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|  | **Navigate Administrator Guidebook** |
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# Introduction

Welcome to your Navigate Administrator Guidebook, a tool to track the rationale behind foundational Navigate decisions. It is a recorded history and dynamic document, used to codify the process of maintaining and expanding Navigate.

**How to use:**

The Navigate Administrator Guidebook will cover the topics outlined in the Table of Contents below. Each section will include a set of questions that will guide you as you document decisions that were made for your school. Additionally, you’ll find key audit recommendations and where to learn more from EAB. Complete this document in full and revisit it annually to make updates. Reference this document as needed as you have questions about the reasoning behind Navigate process decisions made on your campus.

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# Data Management and Infrastructure

**Introduction**

Your work in Navigate relies on accurate data imported from your Student Information System (SIS). Understanding what data points you are importing, from which tables in your SIS, and how your institution defines each data point is crucial. This section is designed to help you think through and document your data import decisions.

**Decisions**

1. Are your Navigate data imports primarily managed by you or by EAB’s Data Integration Services?   
   Click or tap here to enter text.
2. Who is your point of contact on campus for the following:
   * Calendar Sync Setup/Issues: Click or tap here to enter text.
   * Single Sign-On Setup/Issues: Click or tap here to enter text.
   * Data File Changes/Issues: Click or tap here to enter text.
3. What is your process for making data changes?   
   Click or tap here to enter text.
4. What is your active student/staff logic?   
   Include link here to supplemental material that includes active student/staff logic if applicable

**Documentation Recommendations**

* Keep an Excel workbook that documents your active student/staff logic (i.e., what SIS tables and fields you’re pulling from) and link to that Excel workbook in this Guidebook. Do so for other data types mentioned throughout this Guidebook, including Categories, Roles, and Relationships logic details.   
    
  My active student/staff logic workbook can be found here: Click or tap here to enter text.

**Learn More**

* [Help Center: Navigate Staff Validation Exercise](https://helpcenter.eab.com/hc/en-us/articles/360060506453-Module-4-Validating-Your-Site)
* Get in Touch with Navigate Partner Support: Click the Support button on the bottom of your Navigate Site, or email [NavigateTechSupport@eab.com](mailto:NavigateTechSupport@eab.com) to submit a ticket.

# Roles and Permissions

**Introduction**

Roles are used in Navigate to ensure that individuals have access to information and Navigate functionality that are relevant to their workflows and compliant with FERPA and other policies at your institution.

**Decisions**

1. Which of your role assignments are automated, i.e., imported from your Student Information System?   
   Include link here to supplemental material that includes role logic if applicable
2. What is your process for creating a new automated role?  
   Click or tap here to enter text.
3. Which of your role assignments are manually maintained (assigned) in Navigate?   
   Click or tap here to enter text.
4. What is your process for creating a new manually maintained role?   
   Click or tap here to enter text.
5. How do you handle requests for role assignments?   
   Click or tap here to enter text.
6. Do you ever assign one-off permissions?   
   If so, in what scenarios have you assigned one off permissions?
7. What training is required before a Navigate role is assigned?   
   Click or tap here to enter text.
8. What is your process for auditing roles?  
   Who audits? When and how frequently?

**Audit Recommendations**

Use Navigate’s Roles Reports when auditing Roles and Permissions. To find these Reports, click on the gear icon on the bottom left toolbar in Navigate. Click on Role Configuration & Access under the User Management bucket of settings. Below, see the purpose of each of the two Reports:

* To view which Navigate permissions are assigned to each of your user roles, use the Export Role Permissions Report**.**
* To view which Navigate users are assigned to each of your user roles, use the Export Role Users Report.

**Learn More**

* [Help Center: User Roles and Role Management Setup and Maintenance Article](https://helpcenter.eab.com/hc/en-us/articles/360012622513-User-Roles-and-Management)
* [Help Center: Roles & Permissions Configuration Webinar](https://helpcenter.eab.com/hc/en-us/articles/4418007905047-Roles-Permissions)
* Get in Touch with Navigate Partner Support: Click the Support button on the bottom of your Navigate Site, or email [NavigateTechSupport@eab.com](mailto:NavigateTechSupport@eab.com) to submit a ticket.

