

Dickinson

NAVIGATE your Way to a Smoother Advising Month!

Using Navigate360 Student Success for Faculty

Presented by Student Success and Academic Advising

February 2025

Quick Survey!

Which best describes you?

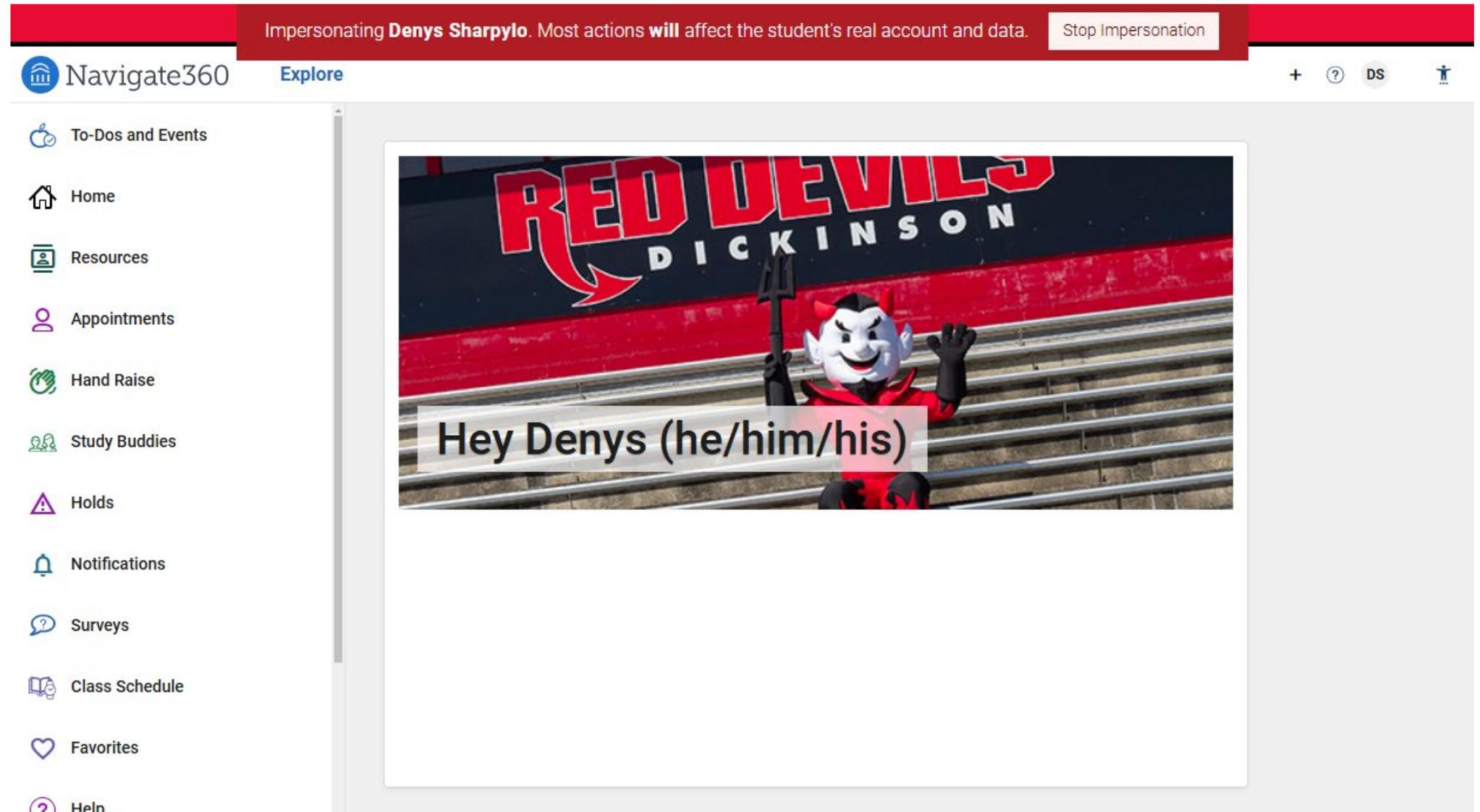
I've never opened
Navigate.

I've opened Navigate
and tried it out, but I'm
not using it regularly.

I'm using Navigate
regularly and am looking
for more tips and tricks!

What Do Students See?

- **To-Dos**
- **Resources**
(campus departments, places to eat, etc.)
- **Hand Raise**
(ask for help)
- **Study Buddies**
- **Holds**



What Do Students See?

Appointment Scheduling

- Organized by unit (faculty, Campus Life, etc.)
- Clicking **Meet With Your Success Team** shows advisors, faculty, coaches, financial aid, etc.

Impersonating **Denys Sharpylo**. Most actions **will** affect the student's real account and data. [Stop Impersonation](#)

Navigate360 [Explore](#) + ? DS

[To-Dos and Events](#)

[Home](#)

[Resources](#)

[Appointments](#)

[Hand Raise](#)

[Study Buddies](#)

[Holds](#)

[Notifications](#)

[Surveys](#)

[Class Schedule](#)

[Favorites](#)

[Help](#)

[Go Back](#) [Dashboard](#)

New Appointment

Below, you will find available options for scheduling an appointment. If you cannot find something that you are looking for, try the other appointment options to see available options for dropping in or requesting an appointment.

What can we help you find?

What type of appointment would you like to schedule? *

Faculty x v

Service *

Academic Advising Session-30 minute x v

Pick a Date ⓘ

February 14, 2025 v

[Find Available Time](#)

Other Options

[View Drop-In Times](#)

[Meet With Your Success Team](#)

Primary Goals for Today

- Sync your Calendar
- Set Up your Availability
- Search for a Student
- Open Degree Works/CLIQ Student Profile
- Email a Student OR Group of Students
- Set up an Appointment Campaign

Secondary Goals for Today (if we have time!)

