

NAVIGATE

In 2017, CU Denver joined EAB's [Student Success Collaborative](#), a membership of more than 475 colleges and universities across the country working together to improve student outcomes and the student experience. The Student Success Collaborative combines technology, research, and predictive analytics to help institutions positively change outcomes with "at-risk" and off-path students, helping us reach our graduation and retention goals. As a part of the collaborative, we implement and utilize Navigate, a student success management system that brings together advisors, faculty, support staff, and students to create a coordinated care network that enables targeted intervention and proactive, strategic support for every CU Denver undergraduate student.

Navigate allows advisors, faculty, and staff the ability to:

- View a comprehensive student academic overview to provide quick, personalized guidance.
- Identify and prioritize students in need of support who require the most urgent attention.
- Maintain and share notes from student appointments and interactions.
- Set appointments with students and send email and text appointment reminders.
- Track advising appointments and walk-in traffic.
- Communicate with students directly from the Navigate platform.
- Run campaigns to reach out to students based on specific criteria and easily schedule and track appointments.
- Issue referrals on students that may benefit from additional support.

Staff Homepage

1. To access Navigate, click on (ucdenver.campus.eab.com) or copy and paste this link in a new browser.
2. Login in with your UCDenver PassportID credentials.
3. You will be brought to the page below:

The screenshot shows the Navigate Staff Homepage. At the top, there is a navigation bar with 'NAVIGATE', a search bar, and a dropdown menu for 'Terms' set to 'Spring 2021 CU'. Below the navigation bar, there is a sidebar with various icons. The main content area is titled 'Assigned Students For Spring 2021 CU' and features a table with columns for 'INDEX', 'STUDENT NAME', 'CATEGORY', and 'ABSENCES'. The table lists six students. To the right of the table, there is a sidebar with 'Options' (Edit User Settings, Send a Message, Schedule an Appointment, Record Course Attendance, New System Capture Email) and 'Contact Information'.

- Your first step should be to **Add Availability**.

Staff Home

Students | Appointments | My Availability | Appointment Queues | Appointment Requests

Available Times

The screenshot shows the 'Available Times' section. It features a table with columns: 'DAYS OF WEEK', 'TIMES', 'DATES', 'LOCATION', 'PURPOSE', 'CARE UNIT', and 'PERSONAL LINK'. The table is currently empty, displaying a message: 'No available times have been listed. To add a time, click the "Add Time" button.'

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

Setting up Availability

Specify available days of the week that you are active for this availability.

Adds your availability to an embeddable link. Students can use this to schedule with you directly.

Specify the Meeting Type- In Person, Phone, or Zoom. You must include at least one Meeting Type.

Specify the services available during this availability.

Allows you to include additional instructions for students.

Specify the number of students who can schedule for the same appointment slot.

MODIFY AVAILABILITY

When are you available to meet?

Mon Tue Wed Thu Fri Sat Sun

From: 8:00am To: 5:00pm
All times listed are in Mountain Time (US & Canada).

How long is this availability active?
Forever

Add to your personal availability link?
 Add this availability to your personal availability link?

What type of availability is this?
Appointments Drop-ins Campaigns

Meeting Type
In Person Phone Zoom

Care Unit
Academic Advising

Location
School of Education & Human Development

Services
Please select services

URL / Phone Number

Special Instructions for Student
B I [bulleted list] [numbered list] [undo] [redo]
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

Cancel Save

Set the times that you will be available for appointments.

Select from "term", forever, or a range of dates.

Select the type of appointment availability- Appointment, Drop-in, or Campaign.

Select your Care Unit and Location.

Include a Zoom link for virtual appointments or a phone number for phone appointments.

Save and publish the availability, then you're all set!

Calendar Sync

Migrating Calendar Sync to Graph API

This is a set of instructions for how to sync or resync your calendar once your institution has migrated to Graph API from EWS.

Setting Up Calendar Sync for a New User

This section explains how a new user syncs their calendar. Only sync one professional calendar to Navigate.

Steps

Select the calendar icon in the left navigation pane, then select the **Settings and Sync** button.



On the My Calendar page, select the **Settings and Sync** button.



