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Quick Start Guide for Navigate – Advisors

Georgia Highlands College has launched the Navigate platform for advisors and others, with the goal of helping students explore a path to timely graduation completion with data, services, and supportive connections. Use this Quick Start Guide to make the most of your experience.

**GETTING STARTED**

Login to Navigate using your GHC credentials!

**TRAINING Site:** [https://highlands.campus-training3.eab.com](https://highlands.campus-training3.eab.com)

**LIVE Site:** [https://highlands.campus.eab.com](https://highlands.campus.eab.com)

Configure Availability and Calendar for Appointment Scheduling

- **Set Up Your Availability** - This is an important first step that will allow you to then create appointments with students by selecting the ‘Add Time’ from your Advisor home screen - see Appendix A for detailed instructions on setting up your Availability.

- **Sync Your Calendar** - This initiates the two way sync between Navigate and your Outlook. You will receive step by step instructions prior to Navigate’s launch.

**KEY PLATFORM FEATURES**

Perform These Key Actions to Identify, Communication With, and Support Students

- **Reference the Student Profile** – After clicking on a student’s name through the search results, your Advisor Home, or the Quick Search, note their Academic progress and any areas of concern with the various tabs on a student’s profile

- **Add Notes or Advising Summary Reports** – Record your interactions and follow-ups from student meetings by adding an Advising Summary Report (record associated with an appointment) or a Note (general record not associated with a specific meeting)
  - Both are accomplished through the ‘Actions’ menu on your Advisor home or search results, or from a student’s profile.
  - **Reminder!** For scheduled appointments, add summary reports from the “Upcoming Appointments” tab of the advisor home.

- **Mass Email a Group of Students** – Use ‘Send a Message’ from the ‘Actions’ drop-down to contact your Assigned Advisees list or other lists you’ve created in the platform.

- **Issuing Alerts and Managing Cases** – See the “Alerts” section of a student’s profile to see any alerts raised on that student by a faculty or staff member. Examples: Academic Concern (needs tutoring), Attendance, etc. If the alert is your responsibility to resolve, you will see it and the details in the “Cases” tab. There you can keep notes and work with others to ensure the student receives the support that he or she needs.
## Advisor Training Outline

### Platform Function and Location

<table>
<thead>
<tr>
<th>Platform Function and Location</th>
<th>Training Details</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advisor Homepage</td>
<td>Goal: Acclimate Advisors to the key features on their homepages</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Difference between Training &amp; Production Sites</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Note the User Roles Dropdown triangle to toggle between different role homepages</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Global Term Selector – toggles between terms for views into previous or future terms.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Quick Search – easily accessible search bar for access to student profiles. Search by name, ID, or email address.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Review available Icons on the sidebar (may vary depending on user role and permissions)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Conversations Tab</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• SSC Message Inbox (all emails will also be sent to Outlook or Google inbox as well) if email capture is set up.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Calendar Tab</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Explain calendar sync &amp; provide sync instructions for Production site</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Demonstrate hovering over an Advising Appointment to cancel or edit it as needed.</td>
<td></td>
</tr>
<tr>
<td>Student Profile</td>
<td>Goal: Detailed review of available information on student profile to access ahead of advising appointments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Overview Tab:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 30 second Gut Check, Major History, Categories vs. Tags</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Categories- student attributes loaded from your student information system (such as athletes or honors)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Tags- Tags are like categories, but they allow you to manually group similar students together by a common affiliation not otherwise captured in the data (e.g., choir member, interest in graduate school).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ Success Progress Tab:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• GPA &amp; Credit Trends, Success markers overview (if applicable)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Students trigger success marker notifications when they do not earn the recommended grade in courses critical for their major, or when they do not take a course in the recommended timing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>➢ History Tab:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Click on Student’s History to display dropdown with available viewing options (highlight Notes, Alerts, Progress &amp; Advisor Reports)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Holistic view of all student support activities at the institution</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Coordinated Care Network – break down silos between offices, ensure that all advisors</td>
<td></td>
</tr>
</tbody>
</table>
## Advisor Training Outline

<table>
<thead>
<tr>
<th>Platform Function and Location</th>
<th>Training Details</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student Profile, Cont.</strong></td>
<td><strong>Class Info Tab:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 'Classes this Term' reflects registration for the current term.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 'Term Details' shows full academic history/unofficial transcript.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Pre-enrollment information aggregated underneath entry term.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Calendar Tab:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Displays student courses and any appointments made in Navigate.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Student courses will block their availability for scheduling, so they are unable to schedule over class time.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Conversations Tab:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• If permissions allow, Advisors can view students’ conversations with other Advisors if sent via Campus.</td>
<td></td>
</tr>
</tbody>
</table>

### Searching for Students

Goal: Present the Advanced Search as an opportunity to segment out specific populations of students for targeted interventions, outreach, and support. Provide time for training attendees to practice on their own.