- Adjust User Settings
- Set up your Email Signature
- Issue an Alert
- Report on an Appointment

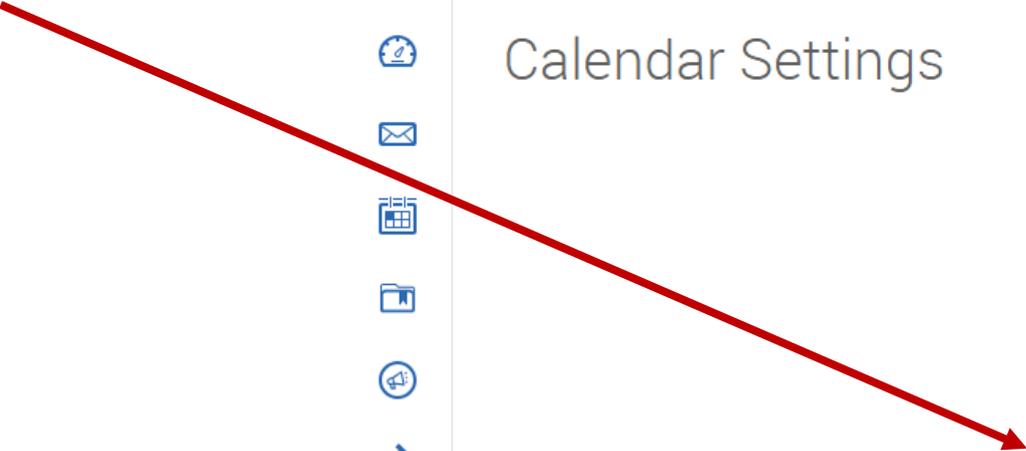
Sync your Calendar

1. Click the **Calendar** icon on the left side.
2. Click **Settings and Sync** on the right side.

The screenshot shows the Dickinson College 'My Calendar' page. The header includes 'DICKINSON COLLEGE' and 'Navigate360 | STUDENT SUCCESS'. A left sidebar contains navigation icons, with the calendar icon circled in red. The main content area is titled 'My Calendar' and has two tabs: 'Calendar View' (selected) and 'List of Calendar Items'. A 'Settings and Sync' link is circled in red in the top right. Below the tabs, there is a legend for event types: Course, Assignment, General, Busy, Cancelled, School Wide Event, and Event Rsvp. A calendar grid for February 2025 is shown, with several dates (26-30 and 2-6) redacted with black bars. The Dickinson logo is visible in the top right corner.

Sync your Calendar

3. Click **Setup Sync...**



The screenshot shows the Dickinson College Navigate360 Student Success interface. At the top, a red header bar contains 'DICKINSON COLLEGE'. Below it, a navigation bar includes 'Navigate360 | STUDENT SUCCESS' and various utility icons. The main content area is titled 'Calendar Settings' and features the Dickinson logo on the right. In the center, there is a box with a refresh icon and the text 'Last Sync: N/A'. Below this box, a blue button labeled 'Setup Sync...' is circled in red. The footer contains the EAB logo, copyright information, and a page refresh timestamp.

Sync your Calendar

4. Click **Microsoft Office 365**.
5. Follow the prompts to finish connecting to your Dickinson calendar.

DICKINSON COLLEGE

Navigate360 | STUDENT SUCCESS

Calendar Settings: Setup

Dickinson

Please Choose Your Calendar Application.

- Microsoft Office 365 (Latest Version)
- Google Calendar
- Other Applications
- Go back...

EAB | Privacy Policy | Legal Disclaimer | Terms of Use | Download Acrobat Reader

© 2025 EAB. All Rights Reserved. Release Version: 25.3.1

Page last refreshed at 2:39pm
All times listed are in Eastern Time (US & Canada) | Additional Modes

Set Up your Availability

1. Go to **Home** (if not there already).

2. Click **My Availability**.

3. Click **Actions**.

4. Click **Add Time**.

The screenshot shows the Dickinson College Staff Home page. The top navigation bar includes the Dickinson College logo, 'Navigate360 | STUDENT SUCCESS', and various utility icons. The main content area is titled 'Staff Home' and features a tabbed interface with 'My Availability' selected. Below the tabs, the 'Available Times' section is visible, which is partially obscured by a large red redaction box. A dropdown menu is open over the 'Available Times' section, showing options: 'Add Time', 'Copy Time', 'Delete Time', 'Add to Personal Link', and 'Remove from Personal Link'. The 'Add Time' option is highlighted with a red circle. The right sidebar contains sections for 'Actions', 'Quick Links', and 'Upcoming Appointments'. A footer note states: '* All times listed are in Eastern Time (US & Canada)'.

Set Up your Availability

5. Select days and enter times. *(Note: If you want different times on different days, create multiple availabilities!)*
6. Decide when availability is active.
7. Check box to add to your availability link.
8. Select **Appointments** and **Campaigns**.
9. Select meeting type(s).

The screenshot shows the Dickinson College 'When are you available to meet?' form. Red circles and arrows highlight key features: the day selection tabs (Mon-Sun), the time range (From 1:00pm to 4:00pm), the active term dropdown (Spring 2025), the checkbox for adding to the personal availability link, the meeting type selection (Appointments, Drop-ins, Campaigns), and the meeting type options (In-Person, Virtual). The form also includes fields for Care Unit (Faculty) and Location (Faculty Office), and buttons for Cancel and Save.

Set Up your Availability

10. In Care Unit, select **Faculty**.

11. In Location, select **Faculty Office**.

12. Add whichever **Services** you choose.

13. Add your **Zoom link & Special Instructions**. (be sure to include office number for in person appointments!)

14. Click **Save**.

The screenshot shows the Dickinson College Navigate360 Student Success interface. The 'My Availability' form is open, and several fields are highlighted with red circles and arrows:

- Care Unit:** A dropdown menu with 'Faculty' selected.
- Location:** A dropdown menu with 'Faculty Office' selected.
- Services:** Two checkboxes are selected: 'Academic Advising Session-15 minute' and 'Academic Advising Session-30 minute'.
- Special Instructions for Student:** A text area with a rich text editor toolbar. A redacted area (blacked out) is present, and an arrow points to it from the instruction text. Below the redaction, the text 'e.g. room 23, please bring paper' is visible.
- Save Button:** A blue button labeled 'Save' is circled in red.

Other visible elements include the Dickinson College logo, 'Navigate360 | STUDENT SUCCESS' header, and a sidebar with 'Actions' (Issue an Alert, Upload Profile Picture), 'Quick Links' (School Information, Appointment Campaigns), and 'Upcoming Appointments' (You have no upcoming appointments).

Find your Personal Availability Link

1. Your **Personal Availability Link** will show at the bottom. Click Copy to copy it.
2. Consider adding this to your email signature!

