

Welcome to the Naviance PowerSchool PowerUp!



PowerUPs

December 6th, 2022

Education Impact Consultants (EICs)



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Today's Agenda

- PowerUp Overview
- Naviance updates
- Single Sign On (SSO) & SAML Options
- Utilizing Groups in Naviance
- Gathering Mid-Year Data
- Q&A



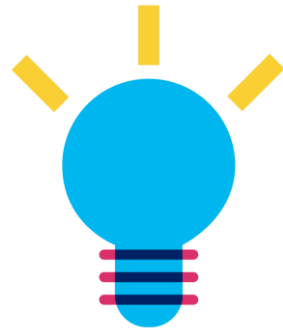
What are PowerUps?

Naviance by PowerSchool Webinars led by the EIC team

PowerSchool PowerUps – Next one January 24th, 2023



**Recurring meeting with
PowerSchool Education
Impact Consultants**



**Learn about recent
product releases,
roadmap, & integrations**



**Hear from PowerSchool
experts on seasonal,
best practice topics**



**Collaborate, network,
and share best practices
with other
PowerSchool districts**

PowerUp Communication through PowerSchool Community

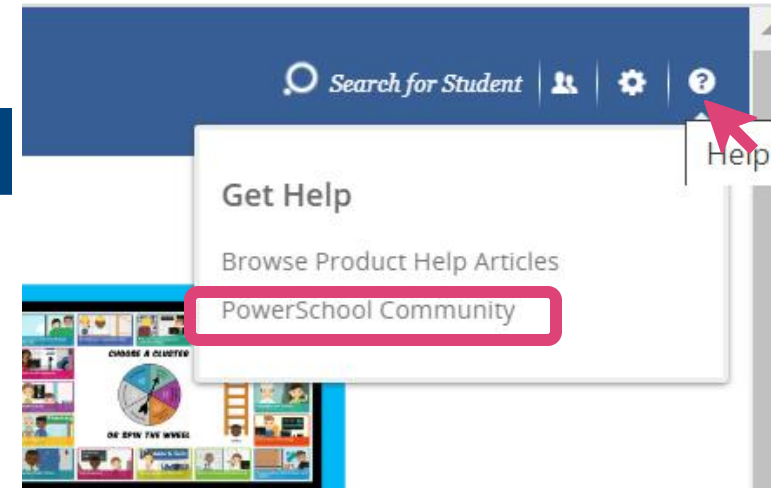
- **Naviance Forum** in PowerSchool Community



Welcome to the PowerSchool Community!



	Naviance Forum	251 POSTS	10-25-2022 09:17 AM
	Naviance Knowledge Base	284 POSTS	10-21-2022 03:57 PM
	<u>Naviance Product Updates</u>		
	Naviance Clever Integration Form		



PowerSchool Community
Product Support ▾ Product Roadmap ▾ Services ▾ Contact Support ▾ Our Community ▾ Events Hub ▾ PeopleAdmin ▾ My Contacts

Race vs Ethnicity in Naviance
by MeaghanWhitten1 on 10-24-2022 08:56 AM

EDocs will not send my School Report.
by DWelsh on 10-21-2022 12:20 PM • Latest post on 10-21-2022 09:56 PM by marthadevries

Notifications
by mmccorstin on 10-21-2022 01:06 PM • Latest post on 10-21-2022 06:52 PM by ParitoshT

Disregard..Teacher Rec not submitting for Northwestern - No error, submitted for all other schools
by lambersonj on 10-21-2022 08:49 AM • Latest post on 10-21-2022 08:54 AM by CindyOp

Importing ACT scores
by gobrien on 10-19-2022 09:20 AM • Latest post on 10-19-2022 02:26 PM by ParitoshT

ipeterson 2
LBClark 2
lainiethomas 2

View All

Filter Results

Naviance	1
PowerUps	1
Video	1
Webinar	2

Updates

PSA: Read the Announcements & In-Product Alerts

NAVIANCE Students Planner Courses Scholarships^{New} Colleges Careers Connections Analytics

Naviance Account Management High School :: Dallas, TX :: U.S.

Announcements SHOW LESS

NOV 29, 2022
December Product Launches
December Product Launches Throughout the month of December, we will be launching a variety of exciting product enhancements. These launches include: New Help Center We will be launching a new product Help
[Read More](#)

NOV 2, 2022
Oberlin College: Updated Application Requirements
The Oberlin College college profile in Naviance was recently updated to display the correct application information for this school year: No Application Fee Teacher Recommendations: 2 min / 3 max Deadlines for
[Read More](#)

[View All Announcements](#)

COMING

Professio

PowerSch

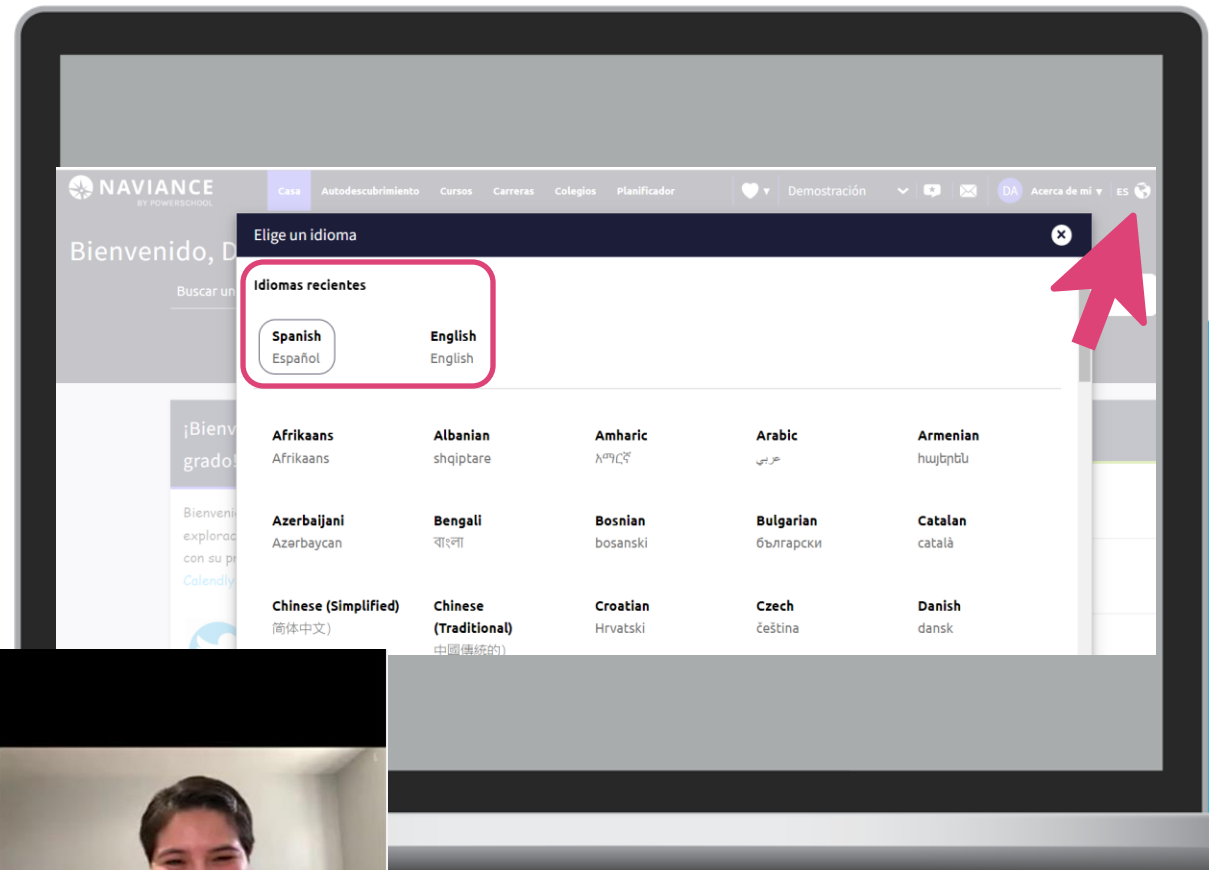
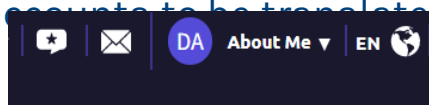
Naviance Student

