Quick Start Guide for Navigate

Hunter College has launched Navigate for advisors and others, 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!

https://hunter-cuny.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 —

  - 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 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 *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

ADD AVAILABILITY ✕

When are you available to meet?

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |

From
8:00am

To
5:00pm

How long is this availability active?
Please select a duration ▾

What type of availability is this?

| Appointments | Drop-ins | Campaigns |

Care Unit
Please select a care unit ▾

Location
Please select a location ▾

Services
Please select services

Special Instructions for Student
e.g. room 23, please bring paper

Cancel   **Save**

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

Step 6: Use the Special Instructions box under "Add Availability" to include personalized information, such as your office room number and location.

Step 7: Click the Save button.

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 8: 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.

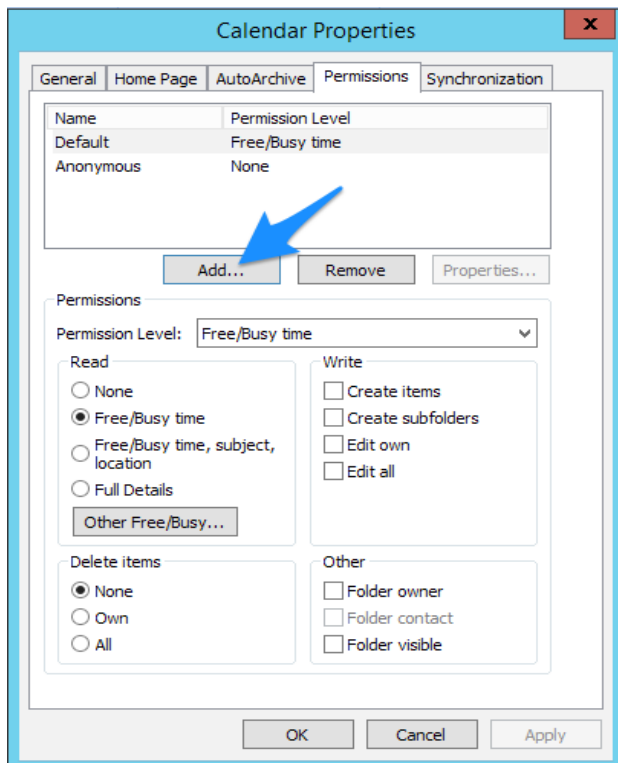**Inactive availabilities** are highlighted in red in the Times Available grid.

