

Navigate Training Manual

Contents

How to Log-In	2
User Settings.....	4
How to Sync Your Calendar.....	7
Setting-up Availability.....	10
How to Schedule an Appointment with a Student	15
How to Run an Appointment Campaign.....	18
How to Issue an Alert	27
Case Management.....	35
How to Message Students	39
How to Add a Note on a Student	44
How to Record Class Attendance.....	46
Academic Planner.....	50
Advanced Search, Watch Lists, Saved Searches	60

How to Log-In

There are two methods of logging into Navigate:

Method #1

1. Open either a Google Chrome or Mozilla Firefox browser



2. Log-in to your [MyWashburn](#) account

3. Click on the **Faculty** tab from the left-hand menu

4. Select **Navigate Staff** from the **Faculty/Advisor Self Service** box on the right-hand side. This will take you into the Navigate platform.

The screenshot shows the Washburn University Faculty page. On the left, a dark blue navigation menu includes 'Home', 'News & Events', 'University Services', 'Student Academics', 'Student Life', 'Financial Services', 'Faculty' (highlighted with a red arrow), 'MyCourses', and 'Employee'. The main content area is titled 'Faculty' and contains three columns: 'Faculty Senate - University Governance', 'Advisor Dashboard' (with fields for Term, ID, Last Name, and First Name), and 'Faculty/Advisor Self-Service'. The 'Faculty/Advisor Self-Service' section includes links for 'Faculty Dashboard', 'Faculty Dashboard Quick Reference', 'Process a registration override', and 'View Tentative Final Exam Schedule'. Under 'General Student Information', the 'Navigate Staff' link is highlighted with a red arrow.

Method #2

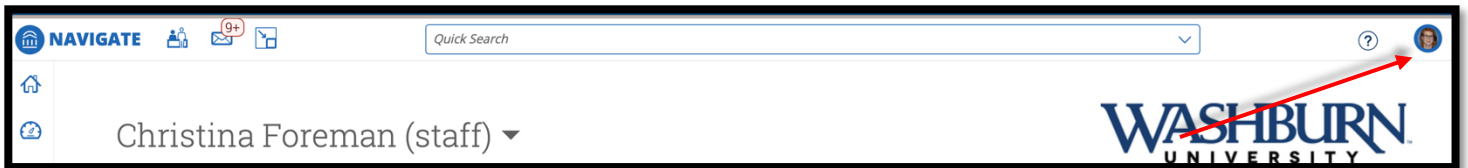
1. Open either a Google Chrome or Mozilla Firefox browser



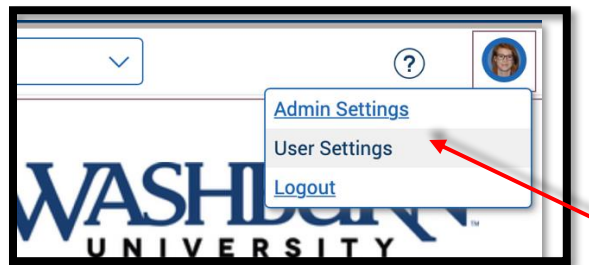
2. Type this direct web address to Navigate, in your browser – washburn.campus.eab.com – if you are already logged in to one of our Washburn single-sign-on systems, this will take you directly into the Navigate platform, if not, enter your Washburn credentials.

User Settings

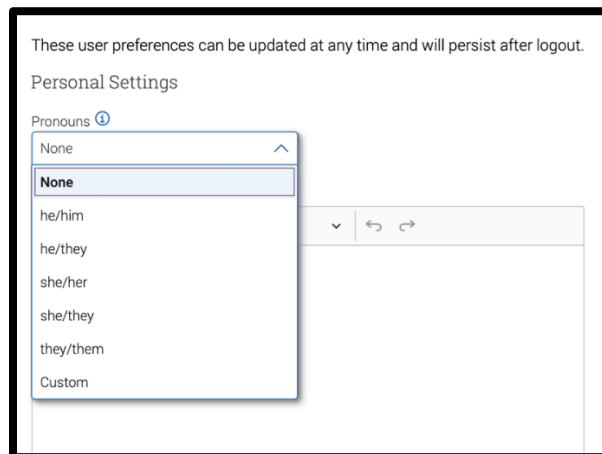
1. Once you have logged in to Navigate, click on your profile picture or initials, in the upper-righthand corner to reveal a drop-down menu.



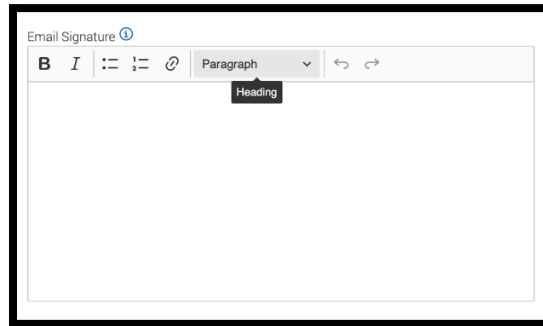
2. Click on **User Settings** to take you to the settings window.



3. Once in the user settings window, there will be several fields that allow you to change your settings. The first is **pronouns**. You are welcome to add **Pronouns**, which will appear after your name on all Navigate communication, or leave this field blank.



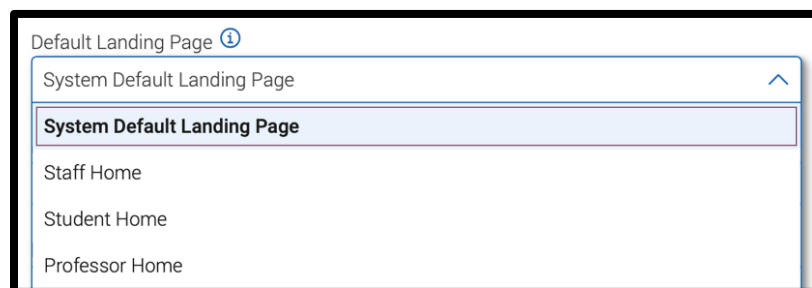
4. In the **Email Signature**, section you can customize a signature to attach to any Navigate communication. You can also copy & paste in your current email signature.



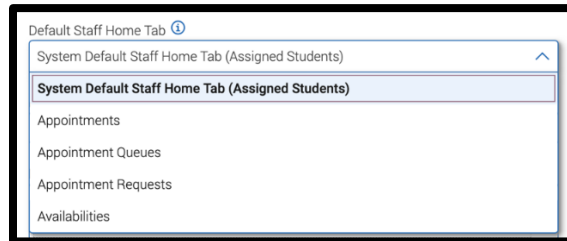
5. The **Default Term** will change the default term your Navigate populates to. This will ensure that you do not need to update your semester from the Law term each time. This setting will need to be updated each semester.



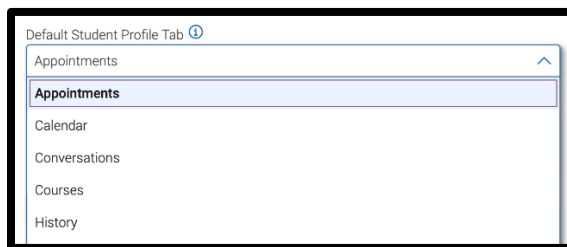
6. The **Default Landing Page** changes the home page of the Navigate platform. Choose a **Default Landing Page** to specify which page you prefer to land on after logging in, the most common landing pages are **Staff Home** or **Professor Home**.



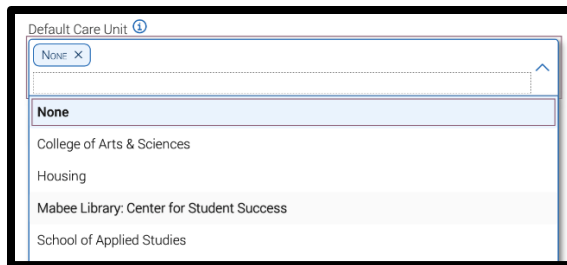
- Choose a **Default Staff Home Tab** to specify which tab you prefer to land on when accessing your home page.



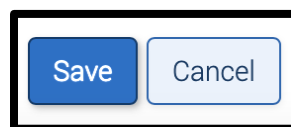
- Use the **Default Student Profile Tab** to choose the section you would like to see first when viewing a student's profile.



- Choose a **Default Care Unit** to specify which Care Unit you are associated with (Care Units refer to your academic college/school or other campus unit).



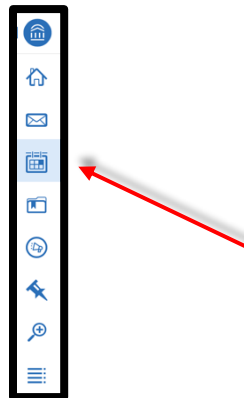
- Make sure to save your changes before exiting the user settings window.



How to Sync Your Calendar

Syncing your Navigate calendar to your electronic calendar will give you the capability to schedule appointments with students.

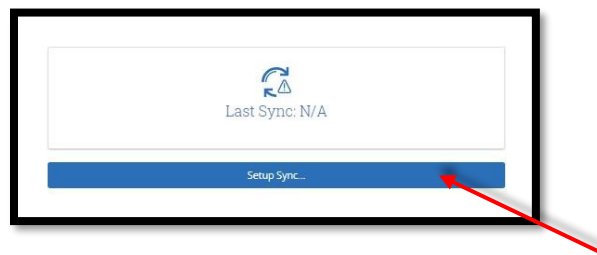
1. Once you have logged in to Navigate, click on the **Calendar** icon on the left-hand, vertical bar



2. Click on the **Settings and Sync** button located below the Washburn University logo



3. Next, click the **Setup Sync** button



- Select your calendar preference from the provided options

Please Choose Your Calendar Application:

Microsoft Office 365 (Latest Version)

Google Calendar

Other Applications

Go back...

- Once you have selected your preferred calendar, you may be prompted to log-in to the email account associated with that calendar, please do this as it will complete to sync process.

Microsoft

Sign in

Email or phone

Can't access your account?

Next

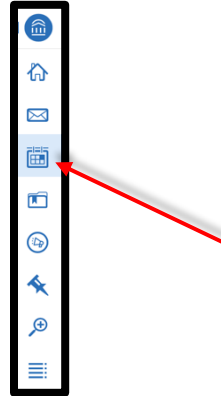
- You should now see a screen that looks like the below image. Depending on the amount of appointments on your calendar, it may take up to 30 minutes to fully sync. This process will complete on its own and you may leave the webpage if needed.

