

Navigate is a student-success platform offered by EAB. Implementation ran from approximately Sept 2019 – June 2020, and we turned it on beginning of July 2020. We are using a phased in approach to ramp up functionality in alignment with the university calendar and corresponding institutional priorities. Like Starfish, its predecessor at UM, Navigate is used to collect alerts (either one-off or via the formal progress report survey process), and for advisors and students to schedule meetings (and for advisors to record notes from those meetings).

Navigate users:

- Students (undergraduates only!)
- Advisors (based on Banner data)
- Instructors (all instructors, not just primary)
- Others – Athletics staff and Experiential Learning & Career Services staff. Can add others as we go.

Advisors use the system to schedule appointments with students. It syncs with Outlook (two way) to give students real time info about advisor availability.

- See <https://www.umt.edu/navigate/for-advisors/default.php> > Setting up your Availability
- See <https://www.umt.edu/navigate/for-advisors/default.php> > Appointment Campaigns
 - Population Selection Options
 - Assigned Students – should match the list advisors see in their home page (currently enrolled students!)
 - Advanced Search – can filter for specific parameters. For Assigned logic, must use a particular relationship type
 - Note the “My Students Only” option at the bottom of the screen; this is over ALL TIME.
- Troubleshooting tip: Reading the advisor availabilities tab from right to left informs what the student click path should be for scheduling an appointment. The main “gotcha” is that most services require the student to be formally assigned to the advisor in order to schedule an appointment. One exception is the “change my major” topic.

Advisors have a list of all of their advisees

- See Home Page (this is semester-specific and shows students who are currently registered AND assigned to you; assignment could be based on cohort, such as Honors, GLI, MT10, etc, or by virtue of a minor, etc.)
- Advisors can look up other advisors and see students assigned to them
- Navigate gets the most-future advising assignment that is present in Banner

Faculty can see list of all their students in their courses

- Be sure to select professor home page!
- When progress report surveys are sent out, they present to the instructor a big gold banner across the top of the screen. Getting to the Progress Report couldn’t be easier! And they can be completed over multiple sittings, unlike Starfish where all entries had to be made before you could save the record.

Students use the mobile version of Navigate primarily, but can get to the same platform via web page.

- Student platform includes holds info!

- Has a “to-do” list of items that are push notifications of things at appropriate intervals (such as FAFSA availability announcement); generally not audience-specific.
- Gives students ability to schedule appointments with their “success team”
- Has a calendar that includes their classes plus any scheduled appointments made in Navigate.

Reports:

- EAB has done a nice job of providing useful reports. (I don’t usually say this about canned reports, but I want to give credit here!)
- Report permissions are granted based on roles, and allow users to get relevant info on demand.
- Examples: Alerts report, Study Hall report (for Athletics), Check Ins (for Study Jam), Appointments report

Future Functionality:

- Faculty Office Hours
- Cases – these are “alerts” but with a specific workflow associated. They can be opened and closed.
- Study Buddies – this is an opt-in way for students to connect with classmates for the purpose of study groups. (Already exists; just not promoted much yet.)

Customizations:

- Layout is going to be the same from one school to another.
- Roles can be customized to determine which users see which data, but the layout would be the same.
- Let’s talk about Categories! These are ways schools can bring custom data points into Navigate.
 - Based on data present in Banner and are refreshed nightly. Example: first gen, athletes, residence halls, minors, holds, etc.
 - They are presented in alphabetical order, and typically have a preface to make like things group together.
- “DFW” (drop, fail, withdraw) includes “incompletes” because UM advisors requested this.
- Test Scores are listed on the Class Info tab at the bottom, and are custom to each school’s specs.

Take notes

- <https://www.umt.edu/navigate/for-advisors/default.php> > Advising Appointment Documentation

Send targeted messages

- Email best practices www.gunning-fog-index.com

Receive and send alerts

- See <https://www.umt.edu/navigate/for-advisors/default.php> > Instructions for Advisors on Pulling Early Alert Reports

Other features that may be useful

- UM Documentation: <https://www.umt.edu/navigate/>
 - Includes link to the Training Site; training site won't send any messages; feel free to play!
- Summary of UM holds and how to resolve: <http://www.umt.edu/holds/>
- In-product support: click on the question mark > Help Center > Help Center (must be logged in to Navigate, or else you get error shown below!)
- If you encounter a problem, use the tools at your disposal. If still stuck, email OSS (see below). If possible, provide an example student and/or screenshots.
- Note that many of the things that appear on the right side are also in the Actions dropdown menu; Sadly, the word "actions" appears on both sides of the screen, which is confusing.
- Bookmark the Download Center for Reports <https://umt.campus.eab.com/downloads>
- Be aware of a fairly literal interpretation of the "academic term". There may be some weirdness the day after a semester ends.
- I'm putting Alecia Gray as a helpful feature. 😊 She's logged more time in the Navigate platform than I have!