**Basic Search:**

- Via the Search tab, advisors can run a basic search similar to that in the quick search (by name, ID, or email address)

**Advanced Search:**

- Click on Show Advanced Filters on the right side of the screen, open up different filter drawers so attendees can see different demographic/academic filters

- Expand some of the filters using the plus sign (if applicable) to display the additional logic options available
- Select a couple of students and click on ‘Actions’ to display the functions available when a search has been completed
- Highlight exporting the search or messaging students from the search.

**Practice Search:** Attendees should spend 5-10 minutes running practice searches

### Saving Searches

Goal: show attendees how to save different types of lists of students for easy access, so they do not have to duplicate efforts in the future.

**Saved Search:** Dynamic searches that can be saved for future reference. Students will be removed from the list if they no longer fit the search criteria

- To save a search, run an Advanced Search and click on the top left hand side of the search that says ‘Save’

**Watch List:** static lists of students that do not change, even if students no longer fit the criteria of the original search.

- To create a watch list, run an Advanced Search and select the students. Click on Actions, and then ‘Watch’ to create a new list.
## Advisor Training Outline

<table>
<thead>
<tr>
<th>Platform Function and Location</th>
<th>Training Details</th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Saving Searches</strong></td>
<td>Advisors can also locate both of these types of student lists from their homepage by clicking on the triangle drop down next to their assigned students</td>
<td></td>
</tr>
</tbody>
</table>

### Creating Availability

**Advisor Homepage, ‘My Availability’ Tab**

Goal: Instruct advisors about correctly setting their availability for advising appointments. Emphasize that students will not be able to schedule without set availability.

- **Appointment Constraints:**
  - Open the gray bar at the top of the tab to adjust individual appointment constraints (hours in advance & default appointment length)

- **Times Available:**
  - Click on Actions, ‘Add Time’ and create an Appointment Availability.
  - Emphasize adding custom ‘details’ in about specific location for the appointment (room number) or additional prep items for students to receive in appointment reminders.

- **Copy Time:**
  - Once an availability has been set up, Advisors can select it and click on ‘Copy Time’ under Actions to make small adjustments to the availability.
  - Have attendees copy an availability and set up Campaign and Drop in availabilities.

- **Inactive Availability:**
  - If an availability occurs in the past or far in the future beyond the present day or term, it will display as pink because it is not currently ‘active’ for students to schedule at those times.

### Appointment Scheduling

**Advisor Homepage, click on an assigned advisee and under ‘Actions,’ click on Schedule Advising Appointment**

Goal: Review available appointment scheduling options in Campus (using available presentation to walk through each option). Teach Advisors how to schedule one-off appointments when needed.

**Advisor Initiated Appointment Scheduling:** Select a student and click on ‘Schedule Advising Appointment’ to get to the grid. Follow workflow below for proper set up:

- **Reasons(s) – student services for the appointment**
- **Comments – anything you need the student to know about the appointment not already designated in Availability details**
- **Location - the location for which you have set up your availability**
- **Appointment length**
- **Select an option available from the grid**
- **‘Available’ toggle allows you to schedule over conflicts if needed**
- **If the appointment should be recurring, select an option for repetition before saving.**
# Advisor Training Outline