Settings

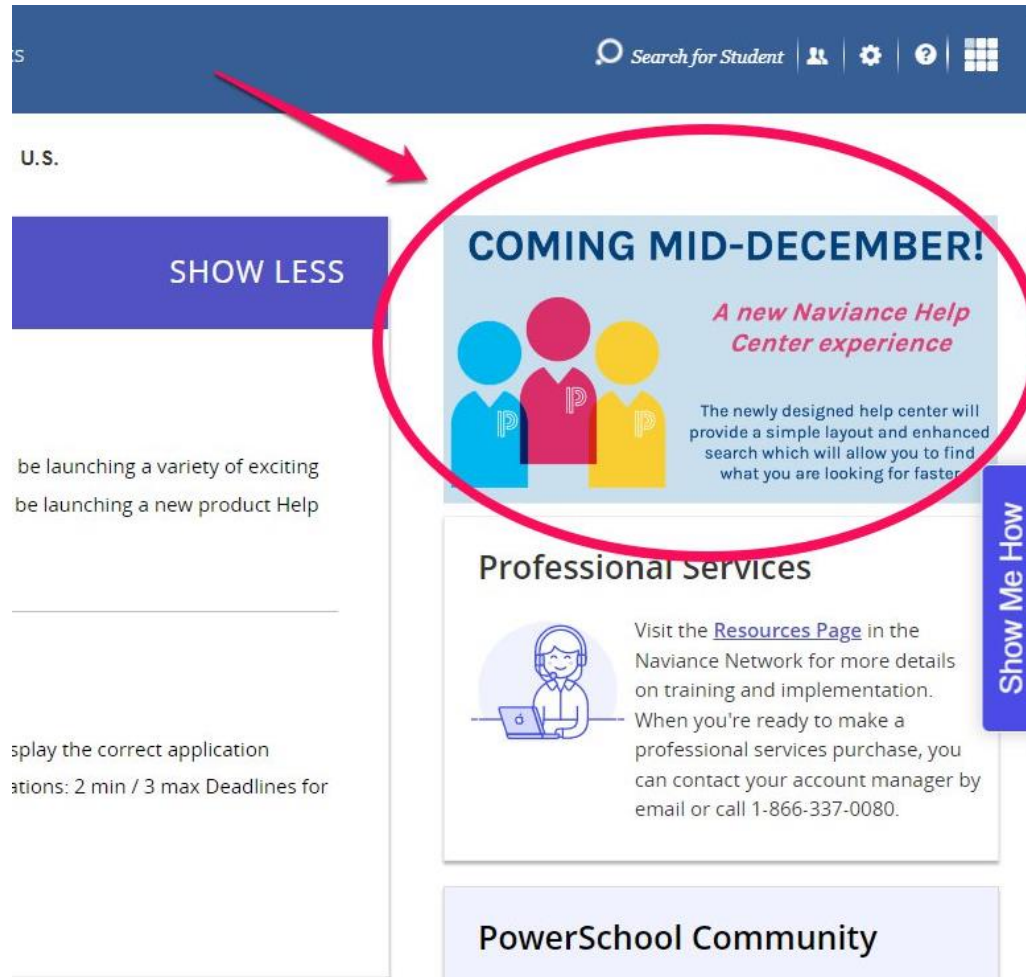
Multi-Language Support

Expanding Naviance Student reach entails:

- Ability to translate Naviance Student in **70+** languages – and save recently used languages
- The Global icon allows students and parent accounts to be translated
- Provides translation for all Self-discovery assessments except for the *StrengthsExplorer*
- Provides translation for RoadTrip Nation videos' subtitles



New Help Center Experience



- Replacing current Help Center and will live in PowerSchool Community (all users will be redirected).
- 12/14 launch date.
- Enhanced search functionality, page-by-page table of contents, and sidebar navigation.

NOTE some videos & PDFs will not be available in new experience.

PowerSchool/Naviance Staff Syncing

COMING IN DECEMBER

- Direct integration between Naviance & PowerSchool for staff syncing.
- Districts can select frequency, schools, & fields for syncing during integration.
- If currently using Clever, please contact support to disable Clever sync for PowerSchool sync.

