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GETTING STARTED

ACCESS TO NAVIGATE
In order to get started using Navigate, a request must be submitted to the Navigate administrator, Sarah Matta smatta1@kennesaw.edu. The following information will be required:
Name
KSU email address
KSU ID number
Role (advisor, tutor, student assistant, front desk admin, etc.)

Once your profile has been created, you will have access to the Navigate platform and will access the platform via the following link:
https://kennesaw.campus.eab.com/home. You will use your Net ID and Password to login.

NAVIGATE SPECIALIST BY COLLEGE
Bagwell College of Education: Jessica Hood
College of Arch & CM: Janice Malone
College of Computing & Software Engineering: Aaron Parker
Coles College of Business: Greg Lawrance and Tyler Pede
College of the Arts: Amy Reynolds
College of Science & Math: David Marsh
Radow College of Humanities & Social Sciences: Hilary Battle and Matt Waller
Southern Polytechnic College of Engineering & Engineering Tech: Caitlin Filmore and Cat Groover
Wellstar College of Health & Human Services: Ansley Rowan
Owl Advising: Karen Sender
Institute for Cybersecurity: Kelley Price
Honors College: Justina Martin

**All troubleshooting or support requests must be submitted through your Navigate Specialist. If the Specialist is unable to troubleshoot, the issue will be forwarded to the Navigate administrator. Please include screenshots in your email. Do not reach out to EAB on your own.**
CALENDAR SYNC

Your first step will be to sync your Navigate calendar with your Outlook calendar. This initiates the two way sync between Navigate and Outlook. Click on My Calendar and then navigate to the Settings and Sync button. Next, click the blue Setup Sync button, and select Microsoft Office 365 (Latest Version). You will then need to sign into your account.

CREATING AVAILABILITY

The next step is to define the days, times, and services you will be able to meet with students.

Add Time

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

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

Note: You need to start your availability at the time you want to take your first student and end it at the time your last appointment will finish.

Step 3: Decide whether you would like this availability to be added to your personal availability link. This is a link you can send to students that will take them directly to your calendar to schedule an appointment with you.

Step 4: Select whether you will meet with students via appointments, drop-ins, and/or campaigns. Campaign availability is often reserved as dedicated time for targeted students to make appointments with you.
**Step 5:** Select which Meeting Types this availability is for (in-person, phone, and/or virtual).

**Step 6:** Care Unit: Advising

**Step 7:** Choose the location where you will be available.

**Step 8:** Select which services you are available for.

**Step 9:** Add a URL and/or phone number if applicable.

**Step 10:** Add any Special Instructions for students. This text needs to be kept short and concise.

**Step 11:** Click the Save button.

Repeat this process until all of your availability has been defined.

For similar availabilities, you can use the Copy Time option to quickly add more availability.
AVAILABILITY & CALENDAR

PERSONAL AVAILABILITY LINK

If you want to give students the opportunity to bypass scheduling an appointment via traditional scheduling, advisors have the option of utilizing a "Personal Availability Link". This link will take a student directly to an individual advisor's open appointment times. No other staff or services will be included.

When a new availability is set up, the advisor has the option of including that availability in their personal availability link. If it is not clicked, students will not see that availability as an option when scheduling.

Advisors can also choose to remove or add existing availabilities to the personal availability link.

---

Staff Home

Available Times
AVAILABILITY & CALENDAR

The direct link that can be sent to students can always be found on the Advisor Homepage under the My Availability tab. You can also quickly view which availabilities are added by looking at the Personal Link column.

Students included in an advising campaign can use this link to schedule a campaign-only time if campaign availability has been set up to be included within the personal availability link.

This link can be used in email signatures, website contact information, email campaigns, etc. to allow ease of scheduling for students.
The Staff Home is an advisor's landing page when logging into Navigate. From here, you can quickly review your upcoming appointments, message inbox, and minimized dialogs (reports to be completed).

