EAB

Student Success Collaborative
MavCONNECT

Quick Start Guide for MavCONNECT 2.0 by Navigate   MNSU, July 2023

All ROLES

GETTING STARTED

1. **Log in to MavCONNECT** using your SSO credentials! Once logged in, **open the Help Center** (click "?" in upper right, then *Help Center...*, *Help Center*), and then the hotlinks below will take you directly to the **Help Center** with How-to steps, videos, and best practices. (If you have issues with getting to the help center, let us know at mavconnect@mnsu.edu or via the MavCONNECT 2.0 Teams chat.)

Training site URL: https://mnsu.campus-training3.eab.com/ - is available NOW for training/practice (please practice setting up your availability, etc.) Do NOT sync your calendar in the training site.

Starting JUNE 1 – Explore the **production** site. Please sync your calendar, create availability, and search and save lists, etc. NOTE:
- The site is LIVE but has NOT been widely shared out to students or others.
- Actions completed in the production site are REAL (emails will be sent, etc.) Use *training* for practice.
- Student notes and other history items from MavCONNECT 1.0 ARE being transferred into the production site, but not the training site.
- Both Training and Production sites are still in process of being built; features and options will change.

PRODUCTION SITE URL: https://mnsu.campus.eab.com/ – **Aug. 1st** target date for exclusive usage

2. **Configure Availability and Calendar for Appointment Scheduling** (as needed) If you are NOT holding appointments with students you do NOT need to set up Availability.

- **Set Up Your Availability** - If you will be meeting with Students, 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 B* for detailed instructions on setting up your Availability.

- **Sync Your Calendar** – If you do not currently have Calendar Sync, and do not plan to schedule appointments with students, you likely don't need to do this. This initiates the two-way sync between Navigate and your calendar. *See Appendix C* for detailed instructions. **(Sync available in the Production Site Only).** If you do not currently have Calendar Sync capabilities but will be scheduling appts, email mavconnect@mnsu.edu and ask for Calendar Sync.

KEY PLATFORM FEATURES

Perform These Key Actions to Identify, Communicate With, and Support Students
- **Search and Find Students using Quick Search and Advanced Search**
- **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
- **View Staff Availability and Schedule Appointments two different ways, and understand the differences of each:**
    - **From the Student Profile Page** *(Appendix A)*
    - **From the Appointment Center**
- **Create General Events for others** – General Events are a way to block time on your or another staff's calendar so that they show as "not available" for unexpected times away from the office.
- **Add Appointment Summary Reports or Notes (as necessary/directed by your Advising Center Director)**– Record your interactions and follow-ups from student meetings by adding an Appointment Summary Report (record associated with an appointment) or a Note (general record not associated with a specific meeting)
- **Check Students in Via a Kiosk** (coming in fall)

Need Help? Access our MavCONNECT Website

Visit www.mnsu.edu/mavconnect for articles, quick guides, videos, and how-to instructions on all MavCONNECT Features and Workflows.

Still stuck? Email mavconnect@mnsu.edu or check out our vendor's help center for further assistance.
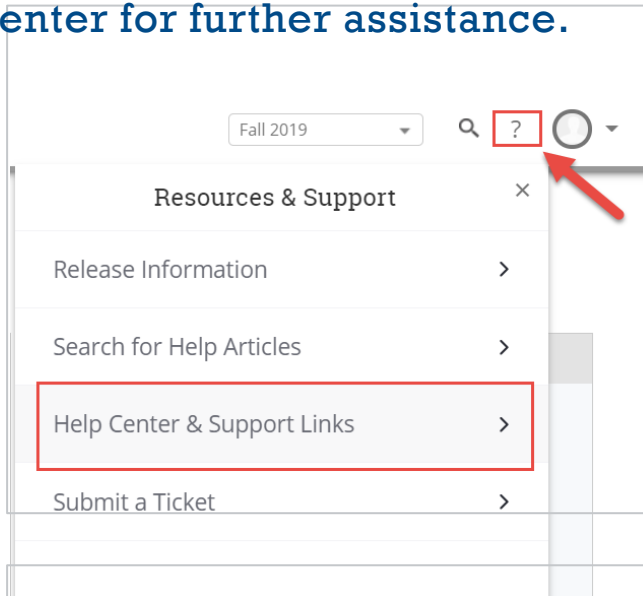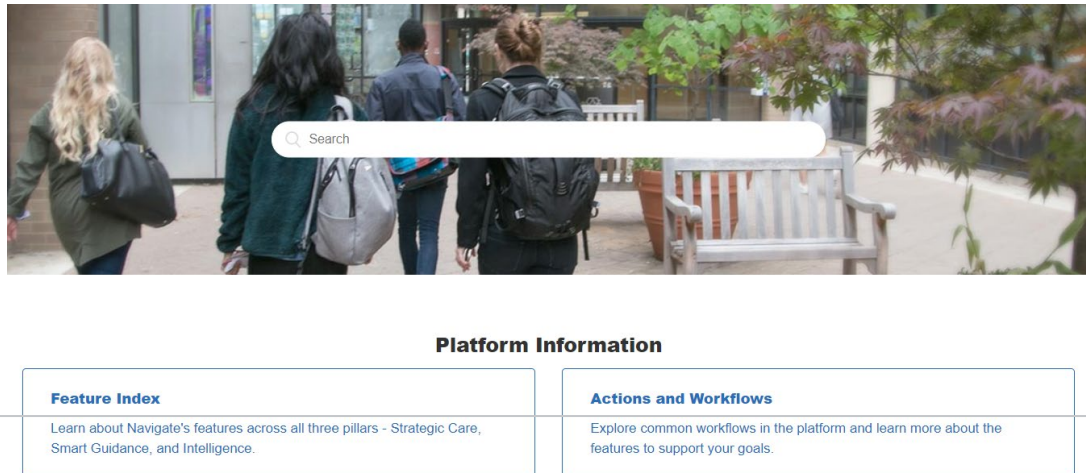
Accessing the Help Center -

Step 1: Log in to MavCONNECT

Step 2: Click on the question mark icon in the top right hand corner.