Setting Up Single Sign-On (SSO)

& other helpful information about syncing data

Single Sign-On (SSO) for students

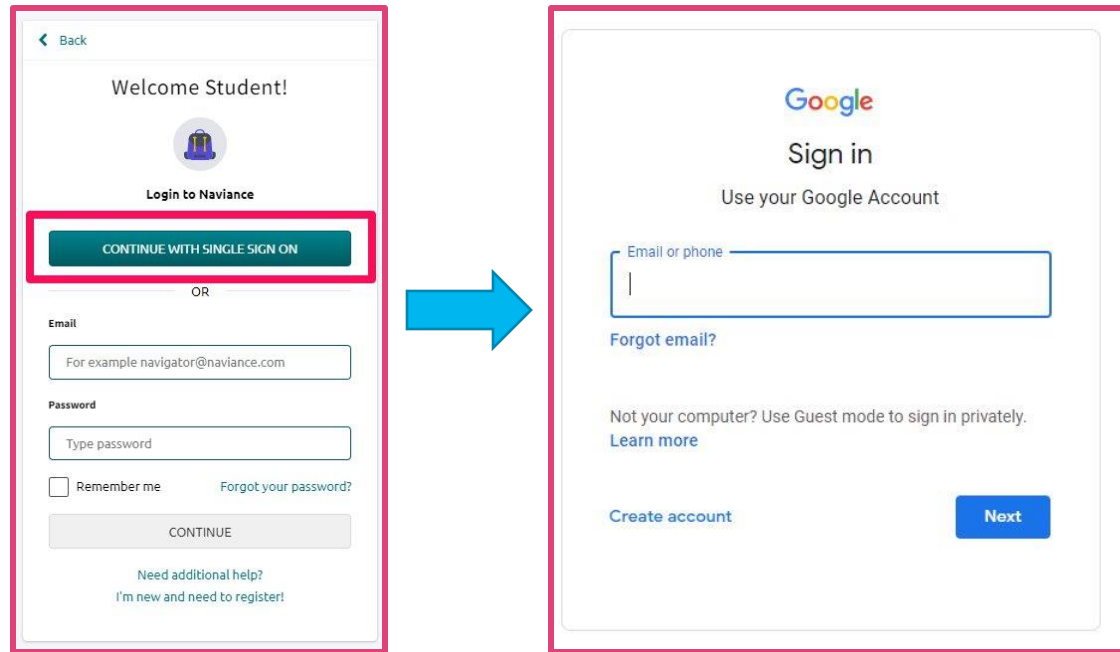
Do your students struggle with logging into Naviance?

Single Sign-On (SSO) for students

- What does this look like for students?
- How does this work?
- What do we need to have set up for this to work?
- Does this impact seniors and college applications?
- What do I communicate to my IT Department?
- Where do we go for additional help?

Single Sign-On (SSO) for students

Currently available to all schools and districts at no extra cost: the ability to set up a single-sign-on for students (EASY to set up).



You can set up an SSO via:

- Google/Gsuite SSO (see image on the left)
- ClassLink
- Your own IDP
- Most other SSO services

Single Sign-On (SSO) for students

How does this work?

- Your IT department sets up a “SAML” (pronounced “sam-EL”) connection in Naviance using the setup wizard.

Single Sign-On (SSO) for students

How does this work?

- Google, ClassLink, etc. will sync up with Naviance using students' school email addresses or another unique identifier, and students will log into Naviance using their school email address and school password – no need for a Naviance-specific username and password.

Single Sign-On (SSO) for students

What do we need to have set up for this to work?

- If your SSO platform (Google, Classlink, own IDP, etc.) syncs with students' email addresses, you'll need to make sure all students have their school email populated in the email field in Naviance & that they're registered.

****TIP**** Including usernames in your sync or import will auto register students

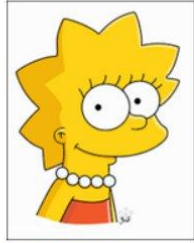
Ann A Apple
2022 (Grade 12) ID: 3212
Account Active
View as student