Figure 1. My Calendar page with Settings and Sync button visible



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

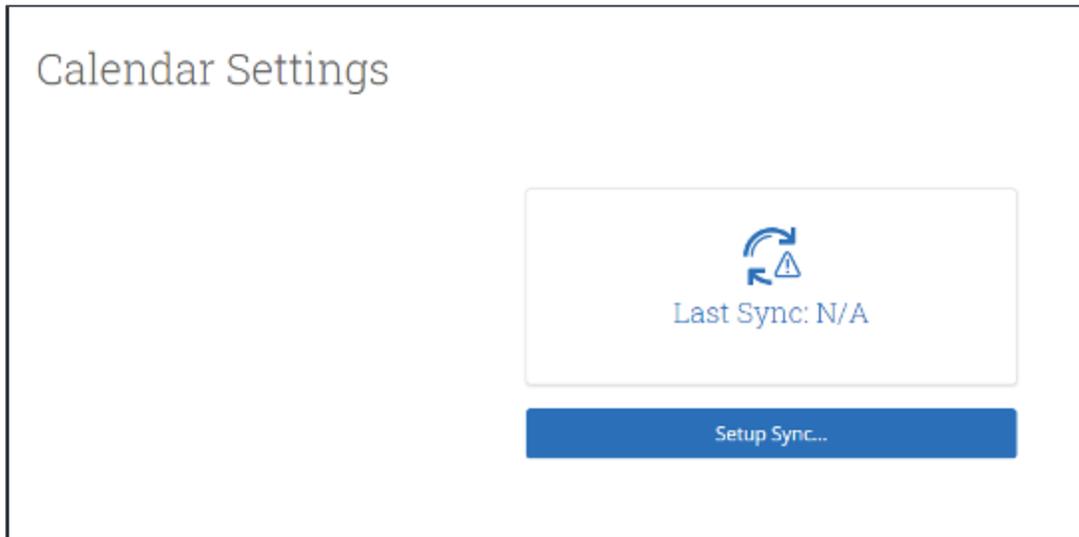


Figure 2. Calendar Settings page when no sync has been set up

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.

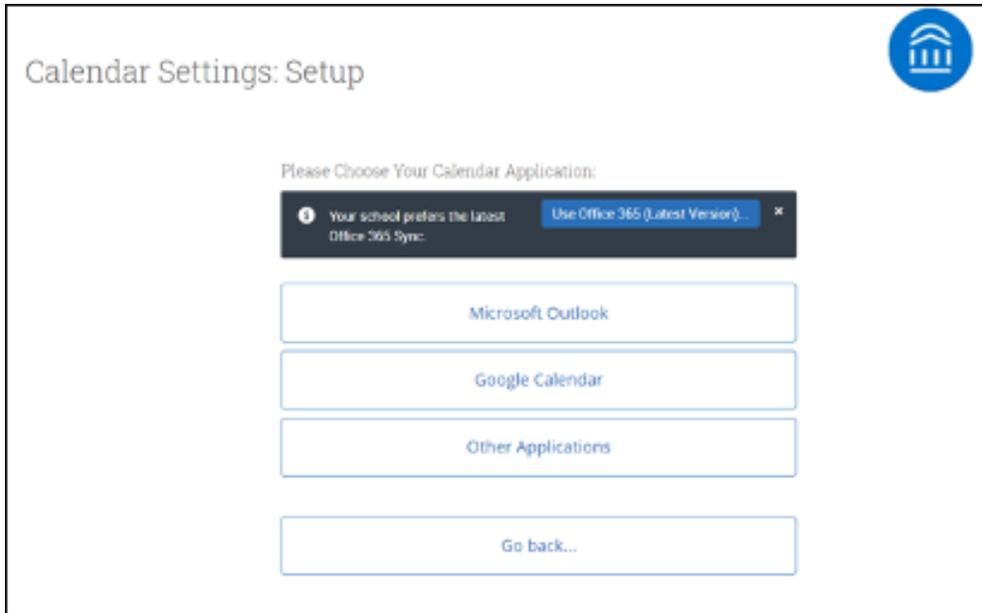


Figure 3. Calendar Settings page with button to start new sync

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.

