



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

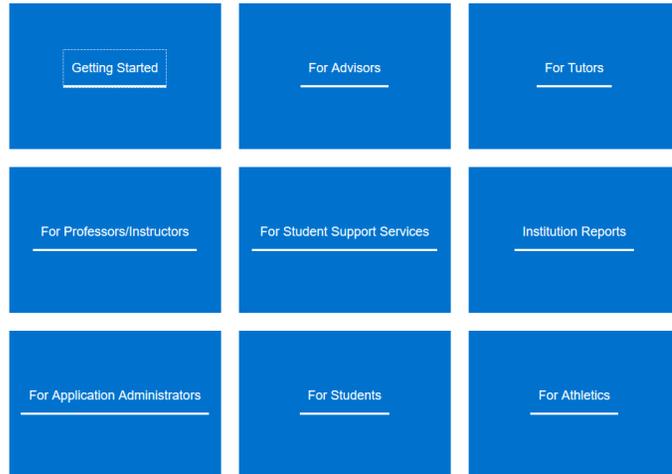
The screenshot shows the Advisor's Homepage interface. At the top left is the 'Campus Student Success Collaborative' logo. The main header area contains the title 'Advisor Home' (4) and a navigation menu with tabs for 'Students', 'Upcoming Appointments', 'My Availability', and 'Advising Center'. Below this is a section titled 'My Assigned Students For Summer 2016' (5) with a dropdown arrow (6). A table with columns for 'STUDENT NAME', 'ID', 'WATCH LIST', 'CUM. GPA', and 'PREDICTED RISK LEVEL' is shown, with a message 'No matching records found' (7) in the center. On the right side, there are three panels: 'Actions' with a link 'Issue an Alert' (8), 'Quick Links' with links for 'Appointment Campaigns', 'School Information', and 'Download Center for Reports', and 'Upcoming Appointments' with the message 'You have no upcoming appointments.' The top right corner features a search bar (1) set to 'Summer 2016', a search icon (2), a help icon (3), and a user profile icon.

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

Help Center

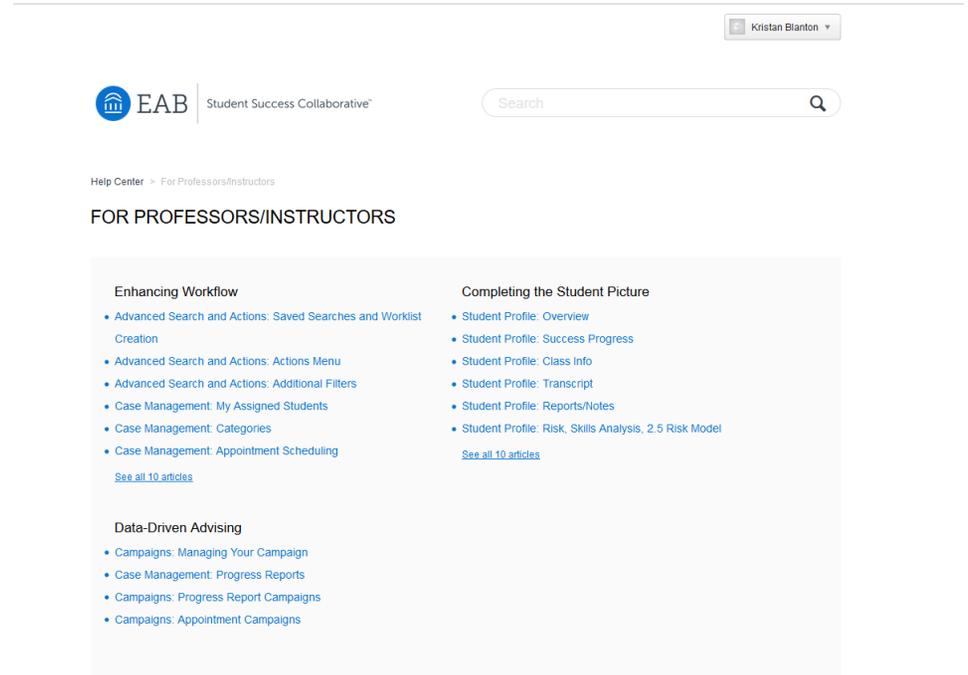
You can view training videos and articles with detailed information about how to use Navigate. Click on the “?” on the top right-hand side for the Help Center.

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

The screenshot shows a student's homepage with a purple sidebar on the left containing icons for home, messages, calendar, documents, charts, search, location, documents, and settings. The main content area has a navigation bar with tabs: Overview (selected), Success Progress, Reports / Notes, Class Info, Major Explorer, and More. A top header includes the 'Campus Student Success Collaborative' logo, a 'Summer 2016' dropdown, and search, help, and user profile icons. A 'Staff Alerts' panel on the right shows 0 alerts and a list of actions: Message Student, Add a Note on this Student, Add a Reminder to this Student, Report On Advising, Schedule an Appointment, and Issue an Alert. The main dashboard displays statistics: Course Grade D/F (0), Repeated Courses (0), Withdrawn Courses (0), Missed Success Markers (0), and Cumulative GPA (3.905). Below this, it shows Total Credits Earned (122.00), Credit Completion % at this Institution (100%), and Predicted Risk Level (Low). The student's name 'Film and Television Production' and college 'Coll of Fine & Performing Arts' are listed. Student ID is 920, Classification is Senior, and the most recent enrollment is Summer 2016. An additional role of 'Tutor' is shown. At the bottom, there are sections for 'Advisors' and 'Tutors'. Callout '1' points to the Overview tab, and callout '2' points to the Staff Alerts panel.

