EAB

Specialists' Meeting

Texas A&M University

Student Success Collaborative

Introductions

Name and Role – and use of Navigate360

Meet Your Strategic Leader

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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

- FEATURE RELEASES 1

Custom Attributes

Import custom data from any source

Custom Attributes

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

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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		✔	✔

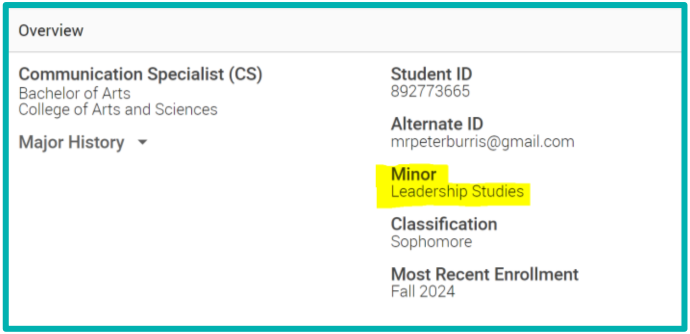
Let's Brainstorm!

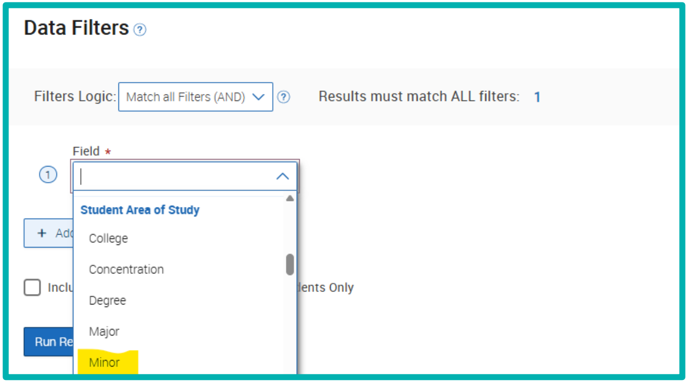
What are some data points that live in other systems on campus that you wish were in Navigate360?

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





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 to support transitioning minor data from categories to dedicated minor field.

Partners will only be able to leverage one of these options for displaying student minor (s).

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 *any* 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…

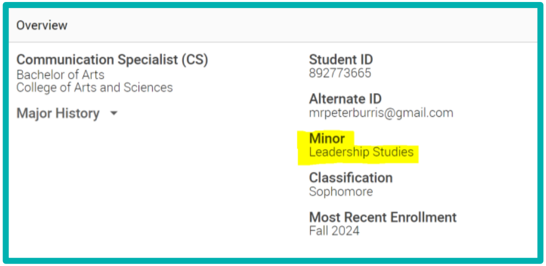
- It would be valuable to use minor as a mechanism to restrict appointment scheduling or auto-assign relationships

- 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.

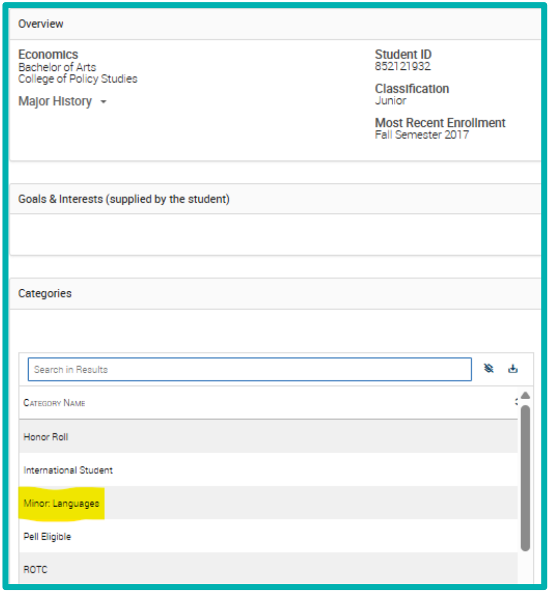
Is the New Minors Field Right for Me?

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.

