

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.

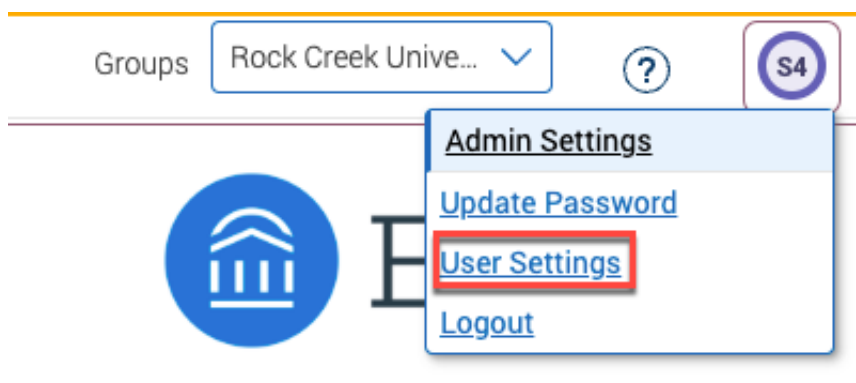
**Default student profile tab:** choose the page that you want to see first when you go to a student's profile.

**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)  
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University Life Technology Services

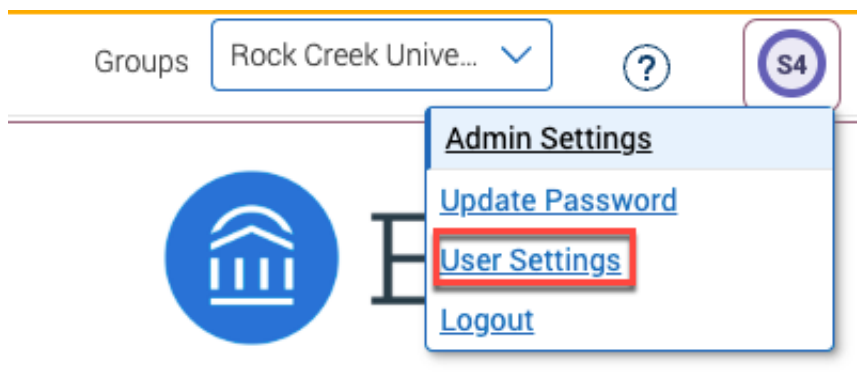
## ***It's Mason's Time.***

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New  
prefere...23.pdf





**NEW** User Preferences in Navigate  
(Spring 2023)

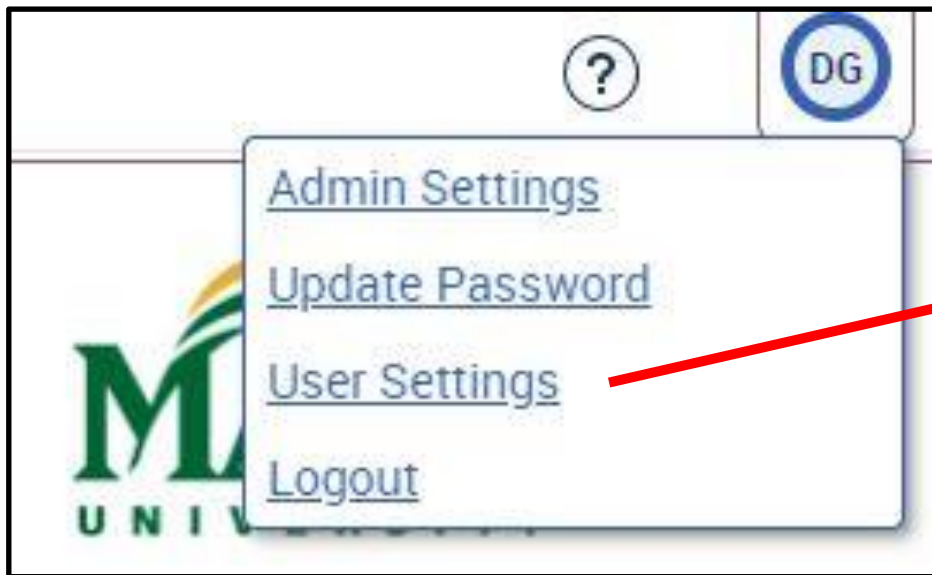
## HIGHLIGHTS

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.

