



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>

LIVE Site: <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

Advisor Training Outline

Platform Function and Location	Training Details	Additional Notes
Advisor Homepage 	<p>Goal: Acclimate Advisors to the key features on their homepages</p> <ul style="list-style-type: none"> • Difference between Training & Production Sites • Note the User Roles Dropdown triangle to toggle between different role homepages • Global Term Selector – toggles between terms for views into previous or future terms. • Quick Search – easily accessible search bar for access to student profiles. Search by name, ID, or email address. • Review available Icons on the sidebar (may vary depending on user role and permissions) <p>➤ Conversations Tab</p> <ul style="list-style-type: none"> • SSC Message Inbox (all emails will also be sent to Outlook or Google inbox as well) <i>if email capture is set up</i>). <p>➤ Calendar Tab</p> <ul style="list-style-type: none"> • Explain calendar sync & provide sync instructions for Production site • Demonstrate hovering over an Advising Appointment to cancel or edit it as needed. 	
Student Profile	<p>Goal: Detailed review of available information on student profile to access ahead of advising appointments</p> <p>➤ Overview Tab:</p> <ul style="list-style-type: none"> • 30 second Gut Check, Major History, Categories vs. Tags • Categories- student attributes loaded from your student information system (such as athletes or honors) • 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). <p>➤ Success Progress Tab:</p> <ul style="list-style-type: none"> • GPA & Credit Trends, Success markers overview (if applicable) • 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 <p>➤ History Tab:</p> <ul style="list-style-type: none"> • Click on Student's History to display dropdown with available viewing options (highlight Notes, Alerts, Progress & Advisor Reports) • Holistic view of all student support activities at the institution • Coordinated Care Network – break down silos between offices, ensure that all advisors 	

Advisor Training Outline

Advisor Training Outline, Cont.

Platform Function and Location	Training Details	Additional Notes
Student Profile, Cont.	<ul style="list-style-type: none"> ➤ Class Info Tab: <ul style="list-style-type: none"> • 'Classes this Term' reflects registration for the current term. 'Term Details' shows full academic history/unofficial transcript. Pre-enrollment information aggregated underneath entry term. ➤ Calendar tab: <ul style="list-style-type: none"> • Displays student courses and any appointments made in Navigate. • Student courses will block their availability for scheduling, so they are unable to schedule over class time. ➤ Conversations Tab: <ul style="list-style-type: none"> • If permissions allow, Advisors can view students' conversations with other Advisors if sent via Campus. 	
Searching for Students 	<p>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.</p> <ul style="list-style-type: none"> ➤ Basic Search: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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  <ul style="list-style-type: none"> • 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. <p>Practice Search: Attendees should spend 5-10 minutes running practice searches</p>	
Saving Searches 	<p>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.</p> <ul style="list-style-type: none"> ➤ 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 <ul style="list-style-type: none"> • 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. <ul style="list-style-type: none"> • To create a watch list, run an Advanced Search and select the students. Click on Actions, and then 'Watch' to create a new list. 	

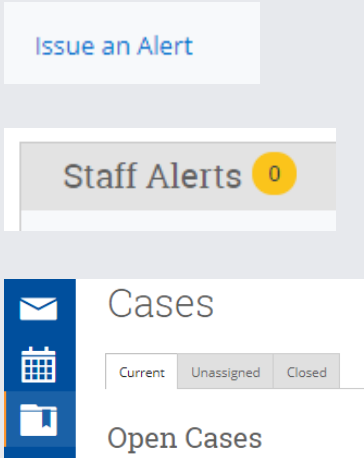
Advisor Training Outline

Advisor Training Outline, Cont.