Appendix B: Sync Your Calendar

Individual User Permissions Setup: Outlook

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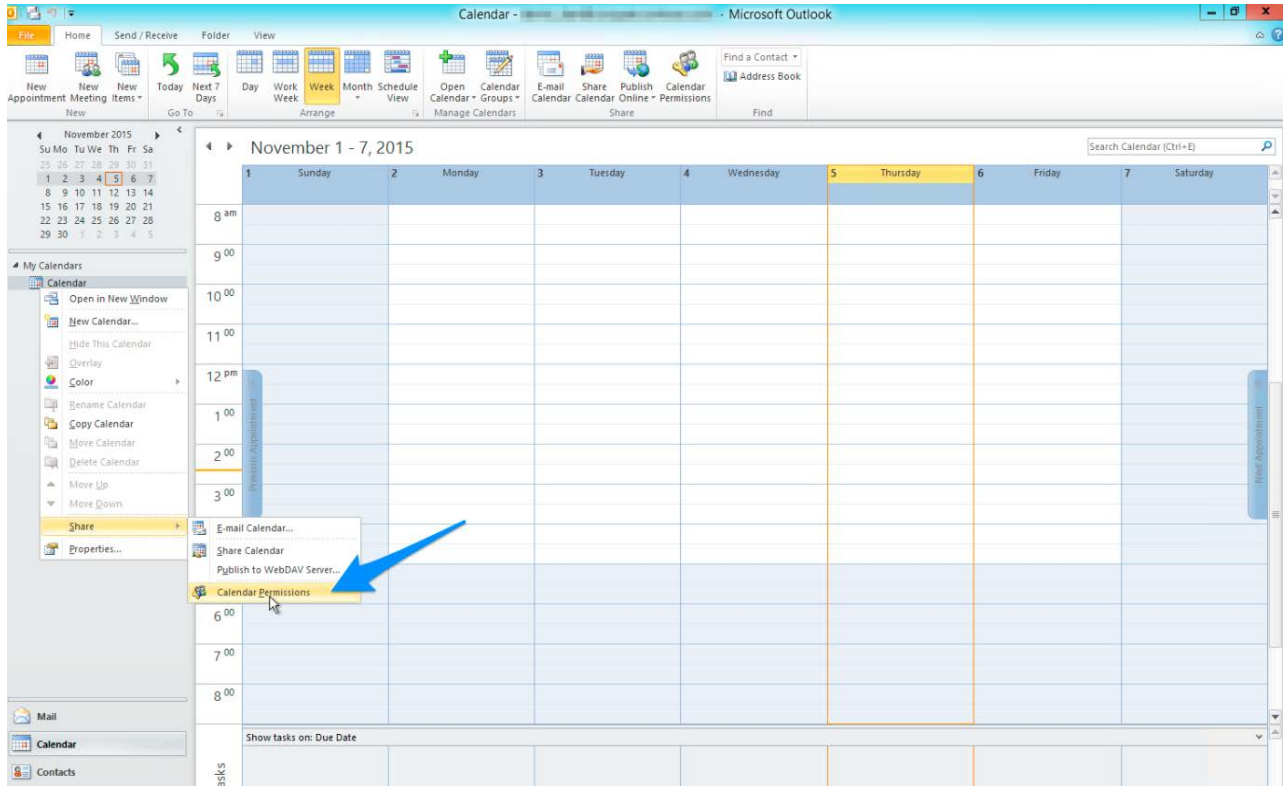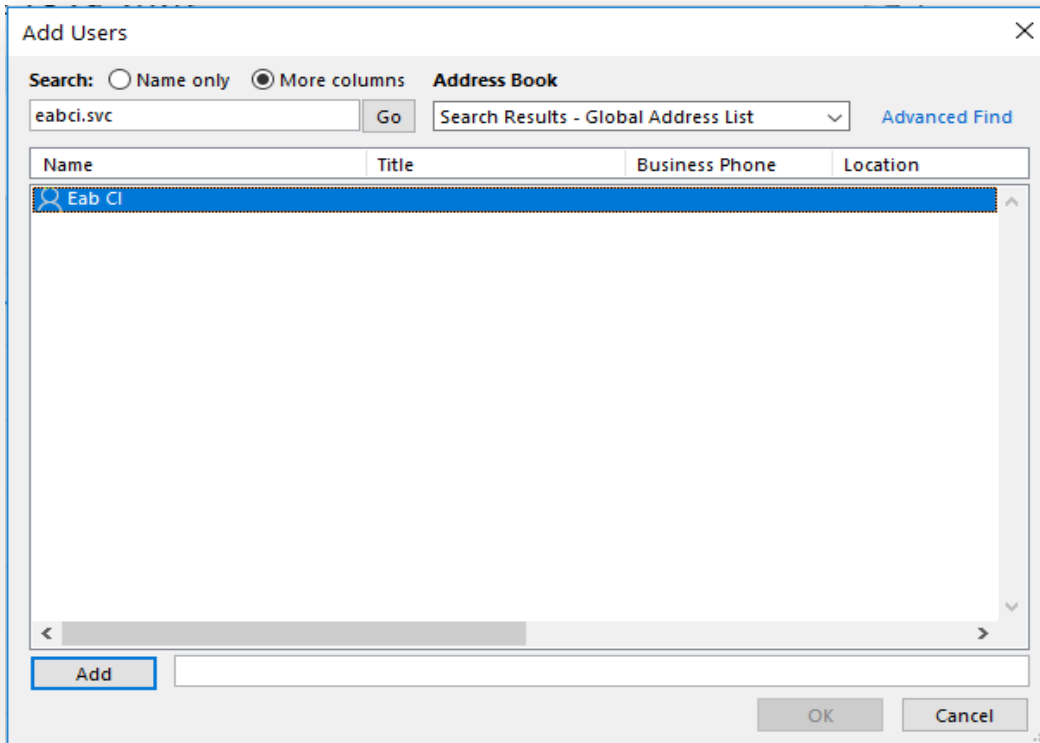