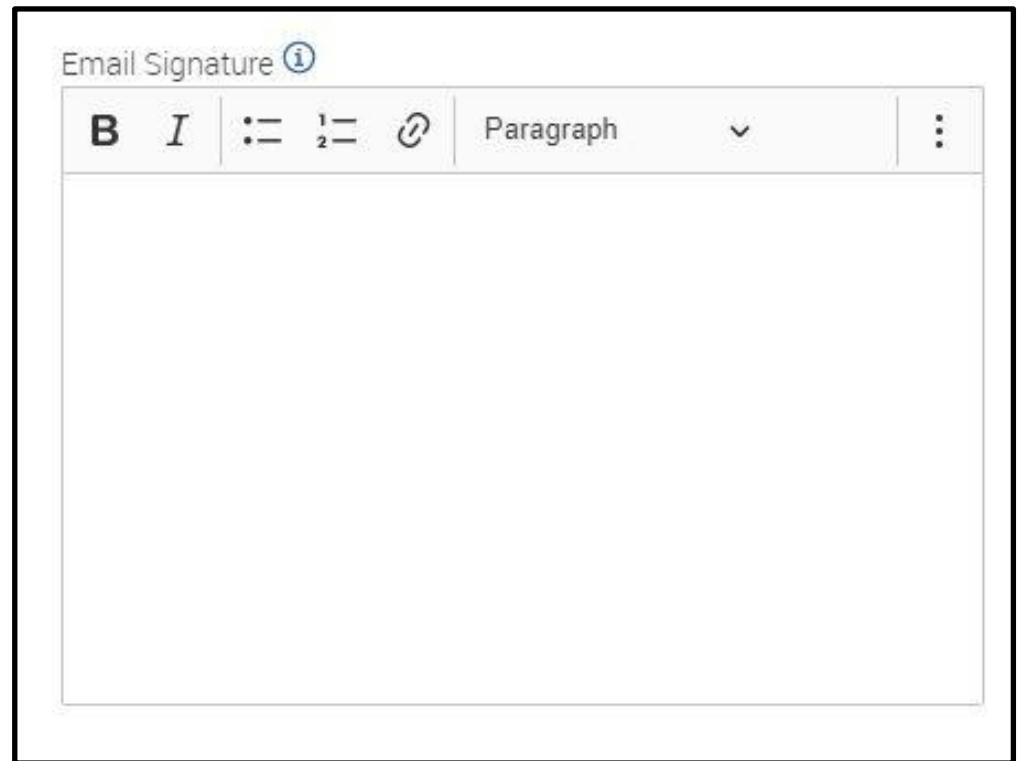
Advisors/coaches can now set up preferences that can be used to set defaults for where you want your staff page to start and your target student’s page to start

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.**

A screenshot of a 'User Settings' window. The window title is 'User Settings' with a close button (X) in the top right corner. Below the title, a message states: 'These user preferences can be updated at any time and will persist after logout.' The settings are organized into sections. The 'Personal Settings' section includes an 'Email Signature' field with a rich text editor toolbar (Bold, Italic, Bulleted List, Numbered List, Link, Paragraph, Merge Tags, Undo, Redo) and a large text area. The 'Default Views' section contains five dropdown menus: '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' (Appointments), and 'Default Care Unit' (None). At the bottom of the window are 'Save' and 'Cancel' buttons.