Step 3: Click Help Center & Support Links from the drop down menu

Step 4: Select Help Center to be taken to articles and step by step instructions for MavCONNECT features and workflows. View the Help Center Overview Video to get the most from its resources!

Resources & Support ×

Release Information 〉

Search for Help Articles 〉

Help Center & Support Links 〉

Submit a Ticket 〉

Search

Platform Information

Feature Index
Learn about Navigate's features across all three pillars - Strategic Care, Smart Guidance, and Intelligence.

Actions and Workflows
Explore common workflows in the platform and learn more about the features to support your goals.

Tip:
Links to feature-specific articles in the Help Center are found at the bottom of each page of this document (look for this icon)

? **For more detailed guidance, check out the Help Center!**

Additional Questions? Email mavconnect@mnsu.edu for support!

Appendix A: Setting Up Your Availability

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 institution administrators.

Staff Home _New_

| Students | Upcoming Appointments | My Availability |

Available Times ⓘ

Actions ▾						
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT
○	Mon, Tue, Wed	8:00a-5:00p	Forever	My Advisor's Office	Changes to my Schedule For: Appointments/Drop-Ins/Campaigns	Advising	Edit

MODIFY AVAILABILITY ✕

Forever ▾

Add to your personal availability link?

☑ Add this availability to your personal availability link?

What type of availability is this?

| Appointments | Drop-ins | Campaigns |

Meeting Preference

| ✕ In-Person | ✕ Virtual Meeting |

Care Unit

| Advising ▾ |

Location

| Academic Advising Center ▾ |

Services

| ✕ Academic Planning | ✕ Changing a Major | ✕ General Advising |

URL / Phone Number

Special Instructions for Student

B _I_ :≡ ≟≡ ↶ ↷

Cancel **Save**

Add Time -

Step 1: Click the Add Time button in the Actions Menu

Step 2: Select the days as well as start and end time in the _From_ and _To_ fields.

Step 3: Set the length of the availability with the _How Long Is this Availability Active?_ field.

Step 4: If you want this availability added to your personal availability link, select _Add This Availability to Your Personal Availability Link?_ You can put the personal availability link in an email or text or on a website. Students are taken to a scheduling workflow that has the staff/faculty's chosen availabilities pre-filled. (**Note**: Personality Availability Link only works for regular Appointments, not for Drop-in's and Campaigns)

Step 5: Select your Availability types. You can choose more than one at a time. For example, an availability can be for both Drop-In and Appointments.   WE RECOMMEND you separate Appointments and Drop-in times into different availability blocks as it will provide more accurate "Drop-In Availability" from the student view.

Step 6: For Meeting Preference, select the applicable meeting modality.

Step 7: For Care Unit, select the Unit relevant to you (i.e. for Professional Academic Advisor => Professional Academic Advisor, etc.)

Step 8: Choose the location where you will be available.

Step 9: Select services you can provide students during this availability. You must choose at least one service but can pick more.

Steps 10-14 continued on next page...

Appendix A: Setting Up Your Availability

URL / Phone Number

Special Instructions for Student

B *I* :≡ :≡ ↩ ↪

e.g. room 23, please bring paper

Will you be meeting with multiple students?

These settings will not be used for kiosk and campaign purposes.

Max Number of Students per Appointment

`1`

Cancel   **Save**

Step 10: In the *URL / Phone Number* field, add your meeting link for your appointments or your phone number as desired. Can be left blank.

Step 11: Use the *Special Instructions* box to include additional details for students. *(Example: For zoom appointments please use the following link: XXXXXX. For in-person appointments, please come to the XXXX Advising Center and check in at the front desk. OR We will use Zoom for our meeting, which you can access by using the link provided. Virtual meeting spaces allow us the flexibility to connect from various spaces. Please ensure the space you are in is conducive for such a meeting. I very much look forward to meeting with you!)*

Step 12: If you want to hold group appointments, you can specify the number *under Max Number of Students per Appointment.* Otherwise, you can leave is as 1 for one-on-one appointments.

Step 13: Click the Save button.

Step 14: Repeat this process until all your availabilities have been defined.

- You can have as much availability as needed.
- Creating multiple availabilities will enable you to set aside specific blocks for specific services (registration advising for example) or meeting types (drop ins vs. scheduled appointments)

Editing Availability:

Copy Time - to copy a time, select the time you would like to copy and then click the Copy Time button. The availabilities will be copied, and a dialog will open allowing you to make edits or to save your newly created availability.

Delete Time- to delete your time, simply select the time and click the Delete Time button.

Group Appointments - You can create availability for group appointments by indicating how many students are able to schedule into the same appointment (indicate specific number under "Max Number of Students per Appointment")

Inactive availabilities are highlighted in red in the Times Available grid.

For more detailed guidance, check out the Help Center!

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Appendix A: Setting Up Your Availability & Target Hours

Target Hours allow staff to restrict the number of hours in which they can be scheduled for appointments via Student Scheduler.

- Staff set their Target Hours in the **Scheduling Target Hours** section.

- Target Hours have two aspects:

    1. ***Target Hours Per Week:*** This is the maximum number of hours per week in which they can be scheduled for an appointment. (You can set this between 1-168 hours.)

    2. ***Block scheduling for the week when target is hit:*** If selected (and hours have been reached), the staff member will no longer be available to students for appointments for the remainder of the week.

- **Note:** Target Hours are calculated against all Services, Locations, and Care Units. Your Leadership Team will provide clarification on how this feature should be used.

Appendix B: Scheduling appointments for Others

NAVIGATE

Help Center > Platform Information > Actions and Workflows

Search

Scheduling Appointments for Staff or Faculty

Help Center Manager
1 month ago · Updated

Follow

Intro: Scheduling appointments is a critical Navigate functionality. This guide explains how to schedule an appointment for individual students if you are a staff or faculty member. It also explains how to create a General Event in Navigate. If you are trying to create an appointment campaign for multiple students, please see this guide to launching an Appointment Campaign.

