



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. The main content area is titled 'Staff Home' and includes tabs for 'Students', 'Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. Below these tabs, there are filters for 'Assigned Students', 'List Type' (set to 'Assigned Students'), 'Term' (set to 'Fall 2022'), and 'Relationship Type' (set to 'All Relationship Types'). A table of student records is displayed with columns for Name, ID, Student List, Cumulative GPA, Predicted Support Level, Category, At Risk?, and Earned Credits. The table lists five students: Aalaei, Dayyan; Ackerman, Victoria; Ackison, Aeliana; Agnew, Aerlie; and Aguilar, Marixa. A pagination bar at the bottom of the table shows 'Previous', '1', '2', '3', '4', '5', '...', '8', and 'Next'. On the right side, there are sections for 'Actions' (with a link 'Issue an Alert'), 'Quick Links' (with links like 'Schedule a General Event'), and 'Upcoming Appointments' (with an appointment for 'Change Major/Minor With Hailey Thompson' on 10/06/2022).

1. [Aalaei, Dayyan](#) 920613861 Initial Meeting 1.713 High Academic Standing: Academic Warning, Continuing, First Time FT Freshman 202180 No 22

2. [Ackerman, Victoria](#) 920611499 Initial Meeting 3.369 Low 1st Generation Student, Academic Standing: Good Academic Standing, Continuing, First Time FT Freshman 202180, Veteran No 28

3. [Ackison, Aeliana](#) 920623608 2.786 Low 1st Generation Student, Academic Standing: Good Academic Standing, Continuing, First Time FT Freshman 202180, Summer LC Catamount Gap, Two Concurrent Programs No 37

4. [Agnew, Aerlie](#) 920536548 S/U Outreach, SP 19 5 weeks, SP 19 11 weeks 2.333 Low Academic Standing: Good Academic Standing, Continuing, Veteran No 115

5. [Aguilar, Marixa](#) 920616264 Initial Meeting 2.333 Low 1st Generation Student, Academic Standing: Good Academic Standing, Continuing, First Time FT Freshman 202180 No 27