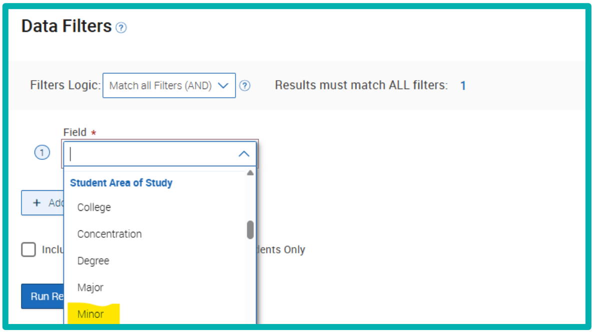


Minors at Categories displayed alongside other categories available in site beneath Student Overview and any Goals & Interests provided by the student.



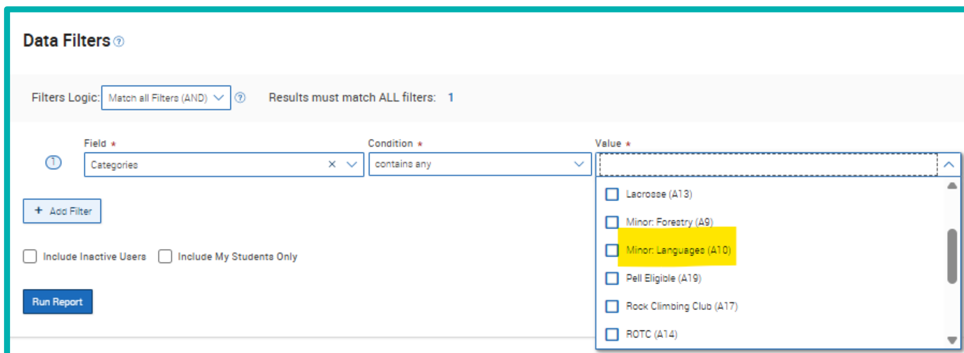
Is the New Minors Field Right for Me?

Comparing the filtering options in V3 reports



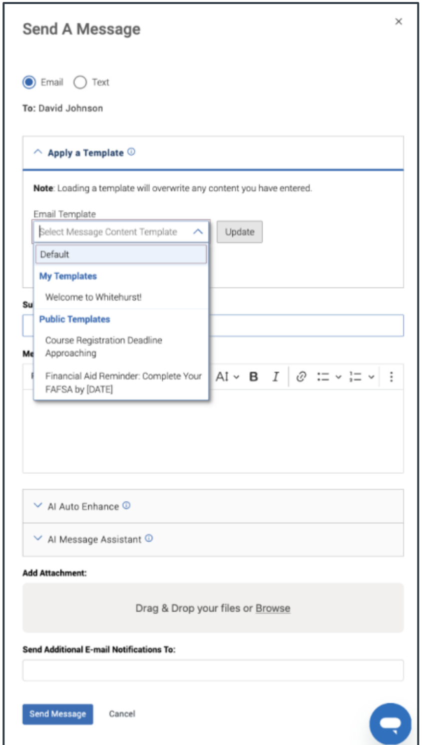
New Minors Field has dedicated filter available in V3 reports alongside Degree, Major, etc.

