

► Cleveland MSD Naviance Training August 4th and 5th

To access Naviance as a Staff User

Website: succeed.naviance.com

Account Name: _____

Username: _____

Password: _____

To access Family Connection as a Student

School Website: connection.naviance.com/ _____ (same as school account name)

► Naviance and Family Connection Support

Questions about your user account, permissions, and access to tools and features on Family Connection?

Contact your school's site coordinator: _____

General Support Issues? Contact Support Services:

Call us at **866.337.0080** (toll-free) or **+1.703.859.7300** (international)

Hours of Operation: 8:00 a.m. – 7:00 p.m. ET on weekdays (except holidays)

Add Sample Student

Note: Based on CMSD District-Managed Permissions, Naviance user roles with the following permission profiles *will not* see options to add a sample student. If you believe this is an error, please contact the Naviance project manager, Meghann Sullivan (Meghann.Sullivan@clevelandmetroschools.org)

- Academic Team
- College Now – Top 50 Advisor
- College Now Advisor
- Counselor – HS Transition
- CWA Site Coordinator
- District Analyst
- Esperanza
- Flexpert
- HEC Partner
- Principal
- Scholarship Management

You can view your account's permission profiles by selecting the Account Settings icon in the top right-hand side of your Naviance account and clicking "My Account". Here you will see the "user role" that you have been assigned. Any questions or issues with your account permissions should be addressed with Meghann Sullivan (Meghann.Sullivan@clevelandmetroschools.org)

Creating a sample student in your account is an important step in getting started with Naviance. This process allows you to interact with the solution as you would when students are imported. It also allows you to test features and tools before you start using them with students.

To create a sample student:

1. Go to Students (top) > Add Student.
2. Enter information for your sample student. The required information is last name and gender.
 - When creating a sample student, the class year will default to 2014 (Grade 12). For middle schools, *I recommend changing the grade level to 2018 (Grade 8), 2019 (Grade 7), or 2020 (Grade 6) so that you will see what your students would see on Family Connection.*
 - Family Connection is configurable by student grade level so remembering what grade level your sample student is in will be important.
3. Click the Add Student button.
4. Your sample student is now in your student roster and can be found by searching by last name from the left navigation bar in the students tab.

Remember: *if you would like to test Family Connection, once you have added a sample student, you can use the Family Connection Quick Link from the left navigation bar in the student folder to view the Family Connection site as a student in that grade level would see it.*

Note your Sample Student's Name and Grade Level for future reference. You can create as many sample students as you want for your personal use and training

To Find your Sample Student as a teacher/counselor in Naviance:

- Select the **Students Tab** at the top, from the **left** side search options, search by your sample student's last name

Sample Student First Name	Last Name	Grade Level

Family Connection Features

Colleges Tab

FC Feature	Suggested Time and Grade level	Description
Colleges I'm Thinking About	9 th 10 th 11 th grades	Allows students to save colleges of interest Can assist with goal planning and helps students to identify levels of achievement needed to be competitive for their colleges of interest
Supermatch	~20 minutes 7 th , 8 th , 9 th 10 th 11 th 12 th grades	Allows students to identify qualities of colleges and universities that are of interest to them Acts as an introduction to college planning Allows students to save their searches and add colleges to their "Colleges I'm thinking about List"
College Search	~20 minutes 7 th , 8 th , 9 th 10 th 11 th 12 th grades	General college search tools for students to get more information about colleges of their choosing Works with locally defined college groups (i.e. 2 year community colleges in Maryland) Includes the option to find colleges within a certain mile radius Will eliminate colleges based on selected criteria
College Resources	7 th , 8 th , 9 th 10 th 11 th 12 th grades	Provides access to college search, financial aid, standardized test prep, military and college athletic websites and resources
Enrichment Programs	9 th 10 th 11 th 12 th grades	Provides access to Enrichment programs appropriate for high school students to learn more about volunteer, internship, travel and collegiate programs – information sourced from teenlife.com
National Scholarship Search	11 th and 12 th grades	Allows students to create their own profile to match to 3 million scholarship opportunities around the world Similar to Fastweb