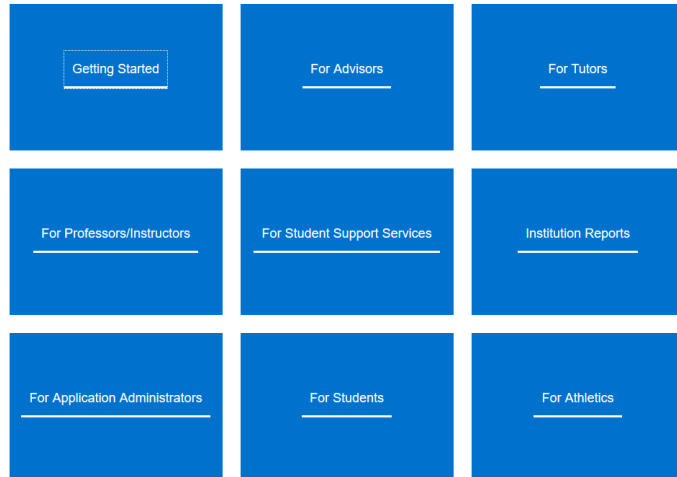
788 total results

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

Help Center

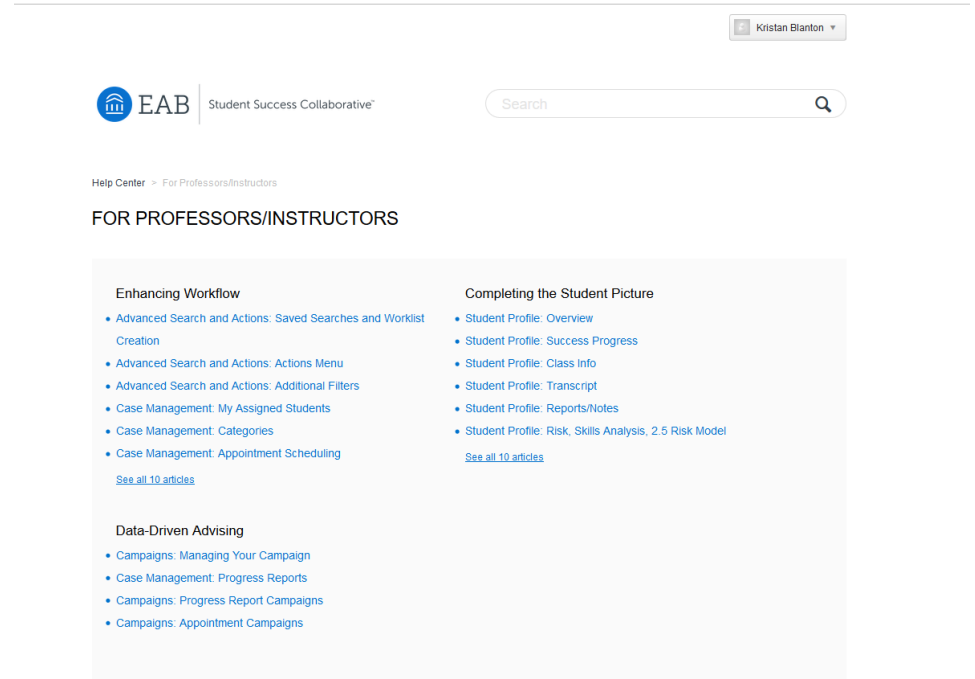
You can view training videos and articles with detailed information about how to use Navigate. Click on the “?” on the top right-hand side for the Help Center.

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 **1** Quick Search **2**

Western Carolina UNIVERSITY

Overview Success Progress Reports / Notes Courses Major Explorer More ▾

| | | | | |
|------------------|------------------|-------------------|------------------------|----------------|
| 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

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**

*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 Browse... No file selected. 4

6 Save Note Cancel

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, a search bar, and a dropdown menu for 'Summer 2019'. The main content area is titled 'My Calendar' and features a 'Calendar View' tab and a 'List of Calendar Items' tab. A 'Settings and Sync' link is located in the top right corner. Below the tabs, there are checkboxes for 'Course', 'Assignment', 'General', 'Busy', and 'Cancelled'. A 'Print Calendar (PDF)' button and an 'Add Calendar Event' button are also present. The calendar itself is for August 2019, showing a grid of days from Sunday to Saturday. The calendar is currently set to 'month' view. Three purple boxes with numbers 1, 2, and 3 are overlaid on the interface: box 1 is on the calendar icon in the left sidebar, box 2 is on a date cell in the calendar grid, and box 3 is on the 'Settings and Sync' link 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.

1

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 system interface. The main window is titled 'Staff Home' and has tabs for 'Students', 'Upcoming Appointments', 'My Availability', and 'Appointments'. The 'My Availability' tab is active, displaying a table of available times. The table has columns for 'SELECT', 'DAYS OF WEEK', 'TIMES', and 'DATES'. There are four rows of availability, each with a radio button in the 'SELECT' column. The first row is selected. The 'ADD AVAILABILITY' dialog box is open, showing the following fields:

- When are you available to meet?** with tabs for Mon, Tue, Wed, Thu, Fri, Sat, Sun.
- From** and **To** time selection fields (8:00am to 5:00pm).
- How long is this availability active?** dropdown menu (Please select a duration).
- What type of availability is this?** with buttons for Appointments, Drop-ins, and Campaigns.
- Care Unit** dropdown menu (Please select a care unit).
- Location** dropdown menu (Please select a location).
- Services** dropdown menu (Please select services).
- URL / Phone Number** text input field.
- Special Instructions for Student** text input field.
- Cancel** and **Save** buttons.

* 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 search box and "Enrollment Status?" with a dropdown set to "No Preference". "Begin Date" is set to 07/05/2016 and "End Date" is set to 08/03/2016. "Tutoring Team:" is set to "All" and "Tutor for Appointment:" is set to "All". The "Student Information" section includes "First Name, Last Name, Student ID, Tag, Watch List". The "Area of Study" section includes "College/School, Degree, Concentration, Major". The "Performance Data" section includes "GPA, Hours, Credits". The "Summer 2016 Data" section includes "Classification, Term GPA". The "Course Data" section includes "Course, Section, Status". The "Course?" dropdown is set to "ENGL-202 Writing and Critical Inquiry" and the "Section?" dropdown is set to "60". The "Status" dropdown is set to "Registered". The "Assigned To" section includes "Advisor, Tutor, Coach". At the bottom, there is a "Search" button and three checkboxes: "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.