# Categories, Tags, and Student Lists

**Introduction**

Categories and Tags are system-wide identifiers or student attributes that make it easier to work with cohorts of students. Student Lists allow individual staff users to create cohorts of students that they can then search for and work with using Navigate functionality.

**Decisions**

1. What is the logic for each of your Categories?   
   Include link here to your completed Categories Request form.
2. Which of your Categories are associated with Care Units?   
   Click or tap here to enter text.
3. What Tags do you use?   
   When are each of your tags added/removed from the student profile?
4. What is the process for creating a new Tag?   
   Click or tap here to enter text.
5. Which roles and/or users have permissions to manage Tags, i.e., create a new Tag type?   
   Click or tap here to enter text.
6. What naming conventions do you have for Student Lists?  
   Click or tap here to enter text.

**Audit/Maintenance Recommendations**

* Tags are most effectively used when centrally managed. This means end-users can add an existing Tag type (such as Student Athlete) to a Student Profile but cannot create a new Tag type. You can achieve this by limiting the “Create Student Tags” permissions to only the Application Administrator role. Audit your role permissions using the Export Role Permissions Report.
* One way to keep Tags up to date is to remove any Tags from a student’s profile that are no longer relevant after each term. To easily find and remove these Tags, consider adding the term name to the Tag name.

**Learn More**

* [Help Center: Categories – Configuration and Maintenance Article](https://helpcenter.eab.com/hc/en-us/articles/360014216373)
* [Help Center: Tags Overview Article](https://helpcenter.eab.com/hc/en-us/articles/360014604894-Tags)
* [Help Center: Tags – Managing Tags Article](https://helpcenter.eab.com/hc/en-us/articles/217875078)
* [Help Center: Student Lists Overview Article](https://helpcenter.eab.com/hc/en-us/articles/360014185453-Student-Lists)
* Get in Touch with Navigate Partner Support: Click the Support button on the bottom of your Navigate Site, or email [NavigateTechSupport@eab.com](mailto:NavigateTechSupport@eab.com) to submit a ticket.

# Relationship Types

**Introduction**

Relationship Types denote student-to-staff relationships in Navigate. Relationship Types make it easier for staff to work with their assigned students and easier for students to contact their assigned staff members.

**Decisions**

1. Which of your Relationship Types are automated, i.e., imported from your Student Information System?   
   Include link here to supplemental material that includes Relationship Type logic if applicable.
2. Which of your Relationship Types are manually maintained (assigned) in Navigate?   
   Click or tap here to enter text.
3. What is the process for assigning manually maintained Relationships?   
   Click or tap here to enter text.
4. What Relationships exist in your Student Information System that you are not automating assignments in Navigate for?   
   Click or tap here to enter text.
5. Do you have a Navigate Relationship between Instructors and Students?   
   Click or tap here to enter text.

**Audit/Maintenance Recommendations**

* Automate as many Relationship Types as possible. This means when a student is assigned or unassigned to a staff member in your SIS, that assignment will automatically be reflected in Navigate on the following day via our nightly file imports. Automated Relationships will be easier to maintain than Relationships manually assigned in Navigate.

**Learn More**

* [Help Center: Relationship Types Overview Article](https://helpcenter.eab.com/hc/en-us/articles/360011721793#h_3f74bf9e-4b4c-41c6-acc6-c8558110b6fd)
* [Help Center: Custom Relationship Types Feature Video](https://helpcenter.eab.com/hc/en-us/articles/360041687614-Custom-Relationship-Types)
* Get in Touch with Navigate Partner Support: Click the Support button on the bottom of your Navigate Site, or email [NavigateTechSupport@eab.com](mailto:NavigateTechSupport@eab.com) to submit a ticket.

# Care Units

**Introduction**

A Care Unit is an entity in Navigate that allows any team to support students on their path to graduation via customized appointment scheduling, reporting, and access to data. This allows us to create a collaborative model in which Care Units work in tandem in one centralized system to support students holistically.

**Decisions**

1. What Care Units exist in your site, and what is the philosophy around your organizational approach? Which future Care Units are you planning to roll out and when?  
   What is the reasoning behind the name of each Care Unit? Which offices are bucketed into once Care Unit and why?
2. Who is the point of contact for each of your Care Units?  
   Click or tap here to enter text.
3. When and how does your Navigate leadership meet with the point of contact for each Care Unit to review how each Unit is using Navigate and to determine opportunities for increased process efficiency or functionality expansion?   
   Click or tap here to enter text.
4. What are the privacy policies around data and information associated with each Care Unit?   
   Consider Categories, Appointment Summaries, Alerts and Cases, and Report information that can be made private to users with permissions for a specific Care Unit via Role Permission configurations.
5. Which of your Alerts/Cases are associated with a Care Unit and why?   
   Click or tap here to enter text.

