

Quick Start Guide for Navigate

You institution has launched the Navigate platform for advisors, faculty and staff, with the goal of helping students explore a path to timely graduation completion with data, services, and supportive connections. Use this Quick Start Guide to make the most of your experience.

GETTING STARTED

Login to Navigate using your university credentials!

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 Advisor 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 institution's calendar system. See Appendix B for detailed instructions.

KEY PLATFORM FEATURES

Perform These Key Actions to Identify, Communication With, and Support Students

- **Reference the Student Profile** – After clicking on a student's name through the search results, your Advisor Home, or the Quick Search, note their Academic progress and any areas of concern with the various tabs on a student's profile
- **Add Notes or Advising Summary Reports** – Record your interactions and follow-ups from student meetings by adding an Advising Summary Report (record associated with an appointment) or a Note (general record not associated with a specific meeting)
 - Both are accomplished through the 'Actions' menu on your Advisor home or search results, or from a student's profile.
 - **Reminder!** For scheduled appointments, add summary reports from the "Upcoming Appointments" tab of the advisor home.
- **Mass Email a Group of Students** – Use 'Send a Message' from the 'Actions' drop-down to contact your Assigned Advisees list or other lists you've created in the platform.
- **Create an Appointment Campaign** - Use this to invite students set up an advising appointment during times you have designated –
 - From the 'Actions' menu on your list, select 'Appointment Campaign' – See Appendix C for detailed instructions on creating a campaign.


Appendix A: Setting Up Your Availability

Availability

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

Advisor Home ▾

Students | Upcoming Appointments | **My Availability** | Advising Center | Advising Requests

 Edit Appointment Constraints

Times Available

Actions ▾						
	OF	TIMES	DATES	LOCATION	SUBJECT	
<input type="radio"/>	Tue, Wed, Thu, Fri	8:00a-5:00p	Forever	Academic Success Center	Advising, Changes to my Schedule, Internship/Job Search Assistance, Interview Coaching, Orientation, Resume Development, Selecting a Major, Weekly Meeting / Scheduled Meeting For Appointments	Edit
<input type="radio"/>	Mon	9:00a-5:00p	Forever	Academic Success Center	No listed Student Services	Edit

ADD AVAILABILITY ✕

I'm available on

Mon Tue Wed Thu Fri Sat Sun

8:00a - 5:00p

for Drop-ins Appointments Campaigns

Duration

Location

Select Location to select Student Services

Cancel

Add Time -

Step 1: Click the Add Time button in the Actions Menu

Step 2: Select the days and times when you are available to meet with students.

Step 3: Select whether you will meet with students via appointments or drop-ins during that time. The campaign option is availability reserved specifically as dedicated time for targeted students to make appointments with you.

Step 4: Choose the location where you will be available.

Step 5: Lastly, select which student services you can provide to students during this availability. Note: Leaving this student services field empty means you will appear to be available for all advising student services.

Appendix A: Setting Up Your Availability

Step 6: Click the Save button.

Repeat this process until all of your availabilities have been defined.

Note: You can have as much availability as needed.

There are two other options when adding Times Available.

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.

Note: Inactive availabilities are highlighted in red in the Times Available grid.

The screenshot shows a form with three main sections. At the top is a dropdown menu labeled 'Location'. Below it is a text input field with the placeholder text 'Select Location to select Student Services'. At the bottom is a larger text area labeled 'Details'.

