



Quick Start Guide for Navigate

GETTING STARTED

1. Log in to Navigate using your SSO credentials!

<https://lehman-cuny.campus-training3.eab.com/> – available for training/practice

<https://lehman-cuny.campus.eab.com> – **Production link**

2. 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 Staff home screen - see Appendix A for detailed instructions on setting up your Availability.

KEY PLATFORM FEATURES

Perform These Key Actions to Identify, Communicate With, and Support Students – **update for features that will be available at go-live!**

- **Reference the Student Profile** – After clicking on a student's name through the search results, your Staff 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 Appointment 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 Staff home or search results, or from a student's profile.
- **Mass Email and Text a Group of Students** – Use 'Send a Message' from the 'Actions' drop-down to contact your advisees or other lists you've created in the platform.

Appendix A: Setting Up Your Availability

Availability

As a new user, the first thing you need to do is set up availability so that students can schedule appointments to see you. You should be setting a wide “theoretical” availability in Navigate, and then manage your actual availability in Outlook. For example, you can typically see students from 9:00 AM – 5:00 PM Monday through Friday, which would be your Navigate availability, but you will add busy time for lunch, doctors appointments, scheduled days off, and vacations in Outlook.

Staff Home New

Students | Upcoming Appointments | **My Availability**

Available Times i

| Actions | SELECT | DAYS OF WEEK | TIMES | DATES | LOCATION | PURPOSE | CARE UNIT | |
|---------|-----------------------|---------------|-------------|---------|---------------------|---|-----------|----------------------|
| | <input type="radio"/> | Mon, Tue, Wed | 8:00a-5:00p | Forever | My Advisor's Office | Changes to my Schedule For: Appointments/Drop-Ins/Campaigns | Advising | Edit |

ADD AVAILABILITY ×

When are you available to meet?

Mon | Tue | **Wed** | Thu | Fri | Sat | Sun

From: 8:00am To: 5:00pm

How long is this availability active?
Please select a duration

What type of availability is this?
Appointments | Drop-ins | Campaigns

Care Unit
Please select a care unit

Location
Please select a location

Services
Please select services

URL / Phone Number

Special Instructions for Student

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: 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.

Steps 6-8 Continued on next page...

Appendix A: Setting Up Your Availability

Special Instructions for Student

e.g. room 23, please bring paper

Step 6: Use the Special Instructions box under “Add Availability” to include personalized information, such as your office room number and location.

Step 7: Click the Save button.

Will you be meeting with multiple students?

These settings will not be used for kiosk and campaign purposes.

Max Number of Students per Appointment

1

Step 8: Repeat this process until all of your availabilities have been defined.

- You can have as much availability as needed.
- Creating multiple availabilities will enable you to set aside specific blocks for specific services (registration advising for example) or meeting types (drop ins vs. scheduled appointments)

Editing Availability:

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.

Group Appointments - You are now able to create availability for group appointments by indicating how many students are able to schedule into the same appointment.

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

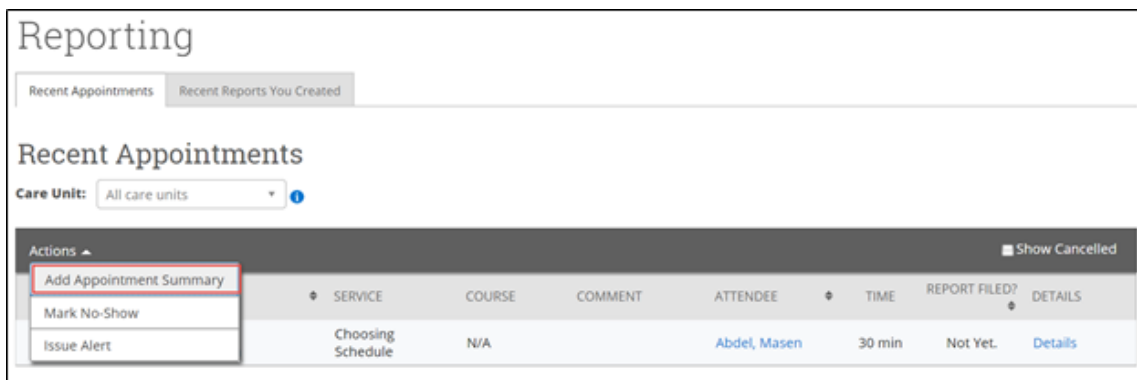
Appendix C: Add Advising Summary Reports