The screenshot shows the Dickinson College Staff Home page. At the top, there is a red header with "DICKINSON COLLEGE" and a navigation bar with "Navigate360 | STUDENT SUCCESS" and various icons. The main content area is titled "Staff Home" and has tabs for "Students", "Appointments", "My Availability", and "Appointment Queues". Under "My Availability", there is a section for "Available Times" with a table that is mostly redacted. Below the table, there is a "Personal Availability Link" section. This section contains a "Link:" label, a redacted URL, and a blue "Copy" button. A red circle highlights the "Copy" button, and a red arrow points from the text in the first list item to this button. Below the link, there is a note: "*Please be advised, no availabilities are currently associated with your personal availability link." On the right side of the page, there are several panels: "Actions" with links for "Issue an Alert" and "Upload Profile Picture"; "Quick Links" with links for "School Information" and "Appointment Campaigns"; and "Upcoming Appointments" which states "You have no upcoming appointments."

Search for a Student

1. Use the Search bar in the top to search by name or Banner ID.
2. Click **Enter** when the student appears OR click on their name from the list.

The screenshot shows the Dickinson College Staff Home page. At the top, there is a red navigation bar with the text "DICKINSON COLLEGE" and "Navigate360 | STUDENT SUCCESS". Below this, there is a search bar with a magnifying glass icon, which is circled in red. A red arrow points from the search bar to the first step of the instructions. The main content area is titled "Staff Home" and has tabs for "Students", "Appointments", "My Availability", and "Appointment Queues". The "Assigned Students" section is active, showing a list of students with columns for "NAME", "ID", "STUDENT LIST", and "CATEGORY". The list is currently empty, with only the column headers visible. On the right side, there are several panels: "Actions" with links for "Issue an Alert" and "Upload Profile Picture"; "Quick Links" with links for "School Information" and "Appointment Campaigns"; and "Upcoming Appointments".

Open Degree Works/CLIQ Student Profile

1. On a student record, scroll down.
2. Use the **Degree Works** and **CLIQ** links to open these resources **DIRECTLY** for the student.
(Note: You will need to sign into CLIQ each time you open your browser.)

The screenshot shows the Dickinson College Navigate360 Student Success interface. The header includes the Dickinson College logo and the text "DICKINSON COLLEGE". Below the header, there is a navigation bar with "Navigate360 | STUDENT SUCCESS" and several icons. The main content area is divided into several sections: "Overview", "Goals & Interests (supplied by the student)", "Favorite Resources" (displaying "None"), and "Categories". On the right side, there is a sidebar with various options: "Schedule an Appointment", "Add to Student List", "Issue an Alert", "Current Alerts", "Active Appt. Campaigns" (with a note that the student is not involved in any active campaigns), and "Links". The "Links" section is circled in red and contains three links: "Degree Works", "CLIQ Student Profile", and "Academic Bulletin". A red arrow points from the text in the instructions to the "Degree Works" and "CLIQ Student Profile" links.

Email an Individual Student

1. Search for the student you want to message.
2. Click **Message Student**.

The screenshot shows the Dickinson College Navigate360 Student Success interface. At the top, there is a red header with 'DICKINSON COLLEGE' and a navigation bar with 'Navigate360 | STUDENT SUCCESS' and various icons. The main content area displays the profile for a student named Sophia (she/her/hers). The profile includes tabs for 'Overview', 'Success Progress', 'History', 'Courses', 'Path', and 'More'. Below the tabs, there are several data points: Course Grade D/F, Repeated Courses, Withdrawn Courses, Missed Success Markers, Cumulative GPA, Total Credits Earned, and Credit Completion % at this Institution. On the right side, there is a sidebar with the Dickinson logo and an 'Options' section. The 'Options' section has a dropdown menu 'I want to...' with 'Message Student' circled in red. Other options include 'Add a Note on this Student', 'Add a To-Do to this Student', 'Report on Appointment', 'Create Request for Appointment', 'Schedule an Appointment', 'Add to Student List', and 'Issue an Alert'. Below the 'Options' section is a 'Current Alerts' section.

Email an Individual Student

3. Enter your **Subject Line** and **Message**.
4. Click the three dots and then **Merge Tags** to merge in any automated info.
5. Click **Send Message**. (Use **Preview Message** if you like!)

DICKINSON COLLEGE

Navigate360 | STUDENT SUCCESS

Sophia (she/her/hers)

Overview Success Progress History Courses Path More

Course Grade D/F Repeated Courses Withdrawn Courses Missed Success

Total Credits Earned Credit Completion % at this institution

Overview Student ID Classification Most Recent Enrollment

Send A Message

Subject:

Message:

Paragraph

Merge Tags

- Recipient Name
- Recipient First Name
- Recipient Last Name
- Personal Availability Link

Add Attachment:

Drag & Drop your files or Browse

Send Additional E-mail Notifications To:

Send Message Preview Message Send Sample Cancel

Email a Group of Students

1. Find your group of students. (Try to Relationship Type menu to sort out the types of students you may need to contact.)
2. Check off the students you want to contact. (Tip: Click the top checkbox to check all.)

DICKINSON COLLEGE

Navigate360 | STUDENT SUCCESS

Staff Home

Students | Appointments | My Availability | Appointment Queues

Assigned Students

List Type: Assigned Students | Term: Spring 2025 (Default T... | Relationship Type: Academic Advisor, Maj...

NAME	ID	STUDENT LIST	CATEGORY
1. <input checked="" type="checkbox"/>			
2. <input checked="" type="checkbox"/>			
3. <input checked="" type="checkbox"/>			
4. <input checked="" type="checkbox"/>			
5. <input checked="" type="checkbox"/>			
6. <input checked="" type="checkbox"/>			
7. <input checked="" type="checkbox"/>			

Actions

I want to...

[Issue an Alert](#)

[Upload Profile Picture](#)

Quick Links

Take me to...

[School Information](#)

Campaigns...

[Appointment Campaigns](#)

Upcoming Appointments

You have no upcoming appointments.

Email a Group of Students

3. Click **Actions**.
4. Click **Send a Message to Student**.
5. Follow the same steps as previously. (Use Merge Tags to personalize with student names!)

The screenshot displays the Dickinson College Staff Home interface. At the top, there is a red header with 'DICKINSON COLLEGE' and a navigation bar with 'Navigate360 | STUDENT SUCCESS' and various icons. The main content area is titled 'Staff Home' and includes tabs for 'Students', 'Appointments', 'My Availability', and 'Appointment Queues'. Below these tabs, there is a section for 'Assigned Students' with filters for 'List Type' (Assigned Students), 'Term' (Spring 2025), and 'Relationship Type' (Academic Advisor). A table with columns 'STUDENT LIST' and 'CATEGORY' is visible. A red circle highlights the 'Actions' menu, and a red arrow points to the 'Send a Message to Student' option. The right sidebar contains sections for 'Actions', 'Quick Links', and 'Upcoming Appointments'.