Tip –

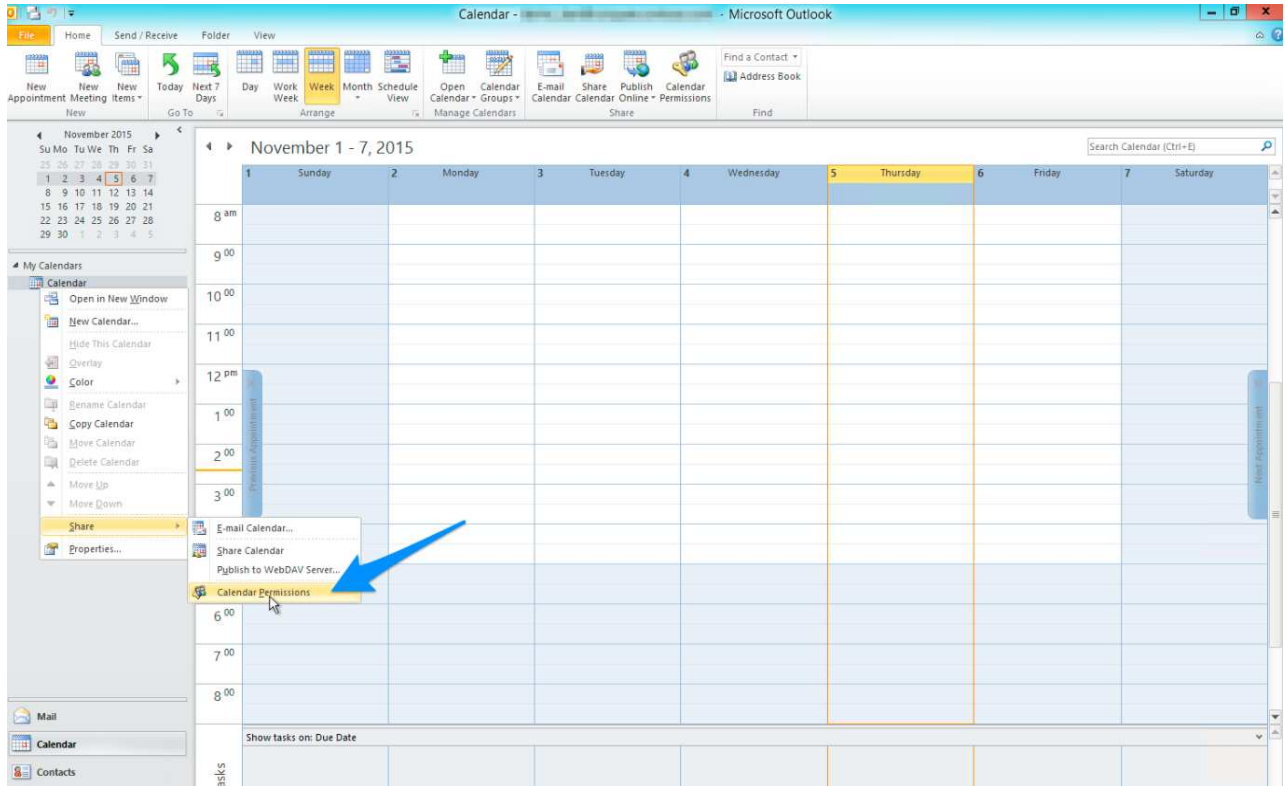
Use the Details box under “Add Availability” to include personalized information, such as your office room number and location.

The screenshot shows a light gray dialog box with two buttons at the bottom right: a 'Cancel' button and a blue 'Save' button.

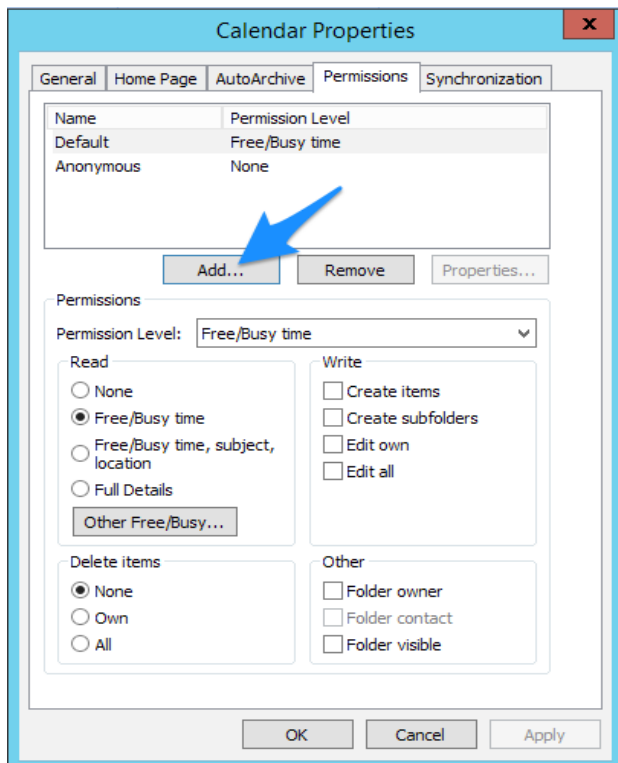
Appendix B: Sync Your Calendar (For Delegation Members)