<table>
<thead>
<tr>
<th>Platform Function and Location</th>
<th>Training Details</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advising Summary Reports and Notes</strong>&lt;br&gt;Advisor homepage, under ‘recent appointments’ or when selecting an assigned student and clicking on ‘Actions.’</td>
<td>Goal: Instruct attendees about expectations for note-taking and emphasize importance of note completion for the Coordinated Care Network. &lt;br&gt;<strong>Advising Summary Report:</strong>&lt;br&gt;• Filed as the official record after every advising appointment.&lt;br&gt;• Visibility – only available to Advisors &lt;br&gt;<strong>Notes:</strong>&lt;br&gt;• ‘Electronic sticky note’ – can be filed at any time about a student, about appointments or other need-to-know items for other advisors. &lt;br&gt;• Visibility - Can choose whether to share note with student, including links and attachments &lt;br&gt;• Use-case: to add attachments (degree audits, registration pins) or other helpful information that is unrelated to a specific appointment.</td>
<td></td>
</tr>
<tr>
<td><strong>Issuing Alerts and Managing Cases</strong>&lt;br&gt;&lt;br&gt;Issue an Alert&lt;br&gt;&lt;br&gt;Staff Alerts 0&lt;br&gt;&lt;br&gt;Cases&lt;br&gt;&lt;br&gt;Current Unassigned Closed&lt;br&gt;&lt;br&gt;Open Cases</td>
<td>Goal: Demonstrate Alerts and Cases workflow and ensure that users are comfortable viewing alerts, adding comments, assigning cases, and closing cases. &lt;br&gt;<strong>Alerts:</strong>&lt;br&gt;• Flags raised on a student’s profile by a staff or faculty member. Alerts can be configured to send an automated email to the student informing them of the alert and directing the student to the appropriate resources &lt;br&gt;• Alerts appear in two places on a student’s profile: Under Staff Alerts on their main profile page and within in the History/Notes tab. &lt;br&gt;<strong>Cases:</strong>&lt;br&gt;• Alerts can, but do not always, create a Case. A Case is the workflow within the platform that connects a student’s issue with the appropriate person or office to assist the student. Example: if an alert is issued because a student needs tutoring, that may go to a person who leads a tutoring program. Meanwhile, an attendance concern alert may go to the student’s advisor. &lt;br&gt;• Users who have Cases assigned to them can see the comments from the person who issued the Alert as well as any notes on the Case they themselves (or others) have added. The person who issued the alert will receive an automated email when a case has been resolved (and the student assisted).</td>
<td></td>
</tr>
</tbody>
</table>
Setting Up Your Availability

Availability

As a new user, the first thing you need to do is set up availability in Navigate so that students can schedule appointments to see you. It is important to note that locations and services are created by university administrators.

Add Time -

**Step 1:** Click the Add Time button in the Actions Menu – make sure to be under you’re the My Availability tab at the top.

**Step 2:** Select the days and times when you are available to meet with students. If you are wanting to offer a single day at one time frame (for AA1 or AA2), select the drop down menu under How long is this availability active? and select A Range of Dates.

**Step 3:** For your type of availability, please select Appointments & Campaigns.

**Step 4:** Choose the care unit of Academic Advising.

**Step 5:** Choose the location.

**Step 6:** Select the service you are scheduling for, such as AA1, AA2, AA3, or EBA etc.

**Step 7:** Provide special instructions to the students making an appointment. For example, if you are scheduling an online session, explain how the session will be accessed.
Setting Up Your Availability (continued)

Will you be meeting with multiple students?
These settings will not be used for Kick and campaign purposes.

Max Number of Students per Appointment
1

Step 8: Set your max number(s) of students per appointment.

Step 9: Click the Save button.
Repeat this process until all of your availabilities have been defined.

Note: You can have as much availability as needed.

There are two other options when adding Times Available:

**Copy Time** - to copy a time, select the time you would like to copy (see yellow arrow below), and then under the Actions tab, click the Copy Time button (see red arrow below). The availabilities will be copied and a dialog will open allowing you to make edits or to save your newly created availability.

**Delete Time** - to delete your time, simply select the time (see above at yellow arrow), and then under the Actions tab, click the Delete Time button (see blue arrow below).

Note: Inactive availabilities are highlighted in red in the Times Available grid.
Cancelling Appointment

If you need to cancel an appointment due to low or no enrollment, there is an option for you.

Step 1: From the Upcoming Appointments tab, click on Details next to each appointment (see yellow circle above).

Step 2: Select Cancel Appointment at the bottom left of the window that appears (see red circle below).

CONTINUED ON NEXT PAGE
Cancelling Appointment (continued)

Step Three: After clicking on Cancel Appointment, the window will change to prompts you must fill out to cancel the appointment.