Set up an Appointment Campaign

1. Click the **Campaigns and Events** icon (looks like a megaphone) on the left side.

2. Click **Add New** under Appointment Campaigns.

The screenshot shows the Dickinson College Navigate360 interface. At the top, there is a red header with "DICKINSON COLLEGE" and a navigation bar with "Navigate360 | STUDENT SUCCESS" and various icons. On the left, a sidebar contains several icons, with the megaphone icon circled in red. The main content area is titled "Campaigns & Events" and features two columns: "Student Campaigns" and "Staff Campaigns". Under "Student Campaigns", there is a section for "Appointment Campaigns" with a description and a blue button labeled "+ Add New" circled in red. Below it is a section for "Messaging Campaigns". The "Dickinson" logo is visible in the top right corner of the interface.

Set up an Appointment Campaign

3. Choose a **Campaign Name**.

4. For Care Unit, select **Faculty**. For Location, select **Faculty Office**.

5. Select the appropriate service (Academic Advising Session-15 minute or 30 minute, depending on your preferred length).

6. Select the same appointment length.

The screenshot displays the Dickinson College Navigate360 Student Success interface. The main content area is titled "Campaign Configurations" and includes the following fields:

- Campaign Name ***: A text input field containing "Spring 2025 Course Request".
- Instructions or Notes for Landing Page:**: An empty text input field.
- Care Unit: ***: A dropdown menu with "Faculty" selected.
- Location: ***: A dropdown menu with "Faculty Office" selected.
- Service: ***: A dropdown menu with "General Student Appointment-30 n" selected.

Below the Campaign Configurations is the "Appointment Configurations" section, which includes:

- Appointment Limit: ***: A dropdown menu with "1" selected.
- Appointment Length: ***: A dropdown menu with "30 min" selected.
- Slots Per Time: ***: A dropdown menu with "1" selected.
- Allow Scheduling Over Courses

On the right side of the interface, there is a sidebar with the following sections:

- Objective**: Pending Setup...
- Recipients**: Pending...
- Staff**: Pending...
- Welcome Message**: Pending Setup...
- Campaign Ends**: Pending Setup...

Red circles and arrows highlight the "Campaign Name", "Care Unit", "Location", "Service", and "Appointment Length" fields, corresponding to the instructions in the text on the left.

Set up an Appointment Campaign

7. Select the types of reminders you want for yourself and each student.

8. Select the start and end date for the scheduling window (the earliest and latest dates student appointments can be scheduled).

9. Select the **Launch Date** you want the initial email to go out (usually today).

10. Click **Continue**.

The screenshot shows the Dickinson College Navigate360 Student Success interface. The page title is "DICKINSON COLLEGE" and the navigation bar includes "Navigate360 | STUDENT SUCCESS". The main content area is titled "Appointment Campaign" and contains several sections:

- Staff Reminders:** Includes checkboxes for "Email" (unchecked) and "Text" (unchecked).
- Recipient Reminders:** Includes checkboxes for "Email" (checked) and "Text" (checked).
- Scheduling Window:** Includes a text description and two date pickers: "Start Date" (March 3, 2025) and "End Date" (March 21, 2025).
- Launch Date:** Includes a text description and a date picker set to "February 12, 2025".

At the bottom of the form, there are three buttons: "Cancel", "Save and Exit", and "Continue >". The "Continue >" button is highlighted with a red circle and an arrow pointing to it from the instruction "Click Continue".

Set up an Appointment Campaign

11. Find the group of students you are sending the campaign to. There are many options for searching, but if you're sending to your advisees, an easy option is to go to **Assigned To**, select the relationship type, and then enter yourself as staff.

*Note: Your relationship type will be **Academic Advisor**, **Major** for students in your major, and **Undeclared** for undeclared students.*

12. Click **Search**.

The screenshot shows the Dickinson College Navigate360 Student Success interface. The top navigation bar is red with the text 'DICKINSON COLLEGE'. Below it, the 'Navigate360 | STUDENT SUCCESS' header is visible. The main content area is divided into several sections: 'Assigned To', 'Goals & Interests', 'Polls', and 'Nav Info'. The 'Assigned To' section is highlighted with a red circle and contains a dropdown menu for 'Student has relationship' (set to 'Undeclared') and a 'Staff' dropdown menu (set to 'Copus, Caitlin (she/her/hers)'). A red arrow points from the text 'go to Assigned To' to the 'Assigned To' section. Below the 'Assigned To' section, there is a 'Search' button, which is also circled in red, and two checkboxes: 'Include Inactive' and 'My Students Only'. A red arrow points from the text 'Click Search.' to the 'Search' button.

Set up an Appointment Campaign

13. Click the **checkbox** next to the students to include in your campaign. (The checkbox in the header will check all at once.)

14. Click **Continue**.

The screenshot shows the Dickinson College Navigate360 Student Success interface. At the top, there is a red header with 'DICKINSON COLLEGE' and a navigation bar with 'Navigate360 | STUDENT SUCCESS' and various icons. Below the navigation bar is a list of students. The first student is 'Abigail' and the last is 'Mackenzie'. Each student has a checkbox next to their name. A red oval highlights the checkboxes for the first seven students. A red arrow points from the text '13. Click the checkbox next to the students to include in your campaign.' to the first checkbox. Below the list is a pagination control with 'Previous', '1', and 'Next' buttons. To the right of the pagination control, it says '14 total results'. At the bottom of the interface, there are two buttons: '< Back' and 'Continue >'. A red oval highlights the 'Continue >' button, and a red arrow points from the text '14. Click Continue.' to this button.

Set up an Appointment Campaign

15. Click the **checkbox** in the header to select and confirm all students in the campaign.

16. Click **Continue**.

The screenshot shows the Dickinson College Navigate 560 interface. At the top, there is a red header with "DICKINSON COLLEGE" and a navigation bar with "Navigate 560 | STUDENT SUCCESS" and various icons. A sidebar on the left contains a list of icons. The main content area displays a table of students with checkboxes in the header and first column. The first student listed is "Abigail" and the last is "Mackenzie". A red circle highlights the checkbox in the header, and a red arrow points from the text "15. Click the checkbox..." to it. At the bottom of the interface, there are three buttons: "Back", "Add More Recipients", and "Continue". A red circle highlights the "Continue" button, and a red arrow points from the text "16. Click Continue." to it. On the right side of the interface, there is a panel with "Staff Pending...", "Welcome Message Pending Setup...", and "Campaign Ends Fri 03/21/2025".