Assigned Counselor: Dana Bulba Contact Student: student@school.us.org

Student Profile

edit
Make inactive | Delete student

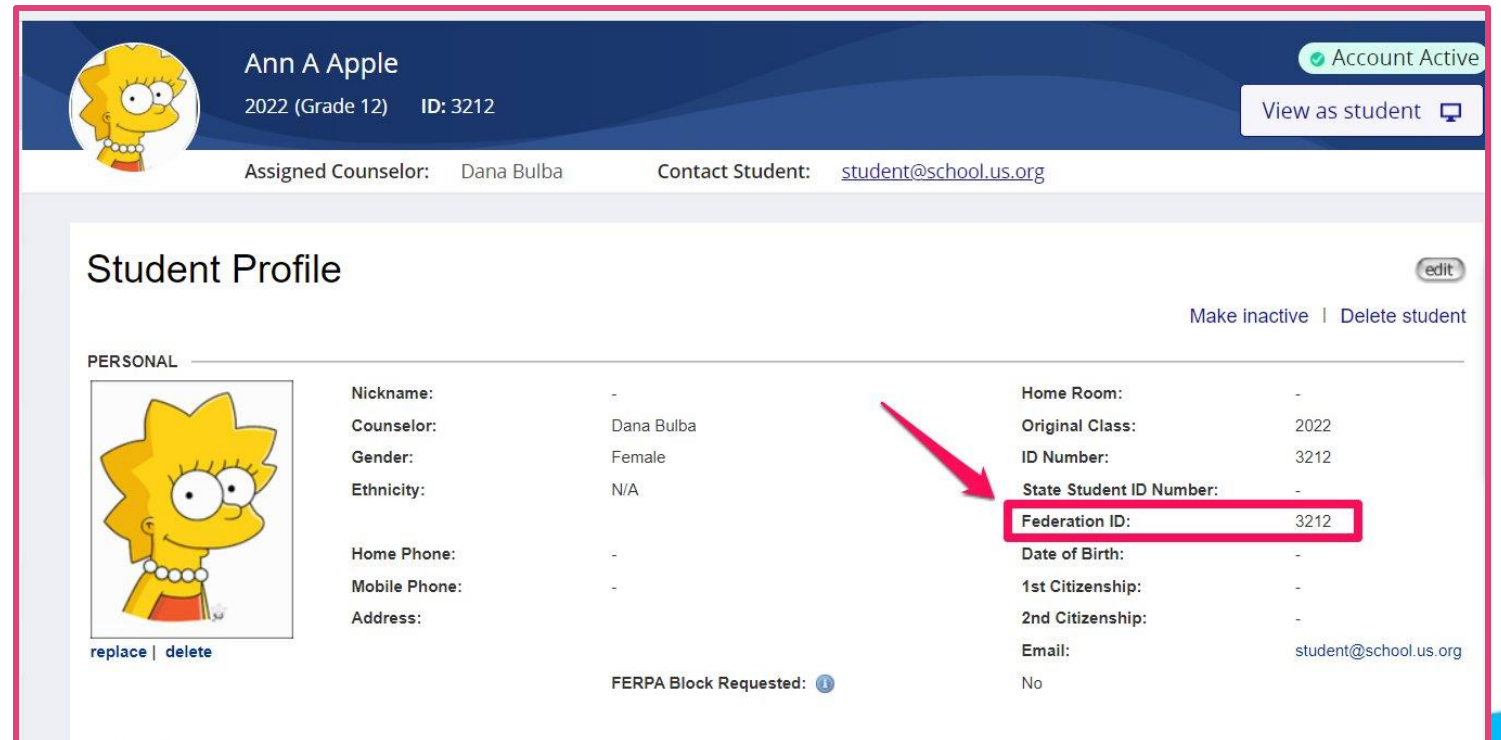
PERSONAL

 replace delete	Nickname: -	Home Room: -
Counselor: Dana Bulba	Original Class: 2022	ID Number: 3212
Gender: Female	State Student ID Number: -	Federation ID: -
Ethnicity: N/A	Date of Birth: -	1st Citizenship: -
Home Phone: -	2nd Citizenship: -	Email: student@school.us.org
Mobile Phone: -	FERPA Block Requested: ⓘ	No
Address: -		

Single Sign-On (SSO) for students

What do we need to have set up for this to work?

- If your SSO platform syncs on a student identifier other than email address, you'll need to populate the "Federation ID" field in Naviance for all students.



The screenshot displays a student profile for Ann A Apple, a 2022 (Grade 12) student with ID: 3212. The profile is managed by Dana Bulba, the assigned counselor. The student's email is student@school.us.org. The profile is active, as indicated by the "Account Active" status. The "Student Profile" section includes an "edit" button and options to "Make inactive" or "Delete student". The "PERSONAL" section contains a list of fields: Nickname, Counselor, Gender, Ethnicity, Home Phone, Mobile Phone, Address, Home Room, Original Class, ID Number, State Student ID Number, Federation ID, Date of Birth, 1st Citizenship, 2nd Citizenship, Email, and FERPA Block Requested. The "Federation ID" field is highlighted with a red box, and a red arrow points to it from the right. The value for the Federation ID is 3212.

Field	Value
Nickname	-
Counselor	Dana Bulba
Gender	Female
Ethnicity	N/A
Home Phone	-
Mobile Phone	-
Address	-
Home Room	-
Original Class	2022
ID Number	3212
State Student ID Number	-
Federation ID	3212
Date of Birth	-
1st Citizenship	-
2nd Citizenship	-
Email	student@school.us.org
FERPA Block Requested	No

Single Sign-On (SSO) for students

What do we need to have set up for this to work?

“But, we have students populate the email field with their personal email address!”

- You can populate the “Federation ID” field in Naviance with school email (keeping personal in the email field) and sync on this field.

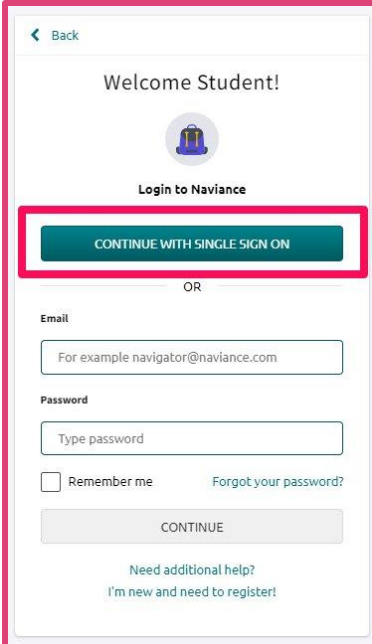
The screenshot shows a student profile for Ann A Apple, a 2022 Grade 12 student with ID 3212. The profile is managed by Dana Bulba, the assigned counselor. The contact email is student@gmail.com. The profile is active. The student's personal information is displayed, including a photo of Lisa Simpson. The Federation ID is student@us.k12.org, and the email is student@gmail.com. Red arrows point from the text 'school email' to the Federation ID field and from 'personal email' to the Email field.

Field	Value
Nickname	-
Counselor	Dana Bulba
Gender	Female
Ethnicity	N/A
Home Phone	-
Mobile Phone	-
Address	-
Home Room	-
Original Class	2022
ID Number	3212
State Student ID Number	-
Federation ID	student@us.k12.org
Date of Birth	-
1st Citizenship	-
2nd Citizenship	-
Email	student@gmail.com
FERPA Block Requested	No

Single Sign-On (SSO) for students

Does this impact seniors or college applications?

- No – this will just provide an additional way for seniors to log in.
- If you change seniors' personal email addresses to school email addresses, it will not un-match their Common App.



The screenshot shows the Naviance login interface. At the top, there is a 'Back' link. Below it, the text 'Welcome Student!' is displayed with a school building icon. Underneath is the text 'Login to Naviance'. A prominent green button labeled 'CONTINUE WITH SINGLE SIGN ON' is highlighted with a red box. Below this button is the word 'OR'. The login form includes an 'Email' field with the placeholder 'For example navigator@naviance.com', a 'Password' field with the placeholder 'Type password', a 'Remember me' checkbox, and a 'Forgot your password?' link. At the bottom of the form is a 'CONTINUE' button. Below the form, there are links for 'Need additional help?' and 'I'm new and need to register!'.

Single Sign-On (SSO) for students

What do I communicate to my IT Department?

HIGHLIGHT THAT DISTRICT SITE MANAGER NEEDS TO SEND IF DISTRICT --

To: IT Department

Subject: Set up SAML SSO in Naviance

Attachments: this PPT presentation

I just learned that we can set up a single-sign-on (SSO) in Naviance via a SAML connection at no additional cost. Currently, our students log on with a Naviance username and password - we spend a lot of valuable class time helping students with their passwords, and it would be great if we could streamline the log-on process. I was told this is relatively simple and that our IT Department would need to set this up. I want to make the most of our Naviance investment, and I am hoping you can help!

Naviance supports syncing with Gsuite, ClassLink, our own IDP, etc. - a plethora of services. Basically, we can sync on the email field in Naviance if we populate that with student email, OR we can sync on a field in Naviance called "Federation ID."

I've attached a copy of the presentation that outlines the requirements for setting this up (how the sync works, how students would log in, and what fields need to be populated).

We first need to verify that all student information is in the system to allow for the sync (see attached). Once this is updated and/or confirmed, you will need to: log into Naviance >> Gear Icon in top right >> Setup >> Single-Sign-On (SSO) Options >> Configure button to the right of SAML SSO >> Add SAML connection >> walk through set-up wizard for students.

