

NAVIGATE USERS MANUAL



University of Wyoming
Version 1.0

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Navigate Home Page

Review of the home page.

The screenshot shows the 'Staff Home' page in the 'NAVIGATE' system. At the top, there is a yellow header with the University of Wyoming logo and a 'Quick Search' bar. Below the header, there are navigation tabs: 'Students', 'Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. The main content area is titled 'Assigned Students' and features a table with columns for 'STUDENT NAME', 'ID', 'STUDENT LIST', and 'CUMULATIVE GPA'. A 'Tool Bar' is located on the left side of the page. On the right side, there are sections for 'Actions', 'Quick Links', and 'Upcoming Appointments'. A 'Support' button is visible in the bottom right corner.

Callouts in the image point to the following features:

- Quick Search:** The search bar at the top of the page.
- Tool Bar:** The vertical sidebar on the left containing various icons for navigation and actions.
- Tabs for setting up availability:** The 'My Availability' tab in the navigation bar.
- Actions and Quick Links:** The right-hand sidebar containing sections for 'Actions', 'Quick Links', and 'Upcoming Appointments'.

Some basic parts of the Navigate home page to become familiar with.

Quick Search: Allows for a quick search for any student using name, email address, W number or username.

Actions and Quick Links: Issuing alerts and creating Appointment Campaigns

Tabs: Setting up availability and seeing what students are waiting to meet with you in the Appointment Queue.

Tool Bar: Advance Search, Cases, Calendar, Emailing students, student lists and reports.

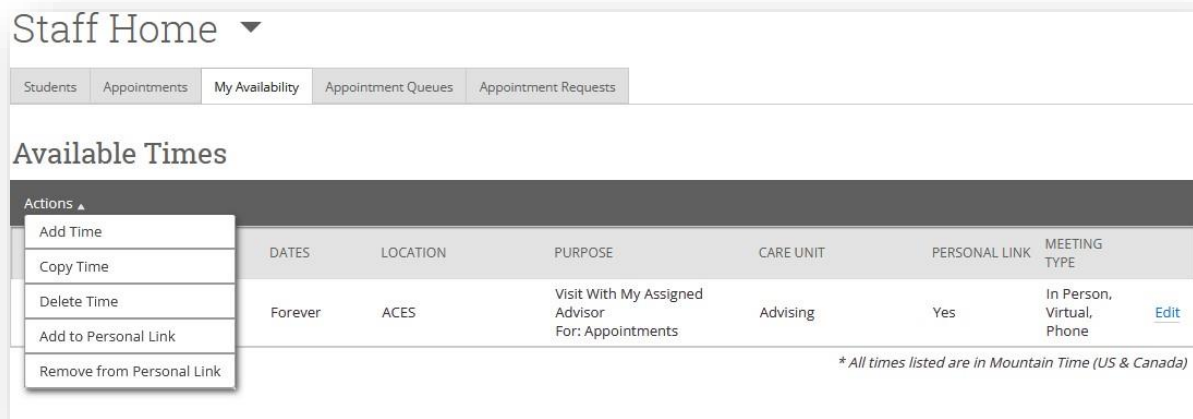
- **Advanced Search:** where create dynamic and static lists of students using numerous filters
- **Cases:** where you can manage alerts and referrals assigned to you
- **Calendar:** where you can sync your UWyo calendar to Navigate so your students don't schedule over any busy blocks
- **Lists and Saved Items:** where you can review any static and dynamic lists created via the Advanced Search
- **Reports:** where you can run data related to appointments, interventions, and student data

My Availability

Within Navigate, you will set up availability to allow yourself and others to schedule with a student. Setting up your availability is a very important starting place, but you can also edit your availability at any time.

Setting Availability

Define the days and times you will be available to meet with students. **Add Time**- from the Home page, select the “My Availability” tab



Step 1: Click the Actions drop-down menu and select “Add Time.”

Step 2: In the pop-up select the days and times when you are available to meet with students.

Step 3: Add the times when you will start and end daily availability.

Step 4: Select whether you will meet with students via appointments, drop-ins, or only for specific campaigns during that time.

Step 5: Select how long this availability will stay active.

Step 6: Select the type of available. We recommend “Appointments” and “Campaigns” at this time.

Step 7: Choose the meeting type (in person, phone, email).

Step 8: Chose Care Unit and Location.

Step 9: Select which student services you can provide to students during this availability. **Note: We suggest you list all the services.**

Step 10: Input any details such as a specific office location, check-in procedures, and/or things you want an attendee to bring to the meeting. These details should only be things that apply to every appointment of the type you are setting availability for, as the details will appear in a message to the person scheduled with.

Last step: Click the Save button.

Note: You can have as many availabilities as needed.

There are other options in the Actions drop-down menu under Available Times.

Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button in the Actions drop-down menu. 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 in the Actions drop-down menu. **Note:** Inactive availabilities are highlighted in red in the Times Available grid; “inactive” times will be any availability that does not include the current day.

Add to Personal Link – Creates a link you can embed or send to your students.

Remove from Personal Link – Removes the link.

Max Number of Students per Appointments – Use this setting for group advising with multiple students.

Sync Calendar

You must sync your Navigate calendar with your Microsoft calendar.

Step 1: Click on the Calendar icon on the side toolbar

Step 2: Click on the “Settings and Sync” link in the upper right side of the page.

Step 3: Chose the appropriate calendar type to sync. Most will use the Microsoft 365 option.

The screenshot displays the 'My Calendar' interface within the NAVIGATE system. At the top, there is a search bar and a 'Quick Search' dropdown. The main content area features a sidebar with navigation icons, a 'My Calendar' title, and two tabs: 'Calendar View' (selected) and 'List of Calendar Items'. A 'Settings and Sync' link is located in the upper right corner of the main content area. Below the tabs, there is a note about accessibility and a legend for event types with checkboxes for Advising, Course, Assignment, General, Busy, and Cancelled. At the bottom right, there are buttons for 'Print Calendar (PDF)' and 'Add Calendar Event'. A yellow arrow points to the 'Settings and Sync' link.

Appointments

There are many ways to schedule within the Navigate platform. Below, instructions are provided for scheduling an appointment from the perspective of an advisor. Front desk staff will schedule in a different way and eventually students may be able to schedule appointments for themselves, which will involve another method as well.

Scheduling Appointments

There are two ways to get to the Schedule an Appointment page:

- Click on Schedule General Event on the Quick Links Menu.
- If you have lists of students, an appointment can be scheduled by checking the box beside a student's name and then selecting 'Schedule Advising Appointment' from the Actions drop-down menu.

The screenshot shows the 'Schedule Appointment' page for the University of Wyoming. The page is divided into several sections:

- Filters:** Includes dropdown menus for 'Care Unit' (with a placeholder 'Select a Care unit'), 'Location' (with a placeholder 'Please Select care unit to select location'), 'Service' (with a placeholder 'Select a location to select service'), and 'Meeting Type' (with a placeholder 'Select meeting type'). There is also a search box for 'Course' and a text area for 'Comments'.
- People Attending (0):** A section for managing attendees, including an 'Add an Attendee' search box and 'Additional Slots' controls.
- Buttons:** 'Save Appointment' and 'Cancel' buttons are prominently displayed.
- Calendar:** A 'Select a Date' calendar for March 2022 is shown at the bottom left.
- Support:** A blue 'Support' button is located in the bottom right corner.

Step 1: Select appropriate Care Unit.

Step 2: Select location – College advising center or departmental unit.

Step 3: Select Service – “Meet with advisor”, “Early Alert”, etc.

Step 4: Add course if appropriate.

Step 5: Select Meeting Type – Email, in person, ect.

Step 6: Add any detail about the reason for the appointment in the Comments box. These comments are **seen by both the student and the advisor** when they look at their calendar and receive their

appointment notification email. This section should be used only if more detail is needed to identify what will be discussed in the appointment.

Step 7: Date - Click on a date on the month-in-view calendar to see a week of availability on the scheduling grid.

Step 8: Select an organizer (i.e. person student will meet with).

The screen will show all the available appointment times available for the advisor or staff person.

Select a Date

March 2022

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Reminders

- Send E-mail Reminder to the organizer attendee?
- Send E-mail Reminder to non organizer attendees?
- Send a text reminder to the organizer attendee?
- Send a text reminder to non organizer attendees?