Set up an Appointment Campaign

17. Click the **checkbox** next to your name.

18. Click **Continue**.

The screenshot shows the Dickinson College Navigate360 interface. At the top, there is a red header with "DICKINSON COLLEGE" and a navigation bar with "Navigate360 | STUDENT SUCCESS" and various icons. Below the navigation bar, there are several steps in a process: "Define Campaign" (checked), "Verify Recipients" (checked), "Select Staff" (highlighted with a blue box), "Compose Nudges" (locked), and "Verify & Start" (locked). The main content area is titled "Select Staff For Campaign". It features a section for "Available Staff" with a table that has columns for "ID", "NAME", and "AVAILABLE TIMES". A checkbox is located next to the first row in the table, and it is circled in red. To the right of the table, there is a checkbox labeled "Include Appointment Availabilities?" which is also checked. Below the table, there are "Back" and "Continue" buttons. The "Continue" button is circled in red. On the right side of the screen, there is a "Campaign Details" panel with the following information: Objective: Schedule Appointment(s) By Fri 03/21/2025; Recipients: 14; Staff: Pending...; Welcome Message: Pending Setup...; Campaign Ends: Fri 03/21/2025.

Set up an Appointment Campaign

19. Click **Add Welcome Message**.

20. *Optional: You can also create a **Success Message** to congratulate students for scheduling an appointment.*

DICKINSON COLLEGE

Navigate360 | STUDENT SUCCESS

Compose Nudges

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

[+ Add Welcome Message](#)

There are currently no nudges.

Success Message (Optional)

What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipient scheduling all campaign appointments. The success message is for communication purposes only and will not be included in campaign metrics.

[+ Add Success Message](#)

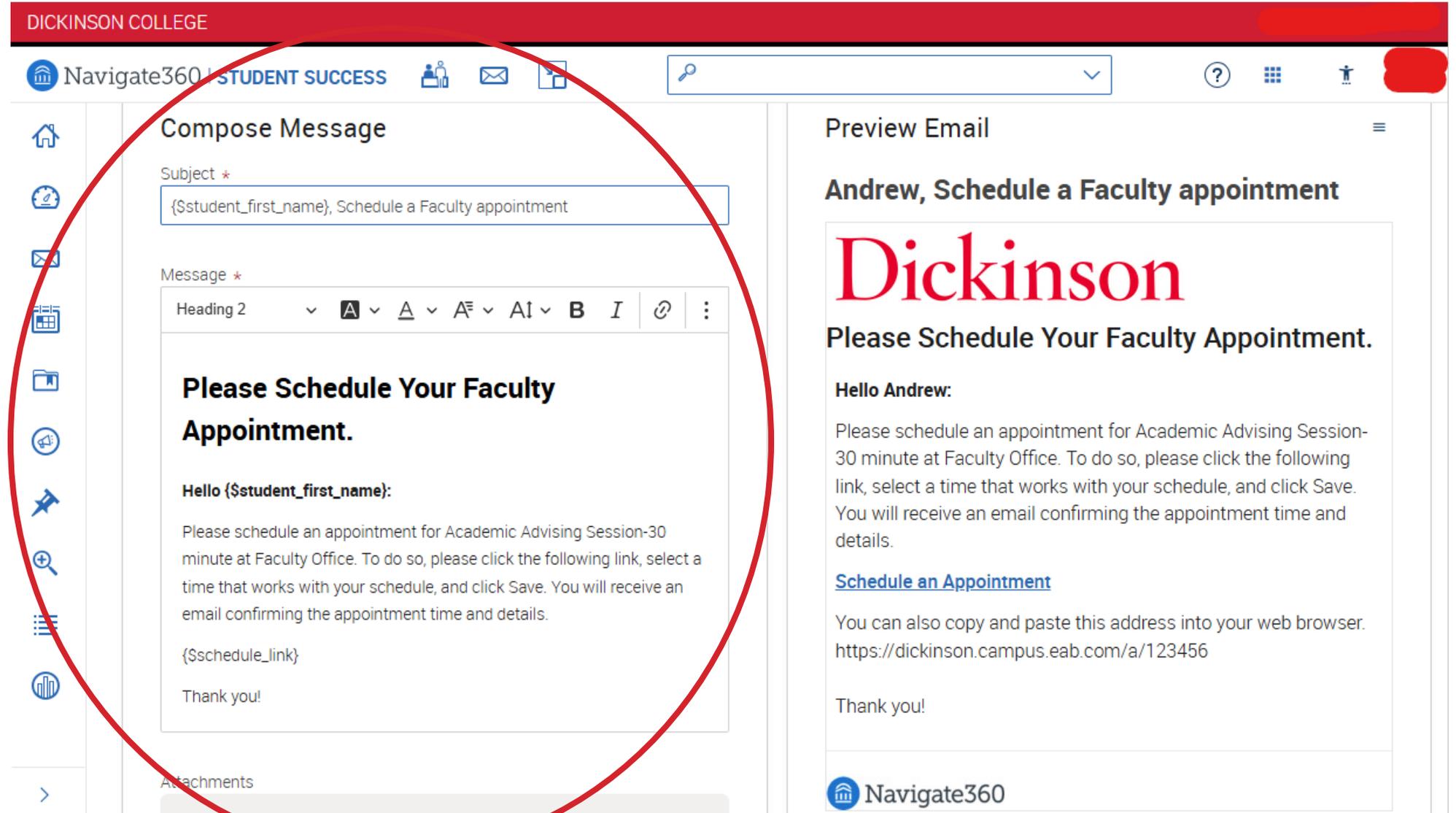
Campaign Details

- Objective: Schedule Appointment(s)**
By Fri 03/21/2025
- Recipients**
14
- Staff**
1
- Welcome Message**
Pending Setup...
- Campaign Ends**
Fri 03/21/2025

Set up an Appointment Campaign

21. Adjust your **Subject** and **Message** however you see fit. (Use the three dots to select merge tags if you like!) Check out a preview on the right side as you make edits.