Careers Tab

FC Feature	Estimated Time and Grade level	Description
Career Interest Profiler	~45 mins 10 th 11 th grades	Align students to the six Holland personality types by using four characteristics: preferred activities, competencies, self-perceptions, and values. Potential challenges: vocabulary, time to engage students in the classroom by team-teaching with computer teachers <i>Note: Once completed, results must be reset from the student's folder in Naviance in order for the student to re-take</i>
Career Cluster Finder	~15 minutes 7 th , 8 th 9 th , 10 th , 11 th , 12 th grades	Based on activities students enjoy, personal qualities, and school subjects students like, the survey ranks which career clusters students might find most fulfilling <i>Note: Results will save, however the student can reset their own survey results and take it again on Family Connection</i>
Do What You Are	~30 mins 9 th , 10 th , 11 th 12 th grades	Do What You Are introduces Personality Type - how you process information, make decisions and interact with the world around you - and shows you which of the 16 Myers-Briggs personality types describes students best

		<i>Note: Results will save, however the student can reset their own survey results and take it again on Family Connection</i>
Career Key	~15-20 mins 7 th , 8 th grade	Align students to the six Holland personality types by using four characteristics: preferred activities, competencies, self-perceptions, and values. Potential challenges: vocabulary, time to engage students in the classroom by team-teaching with computer teachers <i>Note: Once completed, results must be reset from the student's folder in Naviance in order for the student to re-take</i>
Roadtrip Nation Interview Archive	~20-30 min mini lesson 7 th -12 th grade	The Roadtrip Nation interview archive is a digital career exploration tool that enables students to discover new pathways, interests, and ambitions. The archive includes more than 3,500 full-length video interviews chronicling the diverse personal stories of leaders who have turned their interests into their life's work. Students can access the interview archive by clicking Explore More.

About Me Tab

FC Feature	Estimated Time and Grade level	Description
Resume Builder	7 th - 12 th grade	Allows students to keep a record of their accomplishments and achievements over the years Professionally formatted resumes can be customized depending on the type of resume they are looking to create in a printable format Supports students with resume writing tips Great for writing letters of recommendation!
StrengthsExplorer	~30 mins plus time for extension activities if desired 7 th – 10 th grades	The StrengthsExplorer is a strengths assessment that assesses 10 talent themes for individuals and identifies each student's three strongest emerging talents. During the assessment, students can stop and the assessment will save their answers where they left off. Students will learn how to capitalize on their success and discover what they need to do next to continue building on their strengths. This assessment is recommended for middle school and high school students. 78 questions in length – short statements that students will rate the degree to which they agree/disagree

My Planner Tab

FC Feature	Estimated Time and Grade level	Description
SMART Goals	9 th 10 th 11 th and 12 th grade 20 mins	SMART Goal template provided to facilitate in-depth goal planning with students Allows teachers, counselors, students, and parents to view and comment on course planning Challenging and building year over year Facilitates progress monitoring on goals throughout the school year Secures buy-in from students for follow-through

Naviance School Site Manager

The Naviance site manager is considered the leader of Naviance implementation at each of the school sites. The school site manager has additional account permissions that allow that person to act as a “webmaster” for updating information on the school’s family connection site, activating features for student use, and acting as a central point of contact and communication for the Naviance implementation team. The Naviance site manager is considered a leadership role and should be a key stakeholder in ensuring successful Naviance implementation at their school site.

Site Manager Responsibilities

System Setup

- › **Assign Counselors:** The Assign Counselors page of the Setup section provides several ways to batch-assign counselors to students
- › **Enable Family Connection settings for all dimensions of Naviance:** Features can be enabled on the Select and Update Optional Features page (See age appropriate suggestions for ideas). The Select and Update Optional Features page is key to selecting what features will be available to which grade years. These settings will enable various tools on Family Connection.
- › **Activate website:** Once your Family Connection site is set up, it can be activated for users by going to the Activate website page
- › **Optional: Enable automated reminders for college visits and success planning tasks:** The Reminders page gives schools the ability to send out automated reminders and configure settings for reminders.
- › **Update preferences menu:** The Preferences menu has many configuration options that need to be set when initially setting up Naviance
- › **Optional: Create Application Flags:** Application flags allow you to track special characteristics about a college application such as legacy status. They are used from the Colleges tab of a student folder and with some college planning tools.
- › **Configure options for transcript requests:** Options for transcript requests are handled on the Settings tab of Transcript Request Manager
- › **Enable teacher recommendation options:** Options for teacher recommendation requests are handled on the Settings tab of the Recommendations

