From: **Casey Machuga** cmachuga@GMU.EDU
Subject: [MAAN] Navigate Tip of the Month - NEW Default Views!
Date: February 6, 2023 at 10:00 AM
To: MAAN-L@LISTSERV.GMU.EDU

CM

Happy February, MAAN!

I'm excited to share this month's tip - which is a new feature in Navigate. You can change your default views to make your staff home more customized to you.

You can customize the following:

Email signature: add your email signature so that any email coming from you directly from Navigate has your signature.

Default term: change the term that you want Navigate to operate in (default is current Banner term)

Default landing page: change your landing page to something other than Staff Home.

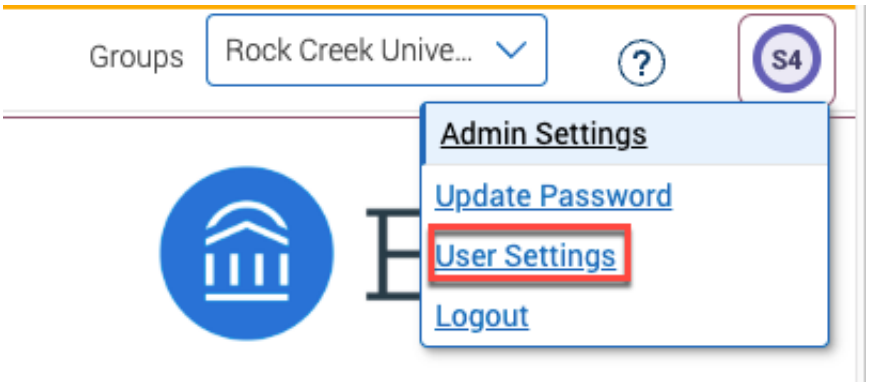
Default student profile tab: choose the page that you want to see first when you go to a student's profile.

Default care unit: choose your care unit that will auto-fill in your ad-hoc appointment summaries

Default location: choose your location that will auto-fill in your ad-hoc appointment summaries

You can change any of these settings any time! You can play with it to see what will be the most effective for your personal workflow. **Note: This is optional.** If you don't customize them, system defaults will be in place and you won't see a change.

Find these settings by going to your User Settings:



More information can be found in this EAB help article: https://helpcenter.eab.com/hc/en-us/articles/5171977689111-User-Settings.

Note: You must have the help center open in Navigate to access this article.

David has also created a pdf which I have attached here and can also be found on the blackboard site.

Please let us know if we can support you in utilizing this or any other feature in Navigate.

Kindly,
Casey

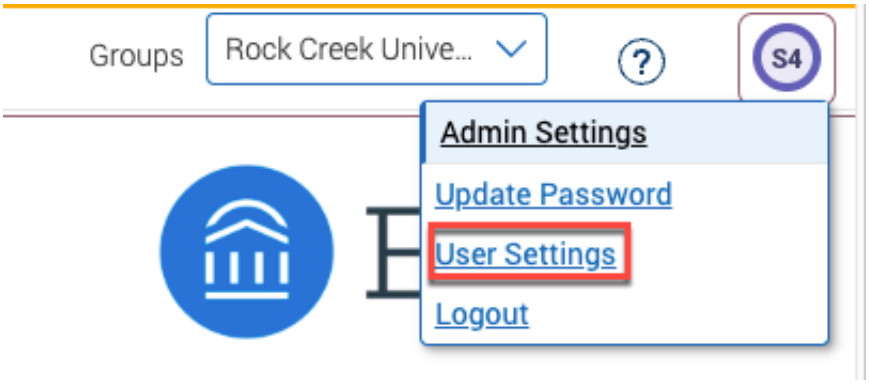
Casey Machuga(she, her, herself)
Assistant Director of Student Success Technology
University Life Technology Services

It's Mason's Time.

