



Division of Student Success

Navigate

Navigate is a web-based tool by the Education Advisory Board (EAB) to coordinate, target, and report on advising, tutoring, and other student success services. These functions allow WCU to have a comprehensive student success solution that brings student support systems and analytics to aid in retention and graduation rates. You can access Navigate through your myWCU homepage. In the “Quick Links” box there is an “Advising/Tutoring” website link. This link will automatically log you into Navigate. The system will be updated every night. Please call the Advising Center at 828-227-7753 if you have any questions.

Your homepage

1) Term

- a. You can change the term, so you can see the classes for which the student is registered, during that term.

2) Quick Search

- a. Using the magnifying glass on the top right corner, you can search by the student’s ID number, name or Catamount email. Navigate uses the first name as it appears in Banner (SPAIDEN). If a student goes by their middle name, you should search by their first name.

3) Help Center

- a. You can view training videos and articles with detailed information about how to use Navigate.

4) User Role

- a. By clicking on the down arrow, you are able to change your role between advisor and professor.

5) Upcoming Appointments tab shows you who has made appointments

- a. This tab will display date, time, name of student, and a comment if the student wrote one.

6) My Availability tab is where you create open appointments that students can schedule with you.

- a. These appointments can be set for a date range, certain days, and certain times.

7) Advisee list

- a. If a student does not show up on this list, it is because they might not be assigned correctly within Banner or they are not active students for the current term.

8) Issue Alert

- a. This button is our Issue Alert system. You can report a student from your homepage, and from the student’s homepage.
 - i. The academic reasons will be sent to the Professional Advisor. The non-academic reasons will be sent to Student Crisis Response Team within Student Affairs.

9) Appointment Campaigns function allows you to schedule appointments with multiple students at one time.

- a. You can now schedule appointments during advising day without the headache of time conflicts.

Advisor's Homepage

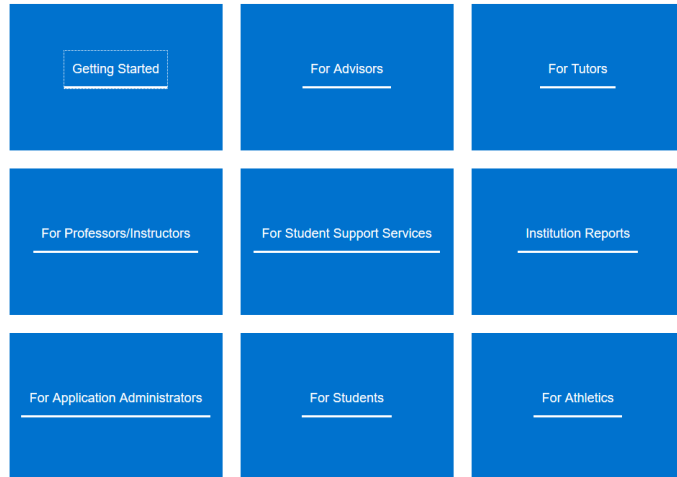
The screenshot shows the Advisor's Homepage interface. At the top, there is a 'NAVIGATE' menu with icons for home, mail, and calendar, and a 'Quick Search' bar (2). The Western Carolina University logo is in the top right (3). The main content area is titled 'Staff Home' (4) and includes tabs for 'Students', 'Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. The 'Appointment Queues' tab is active (5). Below this, the 'Assigned Students' section has a 'List Type' dropdown set to 'Assigned Students' (1) and a 'Term' dropdown set to 'Fall 2022 (Default Ter...)' (6). A table of assigned students is displayed with columns for Name, ID, Student List, Cumulative GPA, Predicted Support Level, Category, At Risk?, and Earned Credits. The table contains five rows of student data. A pagination bar at the bottom of the table shows 'Previous', '1', '2', '3', '4', '5', '...', '8', and 'Next' (7). On the right side, there are three sections: 'Actions' with a link 'Issue an Alert' (8), 'Quick Links' with various utility links, and 'Upcoming Appointments' with a calendar icon and a link to 'Change Major/Minor With Hailey Thompson 10/06/2022' at 3:20pm ET, including a 'Support' button.

