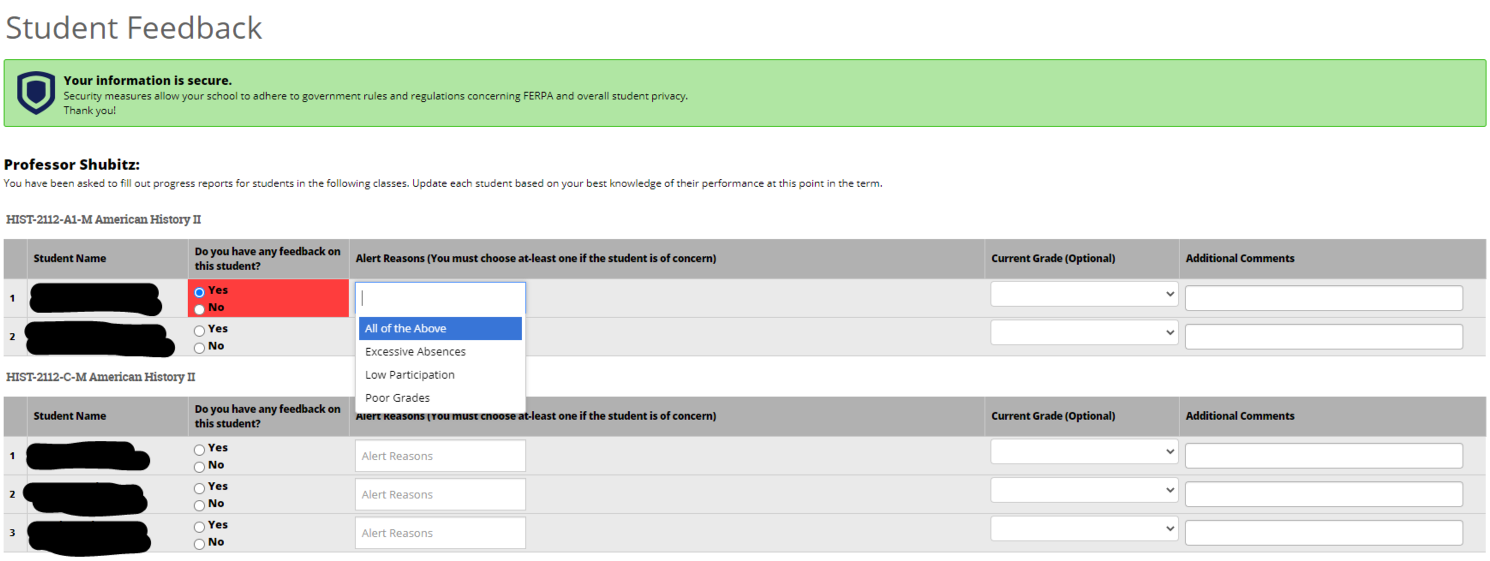
Step 1: Access the Progress Reports that have been requested either directly from the request email or by logging in to the Navigate platform and toggling to the Professor home page.

Step 2: Click "Fill out Progress Report" from email or home page.

Step 3: In the feedback screen, you will see a list of course sections and students that feedback is being requested for. This may or may not include all the students enrolled in your courses this semester. Begin filling out feedback according to the instructions provided in the Progress Report request email.

Step 4: If you have feedback about a student, select "Yes" and choose an "Alert Reason" that indicates why you are submitting feedback on this student. You may choose more than one alert reason. Please fill out the remaining columns, including the comments section with additional detail that will help an advisor follow up with this student.

Step 5: When submitting your Progress Reports, you have the option to submit only the students you have filled out feedback for or to submit all students. If you choose to submit all students, the students who you have not filled out feedback for will be marked as "I do not have feedback about this student."



TIP: Use the glossary of Alert Reasons on page 14 to understand what follow up action will be associated with each Alert Reason.

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

Appendix E: Create a Progress Report or Issue an Alert

Submitting an Ad-Hoc Alert

Navigate's ad hoc alerts are used by faculty and staff to share critical information and to create referrals for student between support offices. Use the instructions below to submit an early alert and mobilize support for a student.

Step 1: Click the "Issue an Alert" link in the upper right-hand corner of your home page.

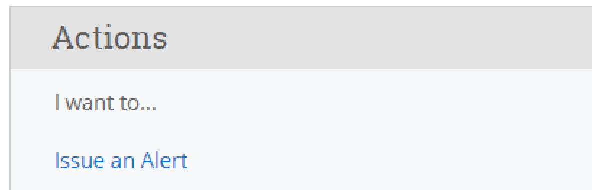
Step 2: Search for the student for whom you'd like to issue an alert (using name or ID).

Step 3: Select the reason(s) you believe the student needs assistance. The reason(s) you choose will connect the student with the appropriate office. See more details on the specific alert reasons below.

