SOUTH DAKOTA MINES

Getting Started

1. **Log in to Navigate using your SSO credentials**
   sdsmt.campus.eab.com ⧉ – start using on 1/19/21

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.
   - **Sync Your Calendar** – This initiates the two way sync between Navigate and your calendar. See Appendix B for detailed instructions.

Key Platform Features

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

- **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.

- **Create an Appointment Campaign** – Use this to invite students set up an appointment during times you have designated

  - From the 'Actions' menu on your list, select 'Appointment Campaign.'
    See Appendix E for detailed instructions on creating a campaign.

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. It is important to note that locations and services are created by university administrators.

Staff Home *New*

Students   Upcoming Appointments   My Availability

Available Times ⓘ

Actions ▾

SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
○	Mon, Tue, Wed	8:00a-5:00p	Forever	My Advisor's Office	Changes to my Schedule For: Appointments/Drop-Ins/Campaigns	Advising	Edit

Add Time

1   Click the Add Time button in the Actions Menu.

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

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.

4   Choose the location where you will be available.

5   Select which student services you can provide to students during this availability. **Note:** You must select at least one service to save the availability.

Steps 6-8 continued on next page

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**

Appendix A: Setting Up Your Availability

Add Time (Continued)

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

7 Click the Save button.

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.

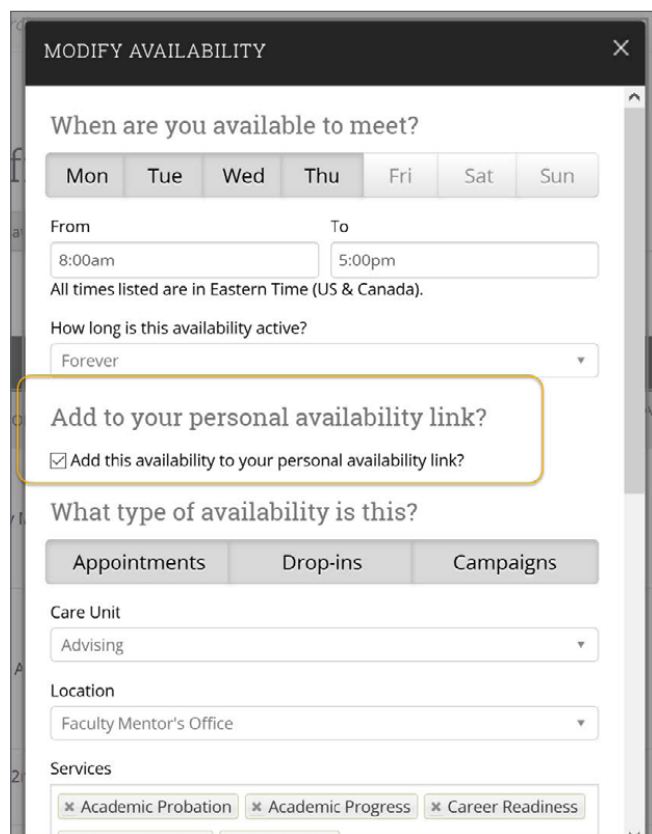**Inactive Availabilities** – These are highlighted in red in the Times Available grid.

Appendix A: Setting Up Personal Availability Links

Personal Availability Links (PAL) are a useful tool for scheduling. Each PAL is unique to a staff member in Navigate. The link does not change over time.

When you include a PAL in a URL field, website, email, or SMS and students click the link, they are taken to the **New Appointment** page in student scheduling. The link redirects to the scheduling page in the student's browser and asks if they want to continue in the browser or open Navigate Student app.

Personal Availability Link

Link: 🔗 https://umfk.campus-training3.eab.com/pal/QP6Iv4tym5 [Copy]