Outlook Service Accounts:
christina.foreman@washburn.edu

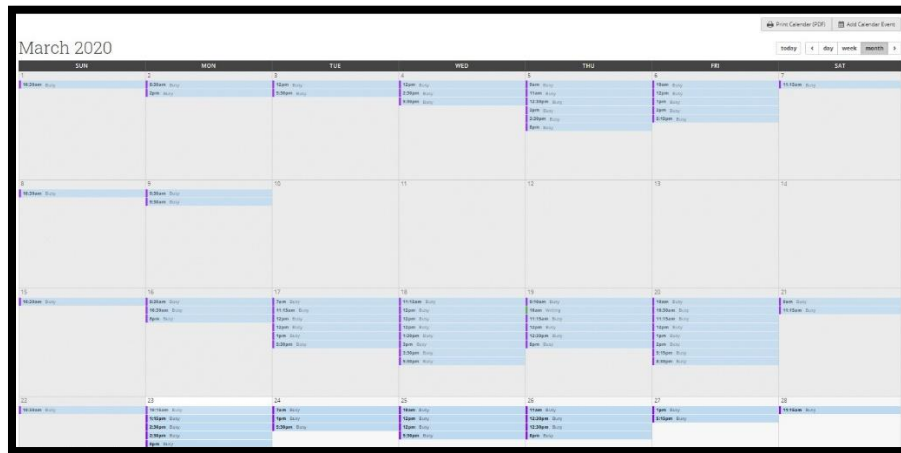
Retry Sync...

Disconnect Sync...

7. Click on your **Calendar** icon again,

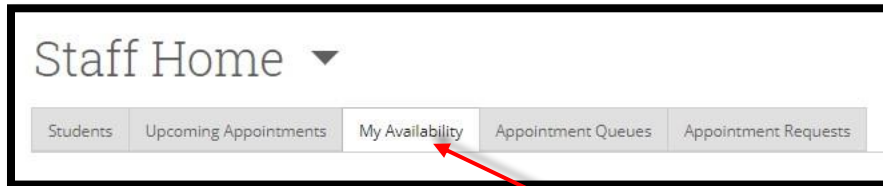


8. Make sure that the items from your calendar are transferring over as blocks of **Busy** time, indicating that your sync was successful

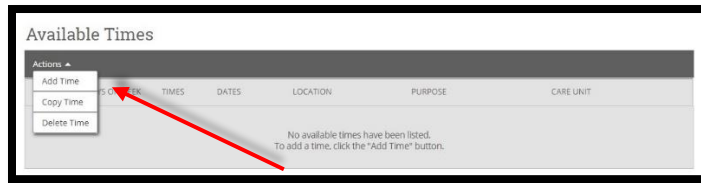


Setting-up Availability

- Once you have logged in to Navigate, and have synced your electronic calendar with the Navigate calendar, select the **My Availability** tab from beneath your **Staff Home**



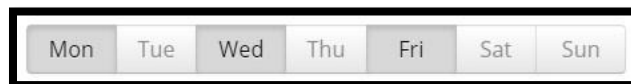
- Now click the **Actions** button from the dark gray bar, and select the **Add Time** option



- Fill out the form that appears on your screen

A screenshot of the 'ADD AVAILABILITY' form. The form asks 'When are you available to meet?' and includes a calendar view for the week of Monday to Sunday. Below the calendar, there are input fields for 'From' (8:00am) and 'To' (5:00pm), a note that 'All times listed are in Central Time (US & Canada)', a dropdown for 'How long is this availability active?', a checkbox for 'Add to your personal availability link?', and buttons for 'Appointments', 'Drop-ins', and 'Campaigns'. There are also dropdown menus for 'Meeting Type', 'Care Unit', and 'Location'. At the bottom, there are 'Cancel' and 'Save' buttons.

- Select the days of the week you are available to meet with students



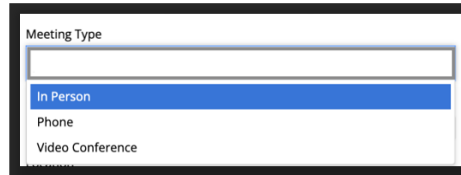
- b. Adjust the start and end times to reflect how early or late you are willing to meet with a student (If you have multiple times of availability ex. 8:00am-11:30am MWF and 12:30pm-5:00pm TR – finish setting up this availability for one time frame, then repeat the steps for the second time frame. If you choose to set up your availability for a longer period of time ex. 8:00am-5:00pm MTWRF, as long as you have synced the Navigate calendar with your electronic calendar, students WILL NOT be able to schedule over appointments already placed on your electronic calendar.)

- c. Under the **How long is this availability active?** section, it is our recommendation that you select **Forever** as it is the easiest to edit when needed

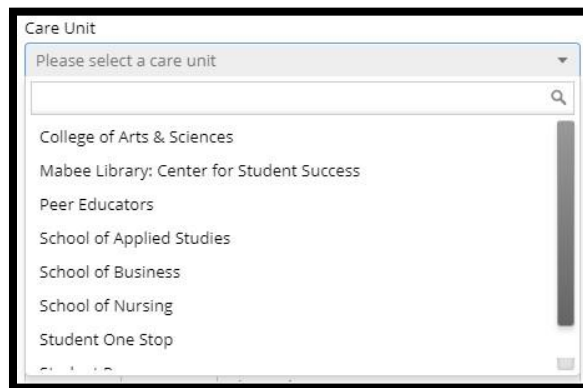
- d. On **Add to your personal availability link** click the provided checkbox to create a direct link to your availability. This link can be included in emails, email signatures, etc.

- e. Next, select your type of availability

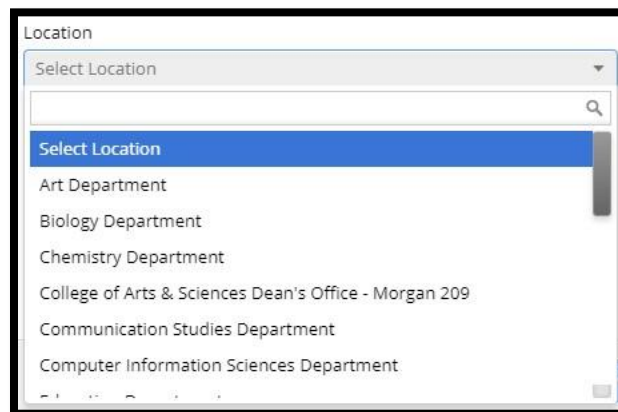
- f. Select the type(s) of meetings you will conduct from the **Meeting Type** box (To select multiple meeting types, click back into the box to select the next type.)



- g. The **Care Unit** reflects your academic college/school or campus units. Select the option that best suits you



- h. Your **Location** refers to your department



- i. Under **Services**, select the reasons you are available to meet with students (To select multiple services, click back into the box to select the next service.)

- j. Insert your office phone number or Zoom link here

- k. In the **Special Instructions for Student** box, tell the student where your office is located and any additional information you want them to know.

- l. Lastly, unless you would like to meet with multiple students at a time, make sure that the **Max Number of Students per Appointment** is set to **1**

4. Your availability is now set up, and your students can schedule appointments with you

Available Times						
Actions ▾						
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT
<input type="radio"/>	Mon, Wed, Fri	9:45a-4:15p	Forever	Biology Department	Academic or Career Advising, Class Support For: Appointments/Drop-Ins/Campaigns	College of Arts & Sciences Edit

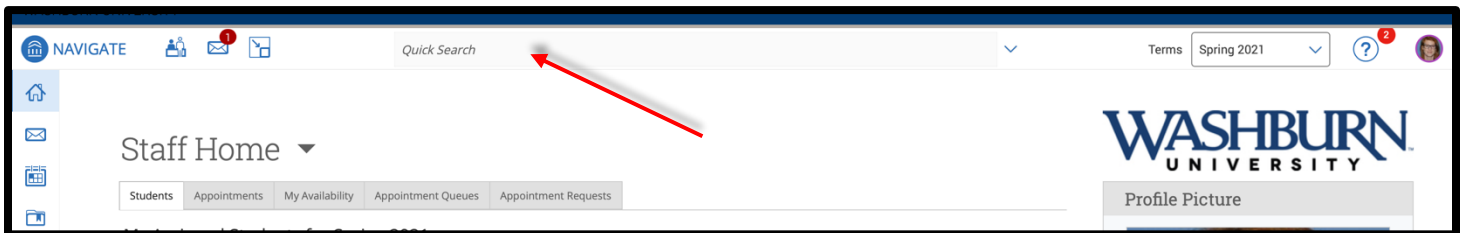
5. To access your **Personal Availability Link**, click the **Copy** button located next to the link

Personal Availability Link

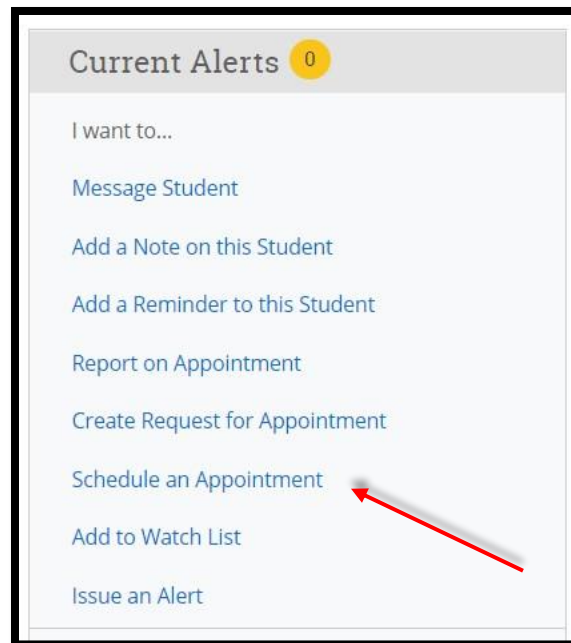
Link: <https://washburn.campus.eab.com/pal/OjUjfUFpLd> [Copy](#)

How to Schedule an Appointment with a Student

1. Once you have logged in to Navigate, make sure your Navigate calendar has been synced with your electronic calendar.
2. Make sure your Navigate availability has been set up for appointments.
3. Use the **Quick Search** feature in the upper center to find the student you need to schedule an appointment with.



4. On the student's profile page, in the **Current Alerts** box, click on **Schedule an Appointment**.



- On the left-hand side, fill out your **Care Unit**, **Location**, and **Service** to correspond with your created availability.