Page, Carly For: Appointments/Campaigns Mon-Fri 8:30am - 4:30pm MT

Choose A Time To Meet

Length: Availabilities?:

TIME SLOT	03/20 (SUN)	03/21 (MON)	03/22 (TUE)	03/23 (WED)	03/24 (THU)	03/25 (FRI)	03/26 (SAT)
6:00am - 6:30am MT							
6:30am - 7:00am MT							
7:00am - 7:30am MT							
7:30am - 8:00am MT							
8:00am - 8:30am MT			BUSY				
8:30am - 9:00am MT	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	
9:00am - 9:30am MT	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1 BUSY	
9:30am - 10:00am MT	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	
10:00am - 10:30am MT	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	
10:30am - 11:00am MT	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	

Repeat This Appointment?

Step 9: Choose A Time To Meet – There will be a checkbox for any times that are available for scheduling. If something is already scheduled or conflicts with that time, you will see that notated on the grid. For example, Appointments, Free, Busy, Conflicts (such as a student’s class), or in some cases Drop In's for walk-in appointment times. A blank means the selected advisor does not have availability for that time on that day. You can click on the word Conflicts or Appointment to see who has a scheduling conflict.

Step 10: Availabilities - The “Availabilities” drop-down is where you can override preset availabilities and schedule the appointment at any time at any day. Select the option “Unlock Times With Conflicts” and you will see checkboxes appear in every field in the grid. Selecting this option allows you to override any conflict or non-available day to schedule the appointment exactly where and when you want it.

Step 11: Repeat – If this is an ongoing appointment pick the appropriate category. “Repeat This Appointment?” is where you can make this appointment recurring. The default is set to “Does not repeat.” You may select other options from the drop-down list if you wish to make an appointment repeat.

Step 12: Reminders – Default is to send an email and text reminder to the attendee only. Choose the other boxes if you want a reminder as well. Note: Text reminder only works if the student has opted in to text messaging in Navigate.

Final Step: Save Appointment!

Upcoming Appointments

The purpose of the “Appointments” tab is to give the advisor a quick way to view and manage upcoming appointments.

Actions	DATE	ATTENDEE	REASON	COMMENT	REPORT FILED?	DETAILS
<input type="checkbox"/>	10/16/2015 01:30p - 02:00p		Advising		Not Yet.	Details

Please note that as soon as the appointment time starts for a given meeting that appointment will drop off this list and appear on the “Recent Advising Appointments” grid. For example, if an advisor has an appointment today at 9:30am, as soon as the time reaches 9:30, that appointment will be dropped from the Upcoming Appointments list and added to the Recent Advising Appointments list.

By default, the Upcoming Appointments tab will NOT show cancelled appointments. Check the “Show Cancelled” check box to include cancelled appointments in the list of upcoming appointments.

Cancel an Appointment

If you need to cancel an appointment, you can do so from the Upcoming Advising Appointments tab by checking the checkbox next to the appointment and clicking “Cancel Appointment” in the Actions drop-down menu.

Notice, the advisor is given the option to select for whom to cancel the appointment (typically you will select “Entire Appointment” as this cancels for all attendees), is required to select a reason why the appointment is to be cancelled, and lastly has an option to enter a comment about the cancellation. Clicking the “Cancel Appointment” button will instantly send out cancellation emails to all the attendees alerting them the appointment has been cancelled.

CANCEL UPCOMING APPOINTMENT

Cancel Appointment For: [Dropdown]

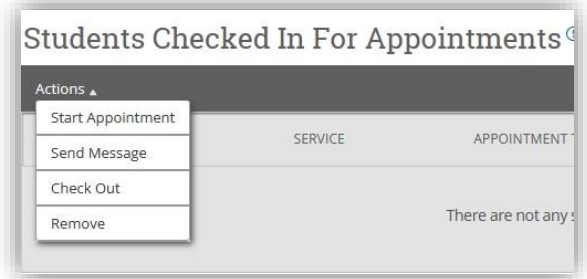
Reason: [Medical Emergency]

Comments: [Student is not feeling well and plans to reschedule.]

Close [Cancel Appointment]

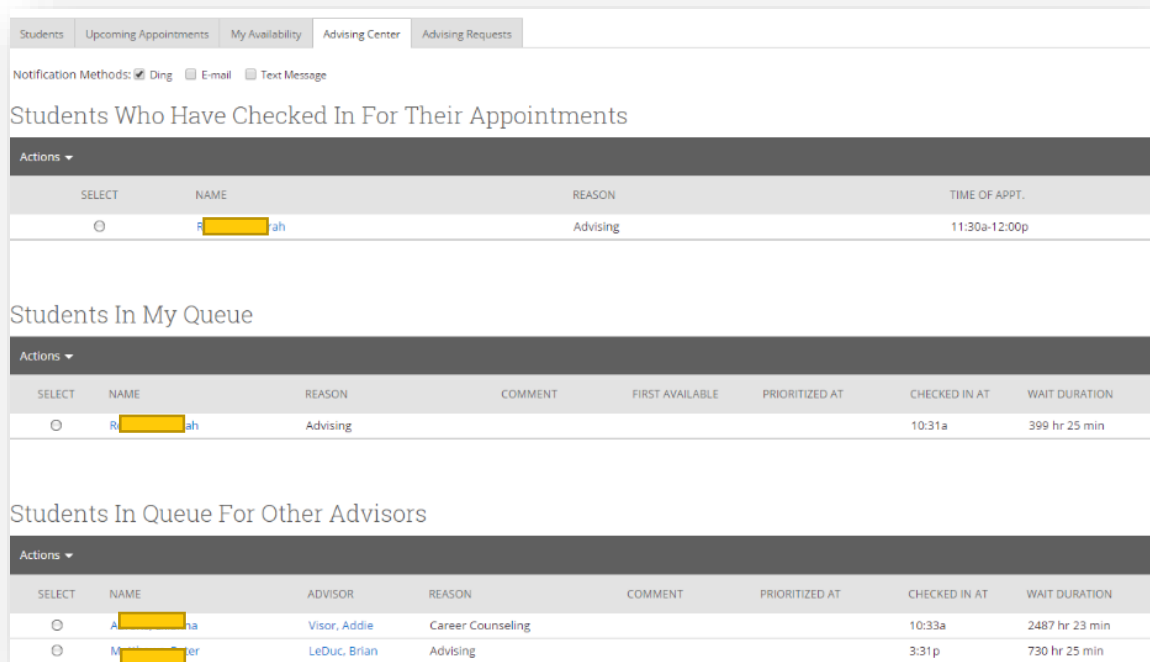
Appointment Queues

The Appointment Queues tab allows advisors to monitor and maintain visits for students in their queue or other advisors' queues. Select the "Advising Center" tab to see this listing.



Students Who Have Checked in for Their Appointments

This grid shows any students who have checked in for an appointment scheduled with you. These are NOT drop-in students. Drop-in students will never show up here.



Students In My Queue

This grid displays drop-in students. Students will show up here if they are waiting for the first available advisor (there will be a "Yes" in the "First Available" column) OR if they have requested to meet specifically with you but do not have a scheduled appointment (the section under "First Available" will be blank).

Students in Queue for Other Advisors

These are drop-in students who have requested to meet with another advisor AND students that have checked-in for a scheduled appointment with another advisor. Your office will decide if you should monitor this for students waiting a long time.

Starting an Appointment

To start an appointment from any queue:

Step 1- Click the circle beside the student with whom you will meet.

Step 2- Click the “Start Appointment” button in the Actions drop-down menu.

Step 3- An Advising Report will open to fill out at the conclusion of your appointment.

Note: Open the student’s profile in another tab or window on the internet browser prior to starting an appointment in Navigate. This will allow for viewing student information and keeping the Advising Report open.

Other options in the Actions drop-down menu in some of the queues will include:

Send Message: If you would like to send a message via email or text to a student, select the student and click Send Message.

Check Out: You can use this to end the appointment and check out.

Remove: You should use this action when a student leaves without first meeting with an advisor. You should then “Remove” them from the list. This is different than the “Not Attended To” option in that Not Attended To should be used when the student waited to meet with an advisor but there was not enough time, while the Remove option is for when the student leaves, of their own accord, without meeting with an advisor.

