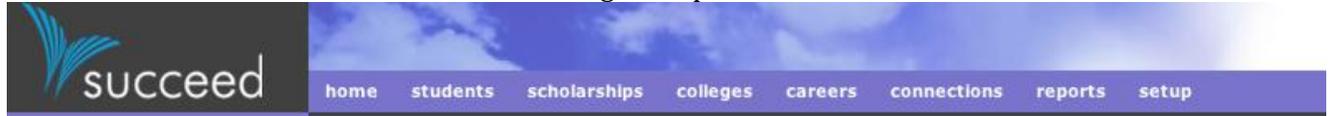


# Naviance Succeed

## Advanced Search

- Notice the 8 main tabs of Naviance Succeed along the top:



- Click on **Students**
- On the bottom of the left hand column, select **Advanced Search**. Notice you can also link to this feature by selecting **Student Search** in the black bar at the top.
- Select the features for your search and then click **Find Students**. Key points to remember:
  - **Grade/Classes**- You can search a single class by having the same grade listed in both the boxes. You can select multiple grades by having the lowest grade in the first box and highest grade in the second box
  - **Counselor** – You can select to only search your students. If you leave this set to “Does not matter”, you will see all JHHS students.
  - **Status** – Most of the time, you will want to set this for “Active Only”. “Inactive only” includes students who have transferred out of JHHS.
  - Other active features:
    - **Gender**
    - **Ethnicity**
    - **GPA range** – Can select weighted or unweighted and a GPA range.
    - **Plan range**
    - **ACT range** – Can select highest or most recent composite score and a score range.
    - **Student goal** – 137 juniors and 324 seniors have completed this survey as of 11/15.
    - **College in list** – Search for students interested in, applying or attending a single college.
    - **Applications** – Prior to the senior survey, only “no active applications” have data available.
    - **Family Connection Usage.**
  - Features where we have little to no data: **PSAT range, SAT range, student groups, Common Application FERPA waiver, Course Requests, School Attended.**

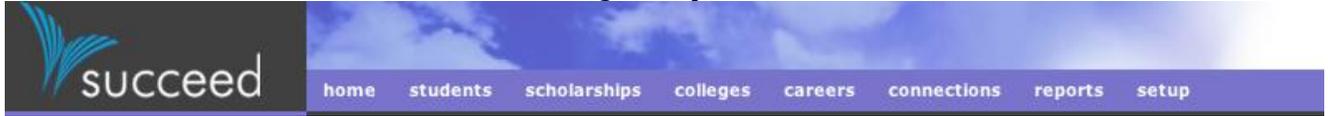
Examples of Advance Search uses:

- 1) Searching for your seniors with no college applications filed: Select **Grade/Class** of 2011, **Counselor** – your name, **Status** active, **Applications** – no active applications.
- 2) Searching for your seniors eligible for a scholarship: Select **Grade/Class** of 2011, **Counselor** – your name, **Status** active, and scholarship required **Gender, Ethnicity, GPA range** and **ACT range**.
- 3) Searching for your juniors who have not registered for Naviance: Select **Grade/Class** of 2012, **Counselor** – your name, **Status** active, **Family Connection** – not yet registered
- 4) Searching for your Class of 2010 students attending a particular college: Select **Grade/Class** of 2010, **Counselor** – your name, **Status** active, **College in list** – select college name and “attending only”

# Naviance Succeed

## Group Email

- Notice the 8 main tabs of Naviance Succeed along the top:



- Click on **Connections**
- Select **Email**. Notice you can also link to this feature either by selecting **Email** in the black bar at the top or within the Connections box.
- Click on: **Send email to a group of students and parents**
- Type the email message you wish to send and a subject line. The email will not send without a subject and a message.
- If you wish, you can select and insert mail merge features, such as the student's nickname or the parent's last name. Select from the **Merge codes** are listed on the right side of the page.
- Once you have completed the message you wish to send, you can either select **Save as Draft** or **Save as Template**. A draft is saved until your message is sent. A template is useful for those emails you may send multiple times. The next time you enter the email feature you can select your Draft or Template from the drop down menu at the top of the page.
- Select whether your email is for **Students only**, **Parents only** or **Students and their Parents**.
- If you scroll down, you will notice the search feature used to select email recipients is identical to the Advanced Search feature. You can refer to the description of the Advanced Search feature to help you decide which criteria to pick.
- Once you have selected chosen the type of students and/or parents to send the email to, click **Preview and send**. You will have a chance to preview the message before it is sent.
- Click on **CC other staff**, if you want to include other counselors, administrators or teachers to the email. Simply click on a name and select **Add**. Or you can **Select all** and then **Remove** selected names.
- If you want to include **Attachments**, use the **Choose file** feature to search and select files.
- Review the list of names receiving the message and remove any names by clicking on the box next to the name.
- Once you select **Schedule message**, the message will be sent within the next ten minutes.
- If you want to cancel the message before it is sent, click on **Check status and view history of emails sent** and click on **Cancel** under the "Status".