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9. Lists and Saved Items
10. Analytics
11. Reporting
12. Administration
13. Checked-In Students
14. Message Inbox
15. Minimized Dialog Boxes
16. Quick Search
17. Assigned Students for a Term
18. My Scheduled Appointments
19. My Availability
20. Quick Links
21. Quick View of Upcoming Appointments
22. Appointment Center
Select a student and click on 'Schedule Advising Appointment' on the right-side menu to get to the scheduling grid.
2. Change the Care Unit to Academic Advising.
3. Below the Care Unit, select your location for appointment.
4. Below the Location, select the service for the appointment.
5. Select the dates on the calendar.
6. Select the organizer.
7. Search through the available dates until you are able to find one that does not conflict with the student's class schedule.
8. Once you find an appointment, click inside the checkbox.
9. Double check the Reminders on the left hand side and select the reminders you would like to send.
10. Click on the blue Save Appointment button.

**STEP-BY-STEP INSTRUCTIONS**
Under "Availabilities" select "Unlock Times With Conflicts". A checkbox will then open up allowing you to select a time with conflicts. Save the appointment as usual.
UPCOMING APPOINTMENTS

Your upcoming appointments can be viewed on both the Home Page as well as My Dashboard.

- Home Page
- My Dashboard
- Navigate Advisor Manual
**APPOINTMENT SCHEDULING**

**CANCELLING APPOINTMENTS**

1. From the Upcoming Appointments tab, click on Details next to each appointment.
2. Select Cancel Appointment at the bottom left of the window that appears.
3. After clicking on Cancel Appointment, the window will change to prompts you must fill out to cancel the appointment.
   a. 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.
   b. For the Reason option, select either Need to Reschedule or No Longer Needed. 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 an availability will not cancel existing appointments. It will only remove it from the list of options students see when scheduling new appointments.*
MOVING APPOINTMENTS

Open the appointment from your "Upcoming Appointments" tab and click "Details" next to the appointment you would like to move.

Remove the original advisor from the appointment and select the new staff member.
When the new staff member is selected, their availability will populate the "Choose a Time to Meet". Select the time for the appointment.

When finished, save the appointment. The appointment will now be moved from the original advisor's appointments to the new one.
APPOINTMENT SUMMARIES

DOCUMENTING A STUDENT INTERACTION

Navigate allows for an integrated campus-wide advising notes system. Benefits of widely accessible notes include improved communication, coordination, efficiency, transparency, and a more personalized student experience in advising. Appointment Summary Reports allow advisors to document information pertaining to a specific student appointment. A summary report can be created for an appointment scheduled in advance, a drop-in, or to mark a student as a no show.

ANATOMY OF AN APPOINTMENT SUMMARY REPORT

Care Unit: Indicates the Care Unit associated with the appointment (Advising, Tutoring, etc.). This field will be locked if scheduled in advance. If not, you must choose a Care Unit before you begin the report.

Location: The location/Advising Center where the appointment occurred. This field will be locked if scheduled in advance, or through an appointment campaign.

Service: Indicates the service associated with the appointment. Only services associated with the selected Location will display as options.

Meeting Type: Face-to-face, virtual, or phone

Date of Visit: The date the appointment occurred.

Meeting Start/End Time: For appointments scheduled in advance, the Meeting Start/End Time will default to the scheduled start and end time of the appointment. For drop-ins, the Meeting Start Time will default to the time the summary report was created and End Time is the time the summary report is saved. You can edit the fields as needed.

Check-in/Checkout: These fields will default to the times when the student checked in and checked out via Kiosk or Appointment Center. In cases where the student did not check in or check out for the appointment, the fields will remain blank. In cases where the student checked in but did not check out, the Checkout time will default to the time the summary report is saved.

Attendees: The checkboxes will be checked or not to indicate attendance for each appointment attendee. Not checking the box indicates a no show.

Attachments: This allows you to attach a file to the summary report, such as a DW page. The system will not allow attachments with certain special characters in the title.

Suggested Follow-up: These fields are used for informational purposes only. No appointment will be created as a result of filling them out.
APPONITMENT SUMMARIES

CREATING APPOINTMENT SUMMARY REPORTS

FOR SCHEDULED APPOINTMENTS

For scheduled appointments, there are several ways to create an Appointment Report. The "Create an Advising Report" box automatically opens when you start an appointment with a student.

