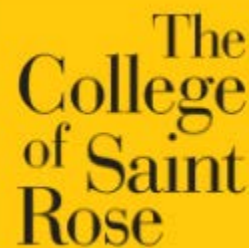




Student Success Collaborative Navigate



The College of St. Rose Guide for Navigate

The College of St. Rose has launched the Navigate platform for staff, faculty, advisors and others with the goal of helping students explore a path to timely graduation completion. Navigate can help enable this 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!

Training Site: <https://strose.campus-training3.eab.com>

Production Site: <https://strose.campus.eab.com>

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 Outlook 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
- **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 Staff home or search results, or from a student's profile.
 - **Reminder!** For scheduled appointments, add summary reports from the "Upcoming Appointments" tab of the staff 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 – See Appendix C for detailed instructions

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 university administrators.

Staff Home ▾

- Students
- Upcoming Appointments
- My Availability
- Appointment Queues
- Appointment Requests

Available Times

Actions ▾							
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
<input type="radio"/>	Mon, Wed, Fri	8:00a-5:00p EST	Forever	Office of Academic Advising	General Advising For: Appointments/Drop-Ins/Campaigns	Advising	Edit

ADD AVAILABILITY ✕

When are you available to meet?

From To

All times listed are in Eastern Time (US & Canada).

How long is this availability active?

What type of availability is this?

Care Unit

Location

Services

URL / Phone Number

Special Instructions for Student

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: 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.

Steps 6-8 Continued on next page...

Appendix A: Setting Up Your Availability

Special Instructions for Student

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

Step 6: Option to include a virtual URL (a link to the advisor’s Zoom for example) in staff availability and to also draw more attention to this for students as they are scheduling and getting reminders.

Step 7: Use the Special Instructions box under “Add Availability” to include personalized information, such as your office room number and location.

Step 8: Click the Save button.

Step 9: Repeat this process until all of 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)

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 are now able to create availability for group appointments by indicating how many students are able to schedule into the same appointment.

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

Appendix B: Sync Your Outlook Calendar

Integrating Your Calendar

PLEASE ONLY SYNC YOUR CALENDAR IN THE PRODUCTION SITE

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.

My Calendar

Calendar View
List of Calendar Items
Subscriptions

SUBSCRIPTIONS

Setup Calendar Integration <small>Last updated at 07/15/2016 02:39 PM</small>	Setup Free/Busy Integration <small>No free/busy integrations yet</small>	Setup Exchange Calendar Integration <small>No exchange calendar integrations yet</small>
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Exchange Integration

Integrate Calendar Information From Exchange

Disable integration with Exchange

Enabled
 Synced at 09/27/2018 03:07 PM

Re-sync with Exchange

Exchange Mailbox

KRISTIG@CLEMSON.EDU

Please verify this email is your Exchange mailbox.
 Contact support if the email needs changing.

Proceed 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 C: 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 ▾	
<input type="checkbox"/>	NAME
<input type="checkbox"/>	Ellert, Channah
<input type="checkbox"/>	Malis, Philbert
<input type="checkbox"/>	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.

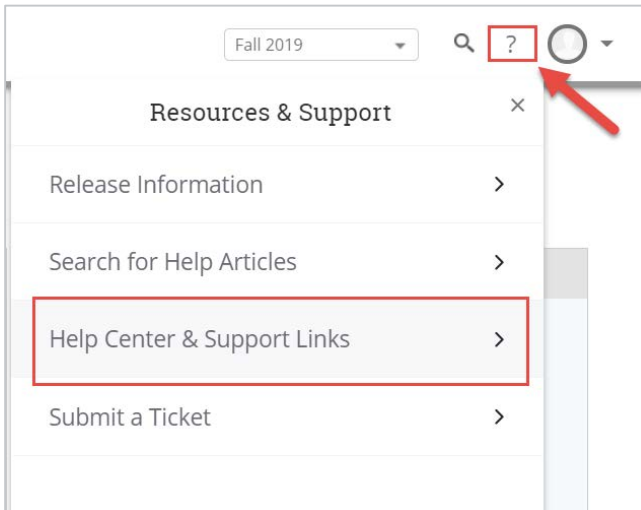
Compose Your Message:

- 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.

Need Help? Access EAB's Help Center

Visit the Navigate Help Center for articles and how-to instructions on all Navigate Features and Workflows.



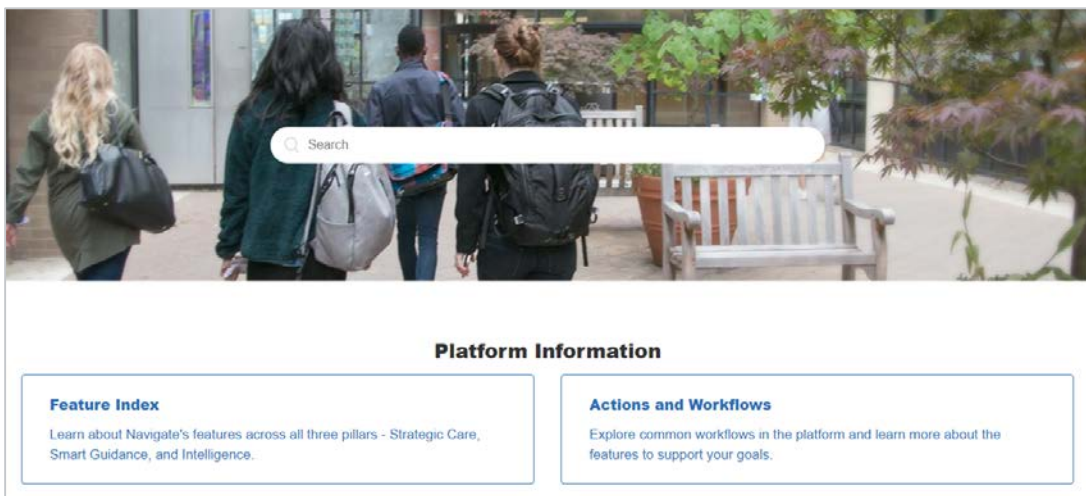
Accessing the Help Center -

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



Additional Questions? Email navigate@strose.edu for support!

Aligning Navigate with your Goals

Exit Response

The College of Saint Rose has a goal to increase retention and graduation rates through implemented practices and policies enabled by Navigate. The College has outlined four broken down objectives that can help achieve these goals.

Objective 1: Improve Communication Across Silos

Objective 2: Increase Student Engagement

Objective 3: Improve Time to Gradation

Objective 4: Streamline Processes and Systems into One Central Location

What are some specific practices that you can envision yourself or your office implementing or utilizing in Navigate that could assist in accomplishing one of the above objectives? Please note the objective(s)

Are there other objectives or practices that do not fit those outlined above that you envision Navigate being helpful for?