# Naviance Succeed

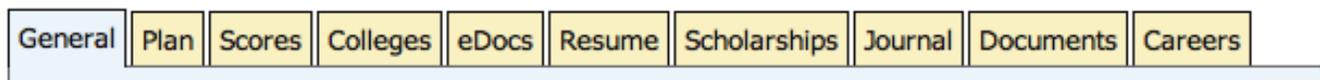
## *Students – Highlighted Features*

- Notice the 8 main tabs of Naviance Succeed along the top:



- Click on **Students** and using **Last name** or **Student ID** in the left hand column look up a student.
- Under the student's name, notice the ten tabs of information about the student:

### **Nancy L. Davis Class of 2006**



Here are a few popular features for counselors:

#### General

- Look up general biographical information such as parent name & contact information
- Look up student weighted and unweighted GPA
- Email a student. Simply click on the email address listed in the personal information at the top of the page.

#### Plan

- Review a student's responses to surveys, such as the Gameplan survey. Simply click on the survey name to see the results.
- Review the results of the student's Myers Briggs Personality test, by clicking either **View full report** or **Quick explanation**. There is also a brief summary of student's strengths, blind spots, learning strategies and communication strategies based on the personality test.

#### Scores

- Lists the student's Explore, Plan, and ACT results. The IACT is not included.

#### Colleges

- **Active Applications** lists the colleges where the student is sending transcripts.
- **Prospective Colleges** are schools that the student has entered in Family Connection's "Colleges I'm thinking about".
- **Comparison** contrasts the student's GPA and ACT with the averages of other Hersey students who were accepted at each of the student's prospective schools.

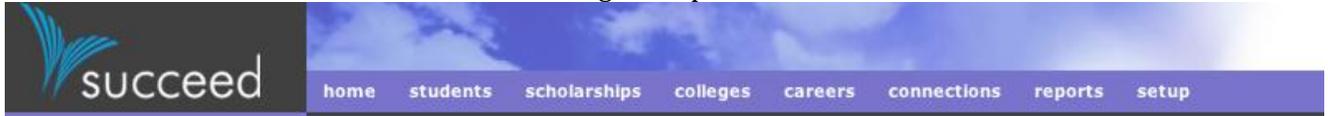
#### Journal

- Shows a list of colleges where the student has active applications. Click on a college name to view the journal entry showing the date that transcripts and other application items were sent.

# Naviance Succeed

## Student Usage Report

- Notice the 8 main tabs of Naviance Succeed along the top:



- Click on **Reports**
- In the list of *Student Reports*, next to the last report titled “*Student Usage*”, click on **Customize**.
- Under *Settings*, select the class year/grade you wish to view.

### Settings

Class Year/Grade:

class of 2013 (grade 10)



### Columns

Hold down the Command key (Mac) or Alt key (PC) to select more than one option.

#### Available

Student ID  
Senior Survey  
User ID

Add >>

Add All >>

<< Remove

<< Remove All



#### Selected

REQUIRED  
Student

Registered  
Total Visits  
Last Visit  
Game Plan



- On the left hand side of the page, be sure the *Selected* column includes *Registered, Total Visits, Last Visit and Game Plan*.

### Sorting

Sort by:

Total Visits

Descending

And then by:

N/A

Ascending



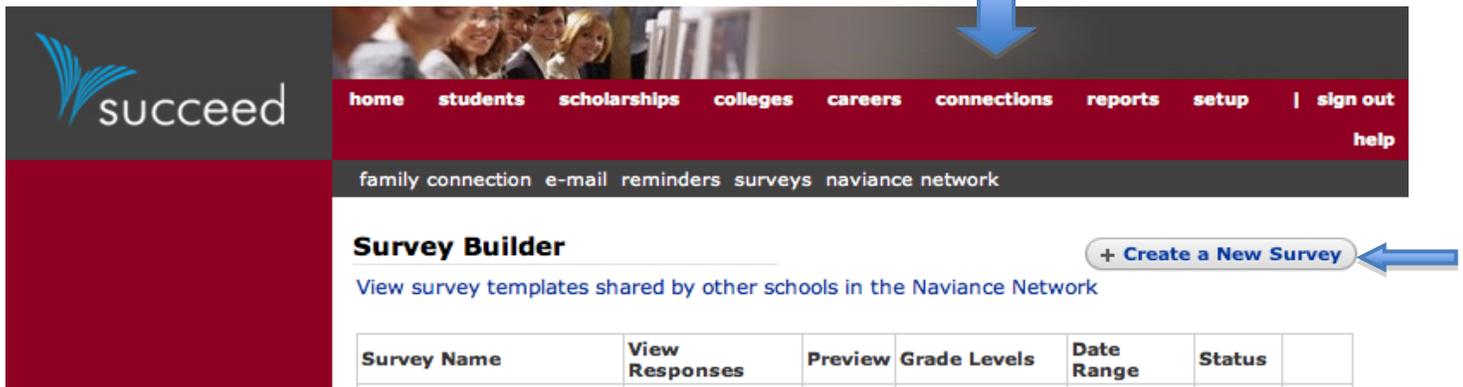
- If these items are listed under the

*Available* column, click on the item you wish to move to *Selected* and then click **add**. This will move them to the *Selected* column.

- Underneath the columns, next to the words *Sort by*, use the toggle key to indicate you wish to sort by total visits and descending order.
- Hit **View Report** on the bottom right hand side of the page

# Naviance Succeed

## Create a Survey



The screenshot shows the Naviance Succeed website interface. At the top, there is a navigation bar with tabs: home, students, scholarships, colleges, careers, connections, reports, setup, and sign out. Below this is a secondary navigation bar with links: family connection, e-mail reminders, surveys, and naviance network. The main content area is titled "Survey Builder" and includes a sub-header "View survey templates shared by other schools in the Naviance Network". A button labeled "+ Create a New Survey" is located in the upper right corner of this section. Below the header is a table with columns: Survey Name, View Responses, Preview, Grade Levels, Date Range, Status, and an empty cell.

Survey Name	View Responses	Preview	Grade Levels	Date Range	Status	
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- Notice the 8 main tabs of Naviance Succeed along the top:
- Click on **Connections** on the right-hand side.
- Within the box of menu choices, select **Survey Builder**. Notice you can also link to this feature by selecting **surveys** in the black bar at the top.
- In the upper right hand corner of the Survey Builder, select **Create a New Survey**.
- Answer the questions on the **Add Survey** page. The required fields include the survey **Name** and the **Grade levels** that will take the survey. Other fields commonly used include:
  - **Report Level** determines whether counselors will be able to review an individual student's survey responses or whether the responses will be anonymous.
  - **Counselor** allows a counselor to create surveys exclusively for their own caseload.
  - **Start Date** and **End Date**, allow you to define a limited time when the survey will be open for viewing, for example, allowing a post guidance survey to remain open only during the guidance sessions.
  - **Instructions** allow you to write directions at the outset of the survey
  - **Ending text** allows you to write final instructions at the completion of the survey
- When you have completed the survey description, click **Create New Survey** at the bottom of the page.
- At the bottom of the **Edit Survey** page, click **Add/Edit Questions**.
- In the middle of the **Edit Survey Questions** page, under **Add/Modify a Question**, first select the **Type** of survey question from the drop down menu.
- Type in the survey question as you would like it to appear on the survey.
- Indicate if the question is required on the survey. If you indicate that the question is required, the survey will not be considered complete until the required questions are answered.

- Depending on the type of question you are designing, there maybe an additional information to input. For example, you may need to add drop down menu choices. After adding all the information about the question, click on **Add Question** at the bottom of the page.
- Continue to **Add/Edit Questions**, until you have completed the survey.
- To preview the survey you have designed, click on **Back to Edit Survey** at the bottom of the page. On the Edit Survey page, click on **Preview** at the bottom of the page.
- Once the survey is complete and has been previewed, there are several questions on the **Edit Survey** page to answer:
  - **Survey Access** determines whether survey is turned on for students to answer.
  - **After Completion** at the bottom of the page defines whether students will be able to return to the survey to complete or edit answers.
- When you are finished, click on **Update survey options** at the bottom of the page.