A report can also be added after an appointment. At the bottom of the Advisor Home Page is your "Advisor Reporting" section. This is where you will find a list of all previous appointments and reports, both filed and need to be filed. To add a report, check the box next to the student's name, click on the Actions drop down menu, and select "Add Appointment Summary".

You can also add a summary report to an appointment in progress from the Appointment Queues tab of Staff Home. In this tab, the section Students Checked in for Appointments allows you to select a student who has arrived for their scheduled appointment and select Start Appointment from the drop-down menu. This will open the summary report dialogue box. If you wish to view other information in the platform during the appointment, you can minimize the dialogue box and return later.

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.
APPOINTMENT SUMMARIES

FOR DROP-IN APPOINTMENTS

There are several different ways to create an ad-hoc Appointment Summary Report for drop-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 drop-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.

You can also add a summary report to a drop in student appointment from the Appointment Queues tab of Staff Home. In this tab, the section “Students Checked In For Drop-Ins With Me” allows you to select a student who has dropped in to your specific queue and select Start Appointment from the drop-down menu. This will open the summary report dialogue box. If you wish to view other information in the platform during the appointment, you can minimize the dialogue box and return later.
APPPOINTMENT SUMMARIES

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.

Note: 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 drop-ins. If you sync your Outlook 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.
APPOINTMENT SUMMARIES

APPOINTMENT SUMMARY EXPECTATIONS

Advisors will complete appointment summary reports immediately following each advising appointment. An appointment is not considered completed until an appointment report has been saved.

The template below is used any time the Advising Care Unit is selected. Under Summary Details there are free-form text-boxes as well as check-boxes that must be completed for each appointment. There is also an Additional Information section.

Summary Details For Thanae Vlamis

Reason for Visit: 

Class Recommendations:

Referrals:

Next Steps for Advisor:

Student is confident in major choice.
Holds on student account have been addressed.
Student is successfully following expectations/milestones for degree.
Student is working more than 20 hours a week.
Student is thinking about post-graduate plans.

Yes or No Questions:

○ Yes ○ No ○ N/A

○ Yes ○ No ○ N/A

○ Yes ○ No ○ N/A

○ Yes ○ No ○ N/A

Yes or No Questions: You will need to complete each Yes/No question. If it doesn't apply to your student, please choose N/A.

Additional Information: Use this section to recap your appointment. Include any and all relevant information from your appointment that you feel would be beneficial for you and/or other members of the advising community to know when working with that student in the future.

SUMMARY DETAILS

Reason for Visit: Use this box to list the reason(s) for the appointment. You will need to use the Appointment Summary Index located on Page 40.

Class Recommendations: Use this box to list the courses you recommended the student register for next semester.

Referrals: Use this box in conjunction with the Appointment Summary Index (Page 40) to document any referrals you made.

Next Steps for Advisor: Use this box to list what items you are responsible for (e.g., removing holds, overrides, substitutions)

Additional Information: Use this section to recap your appointment. Include any and all relevant information from your appointment that you feel would be beneficial for you and/or other members of the advising community to know when working with that student in the future.
NOTES

Notes offer an additional mechanism to jot down information about a student, share information with other faculty and staff, and create a record of information provided directly to the student. Unlike summary reports, notes are not tied to specific appointments, and they do not have an integrated template. Because of their flexibility, notes can be utilized in a variety of ways. Some notes can be used to document any important information that should be visible to anyone working with the student, while Summary Reports are used to document certain types of meetings with students, such as academic advising appoints, tutoring sessions, and other services.

To create a note, navigate to a student's profile page and select Add a Note on this Student from the sidebar navigation on the right-hand side.