Advising Queue Shortcut

The Notification Bar (top left of your screen) includes the Advising Queue icon (person in graduation cap, with a person behind them) and provides a shortcut to the Advising Queue.

To start an appointment from this shortcut:

Step 1- Click on the Advising Queue icon.

Step 2- Select “Start Appt” next to the name of the student you wish to meet with.

Step 3- An Advising Report will open for you to fill out at the conclusion of your appointment.



Notifications

Each advisor will need to set their preferences for how they will be notified when a student visits the Advising Center.

To set up notifications:

Step 1: Click the “Appointment Queues” tab on the Advisors home page.

Step 2: At the very top of this page, select notification method(s). Check the box(es) next to the preferred notification method(s). Select from ding (audible), email, and/or text message.

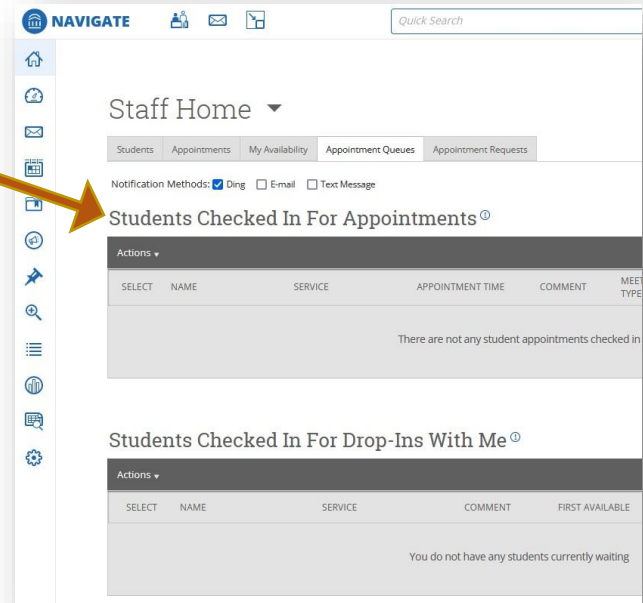
A student is added to a waiting list – Notifications are sent via ding (audible), pop up message (top right side of your screen), email, and/or text message if selected.

An appointment is created – Notifications are sent via email (these notifications go out, regardless of selected notification types, when an appointment is created).

A student checks in for an appointment – Notifications are sent via ding (audible), pop up message (top right side of your screen), email, and/or text message. The email notifications that are sent are advising appointment emails e.g. “A student has checked in for the appointment”.

An appointment is cancelled – Notifications are sent via email. Email notifications go out when the student appointment is cancelled on their calendar.

A student is removed from the queue – Notifications are sent via pop-up message.



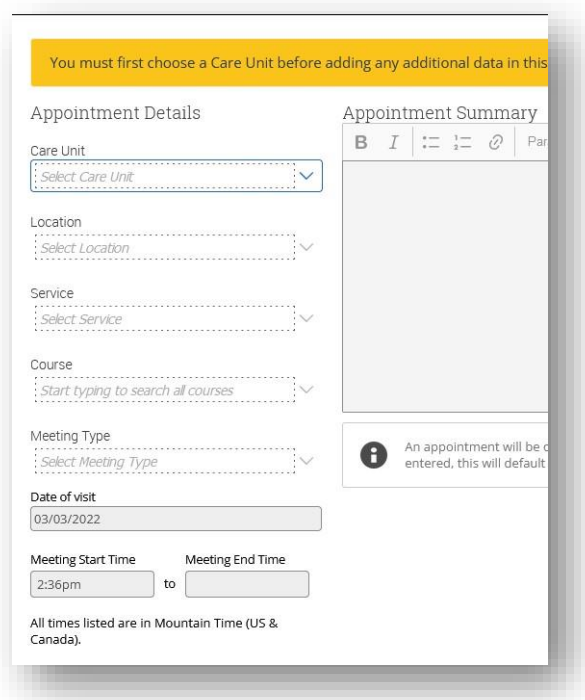
Advisor Reports

The “Appointment Report” dialogue box opens automatically when you start an appointment with a student. Most of the report is auto populated with the appointment information, except for the Summary Details and Appointment Summary. A report can also be added after an appointment or for students who have not created an appointment.

To add a report, check the box next to the student’s name and then select “Add Advising Report” from the Actions drop-down menu.

Create an Advisor Report

Step 1- Select Care Unit (Advising, Career Services, etc.)



The screenshot shows a dialog box for creating an appointment report. At the top, a yellow banner reads: "You must first choose a Care Unit before adding any additional data in this". Below this, the "Appointment Details" section contains several dropdown menus: "Care Unit" (with "Select Care Unit" as the placeholder), "Location" (with "Select Location"), "Service" (with "Select Service"), "Course" (with "Start typing to search all courses"), and "Meeting Type" (with "Select Meeting Type"). Below these is a "Date of visit" field with the value "03/03/2022". At the bottom, there are "Meeting Start Time" and "Meeting End Time" fields, with "2:36pm" entered in the start time field. A note at the bottom states: "All times listed are in Mountain Time (US & Canada)". To the right of the "Appointment Details" section is the "Appointment Summary" section, which is currently empty and has a rich text editor toolbar with icons for Bold, Italic, Bulleted List, Numbered List, Link, and Paragraph.

Step 2- Select Location (College of Arts & Science, College of Business, etc.)

Step 3- Select Service (Meet with Advisor, Early Alert, etc.)

Step 4- Select Course- If a specific course of the student’s was discussed you may select it. This is something we will not use very often.

Step 5- Meeting Type - Select your type of meeting (Email, In Person, etc).

Step 6- Summary- Complete the Summary Details, Radio Buttons and write the notes of your appointment. Please use departmental standards or the “Guide to Advisor Reports” supplemental document.

Step 7- Suggested Followup- Use this section if you suggest that a student schedule a follow-up appointment with you. This **does not** schedule an appointment with the student, it merely makes note that a follow-up was discussed.

Step 8- Attach File- Add a file to the report if appropriate.

Step 9- Save this Report- Review all information above and hit this button to enter your Advisor Report.
Recent Advisor Appointments

The “Appointments” tab displays your recent advising appointments.

Recent Advisor Appointments		Recent Reports You Created			
DATE	STUDENT NAME	SUMMARY	FOLLOW-UP?		
04/11/2016	[Redacted]	Student came to discuss P/NP but he really came to see An...	No	Details	Delete

Show Cancelled- Cancelled appointments are excluded by default. To include those cancelled appointments in this list, simply check the “Show Cancelled” box in the top left-hand corner of this section.

Recent Advisor Appointments		Recent Reports You Created						
Recent Advising Appointments								<input type="checkbox"/> Show Cancelled
Actions		DATE	REASON	COMMENT	ATTENDEE	ADVISING TIME	REPORT FILED?	DETAILS
<input type="checkbox"/>	1/1	04/12/2016 09:00a - 09:45a	Academic Advising		[Redacted]	-	Not Yet.	Details
<input type="checkbox"/>	1/1	04/11/2016 11:30a - 12:00p	Academic Advising	Discuss Pass/No Pass options.	[Redacted]	1 min	Report Details	Details

Details- The "Details" link allows you to access the “Manage Appointment” dialog to see the details of the appointment.

From the Actions drop-down menu you can:

Add Appointment Summary- File an advising report by selecting this action.

Mark No-Show- When a student fails to show up for the scheduled appointment, the advisor can mark them as a no-show using this option.

Issue Alert – Issue an alert

Recent Reports Created

This tab displays a list of your recent reports for quick access. Select “Details” to view a report.

Notes

Notes can be used to attach documents to a student's record and keep track of information about that student. Notes are for documenting things occurring outside of an advising appointment, such as petition submissions, or hallway conversation. Use is like a "Sticky Note" used on paper files.

To Add a Note from "Staff Home" or "Search"

Step 1: Check the box next to a student's name.

Step 2: Select "Note" from the Actions menu drop-down.

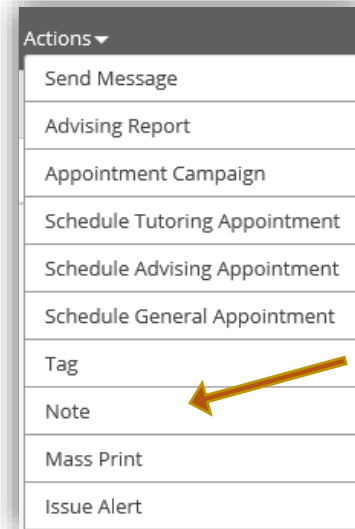
Step 3: Enter the text for your note.