Care Unit

Location

Service

- Now, select your name from the list of **Organizers**.

Select An Organizer

SELECT	ORGANIZER	AVAILABLE TIMES
<input checked="" type="radio"/>	Foreman, Christina	For: Appointments Mon-Fri 8:00am-5:00pm CDT

- Adjust your desired **Length** of appointment.

Length:

- Select a **Date** from the calendar for your appointment.

Select a Date

May 2020

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

9. Select a green check box for your desired meeting time.

TIME SLOT	05/17 (SUN)	05/18 (MON)	05/19 (TUE)	05/20 (WED)	05/21 (THU)	05/22 (FRI)	05/23 (SAT)
6:00am - 7:00am CDT							
7:00am - 8:00am CDT		BUSY					
8:00am - 9:00am CDT			BUSY		<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	
9:00am - 10:00am CDT			BUSY	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	
10:00am - 11:00am CDT	BUSY	BUSY	BUSY	<input type="checkbox"/> 0/1 BUSY	<input checked="" type="checkbox"/> 0/1	<input type="checkbox"/> 0/1 BUSY	
11:00am - 12:00pm CDT	BUSY		BUSY	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1 BUSY	BUSY
12:00pm - 1:00pm CDT				<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1	BUSY
1:00pm - 2:00pm CDT			BUSY	<input type="checkbox"/> 0/1 BUSY	<input type="checkbox"/> 0/1	<input type="checkbox"/> 0/1 BUSY	BUSY

10. Add any additional **Comments** the student might need. If setting up a virtual meeting, this is a good place to insert a Zoom link.

Comments

11. Select your desired **Reminders**.

Reminders

Send E-mail Reminder to the organizer attendee?

Send E-mail Reminder to non organizer attendees?

Send a text reminder to the organizer attendee?

Send a text reminder to non organizer attendees?

12. Click the **Save Appointment** button.

Save Appointment

13. The student will receive an email with the appointment information, and the appointment will automatically populate onto your synced calendar.

How to Run an Appointment Campaign

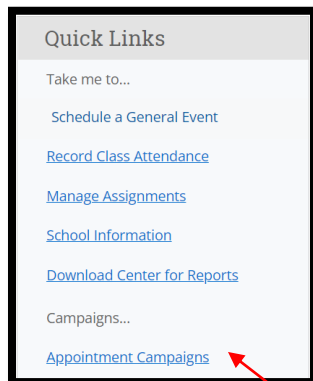
Appointment Campaigns allow you to invite a group of students to schedule an appointment with you for a specific reason. While there are many reasons you might conduct an Appointment Campaign, most faculty and staff use this feature for advising.

1. Once you have logged-in to Navigate, make sure that your Navigate Calendar is synced to your electronic calendar and make sure that your appointment availability is set up for **Campaigns**.

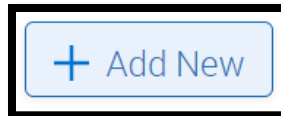


Available Times						
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	9:00a-4:00p	Forever	Biology Department	Academic or Career Advising For: Campaigns	College of Arts & Sciences

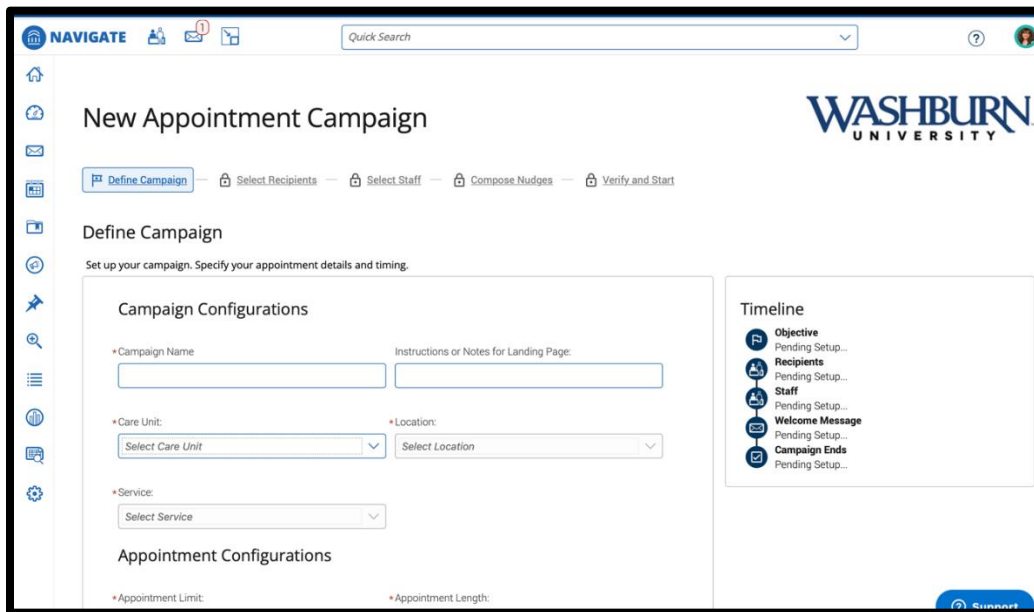
2. Click on the **Appointment Campaigns** link, in the **Quick Links** box



3. Now, click on the **Add New** button



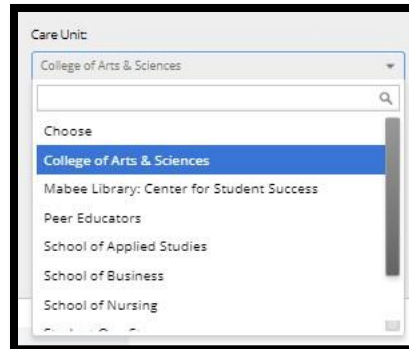
4. A form will appear on your screen, fill out each box as instructed



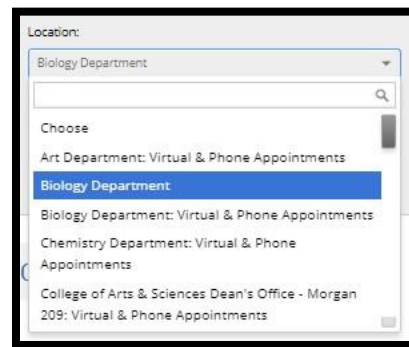
- a. Your **Campaign Name** should be created using this naming convention: Last Name, First Initial_Your Campaign Name_Term Code (Term Codes contain the current year, followed by **10** for spring terms, **20** for summer terms, and **30** for fall terms) ex. Foreman, C_Fall Advising_202010



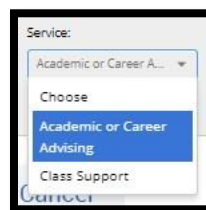
b. Your **Care Unit** refers to your academic college/school or other campus unit



c. Your **Location** refers to your department



d. Your **Service** should be your purpose for the **Appointment Campaign**



- e. Your **Appointment Limit** refers to how many times the student can schedule an appointment with during this campaign

*Appointment Limit:

X 1 X [] V

- f. Set your **Appointment Length** to the amount of time you would like scheduled for each appointment

*Appointment Length:

X 30 MIN X [] V

- g. **Slots Per Time** should be set to **1**, unless you would like to have multiple students schedule for the same time slot

*Slots Per Time:

X 1 X [] V

- h. If you are using this campaign for class check-in appointments that take place during class time, click the **Allow Scheduling Over Courses** checkbox, otherwise, please leave it unchecked

Allow Scheduling Over Courses

- i. Select your desired reminders

Staff Reminders: Recipient Reminders:

Email Text Email Text

- j. Adjust your **Start Date** and **End Date** to reflect how long you would like your campaign to be active (two weeks is the recommended time frame)

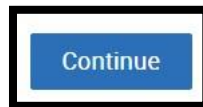
Scheduling Window

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

*Start Date *End Date

January 11, 2023 January 25, 2023

- k. Click the continue button on the lower right-hand side of the form



- l. The next screen will ask you to **Add Recipients To Campaign**
 - i. Use the various search criteria provided to find your desired group of students (make sure to have the current semester selected from the **Enrollment History** section), then click **Search**

New Search

Saved Searches -

Keywords (First Name, Last Name, E-mail, Student ID)?

Student Information First Name, Last Name, Student ID, Category, Tag, Student List

Enrollment History Enrollment Terms ↖

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

Term Data Classification, Section Tag, Term GPA

Performance Data GPA, Hours, Credits

Course Data Course, Section, Status

Assigned To

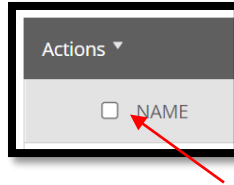
Academic Plan Planned Terms, Plan Warnings?

Polls Questions, Choices?

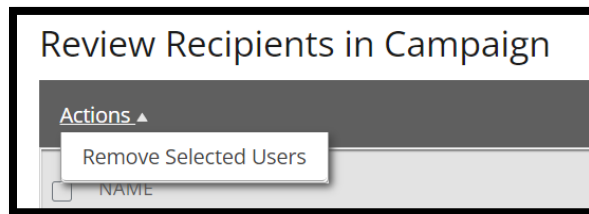
Success Indicators Success Markers

Search Include Inactive My Students Only

- m. Select the **Check All** box at the top of the list to add all search results to your campaign



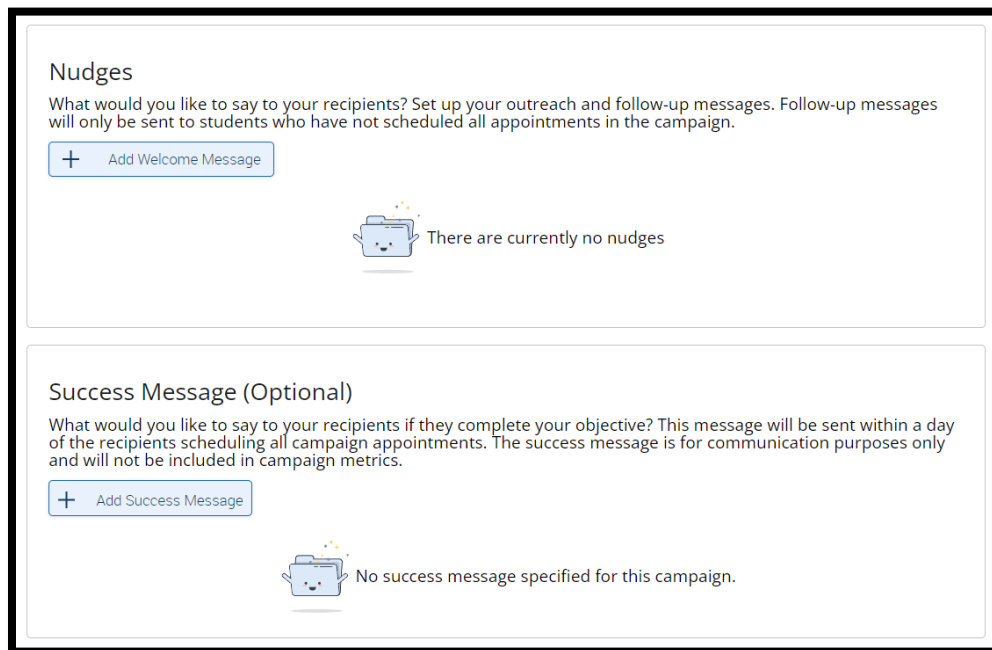
- n. **Review Recipients in Campaign**, if you have certain students you do not need to meet with, click the check box next to their name, then click the **Actions** button in the dark gray bar, and select **Remove Selected Users**, then click **Continue**