Documenting a Student Interaction

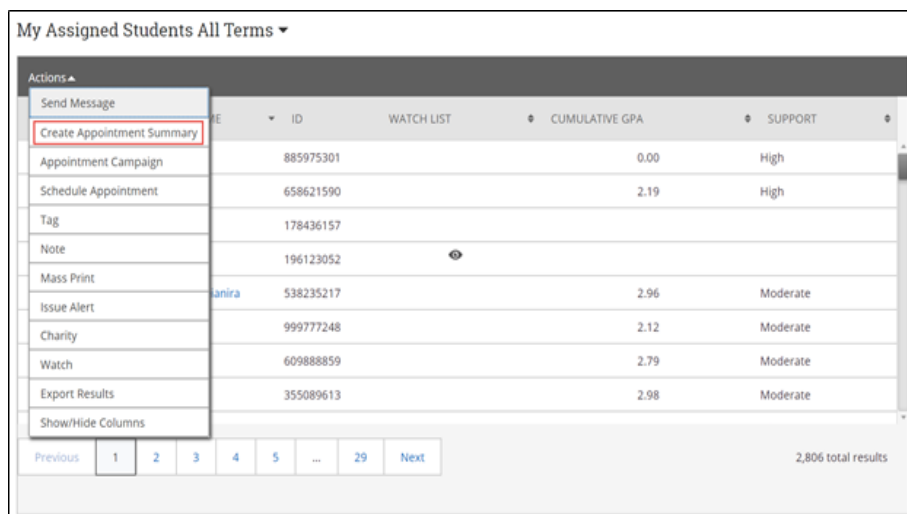
Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

For Scheduled Appointments: There are several different ways to create an Appointment Summary Report for scheduled appointments. **Add Appointment Summary** is an option in the Actions drop-down menu throughout the platform. The easiest way to access your appointments is from your Staff Home page. Under the **Students** tab on Staff Home, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Add Appointment Summary** from the Actions drop-down menu. You can also access this section from the **Upcoming Appointments** tab of Staff Home.

Note: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.



For Drop-in Appointments: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report for a walk-in appointment is from Staff Home or a student profile. Under the Students tab of Staff Home, find the specific student in your My Assigned Students section, or click the drop-down to find the student from one of your saved lists. From this section, you can click on a student and select Create Appointment Summary from the Actions drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.



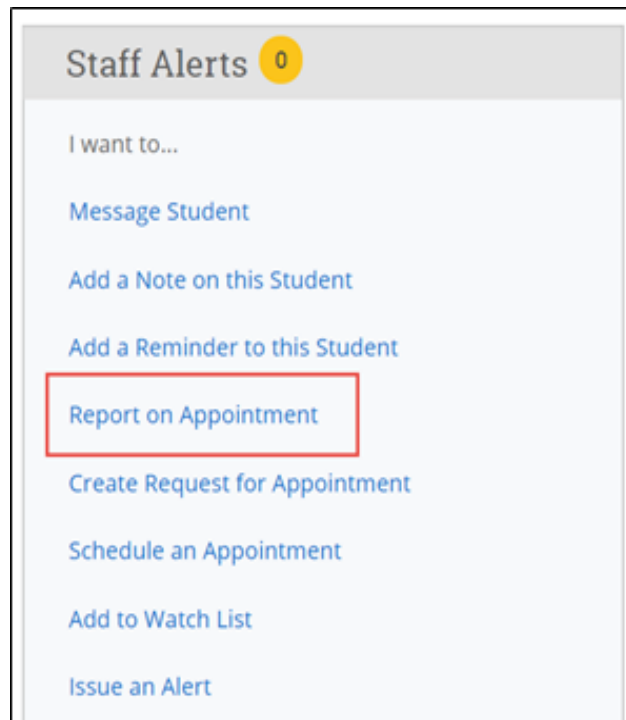
Appendix C: Add Advising Summary Reports