_____
Follow the Mason Academic Advisor Network on Facebook!

To unsubscribe, go to MAAN-L and click "Subscribe or Unsubscribe"

PDF
New prefere...23.pdf



NEW User Preferences in Navigate (Spring 2023)

HIGHLIGHTS

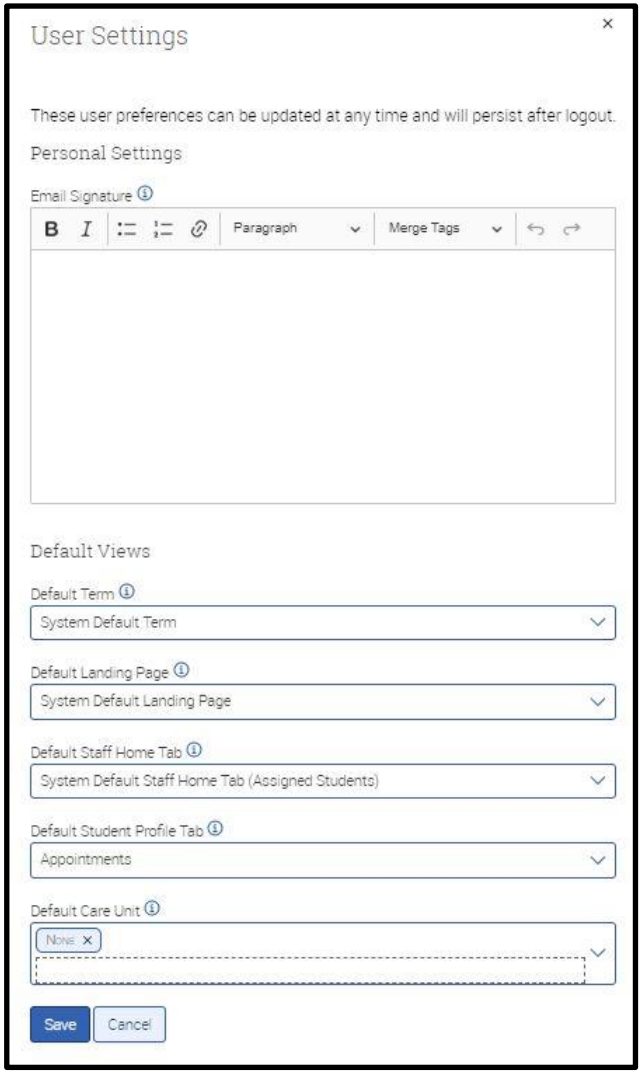
Advisors/coaches can now set up preferences that can be used across Navigate emails. The ability to custom design a “signature” for use in emails will keep your emails looking professional and take you less time in composing communication.

Advisors/coaches can now set up preferences that can be used to set defaults for where you want your staff page to start and your target student’s page to start

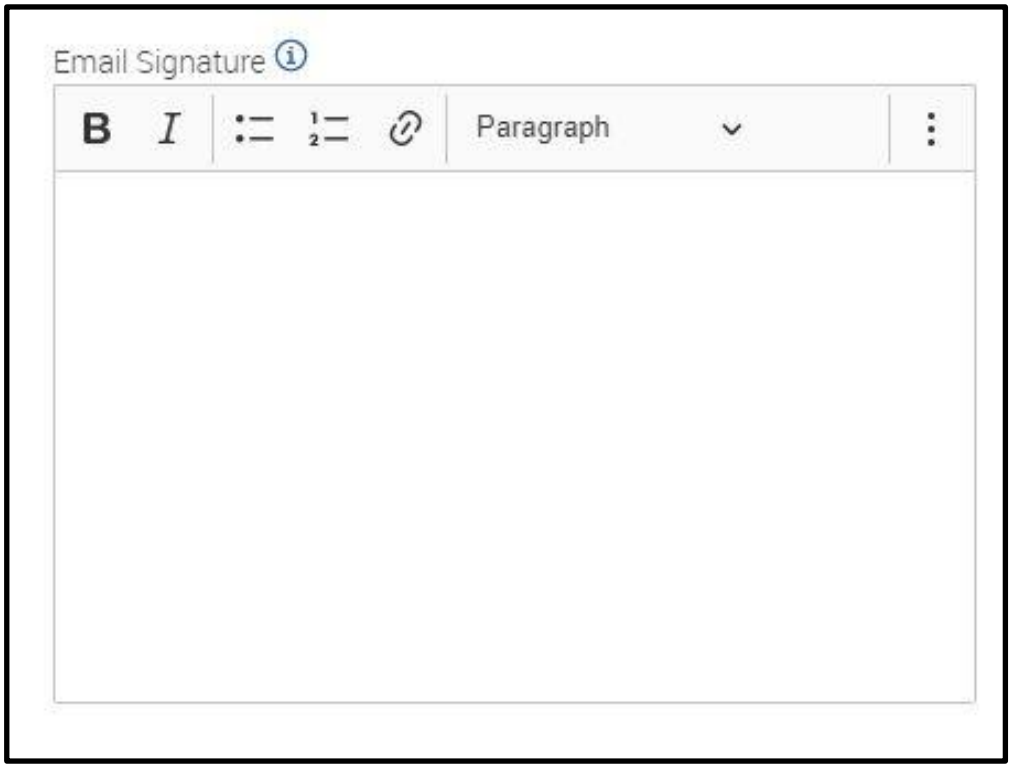
Advisors/Coaches can now set up custom column data in your “assigned” student list on your Navigate profile. This will allow you to show/hide column data that is important to you.