Discussion topics for UM consideration

- How comfortable are you with Excel?
- Current Issues we are addressing:
 - Students replying from email
 - Student photos not yet in Navigate

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This is a screen shot of the authentication error you'll encounter when trying to get to a Help Center article without being logged in to Navigate. The remedy: login to Navigate first, then go to the question mark icon on top right, choose Help Center, and then Help Center again. Choose a topic to search for, such as "categories". Then the URL you were attempting to use should work, as your authentication in their support site will now be cached.

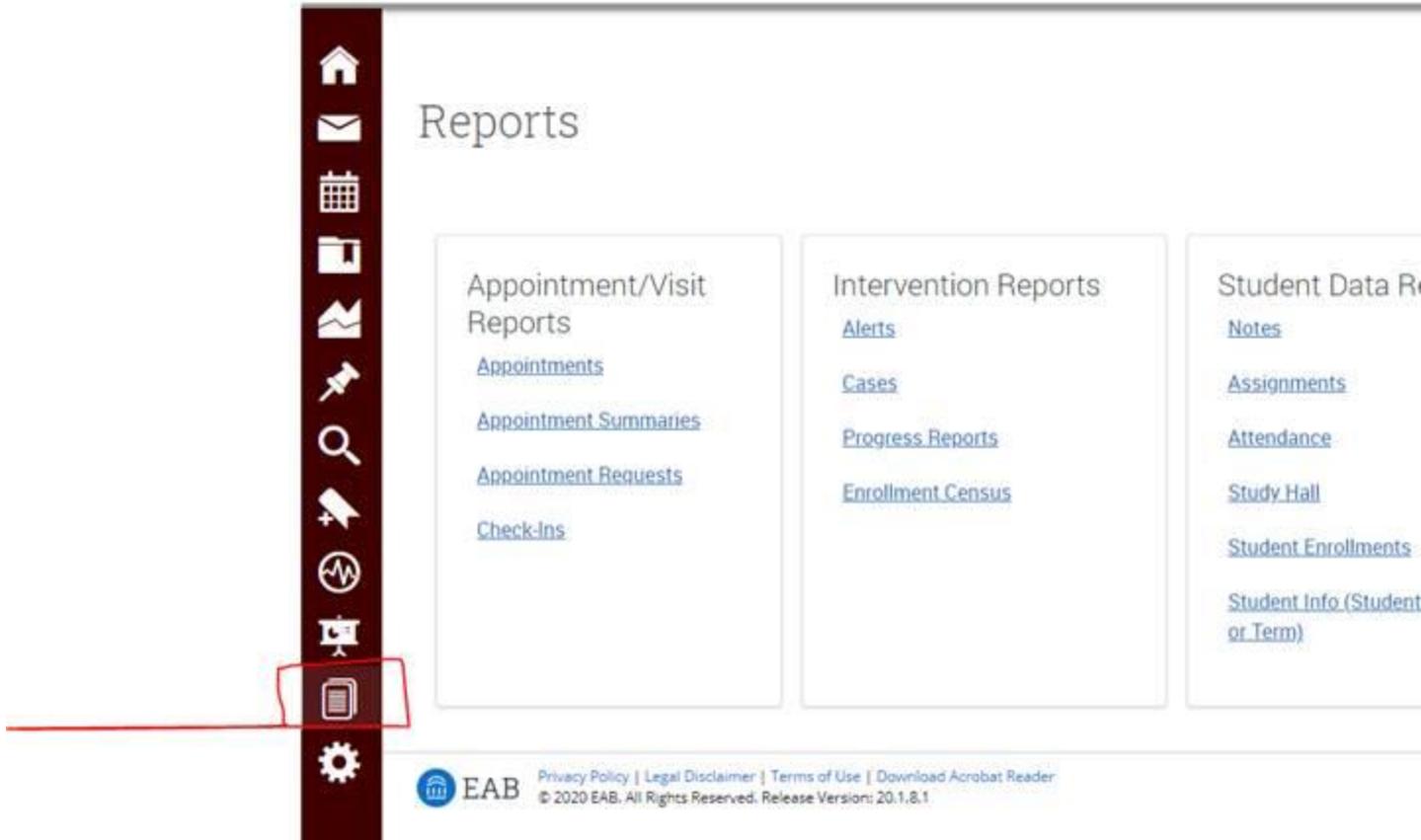


User Name:

Password:

[Forgot your password?](#)

Reports in Navigate: These are all of the vendor-provided reports. Data Office staff have access to all of the reports, but other users will only have a subset. To get to reports, click on the icon shown circled below, from the menu on the left.



Thanks for the opportunity to meet with you!

Lindsey

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