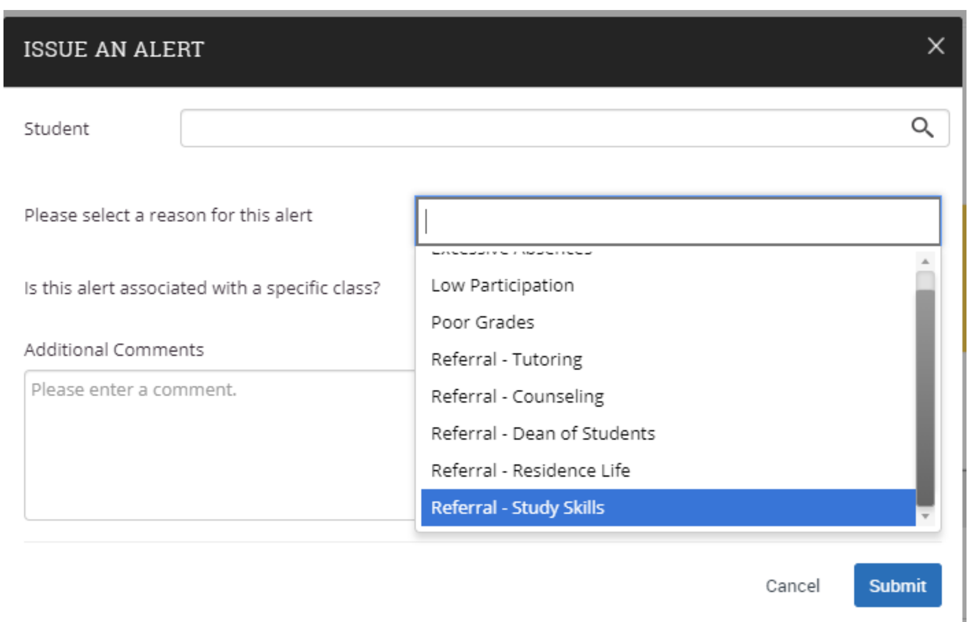
Step 4: If the alert is associated with a particular class, fill out that field.

Step 5: Lastly, please provide any relevant context around your reason for submitting the alert in the comments section. Comments will help the team reviewing alerts to connect the student with the right resources in a timely fashion.

Step 6: Issuing an alert may open a case. You will receive an email notification when the case has been resolved.



TIP: Use the glossary of Alert Reasons on the next page to understand what follow up action will be associated with each Alert Reason.



For more detailed guidance, check out the Help Center!

Appendix E: Create a Progress Report or Issue an Alert

Alert Reasons in Progress Reports and Ad-Hoc Alerts

Navigate's ad hoc alerts are used by faculty and staff to share critical information and to create referrals for student between support offices. Use the instructions below to submit an early alert and mobilize support for a student. At this time, students are not notified when an alert is created.

Alert Reason	Description	Intervention
Athletic Attendance Concern	Class attendance concern specifically for a student athlete	A case will be created and assigned to Claire Mooney-Melvin in Athletics.
Athletic Injury Notification	A student athlete informs you that they are injured	A case will be created and assigned to Claire Mooney-Melvin in Athletics.
Course Concern: Missing work, Unengaged, and/or Absent	A student has failed to turn in a significant number of assignments, is be attending class but is significantly or completely unengaged with the class and/or material, or more than three unexcused absences	A case will be created and assigned to Cathy Brown in University College.
Kudos/Student is doing well	A student is doing remarkably well in class, either in general or following a period of difficulty/disengagement	No case is created, but the alert is added to the student's record in Navigate.
Referral – Tutoring	A student needs help from the Academic Success Center	A case will be created and assigned to Philip Adams in University College.

Other Types of Student Referrals

If you need to refer a student to the Dean of Students office for a behavioral or general wellness concern, you can do so by going to the [Student Conduct webpage].

If you have concerns about a student's emotional or psychological health, you can contact the Counseling Services staff and access other resources on their [Concerned About a Student?] webpage.

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

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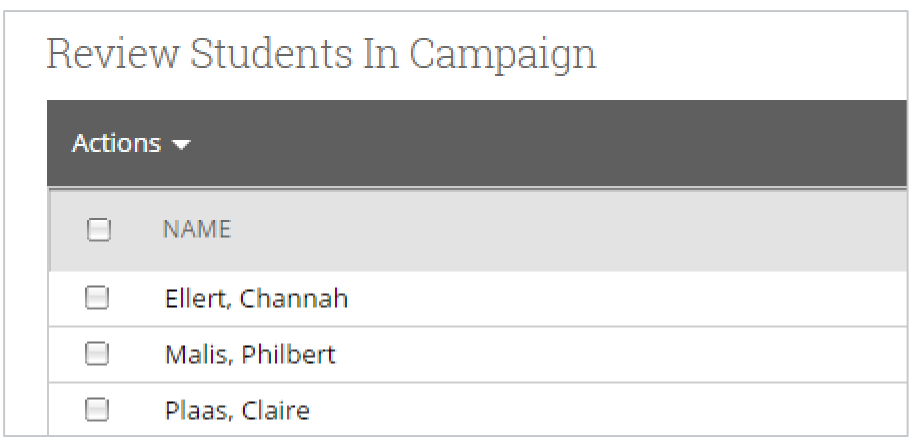
Appendix F: Creating an Appointment Campaign

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 the applicable Care Unit for your campaign
- Choose your location. NOTE: Ensure that the campaign availability you select matches the campaign availability you set up on your staff home page under "My Availability".
- Under "Service", choose the services for which you are available. NOTE: This also must match the availability you set up on your staff home page under "My Availability".
- Begin Date and End Date - choose the date range for which you want the campaign to run. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired. NOTE: This must match the availability you have set up on your staff home page, under "My Availability".
- Appointment Limit - how many appointments can the student schedule for the campaign? (default is 1)
- Appointment Length - how long do you want the appointment to last?
- Select 1 slot per time (select more if you'd like more than 1 student to select the same time slot)

Adding Students: Use the advanced search feature to search for students you would like to participate in the campaign. Or choose one of your saved searches by clicking the drop-down arrow beside "Saved Searches".



Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under "Add Advisors to Campaign". If applicable, select other users 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!

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