Table of Contents

- Scheduling Appointments as Staff or Faculty
- Scheduling General Events
- Frequently Asked Questions
- Related Articles

Scheduling Appointments as Staff or Faculty

This section explains how to create an appointment with an individual student.

1. Open a student profile.
2. Select **Schedule an Appointment** from the sidebar.

Appendix B: Scheduling appointments for Others

Staff Alerts 0

I want to...

Message Student

Add a Note on this Student

Add a Reminder to this Student

Report on Appointment

Create Request for Appointment

Schedule an Appointment

Add to Student List

Issue an Alert

3. The **Schedule Appointment** page opens.

4. Select the Care Unit, Location, and Service from the filter panel. If the service requires a course or your appointment is course-related, select the Course as well. After that, select Meeting Type

Appendix B: Scheduling appointments for Others

from the filter.

Filters

Care Unit

Advising Athletes ▾

Location

Student Support Center ▾

Service

Eligibility Questions ▾

Course

🔍

Meeting Type

Virtual ▾

Comments

5. Select the organizer for the appointment. This is most likely you, but if you have the ability to schedule for others, you see other potential organizers. After selecting an organizer, a grid showing available dates and times appears. The grid will show all possible appointments based on the availabilities for the Service in the week that corresponds to the date selected in the **Select a Date** calendar in the filters section.

Appendix B: Scheduling appointments for Others

Choose A Time To Meet

Length: 30 min ▾

Availabilities: ?   Show All Availabilities ▾

TIME SLOT	05/02 (SUN)	05/03 (MON)	05/04 (TUE)	05/05 (WED)	05/06 (THU)	05/07 (FRI)	05/08 (SAT)
8:00am - 8:30am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
8:30am - 9:00am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
9:00am - 9:30am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
9:30am - 10:00am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
10:00am - 10:30am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
10:30am - 11:00am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
11:00am - 11:30am ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
11:30am - 12:00pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
12:00pm - 12:30pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
12:30pm - 1:00pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
1:00pm - 1:30pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
1:30pm - 2:00pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	
2:00pm - 2:30pm ET		DROP-IN	DROP-IN	DROP-IN	DROP-IN	DROP-IN	

If you do not choose an appointment length, it will default to 30 minutes. You can also adjust the availabilities shown on the grid by choosing a different option from the **Availabilities** drop-down menu. Note that if you unlock non-available or conflicted times, this may cause schedule conflicts for you.

Availabilities: ?

Show All Availabilities ▾

- Show Availabilities for This Course/Service
- Show All Availabilities
- Unlock Non-Available Times
- Unlock Times With Conflicts

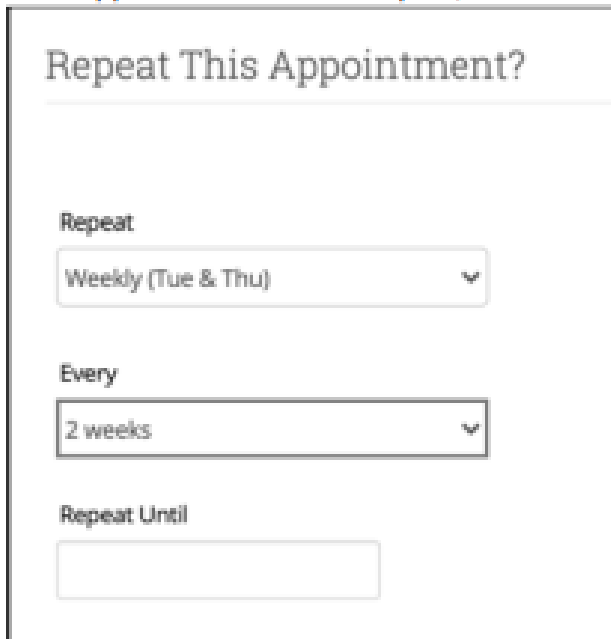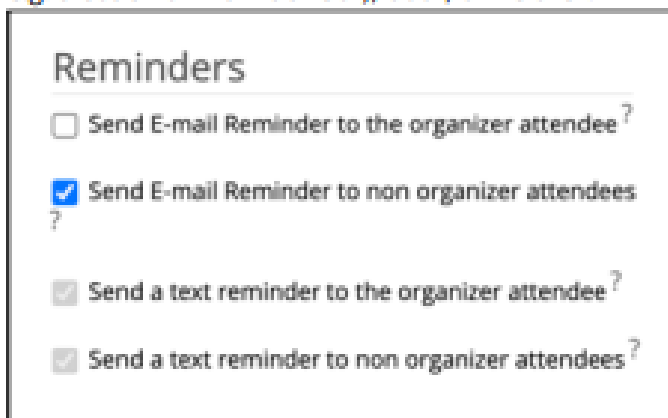| 05/06 (THU)	0! (
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Appendix B: Scheduling appointments for Others

6. If the appointment needs to repeat, choose the frequency of repetition from the **Repeat** menu.

Repeat This Appointment?

Repeat

Weekly (Tue & Thu)   ⌄

Every

2 weeks   ⌄

Repeat Until

7. Select what reminders need to be sent to who from the Reminders section of the filters. You can send either email or text reminders to the organizer of the appointment, the non-organizers (the attendees and any student support staff who is informed when the student has an appointment, e.g. a coach or main advisor), both, or neither.

Reminders

☐ Send E-mail Reminder to the organizer attendee [?]

☑ Send E-mail Reminder to non organizer attendees [?]

☐ Send a text reminder to the organizer attendee [?]

☐ Send a text reminder to non organizer attendees [?]