*The numbers on the image above correspond to the numbers on the previous page.

Help Center

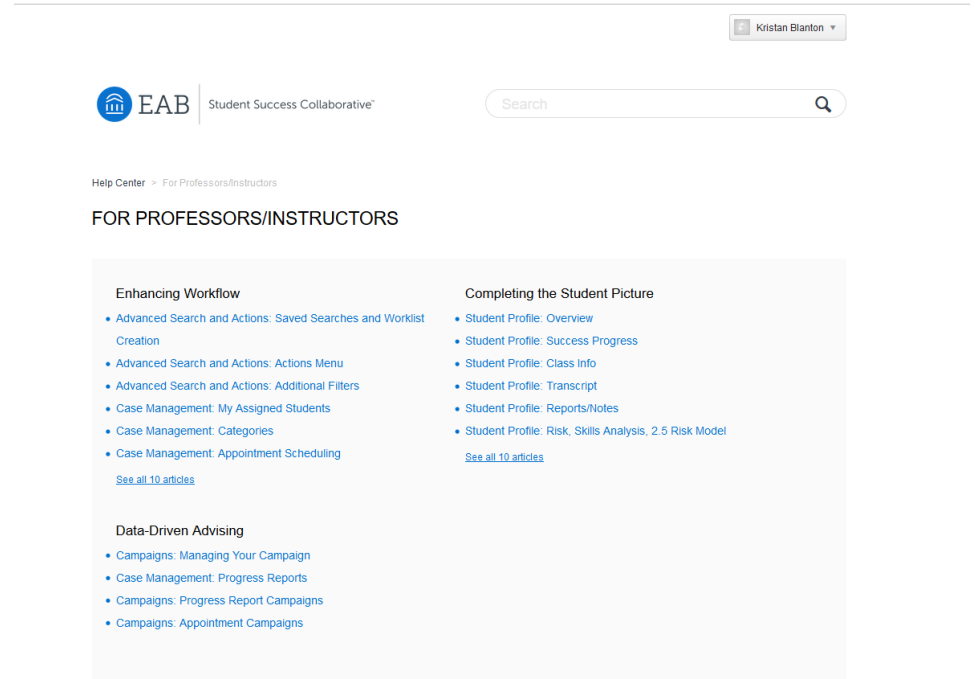
You can view training videos and articles with detailed information about how to use Navigate. Click on the “?” on the top right-hand side for the Help Center.

HELP CENTER



Promoted articles

[Our Training Philosophy: Getting Started in the Help Center](#)



Student's Profile Page

1) Homepage

a. Overview tab

- i. At a glance, you will be able to see the likelihood that a student will be successful in their current major. (Poor grades, missed success markers, and Cumulative GPA). Success Markers have been put in place by WCU's Department Heads and Program Directors.

b. Success Progress tab

- i. Shows the trend of the student's progress at WCU in graph form.

c. Reports/Notes tab

- i. This will show you any past notes on the student.

d. Class Info tab

- i. This is the student's schedule based on the current term.
- ii. MID = 5th week grades and final grades are pulled from Banner.
- iii. You can view their academic transcript from WCU and transfer coursework.

e. Major Explorer tab

- i. Information about their predicted risk level in multiple majors.

f. More tab

- i. Your appointment calendar through Navigate.
- ii. Study Hall- this is required for certain student athletes.
- iii. Conversation- This shows any communication with the student through Navigate.

