

Navigate: Dashboard

Objective: Dashboard enables staff members to efficiently manage their student caseloads by providing a customizable, at-a-glance view of critical student information and activities. This feature improves productivity and strategic decision-making and leverages our V3 report functionality to customize the dashboard for personalized needs.

My Dashboard



On this page, find summary information about your activity in Navigate360 and the activity of your assigned students.

Save Layout Settings Refresh

My Students

Predicted Concern (1711 students) Last Refresh: 10/01/2024 10:29 AM ET

Show Table

Level	Count
Low	247
Moderate	37
High	104
Unknown	1323

My Assigned Students Activity Feed

Last Refresh: 10/01/2024 10:29 AM ET

Search in Results

Items

- [Cynthia Clark appointment with Nicholas McDonald](#)
Declaring a Minor at 12:00PM ET
10/01/2024
- [Bernice Glerisch appointment with John Richards](#)
Unpaid Hold at 10:00AM ET
09/25/2024
- [Esteban Filatson appointment with Lorelei Brown](#)
Resolving a Hold at 8:00AM ET
09/24/2024

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My Appointment Summaries Pending

Last 90 days | View All Last Refresh: 10/01/2024 10:29 AM ET

Search in Results

Date	Student	Service	C
09/27/2024	Blake, Steven	General Transfer Advising	N
09/25/2024	Kelker, Douglas	Academic Planning	N
09/20/2024	Therrien, Scott	Academic Planning	N
09/20/2024	Palen, Carl	General Transfer Advising	N
09/13/2024	Crawford, Timothy	Declaring a Minor	N
09/06/2024	Townsend, Willie	Tutoring for my class	N
08/27/2024	Rountree, Joseph	Math Lab	N

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My Active Appointment Campaigns

Last Refresh: 10/01/2024 10:29 AM ET

There is no data to display.

My Enrolled Students

Enrolled in Fall 2024 (1711 students) Last Refresh: 10/01/2024 10:29 AM ET


Show Table

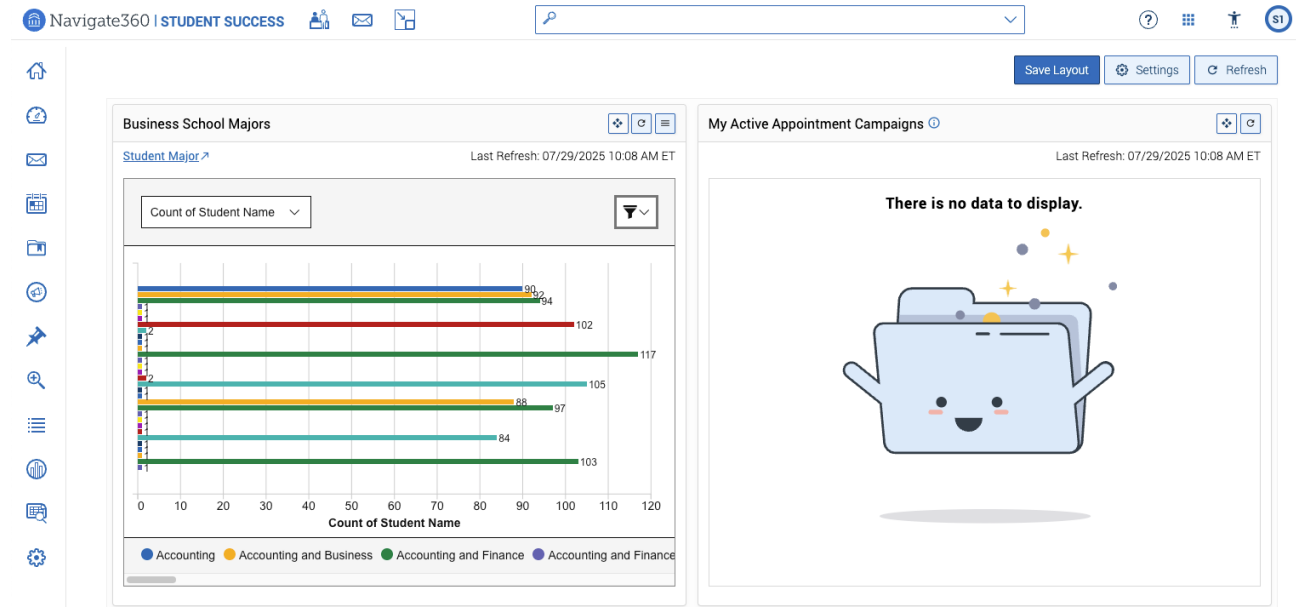
Status	Count
Not Enrolled	1711
Enrolled	0

My Upcoming Appointments

10/01/2024 | View All Last Refresh: 10/01/2024 10:29 AM ET

There is no data to display.