8. Once you have set the appointment details, click **Save Appointment** to create the appointment. It is added to the organizer's calendar and a notice is sent to the student's email from Navigate.
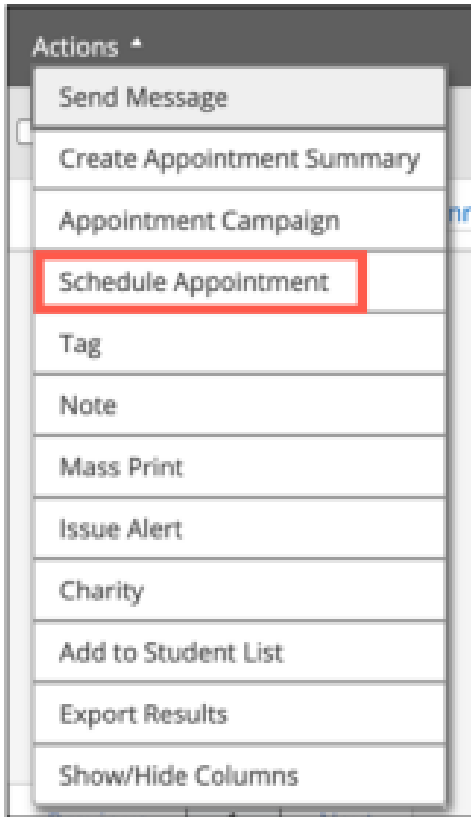
You can also access the **Schedule Appointment** page from other locations in Navigate Staff. It is available from Staff Home in the Actions Menu for your assigned students.

Appendix B: Scheduling appointments for Others

Schedule Appointment also appears in the Actions Menu for Student Lists, Advanced Search, Professor Home, the Calendar (as **Add Calendar Event)** and some Navigate Reports. Selecting it takes you to the Schedule Appointment page. Follow the procedure at the top of this section to create an appointment.
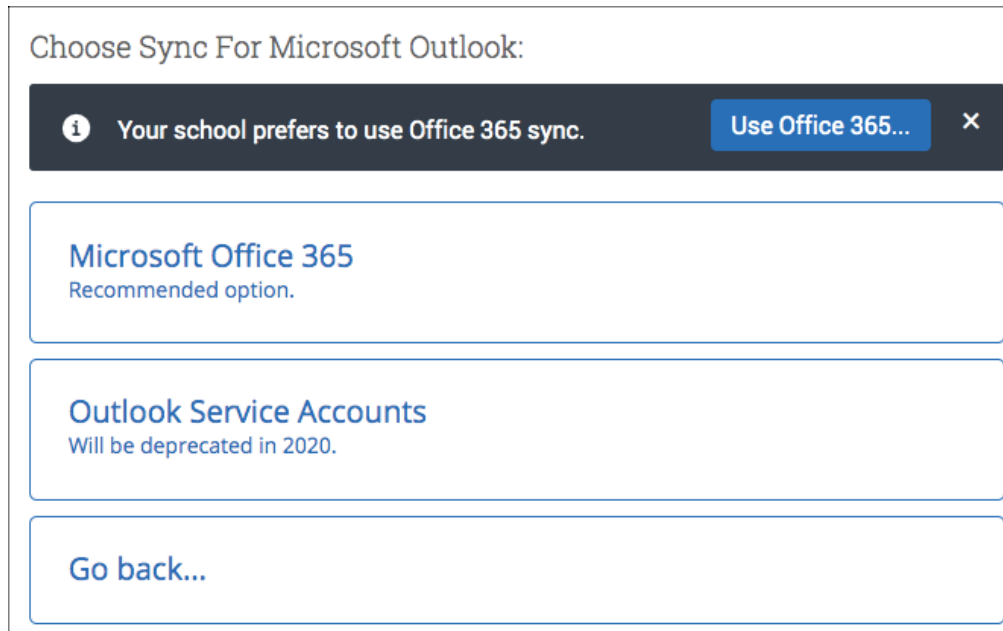
Appendix C: Sync Your Outlook Calendar

Integrating Your Calendar

The availability you set up within MavCONNECT dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the MavCONNECT platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in MavCONNECT to your personal calendar.

> ## PLEASE ONLY SYNC YOUR CALENDAR IN THE PRODUCTION SITE

1. Toggle to the calendar page within MavCONNECT using the calendar icon on the left side toolbar.

2. Select Settings and Sync on the top right side of the page

3. Click Setup Sync. You will see a "Use Office 365 sync" banner on Calendar with a "Use Office 365…" button to begin the setup.

Choose Sync For Microsoft Outlook:

> ⓘ Your school prefers to use Office 365 sync.   Use Office 365...   ✕

Microsoft Office 365
Recommended option.

Outlook Service Accounts
Will be deprecated in 2020.

Go back...

4. Upon clicking the button, you will be routed to login.microsoftonline.com. If the you are not already signed into Office 365, you will be prompted to sign in.

5. After signing in, Office 365 will ask you to grant permission for the application to access your calendar. Pressing "Accept" will authorize and begin the syncing.

Microsoft Office 365:
eab_st_o365_2@eabdev.onmicrosoft.com

Retry Sync...

Disconnect Sync...
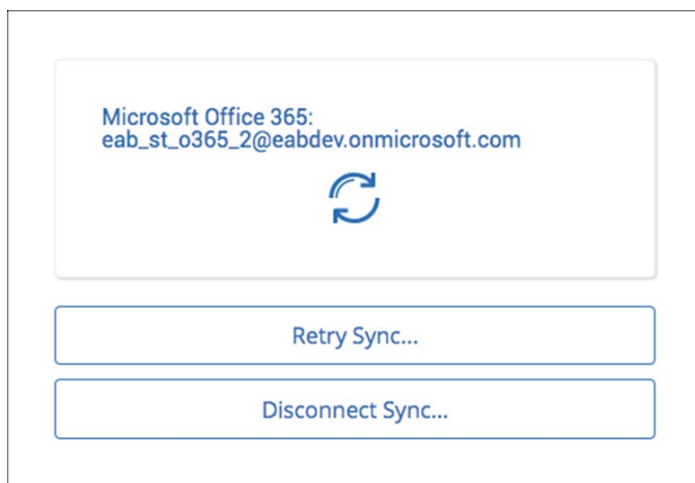
The browser will return to the Calendar Integrations page. The "Exchange Integration" tab will no longer appear. The "Office365 Integration" tab will now show the timestamp for the last successful sync (or any applicable error message) and will include options for you to Retry or Disconnect the sync as needed.

