

Navigate360: Staff Dashboard

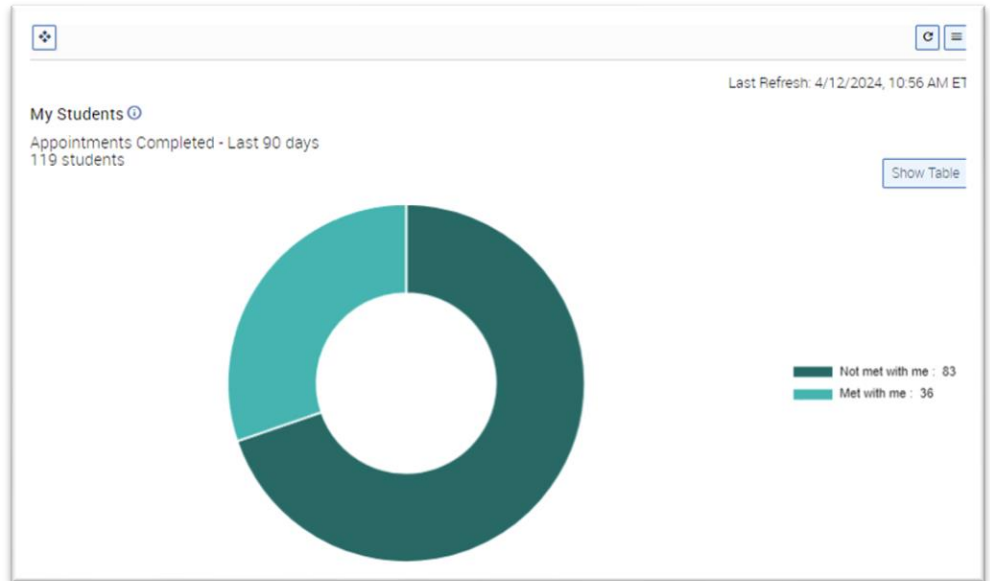
The Staff Dashboard is a feature designed to give Staff users an at-a-glance, actionable information about assigned students and an overview of ongoing/recent activity.

1. Open the dashboard tool


- Dashboards are designed to help Staff users be productive and strategic at-a-glance when managing their caseload. There are six customizable options or drawers to design a dashboard:

- **My Students:**

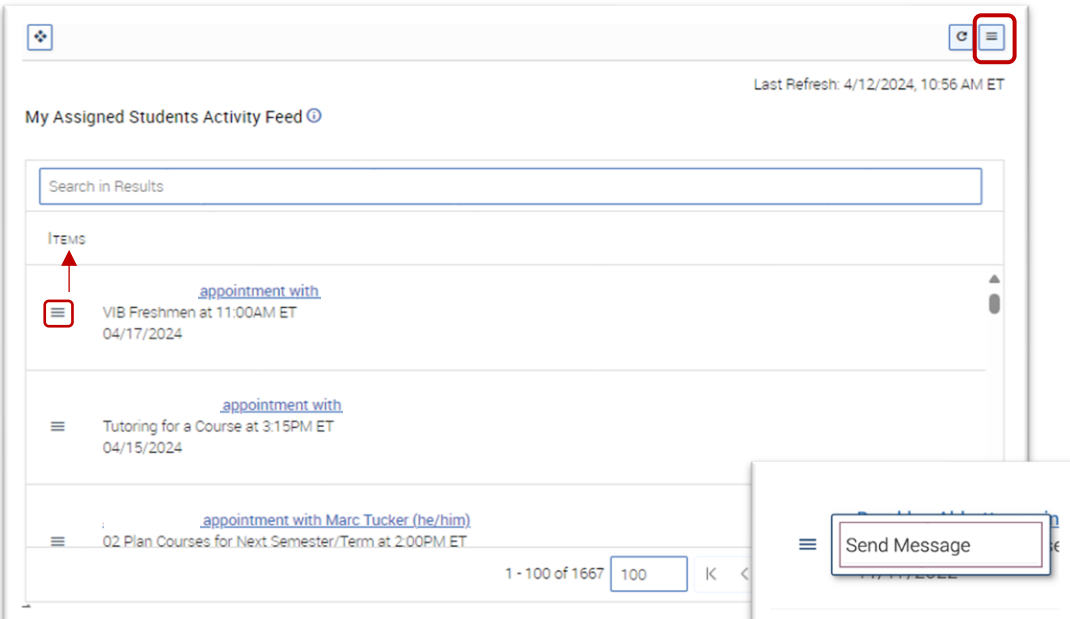
Shows users a chart to view a summary about user's assigned students, including appointment status over the last 90 days and support scores. Use the toggle to view data in a tabular format or click on the chart elements



