User Settings

Help Center Manager
1 month ago Updated

What: The **User Settings** page allows users to set some key preferences in Navigate's staff platform.

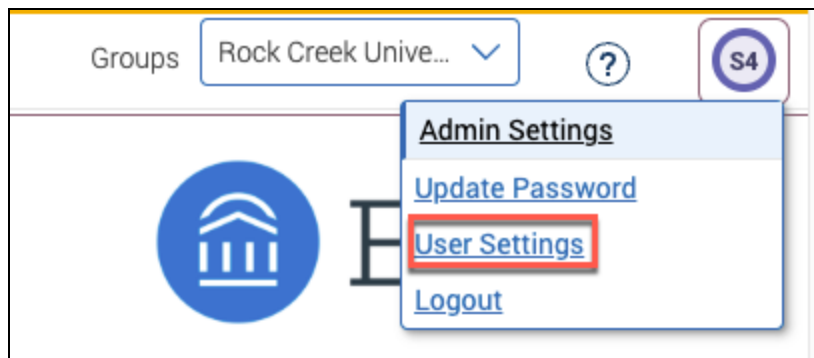**Where:** User Settings is an option in the user menu.

Who: User Settings is something all users can and should set for themselves.

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Feature Overview

The **User Settings** page allows staff users to set some key preferences and information. Open the **User Settings** page from the link in the user menu.

The **User Settings** panel opens.

User Settings   ✕

These user preferences can be updated at any time and will persist after logout.

Personal Settings

Pronouns ⓘ

| she/her   ⌄ |

Email Signature ⓘ

| **B** *I* ⋮☰ ₁☰ 🔗 | Paragraph   ⌄ | ↩ ↪ |

Default Views

Default Term ⓘ

| System Default Term   ⌄ |

Default Landing Page ⓘ

| Administration   ⌄ |

Default Student Profile Tab ⓘ

| Overview   ⌄ |

Default Care Unit ⓘ

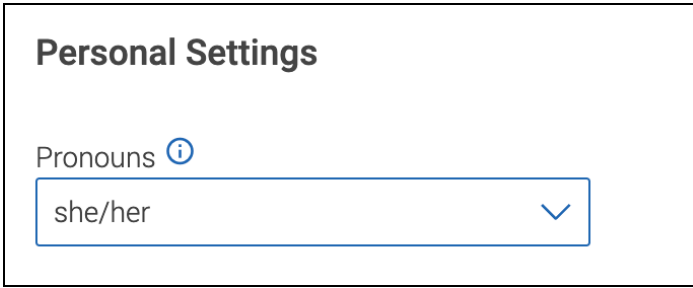| None   ⌄ |

Save   Cancel   ⑦ **Support**

Personal Settings

The **Personal Settings** section of User Settings has two settings: Pronouns and Email Signature.

Personal Settings

Pronouns ⓘ

| she/her   ⌄ |

Users can select pronouns from a list or enter custom pronouns if desired. They can also choose not to display pronouns by selecting *None*.