- For the Cancel Appointment For option, select the student who you are cancelling the appointment for. If you are cancelling the entire appointment, select Entire Appointment (see red arrow above).
- For the Reason option, select either Need to Reschedule or No Longer Needed (see yellow arrow above).
- Make sure to fill out the comments box and customize the wording you would like to send the students, such as suggesting to reschedule and choose a new available time.

Note: Deleting the availability will not cancel existing appointments. It will only remove it from the list of options students see when scheduling new appointments.
Report on Appointment

Advisor Training

After seeing a student (or a group), it is important to report on the appointment in their Navigate profile.

Access the My Availability tab at the top. Scroll down to the Reporting section.

---

Step 1: Select the box next to the appointment you would like to report on. It will then turn blue and be checked.

Step 2: Under the Actions tab, click on Add Appointment Summary (circled in yellow to the left).

Step 3: The window (see below) will pop-up to begin the reporting.

Step 4: The appointment date, time, care unit, location, etc. should already be selected for you based on how you originally schedule the appointment.

Step 5: Fill out all relative information about the appointment. Add additional notes, if applicable.

Step 6: Once complete, click on the Save this Report button at the bottom.

---

After seeing a student (or a group), it is important to report on the appointment in their Navigate profile.
## Major Explorer

Before AA2, a student completes the Major Explorer tool in Navigate. Advisors will review the results to assist in a student’s academic plan.

**How to Access** – you can view a student’s results from the Major Explorer tool in their profile when you select the *Overview* tab at the top. Examples of results are below.

<table>
<thead>
<tr>
<th>Goals &amp; Interests (supplied by the student)</th>
<th>Career Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Degree Goal ?</td>
<td></td>
</tr>
<tr>
<td>Start my career</td>
<td>1. High Job Demand</td>
</tr>
<tr>
<td></td>
<td>1. High Salary</td>
</tr>
<tr>
<td>Favorite Majors</td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
</tr>
<tr>
<td>Favorite Fields</td>
<td></td>
</tr>
<tr>
<td>Administrative and Support Services</td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Goals &amp; Interests (supplied by the student)</th>
<th>Career Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Degree Goal ?</td>
<td></td>
</tr>
<tr>
<td>Transfer to a 4-year or other school</td>
<td>1. High Job Demand</td>
</tr>
<tr>
<td></td>
<td>1. Match My Interests</td>
</tr>
<tr>
<td>Favorite Majors</td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
</tr>
<tr>
<td>Favorite Fields</td>
<td></td>
</tr>
<tr>
<td>Computers</td>
<td></td>
</tr>
<tr>
<td>English</td>
<td></td>
</tr>
<tr>
<td>Sports &amp; Physical Education (P.E.)</td>
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<td></td>
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**Academic Self-Assessment**

Before AA2, a student completes the academic self-assessment tool in Navigate. Advisors will review the results to assist in a student’s academic plan.

**How to Access** – you can view a student’s results from the academic self-assessment under the *History* tab in the student’s profile. Scroll down to the Note History for the student. Click on the down arrow (circled in yellow below) to reveal more detailed information.

---

**History**

![History Screen](image-url)

---

**History**

![History Screen](image-url)
Sending a Message

You can contact the students via email and/or text in Navigate!

**How to Access** – you can either message a student individually by clicking on just their box to the left of their name (see yellow circle below), or you can email all of your assigned students by selected the all box (see red circle below).

Staff Home

My Assigned Students for Spring Semester 2019

<table>
<thead>
<tr>
<th>Actions</th>
<th>Student Name</th>
<th>ID</th>
<th>Watch List</th>
</tr>
</thead>
<tbody>
<tr>
<td>🗣️ ALL 🗣️</td>
<td>Agan, Kayley</td>
<td>900160796</td>
<td></td>
</tr>
</tbody>
</table>

And then select the Actions tab, and select *Send Message*.
Viewing Appointment History

Before an appointment with a student, it is best practice to view notes and appointment reports from previous advisors. Taking the time to read through these may help guide their appointment with you.

Step One: Once you access a student's profile, there will be a toolbar on the top underneath their name. To access previous appointment notes, click on the History tab.

Step Two: Scroll down to the bottom window title the student's name and History (see screenshot example below). With this example, you can see several notes from both advising and the tutorial center.

Step Three: To the contents of a note or appointment report, click on the arrow next to the appointment title (see yellow arrow above).

