

My Dashboard



Help Center Manager
5 months ago Updated

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What: The **Staff Dashboard** is a feature designed to give you an at-a-glance, actionable information about students who are assigned to you and an overview of ongoing or recent activity. Users can create custom tiles from V3 Reports to be more productive and strategic when managing your unique student caseload.

Where: Open the Dashboard by selecting the **My Dashboard** button in Navigate360 Staff.

Who: The current Dashboard is for **staff**.

Conditions: 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. To add custom tiles, users need to be able to create V3 reports. The Staff Dashboard must be turned on by EAB. To enable this feature, contact Partner Support at NavigateTechSupport@eab.com.

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Feature Video

Feature Overview

Dashboards

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 ⓘ

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☰

Predicted Concern (1711 students)

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

Show Table

Low : 247

Moderate : 37

High : 104

Unknown : 1323

My Assigned Students Activity Feed ⓘ

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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

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[Esteban Elletson appointment with Lorelei Brown](#)
Resolving a Hold at 8:00AM ET
09/24/2024

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My Appointment Summaries Pending ⓘ

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Last 90 days | [View All](#)

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

Search in Results

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DATE

↓

STUDENT

SERVICE

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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

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08/27/2024

[Rountree, Joseph](#)

Math Lab

N

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My Active Appointment Campaigns ⓘ

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

There is no data to display.

My Enrolled Students ⓘ

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Enrolled in Fall 2024 (1711 students)

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

Show Table

Not Enrolled : 1711

Enrolled : 0

My Upcoming Appointments ⓘ

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10/01/2024

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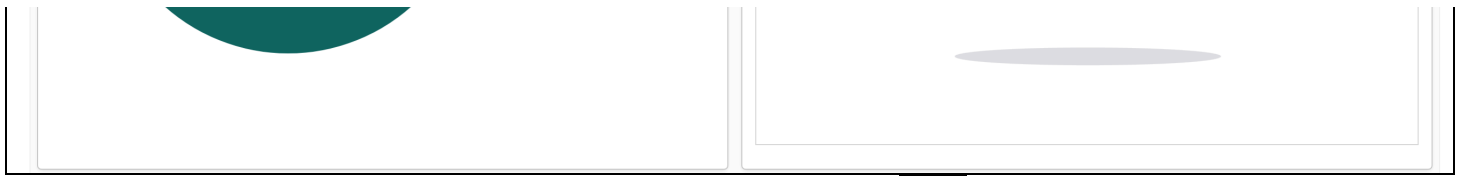
☐