Family Connection Website Customization and Maintenance

- › **Create Welcome Messages:** Welcome messages can be customized per grade year. These messages are authored/published on the Customize Welcome Messages page in the Family Connection menu
- › **Change the theme (color scheme):** Naviance provides several pre-defined themes that can be selected from the Select Theme page.
- › **Upload your school logo:** Your school can add the school logo to Family Connection. The logo must be in GIF, JPG, or PNG format and will be resized to 500 x 215 px after uploading
- › **Custom HTML pages:** Schools can add an unlimited number of custom HTML pages to Family Connection. They appear on the Home page.

- › **Custom links:** The Custom Links page in the Family Connection menu gives schools the ability to add a menu of useful links that will appear on the Family Connection Home page. These can be filtered by grade level.
- › **Add Colleges to the Quicklist:** Quicklists help staff become more efficient by having commonly-accessed colleges on a single list. To add a college to the quicklist, open the profile and click **Add to Quicklist**

School Data

- › **Import/Update Teacher list:** Importing a teacher list provides a list of teachers that students can request recommendations from. It will not create user accounts for those teachers in Naviance; however, the teacher list will allow you to centrally manage your school's teacher list, and allow you to more easily activate teacher user account access

Recurring Naviance Maintenance

- › Review and update Family Connection welcome messages, announcements, and links (review quarterly/per semester – as needed)
- › Maintain staff user accounts (beginning of year updates, review per semester)
- › Maintain counselor/advisor assignments
- › Maintain/coordinate college visits schedule – can be delegated to secretarial staff
- › Submit new scholarships to the district
- › Submit new enrichment programs to the district
- › Coordinate training for the school Serve as point-of-contact and reference for Naviance
- › Monitor usage and address compliance issues

› How-To's in Naviance:

Assigning Students to Counselors

In many high schools, students are assigned to counselors who assist them in post-secondary planning based on a student's year of graduation or alphabetically based on the student's last name.

Using the Assign Counselors feature, a user can:

- [Assign all students in a class to the same counselor](#)
- [Assign students to counselors based on the students' last names](#)
- [Assign students to counselors based on homeroom or group](#)
- [Assign students arbitrarily to counselors](#)
- [View current counselor assignments for an entire class](#)

To assign all students in a class to a specific counselor:

1. Go to **Setup > Assign Counselors**.
2. Click **Assign All Students in a Class to a Single Counselor**.
3. From the **Select Grade/Class** drop-down menu, choose a year.
4. From the **Select Counselor** drop-down menu, choose a counselor.
5. Click the **Assign Counselor** button.

To assign students to counselors alphabetically by students' last names:

1. Go to **Setup > Assign Counselors**.
2. Click **Assign Each Counselor by Alphabet**.
3. From the **Select Grade/Class Year** drop-down menu, choose a year.
4. Choose one or more counselors and specify the starting letter.
5. Click the **Assign Counselors** button.

To assign students to counselors arbitrarily:

1. Go to **Setup > Assign Counselors**.
2. Click **Assign each counselor to an arbitrary student**.
3. From the **Select Grade/Class** drop-down menu, choose a year.
4. Choose the **Counselor** from the drop-down menu next to the student.
5. Click the **Assign Counselors** button.

To assign students to counselors by group:

1. Go to **Setup > Assign Counselors**.
2. Click **Assign students by Group**.
3. From the **Select Grade/Class Range** drop-down menus, choose a year range.
4. Choose the **Counselor** from the drop-down menu.
5. Choose the student group that you would like to assign.
6. Click the **Assign Counselors** button.