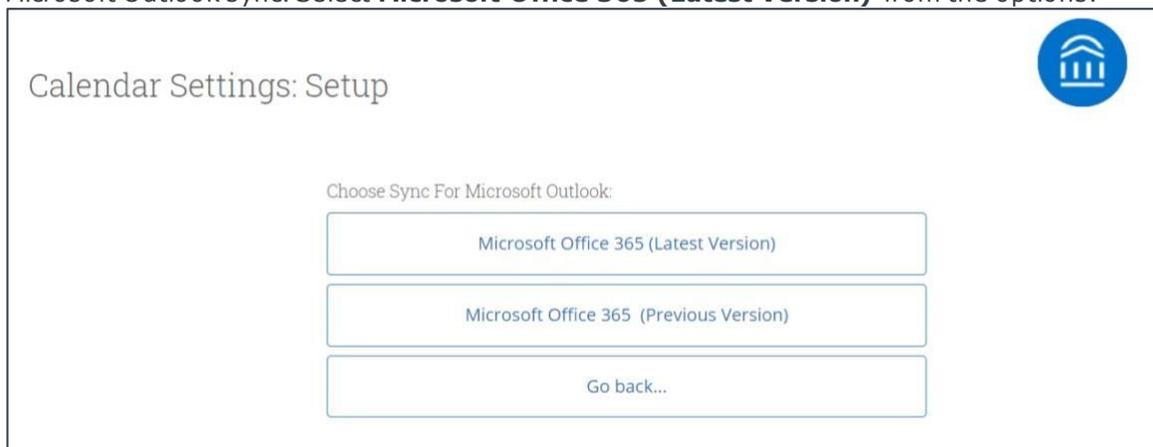


Figure 4. Selecting Outlook sync from list of Microsoft Outlook options

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.

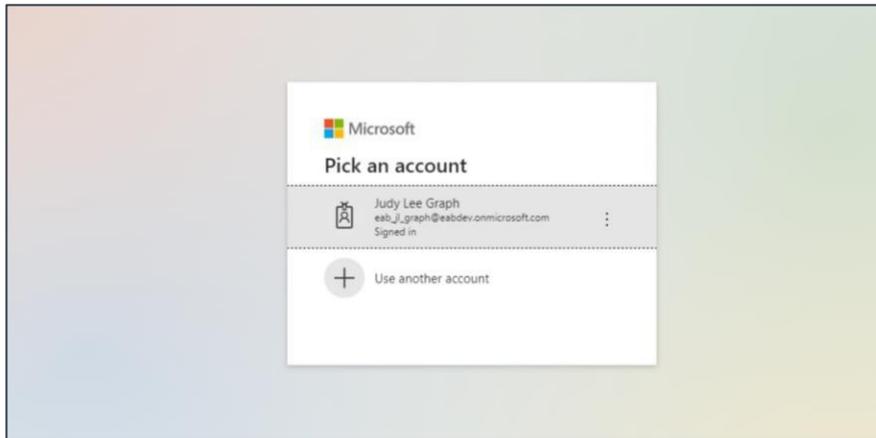


Figure 5. Microsoft login and authorization page

If you log in successfully, you see a page requesting permissions.