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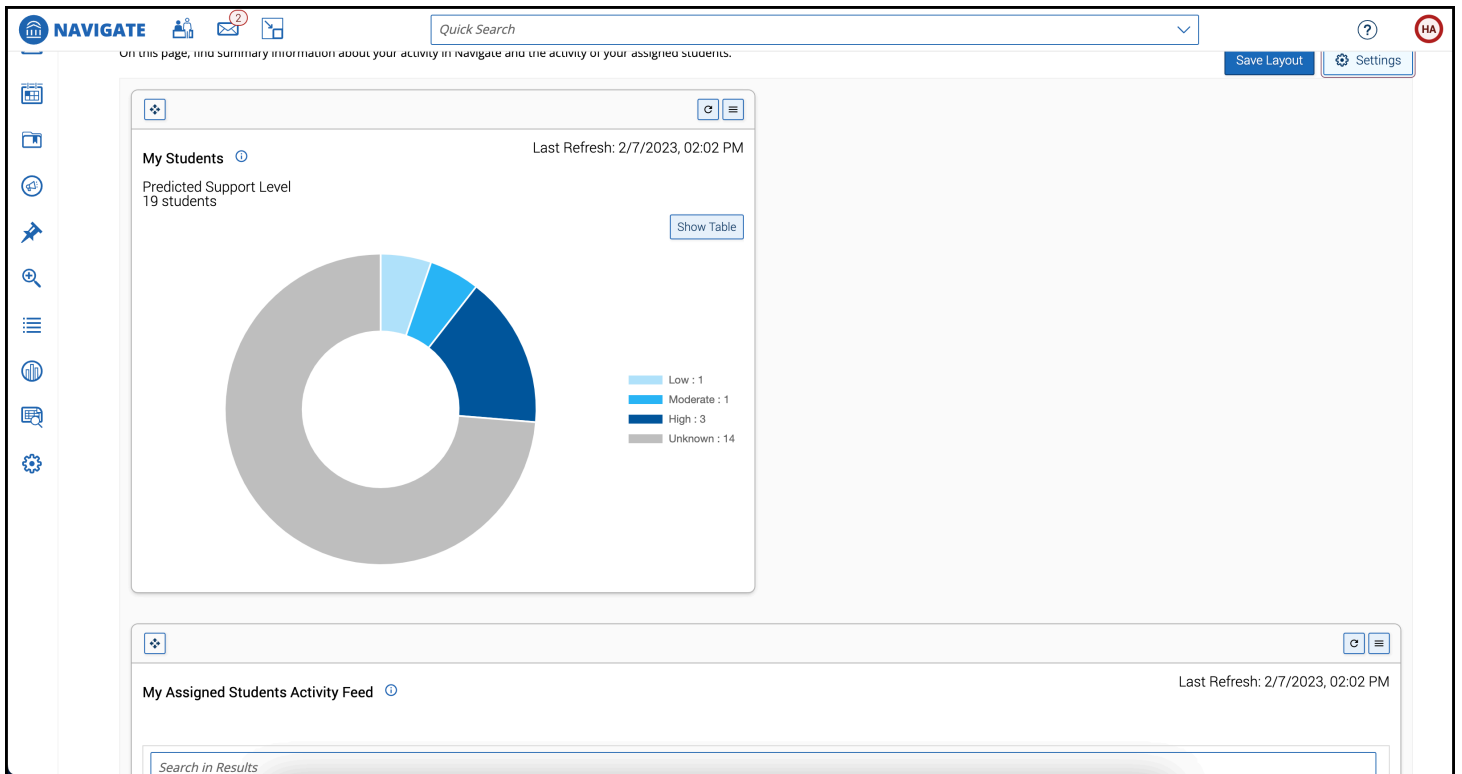
 | [View All](#)

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

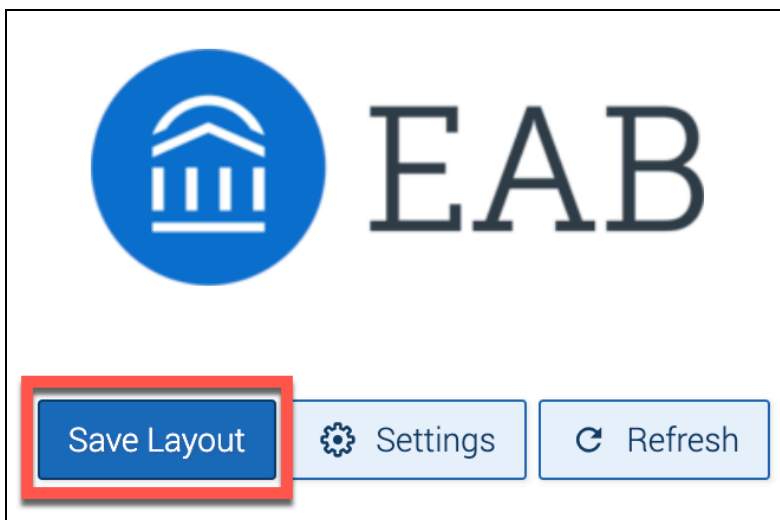
There is no data to display.