NOTE REASONS

When recording a note in Navigate, please select a note reason. This note reason allows notes to be categorized and tracked for reporting purposes. The following note reasons are currently available:

Email: Use this reason if you need to document an email from a student that is not already captured in the platform.
Other: Use this reason for any notes that do not fit into any of the other reasons.
Override: Use this reason to track any overrides given to a student outside of an appointment.
Phone Call: Use this reason for call campaigns.
Program Admission: Use this reason for any program admission related information.
Student Appointment Recap: Use this reason for your post-appointment follow-up notes and make it viewable to the student.

If you find yourself needing an additional Note Reason, please email Sarah Matta at smattal@kennesaw.edu.
ADVANCED SEARCH

By using the Advanced Search, you can search for a group of students by using many filters. Expand each bucket by clicking on the carets for each section. You can also paste a group of KSU IDs and/or KSU email addresses into the Keywords box, and pull a list of students.

New Search

<table>
<thead>
<tr>
<th>Saved Searches</th>
<th>Keywords (First Name, Last Name, E-mail, Student ID)?</th>
<th>Type? Students</th>
</tr>
</thead>
</table>

**Student Information** First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List

**Enrollment History** Enrollment Terms

**Area of Study** College/School, Degree, Concentration, Major

**Term Data** Section Tag, Term GPA

**Performance Data** GPA, Hours, Credits

**Course Data** Course, Section, Status

**Assigned To**

**Success Indicators** Predicted Support Level, Success Markers

- [ ] My Students Only
- [ ] Include Inactive

### Student Information

<table>
<thead>
<tr>
<th>Student Information</th>
<th>First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name?</td>
<td></td>
</tr>
<tr>
<td>Last Name?</td>
<td></td>
</tr>
<tr>
<td>From Last Name?</td>
<td></td>
</tr>
<tr>
<td>To Last Name?</td>
<td></td>
</tr>
<tr>
<td>Student ID?</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Race or Ethnicity</td>
<td></td>
</tr>
<tr>
<td>Student List (In Any of These)</td>
<td></td>
</tr>
<tr>
<td>Transfer Student</td>
<td></td>
</tr>
</tbody>
</table>

**E-mail(s)**

**Tag (In Any of these)**

**Category (In Any of these)**

- [ ] All

**Category**: This is where you will find holds, minors, Academic Standing, attributes, graduation petitions. Click on the + to open two additional options. One can be used to find students in ALL of the categories, the other is to find students who are NOT in any of the categories.
# Advanced Search

## Enrollment History

<table>
<thead>
<tr>
<th>Enrollment History</th>
<th>Enrollment Terms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Terms (In Any of these)</td>
<td>Enrollment Terms (In All of these)</td>
</tr>
<tr>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

**Enrollment Terms:** Use these filters to search for students who are/are not registered for any given semester.

## Area of Study

<table>
<thead>
<tr>
<th>Area of Study</th>
<th>College/School, Degree, Concentration, Major</th>
</tr>
</thead>
<tbody>
<tr>
<td>College/School (In Any of these)</td>
<td>All</td>
</tr>
<tr>
<td>Major (In Any of these)</td>
<td>All</td>
</tr>
<tr>
<td>Major (In All of these)</td>
<td>All</td>
</tr>
<tr>
<td>Major (In None of these)</td>
<td>All</td>
</tr>
<tr>
<td>Concentration (In Any of These)</td>
<td>All</td>
</tr>
<tr>
<td>Degree (In Any of These)</td>
<td>All</td>
</tr>
</tbody>
</table>

Once you select a college, all majors in that college will populate. Use the Major section to specify majors you would like to include. Using “Major (In All of these) will populate students with ALL of those majors listed. If you would like to find any students in a list of majors, use the first option, "Major (In Any of these)".