Step Four: Click on View Report to view the entire report contents. Sometimes you will not see a View Report option and that could be due to an appointment being cancelled or the student was a no-show.
Reports vs. Notes

Under the History tab on a student’s profile, you can see all different types of notes and reports, such as advising reports, advising notes, tutoring notes, etc. And it may be helpful to understand the differences!

REPORTS

- Are used in any advising meeting:
  - The meeting might be in-person or via Zoom
  - There is a time element involved
  - We might be meeting with them about their schedule, help them through some personal decisions, or discussing study abroad opportunities – all examples of an advising report
- Always use reports when meeting with a student

NOTES

- Are used to record information about the student for later reference
- Examples:
  - Recording an email correspondence
  - A follow up visit from a student asking more questions
- Notes also have the option to choose that only the advisor who wrote the note can view the note – for example, if a student discloses a personal issue that you want to refer back to again, just in case, then you can make a note on their profile and choose the specific viewing options
- Students can be also given the option to view notes on their profile – the advisor must select that viewing option
- Notes also have reasons you can choose, which is the topic of the note

NOTE: The same professionalism and discernment required of Advising Reports applies to your use of the Notes functionality, including compliance with FERPA guidelines.
Manually Scheduling an Appointment for a Student

A student may have issues scheduling an appointment, and you have the option to manually schedule an appointment for the student.

**Step One:** from the Advisor homepage, make sure the *Students* tab is selected at the top, and then click on the box next to the student you want to schedule an appointment for (see yellow circle below).

**Step Two:** And then select the Actions tab, and select *Schedule Appointment* (see yellow arrow to the left).

**Step Three:** Change the Care Unit to Academic Advising (see red arrow below).

**Step Four:** Below the Care Unit, then select your location for appointment.

**Step Five:** Below the Location, select the service for the appointment, such as AA1, AA2, or AA3.

**Step Six:** Select the dates on the calendar.
Manually Scheduling an Appointment for a Student (continued)

Select An Organizer

<table>
<thead>
<tr>
<th>SELECT</th>
<th>ORGANIZER</th>
<th>AVAILABLE TIMES</th>
</tr>
</thead>
</table>
| 🛋️    | Petro, Jillian | For: Appointments/Campaigns Wed 3:30pm-4:30pm (January 30 – January 30, 2019)  
For: Appointments/Campaigns Tue 9:30am-10:30am (February 5 – February 5, 2019)  
For: Appointments/Campaigns Mon 12:30pm-1:30pm (February 4 – February 4, 2019) |

Step Seven: Select the organizer (see yellow arrow above).

Choose A Time To Meet

<table>
<thead>
<tr>
<th>TIME SLOT</th>
<th>01/27 (SUN)</th>
<th>01/28 (MON)</th>
<th>01/29 (TUE)</th>
<th>01/30 (WED)</th>
<th>01/31 (THU)</th>
<th>02/01 (FRI)</th>
<th>02/02 (SAT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00pm - 1:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1:00pm - 2:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2:00pm - 3:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
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<td></td>
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</tr>
<tr>
<td>3:00pm - 4:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>2/15</td>
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<td></td>
</tr>
<tr>
<td>4:00pm - 5:00pm</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2/15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5:00pm - 6:00pm</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6:00pm - 7:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7:00pm - 8:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8:00pm - 9:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9:00pm - 10:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:00pm - 11:00pm</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td>CONFLICTS</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Step Eight: Search through the available dates until you are able to find one that does not conflict with the student’s class schedule.

Step Nine: Once you find an appointment (the green box above), click on the checkbox inside.

Step Ten: Double check the Reminders on the left hand side and select the reminders you would like to send.

Step Eleven: Click on the blue Save Appointment button.

Reminders

- Send E-mail Reminder to the organizer attendee?
- Send E-mail Reminder to non-organizer attendees?
- Send a text reminder to the organizer attendee?
- Send a text reminder to non-organizer attendees?

Save Appointment
How to Create a Campaign to Track Appointments

You may find it helpful to create campaigns to reach out to your assigned students and then track their response to the campaign and making appointments.

What type of availability is this?

Appointments  Drop-ins  Campaigns

Care Unit

Academic Advising

Step One: Set your availability like normal, but be sure to choose Appointment and Campaigns under What type of availability is this?

