



EAB

# Specialists' Meeting

Texas A&M University

Student Success Collaborative

- 1 **Introductions**
- 2 What's New in Navigate360
- 3 College and Unit Use of Navigate360
- 4 Navigate360 Q&A



# Introductions

Name and Role – and use of Navigate360

# Meet Your Strategic Leader



**Whitney Wilson Paschal**

*Senior Strategic Leader, Student  
Success*

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# Discussion

1. What are your goals/ top priorities for the upcoming Academic Year?
2. Which of these features are you most excited about?
3. What new features or processes do you want to prioritize piloting this upcoming Academic Year?



# What's New in Navigate360

Major feature releases January – June 2025

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• FEATURE RELEASES

1



# Custom Attributes

Import custom data from any source

Custom Attributes	
<input type="text" value="Search in Results"/>	
ATTRIBUTE	VALUE
Campus Address	325 Keough Hall
FAFSA Status 2025-2026	Processed
NCLEX Exam Result	pass
Number of Extracurricular Activities	1
Orientation Attended On:	07/01/2022
Preferred Method of Communication	SMS
1 - 7 of 7 <input type="text" value="50"/> < 1 > >>	

## Feature Highlights

- Visible on the student profile page – overview tab
- Custom Attribute filters are available in most V3 Reports and as columns in the report output
- Custom Attributes files are imported via API; requires some work from partner's technical team
- Custom Attributes may be sent to Navigate360 more frequently than once per day

# Differentiating 3 Navigate360 Features



## The key differences between Custom Attributes, Categories, and Tags

	Custom Attributes	Categories	Tags
	Partners can send data points from any data source to Navigate360	Partners can send data points stored in their SIS to Navigate360	Partners can manually add any data points within Navigate360
Format	1+ values per attribute (e.g. Clubs: Soccer, Golf)	1 value per category (e.g. Club Soccer)	1 value per tag (e.g. Club Soccer)
Data Flow	API (Partner Owned)	Nightly Files	Manually Added
Frequency of Import	As often as scheduled by the partner	Nightly	As often as manually added by the partner
Role Permissions to View	✓	✓	✓
Care Unit Restrictions		✓	
Relationship Auto-Assignments		✓	
Scheduling Restrictions		✓	
Advanced Search Filters		✓	✓
V3 Report Filters	✓	✓	✓
Analytics Filters		✓	✓



# Let's Brainstorm!



What are some data points that live in other systems on campus that you wish were in Navigate360?

How would the addition of this data support your work or open up new workflows?

# Minor Field on the Student Profile

Clearer visibility for student minor directly on Student Profile Overview

Overview

Communication Specialist (CS)  
Bachelor of Arts  
College of Arts and Sciences

Major History ▾

Student ID  
892773665

Alternate ID  
mrpeterburris@gmail.com

**Minor**  
Leadership Studies

Classification  
Sophomore

Most Recent Enrollment  
Fall 2024

Data Filters ?

Filters Logic: Match all Filters (AND) ▾ ? Results must match ALL filters: 1

Field \*

1

+ Add

Student Area of Study

College

Concentration

Degree

Major

Minor

☐ Include

Run Re

## Feature Highlights

- New **dedicated minor field** in the Overview section of the student profile.
- Additionally, new minor field available as a filter across several **V3 reports**, including Students, Student Enrollments, Alerts, Cases, and more.
- Supports the display of **multiple current minors**
- Reach out to [Navigate360TechSupport@eab.com](mailto:Navigate360TechSupport@eab.com) to support transitioning minor data from categories to dedicated minor field.

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# Display Options for Minor in Navigate360

## Reviewing (new) Minor Field, Categories, and Custom Attributes

	Minor Field*	Custom Attributes	Categories
	Partners can send data points stored in their SIS to Navigate360	Partners can send data points from <i>any</i> data source to Navigate360	Partners can send data points stored in their SIS to Navigate360
Format	Multiple values, 256 character max	1+ values per attribute (e.g. Minors: History, Music)	1 value per category (e.g. Minor: Music)
Data Flow	Nightly Files	API (Partner Owned)	Nightly Files
Frequency of Import	Nightly	As often as scheduled by the partner	Nightly
Displays in Profile Overview	✓		
Role Permissions to View		✓	✓
Care Unit Restrictions			✓
Relationship Auto-Assignments			✓
Scheduling Restrictions			✓
Advanced Search Filters			✓
V3 Report Filters	✓	✓	✓
Analytics Filters			✓

Note: The new minors feature is available to partners with the Core package or higher due to data availability. Partners will only be able to leverage one of these options for displaying student minor (s).