**Audit/Maintenance Recommendations**

* Revisit your organizational approach to the Care Units in your site. Do you need to change your philosophy or naming convention, e.g., to make scheduling simpler for students or to create privacy guardrails around appointment data?
* What additional support offices can you bring in to Navigate, and how will they fit within your existing Care Unit support structure? What is the ideal timeline to bring these new users in (consider configuration adjustments and end-user training requirements)?

**Learn More**

* [Help Center: Care Unit Resources Center](https://helpcenter.eab.com/hc/en-us/articles/360011632574-Care-Unit-Resource-Center)
* [Help Center: Care Unit Configuration Webinars](https://helpcenter.eab.com/hc/en-us/articles/4418002153367-Care-Units-Scheduling-)
* Get in Touch with Navigate Partner Support: Click the Support button on the bottom of your Navigate Site, or email [NavigateTechSupport@eab.com](mailto:NavigateTechSupport@eab.com) to submit a ticket.

# Appointment Scheduling

**Introduction**

Navigate’s Appointment Scheduling functionalities allow students to proactively find and book available time with staff members across offices in one platform.

**Decisions**

1. What offices are using Navigate for Appointment Scheduling? Who is your point of contact for each?  
   Click or tap here to enter text.
2. Do you support virtual appointments? If so, what is your process for managing these appointments?   
   Click or tap here to enter text.
3. Do you use drop-in functionality? If so, how do you support drop-ins?   
   Click or tap here to enter text.
4. Do you use Kiosk or Appointment Center functionalities?   
   Click or tap here to enter text.
5. What is your naming convention for Locations?   
   For example, do you use physical location names such as ‘Whitehurst Hall’, Support Office Names such as ‘My faculty office’?
6. What are the expectations around reporting on appointments? Is this information used for proactive outreach?  
   Click or tap here to enter text.

**Audit/Maintenance Recommendations**

* Before each term, impersonate a sample of students and click through the student scheduling experience. If you have trouble finding available times and need to make adjustments, here are a few settings in Navigate to review:
  + Availabilities Report: Run the Availabilities Report prior to each term to make sure there is availability set up for the Care Units and Services you expect students to be able to schedule for.
  + Location Restrictions: There are many scheduling restrictions that can be put into place within the Location configurations, such as allowing students to meet only with their assigned staff member and limiting scheduling to a particular category of students or students in a specific major.
  + Service Category Configurations: Found in the Care Unit configurations, you can restrict scheduling for a service category to a category of students or students in a specific major.
  + No-Show Configurations: Found within the Care Unit configurations in the Appointment Scheduling tab, you can block students from scheduling an appointment after hitting a certain threshold of appointment no-shows within a specified time frame.

**Learn More**

* [Help Center: Care Unit Resources Center](https://helpcenter.eab.com/hc/en-us/articles/360011632574-Care-Unit-Resource-Center)
* [Help Center: Appointment Scheduling Configuration Webinars](https://helpcenter.eab.com/hc/en-us/articles/4418002153367-Care-Units-Scheduling-)
* Get in Touch with Navigate Partner Support: Click the Support button on the bottom of your Navigate Site, or email [NavigateTechSupport@eab.com](mailto:NavigateTechSupport@eab.com) to submit a ticket.

# Alerts, Cases, and Intervention Pathways

**Introduction**

Navigate allows student support staff to submit feedback about students via Alerts. An issued Alert then kicks off a downstream follow-up process, called an Intervention Pathway. Intervention Pathways are designed by you so that the appropriate actions or next steps are taken based on the nature of the feedback submitted in Navigate.

**Decisions**

1. What is the Intervention Pathway for each of your Alert Reasons? Specifically, document which Alerts send automatic emails to students/staff and which Alerts open Cases.  
   Click or tap here to enter text.
2. What are the business process and expectations around Case management?   
   Click or tap here to enter text.
3. Who is the point of contact for oversight of Case management processes, such as ensuring Cases are closed in a timely manner and reassigning Cases as needed?  
   Click or tap here to enter text.