Your Care Units and Services are pre selected. Students then see the available times that you have to meet. The student will only see the Care Unit, Services, and Locations and times hat you have selected to be part of your PAL. All configurations, limitations, and permissions for the availabilities remain in effect.
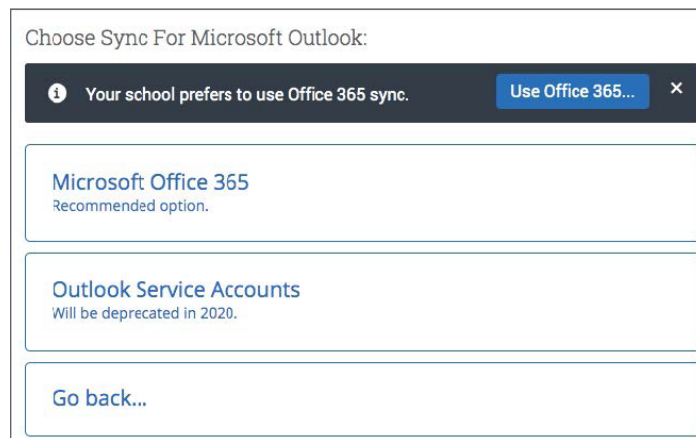
Adding Availability to your PAL

To apply an availability to your Personal Availability Link, you need to check the **Add this availability to your personal availability** link box when creating or editing an availability or select existing availabilities and choose Add to Personal Link from the Actions menu.

---

sdsmt.edu/Academics/Hardrocker-Success   **Having technical difficulties?** Email HardrockerSuccess@sdsmt.edu
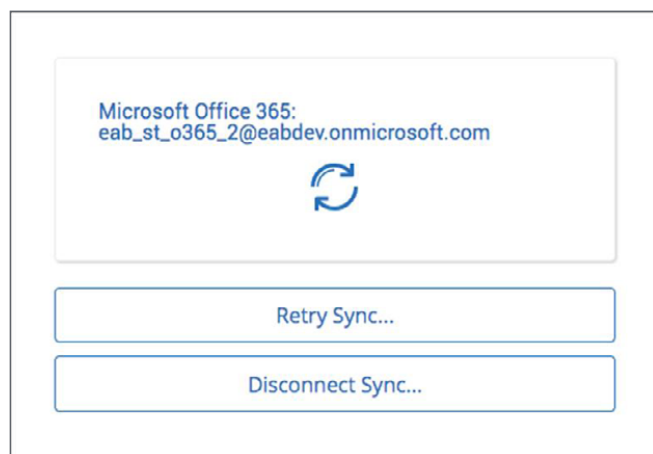
Appendix B: Sync Your Outlook Calendar
Integrating Your Calendar

The availability you set up within Navigate dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate to your personal calendar.

1 Toggle to the calendar page within Navigate using the calendar icon on the left side toolbar.

2 Select **Settings and Sync** on the top right side of the page.

3 Click **Setup Sync**. You will see a "Your school prefers to use Office 365 sync" banner on Calendar with a "Use Office 365..." button to begin the setup.

Choose Sync For Microsoft Outlook:

ⓘ Your school prefers to use Office 365 sync.   Use Office 365...   ✕

Microsoft Office 365
Recommended option.

Outlook Service Accounts
Will be deprecated in 2020.

Go back...

4 Upon clicking the button, you will be routed to login.microsoftonline.com. If you are not already signed into Office 365, you will be prompted to sign in.

5 After signing in, Office 365 will ask you to grant permission for the application to access your calendar. Pressing **"Accept"** will authorize and begin the syncing.

Microsoft Office 365:
eab_st_o365_2@eabdev.onmicrosoft.com

Retry Sync...

Disconnect Sync...

The browser will return to the Calendar Integrations page. The "Exchange Integration" tab will no longer appear. The "Office365 Integration" tab will now show the timestamp for the last successful sync (or any applicable error message) and will include options for you to Retry or Disconnect the sync as needed.

