Western Carolina UNIVERSITY

Division of Student Success

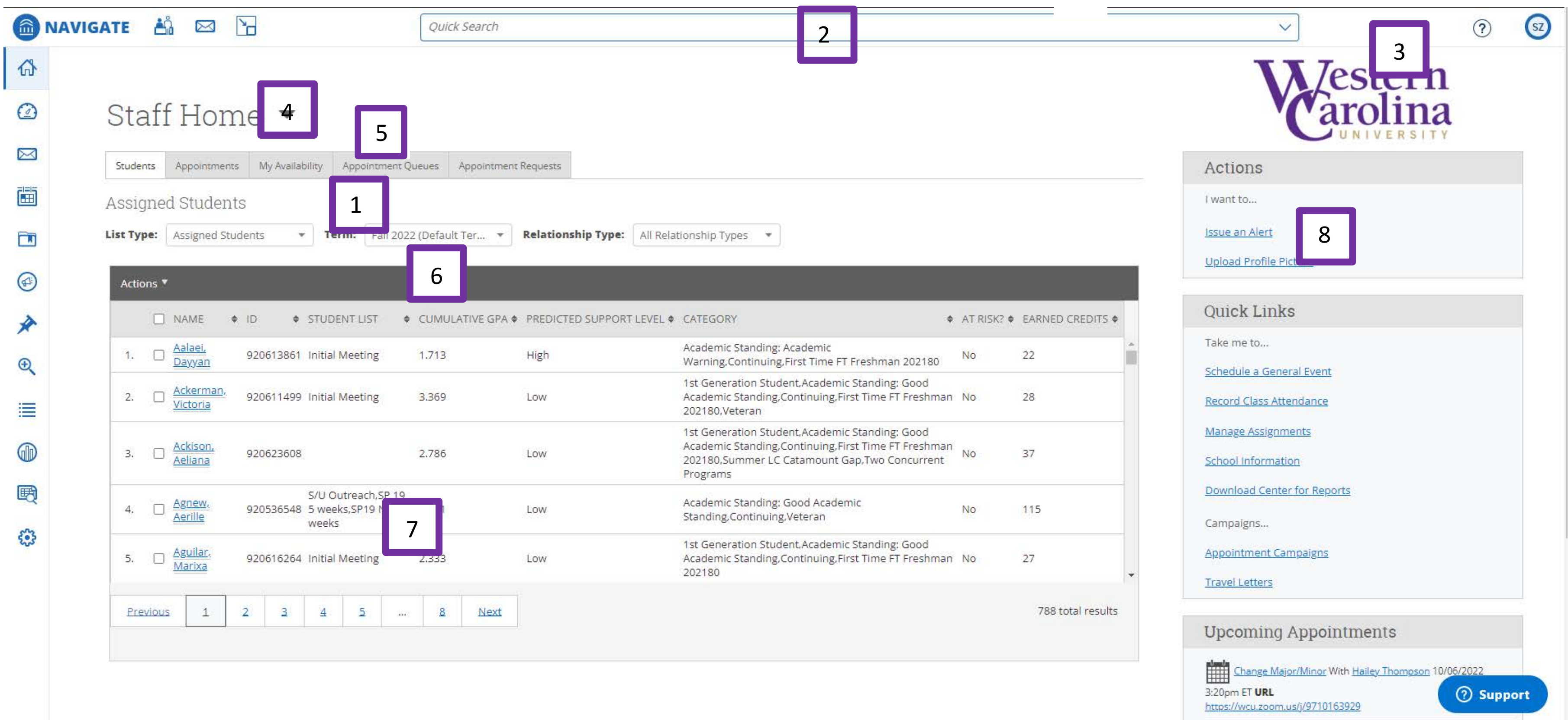
Navigate

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.

<u>Your homepage</u>

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.