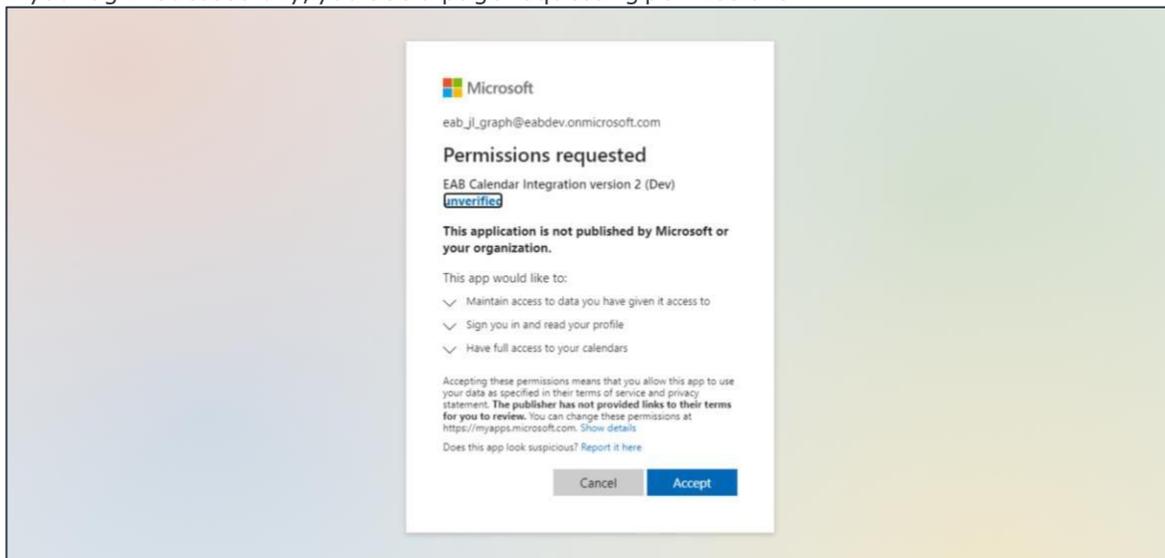


Figure 6. Page requesting permissions for new calendar sync

Select **Accept**. The page redirects to the Navigate Calendar Settings page, with a success message and information about the sync on display.

Sometimes an error will occur between CU Denver's SSO Login and Graph API, resulting in an error. In this event please do the following.

- 1) Open Office.com in your browser
- 2) Login to your UC Denver account
- 3) You will likely be asked to complete your sign-in using Duo
- 4) Once you are completely signed in via Office.com then
- 5) Open Navigate
- 6) Open your Calendar page
- 7) Attempt to authorize for Office365 (Latest Version)

Student Profile: At-A-Glance Tabs

The student profile contains information about the student and their academic performance. The information available helps to proactively identify students “at risk” of not graduating in their major. Advisors can gather a great deal of information as they move along the information tabs.

- Important academic information in a quick and easy-to-access format
- Allows for more in-depth conversations during advising appointment Student View slider – when sharing screen with student, turn the “Student View” on



Overview: You can learn a great deal about the student prior to their arrival to your appointment in 30 seconds – EAB calls this the 30 second gut check. Jot down notes about the data points on the student profile that you can use to prepare for advising appointments and learn more about your students’ success and progress.

Success Progress: The Success Progress tab details the success markers the student has completed, missed, or that are upcoming. Success Markers are important courses in a student’s major that indicates their progress toward success in that major. There are also charts to visually see GPA and credit trends along with a table of the data points.

History: This page shows any reminders you may have set to follow up with the student on as well as the various appointments the student has had with you or other advisors and offices on campus and any notes or reports filed.

Class Info: The class info tab has information that you likely would have looked for in Campus Connection. The classes that the student is currently enrolled in as well as the transcript information for the student that shows semester by semester enrollment. The bottom of the page shows the students’ ACT scores and any other placement exam score information.

Major Explorer: Additional majors at NDSU that based on risk score, students have shown previous success in earning their degree.

More: Calendar, appointments, conversations

Categories: Information brought in from the Student Information System to better help you identify your students for outreach, interests, and advising

The student profile page also displays the current major for the student, any second majors, the student ID and contact information, as well as their current academic classification and term of most recent enrollment.

Scheduling Individual Student Appointments

Step 1. Search for the student. You can use the student's name, ID number, or email address.



Step 2.

On the right side of the screen, locate the quick actions link and select "Schedule an Appointment"

3.

Step 3.

Select filters for the appointment. These must match the filters the advisor selected when setting up their availability. If not, the advisor may not appear as an organizer.

Schedule Appointment

Filters

Care Unit:

Location:

Service:

Course:

Comments:

2.

Staff Alerts 0

I want to...

- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report on Appointment
- Create Request for Appointment
- Schedule an Appointment
- Add to Watch List

Select An Organizer

Select a Date

June 2019

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						

4.