Step 4: Enter a Note Reason (optional).

Step 5: Attach a file (optional).

Step 6: Select the proper permissions and visibility settings. Check the box next to the students name if you want the student to be able to view the note.

Step 7: Review your note and click "Save Note".



To Add a Note from Student Profile Page: Select "Add a Note on this Student" and follow steps 3-7 above.

A screenshot of a student profile page for "Emmaline Cowboy" at the University of Wyoming. The page has a navigation bar with tabs: Overview, Success Progress, Reports / Notes, Courses, Path, Academic Plan, and More. Below the navigation bar is a summary section with five columns: Course Grade D/F (0), Repeated Courses (0), Withdrawn Courses (0), Missed Success Markers (0), and Cumulative GPA (---). Below this is another section with two columns: Total Credits Earned (0.00) and Credit Completion % at this Institution (96%). On the right side of the page is a "Staff Alerts" section with a yellow circle containing the number 0. Below this section is a list of actions: "I want to...", "Message Student", "Add a Note on this Student" (highlighted with a yellow arrow), "Add a Reminder to this Student", "Report on Appointment", "Create Request for Appointment", and "Schedule an Appointment".

My Calendar

Your calendar is a quick way to view appointments or events at a glance. The calendar can be accessed clicking on the calendar icon on the left side menu bar.

My Calendar

Calendar View | List of Calendar Items

The calendar view is a graphical representation of the calendar. If you need a **fully accessible** interface, please use the list of calendar items view here: [Calendar Items View](#).

Checking/unchecking the legend boxes will show/hide corresponding events on the calendar

Advising Course Assignment General Busy Cancelled

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

March 2022

Sun	Mon	Tue	Wed	Thu
27	28	1	2	3
	8am Busy	8am Busy	8am Busy	8am Busy
	8:15am Busy	9am Busy	9am Busy	9am Busy
	9am Busy	11am Busy	9:30am Busy	9am Busy
	10am Busy	11:30am Busy	10am Busy	10am Busy
	11:30am Busy	12:30pm Busy	11am Busy	11:30am Busy
	12:30pm Busy	1:10pm Busy	11:30am Busy	12:30pm Busy
	1pm Busy	1:30pm Busy	12:30pm Busy	2pm Busy
	2pm Busy	1:30pm Busy	2pm Busy	2:15pm Busy
		2:30pm Busy	2:30pm Busy	3pm Busy
		2:48pm Reinstated Student Success (
		3pm Busy		
6	7	8	9	10
	8am Busy	8am Busy	8am Busy	8am Busy
	8am Busy	8:30am Busy	8am Busy	8:30am Busy
	9am Busy	9am Busy	9:30am Busy	9am Busy
	11:30am Busy	9:15am Busy	10am Busy	10am Busy
	12pm Busy	9:45am Busy	10am Busy	10:30am Busy
	12pm Busy	10am Busy	11am Busy	11am Busy
	12:30pm Busy	10:15am Busy	11:30am Busy	11:30am Busy

Key Features

Add Calendar Event – Clicking Add Calendar Event will bring up your appointment scheduling page.

Print Calendar – Here you can print your monthly or weekly calendar views directly to PDF.

View today, day, week or month – Quickly choose to view just today, or view by day, week or month. Using the left or right arrows allows you to view previous or future dates if desired.

Notice the Legend just above the calendar grid. Options listed include: **Advising, Course, Assignment, General, Busy and Cancelled**. Selecting one of the checkboxes enables associated appointments to show on the calendar grid and deselecting the checkbox hides them. (These options are automatically checked by default).

To view details of an appointment simply hover over the event on your calendar and a pop up box will appear.

Clicking on the event will open the Manage Appointment dialog, allowing you to edit, cancel, or delete with the appropriate permissions.

MANAGE APPOINTMENT ✕

Reinstated Student Success

All Attendees

message

You (Organizer)

cancel message

cancel message

Appointment Details [edit]

WHEN	TYPE
Thu Mar 03, 2022 2:15pm - 2:30pm MT	One Time Appointment
WHERE	CARE UNIT
ACES	Advising
SERVICE	COURSE
Reinstatement	ACES-1105 Reinstated Student Success
COMMENTS	
None	

Cancel Appointment
Delete Appointment
Close

List of Calendar Items-The List of Calendar Items tab provides, in list form, any appointments you have on the schedule for today, this week, and next week. There is also a “Print Calendar” option available for this view. If you have the permission to update specific appointments, then an “Edit” button will also be viewable.

My Calendar

Calendar View List of Calendar Items

Print Calendar Add Calendar Event

Today

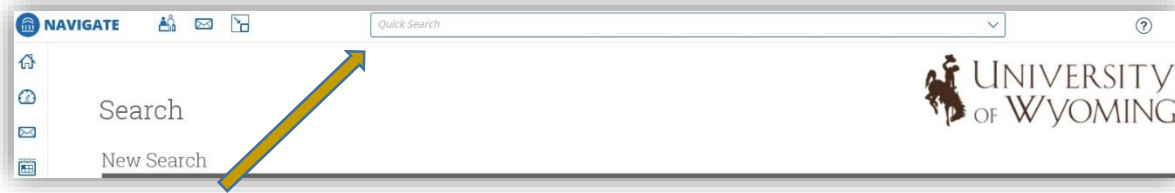
DATE	TIME	TOPIC	ATTENDEES	EDIT ENTRY
03/04/2022	7:00am - 3:00pm MT	Busy	Richard Miller	Edit 03/04/2022
03/04/2022	8:00am - 8:30am MT	Busy	Richard Miller	Edit 03/04/2022
03/04/2022	11:30am - 12:30pm MT	Busy	Richard Miller	Edit 03/04/2022
03/04/2022	12:30pm - 1:00pm MT	Busy	Richard Miller	Edit 03/04/2022
03/04/2022	4:00pm - 4:30pm MT	Visit With My Assigned Advisor		Edit 03/04/2022
03/04/2022	4:30pm - 5:00pm MT	Busy	Richard Miller	Edit 03/04/2022
03/04/2022	5:15pm - 6:15pm MT	Busy	Richard Miller	Edit 03/04/2022

This Week

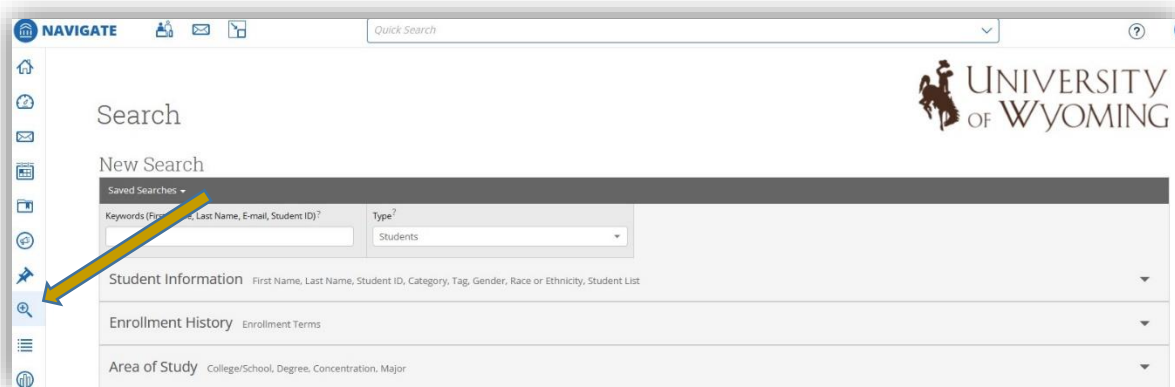
DATE	TIME	TOPIC	ATTENDEES	EDIT ENTRY
02/28/2022	8:00am - 8:30am MT	Busy	Richard Miller	Edit 02/28/2022
02/28/2022	8:15am - 9:00am MT	Busy	Richard Miller	Edit 02/28/2022

Searches

Quick search allows you to search by Keyword (Student ID, name, username, etc). This search will only allow you to search a specific character (or group of characters in the user's name), classification and/or category.