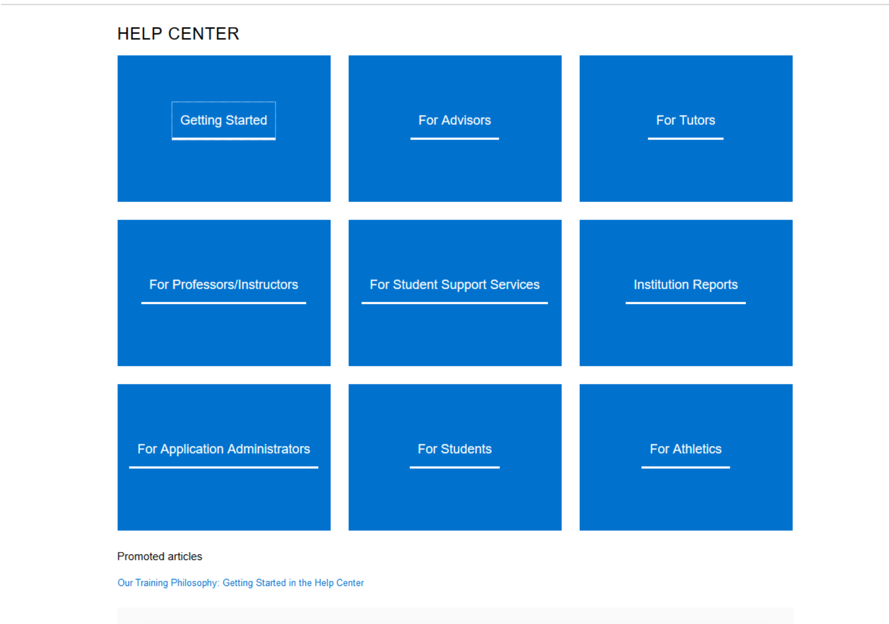
Advisor's Homepage

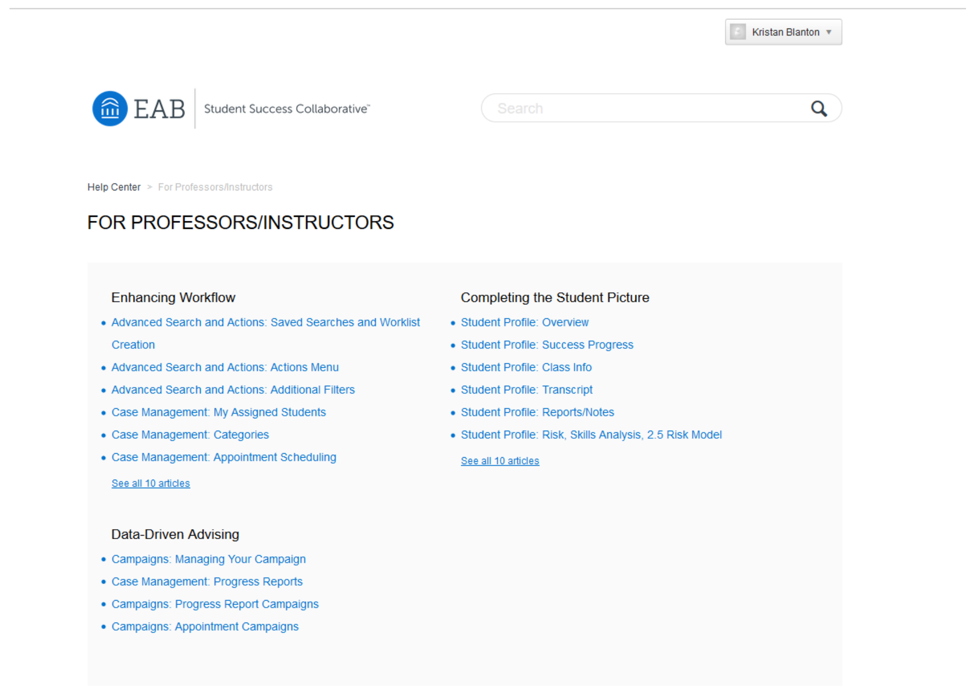


***The numbers on the image above correspond to the numbers on the previous page.**

Help Center

You can to 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.