# Is the New Minors Field Right for Me?

Consider the ways you want to leverage minor data now and in the future

## **Choose the new minors field if...**

- It would be valuable to have minor displayed as its own dedicated field alongside the major in the student profile overview.
- You will provide relevant V3 reports permissions for all end users needing to identify students associated with a minor.

## **Discuss with your strategic leader if...**

- It would be valuable to use minor as a mechanism to restrict appointment scheduling or auto-assign relationships
- You will *not* provide relevant V3 reports permissions for all end users needing to identify students associated with a minor, meaning they would need to access this data via Advanced Search.
- It's sufficient to display the minor on the student profile separate from the student's major.

# Is the New Minors Field Right for Me?

## Comparing the location of the field(s) on the student profile

**New Minors Field** has dedicated location on the student profile alongside major, Student ID, Classification, etc.

Overview	
<b>Communication Specialist (CS)</b> Bachelor of Arts College of Arts and Sciences <b>Major History</b> ▾	<b>Student ID</b> 892773665 <b>Alternate ID</b> mrpeterburris@gmail.com <b>Minor</b> Leadership Studies <b>Classification</b> Sophomore <b>Most Recent Enrollment</b> Fall 2024

**Minors at Categories** displayed alongside other categories available in site beneath Student Overview and any Goals & Interests provided by the student.

Overview	
<b>Economics</b> Bachelor of Arts College of Policy Studies <b>Major History</b> ▾	<b>Student ID</b> 852121932 <b>Classification</b> Junior <b>Most Recent Enrollment</b> Fall Semester 2017
Goals & Interests (supplied by the student)	
Categories	
<input type="text" value="Search in Results"/>	
<b>CATEGORY NAME</b>	
Honor Roll	
International Student	
Minor: Languages	
Pell Eligible	
ROTC	

# Is the New Minors Field Right for Me?

## Comparing the filtering options in V3 reports

**Data Filters** ⓘ

Filters Logic: Match all Filters (AND) ⓘ Results must match ALL filters: 1

Field \*

1

+ Add

Student Area of Study

College

Concentration

☐ Include

Degree

Major

Minor

Run Report

**New Minors Field** has dedicated filter available in V3 reports alongside Degree, Major, etc.

**Minors as Categories** may be filtered alongside other categories available in site.

**Data Filters** ⓘ

Filters Logic: Match all Filters (AND) ⓘ Results must match ALL filters: 1

Field \* Condition \* Value \*

1 Categories contains any

+ Add Filter

☐ Include Inactive Users ☐ Include My Students Only

Run Report

☐ Lacrosse (A13)

☐ Minor: Forestry (A9)

☐ Minor: Languages (A10)

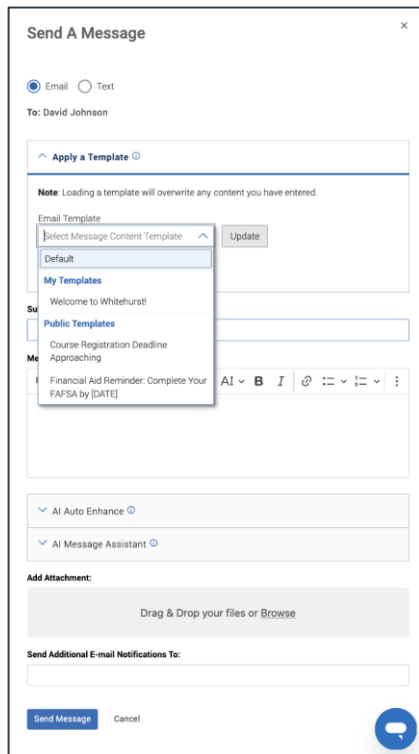
☐ Pell Eligible (A19)

☐ Rock Climbing Club (A17)

☐ ROTC (A14)

# Message Content Templates

Create a library of SMS and email templates that can be saved or shared



The screenshot shows the 'Send A Message' dialog box. At the top, there are radio buttons for 'Email' (selected) and 'Text'. Below this is the 'To:' field with the name 'David Johnson'. A section titled 'Apply a Template' contains a note: 'Loading a template will overwrite any content you have entered.' Underneath, there is a dropdown menu for 'Email Template' with the following options: 'Select Message Content Template' (with an 'Update' button), 'Default', and 'My Templates'. The 'My Templates' section is expanded, showing three templates: 'Welcome to Whitehurst!', 'Course Registration Deadline Approaching', and 'Financial Aid Reminder: Complete Your FAFSA by [DATE]'. Below the templates, there are sections for 'AI Auto Enhance' and 'AI Message Assistant'. At the bottom, there is an 'Add Attachment' section with a 'Drag & Drop your files or Browse' button, and a 'Send Additional E-mail Notifications To:' field. The 'Send Message' button is at the bottom left, and a 'Cancel' button is next to it. A blue speech bubble icon is at the bottom right.