Documenting a Student Interaction

You can also create an ad hoc Appointment Summary Report from a student's profile page. Navigate to that specific student's profile and click **Report on Appointment** from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.

Reminder: When creating an ad-hoc Appointment Summary Report to track walk-in appointments, the Navigate platform will create the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, regardless of whether they were scheduled or walk-ins. If you sync your professional calendar to the Navigate platform, this appointment created in the past will also sync to that calendar.

For No-Show Appointments: The primary way to mark a student as a no-show for a scheduled appointment is from Staff Home. On the **Students** tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Mark No-Show** from the Actions drop down. You can also access this section from the **Upcoming Appointments** tab of your homepage. Marking a student as a no-show still adds a Summary Report to the appointment. The only difference is that the box next to the student's name called **Attended** will not be checked. See the screenshot below.



Important Note: Any information you enter into Navigate pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).

Appendix D: Mass Email and Text a Group of Students

Communicating with Students

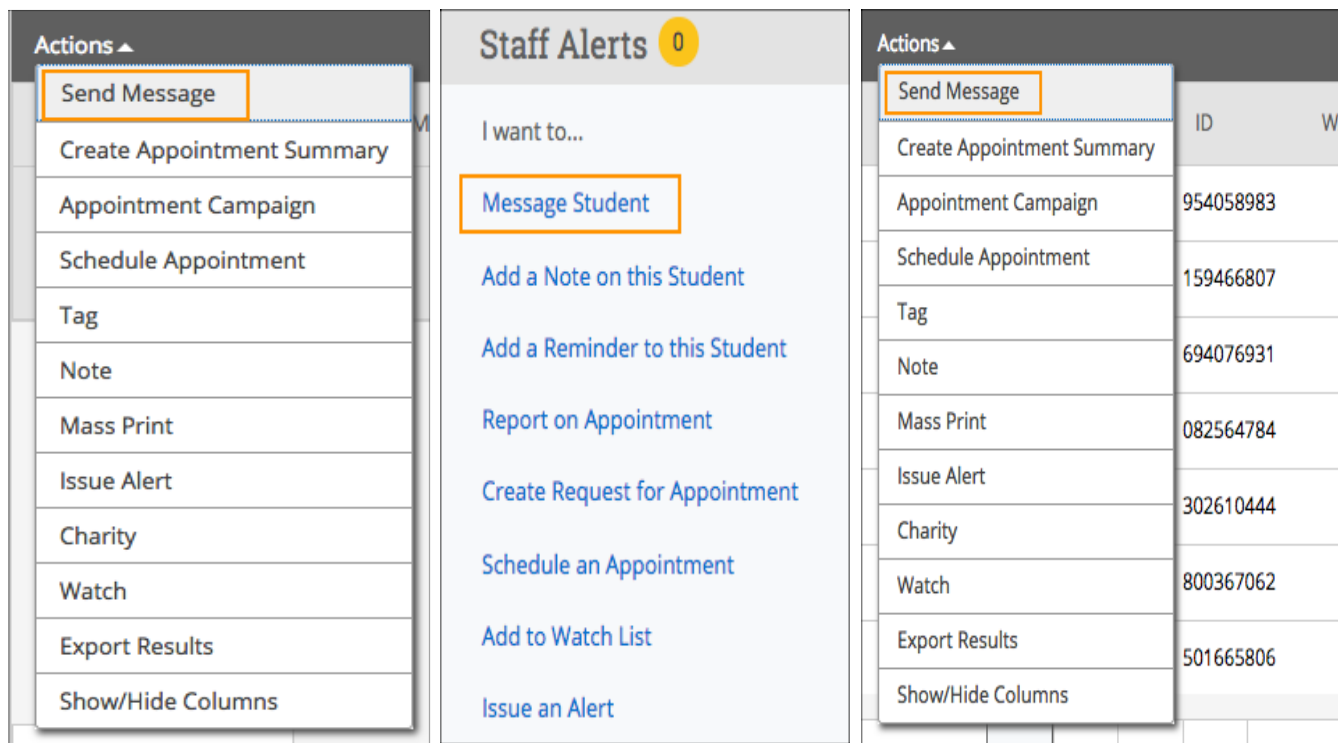
Navigate provides both **email** and **text messaging** for faculty and staff to communicate with students, either individually or en masse. Communicating with students through the platform creates records of those communication which can be accessible by other staff or faculty on your campus. In addition, it allows for a quick and easy way to communicate with more than one student at once.

