

Training - Automated Actions in Navigate Staff

Create a Saved Search

In order to create an Automated Action of any kind, you must first create a Saved Search. While search parameters will differ based on your goal, one thing that will always be used is the check box at the bottom that states, “My Students Only”. This will pull students from your personal caseload only, regardless of other parameters/variables.

The screenshot shows the 'New Search' form in the Navigate Staff interface. The form includes a 'Saved Searches' dropdown, a 'Keywords' field, a 'Type' dropdown (set to 'Students'), and a list of search criteria: Student Information, Enrollment History, Area of Study, Term Data, Performance Data, Course Data, Assigned To, Academic Plan, Polls, Success Indicators, and Nav Info. At the bottom, there are three checkboxes: 'Include Inactive', 'My Students Only' (checked), and 'At-Risk Students Only'. A blue 'Search' button is located to the left of these checkboxes. A red arrow points to the search icon in the left sidebar, and another red arrow points to the 'My Students Only' checkbox.

For a basic “Welcome” message to students on your caseload, all that is needed is to check the “My Students Only” box - no other variables necessary.

Click the blue “Search” button at the bottom of the page.

First go to the blue “Lists and Saved Items” icon on the left-hand side. Scroll down to the bottom to find “Automations”. Click “New Automation” to begin a new automation.

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Navigate [Icons: Home, Mail (2), Calendar (1), Search (1)]

Saved Searches

Saved Searches are dynamic lists of students. The results change as student data changes to move within our outside of the search criteria. Use Saved Searches to run a pre-configured Advanced Search without having to create the search again.

Actions ▾		New Saved Search
<input type="checkbox"/>	NAME	USED IN AUTOMATION
<input type="checkbox"/>	Notify ELED and SECD	No
<input type="checkbox"/>	Running Start Event Email	No
<input type="checkbox"/>	MTHD 103 Winter 23	No
<input type="checkbox"/>	MTHD 103 Winter 23 (with TBP = 20)	No
<input type="checkbox"/>	SMurray - Caseload	Yes

Saved Reports

Use reports to access data and analytic insights related to student success programs. Use Saved Reports to run a pre-configured report without having to create it again. Just adjust your dates and go.

Actions ▾		New Saved Report		
<input type="checkbox"/>	NAME	REPORT TYPE	ACTIVE SCHEDULE	PAST REPORTS
None found				

Automations

Use automations to apply common actions to your saved searches on a recurring basis.

Actions ▾		New Automation					
<input type="checkbox"/>	NAME	STATUS	AUTOMATION TYPE	SEARCH	# MATCHES FOUND	# ACTIONS TAKEN	# MATCHES OMITTED
<input type="checkbox"/>	SMurray - New to Caseload Welcome Message	Active	Send a Message - E-mail	SMurray - Caseload	240	0	240

Next, type or copy/paste in an email subject and the body of the email.

The screenshot shows an email composition window. At the top, there are two buttons: "Send E-mail" (highlighted in blue) and "Send Text". Below these, a red circle with the number "1" points to the "Subject" field, which contains the text "Welcome from Your Academic Advisor!". Below the subject field, another red circle with the number "2" points to the "Message" field. The message field has a rich text editor toolbar with options for Bold (B), Italic (I), Bulleted List, Numbered List, Link, Paragraph, Merge Tags, and Undo/Redo. The message body contains a personalized greeting "Hi, {Recipient_name},", an introduction of Sandy Murray as the new Academic Advisor, and a list of resources for students, each preceded by a blue underlined link: "Academic Advising", "Canvas Login", "Textbook Lookup", "Academic Calendar", "Writing Center", "PLUS Tutoring & Academic Coaching", "Math Tutoring", "Financial Wellness Program", "Financial Aid & Scholarships", "Student Financial Services", "Counseling & Wellness", "Records & Registration", "Campus Housing", and "Event Calendar".


Then, set the Automation Schedule by indicating the start and end dates for this automation. Be sure to come back and extend the date if needed, or feel free to have an end date that is many years into the future. Also indicate how often you would like this automation to run (check for new matches). For a welcome message to new advisees, it is recommended you run this daily.

The screenshot shows the "Automation Schedule" configuration form. It starts with a title "Automation Schedule" and a descriptive paragraph: "Specify how long the automation should run. Then choose how often you want to check for new students that match the criteria. Any new students who meet the criteria will be added to the automation and the action will be applied on this schedule. You will be notified by email 2 hours before each automation run. You will be able to review a list of students included in the automation and have the opportunity to cancel an automation run or to omit individual students." Below this, the "Automation Duration" section asks "How long would you like your automation to run?". It features two date pickers: "Start" (set to "September 20, 2023") and "End" (set to "December 29, 2023"). The "Automation Frequency" section asks "How often should we check for new matches? The selected action will be processed at the interval and time of day in your institution's time zone, subject to processing time delays." It has three radio button options: "Daily" (selected), "Weekly", and "Monthly". Below the frequency options is a "Time" field with a dropdown menu set to "8:00 AM PT". At the bottom of the form are two buttons: "Save Automation" (highlighted in blue) and "Cancel".

Final Confirmation Screen

This is what the final screen will look like when you are finished!

Test Auto Action - Caseload Welcome



Automation is Inactive

This Automation will not run on the configured schedule while in inactive status. Change the status to Active to begin the Automation.

Based On Saved Search: Melanie Thomas Caseload

< Back to Automations

Edit Automation

Active Status:

INACTIVE

Duration:

SEPTEMBER 20, 2023

 through

DECEMBER 29, 2023

Frequency:

DAILY, 8:00 AM

Action:

SEND A MESSAGE - E-MAIL

Total Matches Found:

0

Total Actions Taken:

0

Total Matches Omitted:

0

RUN DATE	SAVED SEARCH	SEARCHED AT	ACTION	STATUS	PROCESSED AT	MATCHES FOUND	ACTIONS TAKEN	MATCHES OMITTED
September 20, 2023	Melanie Thomas Caseload		Send a Message - E-mail	search_scheduled		0	0	0

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Page last refreshed at 2:28pm

All times listed are in Pacific Time (US & Canada)


Additional Modes





Configuration was successfully created, and the system is currently working to omit initial matches as requested.



























Lists and Saved Items in Navigate Staff

If you need to go back and review or alter your saved searches or automations, just click on the icon on the left-hand side and you will find them listed.

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Saved Searches

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Actions ▾

New Saved Search

<input type="checkbox"/>	NAME	USED IN AUTOMATION
<input type="checkbox"/>	below 2.5	No
<input type="checkbox"/>	Melanie Thomas Caseload	Yes
<input type="checkbox"/>	Melanie Thomas Warning/Probation	Yes

Saved Reports

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Actions ▾

New Saved Report

<input type="checkbox"/>	NAME	REPORT TYPE	ACTIVE SCHEDULE	PAST REPORTS
None found				

Automations

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Actions ▾

New Automation

<input type="checkbox"/>	NAME	STATUS	AUTOMATION TYPE	SEARCH	# MATCHES FOUND	# ACTIONS TAKEN	# MATCHES OMITTED
<input type="checkbox"/>	Test Auto Action - Caseload Welcome	Inactive	Send a Message - E-mail	Melanie Thomas Caseload	348	0	348
<input type="checkbox"/>	Test Auto Action - Warning/Probation	Inactive	Send a Message - E-mail	Melanie Thomas Warning/Probation	27	0	27