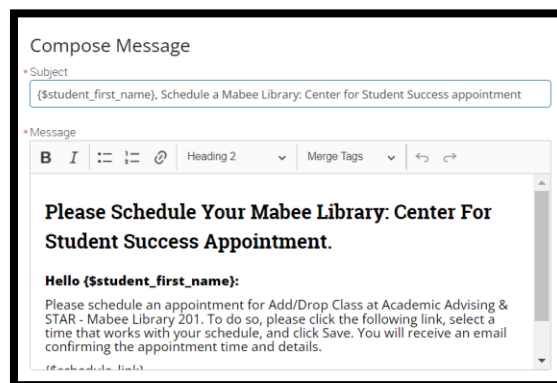
- o. On the **Select Staff For Campaign** screen, select the check box next your name, and click **Continue**



- p. The next screen prompts you to **Compose Nudges**, **Nudges** are the emails that are sent to your student with the campaign link. You may compose more than one nudge to be sent as a reminder. All nudges have a customizable send date. In addition, a **Success Message** may be sent to a student confirming that they have scheduled their appointment. Click the **Add Welcome Message** or **Add Success Message** (depending on which one you are working on)



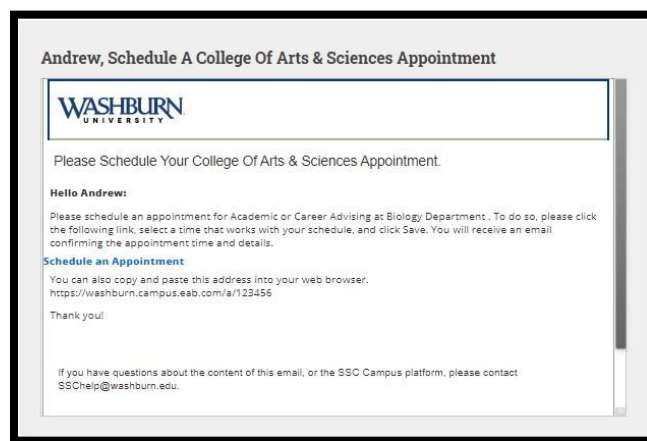
- q. All text is customizable, but do not delete any text found in {brackets}, as these will auto-populate the student’s first name as well as the link to schedule the appointment



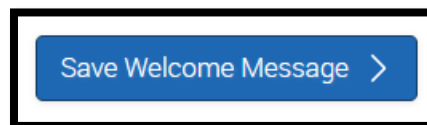
- r. Select your desired **Send Date**

A screenshot of a dropdown menu for selecting a send date. The text '* Send Date' is followed by an information icon. The selected date is 'January 11, 2023' and there is a downward arrow on the right side of the dropdown box.

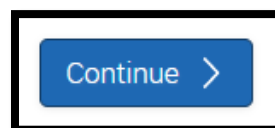
- s. A preview of your Nudge can be found on the right-hand side of the screen



- t. Click **Save Welcome Message** or **Save Success Message** (depending on which one you are working on)



- u. When you have finished composing your desired nudges, click **Continue**



v. On the final screen, review the details of your campaign, and click **Start Campaign**

Verify & Start

Campaign Summary

Define Campaign	Name:	Foreman, C_Advising_202310
	Care Unit:	Mabee Library: Center for Student Success
	Location:	Academic Advising & STAR - Mabee Library 201
	Service:	Add/Drop Class
	Appointment Limit:	1
	Appointment Length:	30 mins
	Slots Per Time:	1
	Scheduling Window:	01/11/2023 - 01/25/2023
	Allow Scheduling Over Courses:	No
	Staff Reminders:	Email - No Text - No
	Recipient Reminders:	Email - Yes Text - Yes

Recipients [View 3 recipients](#)

Staff [View 1 staff](#)

Welcome Message	Send Date:	Wed 01/11/2023
	Subject:	{Student_first_name}, Schedule a Mabee Library: Center for Student Success appointment
	Email Preview:	View Email

Success Message	Subject:	Thank You For Scheduling Your Appointment
	Success Message Preview:	View Email

[Back](#) [Save and Exit](#) [Start Campaign](#)

When a student has scheduled an appointment, you will receive an email notification, and the appointment will auto-populate onto your electronic calendar as long as you have gone through the process of syncing your calendar.

How to Issue an Alert

There are three methods to issue an alert, on a student, within Navigate.

1. Once you have logged in to Navigate,

Method #1:

1. Click the **Issue An Alert** button underneath the Washburn logo



2. An alert form will pull up on your screen. Using the provided search bar, look up your student

The image shows a screenshot of the 'ISSUE AN ALERT' form. At the top, there is a search bar labeled 'Student'. Below that, there are two radio buttons for 'Please select the reason you believe this student needs assistance': 'Academic Concerns' and 'Attendance Concerns'. There is also a dropdown menu for 'Is this alert associated with a specific class?' with 'Optional' selected. Below that is a text area for 'Additional Comments' containing the text: 'John has missed several classes in a row now, and has missed the last three assignments. I have reached out at least three times, via email, to this student with no response.' At the bottom right, there are 'Cancel' and 'Submit' buttons.

3. Select your alert reason from the next box (if multiple reasons apply, simply click back into the box to select the next reason).

Concerns	Kudos	Referrals	WUTECH
Attendance Concerns Attendance Concerns – Excessive Absences Behavioral Concerns Campus Involvement Concerns Coursework Concerns Coursework Concerns – Danger of Failing Health Concerns Residential Living Concerns Technology Concerns	Kudos – General Kudos – Consistently Outstanding Work Kudos – Remarkable Improvement	Accommodations Referral Basic Needs Referral Financial Aid Referral Math Tutoring Referral Success Coaching Referral Tutoring Referral	WUTECH – Academic Concerns WUTECH – Attendance Concerns WUTECH – Course Participation Concerns WUTECH – Student Kudos

4. In the next box, associate your alert with the correct class, if applicable. Please note that the courses that pre-populate here are the courses the student is enrolled in, not the courses you are teaching this term.

5. Finally, in the last box please state what actions have you already taken. These actions may include emails to the student, or conversations after class with the student regarding the issue and reason for your alert.

6. Submit the alert

ISSUE AN ALERT ✕

Student

Please select the reason you believe this student needs assistance

Is this alert associated with a specific class?

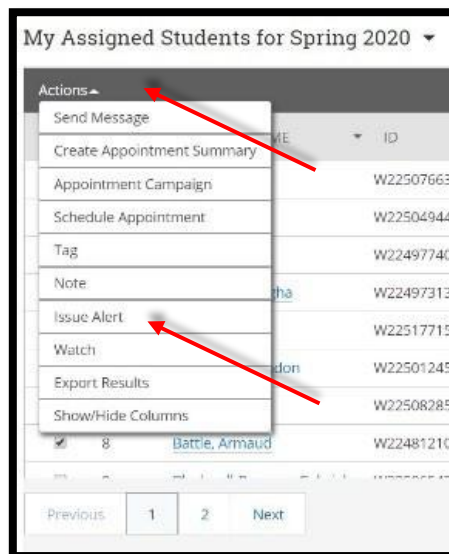
Additional Comments

Method #2:

1. Once logged in you will notice that your home screen will default to either a **Staff Home** or a **Professor Home**

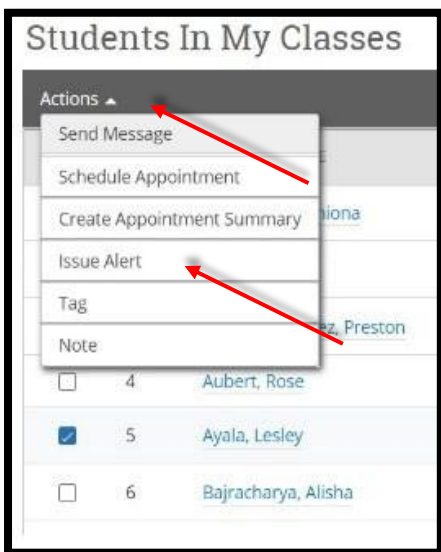


2. From your **Staff Home** you can issue an alert for one of your assigned advisees
3. Click the check box next to your advisee's Name
4. Next, select the actions button from the dark gray bar
5. Select the **Issue Alert** option

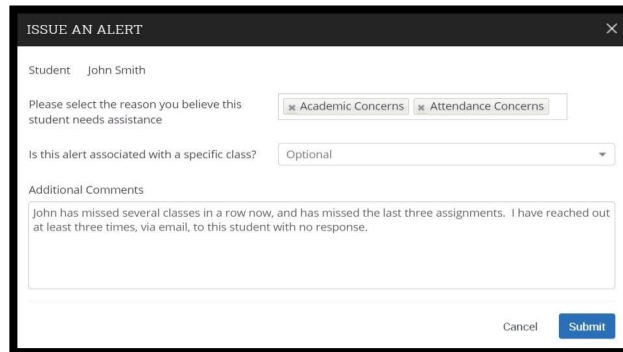


Professor Home ▾

2. If you are using a **Professor Home** you can alert for one of your assigned advisees issue an alert for any student enrolled in your classes
3. Click the check box next to your student's name
4. Next, select the actions button from the dark gray bar
5. Select the **Issue Alert** option



6. An alert form will pull up on your screen auto-populating your selected student’s name.



7. Select your alert reason from the next box (if multiple reasons apply, simply click back into the box to select the next reason.