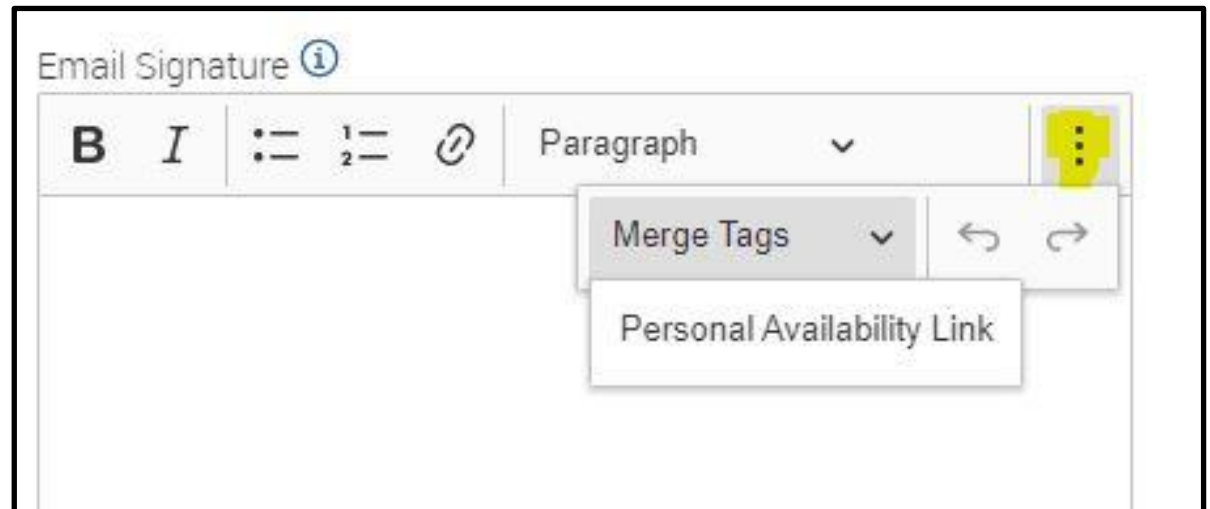
CREATE A SIGNATURE  
USING THE TOOLS IN THE  
COMPOSE BOX.  
YOU CAN USE TEXT (SORRY  
NO PICTURES YET) AND  
ADD LINKS AND MERGE  
TAGS.



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.

## 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 ⓘ

Appointments



Default Care Unit ⓘ

NONE X



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.

The screenshot displays the 'Assigned Students' interface. At the top, there are tabs for 'Assigned Students', 'Availabilities', 'Appointments', 'Conversations', and 'Calendar'. Below these tabs, the title 'Assigned Students' is followed by filters: 'List Type' (Assigned Students), 'Term' (Summer 2022 (Default...)), and 'Relationship Type' (All Relationship Types). The main content area shows a table with columns: 'STUDENT LIST', 'CUMULATIVE GPA', 'SUPPORT', and 'CATEGORY'. An 'Actions' menu is open over the table, listing various options: 'Send a Message to Student', 'Create Ad hoc Appointment Summary', 'Appointment Campaign', 'Schedule Appointment', 'Tag', 'Note', 'Mass Print', 'Issue Alert', 'Add to Student List', 'Show/Hide Columns' (highlighted), and 'Export Results'. The table data includes three rows of student information with their respective GPAs and support levels.

STUDENT LIST	CUMULATIVE GPA	SUPPORT	CATEGORY
Admit-201970,First-Time-Freshman,In-State,Online-Course-202010,Online-Course-202070,Online-Course-202110,Online-Course-202140,Online-Course-202170,Online-Course-202210,Online-Course-202240,Online-Course-202270,Parttime Undergraduate	3.28	Low	
Admit-201870,In-State,NVCC Transcript,Online-Course-201870,Online-Course-201910,Online-Course-202040,Online-Course-202070,Online-Course-202110,Online-Course-202140,Online-Course-202170,Online-Course-202210,Online-Course-202240,Online-Course-202270,Parttime Undergraduate,Pathway no GAA,Pronouns-she, her, hers,Transfer Undergraduate	2.75	Low	
Admit-202110,In-State,NVCC Transcript,Online-Course-202110,Online-Course-202240,Parttime Undergraduate,Transfer Undergraduate	3.29	Moderate	

# 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](mailto:sschelp@gmue.edu)