## Feature Highlights

- Message Content Templates can be created by a user for their personal use or can be made public for use by end users across campus
- This feature is best used for common or recurring communications
- This tool can both standardize and streamline student communication processes within or across areas
- EAB has provided 5 Starter Templates that may be used, edited, or deleted by each institution.

# Pre-Appointment Questions



Request additional information or documents prior to an appointment



## Please complete your pre-appointment questions

Hello, Student 62

Please provide responses to the pre-appointment questions for your upcoming appointment.

**Appointment Date and Time:**

07/31/2024 1:00pm - 1:30pm IT

**Staff:**

Advisor25 Advisor25

**Location:**

Accessibility Office

**Topic:**

Transfer Planning

**Meeting Type:**

MT1

[Answer Pre-Appointment Questions](#)

You can also copy and paste this address into your web browser

## Feature Highlights

- Use pre-appointment questions to gather information or documents from students before a scheduled appointment
- Pre-Appointment questions may be customizable at the Care Unit x Location x Service level
- Includes an Upload Question Type
- Student responses may be viewed in the appointment instance, in recent and upcoming appointments views, and/or in reports
- 2 new reports, Pre-Appointment Metrics and Pre-Appointment Responses have been added



# Post Appointment Feedback



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## Please take a minute to give feedback on your recent appointment

Hello, David

Please respond to the request below to give feedback on your recent appointment.

### Appointment Date and Time:

11/15/2023

[Go Back to Dashboard](#)

### Staff:

Jack Wh

### Location:

Academ

### Topic:

Academ

### Meeting:

In Perso

[Give Feedback](#)

## Appointment Feedback

Appointment Details: Advising | 11/15/2023, 12:45 PM - 01:30 PM ET

Progress

My advisor was prepared to meet with me today \*

- ☐ 1 Strongly disagree
- ☐ 2 Disagree
- ☐ 3 Neither agree nor disagree
- ☐ 4 Agree
- ☐ 5 Strongly Agree

Next >

# Journeys

Journeys let you organize topic-specific **steps** and **action items** into a **single guided pathway** to help students navigate their goals with clarity.

Journeys is seamlessly **integrated** across the Student, Staff, and Reporting platforms; students can mark items as completed while staff can track individual progress or **monitor** groups of students to provide timely **nudges and support**.

*\*Journeys is included in the  
**Student Engagement**  
partnership package*

# Journeys

- 1 Journey Explorer
- 2 Journey Steps
- 3 Completion Reason
- 4 Journey Progress
- 5 Advisor Journey View
- 6 Assigning Journeys
- 7 Automating Journeys
- 8 Journey v3 Report
- 9 Creating Journeys

Woodley University

NAVIGATE Explore Planner

Home

Appointments

Reports

Study Buddies

Class Schedule

To-Dos and Events

Resources

Holds

Messages

My Major

Financial Planner

Surveys

Account

< [Go Back](#)

## First Year Orientation

3 of 8 completed

Topic: First Year Students

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut la bore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco labor is nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate it esse cillum dolore eu fugiat nulla pariatur.

[Show Less](#)

Steps in this Journey

[Pick up your Dorm key from the front desk](#)  
Due Date: 08/11/2023

[Register your Dorm key](#)  
Completed On: 04/12/2024

[Take your ID photo & Fill out Student ID form](#)  
Due Date: 08/19/2023

[Register your Student ID](#)  
Completed On: 03/17/2024

[Complete any class pre-requisites before Aug. 30th](#)  
Due Date: 10/24/2023

[Campus Maps and Resources](#)  
Completed On: 02/01/2024

Completed

# Staff Only Journeys

Deliver highly tailored support while keeping student-facing Journeys catalog focused and relevant