Advanced Search



Allows for searching for a specific group of users (e.g. students, professors, advisors) and then optionally perform some action for them. For instance, it is possible to get a list of all students in the business school with less than a 3.0 cumulative GPA and send them an email.

You can choose to search your assigned students only and/or include inactive students by choosing the respective boxes next to the Search button.

Additional Filters

Student Information – First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List.

Enrollment History – Enrollment Terms.

Area of Study – College/School, Degree, Concentration, major.

Term Data – Classification, Section Tag, Term GPA.

Performance Data – GPA, Hours, Credits.

Couse Data – Course, Section, Status.

Assigned To

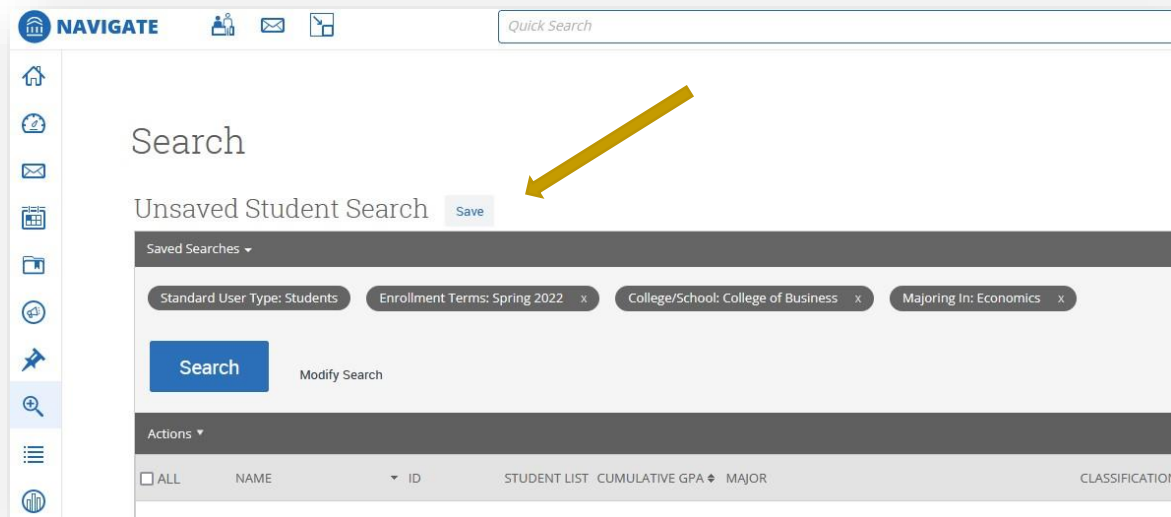
Goals & Interests – Post Degree Goal, Favorites?

Polls – Questions, Choices?

Success Indicators – Success Markers.

List Creation

To save a List, click the save search button in the upper left-hand corner of the page and you will be prompted to save your List.

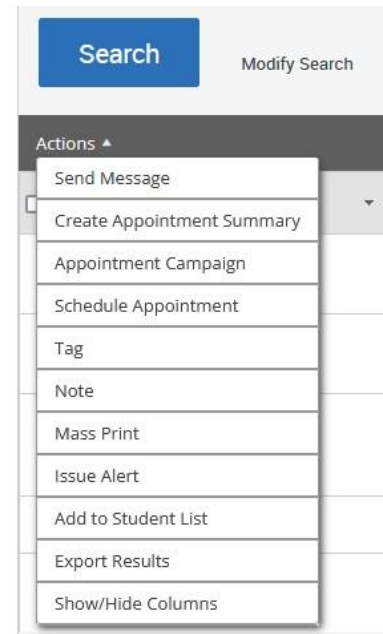


All saved Lists can be accessed through the Saved Searches drop down on the upper right-hand side of the page.

Actions Menu

When viewing your search results, the actions menu allows for several options as seen from the image on the right. Some key actions include:

- Send a messages
- Add an Appointment Summary
- Start an Appointment Campaign
- Schedule Appointments
- Tag
- Issue Alerts



Student Information

Overview

To view a student's profile, simply click the student's name via the link anywhere in Navigate. The Overview will be the first tab displayed.

Important! Change to Student View if you are viewing with a student so the student does not see Risk indicator (to be implemented Fall 2022).

Accounting
Bachelor of Science
College of Business

STUDENT ID: A00000004
ALTERNATE ID: 8B476B70D17E5588ED440003BAB02725

Other Major(s)
Professional Development
Non-Degree Graduate
UW College

CLASSIFICATION: Freshman
MOST RECENT ENROLLMENT: None

Goals & Interests (supplied by the student)

Post Degree Goal?	Career Priorities
None	None
Favorite Majors	Favorite Subjects
None	None
Favorite Fields	Favorite Activities
None	None

Active Appt. Campaigns: 0
Student is not involved in any active campaigns

Student Info
Student ID: A00000004
Address: Dept. 3275, BU 175 West, Laramie, WY 82071
Email: a00000004@unknowm.edu

Your Success Team

Student View

Student profiles are at the center of the advising application. However, to understand the importance of what the student profile can do, some background understanding is required which is covered in this

Laura Gonzalez

SSC University

Overview | Success Progress | Reports / Notes | Class Info | Major Explorer | More

Course Grade Out: 2	Required Courses: 1	Withstood Courses: 0	Missed Success Markers: 3	Cumulative GPA: 3.09
Total Credits Earned: 45.00		Credit Completion % at this Institution: 92%	Predicted Risk Level: High	

Biological Science
College of Arts & Sciences

STUDENT ID: 254316074
CLASSIFICATION: Sophomore
MOST RECENT ENROLLMENT: Spring Semester 2015

Advisors: Julia Simon, Griha Singla, Rich Staley, Amanda Wernicke, Latoya White, Rachel Wolfowitz, William Harmon, Ashlie Prioleau
Tutors

Categories

Staff Alerts: 3

I want to...
Message Student
Add a Note on this Student
Add a Reminder to this Student
Report On Advising
Schedule an Appointment
Add to Watch List
Issue an Alert
Edit User Settings
Impersonate User

Student Info

overview. The student profile is a set of information about the student and their academic performance. The profile contains information centered on proactively identifying students at risk of not graduating in their major and providing the tools to support the student.

The Academic Summary shows the student's major and division, the number of Ds and Fs the student has received, the number of repeated courses and withdrawals, the risk indicator for the student for his or her major, and most recent term of enrollment.

Users can also see the student's major, GPA, total credits, institution completion ratio (earned credits divided by attempted credits), missed number of success markers, the number of staff alerts (categories/tags), staff working with the student, and if the student has received any support on Navigate. By rolling over underlined information, users will get more detailed information.

Success Progress

The Success Progress tab will show details about the notifications. Success Progress shows the student's academic summary as well as success markers and the student's performance against the success markers. Success markers are a course or group of required courses key to student success within a major, frequently first and second-year courses, which are entered into the site so that advisors can identify and intervene with students who not completing the markers. These are based on the timeframe (credit accumulation) by which students must complete the course and the recommended grade threshold that students should achieve. You can learn more about success marker details by clicking any requirement that is blue. You can also look at completed, current, or upcoming notifications by selecting the appropriate button.

The Student Progress section also shows the student's GPA trend and credit accumulation, two factors used by the predictive model to determine student risk level.

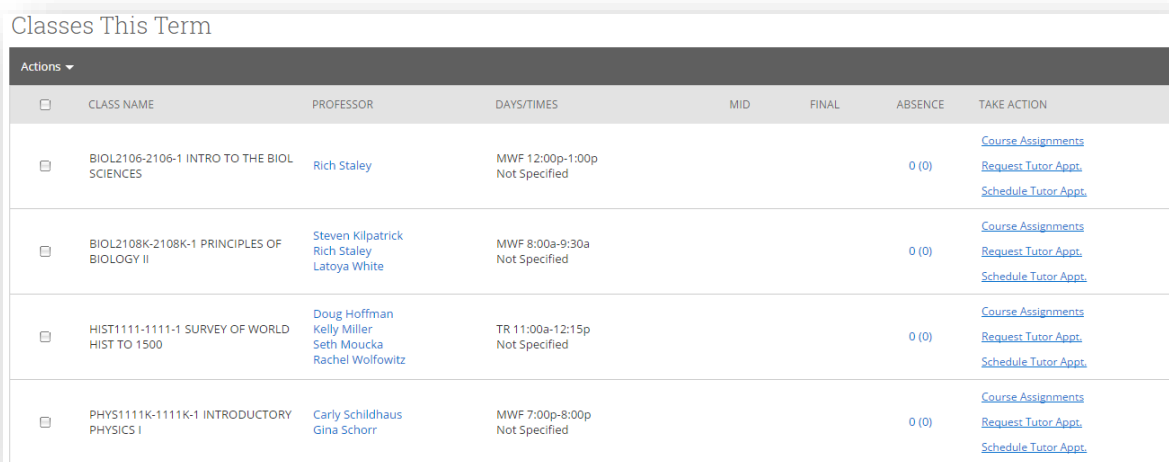


Users can view GPA term by term, likewise, users can view credit accumulation by term or cumulative credits accumulated, further broken out by credits attempted and credits completed when applicable.