Staff members can adjust the layout of My Dashboard by using the  button to drag widgets and lists and arrange the dashboard accordingly.



The screenshot shows the dashboard interface with the following components:

- Header:** "Navigate360 | STUDENT SUCCESS" with navigation icons and a search bar.
- Navigation:** A vertical sidebar on the left with various icons.
- Widget 1: Business School Majors**
 - Buttons: Save Layout, Settings, Refresh
 - Dropdown: Student Major
 - Count of Student Name: [Dropdown]
 - Horizontal bar chart showing counts for various majors.
 - Legend: Accounting (blue), Accounting and Business (orange), Accounting and Finance (green), Accounting and Finance (purple).
- Widget 2: My Active Appointment Campaigns**
 - Buttons: Save Layout, Settings, Refresh
 - Message: "There is no data to display."
 - Illustration of a smiling folder.

Save these changes by selecting **Save Layout**.



Dashboards refresh daily when the user first opens the page but do not refresh every time the user opens the dashboard. If users want to update a tile or the whole dashboard after the initial daily launch, they need to select the **Refresh** button.

The **Settings** button allows you to take two actions: **Add Tile**, and **Modify Tile Settings**. Modifying Tile Settings allows the user to choose which tiles, including custom tiles, appear on their personal dashboard.

Modify Tile Settings ×

You can control which tiles are shown on the dashboard. From here, you can show/hide tiles by clicking the toggle next to their name, or delete tiles that you don't need anymore. If you want to update a tile's function, you will need to update the report it correlates to.


Don't see the tile you want? You can create a new one using a saved report. To add a new tile, return to the dashboard (Home), click the Settings button, and select Add Tile.

Caseload

Saved Report: [Cases - All Time](#) ↗


Data Visualization: Aggregated - Chart View

Tile Created At: 09/26/2024 3:09 PM ET




My Active Appointment Campaigns

View all of your active Appointment Campaigns and their associated performance metrics. Click on the campaign name to view details. This tile cannot be deleted but you can turn the tile on and off by using the toggle next to its name to hide/show.




My Appointment Summaries Pending

View your appointments completed in the past 90 days without an appointment summary. Click on a student name to go to the student profile, or click the "View All" link to manage recent appointments. This tile cannot be deleted but you can turn the tile on and off by using the toggle next to its name to hide/show.




My Assigned Students Activity Feed

View activity for your assigned students. Activity includes: newly assigned students, upcoming and past Appointments, new or closed Alerts, new or closed Cases, new Progress Reports, new Notes, new Appointment Summaries. Filter by activity type to include only those you wish. This tile cannot be deleted but you can turn the tile on and off by using the toggle next to its name to hide/show.




My Enrolled Students

Enrollment data on your students for the current term and next term. Select term and chart for more information. This tile cannot be deleted but you can turn the tile on and off by



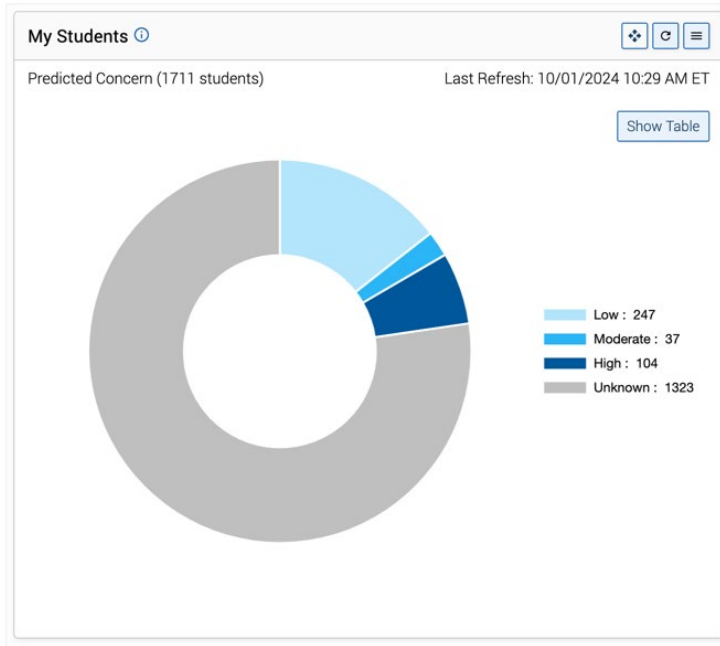
When you change a tile setting, select **Save Settings** to update the dashboard.