## Term Data

<table>
<thead>
<tr>
<th>Term Data</th>
<th>Section Tag, Term GPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term</td>
<td>Spring Semester 2022</td>
</tr>
<tr>
<td>Min. Credit Hours</td>
<td>0</td>
</tr>
<tr>
<td>Max. Credit Hours</td>
<td>999</td>
</tr>
<tr>
<td>Min. Term GPA</td>
<td>0.0000</td>
</tr>
<tr>
<td>Max. Term GPA</td>
<td>5.0000</td>
</tr>
<tr>
<td>Enrolled with Professor</td>
<td>All</td>
</tr>
<tr>
<td>Section Tagged With</td>
<td>All</td>
</tr>
</tbody>
</table>
**Advanced Search**

**Performance Data**

<table>
<thead>
<tr>
<th>Min. Cumulative GPA</th>
<th>Max. Cumulative GPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.0000</td>
<td>5.0000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Min. Credits Earned</th>
<th>Max. Credits Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>999</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Min. Hours Attempted</th>
<th>Max. Hours Attempted</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>999</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Min. Credit Comp. %</th>
<th>Max. Credit Comp. %</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>100</td>
</tr>
</tbody>
</table>

**Min./Max. Cumulative GPA**: You can use this section to find students in a certain GPA range. *This is KSU Adjusted GPA.*

**Min./Max. Hours Attempted**: Use this filter to find students who are registered for a certain number of credits.

**Course Data**

**Course Data**

<table>
<thead>
<tr>
<th>From Term</th>
<th>To Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring Seme...</td>
<td>Spring Seme...</td>
</tr>
</tbody>
</table>

Use this section to find students who are/are not registered for a certain course and students who have/have not completed a certain course.

**Assigned To**

<table>
<thead>
<tr>
<th>Student has relationship</th>
<th>Staff</th>
<th>Assigned to Team Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any</td>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

**Success Indicators**

**Success Indicators**

<table>
<thead>
<tr>
<th>Predicted Support Level (In Any of these)</th>
<th>Success Marker (In All of these)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Min. # of Missed Success Markers</th>
<th>Max. # of Missed Success Markers</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>999</td>
</tr>
</tbody>
</table>

Note: You can save any search which will save the parameters you've entered. This will allow for you to quickly re-run the same search without needing to manually enter the parameters every time.
LISTS

SAVED STUDENT LISTS

In the event you wish to save a list of students and do not necessarily care about their attributes, you will want to create a Student List. A student list is a static group of students that you can continually monitor over time.

To create a student list, run your Advanced Search and select the students you wish to add by selecting the gray box next to their name or select all students on that page by clicking the box next to Name in the gray bar. If you would like to select ALL students in your search, click on the Select all 246 items above the gray bar.

After selecting your students, click on the Actions Menu and click on Add to Student List. You may either add students to an existing Student List, or Create new list. Once you name your list, click Save. You have saved a static list of students that will not change over time.
LISTS

ACCESSING STUDENT LISTS

Once you’ve created a Saved Search and/or Student List, there are several areas you may access them.

HOME PAGE

Click on the caret next to Assigned Students and you will be able to select from any of your saved searched or student lists.

LISTS & SAVED ITEMS

Your Student Lists and Saved Searches also have their own tab. You may find it under the Navigation menu as "Lists & Saved Items"
LISTS

IN THE ADVANCED SEARCH
Saved Search: From the Advanced Search, you may access any of your previous saved searches to run by clicking on the caret next to Saved Searches.

Student List: Under the Student Information tab, you may select one or more of your student lists as a search filter.
LISTS

UPLOADING A LIST

If you are not building your watch list from search results then navigate to the Lists & Searches icon. In the Actions dropdown under Student Lists is the option to upload a student list from an external spreadsheet. There are step by step directions for the upload process once chosen.

You can choose to either start a New Student List or select an existing list.

The file must be saved as a .csv file in order to upload to a student list.
REPORTING

Below is a comprehensive list of reports you can pull from within Navigate. In each report, you can filter the results using the Advanced Search filters. Each report can be exported to Excel, and you can hide/show the specific columns you would like to be in your report.

APPOINTMENTS/VISITS REPORTS

Appointments: This report will show any appointment, scheduled or drop-in, created by a user.

Appointment Summaries: This report will show any appointment summary created by a user.

Appointment Campaigns: This report will show any appointment campaign invitation sent by a user in the platform.

Check-Ins: This report will show any check In for a visit, including: Appointments, track time, and record visit check-ins.