2) Actions Box

a. Message Student

- i. This sends an email to the student's Catamount email. It will show a Navigate address as the sender, not your WCU email address.

b. Add a Note on this Student

- i. Record notes about student meetings and attach documents.

c. Add a Reminder to this Student

- i. You can set a reminder on a student and can view it under the student's Report/Notes tab.

d. Schedule an Appointment

- i. You can schedule an appointment with a student without creating availability for the student to see

Example of a Student's Homepage

WESTERN CAROLINA UNIVERSITY

NAVIGATOR Quick Search

1

2

Western Carolina UNIVERSITY

Staff Alerts 0

I want to...

- [Message Student](#)
- [Add a Note on this Student](#)
- [Add a To-Do to this Student](#)
- [Report on Appointment](#)
- [Create Request for Appointment](#)
- [Schedule an Appointment](#)
- [Add to Student List](#)
- [Issue an Alert](#)

Edit User Settings

[Upload Profile Picture](#)

Impersonate User

Active Appt Campaigns 0

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	Cumulative GPA
0	0	2	0	3.732

Total Credits Earned	Credit Completion % at this Institution	Predicted Support Level
66.00	88%	LOW View detail

Film and Television Production

Bachelor of Fine Arts
Coll of Fine & Performing Arts

Major History

STUDENT ID
920570580

ALTERNATE ID
kddustin1

CLASSIFICATION
Junior

MOST RECENT ENROLLMENT
Fall 2022

*The numbers on the image above correspond to the numbers on the previous page.

Saving a Note on a Student's Record

- 1) Type the student's name, ID number, or Catamount email into the Quick Search box in the top right corner.
- 2) Once you are on the student's homepage, click the "Add a Note on the Student" link on the right-hand side.
- 3) Type into the "Note" box.
- 4) Visibility?
 - a. If you check only the box with your name, then you are the only one who will be able to view the note.
 - b. If you check the box with the student's name, then the student will be able to view the note.
 - c. If you don't check either box, then any faculty/staff with access to notes on Navigate will be able to view it, but the student will not have access to the information.
- 5) Attach File
 - a. You can attach PDFs, Word documents, or emails into Navigate. Save emails in txt format.

***The numbers on the image below correspond to the numbers above.**

ADD A NOTE TO JONATHAN

Note (Required)

B I | | | | | |

3

Note Subject
Jonathan Alexander
Student, Tutor

Relations

Note Reason

Note URL

Visibility

Jack

Jonathan 5

Printed Student Report

Attach File No file selected.

4

6

Calendar Integration

- 1) Click on the Calendar icon on the left-hand side.
- 2) You will be able to see your calendar with the appointments at a glance. If you want to sync to your Outlook calendar, click on the **Settings and Sync** tab and click "Setup Sync."
- 3) You also have the option of syncing your **Outlook** calendar to your Navigate calendar by clicking on "Microsoft Office 365" Outlook information is shown as Busy blocks.