Platform Function and Location	Training Details	Additional Notes
Saving Searches 	<ul style="list-style-type: none"> 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 	
Creating Availability Advisor Homepage, 'My Availability' Tab 	<p>Goal: Instruct advisors about correctly setting their availability for advising appointments. Emphasize that students will not be able to schedule without set availability</p> <ul style="list-style-type: none"> ➤ Appointment Constraints: <ul style="list-style-type: none"> Open the gray bar at the top of the tab to adjust individual appointment constraints (hours in advance & default appointment length) ➤ Times Available: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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 that those times. 	
Appointment Scheduling Advisor Homepage, click on an assigned advisee and under 'Actions,' click on Schedule Advising Appointment	<p>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.</p> <p>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:</p> <ul style="list-style-type: none"> 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 'Availabilities' 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

Advisor Training Outline, Cont.

Platform Function and Location	Training Details	Additional Notes
Advising Summary Reports and Notes Advisor homepage, under 'recent appointments' or when selecting an assigned student and clicking on 'Actions.'	<p>Goal: Instruct attendees about expectations for note-taking and emphasize importance of note completion for the Coordinated Care Network.</p> <p>Advising Summary Report:</p> <ul style="list-style-type: none"> Filed as the official record after every advising appointment. Visibility –only available to Advisors <p>Notes:</p> <ul style="list-style-type: none"> 'Electronic sticky note' – can be filed at any time about a student, about appointments or other need-to-know items for other advisors. Visibility - Can choose whether to share note with student, including links and attachments Use-case: to add attachments (degree audits, registration pins) or other helpful information that is unrelated to a specific appointment. 	
Issuing Alerts and Managing Cases 	<p>Goal: Demonstrate Alerts and Cases workflow and ensure that users are comfortable viewing alerts, adding comments, assigning cases, and closing cases.</p> <p>Alerts:</p> <ul style="list-style-type: none"> 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 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. <p>Cases:</p> <ul style="list-style-type: none"> 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. 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). 	

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.

Advisor Home ▾


Students

Upcoming Appointments

My Availability

Advising Center

Advising Requests

 Edit Appointment Constraints

Times Available

Actions ▾					
<div><div>Add Time</div><div>Copy Time</div><div>Delete Time</div></div>					
	OF	TIMES	DATES	LOCATION	SUBJECT
<input type="radio"/>	Tue, Wed, Thu, Fri	8:00a-5:00p	Forever	Academic Success Center	Advising, Changes to my Schedule, Internship/Job Search Assistance, Interview Coaching, Orientation, Resume Development, Selecting a Major, Weekly Meeting / Scheduled Meeting For Appointments
<input type="radio"/>	Mon	9:00a-5:00p	Forever	Academic Success Center	No listed Student Services

ADD AVAILABILITY



I'm available on

Mon

Tue

Wed

Thu

Fri

Sat

Sun

8:00a - 5:00p

for

Drop-ins

Appointments

Campaigns

Duration

Location

Select Location to select Student Services

Cancel

Save

Add Time -

Step 1: Click the Add Time button in the Actions Menu

Step 2: Select the days and times when you are available to meet with students.

Step 3: Select whether you will meet with students via appointments or drop-ins during that time. The campaign option is availability reserved specifically as dedicated time for targeted students to make appointments with you.

Step 4: Choose the location where you will be available.

Step 5: Lastly, select which student services you can provide to students during this availability. Note: Leaving this student services field empty means you will appear to be available for all advising student services.

Setting Up Your Availability

Step 6: Click the Save button.

Repeat this process until all of your availabilities have been defined.

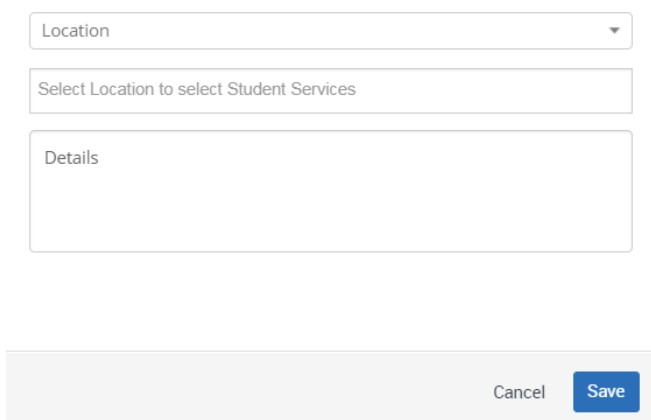
Note: You can have as much availability as needed.