INTERVENTION REPORTS

Alerts: This report includes any Alert created by a user within the platform, along with any details associated with the Alert. This report includes all Alerts, created through a campaign or ad hoc.

Cases: This report will show any Case created by a user within the platform, along with any details associated with that Case.

Progress Reports: This report will show any Progress Reports and Progress Report responses created by a user within the platform.

Progress Report Campaigns: This report will show all progress report campaign requests and response information.

Enrollment Census: This report includes any Enrollment Census response created by a user within the platform.

STUDENT DATA REPORTS

Notes: This report will show any Note created by a user within the platform.
REPORTING

**Student Enrollments**: This report will show any Enrollments a student has within the selected term.

**Student Info (Students Active for Term)**: This report will show general information for Students in the platform.

**STAFF REPORTS**

**Availabilities**: This report will show any appointment, campaign, or drop-in availability created by a user within the platform that have start and end dates within the date range chosen. Users with certain permissions may use this report to create and edit availability for other users.
STUDENT PROFILE

Accessing the Student Profile is the page you will use to review a student's reports and notes, progress reports, course history, and to see if they have any upcoming appointments with another office.

1. **Overview**: Main Menu.
2. **Success Progress**: Measures Success Markers and Trends.
3. **History**: Review past notes and reports.
4. **Courses**: Course History.
5. **More**: Includes Calendar, Study Hall, Appointments, and Conversations.
6. **Total number of D or F grades**.
7. **Total number of Repeated courses**.
8. **Total number of Withdrawn courses**.
9. **Cumulative GPA**.
10. **Quick Staff Links**.
11. **Total Earned Credit Hours**.
12. **Current Major and/or Minor**.
13. **Most recent semester attended**.
14. **Active campaigns** student is enrolled in.
15. **Categories** student is in.
16. **Direct links to student records**.
17. **Student contact information**.
18. **Success members** including advisors and faculty.

Note: Student Name Is Preferred Name.
SUCCESS PROGRESS

The Success Progress page will give you an overview of the student's GPA and credit enrollment trends.
STUDENT PROFILE

HISTORY
The History page will allow you to review all previous appointment reports and notes.

If you need to submit a report or note that was not a scheduled appointment, use either the "Add a Note on this Student" or "Report on Appointment" in the right-side Staff menu.
STUDENT PROFILE

COURSES

The Courses page will give you a student's enrollment history, final grades, as well as their current enrollment. If the student KSU as a first-year student their pre-enrollment information such as high school GPA and test scores will also be listed.

APPOINTMENTS

From the More drop-down menu, select Appointments to see a student's recent and upcoming appointments.
APPPOINTMENT CAMPAIGNS

Navigating to Campaigns: While on the staff home screen, select “Appointment Campaigns” from the left-hand side Quick Links section. This will take you to the Campaigns tab. From there, select Appointment Campaign from the right-hand side, under Actions.

Define Campaign:
- **Name** your campaign (Students will not see the name of the campaign)
- Select “Advising” as the Care Unit (or the applicable Care Unit for your campaign)
- **Location** - Choose your location. NOTE: Ensure that for the campaign availability you have created under “My Availability” you have selected that you will be available in the same location (Advisor’s office).
- Under “Service”, choose the services for which you are available. NOTE: This must match the availability you have set up on your staff home page, under “My Availability”.
- **Begin Date and End Date** - choose the date range for which you want the campaign to run. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired. NOTE: This must match the availability you have set up on your staff home page, under “My Availability”.
- **Appointment Limit** - how many appointments can the student schedule for the campaign? (default is 1)
- **Appointment Length** - how long do you want the appointment to last?
- **Select 1 slot per time** (select more if you’d like more than 1 student to select the same time slot)

Adding Students: Use the advanced search feature to search for students you would like to participate in the campaign. Or choose one of your saved searches by clicking the drop-down arrow beside “Saved Searches”.

Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under “Add Advisors to Campaign”. If applicable, select other advisors to join your campaign.