EMAIL SETTINGS FOR YOUR NAVIGATE COMMUNICATION AS WELL AS DEFAULT VIEWS OF CERTAIN PAGES CAN BE SET FROM YOUR STAFF HOME PAGE.

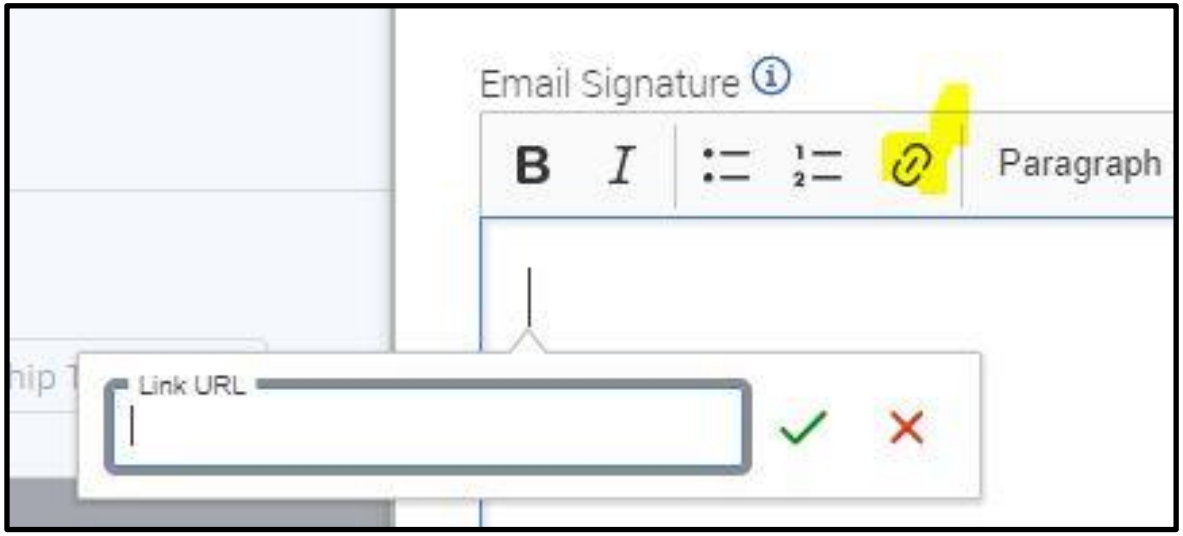
START FROM YOUR INITIALS IN THE UPPER RIGHT HAND CORNER.



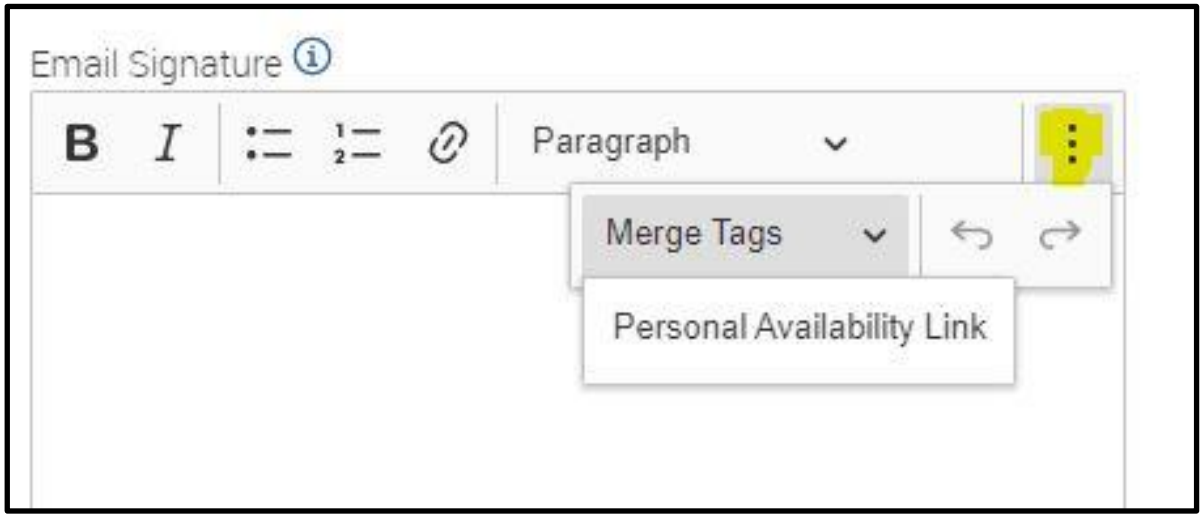
CREATE A SIGNATURE USING THE TOOLS IN THE COMPOSE BOX.
YOU CAN USE TEXT (SORRY NO PICTURES YET) AND ADD LINKS AND MERGE TAGS.