Step Two: Select the Campaign tab on the left side of your home screen.

Step Three: Select the Appointment Campaigns tab at the top (see yellow circle below).

Step Four: On the ride side under Actions, select Appointment Campaign (see red circle below).

Spring Semester 2019 Campaigns

Progress Report Campaigns  Enrollment Censuses  Appointment Campaigns

Actions

I want to create a new...

Progress Report Campaign

Enrollment Census Campaign

Appointment Campaign

CONTINUED ON NEXT PAGE
How to Create a Campaign to Track Appointments (continued)

**Step Five:** Complete all the required selections in the screen that appears. Make sure your *Campaign Name* has your name and the Advising Activity.

- If you have availability set for multiple campuses, you will need to create a campaign for each campus. Add the campus to your *Campaign Name*, if that is the case.
- *Appointment Limit* should be set to 1.
- *Appointment Length* should be set to 60 for both AA1 and AA2.
- *Slots Per Time* should be the same as what you put in your availability.
- When finished, select *Continue*.

![Campagne Form](image)

**Step Six:** On the next screen, you will search for the students you would like to invite to this specific campaign. Run the Advanced Search (see yellow circle below), and then select the *Student Information* bar (see blue arrow below), and then limit your invitees to those with a Tag for a current semester's Quest cohort and assigned to you (see red circle below). Select *Search* when ready.

![Student Information Table](image)

*CONTINUED ON NEXT PAGE*
How to Create a Campaign to Track Appointments (continued)

Step Seven: On the next screen, you can review the students you added. Make sure to check the box beside Name to check them all. Select Continue.

Step Eight: Check the box beside your name on this screen and then select Continue. If your name does not appear, it means you do not have any availabilities set during the date range you chose to run the campaign. Go back and check your availabilities and/or the date range you chose for the campaign.

Step Nine: On the next screen, you can customize the message that will be sent to students. Anything in {} should not be changed. Select Continue when the message appears as you like it.

Compose Your Message

```
{$_.student_first_name}, Schedule an Academic Advising appointment
```

Please schedule your Academic Advising appointment.

Hello {$_student_first_name}:

Please schedule an appointment for Quest Advising Activity 1 at Cartersville Site. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{$_schedule_link}

Thank you!

CONTINUED ON NEXT PAGE
How to Create a Campaign to Track Appointments (continued)

**Step Ten:** On the final screen, you can review the details and choose how students are notified. If you are happy with the selections, select *Send* and the message will be sent.

**Confirm & Send**

<table>
<thead>
<tr>
<th>Care Unit: Academic Advising</th>
<th>Start Date: 01/01/2019</th>
<th>End Date: 02/11/2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location: Cartersville Site</td>
<td>Appt Length: 60 minutes</td>
<td>Slots Per Time: 1</td>
</tr>
<tr>
<td>Service: Quest Advising Activity 1</td>
<td>Appt Limit: 1</td>
<td>Organizer Attendee Reminders: [ ]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E-mail SMS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Non Organizer Attendee Reminders: [ ]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E-mail SMS</td>
</tr>
<tr>
<td><strong>Subject</strong> ($student_first_name), Schedule an Academic Advising appointment</td>
<td></td>
<td>Included organizers View All (1)</td>
</tr>
<tr>
<td>Email Preview View</td>
<td>Invites: View All (1)</td>
<td></td>
</tr>
</tbody>
</table>

< Back  Save and Exit  Send

**Step Eleven:** To monitor the campaign, go back to the Campaign tab on the left side from the homepage and select Appointment Campaign (see step two). Your campaign should be listed.

- When you click on the campaign, you will see four tab options:
  - Appointments Made
  - Appointments Not Yet Made
    - Under this tab, you can message the students by clicking on the boxes beside their names, choosing *Actions*, and then *Send Message*.
  - Reports Created
  - Eligible Appointments

Appointment Campaigns  Jennifer Hicks - Quest Advising Activity 1

CONTINUED ON NEXT PAGE
How to Create a Campaign to Track Appointments (continued)

Eligible Appointments Tab

When you have a student who is apart of your campaign and schedules an appointment with you on their own (not through the link in the initial email from the campaign), then their upcoming/past appointments may appear under the Eligible Appointments tab.