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



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

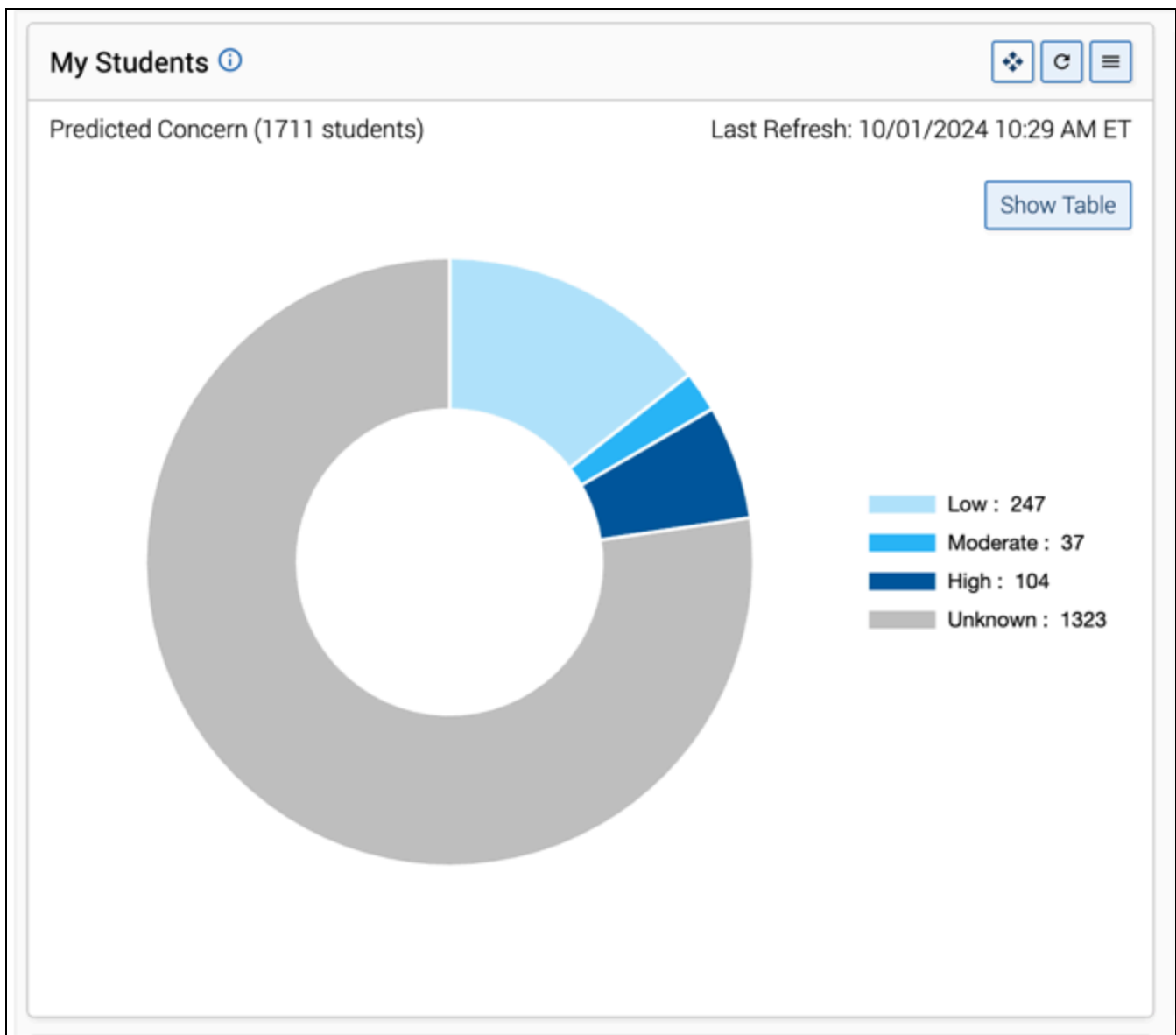
When you change a tile setting, select **Save Settings** to update the dashboard.

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


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 ×

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.