<input type="checkbox"/>	JOURNEY TITLE	FEATURED	STAFF ONLY	# OF STEPS
<input type="checkbox"/>	<a href="#">For Advisors: Doctoral Dis...</a>	<input type="button" value="No"/>	<input type="button" value="Yes"/>	11
<input type="checkbox"/>	<a href="#">For Advisors: Pre-Engineer...</a>	<input type="button" value="No"/>	<input type="button" value="Yes"/>	11
<input type="checkbox"/>	<a href="#">For Advisors: Returning Fr...</a>	<input type="button" value="No"/>	<input type="button" value="No"/>	5
<input type="checkbox"/>	<a href="#">Doctoral Dissertation Com...</a>	<input type="button" value="No"/>	<input type="button" value="No"/>	11
<input type="checkbox"/>	<a href="#">New Student Onboarding</a>	<input type="button" value="Yes"/>	<input type="button" value="No"/>	4

## Feature Highlights

- Allows staff to create specialized Journeys for unique student needs
- Marking a Journey as “Staff Only” keeps niche sensitive Journeys out of the public student-facing catalog
- Staff can assign any Staff Only Journey to students through individual, group, or automation-based assignment
- Content managers denote Staff Only Journeys in the CAT

## Steps to Enable

1. Content Administrator with Journeys permissions can enable “Staff Only” field when building or editing a Journey
2. Once the Journey is published, it is visible to and may be assigned by staff users only

# Bulk Update Journey Steps

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Efficiently manage and validate student progress by bulk updating the Journey Step Status from the Journeys Report

The screenshot shows a 'Bulk Update Steps' dialog box overlaid on a 'Report Results' table. The table lists student journey steps with columns for selection, student name, email, student ID, and alternate ID. The dialog box contains a message about 84 selected steps, a dropdown for 'Completion Reason' set to 'This is completed', a text area for 'Staff Comment' with the text 'Attended Career Fair Event on 3/21', and 'Save' and 'Cancel' buttons.

	STUDENT NAME	EMAIL	STUDENT ID	ALTERNATE ID
<input checked="" type="checkbox"/>	Abe, Carolyn	brfbjones@woodley.eab.edu	81460732	02817203
<input checked="" type="checkbox"/>	Albert, Frank	alscdonald@woodley.eab.edu	78403926	39440718
<input checked="" type="checkbox"/>	Allen, Michelle	xufslayton@woodley.eab.edu	87965403	46459146
<input checked="" type="checkbox"/>	Allen, Thomas	iecatorres@woodley.eab.edu	46128093	49389808
<input checked="" type="checkbox"/>	Baker, Karen	csedriera@woodley.eab.edu	73926105	09200863
<input checked="" type="checkbox"/>	Bass, Kaye	euhramey@woodley.eab.edu	41073826	40382278

**Bulk Update Steps**

84 Steps selected. All selected Steps will reflect the new selected Completion Reason and Staff Comment. Any selected Steps that are already marked complete will also be updated.

Completion Reason  
This is completed

Staff Comment  
Attended Career Fair Event on 3/21

Save Cancel

## Feature Highlights

- Users can update Journey Step status for multiple students from Journeys Report
- Step updates can apply to multiple students across multiple Journeys
- Can also bulk mark Journey steps as incomplete to create a verification workflow
- Any user with permission to view *Journeys Report* and *Bulk Assign Journeys to Students from Reports and Search* has access to bulk update Journey Step status.

# Journey Steps Content Preview

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Content Administrators can preview student Journey view in real time to aid in the creation of engaging Journey and Step content

## Edit a Step


Edit step details. Note that editing a published Journey will affect students who may have completed this item.

[Step Details](#) — [Step Blocks](#) — [Step Reminders](#)



### Step Blocks Form

#### Content Blocks

Add Content Blocks

text 


Rank  
2

Content Block Type   
Free Text 

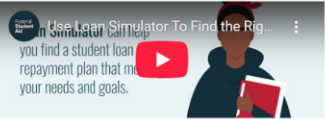
### Preview

#### Explore Student Loan Strategies

Due Date:

Show More 

Description



How to Use a Loan Simulator To Find the Right Repayment Plan

you find a student loan repayment plan that matches your needs and goals.

Dive into the ins and outs of student loans, including how interest works, repayment options, and strategies for minimizing your debt burden.

## Feature Highlights

- Content administrators see live side-by-side preview when creating or editing Journey Steps
- Edits reflected instantly without first needing to publish to students



# College and Unit Navigate360 Use

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## Small Group Discussion: How are we doing?

**Strengths**

**Weaknesses**

**Opportunities**

**Threats**



# Discussion

1. What are your goals/ top priorities for the upcoming Academic Year?
2. Which of these features are you most excited about?
3. What new features or processes do you want to prioritize piloting this upcoming Academic Year?



# Q&A



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