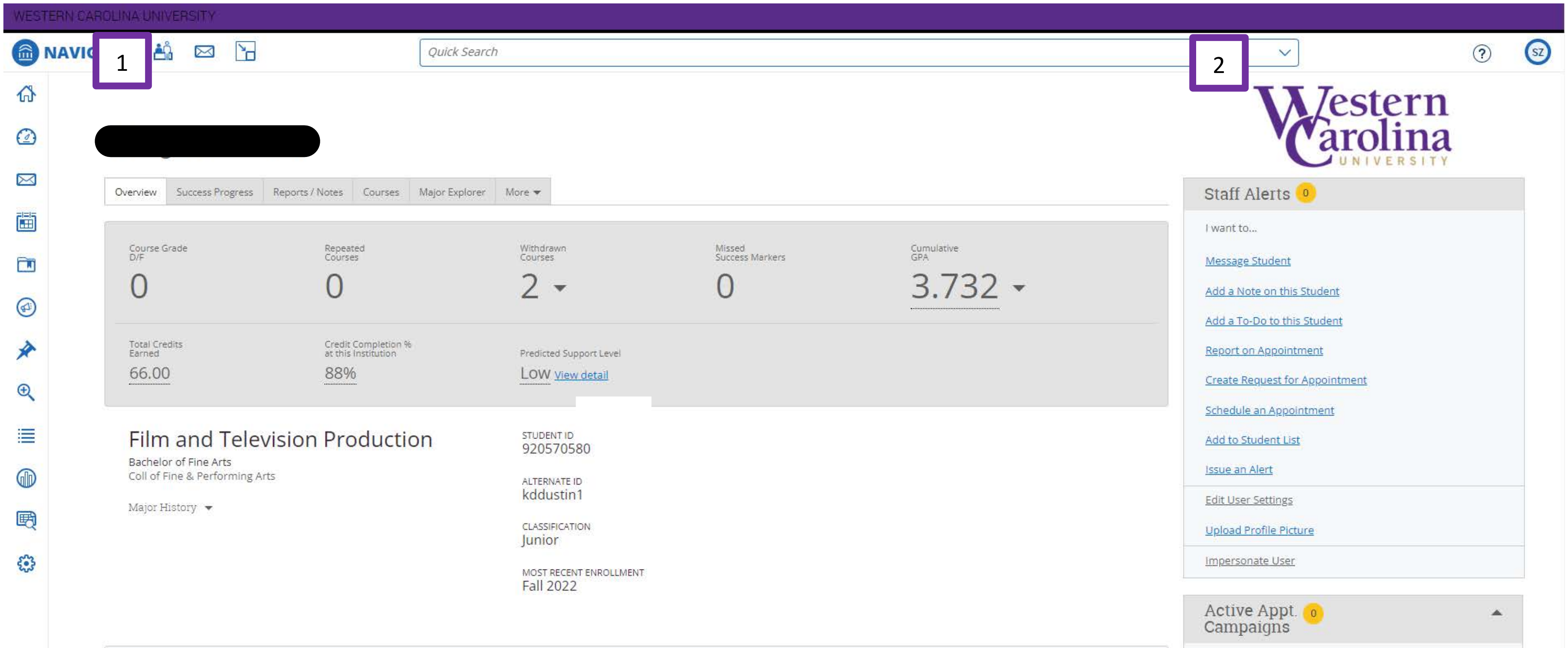




Student's Profile Page

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



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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.

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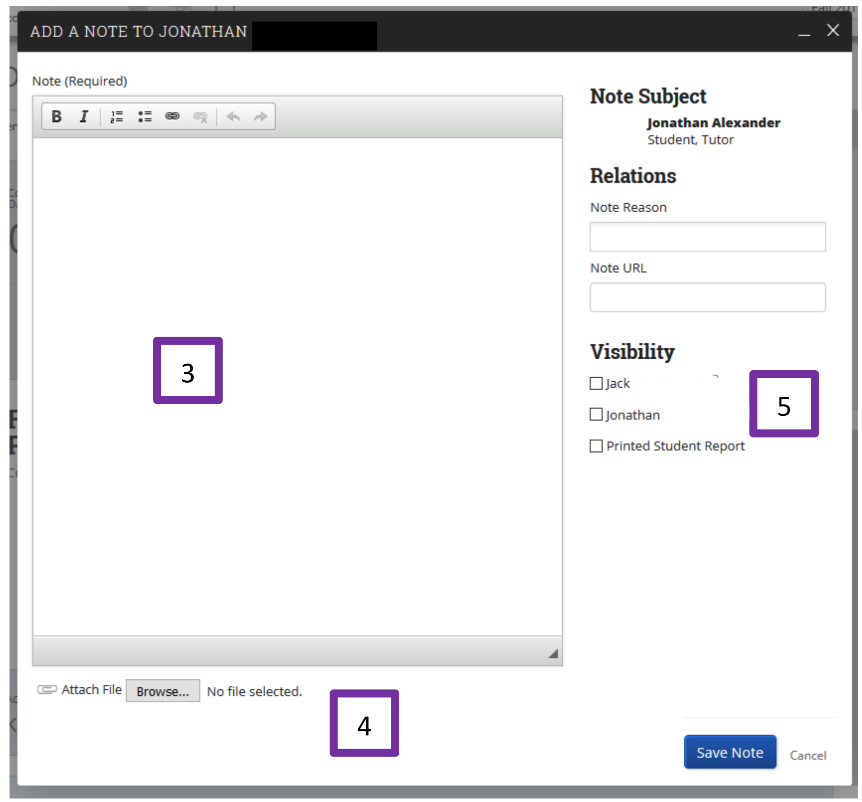