22. Scroll down and click **Save Welcome Message** (not pictured).



DICKINSON COLLEGE

Navigate360 STUDENT SUCCESS

Compose Message

Subject *

{Sstudent_first_name}, Schedule a Faculty appointment

Message *

Heading 2

Please Schedule Your Faculty Appointment.

Hello {Sstudent_first_name}:

Please schedule an appointment for Academic Advising Session-30 minute at Faculty Office. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{Sschedule_link}

Thank you!

Preview Email

Andrew, Schedule a Faculty appointment

Dickinson

Please Schedule Your Faculty Appointment.

Hello Andrew:

Please schedule an appointment for Academic Advising Session-30 minute at Faculty Office. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser.
<https://dickinson.campus.eab.com/a/123456>

Thank you!

Navigate360

Set up an Appointment Campaign

23. Click **Add Nudge** to create a follow-up email that goes to students who have not scheduled an appointment.

Creating a nudge is almost identical to creating the Welcome Message. Just be sure to pick a nudge date at least a few days after your Welcome Message and then save it. Create multiple nudges if needed!

DICKINSON COLLEGE

Navigate360 | STUDENT SUCCESS

Compose Nudges

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ Add Nudge

Welcome Message

Send Date: 02/12/2025

Email Subject: {Sstudent_first_name}, Schedule a Faculty appointment

Email Message: Please schedule your Faculty appointment. Hell...

Success Message (Optional)

Campaign Details

- Objective:** Schedule Appointment(s)
By Fri 03/21/2025
- Recipients:** 14
- Staff:** 1
- Welcome Message:** Sent on day added
- Campaign Ends:** Fri 03/21/2025

Set up an Appointment Campaign

24. Once you're done creating nudges and your messages are saved, click **Continue**.

The screenshot shows the Dickinson College Navigate360 interface. At the top, there is a red header with "DICKINSON COLLEGE". Below it, the navigation bar includes "Navigate360 | STUDENT SUCCESS" and various icons. The main content area is titled "Email Message: Please schedule your Faculty appointment. Hell...". Below this, there is a section for "Success Message (Optional)" with a text area containing instructions: "What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipient scheduling all campaign appointments. The success message is for communication purposes only and will not be included in campaign metrics." There is a "+ Add Success Message" button and a message box stating "No success message specified for this campaign." At the bottom of the form, there are three buttons: "< Back", "Save and Exit", and "Continue >". The "Continue >" button is circled in red. A red arrow points from the text "click Continue" in the instruction to the "Continue >" button. The footer includes the EAB logo, links for "Privacy Policy", "Legal Disclaimer", "Terms of Use", and "Download Acrobat Reader", along with copyright information and a timestamp: "Page last refreshed at 4:38pm All times listed are in Eastern Time (US & Canada) Additional Modes".

Set up an Appointment Campaign

25. Double check all your settings. Click **Start Campaign!**

DICKINSON COLLEGE

Navigate360 | STUDENT SUCCESS

Reminders:

Section	Send Date	Subject	Email Preview
Recipients			View Recipients
Staff			View Staff
Welcome Message	Day added	{Sstudent_first_name}, Schedule a Faculty appointment	View Email
Specific Date Nudge	Wed 02/19/2025	{Sstudent_first_name}, Schedule a Faculty appointment	View Email

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

EAB | [Privacy Policy](#) | [Legal Disclaimer](#) | [Terms of Use](#) | [Download Acrobat Reader](#)

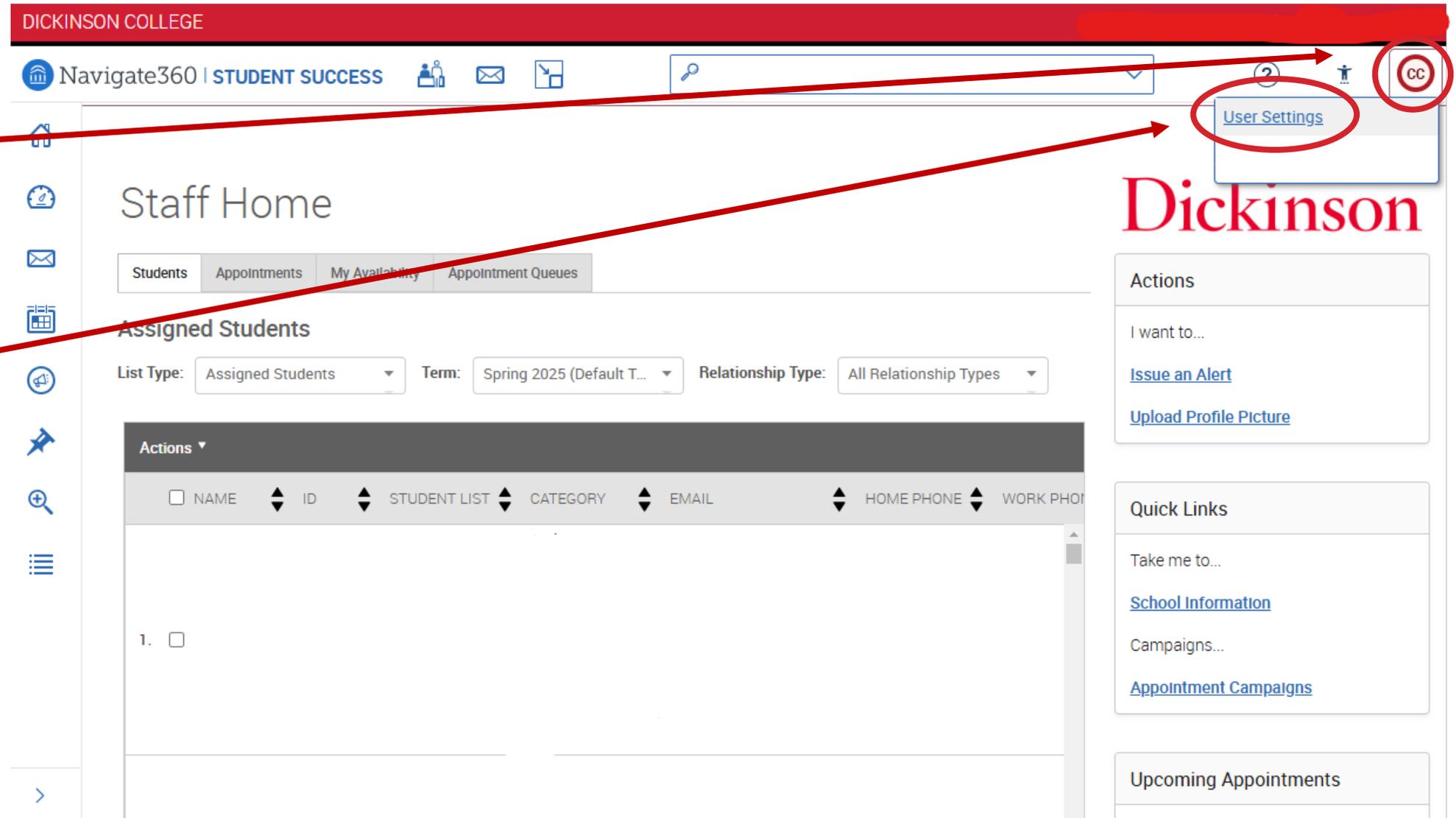
Page last refreshed at 4:40pm
All times listed are in Eastern Time (US & Canada) [Additional Modes](#)