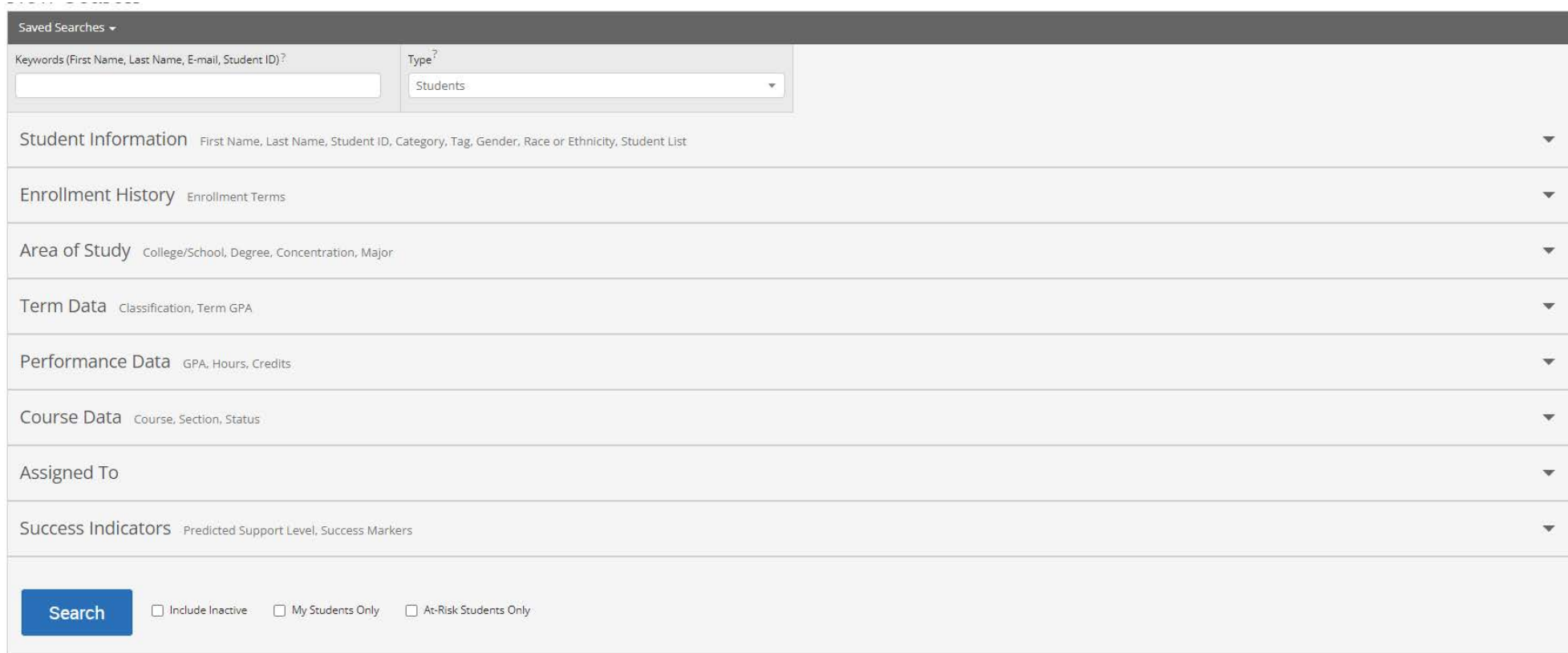
***The numbers on the image below correspond to the numbers above.**

The screenshot shows the 'My Calendar' interface in the NAVIGATE system. The interface includes a top navigation bar with the NAVIGATE logo and a search bar. Below the navigation bar is a sidebar with various icons, including a calendar icon highlighted with a purple box labeled '1'. The main content area displays 'My Calendar' with a 'Calendar View' tab and a 'List of Calendar Items' tab. There are filters for 'Course', 'Assignment', 'General', 'Busy', and 'Cancelled'. A 'Print Calendar (PDF)' button and an 'Add Calendar Event' button are also visible. The calendar is set to 'August 2019' and is displayed in a monthly view. The calendar grid shows dates from 28 to 31. A purple box labeled '2' is placed over the date '5' in the Monday column. In the top right corner, there is a 'Settings and Sync' link highlighted with a purple box labeled '3'. The Western Carolina University logo is also present in the top right.

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	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
1	2	3	4	5	6	7

Searching within Navigate

1) You can search all students in Navigate by clicking on “Advanced Search” See the different filters below.



The screenshot displays the search interface in Navigate. At the top, there is a "Saved Searches" dropdown menu. Below it, there are two input fields: "Keywords (First Name, Last Name, E-mail, Student ID)?" and "Type?" with a dropdown menu currently set to "Students". The main area contains a list of filter categories, each with a dropdown arrow:

- 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, Term GPA)
- Performance Data (GPA, Hours, Credits)
- Course Data (Course, Section, Status)
- Assigned To
- Success Indicators (Predicted Support Level, Success Markers)

At the bottom, there is a blue "Search" button and three checkboxes: "Include Inactive", "My Students Only", and "At-Risk Students Only". A purple box with the number "1" highlights the search icon in the left-hand navigation menu.