There are complete instructions in the Help Center as well (question mark in top right >> PowerSchool COmmunity). And, the PowerSchool Support Team can also assist (contact them within PowerSchool Community ... need to access via your Naviance account).

Please let me know if this is possible.

Thank you!

Data Imports

If you use PowerSchool SIS, you can set up a sync between Naviance & PowerSchool (no need to manually import data)!

- This integration is available for all Naviance clients that also use PowerSchool SIS (no additional cost)!
- This integration capability is a district-level feature. If you have a school account only, contact your Customer Success Manager to get a District account.
- Currently ONLY student and alumni records are available for import from the SIS. This integration will eventually be available for other data types, such as parent, staff, and course planner data. STAFF SYNC COMING IN DECEMBER!!
- Data flows from your SIS to Naviance (it does not flow from Naviance to PowerSchool).

Data Imports

How do we set this up?

- You will need to contact your IT Department.
- Provide them with the Quick Guide, Reference Guide, Video, and import template found in the Help Center:
 - Search PowerSchool SIS Integration for these documents ****DOWNLOAD BEFORE 12/14****

Data Imports

“What if we don’t use PowerSchool?”

- You can still set up a sync with Naviance to auto populate your data at no additional cost.
- BUT, you’ll need to connect with your IT Department to see if they have familiarity with any of the following:
 - cURL (pronounced “curl”) statements.
 - Clever syncs.
 - (In case your IT Department asks about SFTP, we do not support this.)
- Search the Help Center for “cURL” and “Clever” for more information.

Groups in Naviance

- *What are groups & how are they used in Naviance?*
- *How do I view a Student Group?*
- *How do I add/remove students from a Group?*
- *How do I create a custom Group?*
- *How can I use these groups for analytics & communication purposes?*

What are Groups & How are they used in Naviance?

- Groups are used to categorize students for analysis & communication purposes.
- Group students by FRL, athletes, non-native English speakers, etc. (an unlimited # can be created).
- Create at school or district level.
- A mass manual import or cURL import can update groups (not currently supported via Clever or PowerSchool sync).

ner Courses Scholarships ^{NEW} Colleges Careers Connections Analytics

SA Sam Acorn
2023 (Grade 12) ID: 999999933

Assigned Counselor: Maria Arrazola Contact Student: samacorn@gc

Student Profile

PERSONAL

Nickname:	-
Counselor:	Maria Arrazola
Gender:	-
Ethnicity:	N/A
Home Phone:	-
Mobile Phone:	-
Address:	
Photo:	add a photo

ACADEMICS

Cumulative GPA:	-
Class Rank:	1/14
Program Strength: ?	N/A
Graduation Date:	-

GROUPS

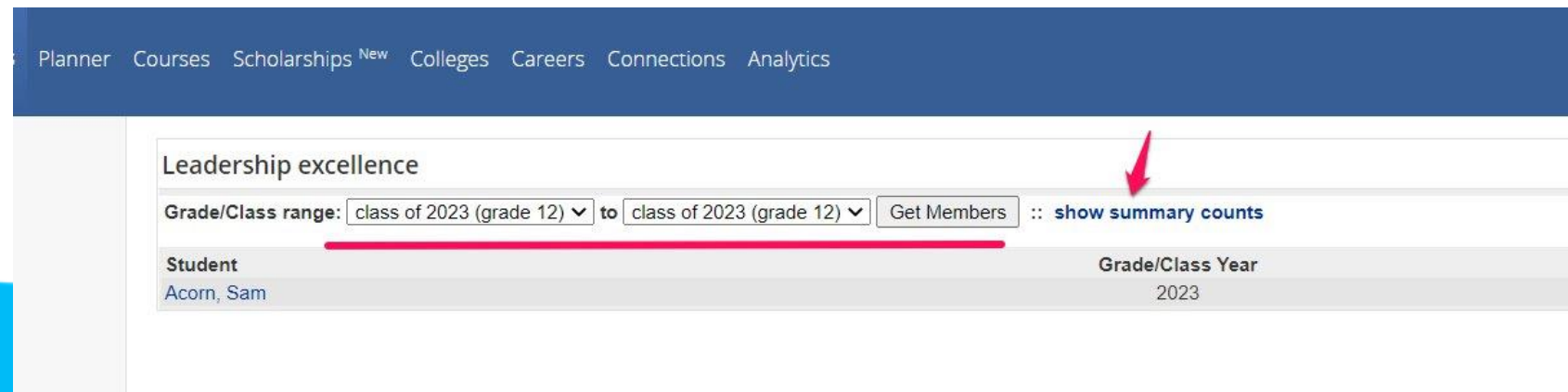
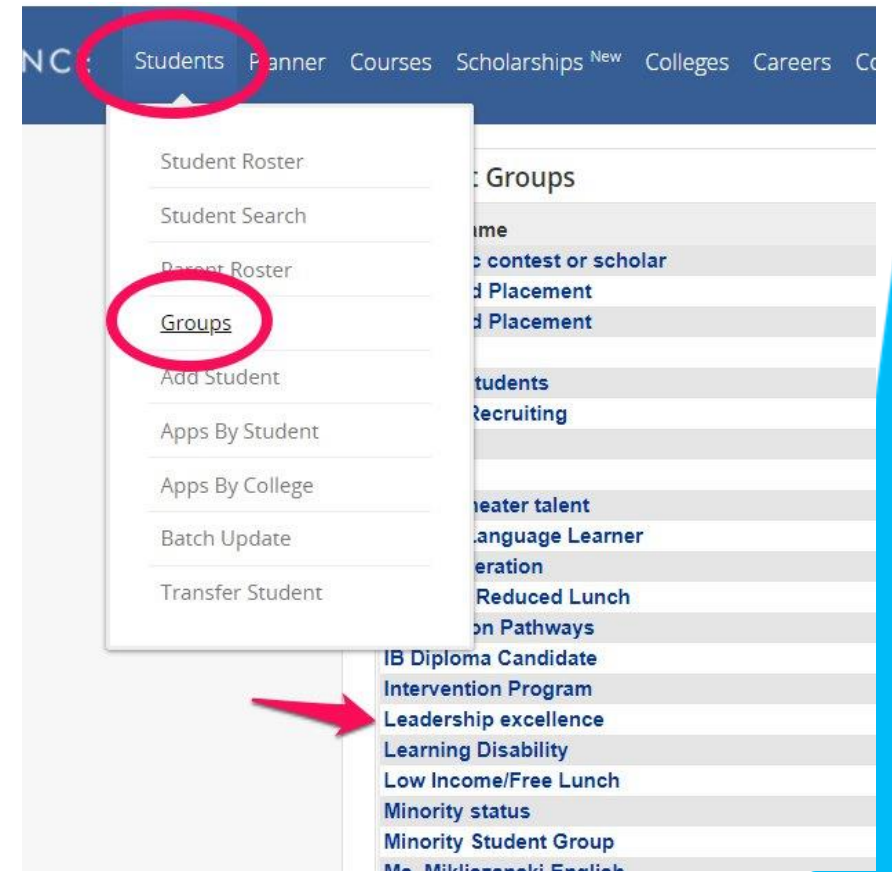
- Student Athletes (ATH)
- Leadership excellence (LEAD)
- Ms. Mikiszanski English (MIK)

PARENT INFORMATION [+](#)

NAVIANCE STUDENT

How do I view a Student Group?

