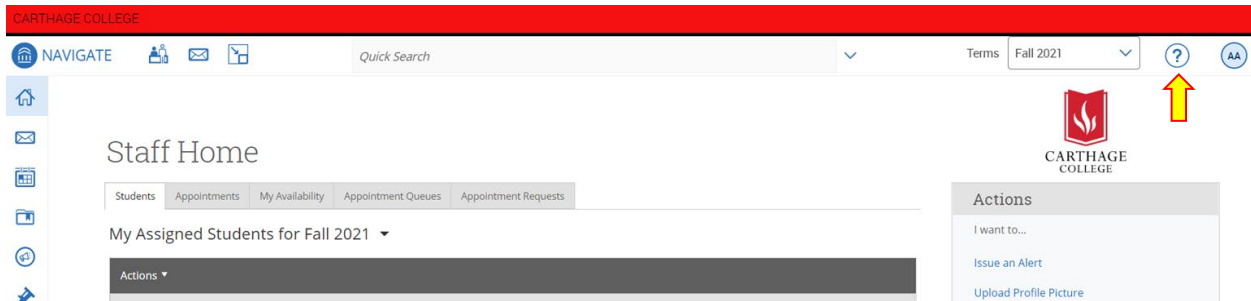# Getting Help in Navigate
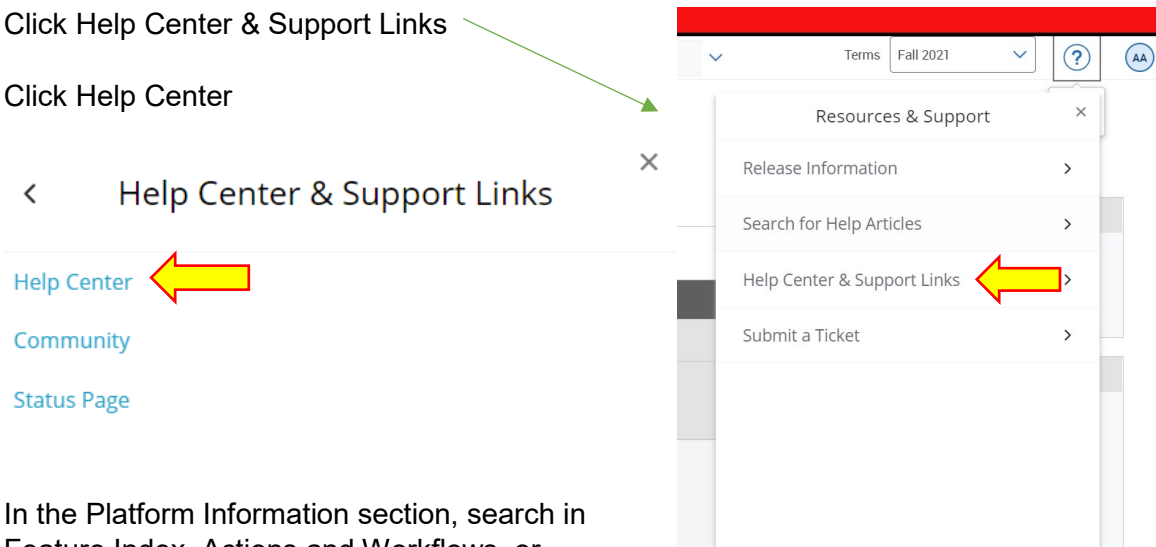
Using Navigate's Help Center

Objective: Information for user's to find the library of help resources in Navigate.

1. Log into Navigate
2. Click the? in the upper right corner

3. Click Help Center & Support Links

4. Click Help Center

5. In the Platform Information section, search in Feature Index, Actions and Workflows, or Troubleshooting and FAQ.

   a. Within Feature Index, most help articles related to feature functionality will be found under Strategic Care.

Navigate Terminology Cheat Sheet and Help Center Links

Objective: Guided Navigate Help Center Resource and Glossary

Term/Item	Definition	Help Center Pathways/Links (Login to Navigate to access links)
Advanced Search	Search engine that allows users to enter thousands of search parameters to allow for segmentation of the partner's student population.	Help Center > Platform Information > Feature Index > Strategic Care > Advanced Search Advanced Search User Guide_5.pdf (Download)
Alerts	A mechanism for any user (not just a professor or instructor) to draw attention to a student who may potentially be a risk due to a variety of factors.	Help Center > Platform Information > Feature Index > Strategic Care > Alerts
Appointment Center	Navigate scheduling feature used by Front Desk and Administration workers to manage the schedules and appointments of staff (including walk-in queue management).	Help Center > Platform Information > Actions and Workflows > Scheduling Appointments for Front Desk Workers
Appointment Summary Report	Summary of the content discussed during a tutoring or advising session and logged in to Navigate. The summary will be visible to other staff users.	Help Center > Platform Information > Actions and Workflows > Documenting a Student Interaction Help Center > Platform Information > Feature Index > Strategic Care > Appointment Summaries
Availability	Times that staff set within Navigate to allow scheduling. This can be for Drop-ins, Appointments, or Campaigns.	Help Center > Platform Information > Actions and Workflows > Syncing Your Calendar and Managing Your Availability in Navigate Help Center > Platform Information > Feature Index > Strategic Care > Syncing your Google Calendar to Navigate Help Center > Platform Information > Feature Index > Strategic Care > My Availability