To assign students to counselors by home room:

1. Go to **Setup > Assign Counselors**.
2. Click **Assign Students by Home Room**.
3. Choose a **Counselor** from the drop-down menu next to the homeroom.
4. Choose the **Grade/Class Year** range from the drop-down menu.
5. Click the **Assign Counselors** button.

If you need to change the counselor assignment of an individual student after using the Assign Counselors feature, Go to **Students > View Students** and edit the student's profile.

In order to assign students to a counselor, the counselor must be defined as a user in Naviance and his or her user account must be included in the counselor list.

Activating Family Connection

You have the ability to turn your Family Connection website on and off. This is useful because you do not have to turn on the Family Connection website until you are finished setting configurations.

Additionally, if you need to make major updates, you can prevent students and parents from accessing the site during this time.

To activate Family Connection:

1. Go to **Connections > Family Connection**.
2. Click **Activate Website**.
3. Select Site is **ON** or Site is **OFF** from the drop-down menu and click **Change Status** to activate or deactivate Family Connection.

Turning Family Connection Tabs Off by Grade Level

When enabling the features for Family Connection, you can choose to hide or show specific tabs to the students. The following tabs can be managed this way:

- Colleges
- Courses
- My Planner

- Careers

To manage the visibility of the tabs in Family Connection:

1. Go to **Connections > Family Connection**.
2. Click **Select and Update Optional Features**.
3. Scroll to the section related to the tab you would like to manage.
4. Check the box(es) corresponding to the grade levels for which the tab should be activated.
5. Click the **Update Features** button.

Add a Welcome Message

You can create several welcome messages to display on the **Home** page of Family Connection, but you can only display one welcome message per grade level at a time.

How to create a welcome message:

1. Go to **Connections > Family Connection**.
2. Select **Customize Welcome Messages** from the menu. A list of messages will appear if there are existing messages.
3. To create a new welcome message, click **Create New Message**.
4. Enter a label for the welcome message. **Example:** *Senior Class* for a message to the seniors.
5. Create and format the message in the **Add Content** box. You can include text, images and links.
6. Click **Save**.
7. Once you create a message, select which grade levels should see it.

Add a News Bulletin

News bulletins display in the **Updates** section of the Family Connection **Home** page.

To add a news bulletin:

1. Go to **Connections > Family Connection**.
2. Click **Add News Bulletins**.
3. Click **Add a News Bulletin**.
4. Enter the headline, start date and end date in the provided fields.
5. Enter the content in the **Bulletin Content** field.
6. Click the **Save** button.

Selecting a Family Connection Theme

There are a number of color schemes for Family Connection provided in Naviance.

To change the theme of your school's Family Connection site:

1. Go to **Connections > Family Connection**.
2. Click **Select Themes**.
3. Scroll down to see sample images of each theme.
4. Select the theme from the **Current Theme** drop-down menu.
5. Click **Change Color**.

Adding your School's Logo to Family Connection

If your school uses Family Connection, you can upload a logo that will appear in the header on your Family Connection website. You can upload a logo in GIF, JPEG, or PNG format. You can prepare or modify a logo in widely used software applications such as Adobe Photoshop, Macromedia Fireworks, and Microsoft Paint.

To upload a logo for printer-friendly pages:

1. Go to **Connections > Family Connection**.
2. Click **Upload Logo**.
3. Click the **Browse** or **Choose File** button.
4. Locate the logo on your computer, and then double-click the logo file.

- Click the **Upload Logo** button.
Once you upload a graphic, it will be resized to 500 pixels wide, 215 pixels in height, and placed in the lower left corner of the page, with the school's information (school name and address) in the lower right corner.

Add or Delete a Custom HTML Page

School staff can add an unlimited number of custom pages to your school's Family Connection website. This feature can be used to post information about the application process at your school, guidelines for using counseling services, content from or in place of your school's counseling handbook, and more.