to view associated students in each category.

- **My Assigned Students Activity Feed:** View activity for assigned students, including newly assigned students, their upcoming and past [Appointments](#), new or closed [Alerts/Cases](#), [Progress Reports](#), [Notes](#), and [Appointment Summaries](#). Click the  hamburger icon to apply the activity filter to see

in the feed. Click the hamburger icon next to an item to send a message to the student.



| Item | Date |
|--|---|
| appointment with VIB Freshmen | 11:00AM ET 04/17/2024 |
| appointment with Tutoring for a Course | 3:15PM ET 04/15/2024 |
| appointment with Marc Tucker (he/him) | 02 Plan Courses for Next Semester/Term at 2:00PM ET |

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- **My Appointment Summaries Pending:** View your appointments in the last 90 days without an [Appointment Summary](#). Clicking the student's name opens their Student Profile. You can click the hamburger menu in front of the student's name to open the Actions Menu or the [All Recent Appointments](#) link to manage recent appointments.

My Appointment Summaries Pending

Last Refresh: 4/12/2024, 01:24 PM ET

Appointments Needing Summaries - Last 90 days | [All Recent Appointments](#)

Search in Results

| DATE | STUDENT | SERVICE |
|------------|---------|------------|
| 04/12/2024 | | 02 Plan Co |

My Appointment Summaries Pending

Appointments Needing Summaries - Last 90 days | [All](#)

Search in Results

| DATE | STUDENT |
|------|-----------|
| | (SMS-D... |
| | (SMS-D... |

Send Message

Create an Appointment Summary Report

- **My Appointment Campaigns:** View all of your active [Appointment Campaigns](#) and their associated performance metrics. Click on the campaign name to view details. Selecting the [View All](#) link opens the Appointments Campaigns page in Navigate.

My Appointment Campaigns

Last Refresh: 4/12/2024, 10:56 AM ET

Active Appointment Campaigns [View All](#)


Search in Results

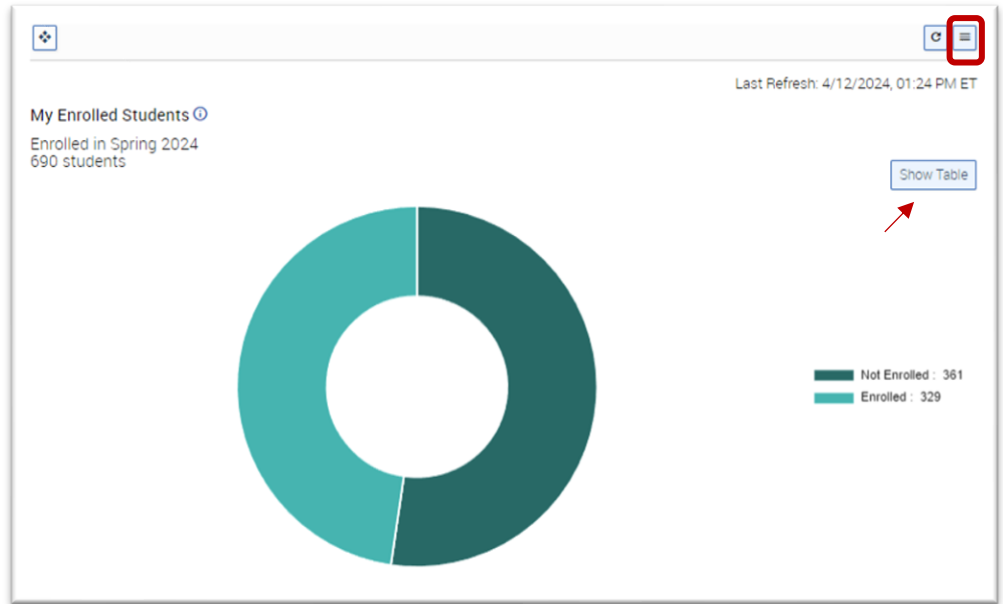
| NAME | SERVICE | DATES | # STUDENTS | SCHEDULED |
|---|------------------------------|-------------------------|------------|-----------|
| Fall 2024 LS Advisem... | 02 Plan Courses for Next ... | 03/11/2024 - 04/26/2024 | 10 | 20% |
| Fall 2024 YAGC Advisem... | 02 Plan Courses for Next ... | 03/11/2024 - 04/26/2024 | 38 | 60% |