Calendar Integration

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.

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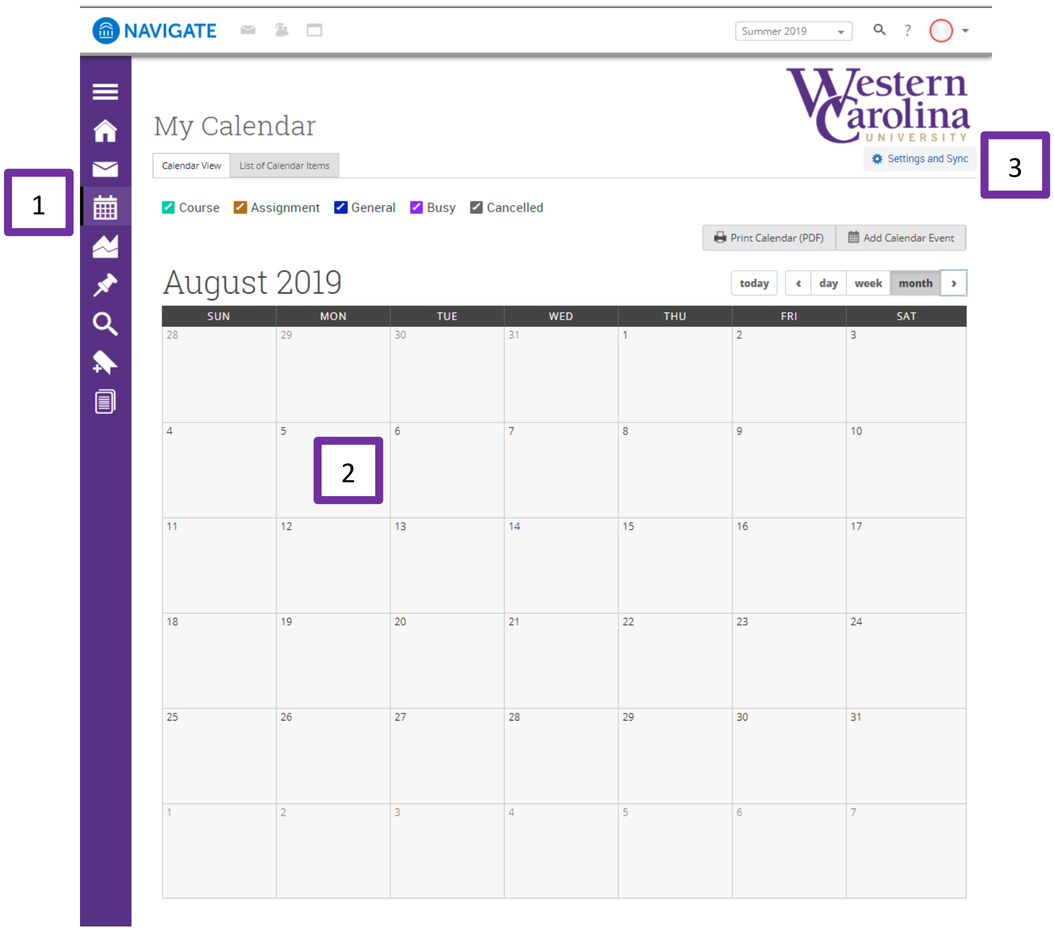
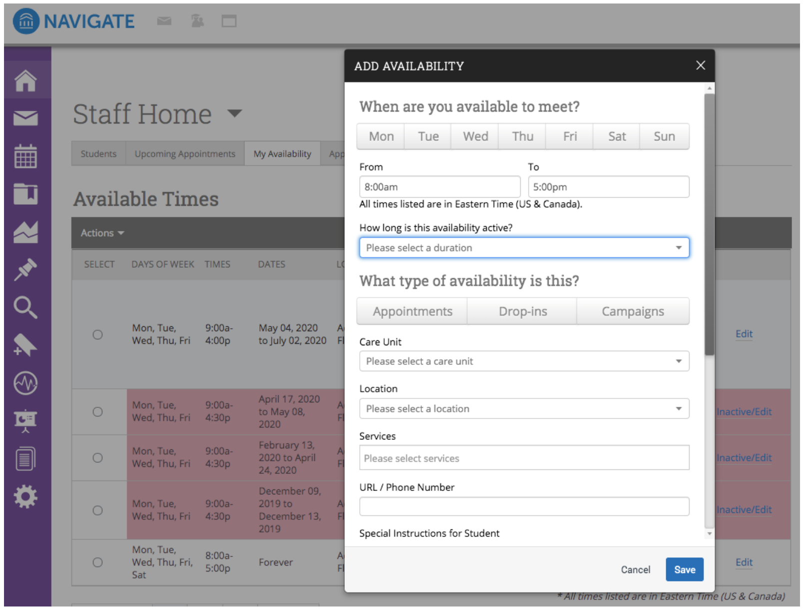