Concerns	Kudos	Referrals	WUTECH
Attendance Concerns Attendance Concerns – Excessive Absences Behavioral Concerns Campus Involvement Concerns Coursework Concerns Coursework Concerns – Danger of Failing Health Concerns Residential Living Concerns Technology Concerns	Kudos – General Kudos – Consistently Outstanding Work Kudos – Remarkable Improvement	Accommodations Referral Basic Needs Referral Financial Aid Referral Math Tutoring Referral Success Coaching Referral Tutoring Referral	WUTECH – Academic Concerns WUTECH – Attendance Concerns WUTECH – Course Participation Concerns WUTECH – Student Kudos

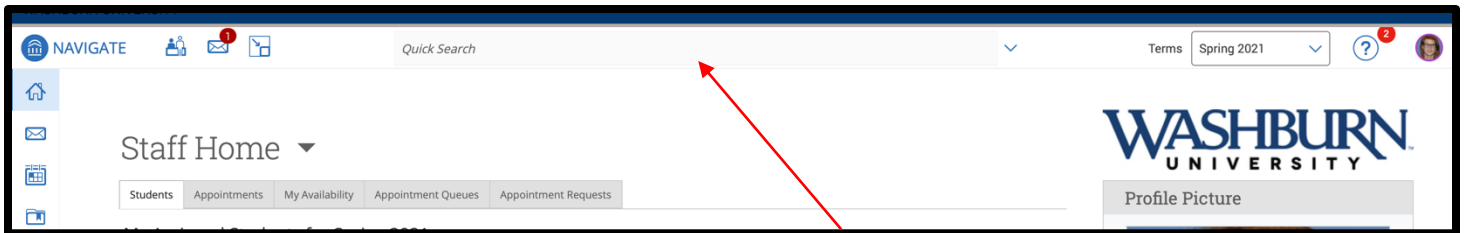
8. In the next box, associate your alert with the correct class, if applicable. Please note that the courses that pre-populate here are the courses the student is enrolled in, not the courses you are teaching this term.

9. Finally, in the last box please state what actions have you already taken. These actions may include emails to the student, or conversations after class with the student regarding the issue and reason for your alert.

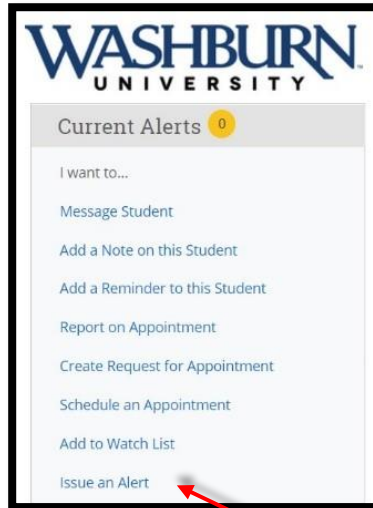
10. Submit the alert.

Method #3:

1. Select a student from your advisee list on your **Staff Home**, a student from your **Professor Home**, or use the **Quick Search** feature in the upper right-hand corner to search for the student you need to issue an alert on.



- Now that you are on the student's profile page, click the **Issue an Alert** button from the list provided in the **Current Alerts** box, below the Washburn logo



An alert form will pull up on your screen auto-populating your selected student's name.

3. Select your alert reason from the next box (if multiple reasons apply, simply click back into the box to select the next reason).

Concerns	Kudos	Referrals	WUTECH
Attendance Concerns Attendance Concerns – Excessive Absences Behavioral Concerns Campus Involvement Concerns Coursework Concerns Coursework Concerns – Danger of Failing Health Concerns Residential Living Concerns Technology Concerns	Kudos – General Kudos – Consistently Outstanding Work Kudos – Remarkable Improvement	Accommodations Referral Basic Needs Referral Financial Aid Referral Math Tutoring Referral Success Coaching Referral Tutoring Referral	WUTECH – Academic Concerns WUTECH – Attendance Concerns WUTECH – Course Participation Concerns WUTECH – Student Kudos

4. In the next box, associate your alert with the correct class, if applicable. Please note that the courses that populate here are the courses the student is enrolled in, not the courses you are teaching this term.

5. Finally, in the last box please state what actions have you already taken. These actions may include emails to the student, or conversations after class with the student regarding the issue and reason for your alert.

6. Submit the alert

ISSUE AN ALERT ✕

Student: John Smith

Please select the reason you believe this student needs assistance: x Academic Concerns x Attendance Concerns

Is this alert associated with a specific class? Optional

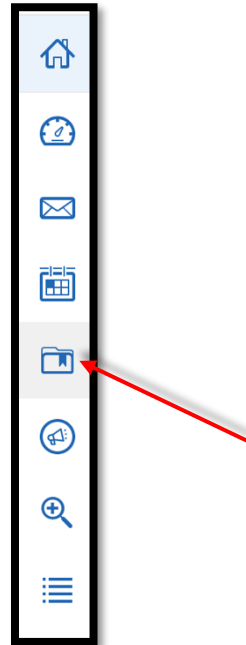
Additional Comments

John has missed several classes in a row now, and has missed the last three assignments. I have reached out at least three times, via email, to this student with no response.

Cancel Submit

Case Management

- Once you have logged in to Navigate, click on the **Cases** feature located on the left-hand menu bar.



- You will now see a full list of the **Cases** currently open and assigned to you.

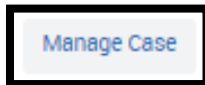
Cases WASHBURN UNIVERSITY

Status:

Care Unit: Student: Opened By: Assigned To: Alert Reasons: Date Opened: to Case Owner:

Actions										My Students Only
<input type="checkbox"/>	STUDENT	STATUS	CARE UNIT	REASON	DATE OPENED	OPENED BY	DATE UPDATED	UPDATED BY	ASSIGNED TO	CASE OWNER:
<input type="checkbox"/>	Lydia Stuart	Open	Mabee Library: Center for Student Success	Training Purposes Only	09/08/2022	Christina Foreman	01/12/2023	Christina Foreman	Christina Foreman	<input type="button" value="Manage Case"/>

- To add comments to a **Case**, select the **Manage Case** button found on the right-hand side, next to each individual case.



- A **Manage Case** form will now appear on your screen with any information or comments added by the **Case** issuer.

- Next, click the **Add Comment** button to add information to your assigned **Case**. (Please Note: information should be added as it relates to attempted contacts and methods, and any conversations had with the student regarding the issue comments. These conversations may be in-person, phone, video conference, or email. **Cases** may be updated multiple times.)

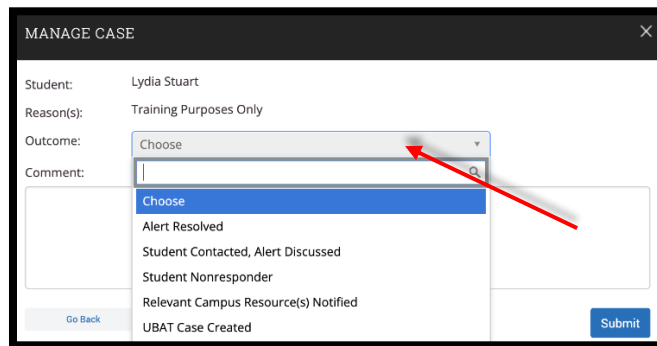
6. To close a **Case**, please select the **Close Case** button found on the bottom right corner of the **Manage Case** form.



7. Choose an **Outcome** for your assigned **Case**, this is the reason you are closing the **Case**.

Case Outcomes include:

- **Alert Resolved** – the issue is resolved with the student.
- **Student Contacted, Alert Discussed** – discussed and developed a plan to resolve the issue with the student.
- **Student Non-Responder** – tried to contact the student three times, through three methods (if available), over the course of two weeks.
- **Relevant Campus Resource(s) Notified** – referred student to another campus office/resource for additional support.
- **Follow-Up Not Necessary** – alert is already being handled by the issuer or other campus partner.



- Then, add a brief comment summarizing why you have closed this **Case**.

MANAGE CASE

Student: Lydia Stuart

Reason(s): Training Purposes Only

Outcome: Student Contacted, Alert Discussed

Comment: Student has developed a plan with their instructor to get caught up in their course.

Go Back Submit

- Finally, click the **Submit** button in the bottom right corner. (Please Note: all **Cases** not closed at the end of each academic term will be automatically closed with the **Outcome** reason of “Semester Ended – Unsure if Successful Contact Was Made.”)



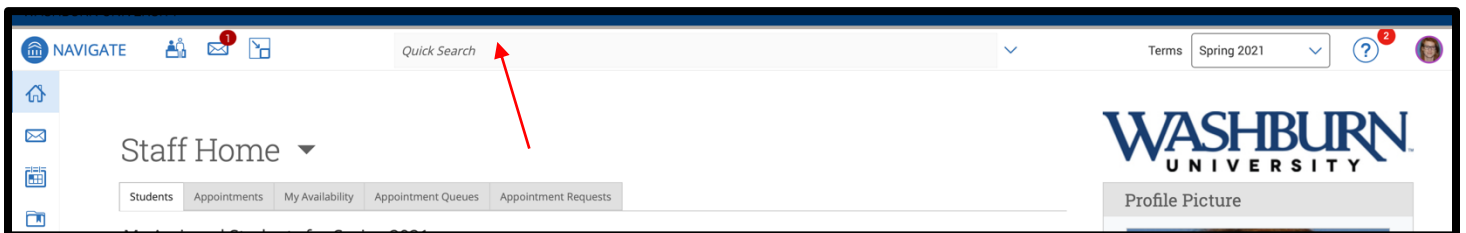
How to Message Students

Sending a message to your student(s) through Navigate will send an email from your Washburn email to the student's Washburn email. Navigate will also keep a record of all messages you send to the student.

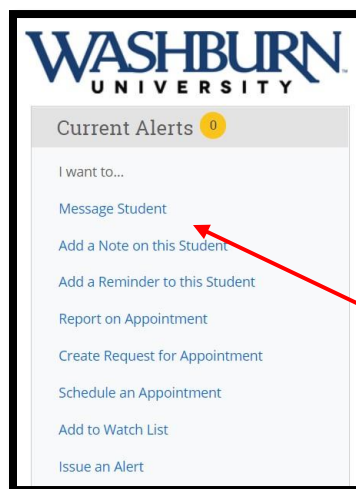
There are two different methods to send students messages through Navigate.