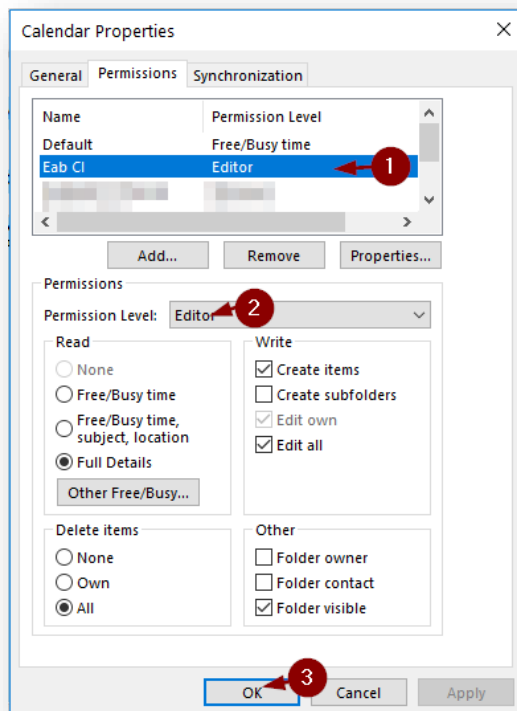2. In the Calendar Properties dialog, click "Add…"

Appendix B: Sync Your Calendar

Individual User Permissions Setup: Outlook

3. Find the service account. The name of this account is **eabci.svc**
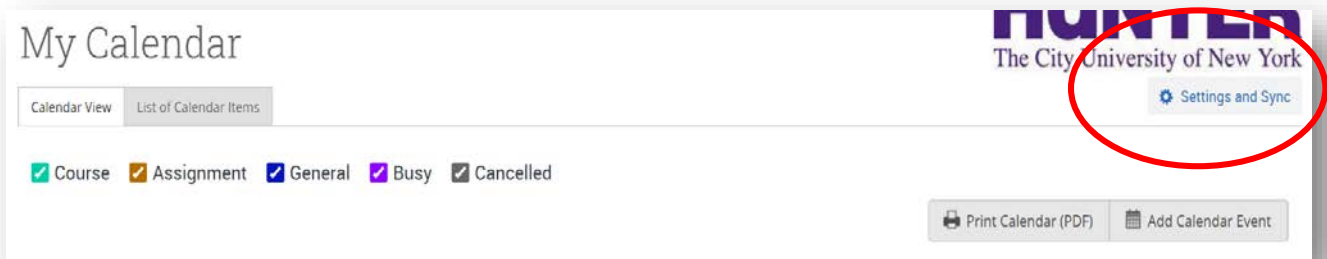

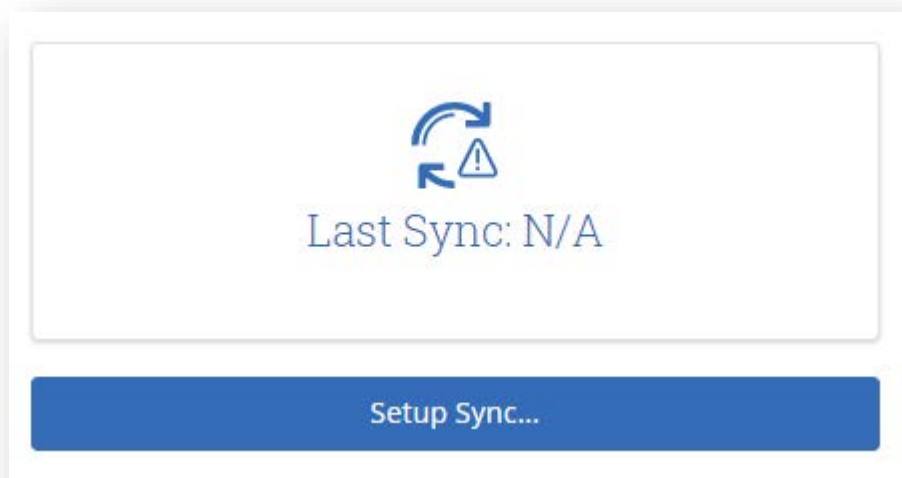4. Set the Permission Level for this account to Editor or Author.

Appendix B: Sync Your Calendar

Individual User Permissions Setup: Outlook

5. Login to the platform. From the advisor homepage, click on the "Calendar" icon in the purple menu to the left.

6. Click "Settings and Sync" in the upper right corner.

7. Click "Setup Sync"

8. Choose Microsoft Outlook. Then choose Outlook Service Accounts.

Setup Complete! Navigate will begin to sync data. You can leave this page if desired but please allow up to 5 minutes for the data to fully sync.

Note: Ignore if shown "Will be deprecated in 2020". It doesn't apply to our configuration but are unable to change the message.