Secondary Goals for Today (if we have time!)

- Adjust User Settings
- Set up your Email Signature
- Issue an Alert
- Report on an Appointment

Adjust User Settings

1. Click your initials in the top right corner.
2. Click **User Settings**.



Adjust User Settings

3. From here, you can adjust a number of your default settings including the **Semester**, **Landing Page**, **Homepage Tab**, **Student Profile Tab**, and **Care Unit**.

The screenshot shows the Dickinson College Navigate360 Student Success interface. The main content area is titled "Staff Home" and displays "Assigned Students" for the "Spring 2025 (Default T..." term. A "User Settings" overlay is open on the right side, showing the following settings:

- Default Views**
- Default Term: System Default Term
- Default Landing Page: System Default Landing Page
- Default Staff Home Tab: System Default Staff Home Tab (Assigned Students)
- Default Student Profile Tab: Select a Default Student Profile Tab
- Default Care Unit: None
- Personal Settings**

Set up your Email Signature

Further down in User settings, you can also set your **Email Signature** up here. Having an Email Signature will give you the option to add it into any future messages through Navigate as a **Merge Tag**.

The screenshot shows the Dickinson College Navigate360 interface. The top navigation bar includes the Dickinson College logo, the text "Navigate360 | STUDENT SUCCESS", and several utility icons. The main content area is titled "Staff Home" and contains tabs for "Students", "Appointments", "My Availability", and "Appointment Queues". Below these is a section for "Assigned Students" with a table that has columns for "NAME", "ID", "STUDENT LIST", "CATEGORY", and "EMAIL". A modal window titled "User Settings" is open on the right side of the screen. This modal contains a "Pronouns" dropdown menu set to "she/her/hers" and an "Email Signature" field. The "Email Signature" field includes a rich text editor toolbar with options for Paragraph, Bold (B), Italic (I), Link, Bulleted List, Numbered List, Indent, and Undo/Redo. A red circle highlights the "Email Signature" field, and a red arrow points from the text on the left to this field. At the bottom of the modal are "Save" and "Cancel" buttons.

Issue an Alert

1. Find the student of concern.
2. Click **Issue an Alert**.

DICKINSON COLLEGE

Navigate360 | STUDENT SUCCESS

Sophia

Overview | Success Progress | History | Courses | Path | More

Course Grade D/F	Repeated Courses	Withdrawn Courses	Missed Success Markers	Cumulative GPA

Total Credits Earned

Credit Completion % at this Institution

Overview

NA NA Dickinson	Student ID
	Classification First-Year
	Most Recent Enrollment

Options

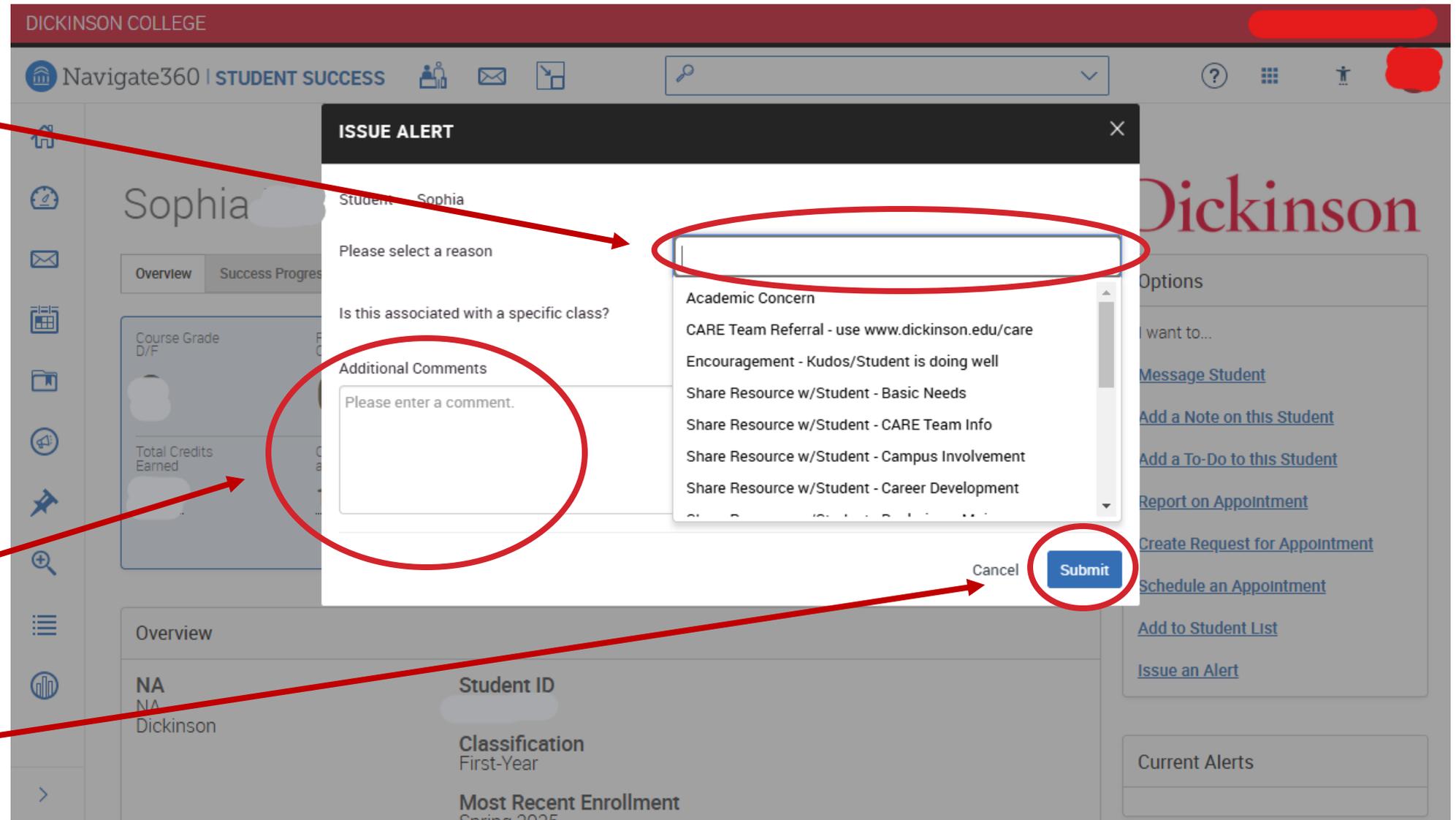
I want to...