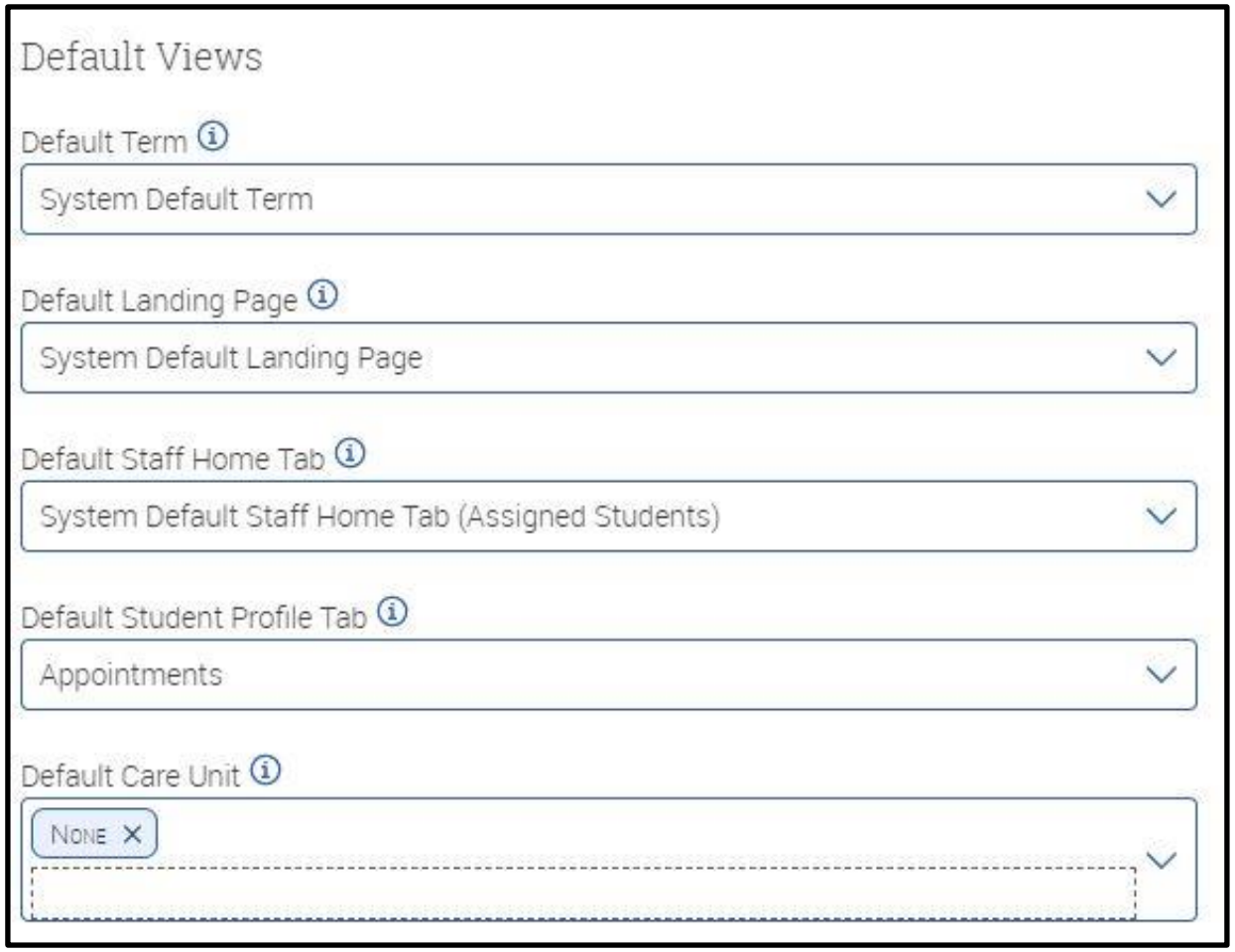
TO ADD URL LINKS SELECT THE TEXT THAT YOU WANT TO HOLD THE LINK AND THEN CLICK ON THE LINK ICON.