<table>
<thead>
<tr>
<th>Appointments Made</th>
<th>Appointments Not Yet Made</th>
<th>Reports Created</th>
<th>Eligible Appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>🗓️ INDEX DATE STUDENT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ 1 09/25/2019 03:00 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ 2 11/13/2019 04:00 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ 3 11/20/2019 09:00 AM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ 4 11/13/2019 11:00 AM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Step One: When you have accessed your campaign (see previous instructions), click on the Eligible Appointments tab (see blue arrow above). You then may see a list of students who have upcoming/past appointments that you will want to add to your Appointments Made tab in order to make it easier to keep track.

Step Two: Click on the checkbox for the student (or choose the ALL checkbox at the top, if you would like to move all the students), and then click on the Actions tab, and then click on Associate Appointments (see red arrow below).

Step Three: It may then prompt you if you wish to add the student(s) and if you wish to continue. If so, click OK. The student(s) will then be placed under the Appointments Made tab, which can be access at the top where you initially selected Eligible Appointments.
How to Pull a Report of Students (who have not signed up for an appointment)

This is how you can pull a specific report to show what students are still needing to schedule an appointment with you for any Advising Activity (you can choose).

**Step One:** Click on the Reporting icon on the left toolbar (circled in yellow to the left).

**Step Two:** Click on Students with/without an Appointment.

**Step Three:** Circled in red below, select the date. Choose 01/14/2019 as start date.

**Step Four:** Circled in blue below, filter by service: Quest Advising Activity (1, 2, or 3, depending on what you are searching for)

CONTINUED ON NEXT PAGE
How to Pull a Report of Students (who have not signed up for an appointment)

Step Five: Under the Student Information tab, select Quest Advising (QEP).

Step Six: Under the Assigned to tab, search and select the advisor (circled in blue below).

Step Seven: Make sure to select the Without Appointment checkbox below (circled in red below).

Step Eight: Click Search.
Sync Your Calendar

Set Up in Navigate

**STEP ONE:** In Navigate, click on the Calendar icon, click on Settings and Sync on the far right.

**STEP TWO:** Select Setup Sync

**STEP THREE:** Select Microsoft Outlook -> Microsoft Office 365

The initial sync may take up to 30 minutes. Once your calendar is synced you will see the date/time of the last sync.
Academic Plan

Creating an academic plan with students will help them organize their semesters and know when they will be able to complete their degree with GHC. This academic plan gives students a personalized map to graduation. Once students accept the plan on their side of Navigate, they can go back and view this plan when they register each semester. Other GHC faculty and staff can also view the plan.

Step One: To create an academic plan for a student, search for their profile in Navigate. Once there, underneath their name at the top, click on the Academic Plan tab.

Step Two: Give it a few seconds for the planner to load. Double check the student’s pathway is correct at the top left. If pathway is incorrect, check Online Advising and/or SCORECard. If pathway is incorrect there as well, please have student complete a change of pathway form on the Registrar’s website.

Step Three: To begin making a plan, click on the green Add Comments or Suggestions button in the top right-hand corner.

Step Four: To begin planning for future semesters, click on the + Add Term button (shown on the right with a blue arrow) on the top right-hand corner and select the semester you want to add to the plan.

Note: Some students may already have a previous semester plan(s) from orientation or previous advising sessions, so you may need to reorganize the semesters.

CONTINUED ON NEXT PAGE
Academic Plan

Step Five: Scroll down to the semester you are planning for, and this is where you can begin dragging classes from the academic plan on left to semester column on the right.

If you would prefer not to drag the courses, you can also click on the lines icon to the left of a course (shown on the right with a red arrow), and then click on Move to Term, and then select the semester you would like the course to move to (shown on the right with the green arrow).

Other Menu Options

Remove from Term: To remove a course from a term, select Remove from Term. You can also remove by dragging or moving course to another term.

Lock Course: To lock a course to prevent a student from moving the course to other semesters, select Lock Course. And then follow the prompts.

Add Flag: If you would like to make notes to a course, adding a flag allows you to add comments that the student will be able to see.

CONTINUED ON NEXT PAGE
Academic Plan  

**Step Six:** Once the semesters are planned out, scroll to the top and click on the *Send Suggestions to* button in the top right-hand corner.

Another prompt will pop-up, and then you will click *Send* again.