The Two-Way Sync will enable that any agenda item created from MavCONNECT will sync back to your Outlook Calendar. All existing events and events that are created from your Outlook Calendar will be shown as 'Busy' in MavCONNECT

? **For more detailed guidance, check out the Help Center!**

Appendix C: Sync Your Outlook Calendar
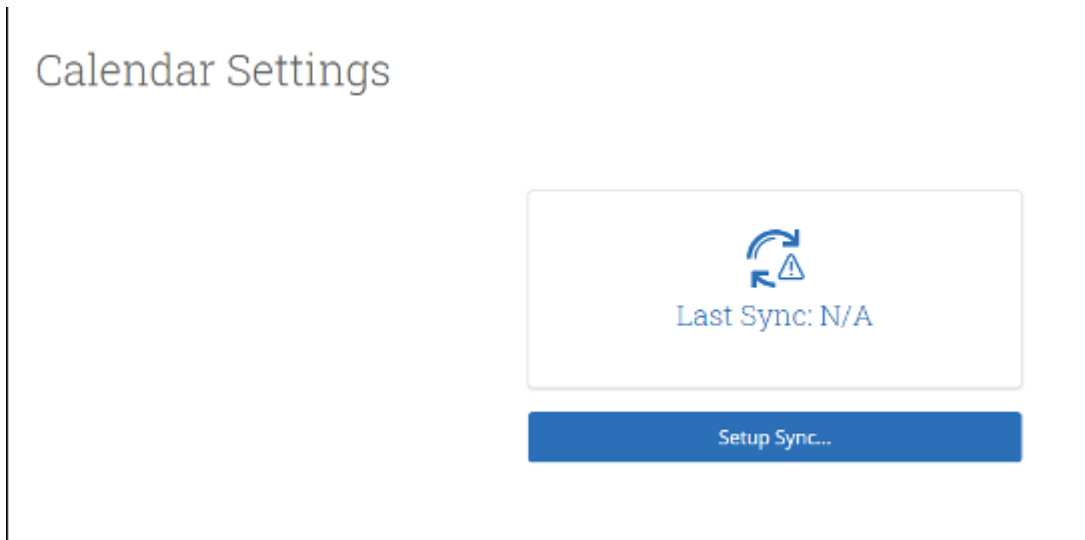
Integrating Your Calendar

The availability you set up within MavCONNECT dictates students' ability to schedule appointments with you. You have the added option to integrate your calendar with the MavCONNECT platform to pull in Free/Busy times from your personal calendar and push appointments scheduled in MavCONNECT to your personal calendar.

PLEASE ONLY SYNC YOUR CALENDAR IN THE PRODUCTION SITE

Select the calendar icon in the left navigation bar. Once on the My Calendar page, select the **Settings and Sync** button.
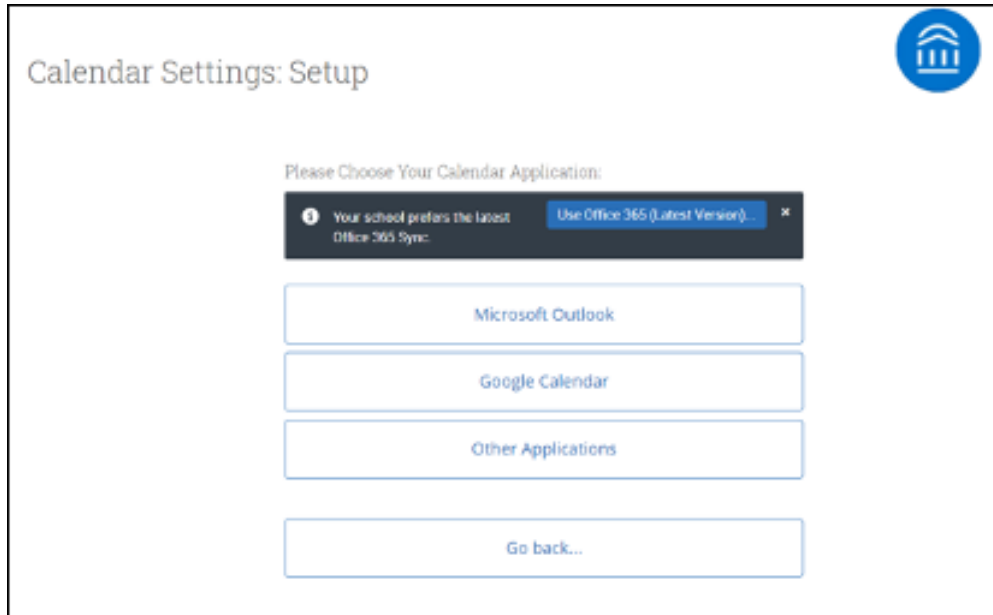

On the Calendar Settings page, select **Setup Sync...**

Integrating Your Calendar

If you see the following screen, click the button that says **Use Office365 (Latest Version)** at the top of the list of options, as in figure 3.

Calendar Settings: Setup

Please Choose Your Calendar Application:

Your school prefers the latest Office 365 Sync.   Use Office 365 (Latest Version)...   ✕

Microsoft Outlook

Google Calendar

Other Applications

Go back...

If you click **Microsoft Outlook** instead of the **Use Office365 (Latest Version)** button, you choose your Microsoft Outlook sync. Select **Microsoft Office 365 (Latest Version)** from the options.