≡

Send Message

Appointment with Heaven Abbott (she/her)

at 7:00AM

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

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| [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.

Search in Results

	DATE	STUDENT
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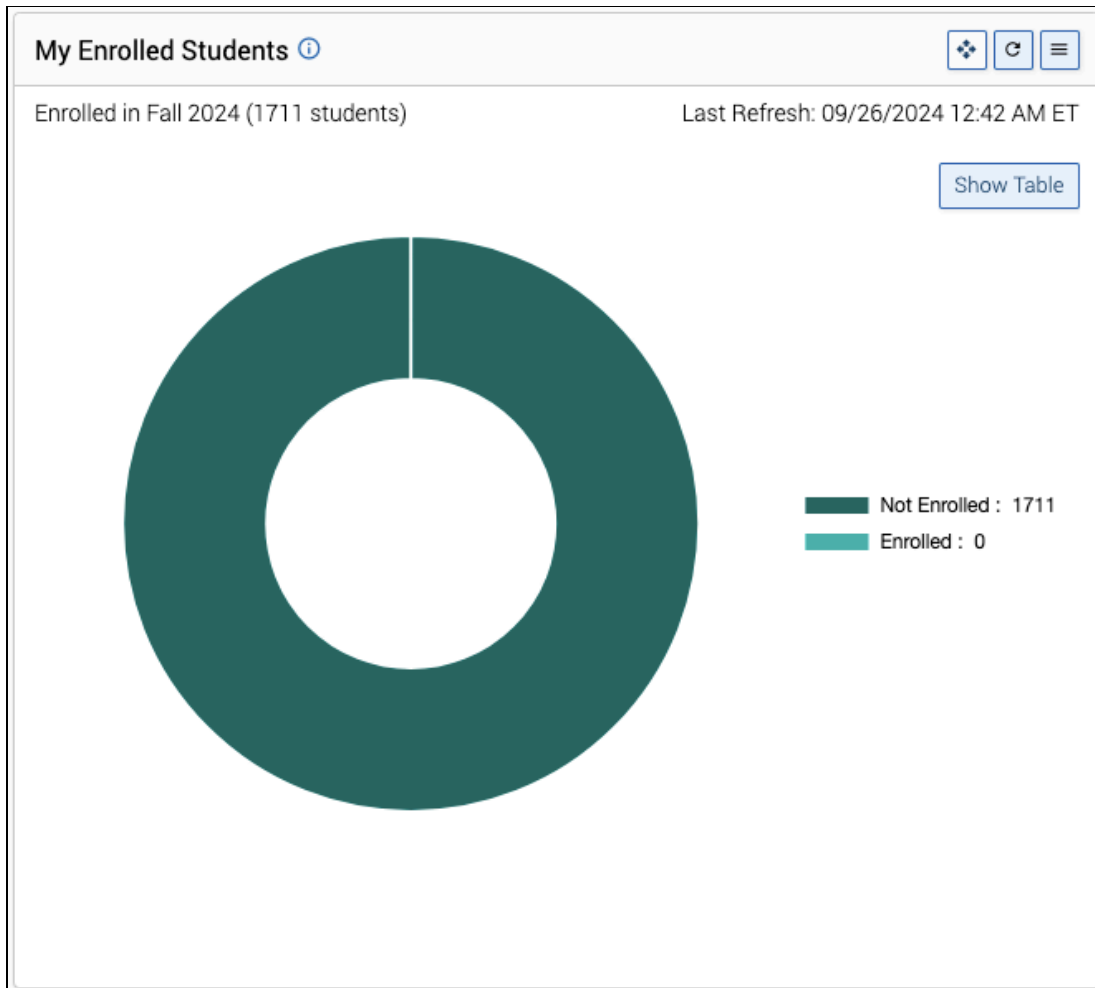
Send Message

Create an Appointment Summary Report

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

Search in Results

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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

https://helpcenter.eab.com/hc/en-us/articles/1500008665181-My-Dashboard

14/19

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 i

Active Enrollment Campaigns | [View All](#)

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

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 user's case load. To do this, users need access to the V3 Reports, specifically the Cases Report.