Method #1:

1. Once you have logged in to Navigate, click on the **Quick Search** feature in the upper center to look up your desired student



2. Now that you are on your student's profile page, select **Message Student** from the **Current Alerts** box located below the Washburn University logo



3. An email form will appear on your screen. Write your email and **Send Message**.

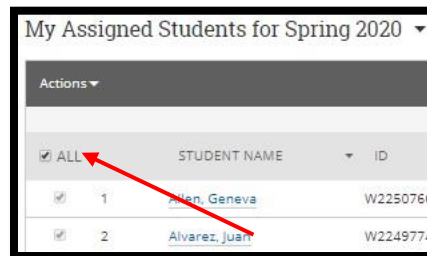
The screenshot shows a web-based email form titled "SEND A MESSAGE TO JOHN SMITH". At the top, there are two tabs: "Send E-mail" (selected) and "Send Text". Below the tabs, the "To:" field is populated with "John Smith". The "Subject:" field is empty. The "Message:" section contains a rich text editor with a toolbar featuring bold (B), italic (I), bulleted list, numbered list, link, paragraph style (set to "Paragraph"), and undo/redo icons. Below the message editor is an "Add Attachment:" section with a "Select file to attach" label and a file upload icon. At the bottom, there is a "Send Additional E-mail Notifications To:" field. At the very bottom right, there are two buttons: "Cancel" and "Send Message". A red arrow points to the "Send Message" button.

Method #2:

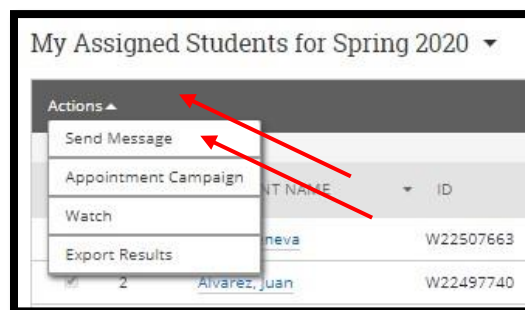
1. From your **Staff Home** you can message your assigned advisees, and from your **Professor Home** you can message the students enrolled in your courses



2. Click the check box next to the student(s) you would like to message (if you would like to message all of your assigned advisees, click the **ALL** box in the light gray bar)



3. Now, click the **Actions** button in the dark gray bar, and select **Send Message**

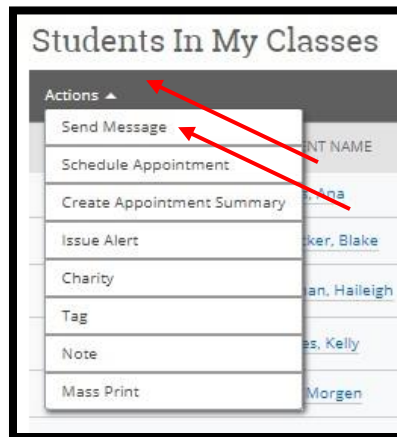


Professor Home ▾

- Click the check box next to the student(s) you would like to message (if you would like to message all of the students enrolled in your courses, click the **ALL** box in the light gray bar)



- Now, click the **Actions** button in the dark gray bar, and select Send **Message**

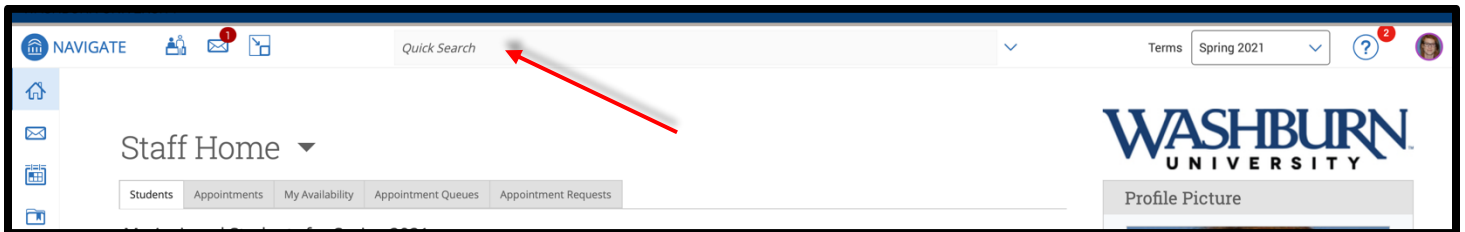


4. An email form will appear on your screen. Write your email and **Send Message**.

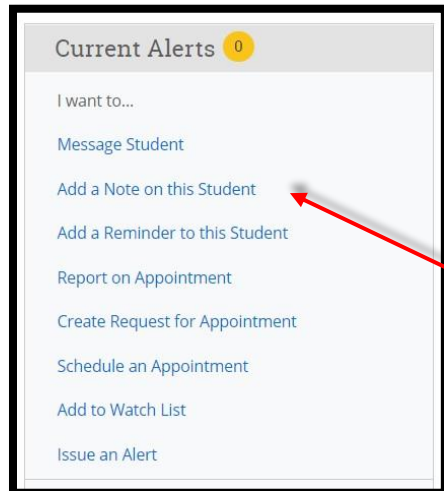
The record of the message you have sent to your student can be found on their profile page. Click on the **More** tab underneath their name, and select **Conversations**.

How to Add a Note on a Student

1. Once you have logged in to Navigate use the **Quick Search** feature in the upper center to find the correct student.



2. On the student's profile page, in the **Current Alerts** box, click on **Add a Note on this Student**.



- A note form will appear on your screen. Fill out the summary section with the appropriate information.

- Select the appropriate **Note Reason** from the provided list. If there is not an appropriate reason listed, leave the **Note Reason** box blank. Multiple **Note Reasons** may be selected.

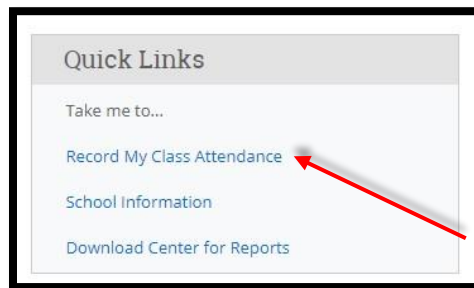
- All notes added on a student can be found on the student's **History** tab.

How to Record Class Attendance

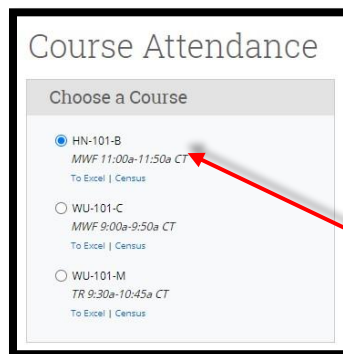
- Once you have logged in to Navigate, make sure your **Home** screen is set to your **Professor Home**, if it is not, click the menu button to select **Professor Home**.



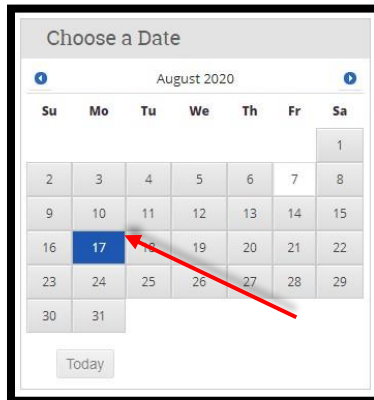
- Click the **Record My Class Attendance** link in the **Quick Links** box.



- From the **Choose a Course** box, select the course for which you need to record attendance.



4. Scroll down below the **Choose a Course** box until you see the **Choose a Date** calendar. Select the date for which you need to record class attendance.



5. Scroll up until you see your class roster appear, with the options to record **Present?**, **Absent?**, **Tardy?**, or **Excused?**.



- If you wish to only record those who are **Absent?**, you can click the check box at the bottom of the roster to **Mark Remaining Present**.

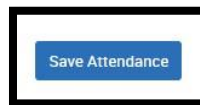
HN-101-B-C Honors First Year Experience : Monday, August 17, 2020

STUDENT	ABSENCES	PRESENT?	ABSENT?	TARDY?	EXCUSED?	PATTERN	report
Student 1	0/0	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report
Student 2	0/0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report
Student 3	0/0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report
Student 4	0/0	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report
Student 5	0/0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report
Student 6	0/0	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report
Student 7	0/0	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report
Student 8	0/0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report
Student 9	0/0	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>		Add Progress Report

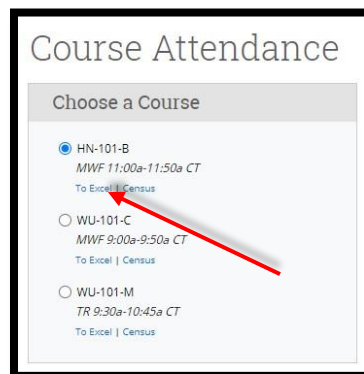
Mark Remaining Present

0 Present 5 Absent 0 Tardy

- Click the **Save Attendance** button before leaving this screen.



- If you would like to see your course attendance through an Excel spreadsheet, click the **To Excel** link located below your course, in the **Choose a Course** box.



9. Your Excel spreadsheet will include a **Legend** for each of the attendance markers.

HN-101-B-C Honors First Year Experience

Professors: Professor X
 Printed On: 2020-08-07T08:40:34.000

Total # of Enrollments: 14
 Total Drops: 1
 Total No-Shows: 0

Legend:

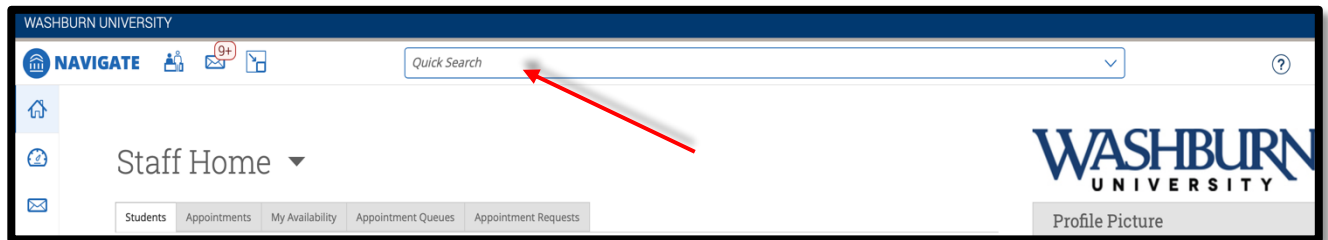
- Student Marked Present for Course
- # Absent - with the number being the absences occurrences
- (e) Excused
- x Last Day of Attendance
- Attendance with a Comment (click the handle to view)

Student	Enrollment Status	Total Absences	# of Excused Absences	8/17/2020	8/19/2020	8/21/2020	8/24/2020	8/26/2020	8/28/2020	8/31/2020	9/2/2020	9/4/2020	9/7/2020	9/9/2020	9/11/2020	9/14/2020
Student 1	Dropped	0	0													
Student 2		0	0													
Student 3		0	0													
Student 4		0	0													
Student 5		0	0													
Student 6		0	0													
Student 7		0	0													
Student 8		0	0													
Student 9		0	0													
Student 10		0	0													
Student 11		0	0													

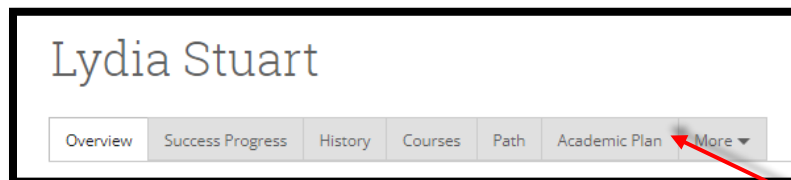
Academic Planner

Navigate’s Academic Planner will help faculty and students put together a comprehensive plan to graduation.