Dashboards are available to any users with a Role with a Staff user type enabled. This includes Advisor, Tutor, and Coach. Beyond this, staff users need the correct existing permission to see data on the Dashboard or to see the Actions Menus on the tiles. If staff users do not have the *View Alerts* permission, alerts do not show in the Activity Feed. If a user cannot access [Predicted Support Level](#), that graph does not show on the Dashboard.

There are seven pre-created tiles available on the Dashboard, as well as any custom-created ones the user has made. Various settings are controlled by the **Settings** button and buttons in the corner of the tile. You can refresh data on any tile by clicking the  icon. Each tile also has a label informing users of the date and time it was last refreshed.

My Students

Note. You must have the permission *View Student Predicted Support Level Breakdown* (in the Profiles section) to display this widget. Ask your Application Administrator if you don't have it.



This tile shows several types of aggregate information about your assigned students. You can change what displays by opening the menu and choosing from the options.

My Students



Select Audience

My Assigned Students

Select View

Concern

Concern

Appointments Completed - Last 90 days

- **Select Audience.** This option displays your students by audience.
- **Select View.** This option lets you choose which graph you want to see.

Each option lets you view the list of students by clicking on a segment of students.

My Assigned Students Activity Feed

This tile is an aggregated list of activity for your assigned students. Only the student activities you have access to will display in this list. For example, you only see Alerts Issued if you can see Alerts on your students.

My Assigned Students Activity Feed ⓘ

Last Refresh: 10/01/2024 10:29 AM ET

Search in Results

ITEMS

- [Cynthia Clark appointment with Nicholas Mcdonald](#)
Declaring a Minor at 12:00PM ET
10/01/2024
- [Bernice Gierisch appointment with John Richards](#)
Unpaid Hold at 10:00AM ET
09/25/2024
- [Esteban Elletson appointment with Lorelei Brown](#)
Resolving a Hold at 8:00AM ET
09/24/2024

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The activities included in the feed are:

- Alert Issued
- Appointment Scheduled
- Case Closed
- Case Opened
- Check in
- Note Added
- Progress Reports Added
- New student assigned to you

This tile includes a filter that lets you choose which activity types to see in the feed. You must set the filter every time you open the Dashboard.

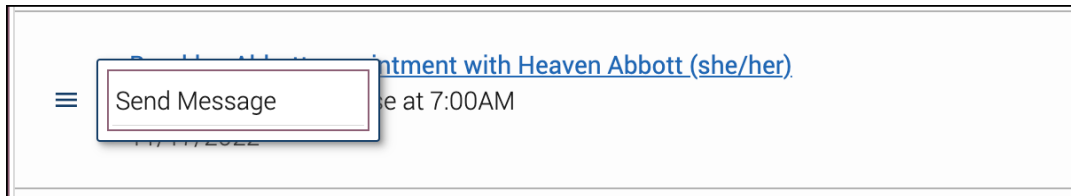
My Assigned Students Activity Feed

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Select Filters

- Alert issued
- Appointment
- Case closed
- Case opened
- Check-In
- Note added
- Progress Report
- Student assigned

Staff can send a student a message if they have permission by opening the hamburger menu in front of a feed entry.



My Upcoming Appointments

This tile shows a list of upcoming appointments for the staff member. Staff can change the date for the tile and view all appointments by selecting the **View All** link, which opens the Staff Home page.

My Upcoming Appointments ⓘ

10/02/2024 | [View All](#) ↗ | Last Refresh: 10/01/2024 10:38 AM ET

Search in Results

ITEMS

- General Advising with Douglas Kelker
Advising | Remote | Zoom
1:30 - 1:45 PM ET

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My Appointment Summaries Pending

This tile shows a list of appointments you had in the past 90 days that do not have Appointment Summaries. In this case, it does not matter if the student you met with was assigned to you or not.