**Step Seven:** For the academic plan to save to a student’s file, the student must then log into their side of Navigate and accept it. Please try and have the student complete this process with you, just in case.

**For the Student to Accept:**

**Step Eight:** The student can log into their student portal, click on the Navigate icon to log into their side.

**Step Nine:** The student can follow the prompts until they reach the homepage, and then click on the *Planner* tab at the top (shown on the right with the yellow arrow).

**Step Ten:** Once the plan loads, there is a green button at the top right-hand corner labeled *Accept All.*
Academic Plan – Adding a Flag

When creating an academic plan, there may be some courses you would like to flag and provide comments as to why you recommended a course to satisfy a specific requirement for a student’s pathway. Adding a flag to a course allows you to do just that!

**Step One:** Once you access a student’s academic plan (please see the academic plan tutorial in this manual, if needed), and you have added a course to the planned semester, click on the lines menu icon to the left of the specific course you want to flag.

**Step Two:** From the menu options for that specific course, select *Add Flag*.

**Step Three:** A window should appear where you can type in comments, and then when complete, click the *Flag* button at the bottom of the window.

Make sure to keep the flag comments to a 280 maximum limit.
Creating a Watchlist

It is helpful to create watchlists to keep track of your assigned students. Some advisors also have students on multiple campuses, so having a watchlist for each campus is a great way to stay organized.

Step One: From the Advisor homepage, click on the Advanced Search icon located on the black toolbar on the left. This is how you will search for the students in your watchlist.

Step Two: There are multiple options to choose from when completing an advanced search. The most commonly used parameters will be found under the Student Information, which is the first tab (shown in yellow circle on the left). Click on this to expand the options.

Step Three: If you would like to create a watchlist based on campus locations, under the Category option, click on the box to reveal the campus location options (shown with red arrow on the left).

Step Four: If you would like to create a watchlist based on a particular cohort or semester, under the Tag option, click on the box to reveal the tag options, such as Quest Fall 2019 (shown with green arrow on the left).

Step Five: Once you have your preferred search parameters selected for your watchlist, scroll to the bottom and make sure to select the checklist for My Students Only (shown with blue arrow above). And then click the blue Search button.

CONTINUED ON NEXT PAGE
Creating a Watchlist

**Step Six**: Your list of students based on your chosen parameters will populate. If you would like to create a watchlist with that exact search result, click on the checkbox next to the **ALL** option (shown with the orange arrow on the left).

**Step Seven**: Make sure to double check to see if you are dealing with multiple pages of students with your list. You can tell by boxes below showing multiple page options (shown with the red circle on the left). If so, then when you click on the checkbox for the **ALL** option (STEP SIX), then you will need to move forward to the next step (STEP EIGHT). If you do not have multiple pages, then skip to STEP NINE.

**Step Eight**: Towards the middle of the searched list, there is an option where you can choose to select all items (shown with the blue circle on the left). Click on the **Select all ### items**, that should be highlighted in blue for you.

**Step Nine**: Once all your students are selected, click on the **Actions** option at the top left of the list, and then click on **Watch** (shown with the pink arrow on the left).

**Step Ten**: Choose for your searched list to be added to an already created watchlist, or click on **Create new list**. After either selecting or creating a new list, make sure to click on the blue **Save** button.

You can now access your watchlist from your Advisor homepage.
How to Resolve Blocked Plans

When accessing a student’s academic plan, you may run into the error of the plan being blocked. As you can see in the screenshot below, there are multiple reasons that this can happen: a student registered or waitlisted courses, a student dropped courses from the plan, a student changed their major, and/or a course was marked as met/unmet.

There are multiple options to choose from when you come across this error. Make sure to read through each option and decide which one best suits what you and the student are trying to do with their academic plan. All the option buttons are located in the bottom right-hand side of the window.

VIEW SUGGESTED PLAN

- This option is when you want to view the original academic plan that an advisor created/sent.

DISCARD ALL SUGGESTIONS

- This option discards conflicting suggestions. For example, in the screenshot above, the middle box indicating Conflicting Suggestions is what would be removed if this option is selected.
- This discards every suggestion the advisor made, even if it is not conflicting.

APPLY AND EDIT CHANGES

- This option removes course(s) that are no longer relevant for their plan.
- Anything listed in the Non-Conflicting Suggestions (the bottom box) will stay.