Campus Student Success Collaborative

Summer 2016

Overview Success Progress Reports / Notes Class Info Major Explorer More

1

2

Staff Alerts 0

I want to...

- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report On Advising
- Schedule an Appointment
- Issue an Alert

Course Grade D/F: 0

Repeated Courses: 0

Withdrawn Courses: 0

Missed Success Markers: 0

Cumulative GPA: 3.905

Total Credits Earned: 122.00

Credit Completion % at this Institution: 100%

Predicted Risk Level: Low

Film and Television Production
Coll of Fine & Performing Arts

STUDENT ID: 920

CLASSIFICATION: Senior

MOST RECENT ENROLLMENT: Summer 2016

ADDITIONAL ROLES: Tutor

Advisors

Tutors

Student Info

Age: 23
DOB: 11/05/1992
Address: APT 155-1B, The Summit At Cullowhee, Cullowhee, NC 28723
Email: !@catamount.wcu.edu
Home: 919-
Cell: 0
Work: 0

*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

Save Note Cancel

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 **Subscriptions** tab and click “Setup Calendar Integration.”
- 3) You also have the option of syncing your Outlook calendar to your Navigate calendar by clicking on “Setup Exchange Calendar Integration.” Outlook information is shown as Busy blocks.

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

NAVIGATE Summer 2019

My Calendar

Calendar View List of Calendar Items Settings and Sync

Course Assignment General Busy Cancelled

Print Calendar (PDF) Add Calendar Event

August 2019 today < day week month >

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 “Show Advance Filters.” See the different filters below.

New Search

Saved Searches ▾				1	<input checked="" type="checkbox"/> Show Advanced Filters
Keywords (First Name, Last Name, E-mail, Student ID) <input type="text"/>	Type? Students ▾	Enrollment Status? Enrolled ▾	Enrollment Term Summer 2016 ▾		
Student Information First Name, Last Name, Student ID, Tag, Watch List ▾					
Area of Study College/School, Degree, Concentration, Major ▾					
Performance Data GPA, Hours, Credits ▾					
Summer 2016 Data Classification, Term GPA ▾					
Course Data Course, Section, Status ▾					
Assigned To Advisor, Tutor, Coach ▾					
<input type="button" value="Search"/> <input type="checkbox"/> My Students Only <input type="checkbox"/> Include Inactive					

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 “Location” and choose “Faculty Office.”
- 9) Select the Student Services that are listed. (Faculty Advising Appointment or Virtual Advising Appointment).
- 10) Input your contact information in the “URL/Phone Number” if you wish to do so.
- 11) Lastly, click the blue “Save” button.
- 12) You can then view your availability under the **My Availability** tab.

The screenshot shows the NAVIGATE interface with the 'ADD AVAILABILITY' dialog box open. The background shows the 'Staff Home' page with the 'Available Times' section. The dialog box has the following fields and options:

- When are you available to meet?** (Days of the week: Mon, Tue, Wed, Thu, Fri, Sat, Sun)
- From:** 8:00am
- To:** 5:00pm
- All times listed are in Eastern Time (US & Canada).**
- How long is this availability active?** (Please select a duration)
- What type of availability is this?** (Appointments, Drop-ins, Campaigns)
- Care Unit:** (Please select a care unit)
- Location:** (Please select a location)
- Services:** (Please select services)
- URL / Phone Number:**
- Special Instructions for Student:**
- Buttons:** Cancel, Save, Edit

* 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 checked="" 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 Advising" button on the right-hand side of the screen.
3. Select the type of advising you are seeking. (Faculty Advising)
4. Select the reason for the appointment from the drop-down menu. (Faculty Advising Appointment)
5. Click the blue "Next" button.
6. Select the office Faculty Advisor's Office and the select your faculty advisor.
7. Click the blue "Next" button.
8. You will now see the Advisor's availability split between a Morning and Afternoon option. Use the arrow buttons to change the weeks
9. Click on the blue button for Morning or Afternoon and then select a time.
10. Click the blue "Next" button.
11. 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).
12. Click the "Confirm Appointment" 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 **Appointment Campaigns** in the Actions of Quick Links menu.
2. You will then set the criteria for your Appointment Campaign. 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.
3. 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.
4. 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 and then choose **Add Selected Users and Search for More** from the actions menu. 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**.
5. 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.

NAVIGATE Summer 2020

Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

Campaign Name:

Care Unit:

Location:

Service:

Begin Date: 05/20/2020

End Date: 06/03/2020

Appointment Limit: 1

Appointment Length: 5 min

Slots Per Time: 1

Allow scheduling over courses

Cancel Save and Exit Continue

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.**

6. 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.**
 - a) 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.