



## Quick Start Guide for Navigate

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University of Maine 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 university credentials!

<https://umaine.campus-training3.eab.com> - Training site

<https://umaine.campus.eab.com> - \*\*Live site\*\*

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 Google 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 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 Staff home or search results, or from a student's profile.
  - **Reminder!** For scheduled appointments, add summary reports from the "Upcoming Appointments" tab of the staff 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.
- **Create an Appointment Campaign** - Use this to invite students set up an advising appointment during times you have designated –
  - From the 'Actions' menu on your list, select 'Appointment Campaign' – See Appendix C 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 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	<a href="#">Edit</a>

#### ADD AVAILABILITY

Mon Tue Wed Thu Fri Sat Sun

From: 8:00am To: 5:00pm  
All times listed are in Eastern Time (US & Canada).

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  
B I [List Icons] [Undo/Redo]

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 what type of appointments you will have. It is recommended that you select both appointments and campaigns for your availability.

**Step 4:** Choose the Care Unit and location where you will be available. **Faculty advisors will choose Academic Advising and "My Faculty Advisor's Office."**

**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.

It is recommended that you select all service options you would meet with students for.

**Step 6: Optional:** Add a URL or phone number. Using this field will add a clickable link for students in the confirmation email and reminder email.

*Continued on next page.*

# Appendix A: Setting Up Your Availability

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**Step 7:** Use the Special Instructions box to include personalized information, such as your office room number and location. If you chose "My Faculty Advisor's Office," you need to supply your office location here.

**Step 7:** Click the Save button.

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

Special Instructions for Student

**Tip –**

You are now able to create availability for group appointments by indicating how many students are able to schedule into the same appointment. If you only meet one-on-one meetings, please leave this as 1.

### Will you be meeting with multiple students?

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

Max Number of Students per Appointment

**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.

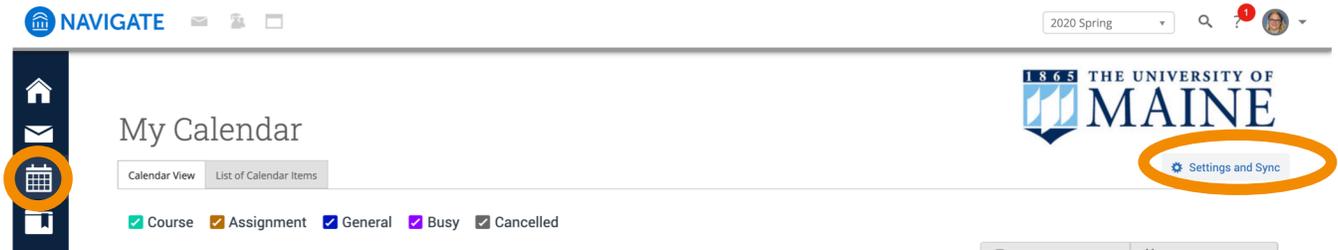
**Delete Time**- to delete your time, simply select the time and click the Delete Time button.

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

# Appendix B: Sync Your Google 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 calendar.



**Step 1:** Access your calendar by clicking the calendar icon on the left panel. Once there, click on the "Settings and Sync" button directly below the UMaine logo on the right.

**Step 2:** On the next page, click "Setup Sync."

**Step 3:** Choose the calendar application you would like to sync with. Google will be the default option as the System uses Google accounts.



**Step 4:** Login using your Google account, accept the Terms And Conditions.

**Step 5:** Choose one calendar for Two-Way Sync and as many calendars as you would like for Free/Busy Sync.

**Two-Way Sync:** This must be a calendar that you own, not one which has been shared with you. Everything on this calendar will show as busy time in Navigate AND all of your Navigate appointments will show on this calendar.

**Free/Busy Sync:** Select any of your calendars and calendars shared with you which will impact your availability. All events on these calendars will appear as "busy" on your Navigate calendar.

Select Calendar for Two-Way Sync

UM-Kim Stewart

Select Calendar for Free/Busy Sync

NAVIGATE TRAINING CALENDAR, Navigate Table

Save

Back

**Step 6:** Click "Save."

**Note:** Students will not see your calendar or "busy" times. They will only see options of available times when scheduling appointments.