The Two Way Sync will enable that any agenda item created from Navigate will sync back to your Outlook Calendar. All existing events and events that are created from your Outlook Calendar will be shown as 'Busy' in Navigate.
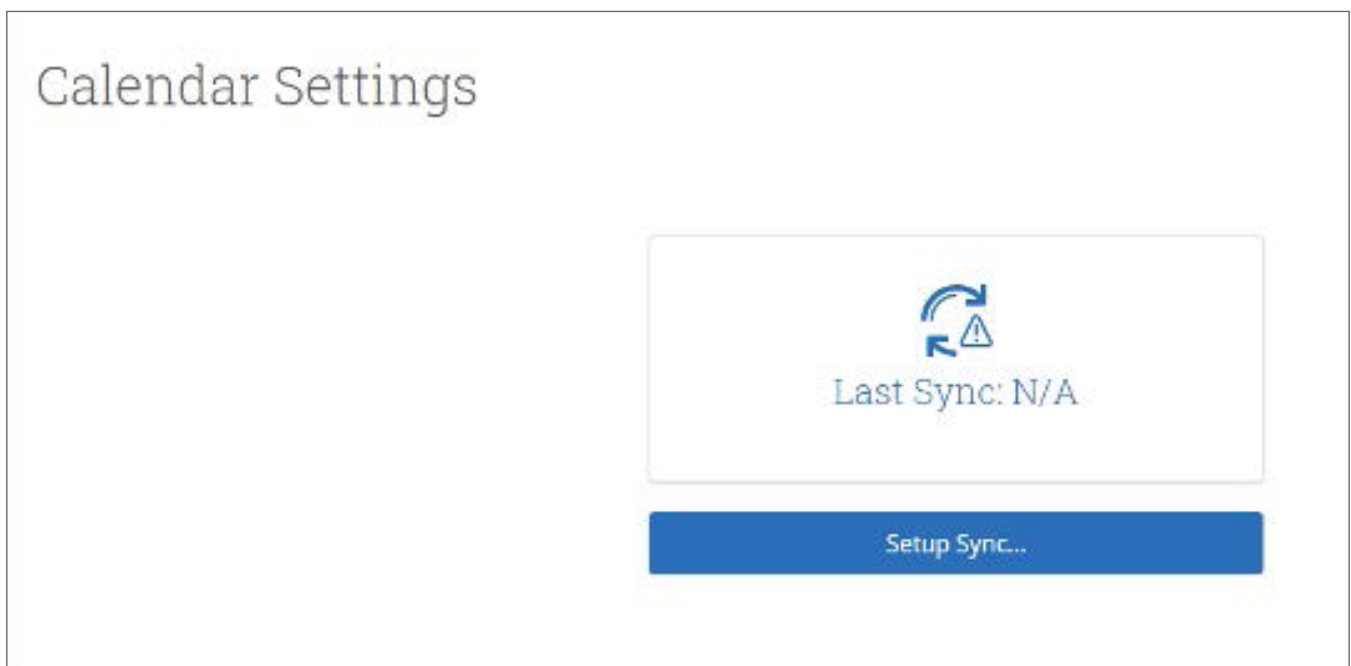
Appendix B: Sync Your Outlook Calendar
Integrating Your Calendar

The availability you set up within Navigate dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the Navigate platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in Navigate to your personal calendar.

Select the calendar icon in the left navigation bar. Once on the My Calendar page, select the **Settings and Sync** button.
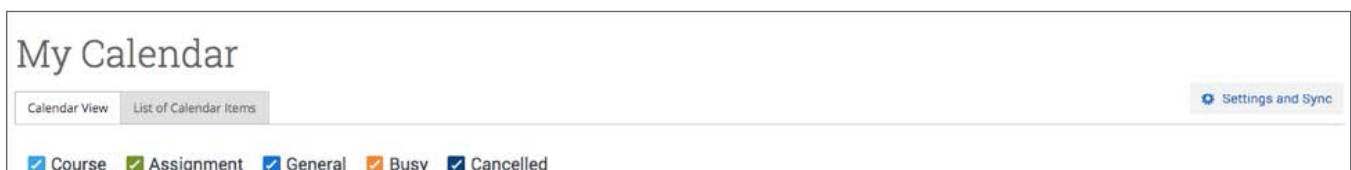
On the Calendar Settings page, select **Setup Sync...**