To add a custom page:

- Go to **Connections > Family Connection**.
- Click **Custom HTML Pages**.
- Click **Create New Custom Page**.
- In the **Edit Page Name** field, enter a name for the page. The page name will be the link to the page on Family Connection.
- In the **Edit Content** field, enter the text for the page.
- Click the **Save Changes** button.

Links to custom pages will be displayed on the **Home** page of Family Connection.

To delete a custom page:

- Go to **Connections > Family Connection**.
- Click **Custom HTML Pages**.
- Click **Garbage Can Icon**. (A confirmation message will display)

The custom page will be deleted.

Add, Edit or Delete a Custom Link

You can add an unlimited number of custom links to your school's Family Connection website. Use this feature to link to other web resources that you purchase for your school, another website you created, or third-party sites that you recommend to students and families.

To add a custom link:

- Go to **Connections > Family Connection**.
- Click **Custom Links**.
- In the name field, enter a name for the link which will appear in Family Connection.
- In the URL field, enter the web address. (You do not need to include "http://".)
- Check the box(es) corresponding to the grade levels of students for which the link should be displayed.
- Click the **Add Link** button.

Links will be displayed on the **Home** page of Family Connection.

To edit a custom link:

- Go to **Connections > Family Connection**.
- Click **Custom Links**.
- Next to the desired link click **Edit**.
- Make desired changes and click **Update Link** to save.

To delete a custom link:

- Go to **Connections > Family Connection**.
- Click **Custom Links**.
- Next to the desired link click **Delete**.
- A verification window will open to confirm that you intend to delete the link.
- Check the box(es) corresponding to the grade levels of students for which the link should be displayed.
- Click **OK** to remove link.

Managing the College Quicklist

The college Quicklist is designed to give you easy access to the colleges you use most often. The college Quicklist is the first page that is displayed when you go to the **Colleges** tab and it is available as a drop-down menu when you are adding applications or prospective colleges to a student's folder. You can add any institution in the Naviance college database to the college Quicklist.

To add a college to the college Quicklist:

1. Go to the **Colleges** tab.
2. Search for a college, click the **College Name**.
3. Click **Add to Quicklist**.

If a college is already on the college Quicklist, the **Add to Quicklist** option will be replaced with **Remove from Quicklist** to allow you to remove a college from the list if you no longer need it to appear there. The college Quicklist is available to all College Planner users at your school.

Scheduling a College Visit

To schedule a college visit:

1. Go to **Colleges**, click **Visits**.
2. Click **Add New Visit**.
3. Click **College Picker**.
4. Search for college, click the **College Name**.
5. Complete any other optional details about the visit.
6. Click the **Add Visit** button.

To schedule a visit by a military recruiter or another organization that is not in the Naviance college database:

1. Go to **Colleges**, click **Visits**.
2. Click **Add New Visit**.
3. In the College/Organization field, type the name of the organization (e.g., United States Air Force).
4. Complete any other optional details about the visit.
5. Click the **Add Visit** button.

Sending Group E-mail to Students and Parents

Naviance allows you to send e-mail messages to a group of students or parents. You can define the group to receive the message using various criteria (e.g. student only, parents only, grade/class year, student group, etc.)

How to send an e-mail to a group of students and/or parents:

1. Go to **Connections > E-mail**.
2. Click **Send E-mail to a Group of Students and Parents**.
3. Choose a template from the drop-down menu. This step is optional.
4. Enter a subject for the e-mail.
5. Enter the message. You can add merge codes such as first name, last name, or Family Connection registration code to personalize e-mails. [Learn more about merge codes.](#)
6. Select the message recipients.
7. Click **Preview and Send**.
8. From the **Preview** page, you can copy staff members on the e-mail.
9. Add an attachment. This step is optional.
10. Uncheck anyone you do not want to receive the e-mail. Recipients listed in red do not have an e-mail address in Naviance, but will receive the message in Family Connection.
11. Click **Schedule Message** to send the e-mail.

Your message will start processing within ten minutes after clicking the **Schedule Message** button.

Creating Custom Student Groups

Naviance allows you to categorize students into groups that may be useful for analysis. You can use default groups provided in Naviance to track minority students, athletes, learning-disabled students, non-native English speakers, and more. An unlimited number of custom student groups can be created for your school.