How to Create Availability

- 1) Click on the **My Availability** tab.
- 2) Click on the **Actions** drop down menu.
- 3) Select the **Add Time** option.
- 4) Choose the day of the week you would like to have open appointments.
 - a. You can choose to do multiple days at the same time if you want to have a recurring appointment time. (MWF 3-4pm)
- 5) Use the Scroll boxes to select the range of time for the appointments.
- 6) Click on the “Appointments” button.
- 7) Choose from the drop-down menu to select how long you would like to have these appointments open.
 - a. Forever, term only, or range of dates.
 - b. If you choose range of dates, then you will be asked the start date and the end date.
 - c. To create availability for one day only, select the same start and end date.
- 8) Click on "Care Unit" and choose "Advising"
- 9) Click on “Location” and choose “Faculty Office.”
- 10) Select the Student Services that are listed. (Faculty Advising Appointment or Virtual Advising Appointment).
- 11) Input your contact information in the “URL/Phone Number” if you wish to do so.
- 12) Lastly, click the blue “Save” button.
- 13) You can then view your availability under the **My Availability** tab.

The screenshot shows a web interface for a staff member's home page. The main content area displays a table titled "Available Times" with columns for "DAYS OF WEEK", "TIMES", "DATES", "LOCATION", and "PURPOSE". The table lists several appointment slots, some of which are highlighted in red. Overlaid on the right side of the screen is a modal dialog box titled "ADD AVAILABILITY". The dialog box contains the following fields and options:

- A note: "All times listed are in Eastern Time (US & Canada)."
- A dropdown menu: "How long is this availability active? Please select a duration"
- A checkbox: "Add this availability to your personal availability link?"
- A section titled "What type of availability is this?" with three tabs: "Appointments", "Drop-ins", and "Campaigns".
- A "Meeting Type" dropdown menu with the instruction "Please select Meeting Types".
- A "Care Unit" dropdown menu with the instruction "Please select a care unit".
- A "Location" dropdown menu with the instruction "Please select a location".
- A "Services" dropdown menu with the instruction "Please select services".
- A text input field for "URL / Phone Number".
- A "Special Instructions for Student" text area.
- Buttons for "Cancel" and "Save".

At the bottom right of the dialog box, there is a small note: "All times listed are in Eastern Time (US & Canada)".

- a. If the availability is not open for today's date, it will show in pink and have an inactive/Edit hyperlink. Please note that students will still be able to see these appointments.

Times Available

Actions ▾						
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	SUBJECT	
<input type="radio"/>	Wed	4:00p-5:00p	July 20, 2016 to July 20, 2016	Advising Center- 2nd Floor One Stop	Registration For Appointments	Edit
<input type="radio"/>	Thu	3:00p-5:00p	July 21, 2016 to July 21, 2016	Advising Center- 2nd Floor One Stop	Transfer Issues, Academic Standing, Change Major/Minor, General, Registration , University Withdrawal For Appointments	Inactive/Edit

Directions for Students to Make an Appointment

Use these directions below to let students know how to make an appointment with you through Navigate.

1. Log into myWCU and click on the Advising/Tutoring link in the Quick Links box.
2. Click the blue "Get Assistance" button on the right-hand side of the screen.
3. Select the **Advising** appointment type
4. Select the Faculty Advising service under **Service**
5. Select a date and click "Find Available Time"
6. Select the office Advising Office (on the right) and the select your faculty advisor.
7. You will now see the Advisor's availability.
8. Select a time.
9. Click the time (in blue).
10. You will now see your appointment details. You can add additional comments or click to get a reminder by email or text. (Text reminders require you to enter your mobile number).
11. Click the "Schedule" button.

How to Find Tutoring Reports

Faculty have access to reports of their students' tutoring visits to the Writing and Learning Commons (WaLC). For reports of students' visits to the Math Tutoring Center (MTC), please contact the MTC Director (828-227-3830).

