My Dashboard

Help Center Manager

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What: The Dashboard is a new beta 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.

Where: Open the Dashboard by selecting the My Dashboard button in Navigate 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. This feature must be turned on by EAB. To enable this feature, contact Partner Support at NavigateTechSupport@eab.com.

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Feature Video

Dashboards 20.2.10 Release.mp4

Feature Overview

Dashboards

Dashboards are designed to help you be more productive and strategic when managing your unique student caseload. The first released version gives you an at-a-glance, actionable information about students who are assigned to you and an overview of ongoing or recent activity.
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. If staff users do not have the View Alerts permission, alerts do not show in the Activity Feed. If a user cannot see Predicted Support Level, that graph does not show on the Dashboard.

There are seven tiles available on the Dashboard. 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.

My Assigned Students

Note. You must have permission to see Predicted Support Level to see the chart below.
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.

- Students by Support Level. This option displays your assigned students by high, medium, low, or undefined Predictive Support Level in either a donut chart or a tabular list. If you click on a segment you see a list of students in that segment.
- Enrolled in [This Term]. This option displays students assigned to you that have enrolled in the current term, as defined by your SIS.
- Enrolled in [Next Term]. This option displays students assigned to you that have enrolled in the next term, as defined by your SIS.
• Appointments Completed – Last 90 Days. This option displays students assigned to you that you have met, or not met with, in the past 90 days.

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. You only see the activities you have permissions to see. For example, you only see Alerts Issued if you can see Alerts on your students.

<table>
<thead>
<tr>
<th>Date</th>
<th>Student Name</th>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/05/21</td>
<td>Rhonda Lehmann</td>
<td>appointment with Michael Figueiredo</td>
<td>10:00AM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changing a Minor</td>
<td></td>
</tr>
<tr>
<td>10/06/21</td>
<td>James Bratcher</td>
<td>appointment with Steven Kilpatrick</td>
<td>6:30AM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Declaring a Minor</td>
<td></td>
</tr>
<tr>
<td>10/01/21</td>
<td>Genevieve Shalash</td>
<td>appointment with Karen Mccatty</td>
<td>12:00PM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changing a Major</td>
<td></td>
</tr>
<tr>
<td>09/06/21</td>
<td>Michael Smith</td>
<td>appointment with Geraldine Anderson</td>
<td>10:00AM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changing a Major</td>
<td></td>
</tr>
<tr>
<td>07/02/21</td>
<td>Patricia Konkel</td>
<td>appointment with Alexander Gale</td>
<td>2:00PM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changing a Major</td>
<td></td>
</tr>
<tr>
<td>05/07/21</td>
<td>Florence Turner</td>
<td>appointment with James Franco</td>
<td>2:30PM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Resolving a Hold</td>
<td></td>
</tr>
<tr>
<td>03/31/21</td>
<td>Philip Silver</td>
<td>appointment with Tamela Benedict</td>
<td>3:00PM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Academic Planning</td>
<td></td>
</tr>
<tr>
<td>03/16/21</td>
<td>Richard Arnold</td>
<td>appointment with Roxie Richard</td>
<td>9:00AM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changing a Major</td>
<td></td>
</tr>
</tbody>
</table>

The activities included in the feed are:

- Alerts Issued
- Case Opened or Closed
- Notes Added
- Progress Reports Added
- Appointment Summaries Added
- Appointments Scheduled
- 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.

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**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. It opens the Staff Home page.
Clicking the student's name opens their Student Profile in a new tab.

**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.
Clicking the student's name opens their Student Profile. You can also see all your recent appointments by selecting the All Recent Appointments 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 Tabular shows this information in list form.
Staff can change the term in the My Enrolled Students tile by clicking the hamburger icon. A filter with all available terms opens.
My Appointment Campaigns

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

<table>
<thead>
<tr>
<th>Name</th>
<th># Students</th>
<th>Appointments</th>
<th>Attendance</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2021 registration</td>
<td>9</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Degree Progress and Planning</td>
<td>03/19/2021 - 06/03/2021</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each active Appointment Campaign in the list 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.

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.

Related Articles

Staff Home

Appointment Summaries

Campaigns: Appointment Campaigns

Campaigns: Enrollment Campaigns

Student Success Predictive Model
Hello! Does the "My Appointment Campaign" section only appear for the user who created the campaign? I'm finding that the campaign only shows up on my dashboard because I created it and does not appear for the counselor tied to the campaign. Thank you for your help!

Hi Chanthy,

Yes, you're right that it will appear for the creator of the campaign.

Best,

Bonnie (Partner Support Team)