

Administrative Workflows

- ☐ Following forms will be used by campus site administrator to report data/system issues and requesting categories for their campus:

Data issue reporting

- ☐ With your local helpdesk open a CRM with
 - Data Issue Form
 - CRM should include the form, expected value as well as the currently displaying value and URL (if possible) to allow for troubleshooting. Once submitted, form will be routed to Office of University Registrar who will work with CIS/EAB team to triage and resolve reported issue(s). ***Estimated Timeframe for resolution: 14-20 business days.***

Example CRM Case Information Screen

Case

Save 360

Personalize

Case ID 488315

Status Open

Customer [Vivek Upadhyay](#)

Summary

Contact Method [Vivek.Upadhyay@cuny.edu](#)

Open Cases 43

Case

Solution (0)

Summary

Notes (0)

Case History

Related Cases (0)

Customer Information

Customer [Vivek Upadhyay](#)

Department UAPC

Location CENTRAL OFFICE

Contact Method [Vivek.Upadhyay@cuny.edu](#) [Edit](#)

Email [Vivek.Upadhyay@cuny.edu](#)

[Search Again](#)

Problem Information

*Problem Summary

EAB Access Request - ID 12345678

Description

form attached.

Actions

Suggested Action

Description

Save Case Find Solutions Escalate Case

Case Information

*Business Unit Central Office

Quick Code

*Case Type Application Issue

*Case Subtype Application Error

*Case Status Open

☐ Resolved by First Contact

*Provider Group CIS Student Records

Assigned To

*Category EAB - Navigate

*Specialty Type Access

*Detail N/A

Case Priority Medium

*Case Severity

*Source

Change requests

- ☐ With your local helpdesk open a CRM with
 - Change Request Form
 - Once submitted, form will be routed to Office of University Registrar who will work with CIS/EAB team to triage and resolve reported issue(s). ***Estimated Timeframe for resolution: 30-35 business days.***

Example CRM Case Information Screen

Customer Information	Case Information
Customer Vivek Upadhyay Department UAPC Location CENTRAL OFFICE Contact Method Vivek.Upadhyay@cuny.edu Edit Email Vivek.Upadhyay@cuny.edu <input type="text"/>	*Business Unit Central Office <input type="text"/> Quick Code <input type="text"/> *Case Type Application Issue <input type="text"/> *Case Subtype Application Error <input type="text"/> *Case Status Open <input type="text"/> <input type="checkbox"/> Resolved by First Contact
Problem Information *Problem Summary Change Request <input type="text"/> Description form attached.	*Provider Group CIS Student Records <input type="text"/> Assigned To <input type="text"/> *Category EAB - Navigate <input type="text"/> *Specialty Type Change Request <input type="text"/> *Detail N/A <input type="text"/> Case Priority Medium <input type="text"/> *Case Severity <input type="text"/> *Source <input type="text"/>
Actions Suggested Action Description	

Category Requests

If Navigate users want to create a new category they should discuss the reason or need for the category with campus academic leaders who will then make the decision to request the new category.

- With your local helpdesk open a CRM with
 - Category Request Form
 - Once submitted, form will be routed to Office of University Registrar who will work with Cis/EAB team to triage and resolve reported issue(s). ***Estimated Timeframe for resolution: 30-45 business days.***

Example CRM Case Information Screen

Customer Information	Case Information
Customer Vivek Upadhyay Department UAPC Location CENTRAL OFFICE Contact Method Vivek.Upadhyay@cuny.edu Edit Email Vivek.Upadhyay@cuny.edu <input type="text"/>	*Business Unit <input type="text" value="Central Office"/> Quick Code <input type="text"/> *Case Type <input type="text" value="Application Issue"/> *Case Subtype <input type="text" value="Application Error"/> *Case Status <input type="text" value="Open"/> <input type="checkbox"/> Resolved by First Contact
Search Again	*Provider Group <input type="text" value="CIS Student Records"/> Assigned To <input type="text"/>
Problem Information	*Category <input type="text" value="EAB - Navigate"/> *Specialty Type <input type="text" value="Change Request"/> *Detail <input type="text" value="N/A"/> Case Priority <input type="text" value="Medium"/> *Case Severity <input type="text"/> *Source <input type="text"/>
*Problem Summary Change Request	
Description form attached.	
Actions	
Suggested Action	
Description	

Navigate Roles

- ☐ **How are Roles and Permissions assigned in Navigate?**
 - Roles and permissions are automated based on the nightly data extract from CUNYfirst. University will manage the process for transferring data transfer to Navigate. Students and Instructors are assigned roles based on class schedule and enrollment.
- ☐ **How do the roles/permissions work in the Navigate system?**
 - Users can have multiple roles in Navigate. Users will be assigned all the roles for which they are qualified at point of a given extract. The following is the list of the roles that have been set up in Navigate with a broad descriptions of their permissions. Except as noted, colleges can assign users to all appropriate roles through their college administrator.

Navigate Access Request / CRM

- ☐ All Navigate users will receive FERPA training at their college prior to receiving an account and login information. Persons interested in obtaining a login for Navigate should request access via local helpdesk/Application Security liaison (ASL) by
 - Filling out EAB User Request Form - https://www.cuny.edu/wp-content/uploads/sites/4/page-assets/about/administration/offices/cis/information-security/cunyfirst-peoplesoft-security/EAB_USER_ACCESS-v1.05.pdf
 - With requested roles
 - Approval from employee manager

- Approval from and Student Records Campus Approver
- College accounts are typically created within 1-2 business days. Requestors will receive an email once request has been processed by campus ASL. Navigate uses CUNY Login credentials (same one you use for CUNYfirst production), FirstName.LastNameNN@login.cuny.edu.
- Once CUNYfirst account is setup, user role data will be transmitted to Navigate for automated provisioning. **Estimated Timeframe for resolution: 1-2 business days.**

Example CRM Case Information Screen

Save

360

Case ID 488315

Customer [Vivek Upadhyay](#)

Contact Method Vivek.Upadhyay@cuny.edu

Status Open

Summary

Open Cases 43

Case

Solution (0)

Summary

Notes (0)

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Related Cases (0)

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Customer [Vivek Upadhyay](#)

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Assigned To

*Category EAB - Navigate

*Specialty Type Access

*Detail N/A

Case Priority Medium

*Case Severity

*Source

Actions

Suggested Action

Description

Save Case

Find Solutions

Escalate Case