Any faculty or staff member will only be able to view communications in which they have the proper permissions. Permissions allow users to either view only their own communications with students, or to view all communications with students. If you are unsure who can view your communications, contact your Application Administrator.

How do I send the emails or texts?

You can send emails or texts to one or more students from your staff homepage, the student profile, or the advanced search. Most "Actions" menus throughout the platform allow for sending emails or texts. See below for screenshots of each of these locations.

- Send a message from the Staff home page (fig. 1)
- Send a message from the Student home page (fig. 2)
- Send a message from the Advanced Search (fig. 3)



Important Note: If you do not see the option to Email or Text students, then your role does not have the proper permission for this action, or your institution decided not to allow texting. Please contact your Application Administrator with questions.

Appendix F: Creating a Recurring Meeting in Zoom with Waiting Room Enabled

Zoom Integration: During setup of virtual appointments, you will need to indicate the Zoom information where students will go for their advising appointment.

Schedule a Recurring Meeting:

- Topic: Full Name Advising Session (For example, Chris Buonocore’s Advising Session)
- Select ‘Recurring Meeting’
- Select ‘No Fixed time’
- Select ‘Generate Automatically’
- Select ‘Waiting Room’
- Choose your preferred video defaults and muting defaults
- Press Save

[My Meetings](#) > [Schedule a Meeting](#)

| | |
|------------------------|---|
| Topic | <input type="text" value="Chris Buonocore's Advising Session"/> |
| Description (Optional) | <input type="text" value="Enter your meeting description"/> |
| | <input checked="" type="checkbox"/> Recurring meeting |
| | Recurrence <input type="text" value="No Fixed Time"/> |
| Meeting ID | <input checked="" type="radio"/> Generate Automatically <input type="radio"/> Personal Meeting ID 927 284 4296 |
| Security | <input checked="" type="checkbox"/> Passcode <input type="text" value="583816"/> <small>Only users who have the invite link or passcode can join the meeting</small> |
| | <input checked="" type="checkbox"/> Waiting Room <small>Only users admitted by the host can join the meeting</small> |
| | <input type="checkbox"/> Require authentication to join |
| Video | Host <input checked="" type="radio"/> on <input type="radio"/> off Participant <input type="radio"/> on <input checked="" type="radio"/> off |
| Audio | <input type="radio"/> Telephone <input type="radio"/> Computer Audio <input checked="" type="radio"/> Both Dial from The United States Edit |
| Meeting Options | <input type="checkbox"/> Allow participants to join anytime <input checked="" type="checkbox"/> Mute participants upon entry |

Appendix F: Creating a Recurring Meeting in Zoom with Waiting Room Enabled

Waiting Rooms: In order to prevent multiple students from entering the same meeting at the same time, you must enable and customize your Waiting Room message.

How to customize Waiting Room messaging and logo:


- Log into Zoom in your browser
- Click 'Settings'
- Click the toggle to enable Waiting Room
- Under Waiting Room options, click 'Customize Waiting Room'
- Add a short message, the Lehman logo, and a longer message. See below for sample, customize to suit your style.
- Click the checkmarks



Customize Waiting Room

Meeting ID : 888-888-888

If you have an appointment, you will be admitted shortly.