- Navigate to **Students > Groups**.
- Click on the **Group Name**.
- Change the **Grade/Class** range using the drop-down menus options to the grade levels that have been added.
 - For example, "Class of 2015 (grade 12) to class of 2018 (grade 9).
- Click **Get Members**.



How do I add/remove students from a student group?

OPTION #1

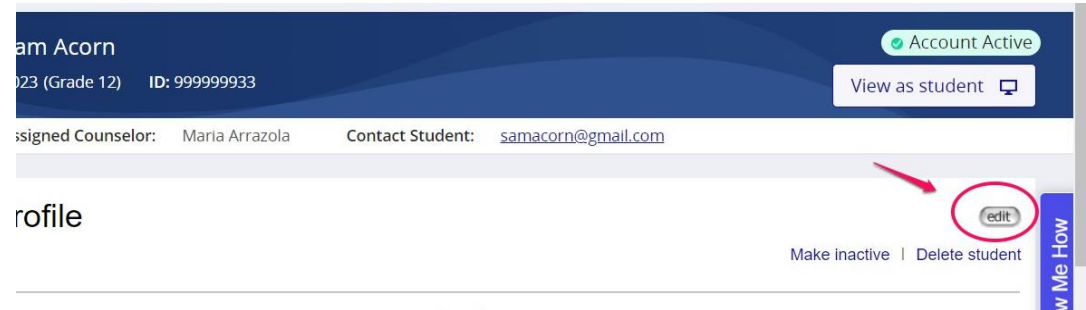
- Navigate to **Students > Groups**.
- Press edit Group Members > add/remove



Group Name	Code			
Academic contest or scholar	ACAD	edit name	edit members	delete
Advanced Placement	AP	(district group)	edit members	
Advanced Placement	AP	edit name	edit members	delete
At Risk	AR	(district group)	edit members	

OPTION #2

- Navigate to a Student Folder > **edit** button > select or deselect > **save**



am Acorn Account Active

023 (Grade 12) ID: 999999933 View as student

Assigned Counselor: Maria Arrazola Contact Student: samacorn@gmail.com

rofile edit

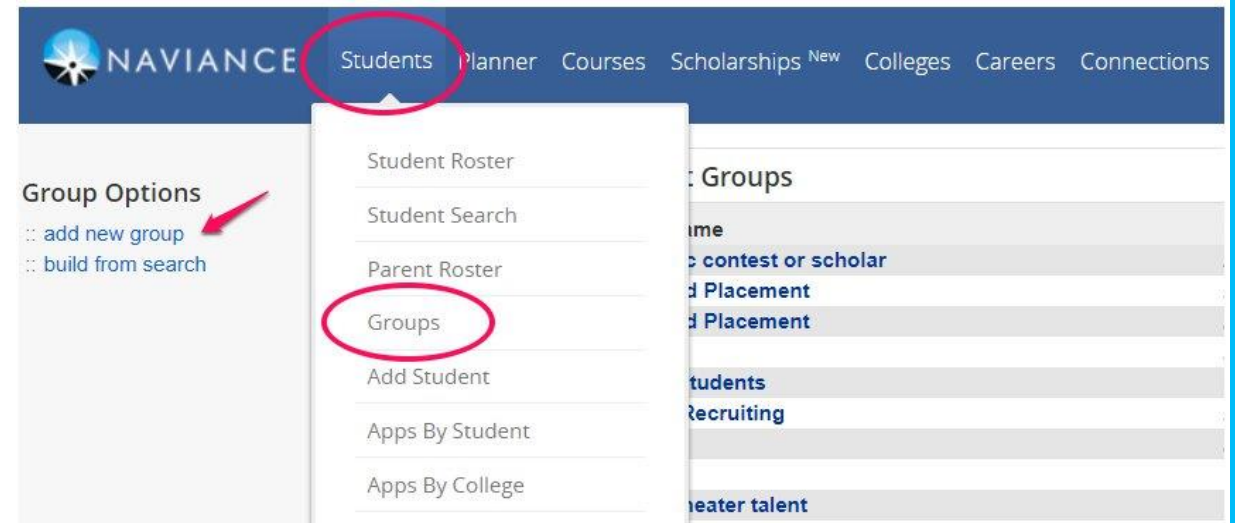
Make inactive | Delete student

OPTION #3

- Update via mass import or cURL statement using Group Codes

How do I create a custom group?

- Navigate to **Students > Groups**.
- Click **Add New Group** from *Group Options* on the left of the page.
- In the **Code** field, type an **abbreviation** for the group.
- In the **Name** field, type a **descriptive name** for the group.
- Click **Add Group**.
- Click **Edit Members** to select students that should belong to this group.

A screenshot of the 'Add Student Group' form. It contains two input fields: 'Code:' with the value 'FRL' and a red note '(codes cannot include quotes, apostrophes or spaces)'; and 'Name:' with the value 'Free & Reduced Lunch'. Below the fields are two buttons: 'Add Group' and 'Cancel'.