Appendix B: Sync Your Outlook Calendar
Integrating Your Calendar

If you see the following screen, click the button that says **Use Office365 (Latest Version)** at the top of the list of options, as shown in the figure below.
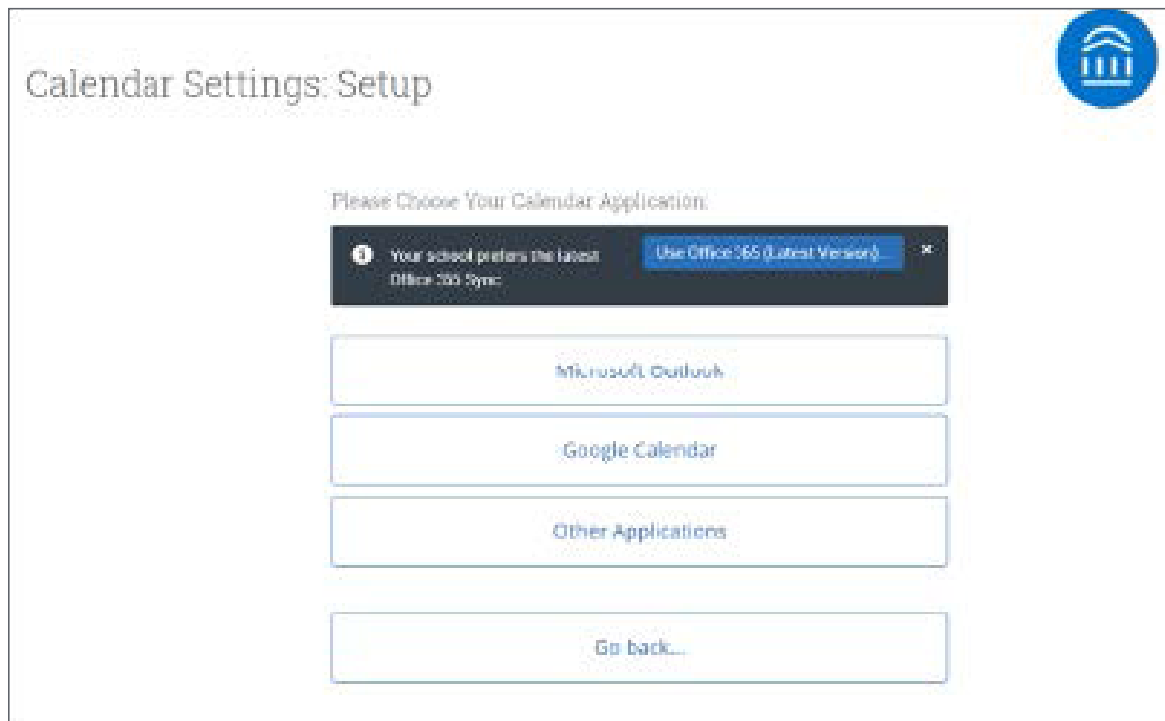

If you click **Microsoft Outlook** instead of the **Use Office365 (Latest Version)** button, you choose your Microsoft Outlook sync. Select **Microsoft Office 365 (Latest Version)** from the options.
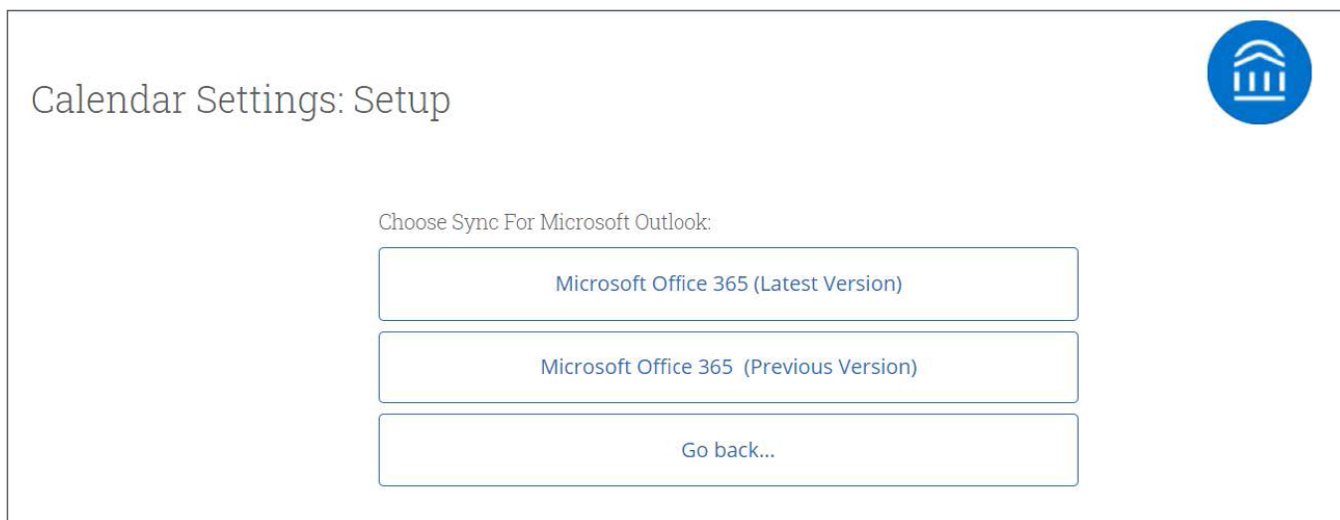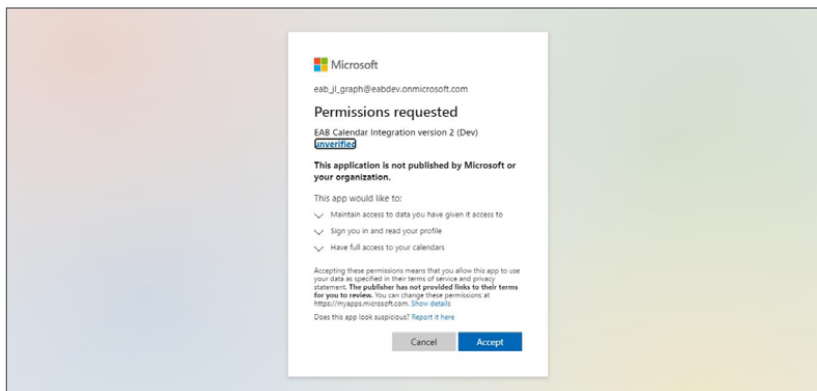
Appendix B: Sync Your Outlook Calendar
Integrating Your Calendar