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



Message Content Templates

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



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

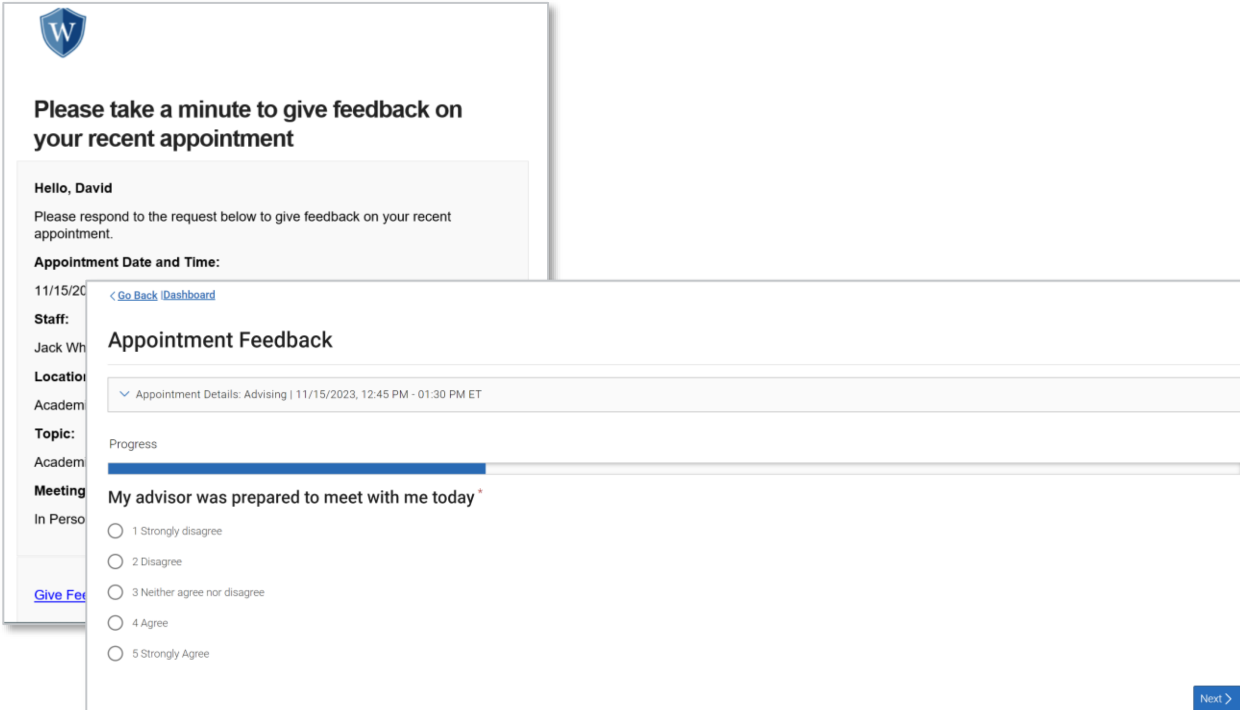
Answer Pre-Appointment Questions

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



Journeys

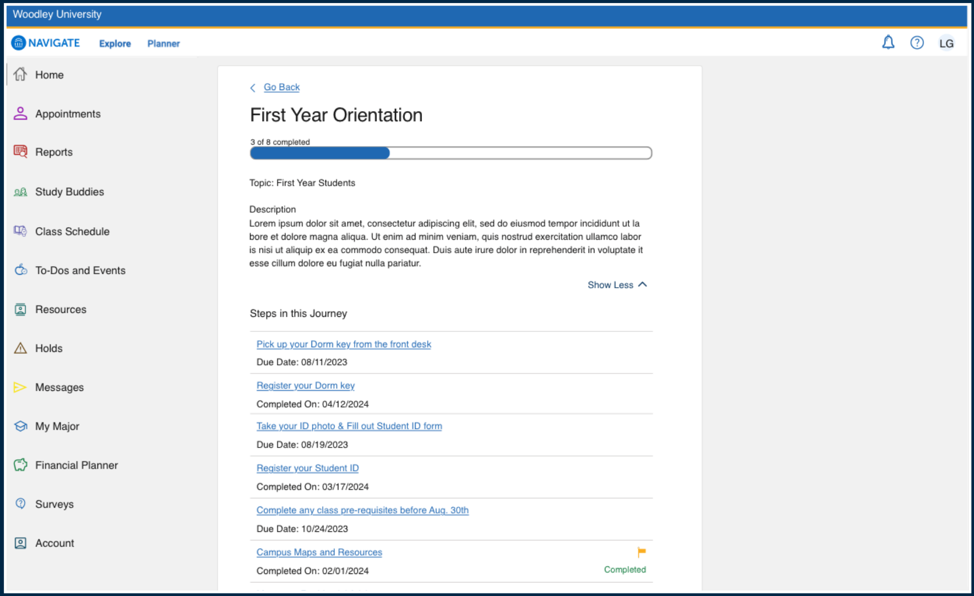
Journeys let you organize topic-specific **steps** and **action items** into a **single guided pathway** to help students navigate their goals with clarity.