Courses

The Courses tab displays the student's schedule for the current term. Alongside each course name will be a professor's name. You can click on the professor's name to view their profile. You will also see the days and times each class meets, along with final grades assigned. It's important to note that the mid-term and final grades come from Banner, not from a professor's grade submission. The Absence column is not currently functional.

Send Message to Professor- You can check the box beside one or more professors and click the “Send Message to Professor” in the Actions drop-down menu to quickly communicate with the student’s professors.



The screenshot shows a table titled "Classes This Term" with a dark header bar containing an "Actions" dropdown menu. The table has seven columns: CLASS NAME, PROFESSOR, DAYS/TIMES, MID, FINAL, ABSENCE, and TAKE ACTION. There are four rows of course data. Each row includes a checkbox in the first column and three links in the last column: "Course Assignments", "Request Tutor Appt.", and "Schedule Tutor Appt.". The ABSENCE column for all rows shows "0 (0)".

<input type="checkbox"/>	CLASS NAME	PROFESSOR	DAYS/TIMES	MID	FINAL	ABSENCE	TAKE ACTION
<input type="checkbox"/>	BIOL2106-2106-1 INTRO TO THE BIOL SCIENCES	Rich Staley	MWF 12:00p-1:00p Not Specified			0 (0)	Course Assignments Request Tutor Appt. Schedule Tutor Appt.
<input type="checkbox"/>	BIOL2108K-2108K-1 PRINCIPLES OF BIOLOGY II	Steven Kilpatrick Rich Staley Latoya White	MWF 8:00a-9:30a Not Specified			0 (0)	Course Assignments Request Tutor Appt. Schedule Tutor Appt.
<input type="checkbox"/>	HIST1111-1111-1 SURVEY OF WORLD HIST TO 1500	Doug Hoffman Kelly Miller Seth Moucka Rachel Wolfowitz	TR 11:00a-12:15p Not Specified			0 (0)	Course Assignments Request Tutor Appt. Schedule Tutor Appt.
<input type="checkbox"/>	PHYS1111K-1111K-1 INTRODUCTORY PHYSICS I	Carly Schildhaus Gina Schorr	MWF 7:00p-8:00p Not Specified			0 (0)	Course Assignments Request Tutor Appt. Schedule Tutor Appt.

Note: The last column of the “Classes This Term” contains several options that are not currently available (Course Assignments, Request Tutor Appt, Schedule Tutor Appointment).

Term Details

Term Details provides a term-by-term view of the student’s academic record, together with important metrics like term GPA and completion ratio. Pre-enrollment data will appear in the student’s first term. The amount and type of pre-enrollment data may vary depending on what is available for a particular student, but will generally include standardized test scores, high school name, and high school GPA.

Transcript

Spring Semester 2015

--(2)	BIOL21061A	INTRO TO THE BIOL SCIENCES	RW	
--(4)	BIOL2106A/B	PRINCIPLES OF BIOLOGY II	RW	
--(3)	HIST11111A	SURVEY OF WORLD HIST TO 1500	RW	
--(4)	PHYS1111K1B	INTRODUCTORY PHYSICS I	RW	

Fall Semester 2014

4	BIOL2107K1B	PRINCIPLES OF BIOLOGY I	C+	
4	CHEM212K1B	PRINCIPLES OF CHEMISTRY II	D	
3	PSYC1101A	INTRO TO GENERAL PSYCHOLOGY	A-	
3	RELS2001A	INTRO TO WORLD RELIGIONS	A+	

Term at a Glance:

Credits:	0
Credit Comp %:	-
Term GPA:	-
Cum GPA:	3.09
Academic Standing:	Good Standing

Advisors can get more details about a course by rolling over the course title.

Fall Semester 2014

3	BIOL3800	MOLECULAR CELL BIOLOGY	B	
3	BIOL3810	MOLECULAR CELL BIO LAB	B	
2	CHEM3100	ORGANIC CHEMISTRY LAB I	B	
4	CHEM3410	ORGANIC CHEMISTRY II	C	

Spring Semester 2014

3	AH1700	SU		C+
3	ANTH1102	IN		A

Details for CHEM3410:

CHEM3410	Grade: C
Status: REGISTERED	Attempted: 4
Attempted: 4	Earned: 4

Reports/Notes

Perhaps one of the most informational tabs on the student's profile is the Reports/Notes tab. It contains information on Alerts, Advisor Reports, Notes and visits to Student Support Centers. Note: Progress Reports, Tutor Reports, and Cases will come later.

Notes About Student

Actions

DATE	CREATED BY	NOTE	NOTE REASONS	COMPLETE?	ATTACHMENTS
09/22/2015	William Harmon	Information		--	edit

Advisor Reports- The Advisor Reports grid will list all of the advisor reports that have been filed for that student. An advisor report can be filed after an advising appointment and even when there isn't an appointment at all. Hover over the text under the "Summary" column to view the complete information of the report notes. Click "Details" to see more information about the appointment.

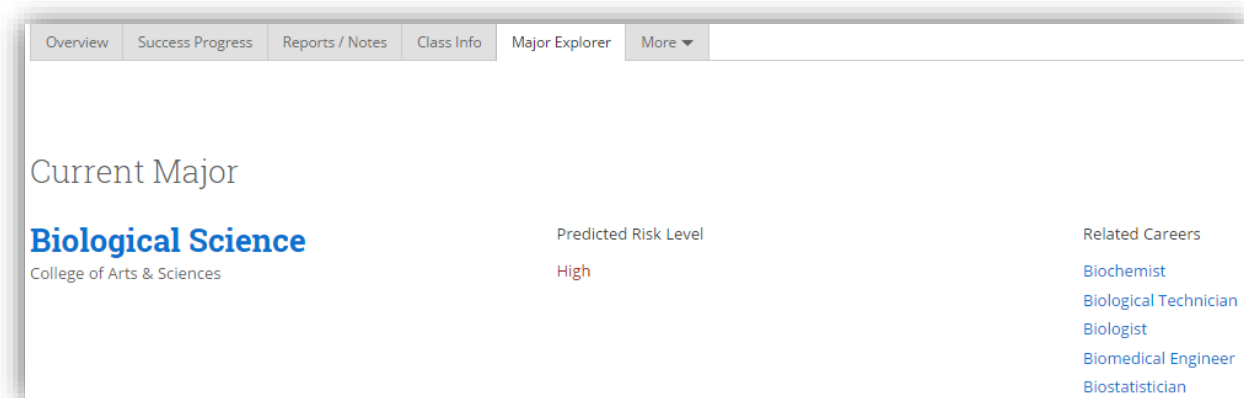
Notes About Student- All Notes that have been created for a student will be listed here. Advisors will be able to click the *Edit* link to make necessary changes to any note.

Major Explorer (Coming in Fall 2022)

The Major Explorer uses the advising application's predictive analytics model to guide student and user decisions about major decisions. Because many users and students will be curious about how Major Explorer does this, we have included a brief explanation of how predictive modeling works in this case.

The Major Explorer uses a predictive algorithm to generate information about whether a course of study is a good fit for the student, attempting to find the majors where the student has the highest chance of graduating. To do this, the algorithm analyzes basic data from the student information system. Items like GPA and credit accumulation start to determine the degree to which a student is at risk. Additionally, student coursework is analyzed to determine the level of skill a student has demonstrated in a content domain such as the humanities, STEM courses such as biology and mathematics, business and economics, et cetera. The student's skills are matched to their current major. Risk is mitigated when their skill strengths create a high match with the skills needed to excel in the major.