Regardless of which method you choose, the Microsoft login and authorization page opens. The page tells you to pick an account. Choose your professional account.
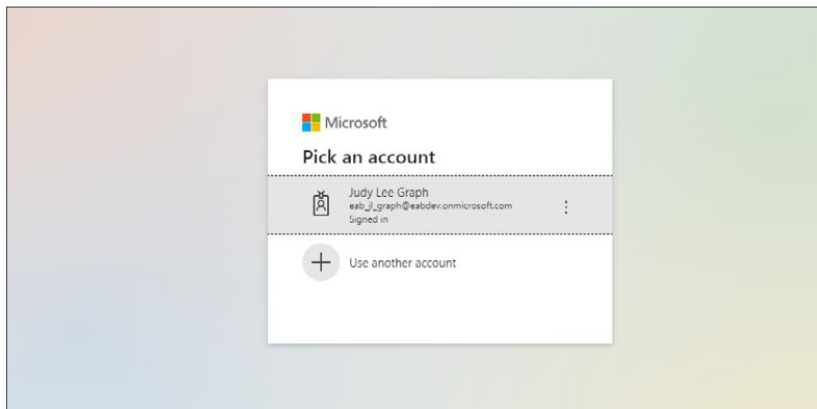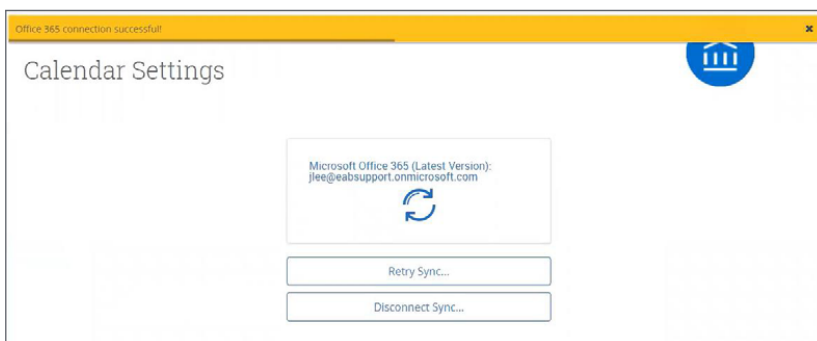

If you log in successfully, you see a page requesting permissions.

Select **Accept**.

The page redirects to the Navigate Calendar Settings page, with a success message and information about the sync on display.