Personal Settings

Pronouns ⓘ

| she/her   ⌃ |

None

he/him

he/they

she/her

she/they

they/them

ze/zir

Custom
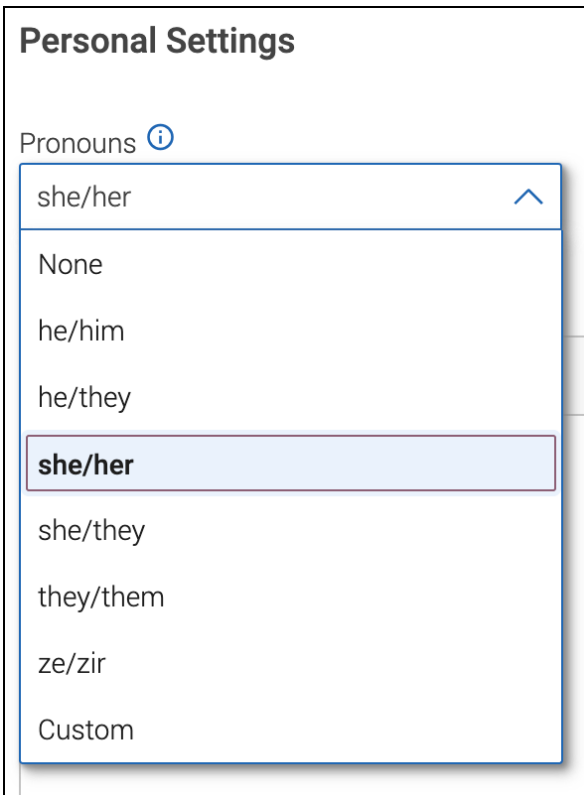
Pronouns show in user profiles, Appointment Center, staff queues, the Upcoming and Recent Appointments tables, the My Success Team table, the Student Scheduler, and all emails from Navigate.
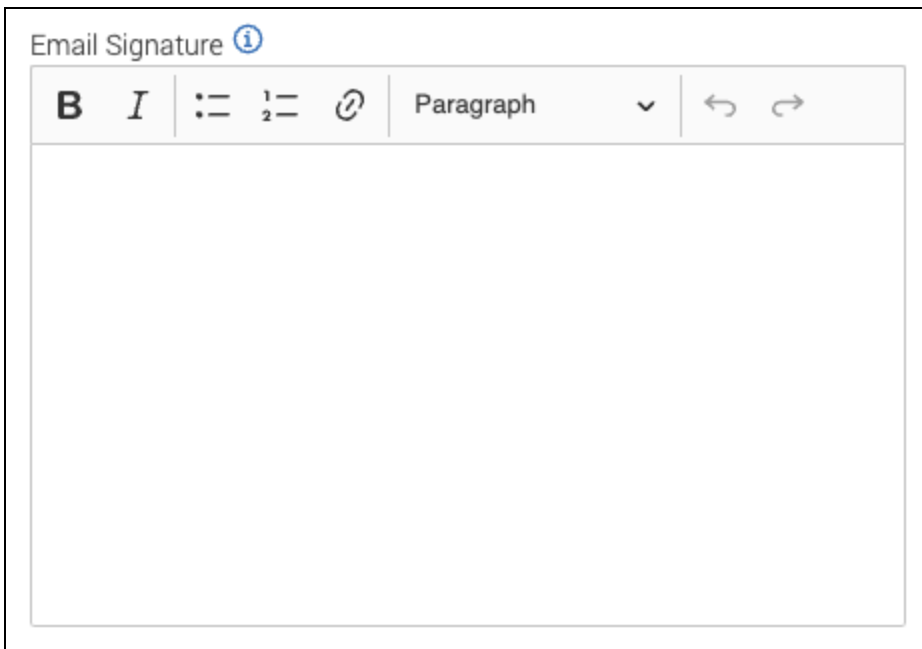
Email Signature is a rich text editor field to create an email signature for users who have message sending permissions in the platform. Once created, your signature is then available as a merge field in any **Send a Message** dialog in Navigate.

Default Views

There are up to five fields in the **Default Views** section: Default Term, Default Landing Page, Default Staff Home Tab, Default Student Profile Tab, Default Care Unit, and Default Location.

Default Views

Default Term ⓘ

| System Default Term ▾ |

Default Landing Page ⓘ

| Administration ▾ |

Default Student Profile Tab ⓘ

| Overview ▾ |

Default Care Unit ⓘ

| Academic Center for Excellence ▾ |

Default Location ⓘ

| Student Success Center ▾ |

[Save] [Cancel]

> **Note.** If you do not select a *Default Care Unit*, the *Default Location* field does not show.

The *Default Term* is used in all term dropdowns in Navigate. You can change the term using any term filter. When the default term becomes inactive, you need to update your default term.