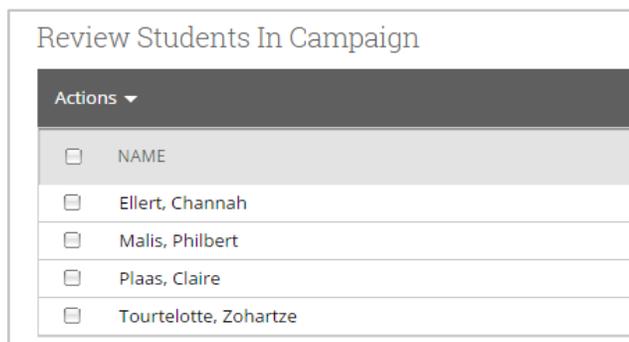
# Appendix C: Creating an Appointment Campaign

**Locating Campaigns:** While on the staff home screen, select "Campaigns" from the left hand side toolbar. This will take you to the Campaigns tab. From there, select Appointment Campaign from the right hand side, under Actions.

## Define Campaign:

- o Name your campaign (Students will not see the name of the campaign, but other faculty/staff will)  
Standard naming convention is: semester – reason – your initials  
Ex. F20 – PIN/Registration - KS
- o Select "Academic Advising" as the Care Unit (or the applicable Care Unit for your campaign)
- o 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).
- o 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". In that screen, you must have selected matching appointment reasons. For example, if in your advising campaign you say you will be available for "Registration", you must also have chosen "Registration" as a service you are available for in your campaign appointment availability.
- o 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". Ensure that you have created **CAMPAIGN** availability (as opposed to appointment or drop in availability) during the timeframe that you would like your campaign to run.
- o Appointment Limit- how many appointments can the student schedule for the campaign? (default is 1)
- o Appointment Length- how long do you want the appointment to last?
- o Select 1 slot per time (select more if you'd like more than 1 student to select the same time slot for group advising)
- o Allow scheduling over courses- this option will allowed students to schedule appointments over their AND your course times. If you would like students to be able to schedule over their courses, but not your teaching times, make sure to block off your teaching times in your Google calendar and sync your calendar with Navigate (see Appendix B).

**Adding Students:** Select the students you wish to include in your campaign from your list of assigned students or upload a CSV file of student ID numbers. Confirm the list of students included and remove or add students as needed.



# Appendix C: Creating an Appointment Campaign

**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.

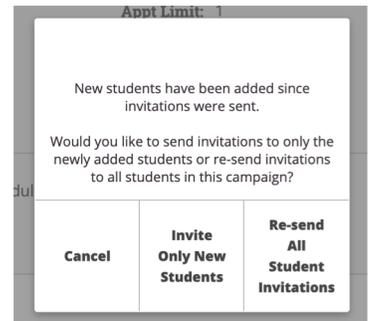
**Compose Your Message:**

- o Create a Subject Line for your email
- o 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.
- o In the instructions and notes box, add any details about the appointment that you would like to display on the scheduling landing page. For example, "This is a registration appointment to ensure you register for Fall 2020 classes. Please bring a list of courses you are interested in."
- o You may also upload a document, such as a blank Program Sheet.
- o As you edit these fields, the text in the box below will show how your edits will appear in the message.
- o Scroll down to the bottom of the screen. In the left tab, you will see a snapshot of what the email the student receives will look like.
- o In the right tab, you will see the scheduling landing page. This is where the student will be directed to choose a time for their appointment when they click the link in their email.

**Confirm & Send:** Review the details of your campaign.

- o On this page, there are checkboxes to send email and/or text reminders to the organizer (you) and the non organizer (the students).
  - o If you would not like to receive an appointment reminder the day before the appointments, uncheck the boxes for organizer. It is recommended that you do include a reminder for students.
- o When you are ready, click send to issue the email to students on the list.

**Note:** After you have sent a campaign, you may add additional students and resend the campaign to only those new students. To do this, add new students under "Review Students." when you click "Send," there will be a third option to send the campaign only to the new students.



**Follow Up:** After sending a campaign, you can view appointments created through the campaign by navigating back to the Campaigns tab and opening the campaign.

From this page, you can also send a reminder to the students who have not yet created an appointment by clicking the "Appointments Not Yet Made" tab, clicking "Actions," and choosing "Resend Appointment Request."

## Appointment Campaigns > S20 - First year - KS

02/10/2020 - 02/22/2020

Appointments Made	Appointments Not Yet Made	Reports Created	Eligible Appointments
<div style="border: 1px solid gray; padding: 5px;"> <b>Actions</b> <ul style="list-style-type: none"> <li>Resend Appointment Request</li> <li>Send a Message</li> <li>Add Note</li> <li>Add Tag</li> </ul> </div>			
EMAIL			
	hily		
	hily		