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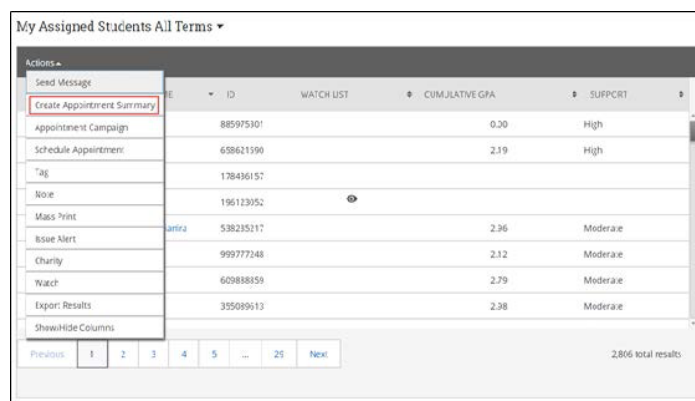
Note: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad hoc, to ensure the Summary Report is tied to that specific appointment.

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.
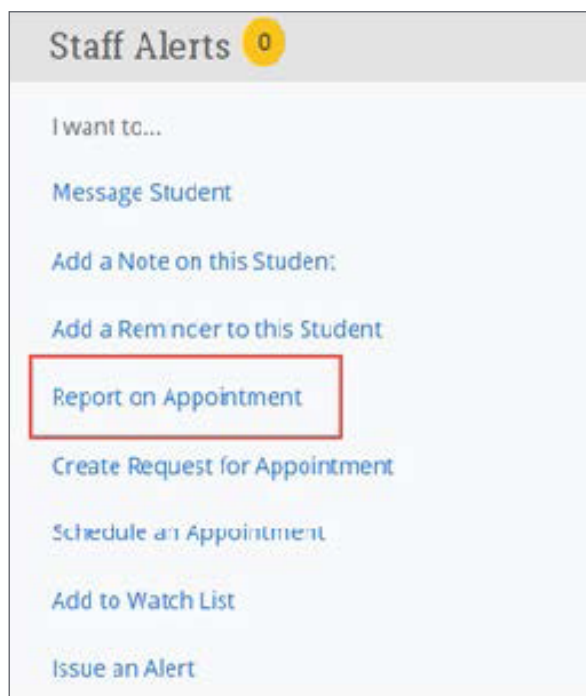
For No Show Appointments

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
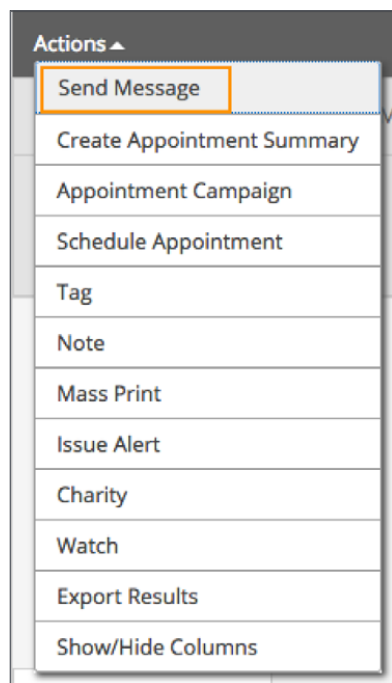## Communicating with Students

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.
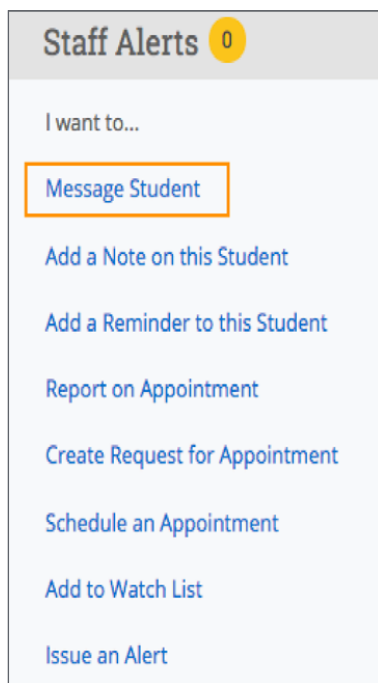
How do I send the emails or texts?