My Appointment Summaries Pending ⓘ

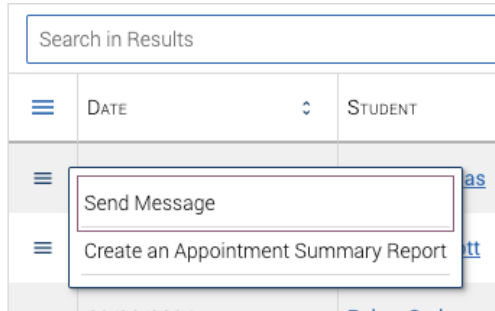
Last 90 days | [View All](#) ↗ | Last Refresh: 09/26/2024 12:42 AM ET

Search in Results

DATE	STUDENT	SERVICE	Col
09/25/2024	Kelker, Douglas	Academic Planning	N/A
09/20/2024	Therrien, Scott	Academic Planning	N/A
09/20/2024	Palen, Carl	General Transfer Advising	N/A
09/13/2024	Crawford, Timothy	Declaring a Minor	N/A
09/06/2024	Townsend, Willie	Tutoring for my class	N/A
08/27/2024	Rountree, Joseph	Math Lab	N/A
08/22/2024	Morace, Kevin	General Advising	N/A

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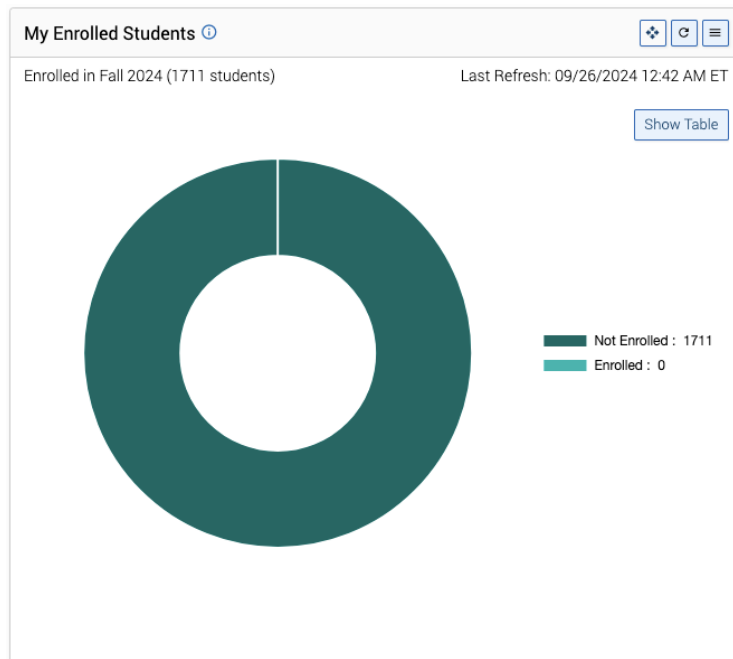
Clicking the student's name opens their Student Profile. You can also click the hamburger menu in front of the student name to open the Actions Menu.



You can also see all your recent appointments by selecting the **View All** link on the tile.

My Enrolled Students

This tile shows a pie graph of the staff member's assigned students who have enrolled for the selected term and those who haven't. By clicking a segment, staff open a list of the students who have/have not enrolled.



Clicking **Show Table** shows this information in list form.

My Enrolled Students ⓘ

Enrolled in Fall 2024 (1711 students) Last Refresh: 09/26/2024 12:42 AM ET

Show Chart

ENROLLED IN FALL 2024	VALUE
Not Enrolled	1711
Enrolled	0

Staff can change the term in the **My Enrolled Students** tile by clicking the menu icon . A filter with all available terms opens.

My Enrolled Students



Select View

- Enrolled in Spring 2023
- Enrolled in Fall 2023(Future)
- Enrolled in Summer 2023
- Enrolled in Spring 2023**
- Enrolled in Fall 2022
- Enrolled in Summer 2022
- Enrolled in Term#2

My Appointment Campaigns

This tile shows a list of active Appointment Campaigns you created. Selecting the **View All** link opens the associated **Appointment Campaigns** page in Navigate360.

My Active Appointment Campaigns ⓘ ⌵ ⌲

[View All](#) ↗ Last Refresh: 10/01/2024 10:51 AM ET

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NAME	SERVICE	DATES	# STUDENTS
Mid-Term Check In	General Advising	10/01/2024 - 10/31/2024	100

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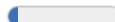
Each active Appointment Campaign on the tile includes the following associated metrics: *Number of Students, Appointments Scheduled, Attendance Rate, and Appointment Summaries Created.*

My Enrollment Campaigns

This tile shows any active Enrollment Campaigns you are involved in. Clicking the name of the Enrollment Campaign takes you to that campaign on the **Campaigns** tab.