Compose Your Message:
- Create a Subject Line for your email
- In the next box, edit the text for the email. Default is “Please schedule your advising appointment”. NOTE: Always be sure to keep the Schedule Link in your email body, if that is removed students will be unable to schedule appointments.

Confirm & Send: Review the details of your campaign. When you are ready, click send to issue the email to students on the list.
APPOINTMENT CAMPAIGNS

Campaigns

Student Campaigns
Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns
Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are most deployed by staff members seeking to encourage students to meet with advisors for advising or other services.

Email Campaigns
Send a group of students on specified dates about certain things they may need to do or attend.

Staff Campaigns
Staff Campaigns are campaigns that can be sent directly to Staff users to complete a specific action and track outcomes for each campaign.

Progress Report Campaigns
Progress Report Campaigns identify potential barriers to student success through instructor feedback. Progress Report Campaigns are initiated by staff in order to collect information from instructors.

Enrollment Census Campaigns
Enrollment Censuses let you monitor student attendance patterns, including which students attended class and the date of their last attendance.

Campaign Configurations
- Campaign Name
- Instructions or Notes for Landing Page
- Location
- Select Location
- Service
- Select Service

Appointment Configurations
- Appointment Limit
- Appointment Length
- Start Date
- End Date
- Staff Reminder:
  - Email
  - Text

Scheduling Window
Campaign appointments can be scheduled on any day within the scheduling window. Your campaign will begin automatiately on the date of your firstudge.
My Dashboard will be your main hub for managing your students, appointments, and campaigns.

Dashboard Tiles Include:
- My Students
  - You can toggle between assigned students as well as Watch Lists
  - You can view either their Predicted Support level or their Appointments Completed-Last 90 Days
- My Assigned Students Activity Feed
- My Appointment Summaries Pending
- My Appointment Campaigns
- My Enrolled Students
- My Upcoming Appointments
- My Enrollment Campaigns

Tiles can be added or removed via the settings options in the top right-hand corner.

**MY STUDENTS**
Select a chart to view a summary about your students including appointment status over the last 90 days and support score.

**MY ASSIGNED STUDENTS FEED**
View activity for your assigned students. Activity includes: newly assigned students, upcoming and past Appointments, new or closed Alerts, new or closed Cases, new Progress Reports, new Notes, new Appointment Summaries. Filter by activity type to include only those you wish.

**MY DASHBOARD**

**Tile Settings**
- **My Students**
  - Select a chart to view a summary about your students including appointment status over the last 90 days and support score. Appropriate permissions may be needed to view score data.
  - Use the toggle to view data in a tabular format or click on the chart elements to view associated students in each category.
- **My Assigned Students Activity Feed**
  - View activity for your assigned students. Activity includes: newly assigned students, upcoming and past Appointments, new or closed Alerts, new or closed Cases, new Progress Reports, new Notes, new Appointment Summaries. Filter by activity type to include only those you wish.
- **My Appointment Summaries Pending**
  - View your appointments completed in the past 90 days without an appointment summary. Click on a student name to go to the student profile or click the ‘All Recent Appointments’ link to manage recent appointments.
- **My Appointment Campaigns**
  - View all of your active Appointment Campaigns and their associated performance metrics. Click on the campaign name to view details.
- **My Enrollment Campaigns**
  - View all of your active Enrollment Campaigns and their associated enrollment rules. Click on the campaign name to view details.
- **My Enrolled Students**
  - Enroll data on your students for the current term and next term. Select term and click chart for more information.
- **My Upcoming Appointments**
  - View all Upcoming Appointments.
MY DASHBOARD

MY APPOINTMENT SUMMARIES PENDING
View your appointments completed in the past 90 days without an appointment summary. Click on a student name to go to the student profile, or click the "All Recent Appointments" link to manage recent appointments.

MY APPOINTMENT CAMPAIGNS
View all of your active Appointment Campaigns and their associated performance metrics. Click on the campaign name to view details.

MY ENROLLMENT CAMPAIGNS
View all of your active Enrollment Campaigns and their associated enrollment rates. Click on the campaign name to view details.