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 [Your Meeting Topic]

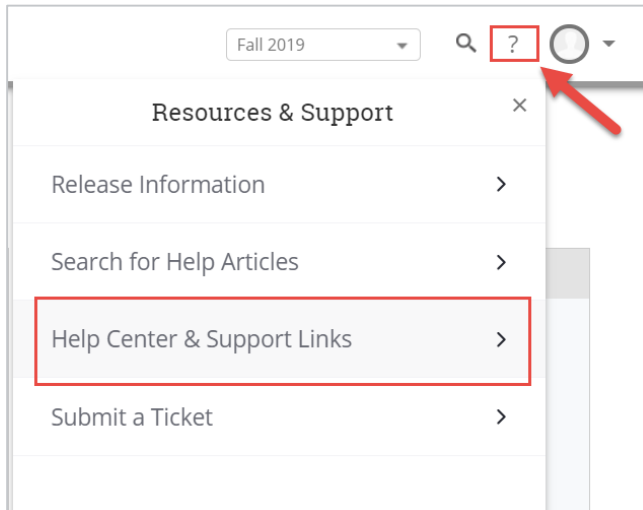
Thanks for scheduling an advising appointment with me! If your scheduled appointment is upcoming, I will admit you to the meeting when it is your turn, please be patient as I am with another student. Thank you!

211 / 400

Logo should be in GIF/JPG/PNG format. The file size cannot exceed 1MB
Logo minimum width or height is 60px and cannot exceed 400px

Need Help? Access EAB's Help Center

Visit the Navigate Help Center for articles and how-to instructions on all Navigate Features and Workflows.



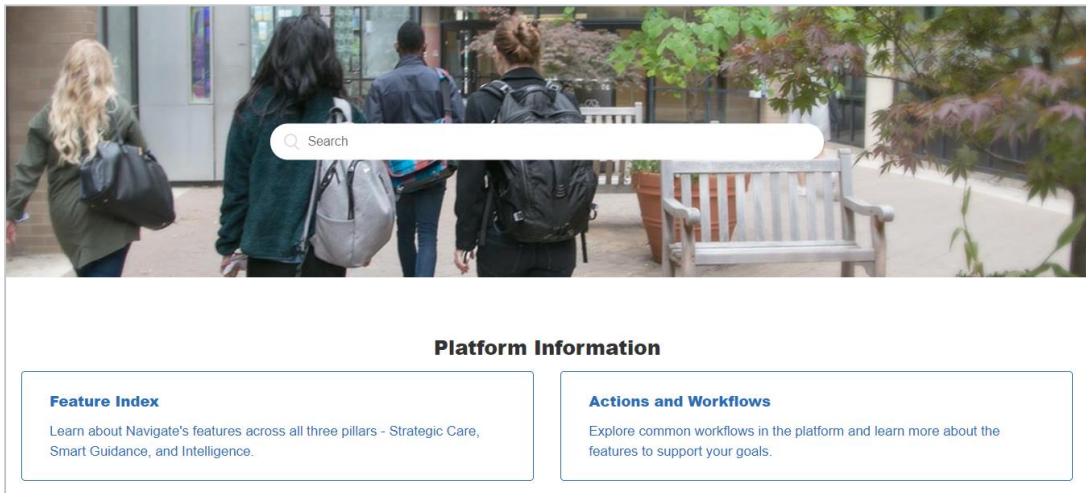
Accessing the Help Center -

Step 1: Log in to Navigate

Step 2: Click on the question mark icon in the top right hand corner.

Step 3: Click Help Center & Support Links from the drop down menu

Step 4: Select Help Center to be taken to articles and step by step instructions for Navigate features and workflows



Additional Questions? Email

Navigate.Support@lehman.cuny.edu for support!