Calendar Settings: Setup

Choose Sync For Microsoft Outlook:

Microsoft Office 365 (Latest Version)

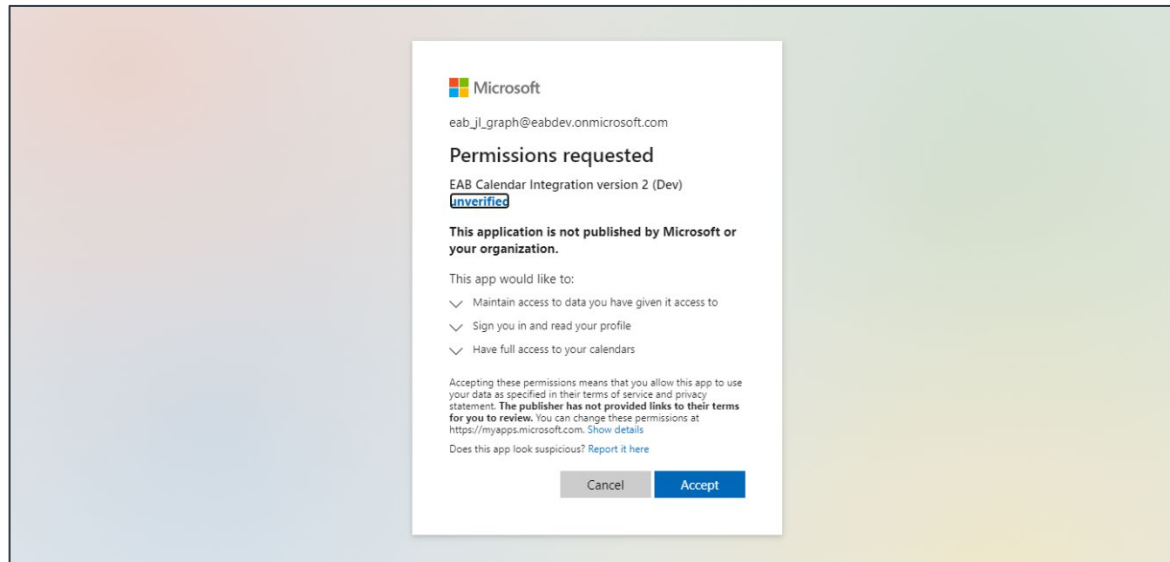Microsoft Office 365 (Previous Version)

Go back...
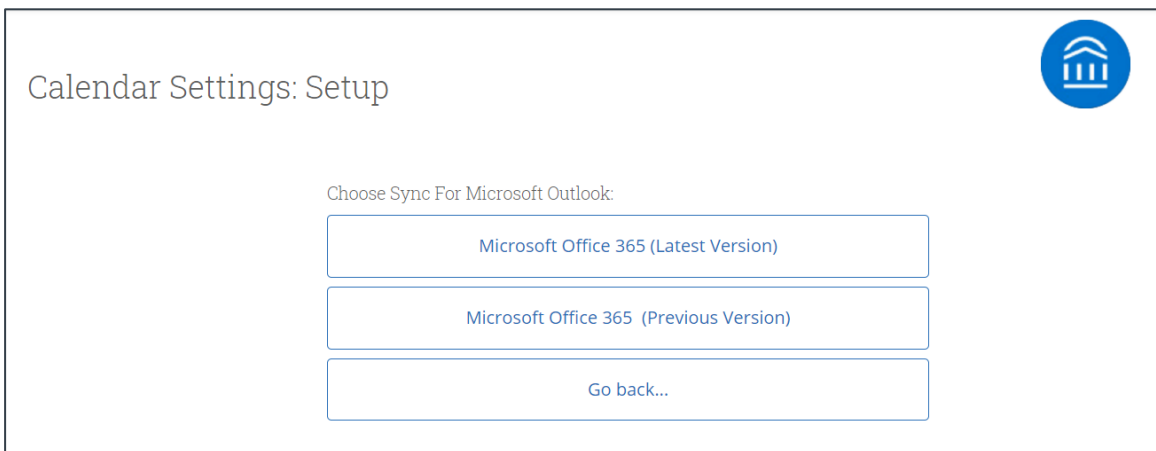
Regardless of which method you choose, the Microsoft login and authorization page opens. The page tells you to pick an account. Choose your professional account.

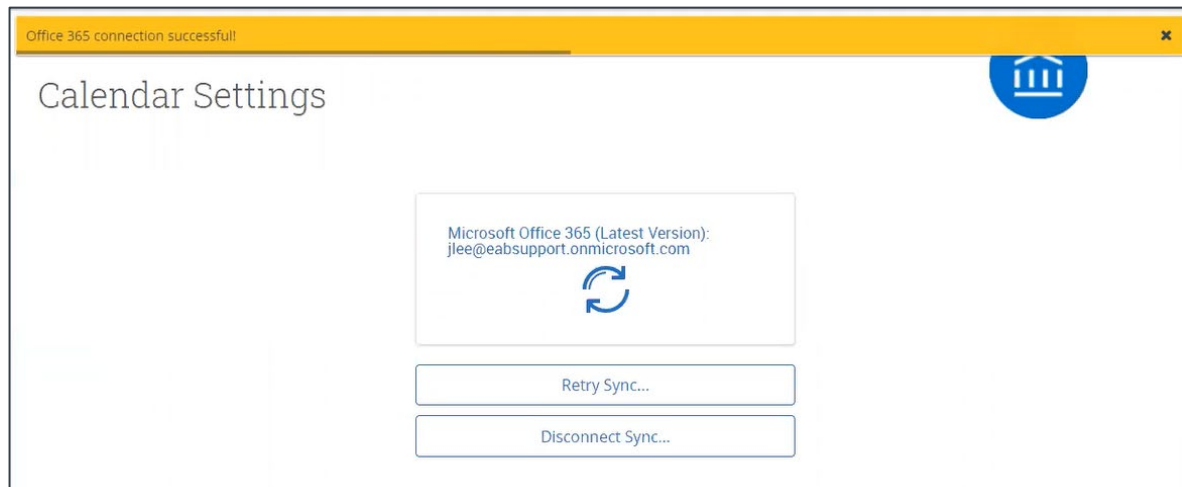# Appendix C: Sync Your Outlook Calendar PRODUCTION ONLY

