



### Quick Start Guide for Navigate

1 RWH 'DPH RI 0DU\ODQG has launched Navigate 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://qgp-campus.eab.com>

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 Outlook 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' dropdown 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

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## 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.

[Add Time](#) -

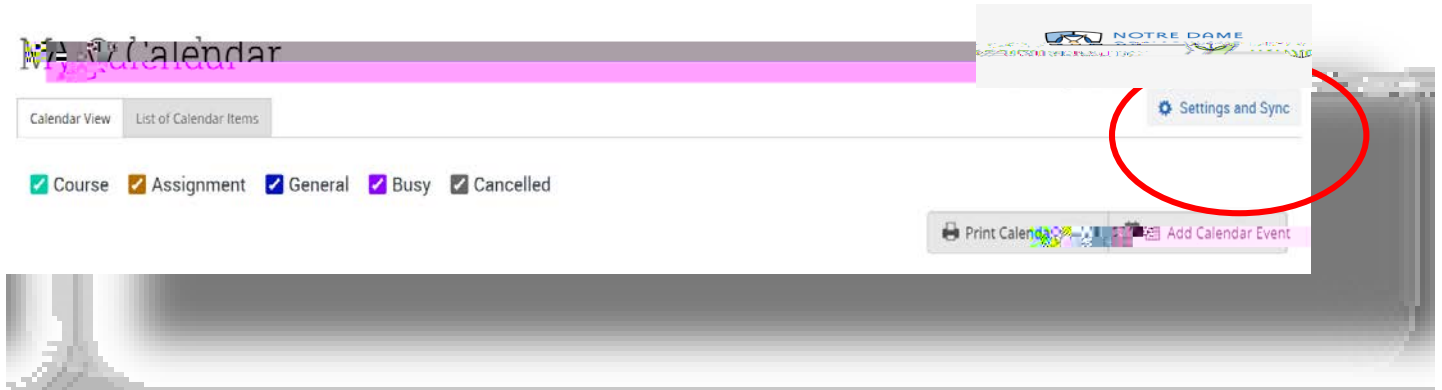
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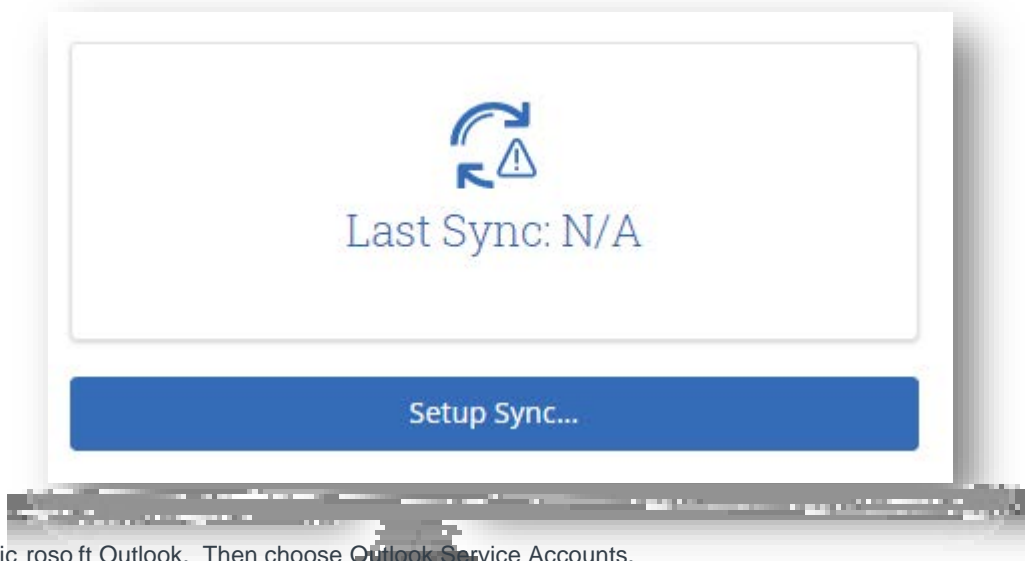
# Appendix B: Sync Your Calendar

## Individual User Permissions Setup: Outlook

1. Login to the platform. From the advisor homepage, click on the “Calendar” icon in the purple menu to the left.
2. Click “Settings and Sync” in the upper right corner.



3. Click “ Set up Sync”



4. Choose Microsoft Outlook. Then choose Outlook Service Accounts.

Setup Complete! Navigate will begin to sync data. You can leave this page if desired but please allow up to 5 minutes for the data to fully sync.

Note : I ignore if shown “Will be deprecated in 2020” . It doesn't apply to our configuration but are unable to change the message.

# Appendix C: Creating an Appointment Campaign

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