Finally, Major Explorer generates a high/moderate/low risk level that estimates how likely the student is to complete the major. Red suggests that without intervention, the student will have the most challenge in completing the major. Yellow suggests the student is statistically more likely to complete these majors, but there is more challenge for the student than a major with a green indicator. Green indicates majors the student will have the least challenge completing overall.



The screenshot displays the Major Explorer interface. At the top, there is a navigation bar with tabs for Overview, Success Progress, Reports / Notes, Class Info, Major Explorer (selected), and More. Below the navigation bar, the current major is listed as **Biological Science** under the College of Arts & Sciences. The Predicted Risk Level is shown as **High** in red text. To the right, under Related Careers, a list of careers is provided: Biochemist, Biological Technician, Biologist, Biomedical Engineer, and Biostatistician.

Recommended majors are shown in order beginning with the best match according to risk. Students who are at moderate or high risk in one major may not have a low-risk match because the factors determining their risk (GPA, credit accumulation, etc.) are applicable to all majors. Major Explorer provides other options to guide a student toward a major, including filtering by majors available in a college or searching directly for a major or career. Clicking on a major name will take the user to a page that describes the major and shows careers related to the major. Additionally, users may search for majors not shown on the page for the student to investigate. The student's current major will be listed first for comparative reasons. Major Explorer displays the risk color associated with the student's likelihood to graduate in the major for each major on the page.

The career information is provided by Burning Glass, a leading career information provider and Student Success Collaborative partner. Users can also use the search box to search for related careers as well as majors to compare. Clicking on a related career will share more information about the career and national hiring statistics.

Related Careers

[Account Executive](#)

Manages communications with business clients
Promotes products developed specifically for a c

[Account Manager / Representative](#)

Manages client accounts for a company. Develops
marketing services or financial services such as b

Campaigns

Setting up Appointment Campaigns

Navigate Appointment Campaigns enable the advisor to request that specific students select a specific date and time in which to schedule an appointment. This feature is commonly used when an advisor must meet with all of their students at least once per term.

The screenshot shows the NAVIGATE interface for managing campaigns. The 'Appointment Campaigns' tab is active. A table displays a campaign named '2022 Fall Advising' with a 'Resume' button and a 'Delete' button. The 'Actions' sidebar on the right provides options to create a new campaign of various types.

To begin a new appointment campaign:

Step 1- Click “Appointment Campaigns” in the right-hand Quick Links section

Step 2- On the Campaigns page select “Appointment Campaign” in the right-hand Actions Section.

Step 3- Fill out the “New Invitation Campaign” window.

The 'New Invitation Campaign' form includes the following fields:

- Campaign Name:
- Campaign Type:
- Slots Per Time:
- Course or Reason:
- Begin Date:
- End Date:
- Appointment Length:
- Appointment Limit:
- Location:

Buttons:

Campaign Name-The name of the campaign only appears to the advisor. This needs to be a name that makes sense to you.

Campaign Type- Select from drop-down list.

Slots per Time- Select how many attendees you would like to allow for every appointment time. If doing individual advising, select "1". If leading group advising, a workshop, or tutoring session, select the number your session can accommodate.

Course or Reason- Select the course being addressed (if tutoring) or reason for the campaign (if advising).

Begin and End Date- Input the date range for which you want the students to make their appointments.

Length of the Appointment- Select the length you would like each appointment to last for this particular campaign from the drop-down list.

Appointments Limit- Select the number of appointments you want a student to schedule from the drop-down list. If you only want them to meet once during the campaign select "1", if you want them to meet more than that in the dates you define select the appropriate number of times.

Location- Select the location of where the appointment(s) will be held.

Step 4- Review campaign details and hit "Continue" (if you want to decide on students to add later, you may hit "Save and Exit" but your campaign is not complete at this time).

Step 5- Select recipients of your campaign. You have several ways to search for and select your students.

Invite All My Assigned Students- You may select all students currently assigned to you.

Advanced Search- Provides advanced search filters to find, and select, students.

Step 6- Check the "All" box at the top of the list if you want to include all students listed OR select individuals in the list by checking the box next to their names.

Step 7- Review selected students and select "Continue." **Note:** As the next page loads a bar will tell you how many students have been added to the campaign.

Step 8- Double-check selected students. If you wish to remove any students, check the box by their name, click the Actions drop-down menu and select "Remove Selected Users." If all students included are accurate, simply select "Continue."

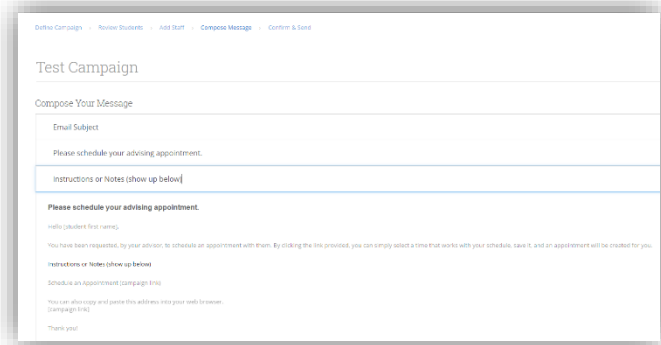
Step 9- Select yourself from the list of advisors. If multiple advisors are working on this campaign you may select other advisors as well. **Note:** An advisor must have availability set up in order to be selected for a campaign. You should set these up in the "My Availability" section and use "Campaigns" as the appointment type.

Step 10- Review selected advisor(s) and select "Continue."

Step 11- Compose the message that you will send to students in the invitation to schedule an appointment through the campaign.

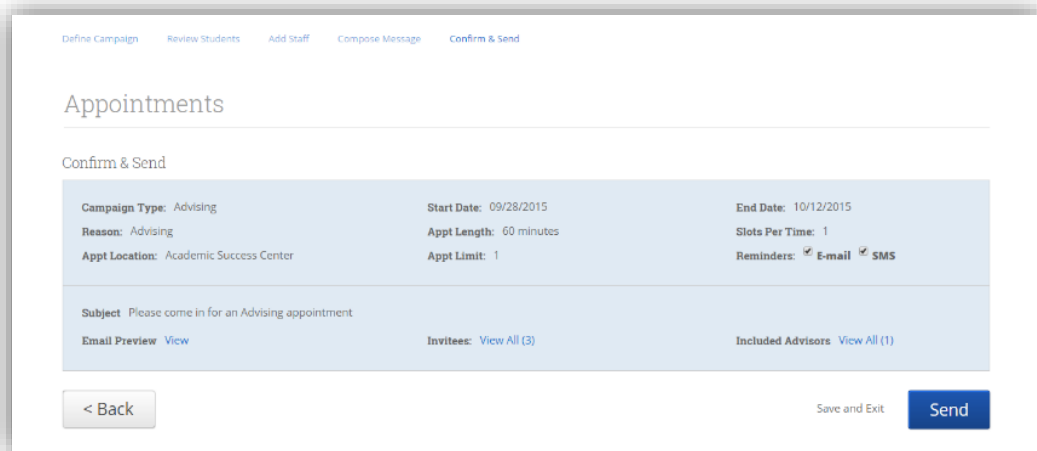
Email Subject- The topic will be the subject of the email going to the student.

Instructions or Notes- This will be your message to the student. **Note:** This screen will also give you a preview of what the invite will look like.



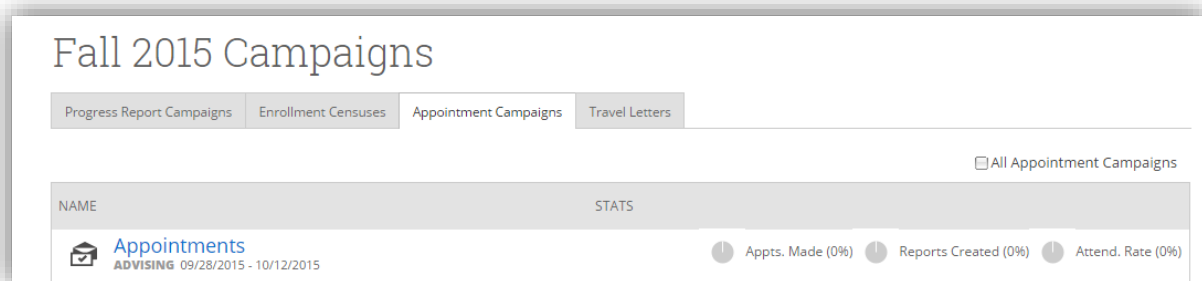
Step 12- Review your message and select “Continue.”