SELECT	ORGANIZER	AVAILABLE TIMES
<input type="radio"/>	Carrington, Jaimie	For: Campaigns Mon, Wed-Thu 8:00am-5:00pm
<input checked="" type="radio"/>	Steepe, Stacy	For: Appointments Tue-Thu 8:00am-5:00pm

Step 4. Select the advisor you want, the meeting length, and a time that works for the student.

Choose A Time To Meet

Length: ← Availabilities: ?

TIME SLOT	06/16 (SUN)	06/17 (MON)	06/18 (TUE)	06/19 (WED)	06/20 (THU)	06/21 (FRI)	06/22 (SAT)
10:00am - 10:20am		CONFLICTS	0/1	CONFLICTS	0/1		
10:20am - 10:40am		CONFLICTS	0/1	CONFLICTS	0/1		
10:40am - 11:00am		CONFLICTS	0/1	CONFLICTS	0/1		
11:00am - 11:20am			0/1	0/1	0/1		
11:20am - 11:40am			0/1	0/1	0/1		
11:40am - 12:00pm			0/1	0/1	0/1		
12:00pm - 12:20pm			0/1	0/1	0/1		
12:20pm - 12:40pm			0/1	0/1	0/1		

Save Appointment

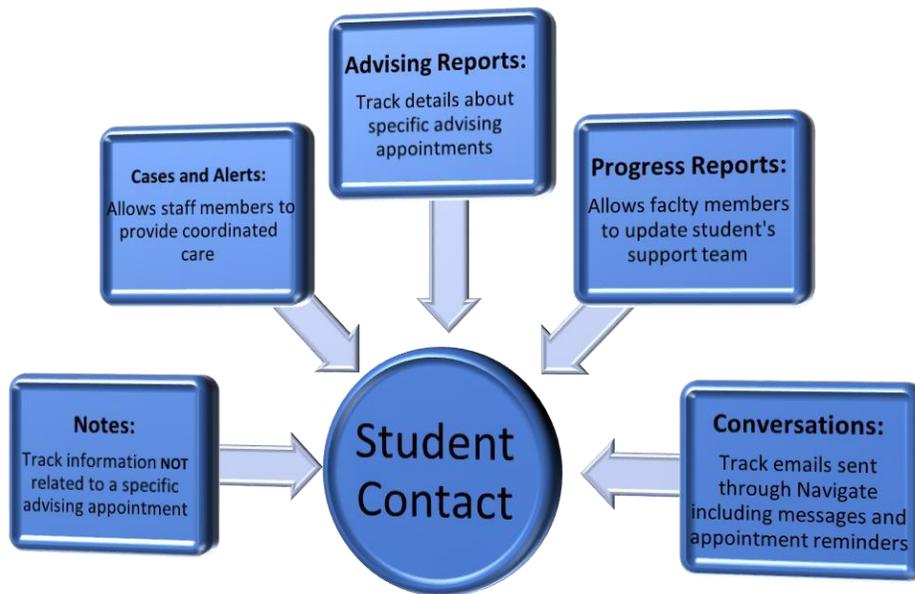
Remember to save!

Tracking Student Contact

“Advising Reports” and “Notes” allow faculty and staff to create, store, and share academic information about a student. Notes are accessible across campus by faculty, advisors, and student support staff. While students do not have access to their notes, they are always able to request their information. Benefits to widely accessible notes include improved communication, coordination, efficiency, transparency, and a more personalized student experience in advising.

Benefits of shared notes:

- Help advisors and other student support staff communicate and provide consistent, coordinated service.
- Create an “institutional memory” of contacts and recommended actions.
- Personalize the advising experience by refreshing the advisor’s recollection of previous conversations.



The Family Educational Rights and Privacy Act (FERPA) entitles students to access any notes considered part of their academic record. Any notes completed in NAVIGATE advising platform are considered part of a student's academic record and are accessible by students, open records requests, and court subpoenas.

Advising Reports and Notes

There are two primary forms of documentation in Navigate. They are the **Advisor Report** and the **Note**.

A **Note** is like an electronic sticky note. It is information you want to associate with a particular student but isn't necessarily a formal documentation of a meeting you had with them. Common examples are name pronunciations, preferred pronouns, forms or other documents, logistical information (ex. student commutes several hours to class), and any other useful information that might be helpful for someone advising the student to know.