Individual User Permissions Setup: Outlook

1. In Outlook, right click on your Calendar, select Share, and click "Calendar Permissions".



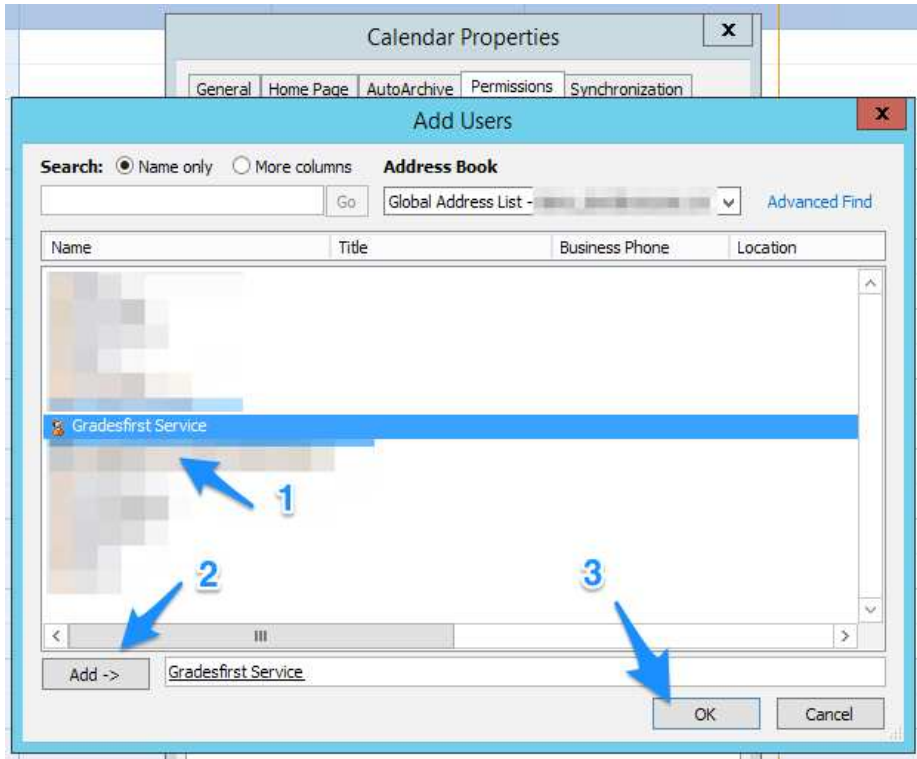
2. In the Calendar Properties dialog, click "Add..."



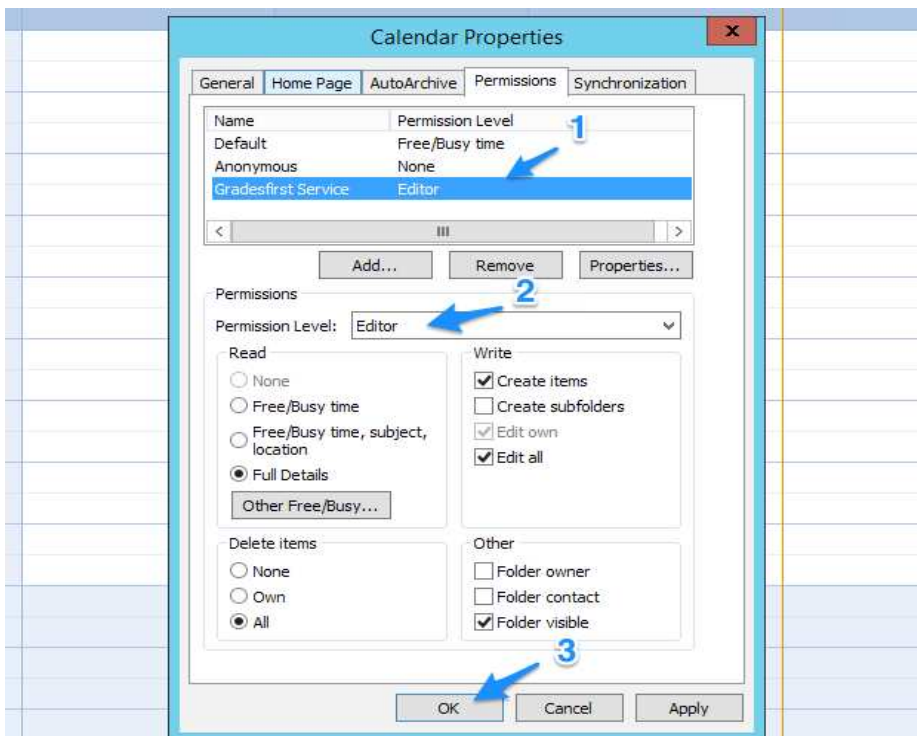
Appendix B: Sync Your Calendar

Individual User Permissions Setup: Outlook

3. Find the service account. The name of this account may vary. Contact your Application Administrator for Guidance if you are unclear as to your service account name.