1. Once you have logged in to Navigate, use the **Quick Search** feature at the top to find the student you need to advise.



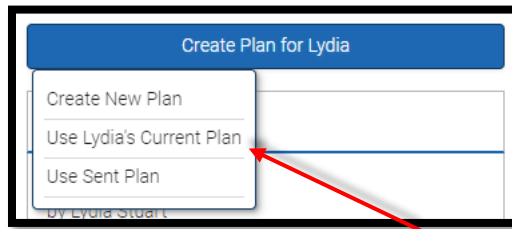
2. On the student’s profile, click on the **Academic Plan** tab underneath the student’s name.



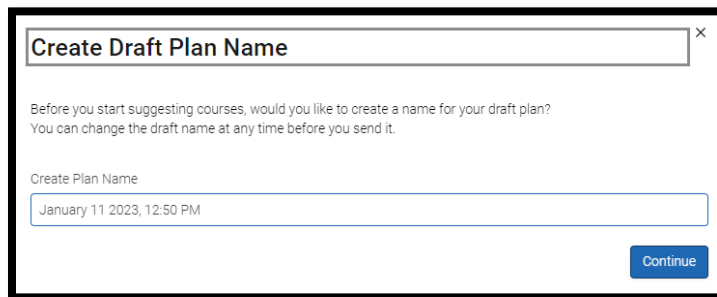
3. The **Planner** is laid out in three sections. The left-hand panel displays the **Planning Tools** and is where templates or preloaded courses can be selected. The center panel displays the **Student’s Current Plan** which shows prior semesters completed, courses currently enrolled in, and any future semesters that may be planned out. The right-hand panel is currently blank, but will display **Draft Plans** once you begin making edits.
4. To make edits or suggestions to the student’s academic plan, select the blue **Create Plan for Student** button found at the top of the left-hand panel.



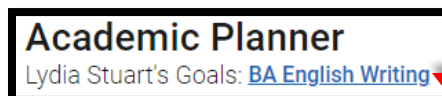
5. You have the option to **Create New Plan**, **Use Student’s Current Plan**, or **Use Sent Plan**. The **Create New Plan** option will create a plan without any changes the student may have already made. The **Use Student’s Current Plan** will leave any changes the student may have made in place. The **Use Sent Plan** will allow you to start with a plan you or another advisor previously sent to the student. We recommend you select **Use Student’s Current Plan** or **Use Sent Plan**.



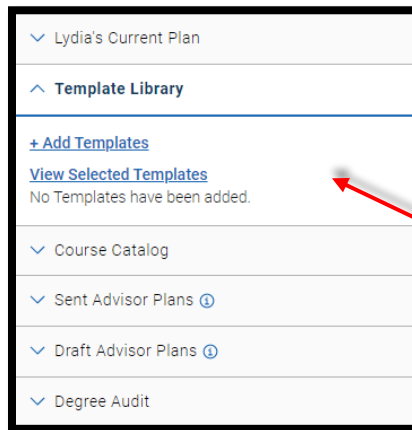
6. You will then be asked to **Create Draft Plan Name**. This auto-populates as a timestamp. You can keep this name or change it. We do recommend keeping a date in your naming convention.



7. On the left-hand side of the screen, under **the student’s name**, you will see the student’s program.

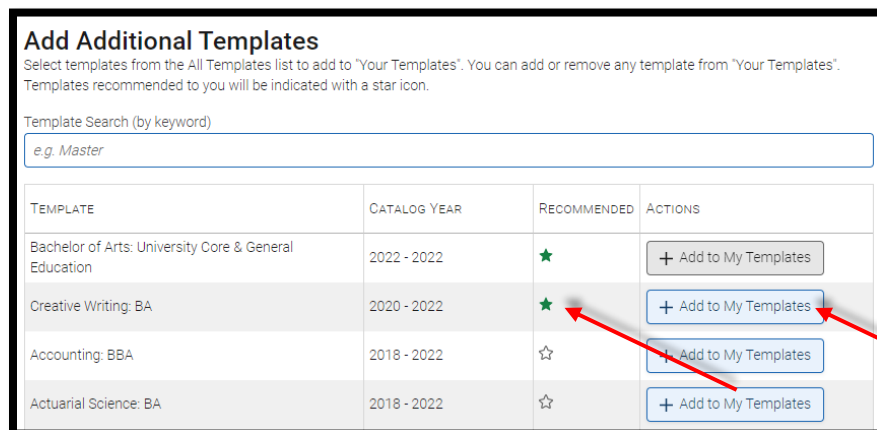


8. In the **Planning Tools** panel, under the **Template Library** there is a link to **+ Add Templates**. Click this to select the templates that correspond to the student’s academic program(s), or select **View Selected Templates** to see the template the student has already chosen.

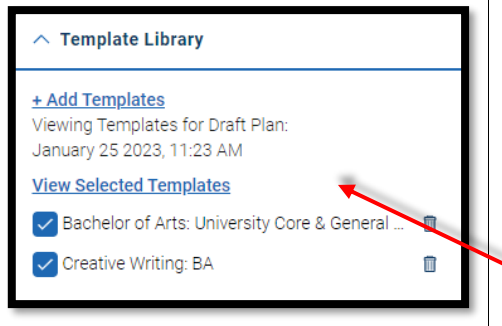


9. If your student is declared in a program they will have **Recommended** templates populate at the top of the list as indicated by a green star. If there are no recommended templates, the search bar will allow you to look up a template and add it by clicking the **+ Add to My Templates** button.

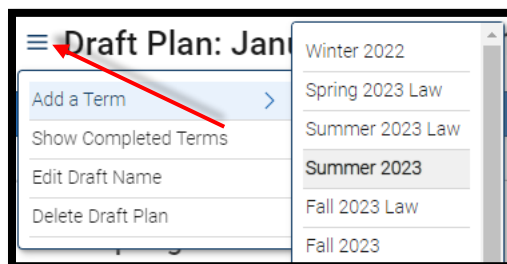
Students should have a minimum of two templates: one Degree template (ex. Bachelor of Arts: University Core & General Education) and one Program template (ex. Psychology: BA). Students may also have minor or certificate templates.



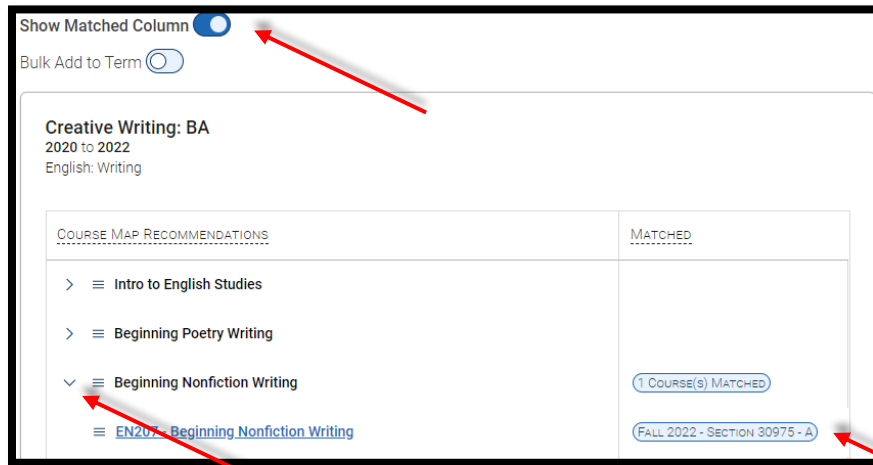
10. Once all templates have been added, select the **View Selected Templates** link from the **Template Library** to display the courses found on each template in the center panel.



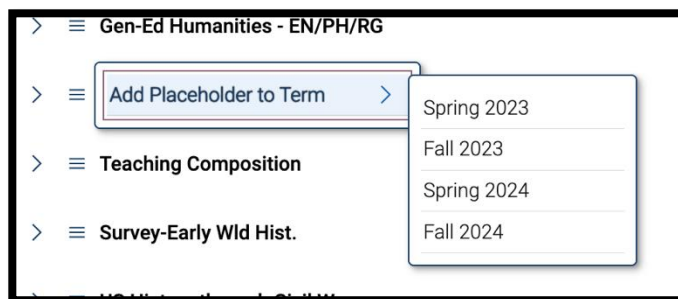
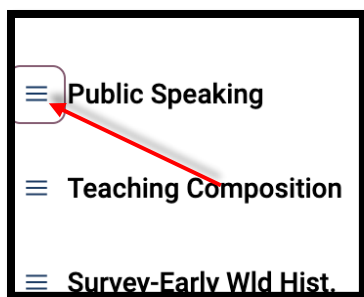
11. To begin planning out courses into future semesters click the menu button on the right panel and select **Add a Term**. Then choose your desired term.