Integrating Your Calendar
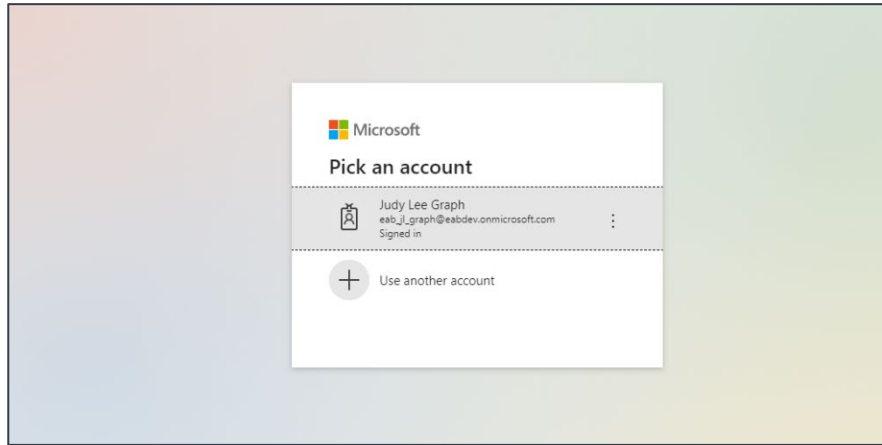
If you log in successfully, you see a page requesting permissions.

Select **Accept**. The page redirects to the MavCONNECT Calendar Settings page, with a success message and information about the sync on display.
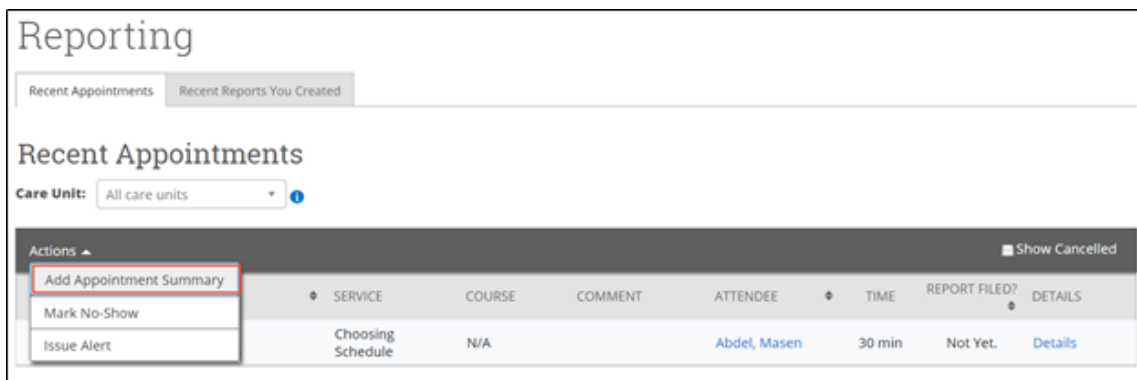
Appendix D: Add Appointment Summary Reports

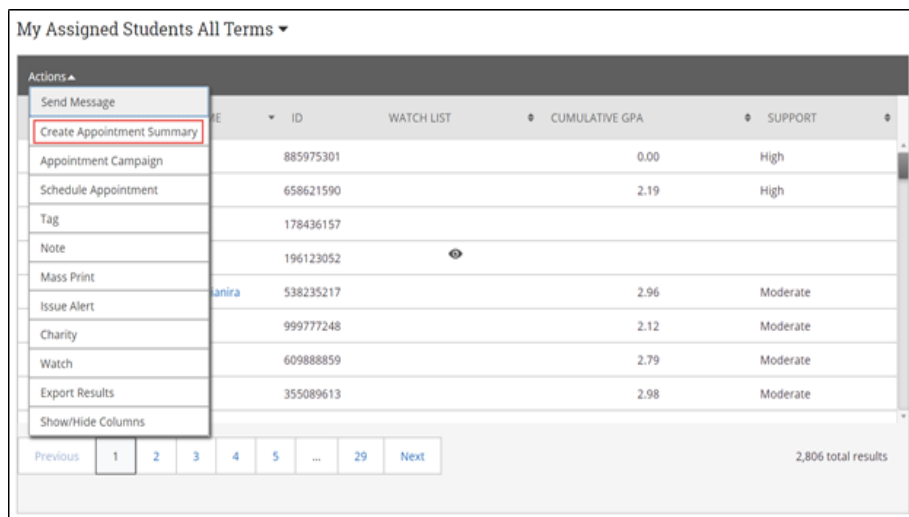## Documenting a Student Interaction

Summary Reports can be created during or after meeting with students. You can add a summary report to an appointment scheduled in advance, create a summary report for a walk-in appointment, mark a student as a no show, or edit existing summary reports.

For Scheduled Appointments: There are several different ways to create an Appointment Summary Report for scheduled appointments. **Add Appointment Summary** is an option in the Actions drop-down menu throughout the platform. The easiest way to access your appointments is from your Staff Home page. Under the **Students** tab on Staff Home, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Add Appointment Summary** from the Actions drop-down menu. You can also access this section from the **Upcoming Appointments** tab of Staff Home.

Note: It is important to always create Appointment Summary Reports from the scheduled appointment itself, rather than ad-hoc, to ensure the Summary Report is tied to that specific appointment.

For Drop-in Appointments: There are several different ways to create an ad-hoc Appointment Summary Report for walk-in appointments. **Create Appointment Summary** is an option in the **Actions** drop-down menu throughout the platform. The easiest way to create an ad-hoc Appointment Summary Report for a walk-in appointment is from Staff Home or a student profile. Under the Students tab of Staff Home, find the specific student in your My Assigned Students section, or click the drop-down to find the student from one of your saved lists. From this section, you can click on a student and select Create Appointment Summary from the Actions drop down. This will create an Appointment Summary and add that appointment to your calendar in the past.