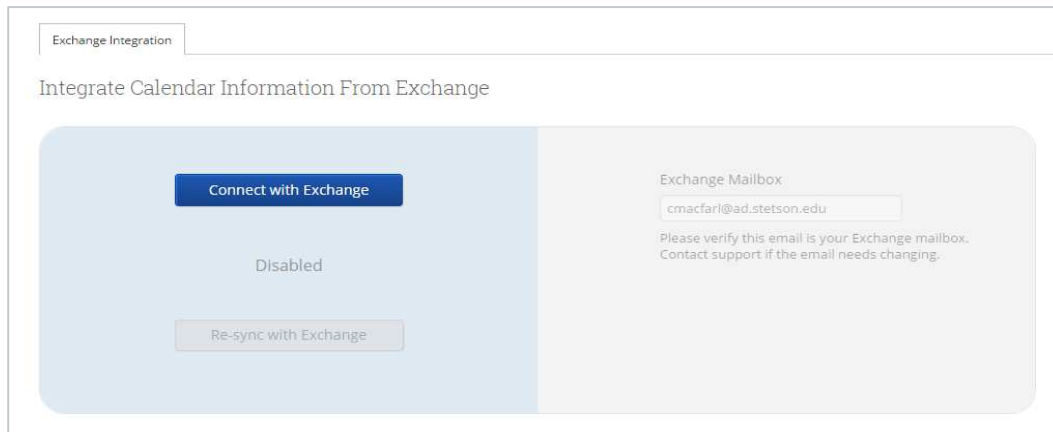
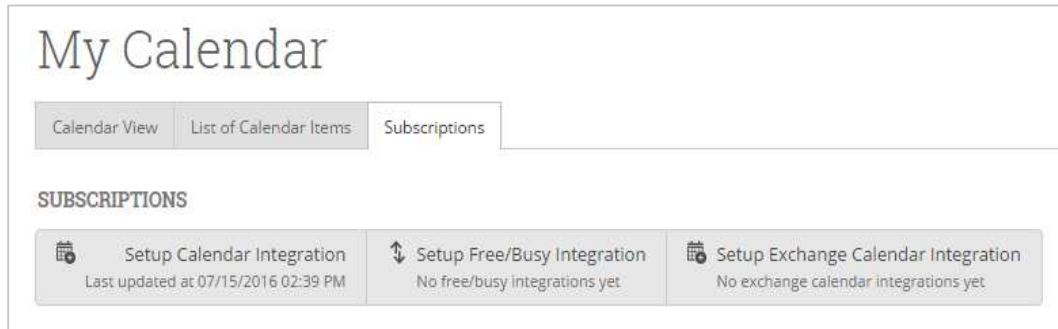
4. Set the Permission Level for this account to Editor or Author.



Appendix B: Sync Your Calendar (For Impersonation Members)

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.

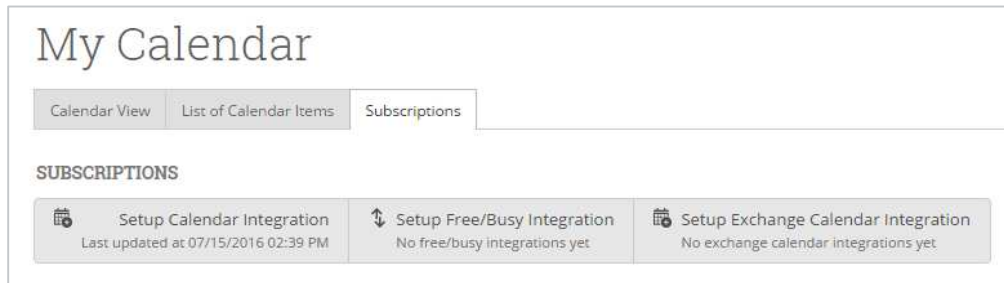


Navigate to the "Subscriptions" tab and then select only "Set-Up Exchange Integration", the third option on the right. The next screen will prompt you to enter your email address and then hit the blue "Connect with Exchange" button.

Appendix B: Sync Your Calendar (For Gmail Members)

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.



Navigate to the "Subscriptions" tab and then select "Setup Calendar Integration". On the next page, click on the "Google Integration" tab. Finally, click on the "Click here to set up Google Calendar Integration" link.

[Click here to set up Google Calendar integration](#)

You can now sync your calendar by clicking the "Connect with Google" button. You will be prompted to complete the sync from your Gmail account confirming your request to sync. Click "Allow". You will then be relocated back to Navigate. Click on the drop down for "calendar for two-way sync" and select your Gmail address. Click on the drop down for "Calendars for Free-Busy Sync" and select your Gmail address. Finally, click the "Save and Update" button. This should complete your calendar sync. Please log into Gmail to view your calendar and compare it against the calendar within Navigate. You can reach out to your Business Analyst for any technical questions. You can also reach out to your Dedicated Consultant for management and use of the calendar from a functional aspect.