To generate a report for your entire class:

1. On the left-hand menu, click on **Reporting**.
2. Under **Tutor Reports**, click on Tutor Appointment Details.
3. Change the date range
4. Under **Course Data**, choose your course and section (you can only search one section at a time).
5. Click **Search**.
6. Under Actions, click on Export to Excel.
7. Click on the link to the Download Center to access your report (you can also access the Download Center from your Home page under Quick Links).
8. Please note that these reports include:
 - a. Cancelled appointments (listed in the **Reported duration** column).
 - b. No Shows (marked in the **Is no show** column).
 - c. Reported session durations (see note below under "Limitations of tutor reports in Navigate").
 - d. Tutors' notes under the Summary column.
9. For assistance with tutor reports, please call the WaLC at 828-227-2274.

Tutor Appointment Details Report

The screenshot shows the search interface for the Tutor Appointment Details Report. At the top, there are two tabs: "Standard User Type: student" and "Registered In: ENGL-202 Writing and Critical Inquiry (60)". Below the tabs is a "Search" button and a "Modify Search" link. Underneath, there is an "Actions" dropdown menu. At the bottom, there is a table header with columns: "TUTOR NAME", "TUTOR EXTERNAL", "STUDENT NAME", "STUDENT EXTERNAL", and "APPOINT".

Tutor Appointment Details Report

The screenshot shows the search interface for the Tutor Appointment Details Report with various filters applied. The filters include: "Keywords (First Name, Last Name, E-mail, Student ID)" with a text input field; "Enrollment Status?" with a dropdown menu set to "No Preference"; "Begin Date" and "End Date" with date pickers set to "07/05/2016" and "08/03/2016" respectively; "Tutoring Team:" with a dropdown menu set to "All"; "Tutor for Appointment:" with a dropdown menu set to "All"; "Student Information" with a link to "First Name, Last Name, Student ID, Tag, Watch List"; "Area of Study" with a link to "College/School, Degree, Concentration, Major"; "Performance Data" with a link to "GPA, Hours, Credits"; "Summer 2016 Data" with a link to "Classification, Term GPA"; "Course Data" with a link to "Course, Section, Status"; "Course?" with a dropdown menu set to "ENGL-202 Writing and Critical Inquiry" and a link to "Add More Courses"; "Section?" with a dropdown menu set to "60"; "Status" with a dropdown menu set to "Registered"; "Assigned To" with a link to "Advisor, Tutor, Coach"; and a "Search" button with checkboxes for "My Students Only", "Include Inactive", and "Ignore Term".

How to Look Up Tutoring Visits - Individual Students

1. In the search bar, type in the student's name or 920#, then click on their name.
2. You can also click on an individual student's name in your class roster or advisee list.
3. Click on **Reports/Notes** in the tab menu.
4. Scroll down to **Tutor Reports**.
5. Click on "Details" to the right of each visit to read tutors' summary notes.

Tutor Reports

DATE	REPORT FILED ON	COURSE	FOLLOW-UP	SUMMARY	
07/26/2016 11:30 AM	07/27/2016			Dylan came in with his fina...	Details

Limitations of Tutor Reports

1. Writing appointments do not automatically have courses assigned, so your student's writing appointments will only show up on tutor reports if the tutor assigns a specific class while writing their summary report. If you suspect that a student has gone to a writing tutor, but they are not listed in the class report, search for the student individually to see all his/her tutoring visits (see above).
2. All tutoring appointments are 30-minutes, so some students will have multiple appointments in one day. Make sure to look at the dates/times of each appointment to determine which sessions were actually one concurrent appointment.
3. Duration of appointments under the **Scheduled duration** column will always default to the appointment time (e.g. 11:00-11:30). Actual appointment durations reported by tutors (i.e. if the student left early or stayed late) will be listed under the **Reported duration** column but will not appear until the tutor has completed the report at the end of each week.