Step 13- Review your selected options before you start the campaign on the “Confirm & Send” page. Click Send when you are ready to email the invites to the selected students.

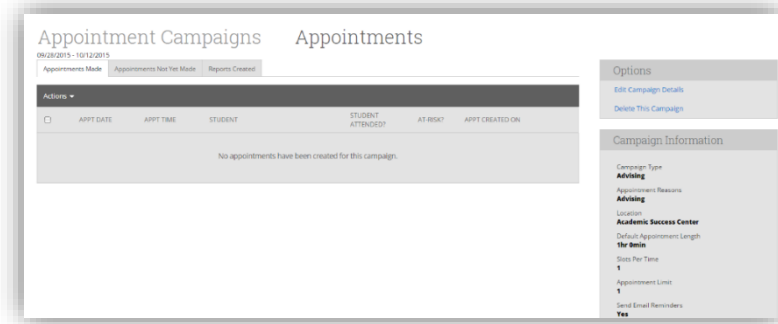


Managing a Campaign

The site gives you several tools to help manage your Appointment Campaign after you create and send it. To find this page Select the “Appointment Campaigns” tab on the Campaigns homepage.



Select the campaign you wish to review by clicking on the campaign name. A new window will open that will allow you to look at specifics of that campaign.

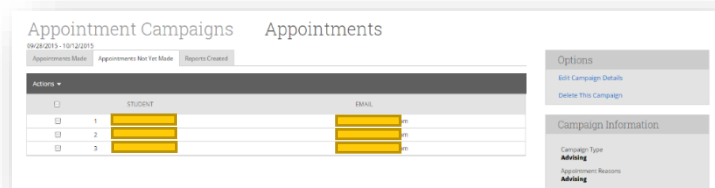


Appointments Made- This tab will let you see which students have made appointments. Not only can you view those students, but you can also “Send a Message” or “Add a Note” to those students by checking the box next to their name and selecting an option from the Actions drop-down menu.

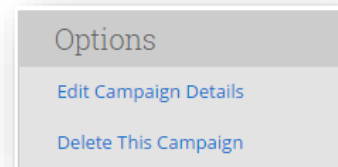
Appointments Not Yet Made- This tab will display those students who have not yet made their appointment(s). From the Actions drop-down menu, you may “Resend Appointment Request”, “Send a Message” or “Add Note” after checking the box next to the student you wish to communicate with.

Appointment Campaign Options-

In the options box on the right-hand side of the screen, you may make changes to the campaign you are viewing.



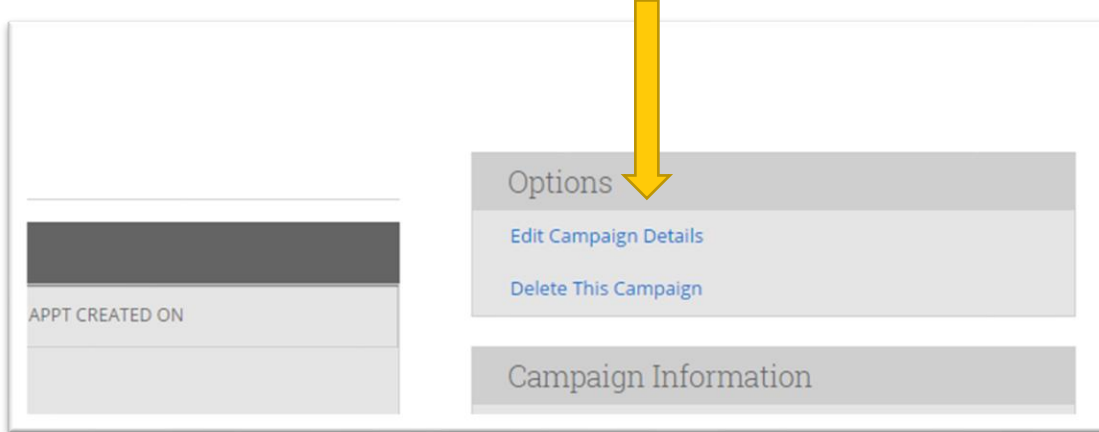
Edit Campaign Details- With this option, you can edit anything about the appointment campaign. When those changes have been saved, they will automatically apply to all students who still are required to make an appointment. Students who have already created their appointment(s) will not be affected by the changes.



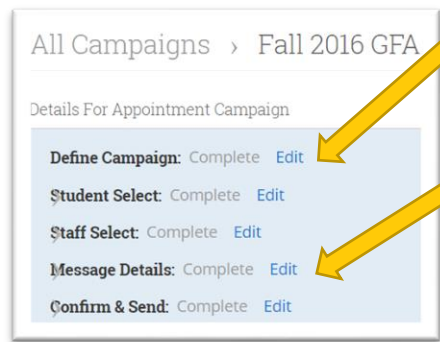
Delete This Campaign- You can use this option to delete an existing campaign. However, deleting this campaign will NOT remove any student appointments that have already been scheduled.

Editing a Campaign Step-by-Step

1. Click the Campaigns link or “Appointment Campaign” in the Quick Links
2. Click the title of the campaign you wish to edit
3. In the right-hand box labeled “Option” click “Edit Campaign Details”

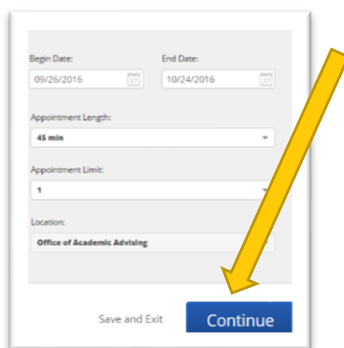


4. Click “Edit” next to the place you wish to start making changes
 - a. If changing the dates or extending your campaign click edit next to “Define Campaign”

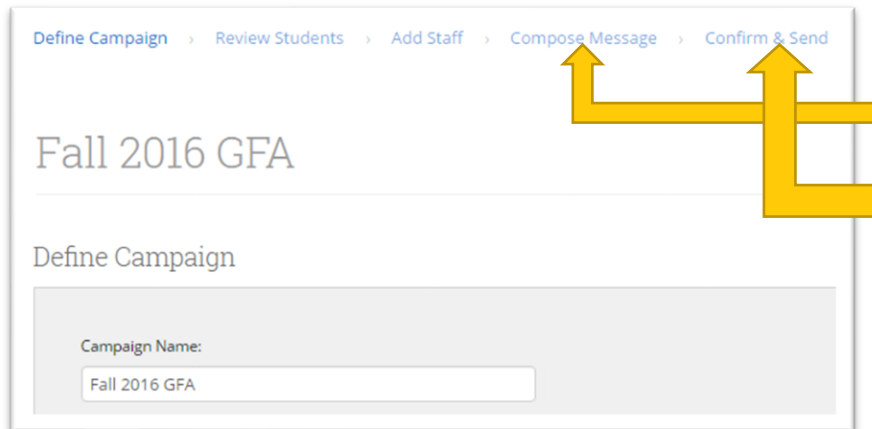


1. Start here if you want to edit you end dates and also edit your message details
 - b. If only editing you message click edit next to “Message Details” – if doing this skip to step 6

5. Select a new end date for your campaign, then do one of the following:
 - a. Click “Continue” if you wish to review students in the campaign (add and remove students also)
 - i. Then hit “Continue” once you have reviewed, review staff on the campaign and hit “Continue” again



- b. Click “Compose Message” across the top if you wish to edit your email
- c. Click “Confirm & Send” across the top if you wish to re-send your previous email without edits to students who have not yet scheduled their appointment



6. On the Compose Your Message page make any edits to your existing email that you wish students who have not yet scheduled to receive
 - a. Be sure to leave the {`$schedule_link`} in the email
 - b. Review the preview (please note, bullet points do not show up in the preview, but do appear in the email the student receives)
7. Click "Continue" and review overall campaign information
8. Click "Re-send" and then "Resend invitations" to send the new message to students who have not yet scheduled their appointment