Note. If you select *System Default Term*, it will select the "current term" that matches the following logic:

- The current date falls in the term
- If the current date falls in multiple terms, the longest term is selected as the current term
- If the current date does not fall in a term, the closest upcoming term is selected

The *Default Landing Page* sets the page in Navigate that opens when you first log into the platform. If your access to the chosen page is removed, we update your default landing page to *System Default Landing Page.* Many users will find setting a "home" page to be most useful; e.g. Staff Home or Professor Home or even Student Home. However, if you rarely use the home pages and instead spend most of your time in, for example, Analytics or Reporting, it may make more sense to set one of those pages as your default. Another example is if you spend most of your time in Advanced Search, you may want to start there and save yourself a click. Likewise, you may prefer Dashboard to one of the home pages. If you have no strong preference, you may want to choose System Default Landing Page.
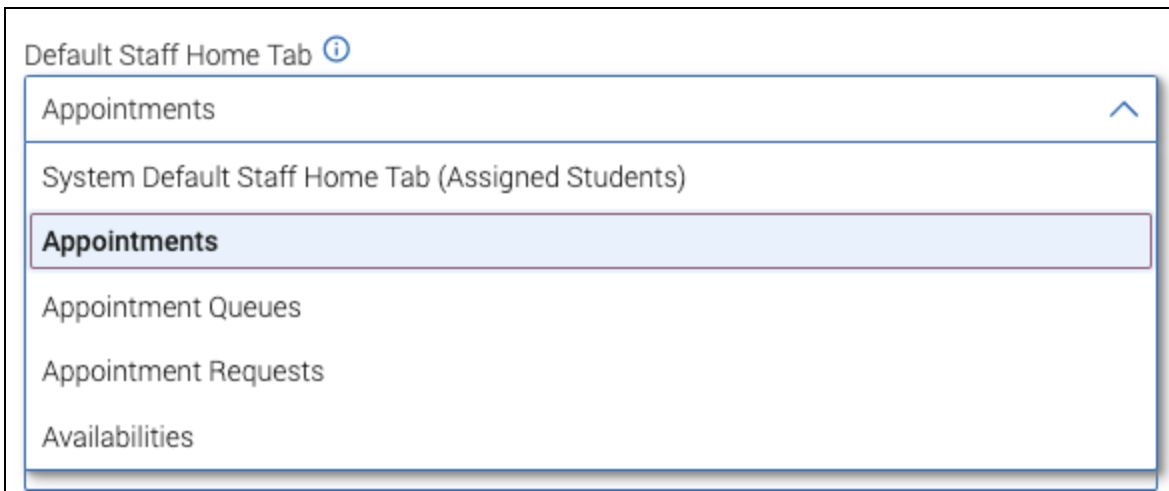
The following pages can be default landing pages; the actual list you see is determined by User Role permissions.

- System Default Landing Page – this is based on the user's current access. In order, it would be Staff Home, Student Home, Professor Home, and Administration.

- Staff Home
- Student Home
- Professor Home
- Dashboard
- Conversations
- Calendar
- Cases
- Campaigns
- To-Dos
- Advanced Search
- Lists & Saved Items
- Analytics
- Reporting
- Administration