The Two-Way Sync will enable that any agenda item created from the platform will sync back to your Google Calendar. The Busy-Free will bring in existing appointments and show your availabilities to anyone with access to your calendar for scheduling. All existing events and events that are created from Google Calendar will be shown as 'Busy.'

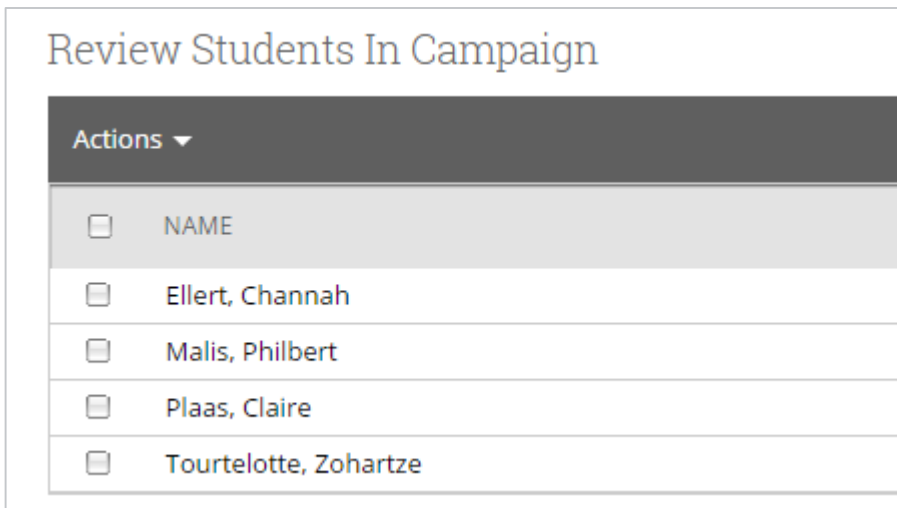
Appendix C: Creating an Appointment Campaign

Navigating to Campaigns: While on the advisor home screen, select "Appointment Campaigns" from the left hand side Quick Links section. This will take you to the Campaigns tab. From there, select Appointment Campaign from the right hand side, under Actions.

Define Campaign:

- Name your campaign (Students will not see the name of the campaign)
- Select "Advising" as the Campaign Type
- Select 1 slot per time
- Under "Select Course or Reason", choose the services for which you are available. NOTE: This must match the availability you have set up on your advisor home page, under "My Availability". In that screen, you must have selected matching appointment reasons. For example, if in your advising campaign you say you will be available for "Registration", you must also have chosen "Registration" as a service you are available for in your campaign appointment 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 advisor home page, under "My Availability". Ensure that you have created CAMPAIGN availability (as opposed to appointment or drop in availability) during the timeframe that you would like your campaign to run.
- Appointment Length- how long do you want the appointment to last?
- Appointment Limit- how many appointments can the student schedule for the campaign? (default is 1)
- 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).

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". If you want to ensure that you only return a list of students assigned to you, also click the box beside "My Students Only" next to the Search button. Select the students you wish to include in your campaign. Confirm the list of students included and remove or add students as needed.



The screenshot shows a web interface titled "Review Students In Campaign". At the top left, there is a dark grey button labeled "Actions" with a downward-pointing chevron. Below this is a table with a header row and five data rows. The header row has a checkbox and the text "NAME". The data rows contain the following names: "Ellert, Channah", "Malis, Philbert", "Plaas, Claire", and "Tourtelotte, Zohartze". Each name is preceded by a checkbox.

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

Appendix C: Creating an Appointment Campaign

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

Compose Your Message:

- Create a Subject Line for your email
- In the next box, edit the text for the email. Default is "Please schedule your advising appointment".
NOTE: Always be sure to keep the Schedule Link in your email body, if that is removed students will be unable to schedule appointments.
- In the instructions and notes box, add any details about the appointment that you would like to display on the scheduling landing page. For example, "This is a registration appointment to ensure you register for Fall 2016 classes. Please bring a list of courses you are interested in."
- As you edit these fields, the text in the box below will show how your edits will appear in the message.
- Scroll down to the bottom of the screen. On the left tab, you will see a snapshot of what the email the student receives will look like.
- On the right tab, you will see the scheduling landing page. This is where the student will be directed to choose a time for their appointment when they click the link in their email.

Confirm & Send: Review the details of your campaign. When you are ready, click send to issue the email to students on the list.