My Enrollment Campaigns ⓘ 🔄

Active Enrollment Campaigns | [View All](#) ⓘ

Name	Students	Stats
fall 2021 ⓘ 09/23/2021 - 11/30/2021	100	Enrolled Rate 8% 

Each active Enrollment Campaign in the list includes the following associated metrics: *Number of Students*, *Stats*. The stat shown is the Enrollment Rate of students in the campaign.

Creating and Editing Staff Dashboard Tiles

Important. The sample report and tile created in this article is meant to be an example; it may not reflect realistic data and is not the only type of tile users can create for the Staff Dashboard.

Users can create their own custom tiles for Staff Dashboard. In this article, we are going to show the steps needed to create a tile that shows the number of students in certain majors. To do this, users need access to the V3 Reports, specifically the Students Report.

Building and Saving a Report

Open the Standard Reports tab in V3 Reports. For this example, select Students Report from the list.

My Saved Reports

Standard Reports

My Report Automations

Standard Reports

Select a report type below to customize and run a new report. To save a report for future use, click save from the report results.

① You Are Currently Viewing the V3 Standard Reports

These reports have improved infrastructure, advanced filtering options, and new grid styling and functionality. These reports will produce the same results as our V2 reports. Should you have any questions or need assistance with these reports for any reason, click [here](#).

V2 reports will be deprecated on December 31, 2025.

Search in Results

REPORT TYPE	CATEGORY
Assignments Report	Student Data Reports
Attendance Report	Student Data Reports
Notes Report	Student Data Reports
Students Enrollments Report	Student Data Reports
Students Report	Student Data Reports

Next, set your filters. For this example, the filter was *Major contains any* along with a selection of 10 majors from a list. To further refine the report, the user could select something like *Overall GPA less than or equal to 2.9* or only students assigned to a certain staff member. Select **Run Report**.

The Report Results display.

Report Results

<input type="checkbox"/>		STUDENT NAME	EMAIL	STUDENT ID	ALTERNATE ID	CATEGORIES
<input type="checkbox"/>		Abbott, Nancy	hpbvnelson@woodley.eab...	13587094	04490197	Pell-Eligible, Academic P...
<input type="checkbox"/>		Abernathy, Lisa	fkslkazin@woodley.eab.edu	40392687	13263117	Minor - Art History, Child...
<input type="checkbox"/>		Acosta, Teresa	nvbfmerrill@woodley.eab.e...	26198473	20066594	Minor - Economics, First...
<input type="checkbox"/>		Adams, Jerry	gcjpmiyake@woodley.eab.e...	53218067	74825880	Sport - Mens Swimming
<input type="checkbox"/>		Adams, Todd	kzctsimmons@woodley.ea...	42693015	49558555	Childcare dependent, Co...
<input type="checkbox"/>		Adamson, Michael	zlqovalentino@woodley.ea...	27345896	25451213	App user, Sport - Mens S...

0 selected
1 - 100 of 1232

At this point, save your report. Next, we create a basic pivot table so that a graph can display on the dashboard.

Adding the Tile to the Dashboard

Now that you have a saved report and a saved pivot table, return to the Staff Dashboard.

Select **Add Tile**. The **Add Tile** menu panel opens.

Add Tile
×

To create a tile, add the name, select a report to pull data from, and choose how that data will display. You **MUST** create a saved report before using it in a tile. If you edit an existing tile or its underlying saved report, then the dashboard will reflect these updates.

Title Name *

Select Saved Report *

Don't see your report? You can [create a report now](#).

Select View

Save Tile
Cancel

Name your tile. Select a saved report from the dropdown field. In this example, it's the *Who Opened the Cases?*

Next, select your view from one of the three options:

1. **Detail View (Disaggregated):** Shows a list of results from your report in a disaggregate view, essentially the report results. This view allows you to take actions on students directly from the dashboard tile.
2. **Chart Summary (Aggregated):** Shows the pivot table chart you created, if you have done so. If you have not yet created a pivot table chart, the application will not create the tile from your saved report.
3. **Table View (Aggregated):** Shows an aggregated grid you created with the pivot table tool, if you have done son. If you have not created a table view, the application will not create the tile using this view with your saved report.

After selecting these options, click **Save Tile**. The tile will now appear on Staff Dashboard.