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 ▾
☐ NAME
☐ Ellert, Channah
☐ Malis, Philbert
☐ Plaas, Claire
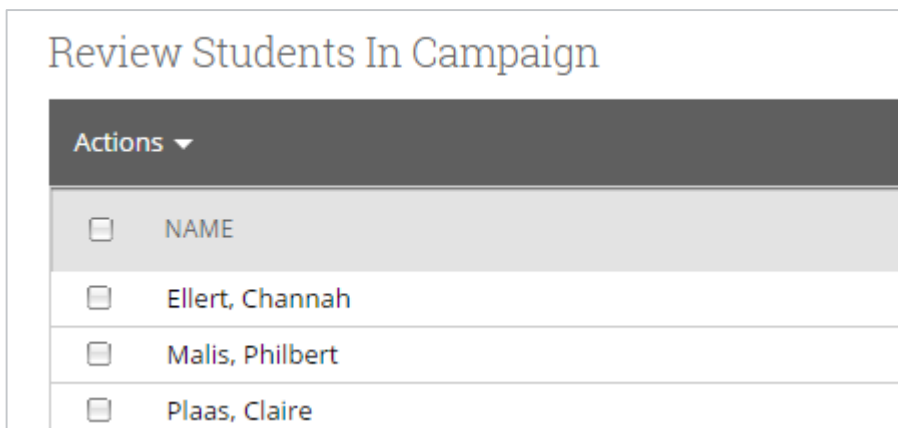
Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under "Add Advisors to Campaign". If applicable, select other advisors to join your campaign.

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.

Need Help? Access EAB's Help Center

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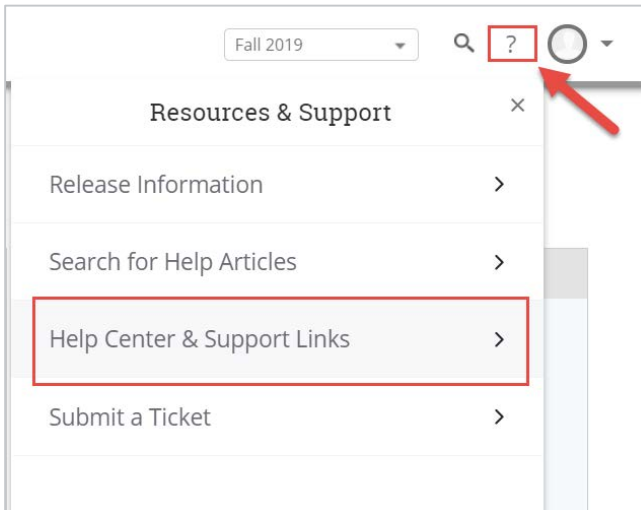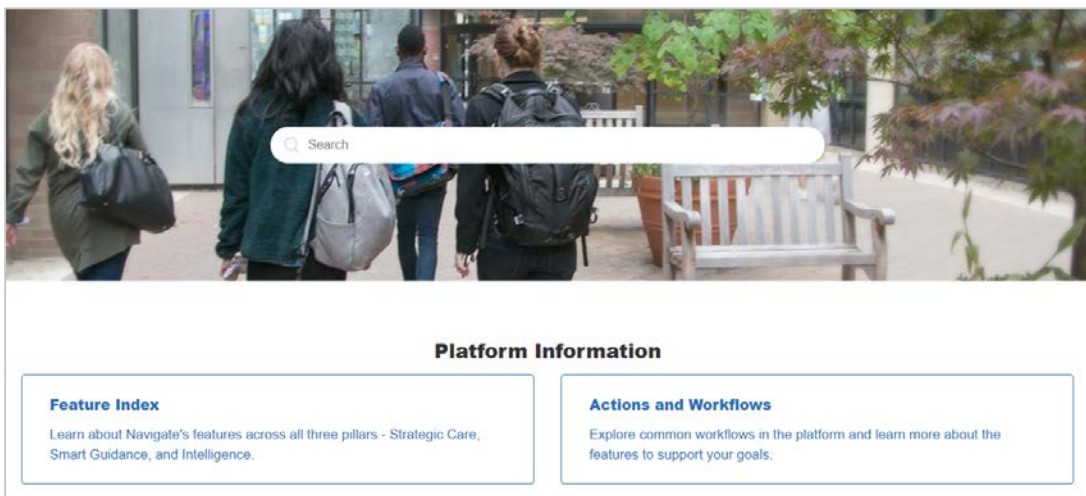

Accessing the Help Center -

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@hunter.cuny.edu or visit
hunter.cuny.edu/navigate