

## Introduction to CCNY Navigate for Advisors

### CCNY Navigate Sites:

- **Production:** This is our “live” site.
  - The data from CUNYFirst is updated once daily. This includes student data and user access/roles.
- **Training:** This is our sandbox where we test new configurations and conduct training. No actions on this site will send any communication to students, faculty, or staff. This is a safe place to try out all features.
  - Student data and user information is not updated regularly. We request that the site be updated periodically. Usually at the beginning and end of each semester. We also request an update when we add new users so that they will have access to the training site. The training site is visually differentiated from the live site by the bright orange banner at the top of each page. On the production site, the banner is gray.

### Access:

Users use the CUNY credentials to access either of the sites using the links below:

- **Production Site:** <https://ccny-cuny.campus.eab.com>
- **Training Site:** <https://ccny-cuny.campus-training3.eab.com>

### Navigate Help Center:

EAB provides a robust help center from within the Navigate platform. It is accessible from either the production site or the training site. Simply click on the “?” in the upper right-hand corner of the page and then click on the “Help Center” Link. (See image below)

The help center has articles, videos, and toolkits for all features in Navigate. Through this document we will provide links to resources in the help center for the feature we are discussing. For these links to work, you need to have the Help Center open prior to clicking on the link. The first such link is a video about the help center itself: <https://helpcenter.eab.com/hc/en-us/articles/1500003172381-Help-Center-Overview-Video>

CUNY - THE CITY COLLEGE OF NEW YORK

NAVIGATE Quick Search

Staff Home

Students Appointments My Availability Appointment Queues Appointment Requests

Assigned Students

List Type: Assigned Students Term: 2022 Fall (Default Ter... Relationship Type: All Relationship Types

Actions

NAME	ID	STUDENT LIST	CUMULATIVE GPA	CATEGORY	MAJOR	ENRO
No matching records found						

Previous Next

You have no upcoming appointments.

Resources & Support

Help Center & Support Links

- Help Center
- Idea Portal
- Community
- Status Page
- EAB.com

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Page last refreshed at 2:42pm  
All times listed are in Eastern Time (US & Canada) Additional Modes

## Staff Homepage:

This is the landing page for most users is the staff home page. There are separate home pages for students and professors. Users with multiple roles in Navigate (Professor, Advisor, Student, etc.) will have multiple home pages.

The icons on the left-hand side of the page allow the user to access many of the key features on Navigate. When you hover your mouse over each icon, the title will display. In the sections below we will introduce the features behind each icon in order from top to bottom. Each entry will include links to the appropriate Help Center Articles. <https://helpcenter.eab.com/hc/en-us/articles/360010274814-Staff-Home>

1. **Dashboard:** The staff dashboard is designed to give you at-a-glance, actionable information about students who are assigned to you and an overview of ongoing or recent activity. <https://helpcenter.eab.com/hc/en-us/articles/1500008665181-My-Dashboard>
2. **Conversations:** This page displays all communications the user has sent or received through navigate. <https://helpcenter.eab.com/hc/en-us/articles/360010442254-Conversations>

3. **Calendar:** The navigate calendar will show a user's scheduled appointments, class (for both faculty and students), events and busy times. These "busy times" are events in a user's linked personal calendar. <https://helpcenter.eab.com/hc/en-us/articles/360014084874-Calendar>  
<https://helpcenter.eab.com/hc/en-us/articles/360014494694>
4. **Cases:** Certain Notifications can be configured to open a case file so that a particular staff member can coordinate the resolution of the issue that triggered the alert.
  - a. Cases: <https://helpcenter.eab.com/hc/en-us/articles/360014177373-Cases>
  - b. Notifications (Alerts): <https://helpcenter.eab.com/hc/en-us/articles/360014178053-Alerts>
5. **Campaigns:** Campaigns are a wonderful way to reach a specific group of students to ask them to complete a specific action item. Different users will have access to different campaigns based on the Navigate Roles they have been assigned. There are four main types of campaigns:
  - a. Appointment Campaigns: <https://helpcenter.eab.com/hc/en-us/articles/360011092253-Campaigns-Appointment-Campaigns>
  - b. Email Campaigns: <https://helpcenter.eab.com/hc/en-us/articles/5700550933399-Campaigns-Email-Campaign>
  - c. Enrollment Campaigns: <https://helpcenter.eab.com/hc/en-us/articles/4407069637527-Campaigns-Enrollment-Campaigns>
6. **To-Do's:** To-dos allow staff members to create a reminder for themselves regarding a particular student. To-Dos can also be configured to display to the student in the Navigate Student mobile app. <https://helpcenter.eab.com/hc/en-us/articles/360014186553-To-Dos-Staff-Platform->
7. **Advanced Search:** One of the most useful features in Navigate is Advanced Search. From the home page, click on the icon of the magnifying glass with a plus sign. The very extensive choice of search parameters allows the user to identify broad or very narrowly defined groups of students. These search results can be used to contact students by email or text message, create student lists, apply alerts en masse, add students to an appointment campaign and other useful actions. A very important feature is the ability to save a search that you would use regularly. These saved searches are accessible via the icon below the Advanced Search icon "Lists and Saved Items." <https://helpcenter.eab.com/hc/en-us/articles/360014175873-Advanced-Search>
8. **Lists and Saved Items:**
  - a. Student Lists: <https://helpcenter.eab.com/hc/en-us/articles/360014185453-Student-Lists>
  - b. Saved Searches: <https://helpcenter.eab.com/hc/en-us/articles/360014109434-Saved-Searches>

c. Saved Reports: <https://helpcenter.eab.com/hc/en-us/articles/360042530013-Reports>

9. **Reporting:** The reporting page provides users with a variety of useful reports. Which reports users have access to will vary by the Navigate role or roles they have been assigned. <https://helpcenter.eab.com/hc/en-us/articles/360042530013-Reports>