**For more detailed guidance, check out the Help Center!**

Appendix D: Add Ad Hoc Appointment Summary Reports

Documenting an Advising Interaction

You can also create an ad hoc Appointment Summary Report from a student's profile page. Navigate to that specific student's profile and click **Report on Appointment** from the Actions menu on the right. This will create an Appointment Summary and add that appointment to your calendar in the past.

Reminder: When creating an ad-hoc Appointment Summary Report to track drop-in appointments, the MavCONNECT platform will create the relevant appointment on your calendar for the date and time you selected in the past. Creating that appointment helps our system keep track of all appointments happening with students, regardless of whether they were scheduled or walk-ins. If you sync your professional calendar to the MavCONNECT platform, this appointment created in the past will also sync to that calendar.

For No-Show Appointments: The primary way to mark a student as a no-show for a scheduled appointment is from Staff Home. On the **Students** tab, scroll down and find your Recent Appointments. From this section, you can click on a student and select **Mark No-Show** from the Actions drop down. You can also access this section from the **Upcoming Appointments** tab of your homepage. Marking a student as a no-show still adds a Summary Report to the appointment. The only difference is that the box next to the student's name called **Attended** will not be checked. See the screenshot below.
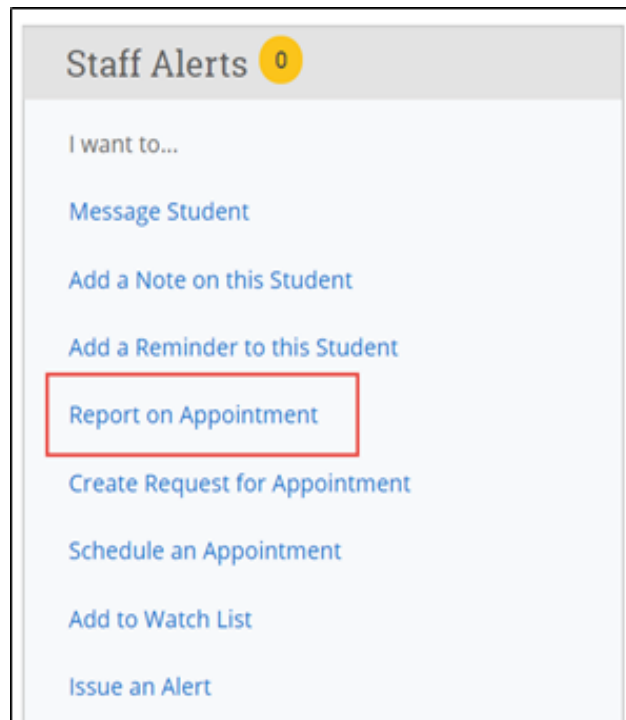
==**Important Note:** Any information you enter into MavCONNECT pertaining to a student becomes a part of their official student record and may be subpoenaed by that student, as outlined in the Family Educational Rights and Privacy Act (FERPA).==

For more detailed guidance, check out the Help Center!

Appendix E: Creating an Appointment Campaign

FALL 2023 IMPLEMENTATION

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

Define Campaign:

- o Name your campaign (Students will not see the name of the campaign)
- o Select "Advising" as the Care Unit (or the applicable Care Unit for your campaign)
- o Location- Choose your location. NOTE: Ensure that for the campaign availability you have created under "My Availability" you have selected that you will be available in the same location (Advisor's office).
- o Under "Service", choose the services for which you are available. NOTE: This must match the availability you have set up on your staff home page, under "My Availability".
- o Begin Date and End Date- choose the date range for which you want the campaign to run. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired. NOTE: This must match the availability you have set up on your staff home page, under "My Availability".
- o Appointment Limit- how many appointments can the student schedule for the campaign? (default is 1)
- o Appointment Length- how long do you want the appointment to last?
- o Select 1 slot per time (select more if you'd like more than 1 student to select the same time slot)

Adding Students: Use the advanced search feature to search for students you would like to participate in the campaign. Or choose one of your saved searches by clicking the drop-down arrow beside "Saved Searches".

Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under "Add Advisors to Campaign". If applicable, select other advisors to join your campaign.

Compose Your Message:

- o Create a Subject Line for your email
- o In the next box, edit the text for the email. Default is "Please schedule your advising appointment". NOTE: Always be sure to keep the Schedule Link in your email body, if that is removed students will be unable to schedule appointments.

Confirm & Send: Review the details of your campaign. When you are ready, click send to issue the email to students on the list.

For more detailed guidance, check out the Help Center!

Appendix E: Creating an Appointment Campaign

FALL 2023 IMPLEMENTATION

Adding Staff: If you have correctly set up your availability for Campaigns then you should see your name on the next page under "Add Advisors to Campaign". If applicable, select other advisors to join your campaign.

Add Welcome Message, Nudges, and Success Message:

Nudges replace the Compose a Message functionality and allows for more communication from your school to students during an Appointment Campaign. Each nudge is an email or SMS message sent to your campaign list.

o   Click **Add Welcome Message** to create your first nudge. You have a choice to create either an Email nudge or an SMS nudge. You must create at least one nudge per campaign. The nudge can be either an email or an SMS. Only one nudge type (email or SMS) can be sent per day. There are no limits to the amount of nudges you choose to send during the campaign.

o   Enter a subject line and customize the message.

o   Choose a Send Date. This is the date the nudge is to be sent. Nudges are sent in the morning of the date chosen when you create the nudge.

o   After creating a nudge, click **Save Nudge** to add it to your campaign.

o   You can also create a Success Message on the Nudges step of an Appointment Campaign. This is an email or SMS message sent the day after the recipient schedules all appointments for the campaign. It is for communication purposes only. Click **Add Success Message** to start creating a Success Message.

o   The **Add Success Message** page is like the Add Nudge page; however, there is no Send Date because the Success Message only sends after the student schedules an appointment.

Verify & Start: Review your campaign details, nudges, invitees, and advisors on this page. Click **Start Campaign** when you are ready to email the invites to the selected students.