APPOINTMENT CREATED AT	BEGIN DATE TIME	END DATE TIME	SCHEDULED DURATION	LOCATION	ARRIVED AT	DEPARTED AT	REPORTED DURATION
07/22/2016 01:56 PM	07/25/2016 02:00 PM	07/25/2016 02:30 PM	30min	Writing and Learning Commons, Belk 207	07/25/2016 02:05 PM	07/25/2016 02:30 PM	25min

Appointment Campaigns

1. To begin, click **Campaigns** in the Actions of Quick Links menu.
2. Then click **Appointment Campaigns** and click "Add New."
3. You will then set the criteria for your Appointment Campaigns. All fields must be filled out.
 - a) **Campaign Name:** Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student.
 - b) **Care Unit:** Select the Care Unit the Appointment Campaign will be associated with.
 - c) **Location:** Select the location of where the appointment(s) will be held.
 - d) **Service:** Select the Student Service that will be associated with the campaign.
 - e) **Course or Reason:** Add the reason or associated course for the campaign here. This will only appear if the service is tied to a course.
 - f) **Begin and End Date:** These are the dates that you want students to start and stop making appointments for the campaign.
 - g) **Appointment Limit:** This will determine how many appointments you wish for the student to schedule during the campaign.
 - h) **Appointment Length:** This is where you define exactly how long the appointment will be. Durations begin at a 5-minute length and will be determined by your configuration.
 - i) **Slots per Time:** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.
 - j) **Allow Scheduling over Courses:** students will be able to schedule their own classes, and the classes of the staff member they are scheduling with, within the campaign date range.
4. After entering details on the define Campaign page, click **Continue**. Your next step is adding students. If you created this campaign directly from a Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.
5. You have ways to search for and select your students.
 - a) **Invite All My Assigned Students:** Adds all students assigned to you to the campaign.
 - b) **Advanced Search:** Use Advanced Search filters to find and select students. After starting the search, you will be presented with a list of students. Select the students you wish to add. Once finished, click **Continue** to move to the next page. You will be asked to review the students in the campaign. If these are correct, click **Continue**.
6. You will need to select yourself as staff for the campaign. You may also have the option to select additional staff to make them available for appointments based on the campaign.

Campaign Configurations

* Campaign Name Instructions or Notes for Landing Page:

* Care Unit: * Location:

* Service:

Appointment Configurations

* Appointment Limit: * Appointment Length:

* Slots Per Time:

Allow Scheduling Over Courses

Staff Reminders: Email Text Recipient Reminders: Email Text

Scheduling Window

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

* Start Date * End Date

Timeline

- Objective**
Pending Setup...
- Recipients**
Pending Setup...
- Staff**
Pending Setup...
- Welcome Message**
Pending Setup...
- Campaign Ends**
Pending Setup...

Support

NOTE: Staff will need to have availability defined before they can be added to an appointment campaign. **If you do not see staff you expected to have availability, make sure their calendars and availability are up-to-date.**

- Your next step is to compose the message that you will send to students. This invitation to schedule an appointment through the campaign will appear in a preview below the message and include information about how to use merge tags. **DO NOT REMOVE THE SCHEDULE LINK FROM THE EMAIL BODY.**
 - Fields used in the message composition are:

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

Instructions or Notes: This will be specific to the landing page students will be taken to when they click on the link in their email to choose the date and time of their appointment.

After you have finished composing your message, it's time to send out your campaign!

7. Review your campaign details, invitees, and advisors on this page. Click **Send** when you are ready to email the invites to the selected students.

Do you need to report a concern?

Western Carolina is committed to providing a safe and healthy campus environment for its students, faculty, and staff and offers a range of services to support physical and mental well-being of its community members.

You report a concern using this link for any of the reasons listed below:

<https://cm.maxient.com/reporting.php?WesternCarolinaUniv>

- Bias
- Conduct
- Pregnant & Parenting
- Reporting a Student Concern
- Sexual Misconduct – Title IX
- Student Complaints/Concerns/Ideas