MY ENROLLED STUDENTS
Enrollment data on your students for the current term and next term. Select term and click chart for more information.

MY UPCOMING APPOINTMENTS
View All Upcoming Appointments
## Glossary of Terms

### User Roles
- A defined set of permissions for individuals using Navigate (e.g., “Advisors” or “Instructors”).

### Availability
- Times an Advisor or Tutor sets within Navigate to allow scheduling. This can be for Drop-ins, Appointments, or Campaigns.

### Action Menu
- Menu housing the primary coordination functions, such as communication, appointment scheduling, campaigns, and case management.

### Location
- Specific area or major on campus for which an advisor would see students (not a physical location).

### Categories
- Differentiating factors captured in a school’s SIS system (e.g., Veterans, Athletes, Greek life).

### Notes
- A relevant piece of information attached to a student’s profile in Navigate.

### Tags
- Subjective information not captured in an SIS system (e.g., Students interested in taking GRE’s or MCAT’s).

### Lists/Student Lists
- Dynamic or static list of students that users can create and consistently access in the platform.

### Advanced Search
- Search engine that allows users to enter thousands of search parameters to allow for segmentation of the member’s student population.

### Summary Reports
- Summary of the content discussed during a tutoring or advising session and logged in to Navigate.

### Progress Reports
- Also referred to as “Early Alerts;” enables a professor or instructor to indicate how a specific student is performing in class.

### Alerts
- A mechanism for any user (not just a professor or instructor) to draw attention to a student who may potentially be a risk due to a variety of factors.

### Cases
- A coordinated request across users prompting action and follow up on an alert, indicating a student is at risk. Often crosses department lines and includes areas such as Financial Aid, Counseling, etc.

### Campaign
- Proactive outreach strategy with a specific goal in mind, such as “Reenroll students not yet registered for Fall.”

### Kiosk
- Workflow hub for both Advising Centers and Tutor Centers.

### Appointment Center
- Dashboard used by Front Desk and Administration workers to manage the schedules and appointments of Advisors and Tutors.
Use the abbreviated terminology associated with each reason or referral below to complete an Appointment Summary Report. Using these abbreviations will allow for easy reporting and tracking.

**REASON FOR VISIT**

- AH: Advising (AH) Hold
- RZ: Readmit Advising
- LS: Learning Support
- PROB: Probation
- EA: Early Alert
- W: Withdrawal
- PRE: Pre-orientation
- MAJOR: Change of major, major exploration
- SUB: Substitutions
- REG: Registration assistance, schedule adjustments
- SA: Study Abroad
- GRAD: Graduation plan
- SAP: SAP Appeal
- REPEAT: Repeat request
- CPoS: Course Program of Study
- GATE: Program admission
- COLES: Coles mandatory advising

**REFERRALS**

- FA: Financial Aid
- REG: Registrar
- CAPS: Counseling & Psychological Services
- SDS: Student Disability Services
- CPD: Career Planning & Development
- SMART: SMART Center Tutoring
- WC: Writing Center
- CCSE LAB: CCSE Tutoring
- STAT LAB: Statistics Lab Tutoring
- PSYC LAB: Psychology Lab Tutoring
- CCB TUTOR: Coles Tutoring Center
- PROF: Professor Office Hours
- SA: Study Abroad
- WLRC: World Language Resource Collection
- RES: Housing & Residence Life
- PFL: President's Focused Learner
- CACM ADV: College of Arch & CM Advising
- BCE ADV: Bagwell Education Advising
- CCB ADV: Coles Advising
- COTA ADV: College of the Arts Advising
- CSM ADV: Science & Math Advising
- RCHSS ADV: Humanities Advising
- SPCEET ADV: Eng. & Eng. Tech Advising
- HHS ADV: Wellstar Advising
- OWL ADV: Owl Advising
- DE ADV: Dual Enrollment Advising
- CYB ADV: Cyber Advising
- HON ADV: Honors Advising
- SASS ADV: Student-Athlete Advising

*If you find yourself needing an additional Reason or Referral, please email Sarah Matta at smatta1@kennesaw.edu.*