There are two other options when adding Times Available.

Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button. 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 and click the Delete Time button.

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



Location

Select Location to select Student Services

Details

Cancel Save

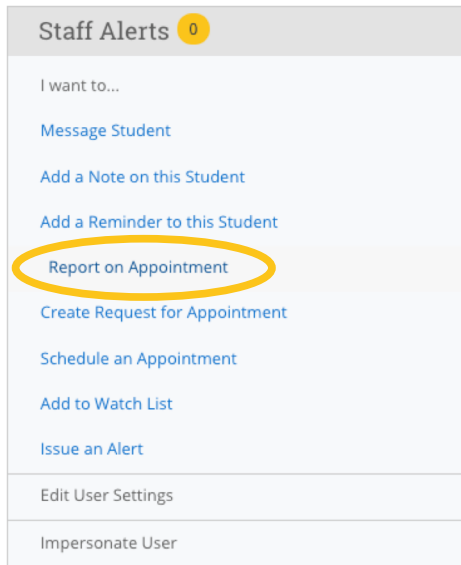
Tip –

Use the Details box under “Add Availability” to include personalized information, such as your office room number and location.

Report on Appointment

Advisor Training

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



Staff Alerts 0

I want to...

- Message Student
- Add a Note on this Student
- Add a Reminder to this Student
- Report on Appointment**
- Create Request for Appointment
- Schedule an Appointment
- Add to Watch List
- Issue an Alert

Edit User Settings

Impersonate User

Step 1: Find/select student's profile

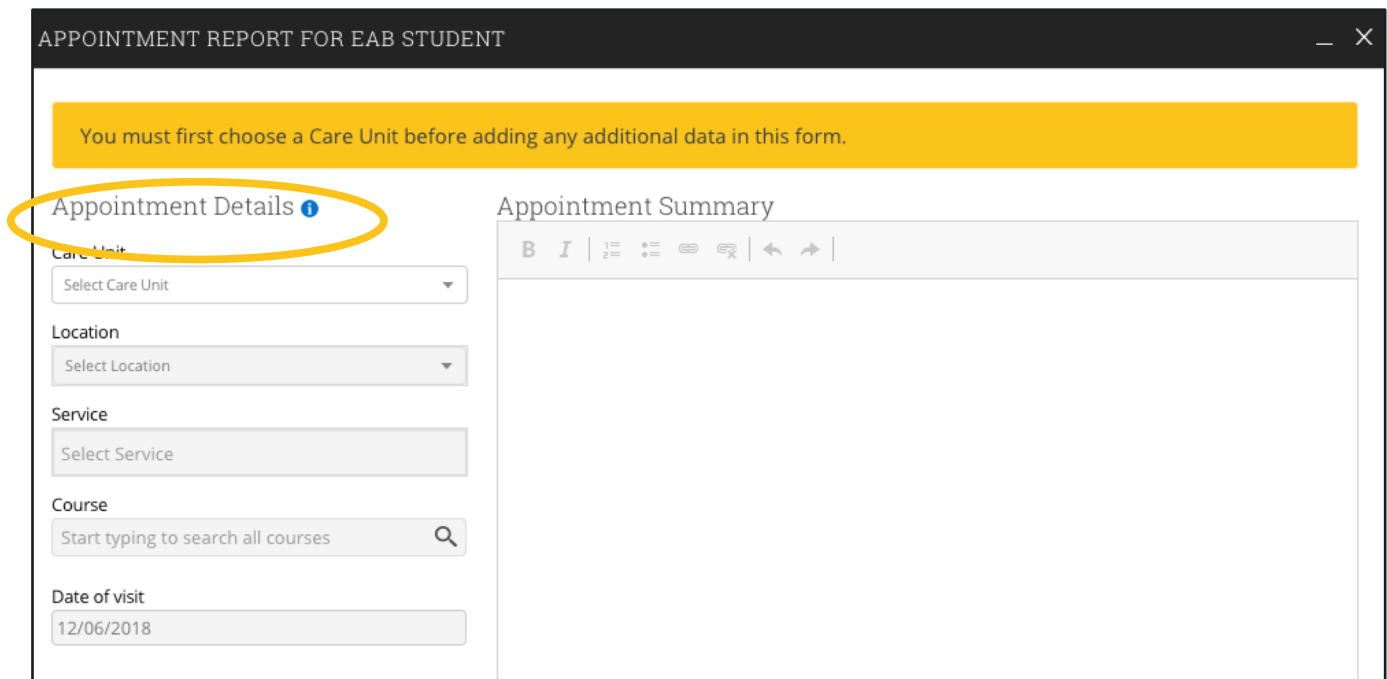
Step 2: On the right-hand side in the student's profile, click on Report on Appointment (circled on the left)