Searching within Navigate

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.

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	
○	Wed	4:00p-5:00p	July 20, 2016 to July 20, 2016	Advising Center- 2nd Floor One Stop	Registration For Appointments	Edit
○	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.

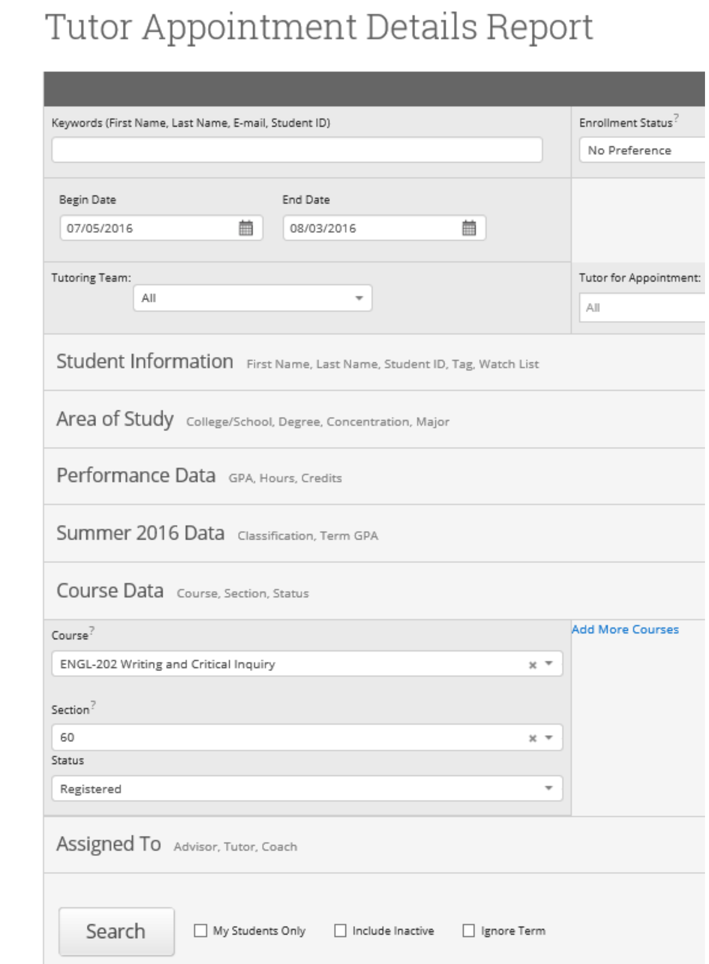
1. Log into myWCU and click on the Advising/Tutoring link in the Quick Links box.
2. Click the blue "Get Advising" button on the right-hand side of the screen.
3. Select the type of advising you are seeking. (Faculty Advising)
4. Select the reason for the appointment from the drop-down menu. (Faculty 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.