- [Message Student](#)
- [Add a Note on this Student](#)
- [Add a To-Do to this Student](#)
- [Report on Appointment](#)
- [Create Request for Appointment](#)
- [Schedule an Appointment](#)
- [Add to Student List](#)
- [Issue an Alert](#)

Current Alerts

Issue an Alert

3. Select the **Alert Reason** from the dropdown menu.
4. If the issue is specific to one class, select it from the second dropdown menu.
5. Enter **Additional Comments**.
6. Click **Submit**.



Report on an Appointment

1. Return to the **Home** screen (if not already there).

2. Click the **Appointments** tab.

The screenshot shows the Dickinson College Staff Home interface. At the top, there is a red header with "DICKINSON COLLEGE" and a navigation bar with "Navigate360 | STUDENT SUCCESS" and various icons. A sidebar on the left contains a home icon (circled in red) and other navigation options. The main content area is titled "Staff Home" and has a tabbed interface with "Appointments" selected (circled in red). Below the tabs, there is a section for "Upcoming Appointments" with a "Care Unit" dropdown set to "All Care Units". A table lists upcoming appointments with columns for Actions, Date/Time, Attendee, Service, Comment, URL/Phone Number, Report Filed?, Details, and Pre Appt Questions. The table contains two rows of appointments. On the right side, there are sections for "Actions" (Issue an Alert, Upload Profile Picture), "Quick Links" (School Information, Appointment Campaigns), and "Upcoming Appointments".

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Staff Home

Students Appointments My Availability Appointment Queues

Upcoming Appointments

Care Unit: All Care Units

Actions	DATE/TIME	ATTENDEE	SERVICE	COMMENT	URL/PHONE NUMBER	REPORT FILED?	DETAILS	PRE APPT QUESTIONS
<input type="checkbox"/>	02/13/2025 3:15pm - 3:45pm ET	1/1	General Student Appointment-30 minute			Not Yet.	Details	N/A
<input type="checkbox"/>	02/14/2025 1:45pm - 2:15pm ET	1/1	Academic Advising Session-30 minute			Not Yet.	Details	N/A

Dickinson

Actions

I want to...

[Issue an Alert](#)

[Upload Profile Picture](#)

Quick Links

Take me to...

[School Information](#)

Campaigns...

[Appointment Campaigns](#)

Upcoming Appointments

Report on an Appointment

3. Click the checkbox next to the appointment you want to report on.

4. Under Recent Appointments, click **Actions** and then **Add Appointment Summary**.

*Note: To indicate a missed appointment, select **Mark No-Show** instead.*

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Recent Appointments

Care Unit: All Care Units

	APPT DATE	SERVICE	COURSE	COMMENT	ATTENDEE	REPOP FILED?	DETAILS	PRE APPT QUESTIONS
<input checked="" type="checkbox"/>	02/14/2025 11:15am - 11:45am ET (30m)	Academic Advising Session-30 minute	N/A			Not Yet.	Details	N/A
<input type="checkbox"/>	02/13/2025 10:30am - 11:00am ET (30m)	General Student Appointment-30 minute	N/A			Not Yet.	Details	N/A
<input type="checkbox"/>	02/11/2025 1:00pm - 1:30pm ET (30m)	Academic Advising Session-30 minute	N/A			Not Yet.	Details	N/A
<input type="checkbox"/>	02/10/2025 3:00pm - 3:30pm ET (30m)	Academic Advising Session-30 minute	N/A			Not Yet.	Details	N/A
<input type="checkbox"/>	02/10/2025 1:30pm - 2:00pm	General Student	N/A			Not Yet.	Details	N/A

Academic Advising Session-30 minute
minute With
(she/her/hers) 02/14/2025 1:45pm ET

Report on an Appointment

5. Include whatever notes you will find helpful for future use. Many areas will fill in automatically from the original appointment, and other areas are all optional. **Appointment Summary** will likely be the most helpful for yourself.
6. Click **Save this Report** at the bottom (*not pictured*).

The screenshot shows a mobile application interface for reporting on an appointment. The form is titled "Appointment Details" and includes the following fields:

- Appointment Details:** Academic Advising Session-30 minute, 02/13/2025 11:15am - 11:45am ET.
- Care Unit:** Faculty (dropdown menu).
- Location:** Faculty Office (dropdown menu).
- Service:** ACADEMIC ADVISING SESSION-30 MINUTE (dropdown menu with a close button).
- Course:** Start typing to search all courses (dropdown menu).
- Meeting Type:** Select Meeting Type (dropdown menu).
- Date of visit:** 02/13/2025.
- Meeting Start Time:** 11:15am to **Meeting End Time:** 11:45am.

The "Summary Details For" section includes four dropdown menus:

- Assignments Discussed
- Objectives of the Session
- Study Skills Used
- Goals for Next Session

Below these are five questions with radio button options (Yes, No, N/A):

- Student arrived on time and was ready to begin our session.
- Student was prepared (attended class, read lesson, had notes, etc.)?
- Student asked for explanation of material not understood?
- Student responded positively to instruction (as you suggested)?
- Student was aware of future assignments?
- Student shows a better understanding of the material since our last session.

The "Appointment Summary" section features a rich text editor with a toolbar containing options for Paragraph, Bold (B), Italic (I), Link, Bulleted List, Numbered List, and Undo/Redo.

Keep Learning!

Go to www.dickinson.edu/navigate for more resources!