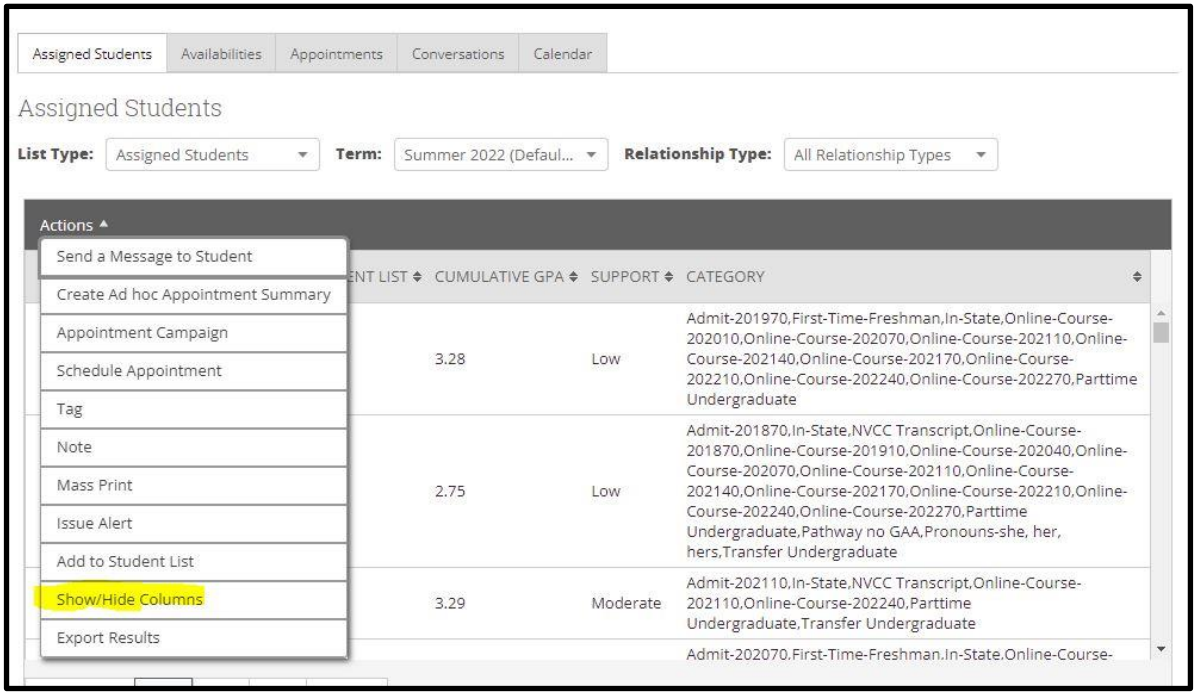
TO ADD YOUR PERSONAL AVAILABILITY LINK FOR STUDENTS TO GET TO YOUR ADVISING SCHEDULE, SELECT THE PLACE IN THE EMAIL WHERE YOU WANT IT TO GO AND SELECT THE PAL LINK FROM THE MERGE TAG DROPDOWN.



TO CUSTOMIZE YOUR ADVISOR VIEWS YOU CAN CHANGE YOUR DEFAULT VIEWS USING THESE DROPDOWNS.



YOU CAN CHANGE YOUR VIEWS IN YOUR ASSIGNED STUDENT LIST BY SELECTING THE "ACTION" BUTTON AND THEN "SHOW/HIDE COLUMNS" TO SHOW THE DATA THAT YOU NEED FOR ADVISING STUDENTS.



FREQUENTLY ASKED QUESTIONS!

Can I add attachments, pictures and links to my email signature:

Yes you can add attachments and URL links, but no pictures can be used at this time.

Can I change my email signature:

Yes, you can change it at any time in your preferences and when you save the changes the new signature will be used from then on.

WE ARE HERE TO HELP YOU IF YOU HAVE CONCERNS ABOUT THIS PROCESS

CONTACT US AT:
SSCHELP@GMU.EDU