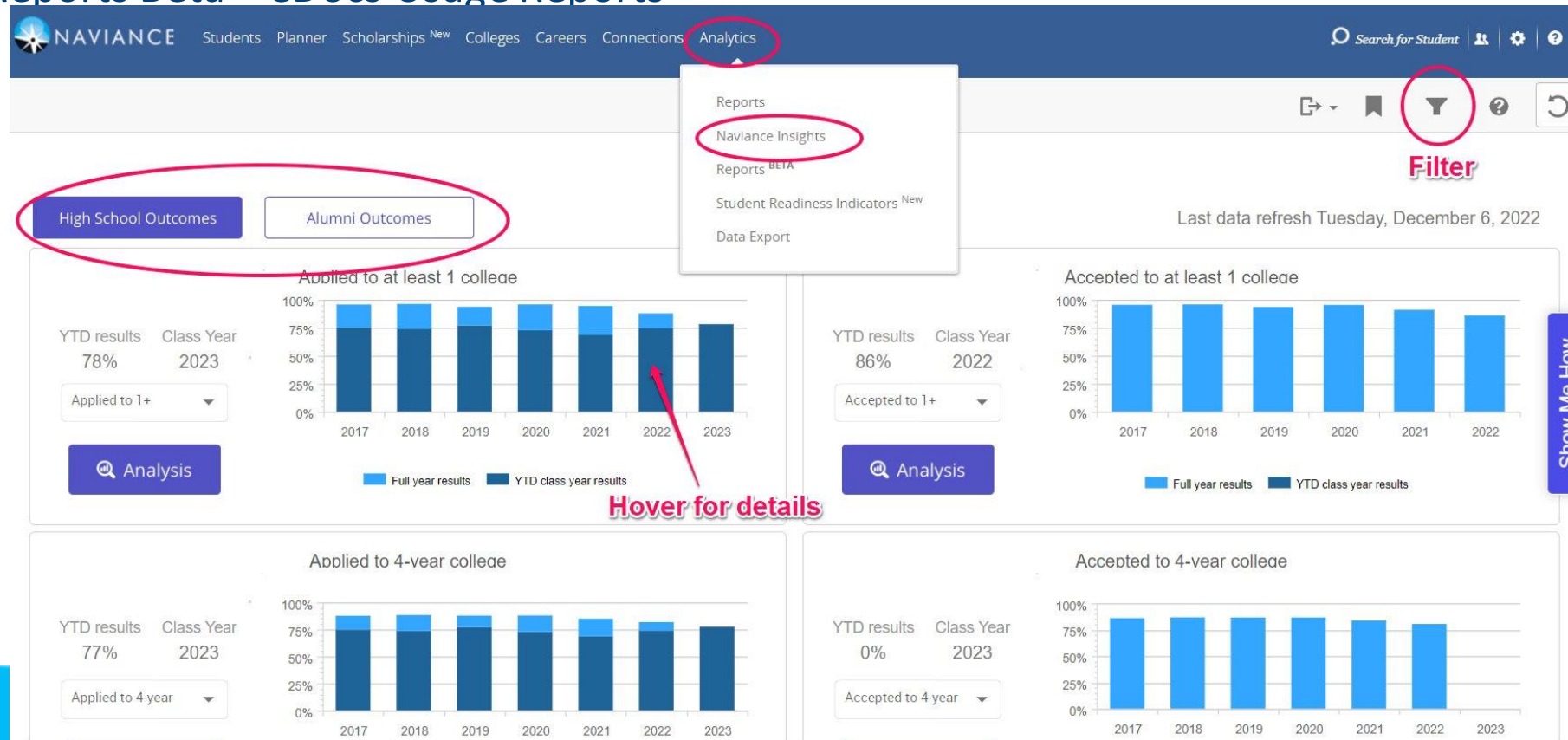
How can I use groups for analytics & communication?

- Send emails to students (and/or their parents) in specific groups.
- Assign tasks/programs to specific groups.
- Run reports & use group filter.

Mid-Year Reporting

College Application Data

- Quick Links > Application Manager > Summary & History
- Analytics > Naviance Insights
- Analytics > Reports Beta > eDocs Usage Reports



- Analytics > Reports Beta > eDocs Usage Reports

NAVIANCE Students Planner Scholarships ^{New} Colleges Careers Connections Analytics Search for Student

This is the new BETA Naviance Reports

Naviance Home / All Reports / eDocs Usage Report

eDocs Usage Report

Details → [View College Applications Report](#) [View Outcomes Report](#)

= Grade 12 (2023)

Last data refresh Monday, December 5, 2022

eDocs Usage Charts **eDocs Usage Details**

Filters
Additional filters can be found in the funnel icon at the top right of the page.
To select multiple filter options use the maximize icon next to Search.

Class Year
Grade 12 (2023)

Metric	Value
# of documents submitted	1,653
# of LORs submitted	141
# of Transcripts submitted	105
# of Common App Documents submitted	1,102
# of Parchment Documents submitted	463