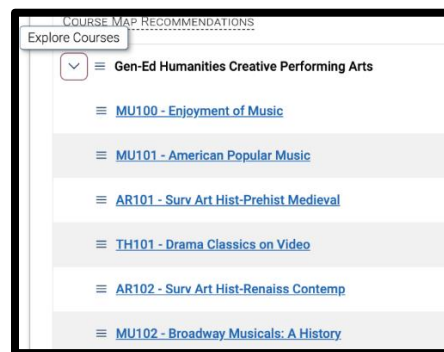
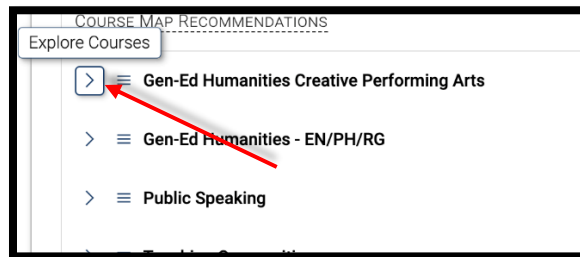
12. To view the courses that this student has already taken, is taking, or has already planned and how each relates to the selected templates, click the **Show Matched Column** toggle at the top of the center panel. Select the arrow next to a matched course to see the details of that match, including the grade the student received.



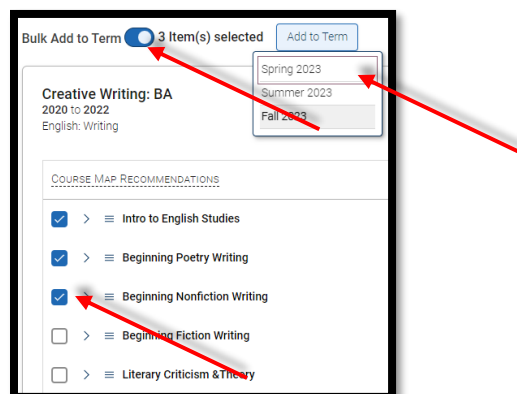
13. Now you can begin to add courses to the semester. Click on the course you wish to add from the center panel and select the term you want that course to be taken in.



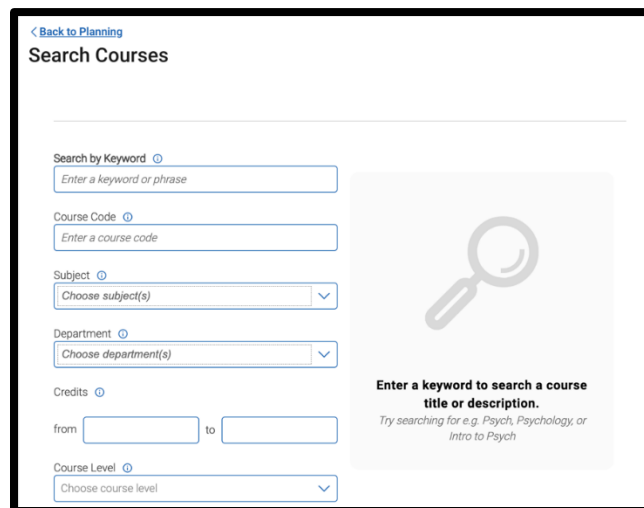
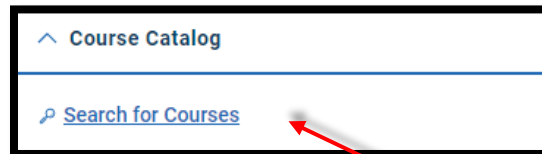
14. To plan out a specific course found in a grouping of courses (where the student has a range of options to choose from, Ex. **WU101 OR HN101**, or **Gen-Ed Humanities Creative Performing Arts**), click the side arrow next to the course group and select the desired course from the list of course options.



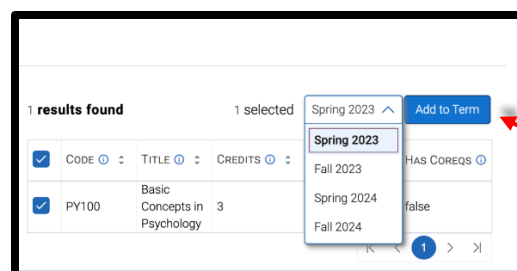
15. To add multiple courses at once to a single term, select the **Bulk Add to Term** toggle at the top of the center panel. Then click the checkboxes next to the courses you want, and select **Add to Term** and the appropriate semester.



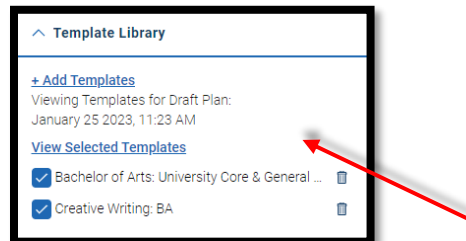
16. **Using the Search Feature:** If your desired course is not found among the pre-populated classes listed in the center panel, select the **Course Catalog** in the left-hand panel, then use the **Search for Courses** link to find your course (you may search by course code – **PY100**, course title – **Basic Concepts of Psychology**, or keyword/topic – **Psychology**).



17. To add the course from the search, select the checkbox next to the desired course. Then select the term you wish to add it to, then click **Add to Term**.



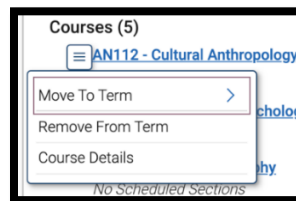
18. To return to the list of template courses select the **View Selected Templates** link from the **Template Library** on the left-hand panel.



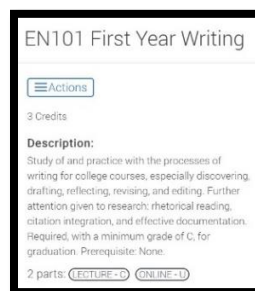
Additional Academic Planning features:

19. **Features for Planned Courses:**

Once a class is planned (on the right-hand panel) you can move, delete, or learn more about it. Click on the menu to the left of each course.



- Selecting **Move to Term** allows you to move that course to a different term
- Selecting **Remove from Term** will remove that course from the planned term
- Selecting **Course Details** will display the course description and any potential pre-requisites/co-requisites

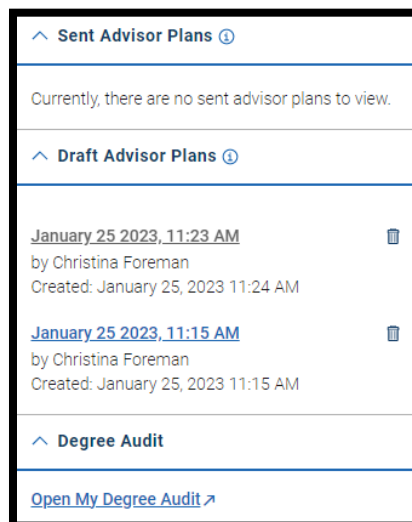


You can also add comments on each course. On the right-hand panel, next to each course is a comment box. Click this icon to **Add/Edit Comments** on that course. Add your comment, then click **Save**. Comments may also be added to an entire term.



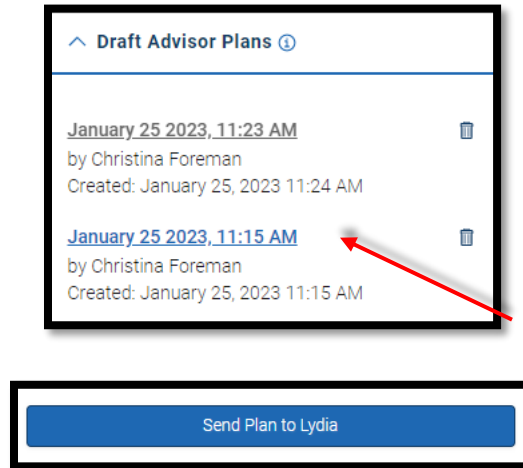
20. Features for Plans:

On the left-hand panel:

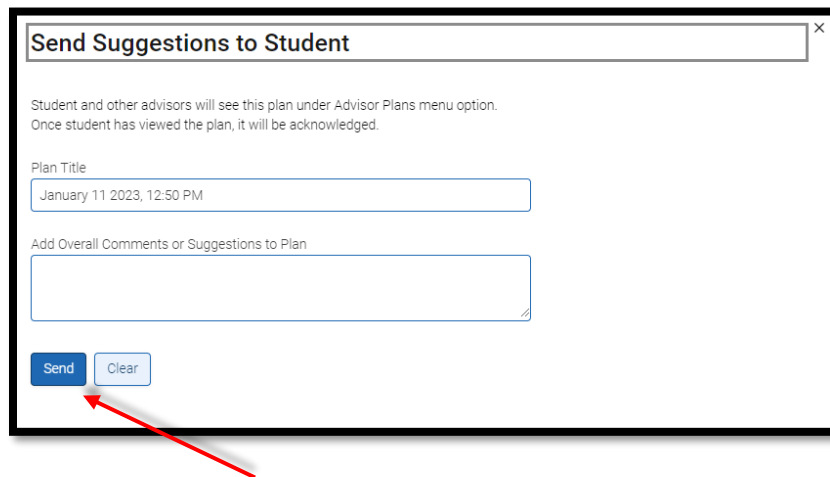


- You can view **Sent Advisor Plans**. These may be plans you previously sent, or that another advisor previously sent.
- You can view any **Draft Advisor Plans**. These are plans that have not been sent to the student.
- You can pull up the student’s **Degree Audit** to do an official graduation check.

21. Once you are finished making edits to your student’s plan, select your draft from the **Draft Advisor Plans** in the **Planning Tools** section in the left-hand panel. Then click **Send Plan to Student** on the right-hand panel.



22. This opens box that allows you to enter more information or comments to your plan before sending it. When you are ready, click **Send**.



23. Once you click **Send**, your comments and suggestions will be sent to the student’s Navigate App and the student will receive a notification to review your comments and suggestions.

Advanced Search, Watch Lists, Saved Searches

Knowing the Difference

1. Advanced Search:

Advanced Search uses different logic statements to build queries. Most search filters have the ability to create AND or OR statements. As you build a search by laying on various filters within or across drawers, the query will identify students that satisfy all the listed requirements.

2. Student Lists:

A Student List is a static list of students by student ID. You can use Student Lists in a variety of ways, such as maintaining a list of students to send messages or appointment campaigns. Student lists can be created using Advanced Search or by selecting students individually.

3. Saved Searches:

Saved Searches allow users to conduct a pre-configured Advanced Search without having to manually and repeatedly create a new Advanced Search. Unlike [Watch Lists](#), which save a static list of the same students, a Saved Search dynamically regenerates a list of students or users based on the search criteria. This feature can be especially helpful for users who frequently run the same search at different points in the term, as it allows you to maintain consistency with your search parameters.

To learn more about these functions, please contact [Christina Foreman](#).