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

Step 4: You must first choose a Care Unit before adding any additional data in the window (circled below)

Step 5: Fill out all relative information about the appointment

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



APPOINTMENT REPORT FOR EAB STUDENT

You must first choose a Care Unit before adding any additional data in this form.

Appointment Details ⓘ

Care Unit
Select Care Unit

Location
Select Location

Service
Select Service

Course
Start typing to search all courses

Date of visit
12/06/2018

Appointment Summary

B I | | | | | | | |

Save this Report

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.

Overview	History	Class Info	Path	Academic Plan	More ▼
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Goals & Interests (supplied by the student)

Post Degree Goal ?
Start my career

Favorite Majors
None

Favorite Fields
Administrative and Support Services
Business
Finance

Career Priorities
1. High Job Demand
1. High Salary

Favorite Subjects
Business
Computers

Favorite Activities
Helping People
Managing and Organizing Things
Writing and Researching

Goals & Interests (supplied by the student)

Post Degree Goal ?
Transfer to a 4-year or other school

Favorite Majors
None

Favorite Fields
Computers
Health
Nutrition and Wellness

Career Priorities
1. High Job Demand
1. Match My Interests

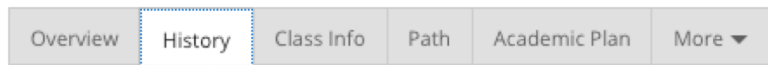
Favorite Subjects
Computers
English
Sports & Physical Education (P.E.)

Favorite Activities
Being Outdoors
Helping People
Keeping People Safe

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 ▾

▼ Expand All

Filter by Type

Dec 2018

Note Added ▾
Wed, Dec 5, 2018

Jennifer Hicks

End

History ▾

▼ Expand All

Filter by Type

Dec 2018

Note Added ▲
Wed, Dec 5, 2018

Jennifer Hicks

Comments:

1). I use what I have learned from old homework and the textbook to complete new assignments. **4**
2). When reading, I try to connect the things I am reading about with what I already know. **3**
3). I outline the chapters in my book or notes to help me study. **2**
4). I believe I will be successful in my courses. **4**
5). I know I will be able to learn the concepts and skills required for my major. **3**
6). When I have a hard time with a subject, I seek out help from others. **1**
7). The college has resources available to support me when I struggle. **4**
8). I am able to plan my day so that I have enough time to study and complete assignments. **2**
9). I do not worry about tests. **3**
10). I am confident in my ability to complete complex assignments. **3**

Attachments:

Key
Strongly disagree: 1
Disagree: 2
Neutral: 3
Agree: 4
Strongly Agree: 5

***Plan to discuss any that have 1 or 2 as a response.