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.
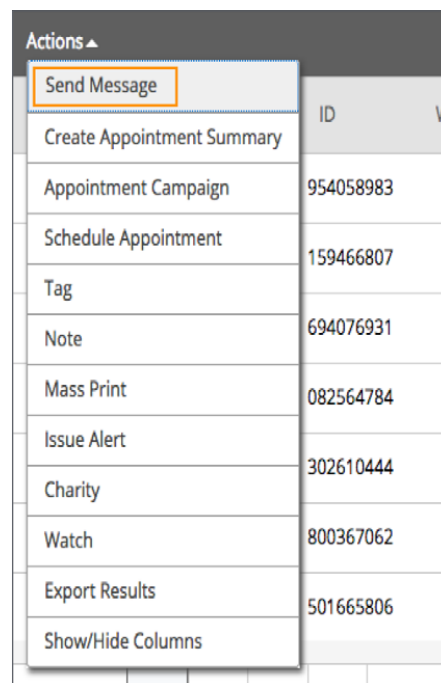
Send a message from the Staff home page	Send a message from the Student home page	Send a message from the Advanced Search

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 E: Creating an Appointment Campaign

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)
- **Services** – 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".

Review Students In Campaign

	NAME
☐	Ellert, Channah
☐	Malis, Philbert
☐	Plaas, Claire
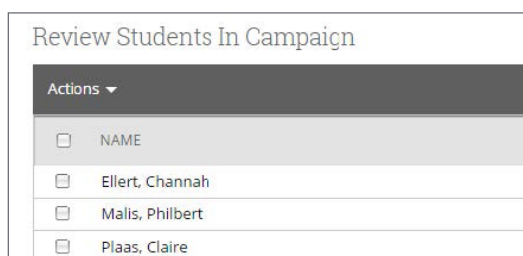
Adding Staff

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 and Send

Review the details of your campaign. When you are ready, click send to issue the email to students on the list.

Need Help? Access EAB's Help Center

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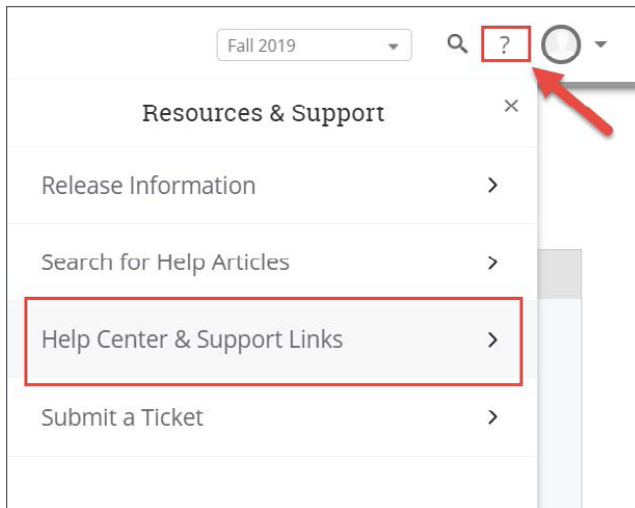
Accessing the Help Center

1 Log in to Navigate

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

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

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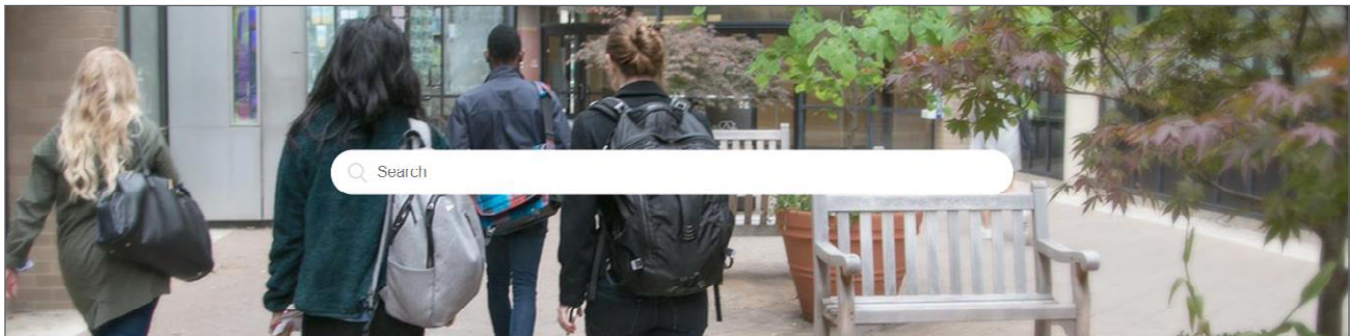
Platform Information

Feature Index

Learn about Navigate's features across all three pillars - Strategic Care, Smart Guidance, and Intelligence.

Actions and Workflows

Explore common workflows in the platform and learn more about the features to support your goals.

Additional Questions? Email HardrockerSuccess@sdsmt.edu