To create a custom student group:

1. Go to **Students > Groups**.
 2. Click **Add New Group**.
 3. In the **Code** field, type an abbreviation for the group.
 4. In the **Name** field, type a descriptive name for the group.
 5. Click the **Add Group** button.
 6. Click **Edit Members** to select students that belong to this group.
- * You can also assign students to groups individually by editing the student folder or when importing data.

Customizing Reports

Naviance provides a wide array of reports designed to assist you. These reports are located on the **Reports** tab.

To view reports:

1. Go to the **Reports** tab.
2. Click **View** for the report you want to display.

To customize a report:

1. Go to the **Reports** tab.
2. Click **Customize** next to the report you want to customize.
3. To save your customizations, click **Save** from the toolbar of your report.

When you display a report, you can sort its contents by clicking any column headings that have up/down arrows. All reports are available as printer-friendly pages and many can also be displayed as Adobe PDF files. Select reports can be downloaded to a comma-separated values file that you can open in Microsoft Excel or another program. You can change formatting, add or remove data, and perform additional analysis.

Naviance: Teacher List Management

Creating User Accounts for Teachers

Naviance allows you to give specialized access to your teachers.

To manage your school's teacher list in Naviance:

1. Go to **Setup > Manage Teacher List**.
2. Click **Add New Teacher**.
3. Type the first and last name in the spaces provided and if available, provide the teacher's job title and e-mail address.
4. Click the **Add to List** button.

Note: Before creating a user account for a teacher, make sure you have set up a user role that has the appropriate permissions. For steps on how to create a new user role and recommended permissions for each role type, start with the article [Managing User Roles and Rights](#).

To create a user account for a teacher:

1. Click **Setup > User Admin**.
2. Click **Add New User**.

3. Select the teacher's name from the **Existing Contact** drop-down menu and click **Activate User** or populate the information if the teacher is not listed in the existing contact drop-down.
4. Enter any missing information in the online form.
5. Next to Include in teacher list: check the box the *user should appear in the list of teachers*
6. Click **Add User**.

The teacher will receive an automated e-mail message with a temporary password and instructions for signing in and choosing a new password. Please note that if your teachers are uploading recommendations for use in Naviance eDocs, you will need to give teachers the permissions to upload and enter information in the eDocs tab of student folders.

Adding or Importing a Teacher List

A teacher list is different than giving teachers user accounts. A teacher list is necessary if you are using Naviance to manage recommendations. Without a teacher's name on the list, students and staff will not be able to make recommendation requests to the teacher. For a teacher's name to appear in the drop-down menu, the teacher must be on that teacher list in Naviance.

You can add teachers individually or import a list of teachers.

To add a teacher to your school's teacher list in Naviance manually:

1. Go to **Setup > Manage Teacher List**.
2. Click **Add New Teacher**.
3. Type the first and last name in the spaces provided, and if available, provide the teacher's job title and an e-mail address.
4. Click the **Add to List** button.

To import your school's teacher list:

1. Prepare a comma-separated or tab-delimited file of your school's teachers. Include at least the first and last name of each teacher. Optionally, you can also include a middle name and e-mail address.
2. Go to **Setup > Data Import**.
3. Click **Import Teacher List**.
4. Follow the on-screen instructions to upload the file, map the fields, and import the list.

Managing the Teacher List

To delete or edit a teacher on the teacher list:

1. Go to **Setup > Manage Teacher List**.
2. Check the **User Account** column to see whether or not the teacher has a user account. If the teacher has a user account, you will be able to edit but not delete the teacher.
3. Click **Edit** next to the teacher you would like to delete or edit.
4. Make any necessary changes.

If you would like to remove a user from the teacher list, follow these steps:

1. Go to **Setup > Manage Teacher List**.
 2. Click **Edit** next to the teacher you would like to manage.
 3. Remove the check from the **Include in Teacher List** box.
 4. Click the **Update User** button.
- After completing these steps, the user is no longer displayed on the teacher list, but is still able to log in to Naviance