eDocs Submission by Document Chart

The number of eDocs submissions by document type

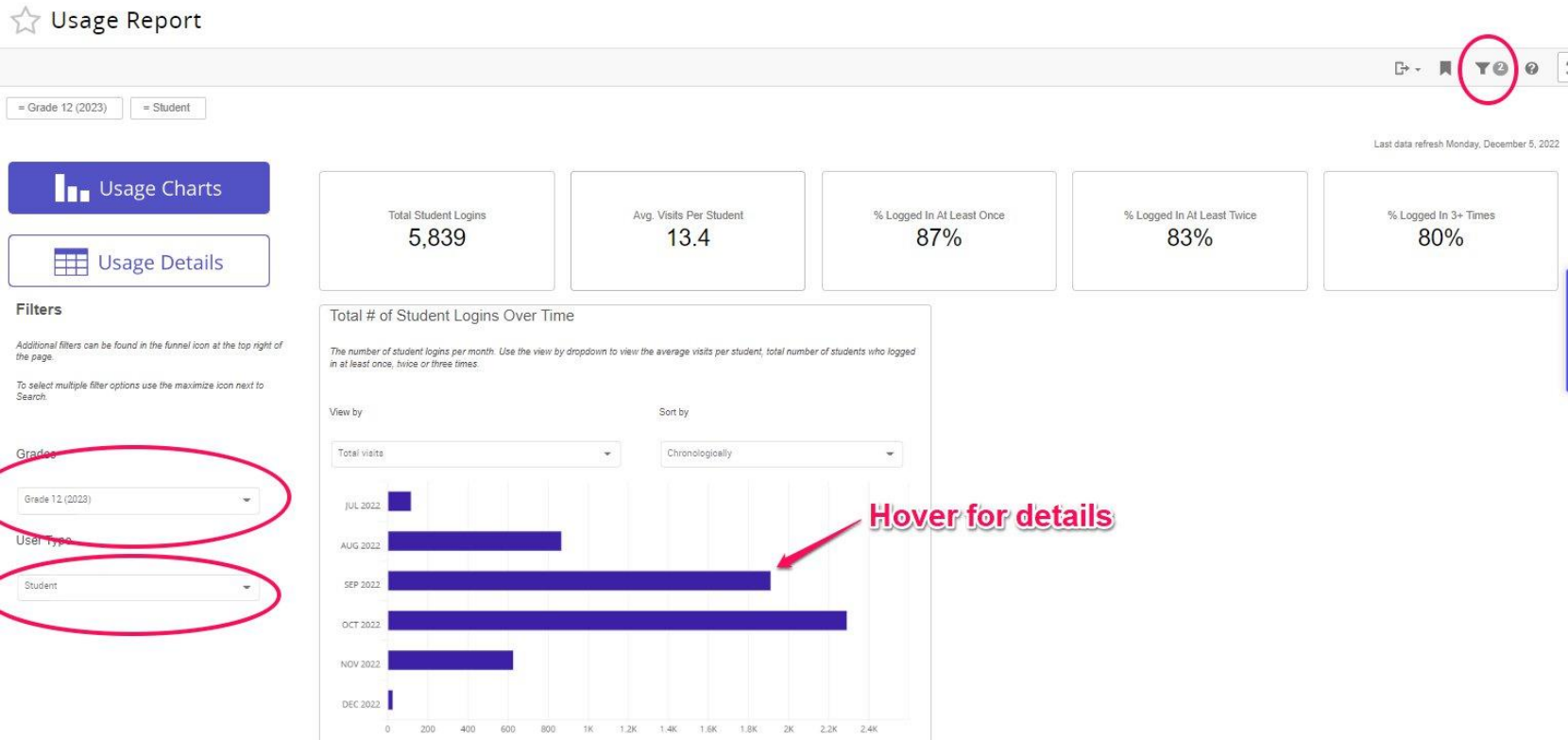
Sort by: Highest to lowest

Document Type	Submission Count
Common App Teacher Eval	~1,100
Common App Counselor Recommendation	~1,000
Common App School Report	~1,000
Letter of Recommendation	~140
Initial Transcript	~100

Show Me How

Student Usage

- Analytics > Reports Beta > Usage Report



COMING SOON

Year-Over-Year usage for staff and students will be added into this report. District & school reports will display usage for the current academic year plus two previous academic years.

Assessment Status Reporting

- Analytics > Reports Beta > Assessment Status Report

Naviance Home / All Reports / Assessment Status Report

☆ Assessment Status Report

Grade 12 (2023)

Last data refresh Saturday, December 3, 2022

Assessment Status Chart

Completed At Least One Assessment: 92%

At Least One Assessment In-Progress: 26%

Not Started Any Assessment: 8%

Assessment Status Details

Filters

Additional filters can be found in the funnel icon at the top right of the page.

To select multiple filter options use the maximize icon next to Search.

Class Year: Grade 12 (2023)

Assessments: Select Assessments

Assessment Status

Use the dropdown to view the percent of students who completed assessments, are in progress, or not started their available assessments

View by: % Completed | Sort by: Highest to lowest

Assessment	% Completed
Career Key	75%
Career Cluster Finder	70%
Strengths Explorer	68%
Career Interest Profiler	15%
AchieveWorks Personality	12%
AchieveWorks Intelligences	5%
AchieveWorks Skills	3%
AchieveWorks Learning and Prod...	2%

Show Me How

Other Beta Reports Available

- Analytics > Reports Beta

Report Title ?	Category
Alumni Report	Alumni
Assessment Status Report	Assessment
Career Interest Report	Careers
College Applications Report	College
Curriculum Usage	Curriculum
eDocs Usage Report	College
Outcomes Report	College
Program Completion Report	Planner
Scholarship Report	Scholarship
Task Completion Report	Planner
Test Score Summary Report	Test Scores
Usage Report	Usage

Contacting Support, Help Center, & Other Resources

• Help Center

- Question mark in top right >> Browse Product Help Articles UNTIL DECEMBER 14th ONLY
- SOON will live in PowerSchool Community

• PowerSchool Support

- Open a case or CHAT live within the PowerSchool Community
- 866-337-0080 option 2

• Webinars

- PowerUps
- Free Webinars – register within your Naviance Accounts

The screenshot displays the PowerSchool Community interface. At the top, there is a navigation bar with links for 'New', 'Colleges', 'Careers', 'Connections', and 'Analytics'. A search bar labeled 'Search for Student' is on the right, along with user and settings icons. A question mark icon in the top right corner is circled in red, with a dropdown menu showing 'Get Help', 'Browse Product Help Articles', and 'PowerSchool Community'. Below this, the page shows a header for 'Management High School :: Dallas, TX :: U.S.' and a 'SHOW LESS' button. A red arrow points to a '2022 Fall Webinar Series' banner with a 'CLICK HERE TO REGISTER' button. Below the banner, there is a 'Professional Services' section. The bottom part of the screenshot shows the 'Naviance' section with a search bar and a 'Welcome to the PowerSchool Community!' message. Below this, there are icons for 'Getting Started', 'Launch Chat', 'Case Portal', 'Ideas Portal', 'Roadmap', and 'Events'. A 'Success with Naviance: 2022 Fall Webinar Series' banner is also present. At the bottom, there is a table of activity:

Category	Posts	Last Activity
Naviance Forum	84	08-29-2022 12:39 PM
Naviance Knowledge Base	137	08-30-2022 08:25 AM
Naviance Product Updates	1	06-09-2022 12:32 PM

A chat window is visible in the bottom right corner with the text 'I'm here to help! Click to start a chat.'

Best Practices: How to Submit a Ticket



Video Tutorial: Support Options in Naviance

P People Impacted

- What are the names, roles, and email addresses of the impacted user(s)?
- How many people are impacted? Is this just one student? Multiple students in one course? All teachers in your organization?

L Links

- Provide links to where the issue is occurring
- Provide the step-by-step clicks you took to view the behavior or error

E Expected Behavior

- What are you trying to accomplish? What are you expecting to see occur?

A Actual Behavior

- What is *actually* happening? What is the problem or question?

S Screenshots/Screencasts

- The more visuals, the better!

E Effect on workflow

- How does this inquiry affect your workflow?
- Does the issue interfere with daily tasks?
- Are there any deadlines that are threatened by the issue? Are grades due? Is there a scheduled test?



Next Steps

Connect with colleagues in PowerSchool Community Page

Updates will be shared by EICs via in the PowerSchool Community Page

Email reminder to join our next PowerUp Meeting

Register for Upcoming PowerUps within the PowerSchool Community!



PowerSchool