**Audit/Maintenance Recommendations**

* It is best practice to close the loop and thus close each Case that is opened in Navigate. At the end of each term, administratively close all remaining open Cases en masse. Do so by clicking on the Cases icon on the left side toolbar, filtering only to cases with status: open, select all, and under the Actions drop-down menu, click Close. Use a Case outcome such as “End of Term Administrative Close” to track Cases closed in this manner.
* If two Alert Reasons are similar in nature and have similar Intervention Pathways (for example, they both send an email to a student’s assigned advisor), consider combining those Alert Reasons into a single entry. This means fewer Alert Reasons in the drop-down menu for staff to choose from and fewer configurations for you to create and maintain as Application Administrator. It is a win-win!
* Role Permissions: Use the Export Role Permissions Report to view which roles have each of the Alert and Case permissions enabled. Adjust as needed.

**Learn More**

* [Help Center: Coordinating End-to-End Early Alerts Article](https://helpcenter.eab.com/hc/en-us/articles/360014218673-Coordinating-End-to-End-Early-Alerts)
* [Help Center: Alerts & Cases Configurations Quick Start Guide](https://helpcenter.eab.com/hc/en-us/articles/360014161114)
* [Help Center: Alerts and Cases Configurations Webinar](https://helpcenter.eab.com/hc/en-us/articles/4418007967383-Alerts-Cases-)
* Get in Touch with Navigate Partner Support: Click the Support button on the bottom of your Navigate Site, or email [NavigateTechSupport@eab.com](mailto:NavigateTechSupport@eab.com) to submit a ticket.

# Progress Reports

**Introduction**

Progress Reports are one method for staff to submit Alerts in Navigate. Specifically, Progress Reports are used by faculty to issue Alerts or to submit feedback on students on their class roster.

**Decisions**

1. At what point in each term do you send Progress Report Campaigns, i.e., proactive requests to faculty to submit feedback on their students?   
   Click or tap here to enter text.
2. Which students or courses are included in each Progress Report campaign (and why)?   
   Click or tap here to enter text.
3. Who creates and sends Progress Report Campaigns?   
   Click or tap here to enter text.
4. What is the naming convention you use for your Progress Report Campaigns?   
   Click or tap here to enter text.
5. Below, include sample text for the Email Subject and Email Message of your Progress Report Campaigns.   
   Click or tap here to enter text.
6. What is the process for communicating Progress Report completion expectations with professors?   
   Click or tap here to enter text.

**Learn More**

* [Help Center: Progress Report Campaigns Overview Article](https://helpcenter.eab.com/hc/en-us/articles/360011460434-Campaigns-Progress-Report-Campaigns)
* [Help Center: Launching a Progress Report Campaign](https://helpcenter.eab.com/hc/en-us/articles/360014085734-Launching-a-Progress-Report-Campaign) Article
* Get in Touch with Navigate Partner Support: Click the Support button on the bottom of your Navigate Site, or email [NavigateTechSupport@eab.com](mailto:NavigateTechSupport@eab.com) to submit a ticket.

# End-User Support and Training

**Introduction**

Navigate is a complex platform with a multitude of functionalities. It is thus essential to outline a process for training end-users on how to click through Navigate to accomplish their goals and to share expectations around Navigate usage.

**Decisions**

1. What is your process for training end-users on Navigate? Consider the following.
   * Who are your trainers?
   * What trainings do you offer live vs. trainings that are self-study on demand?
   * How often do you offer live training sessions?

Click or tap here to enter text.

1. Below, include links to any supplemental training documentation that you have created.  
   Click or tap here to enter text.

**Learn More**

* [Help Center: Training End Users Office Hours Webinar](https://helpcenter.eab.com/hc/en-us/articles/7819568631831-Office-Hours-Topic-Based-Special-Sessions" \l "h_01G96459SZDPJ8T3ES6MYJPJNM)
* [Help Center: Navigate Quick Start Guide for End Users](https://helpcenter.eab.com/hc/en-us/articles/360014219053-Quick-Start-Guide)
* [Help Center: Navigate Training Lesson Plans](https://helpcenter.eab.com/hc/en-us/sections/360011931733-Training-Lesson-Plans)