Building and Saving a Report

My Saved Reports

Standard Reports

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.

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 need to access old V2 reports for any reason, click [here](#).

Reminder: The V2 reports will be deprecated on a later date, to be announced.

Search in Results

REPORT TYPE	CATEGORY
Alerts Report	Intervention Reports
Cases Report	Intervention Reports
Enrollment Census Report	Intervention Reports
Progress Reports Report	Intervention Reports

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The Report Results display.

Report Results

Search in Results														
<input type="checkbox"/>		STUDENT NAME		EMAIL		STUDENT ID		ALTERNATE ID		CATEGORIES		TAGS		MAJORS
<input type="checkbox"/>		Johnson, David		djohnson@woodley.eab.edu		59610487		20705620		Financial Aid, Attended imp...		Have Planned As of 121323		

0 selected

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Creating a Pivot Table





Set your rows, columns, and values. In this example, the row is Opened By, the value is count of Student Names, and the column is value.

Fields

Drag and drop fields to arrange

All fields

☒ Alert Reasons

☒ Alternate ID

☒ Assigned Staff

☒ Campaign Name

☒ Care Unit

☒ Case Assignees (u...

☒ Categories

☒ Classification

Report filters

Student Name

Email

Student ID

Rows

Opened By (user list)

Drop field here

Columns

Status

Σ Values

Drop field here

Values

Count of Student N... Σ√

Drop field here

CANCEL

APPLY

Once you have set your fields, click **Apply**. Next, re-save your report by selecting **Save As...** and then saving the report.

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.

Tile Name *

Select Saved Report *

Cases - All Time × ✓

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

Select View i

Chart Summary (Aggregated) ✓

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 so. If you have not created a table view, the application will not create the tile using this view with your saved report.

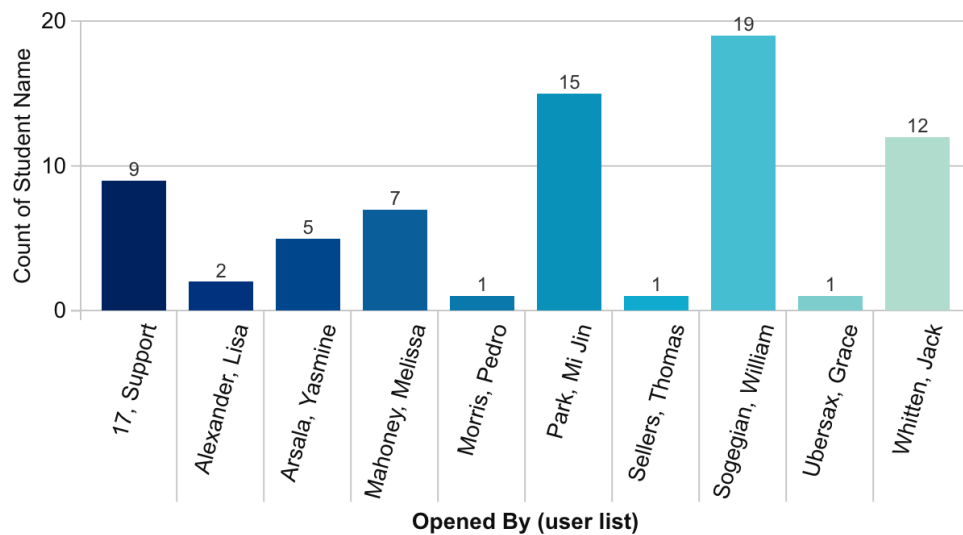
After selecting these options, click **Save Tile**. The tile will now appear on Staff Dashboard.

Who Opened the Cases?

[Cases - All Time](#)

Last Refresh: 10/01/2024 11:11 AM ET

Count of Student Name ▾



● Open