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



Staff Only Journeys

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

Journeys

☐	Journey Title	Featured	Staff Only	# Of Steps
☐	For Advisors: Doctoral Dis...	No	Yes	11
☐	For Advisors: Pre-Engineer...	No	Yes	11
☐	For Advisors: Returning fr...	No	No	5
☐	Doctoral Dissertation Com...	No	No	11
☐	New Student Onboarding	Yes	No	4

Feature Highlights

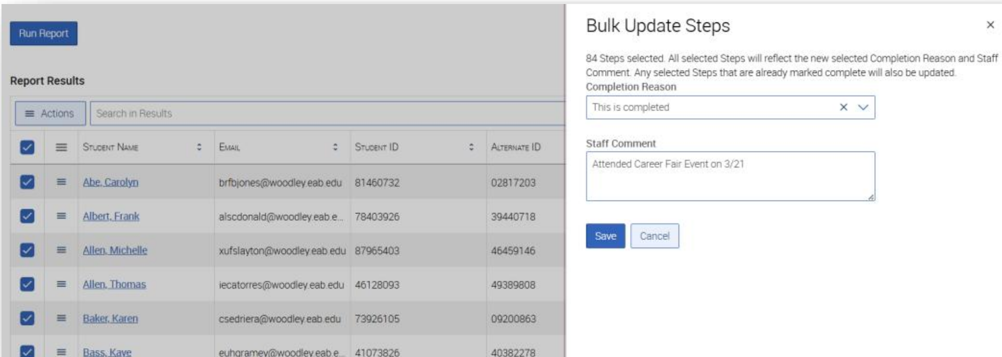
- Allows staff to create specialized Journeys for unique student needs
- Marking a Journey as “Staff Only” keeps niche sensitive Journeys out of the public student-facing catalog
- Staff can assign any Staff Only Journey to students through individual, group, or automation-based assignment
- Content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

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

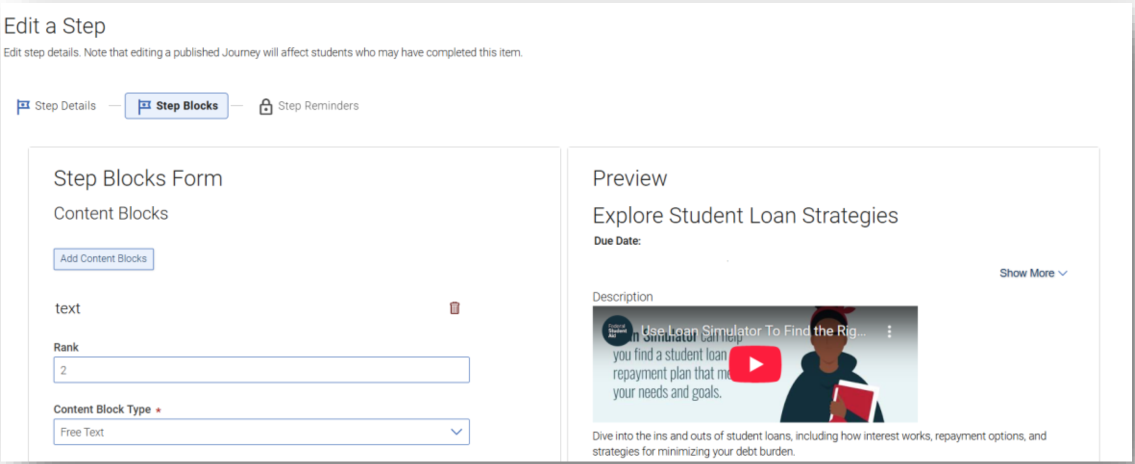


Feature Highlights

- 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

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



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

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College and Unit Navigate360 Use

Small Group Discussion: How are we doing?

Strengths	**Weaknesses**
Opportunities	**Threats**

Discussion

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Q&A

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