Term/Item	Definition	Help Center Pathways/Links (Login to Navigate to access links)
Campaign	Proactive outreach strategy with a specific goal in mind, such as "Re Enroll students not yet registered for Fall"	Help Center > Platform Information > Actions and Workflows > Launching an Appointment Campaign Help Center > Platform Information > Actions and Workflows > Managing a Campaign Help Center > Strategic Resources > Toolkits & Guides > Student Intervention Campaigns Toolkit and Other Resources
Care Unit	The Coordinated Care Network is a network of coordinated support providers, connected by technology and processes, to make it easier for students to navigate the system and receive holistic support. Generally, student support offices are setup as "Care Units". Each Care Unit can enable student scheduling for offered services, manage appointment availability, view post-visit documentation, report on student interactions, and manage check-ins via a streamlined Kiosk system.	
Cases	A coordinated request across users prompting action and follow up on an alert, indicating a student is at risk. Often crosses department lines and includes areas such as Financial Aid, Counseling, etc.	Help Center > Platform Information > Feature Index > Strategic Care > Cases
Categories	Differentiating student attributes captured in a school's SIS system (e.g., Veterans, Athletes, Greek life).	Help Center > Platform Information > Feature Index > Advanced Search
Help Center	In-platform resource housing tutorial videos and helpful articles.	https://helpcenter.eab.com/hc/en-us
Intervention Effectiveness	Dashboards designed to assess the impact of in-platform (e.g., appointment campaigns) or offline (e.g., using a new tool in advising appointments) interventions on your student populations.	Help Center > Strategic Resources > Toolkits & Guides > Intervention Effectiveness Toolkit

Term/Item	Definition	Help Center Pathways/Links (Login to Navigate to access links)
Student Lists	A Student List is a static list of students by student ID. Can be used to maintain a list of students to track over time.	Help Center > Platform Information > Feature Index > Strategic Care > Student Lists
Saved Searches	A pre-configured Advanced Search that allows for consistency of search parameters. Saved Searches are dynamic and students who do not meet the criteria of the search will not populate.	Help Center > Platform Information > Feature Index > Strategic Care > Saved Searches
Major Explorer	Feature that presents various alternative majors, associated risk levels, and typical salary bands for careers associated with a given major. Information is sourced from national governmental career data.	
Notes	A relevant piece of information attached to a student's profile in Navigate. Notes are accessible to students.	Help Center > Platform Information > Actions and Workflows > Documenting a Student Interaction Help Center > Platform Information > Feature Index > Strategic Care > Notes
Population Health Dashboards	Dashboards that allow designated users to track key academic performance and progress indicators that help identify intervention opportunities across discrete student populations.	Help Center > Platform Information > Feature Index > Intelligence > Population Heath Dashboard
Professor Home	The Professor Home page is a specialized home page in Navigate that allows faculty users to view key tools that enable them to take action on tasks such as filling out Progress Reports, recording class attendance, or managing assignments. Must have the Professor standard user type assigned.	Help Center > Platform Information > Feature Index > Strategic Care > Professor Home
Progress Reports/Early Alerts	Enables a professor or instructor to indicate how a specific student is performing in class.	Help Center > Platform Information > Feature Index > Strategic Care > Campaigns: Progress Report Campaigns Help Center > Platform Information > Feature index > Strategic Care > Alerts

Term/Item	Definition	Help Center Pathways/Links (Login to Navigate to access links)
Reports	Snapshots of real-time activity happening in the site by location, service or staff member, designed for assessment and resource allocation.	Help Center > Platform Information > Feature Index > Strategic Care > Reports
Risk Score	Compares the current student against your historical population to determine their likelihood to persist to the next term or to graduate from your institution (depending on the outcome of your Student Success Predictive Model).	Help Center > Strategic Resources > Training Resources > Intelligence Feature Videos > Predictive Risk Score and Predictive Influencers Video
Staff Home	The Staff Home page is where most users arrive when opening Navigate. It allows users to view key tools that enable them to take action on student success-related tasks.	Help Center > Platform Information > Feature Index > Strategic Care > Staff Home
Student Profile	The Student Profile puts important information about a student in one place. Depending on your role permissions, you can see information about a student's academic progress, interactions with staff or support offices, and interests and goals the student has.	Help Center > Platform Information > Actions and Workflows > Using Student Profiles to Prepare for Student Meetings
Student Success Predictive Model	Proprietary EAB algorithm that analyzes multitudes of data points with relative weightings to assign a predicted level of "risk" of the student not graduating given their major. Displays as Low, Moderate, or High and is designed to be used as a triage or prioritization mechanism.	Help Center > Platform Information > Feature Index > Intelligence > Student Success Predictive Model
Success Markers	Critical course milestones that are predictive of success in a given major. Fires an alert when a student does not pass a course at the recommended grade threshold or has not completed a course within the recommended credit range.	Help Center > Platform Information > Feature Index > Intelligence > Success Markers
Tags	Subjective information not captured in an SIS system (e.g., Students interested in taking GRE's or MCAT's). Short text labels that staff and faculty can apply to students used to track information about a group of students.	Help Center > Platform Information > Feature Index > Strategic Care > Tags

Carthage Help Desk and Escalation Support for Navigate

End User Troubleshooting Navigate Steps:

1. Check the Navigate Help Center
2. Check Carthage's Navigate resources
3. Navigate webpage on carthage.edu
4. https://carthage.libanswers.com
5. Email navigate@help.carthage.edu

Steps When a Support Ticket is Submitted to Request Tracker

1. Navigate@help.carthage.edu will route to a Navigate queue in Request Tracker
2. Tickets will be triaged to the Navigate Application Administrator or Program Owner for follow up as needed
3. For issues that need to be escalated to EAB, communication will primarily be between the App Admin and/or Program Owner and EAB
4. Navigate Administrators will use the Submit a Ticket form to enter submissions to the EAB Partner Support Team (App Admins See: How to Submit and Track an EAB Support Ticket)
5. The originator of the ticket may be included if more details are needed
6. If the originator has been included, EAB will provide status updates to the originator