To add a Note, select **Add a Note on this Student** from the box on the right-hand side:

- The text field is where you'll enter most of your information.
- The **Note Reason** can help with organization of notes for reporting purposes.
- The **Visibility** allows you to hide this note from other advisors by selecting **{your name} Only**. Please be aware that even a note with restricted visibility is subject to FERPA regulations.

The Appointment Report is opened by selecting "Report on Advising".

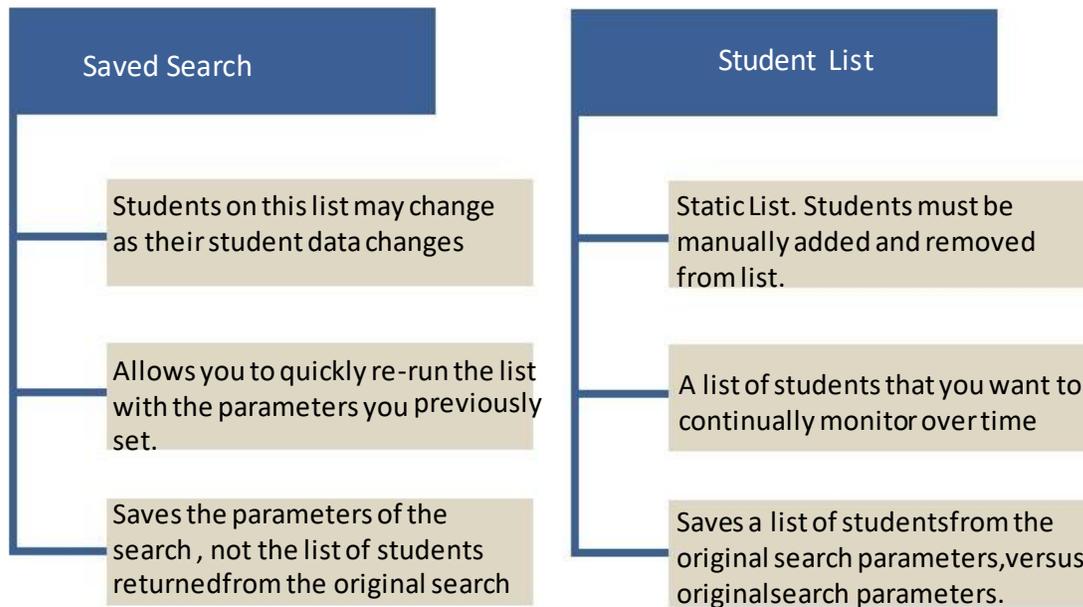
- The **Appointment Details** field is where you will document the reason you met with the student, the type of appointment, and when & where the appointment occurred.
- The **Attendees** field is where you will mark when the student arrived and departed. You may also mark the student as a **No-Show**.
- The **Appointment Summary** is the text box where you will enter the summary of your meeting with the student.
- **Report Details** are customizable by institution and is not required to complete before saving.

Advanced Search

Navigate stores current student information- including their historical engagement with CU Denver student data- and provides an easy way to apply multiple filters to query desired information. You can locate information that in the past may have taken a formal data request.

1. Select the “Show Advanced Filters” box in upper right corner to see additional search fields.
2. Enrollment Term – indicates the term’s data you are searching by.
3. My Students Only – search parameters will only return students that are assigned to you as their advisor
4. Include Inactive – the search defaults to only include students active in the term in which you are searching. If you select “Include Inactive” you will then include students from past terms as well
5. Search and view your list of students that matched your parameters
6. From the list, you may perform different actions: you can send the student an email to schedule an advising appointment, save the search, or export the results to Excel to work offline.

You may save two types of lists of students:



Practice: Create one advanced search with your students that is of interest to you.

Example: Find all currently enrolled students assigned to you with 3.5 cumulative GPA and above.

- Select Show Advanced Filters
- In “Performance Data” area
- enter 3.5 as Min Cumulative GPA
- Select “My Students Only” near the search button -Search