Default Landing Page ⓘ

Staff Home ⌃

System Default Landing Page

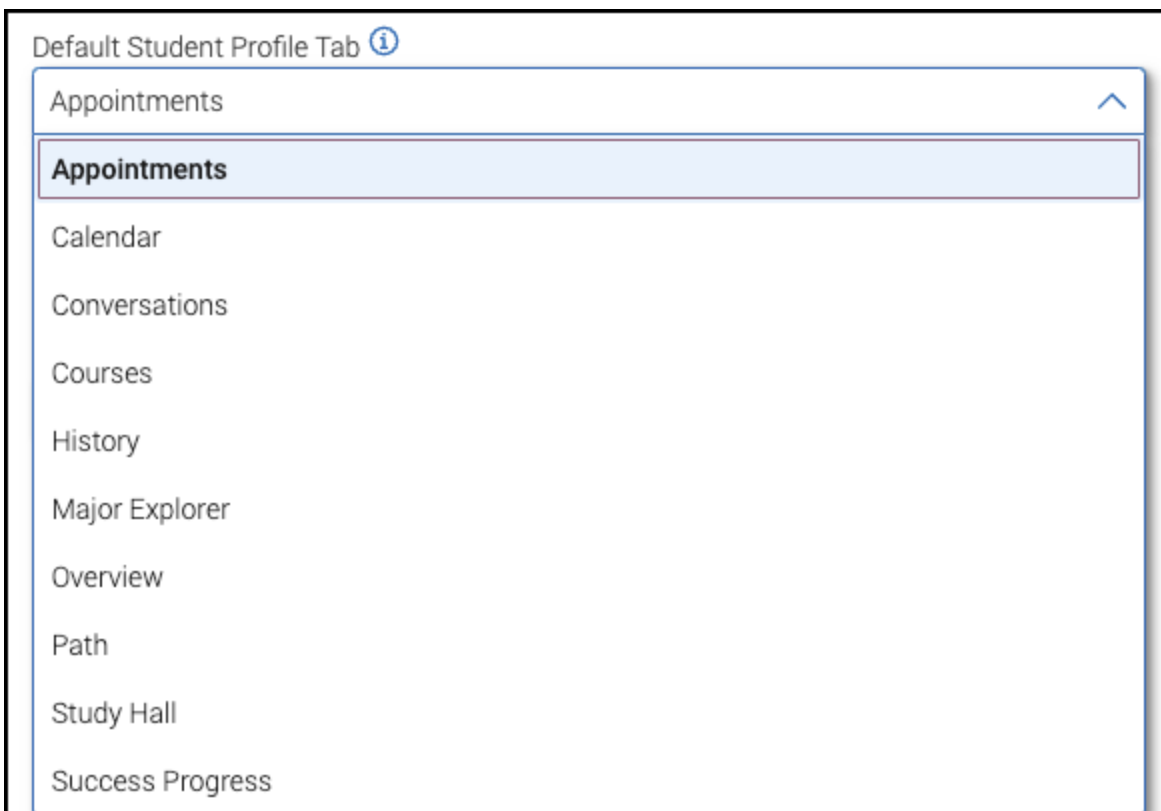**Staff Home**

Student Home

Professor Home

Dashboard

Conversations

Calendar

Cases

Campaigns

To-Dos

Advanced Search

Lists & Saved Items

Analytics

Reporting

Administration

? Support
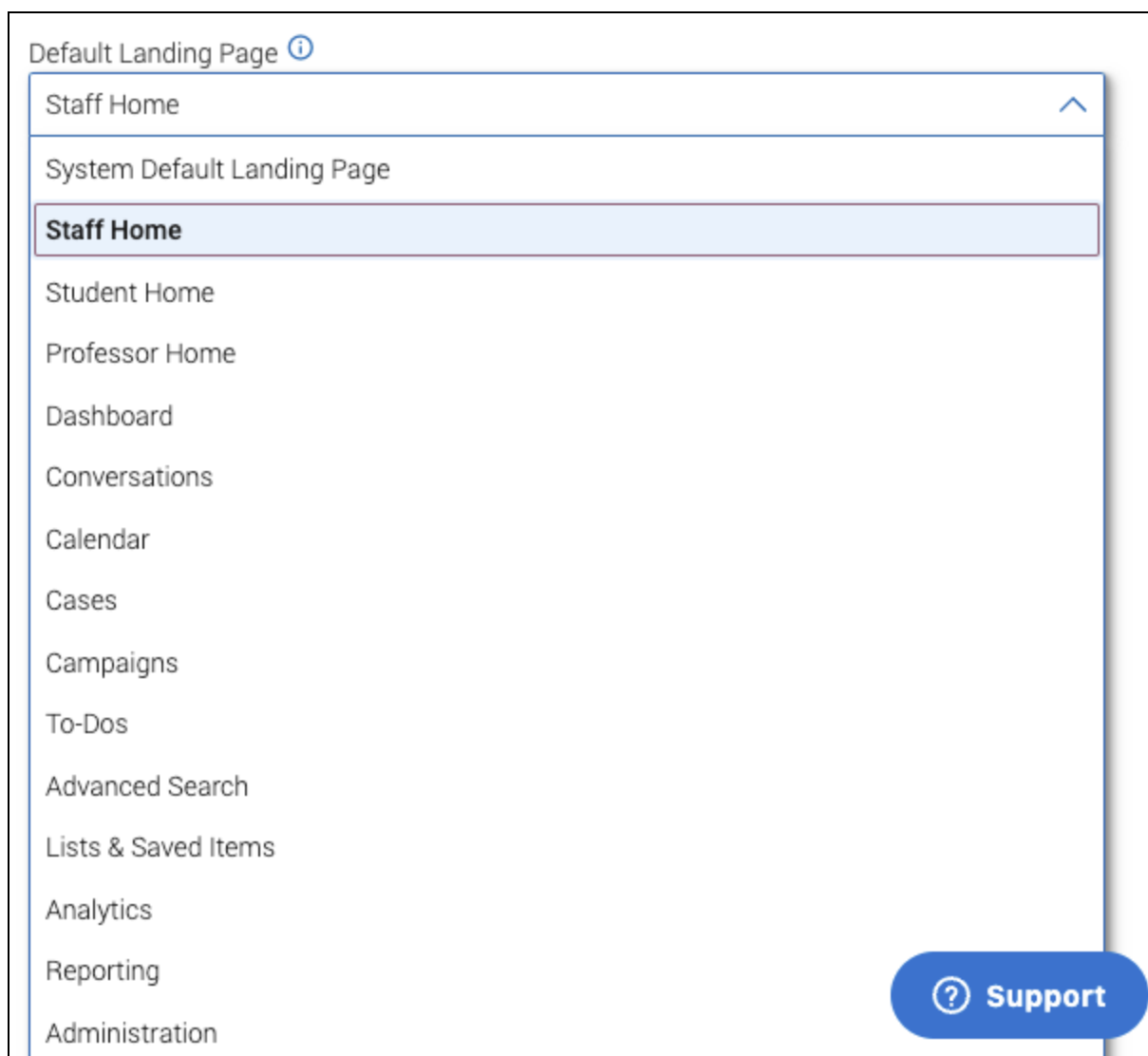
Choosing an option from the *Default Staff Home Tab* menu lets staff members open Staff Home to a particular tab.

Default Staff Home Tab ⓘ

Appointments	∧
System Default Staff Home Tab (Assigned Students)	
Appointments	
Appointment Queues	
Appointment Requests	
Availabilities	

Choosing an option from the *Default Student Profile Tab* menu lets staff members open student profiles to a particular tab, e.g., instead of opening to the Overview tab, a student profile opens to the Reports/History tab.

Default Student Profile Tab ⓘ

Appointments	∧
Appointments	
Calendar	
Conversations	
Courses	
History	
Major Explorer	
Overview	
Path	
Study Hall	
Success Progress	

Staff users will only see tabs they have permissions to see already in the drop-down menu. Academic Plan (Shared Workspace) is also not an option for default tab.

Default Care Unit lets you specify which Care Unit should be preselected for any ad-hoc Appointment Summaries. If you select a default Care Unit, the *Default Location* field appears. If you make a selection here, it will also be pre-filled in ad-hoc Appointment Summaries. These choices do not fill in for an Appointment Summary for a scheduled appointment.

Once you have changed any of these preferences, select **Save** to save the change.