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

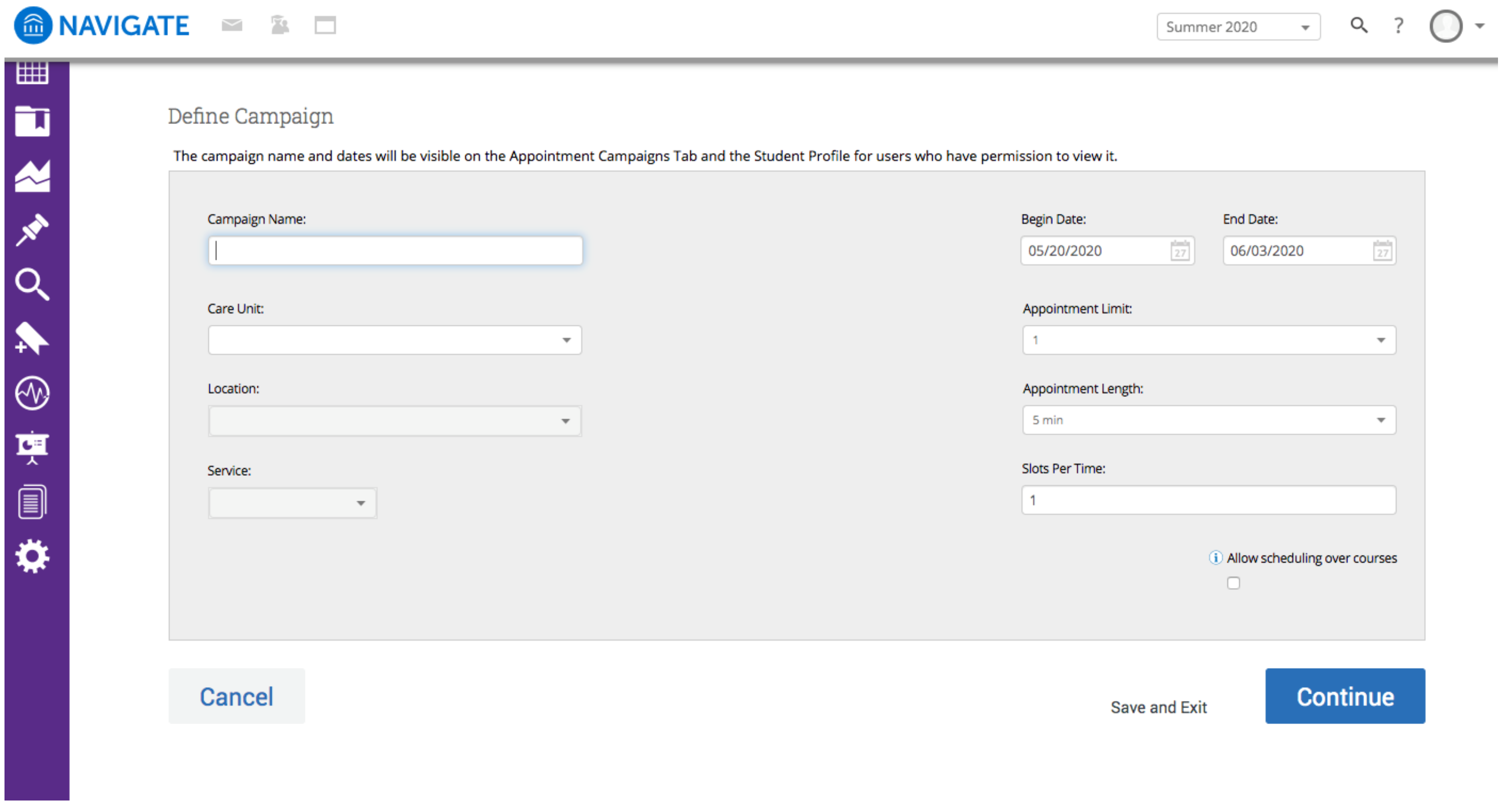
Limitations of Tutor Reports

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.



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.