1 - 2 of 2 | 100 | K < 1 > >

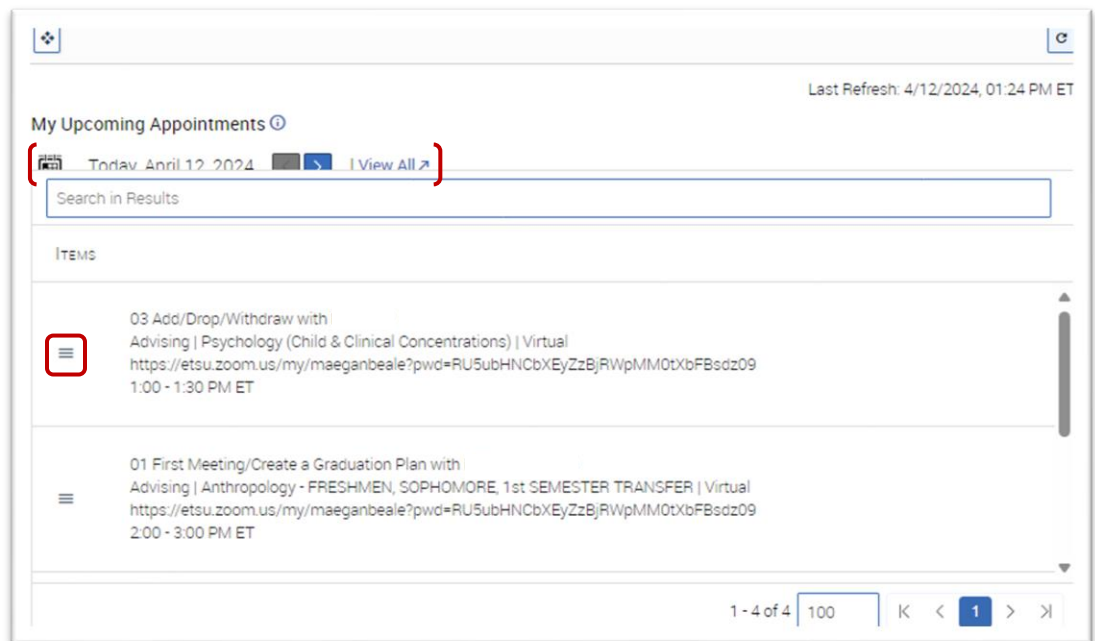
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The Staff Dashboard is a feature designed to give Staff users an at-a-glance, actionable information about assigned students and an overview of ongoing/recent activity.

- **My Enrolled Students:** View enrollment data on your assigned students for the current and next term. Click the hamburger icon  to select term view. Select term on the chart to view more details. Click [Show Table](#) to see the information in list form.



- **My Upcoming Appointments:** View all upcoming [Appointments](#). Staff can change the date for the tile and view all appointments by selecting the [View All](#) link. It opens the Staff Home page. Click the hamburger icon  beside an item to [Send a Message](#), create an [Appointment Summary Report](#), or [Manage Appointment](#) from the dashboard.






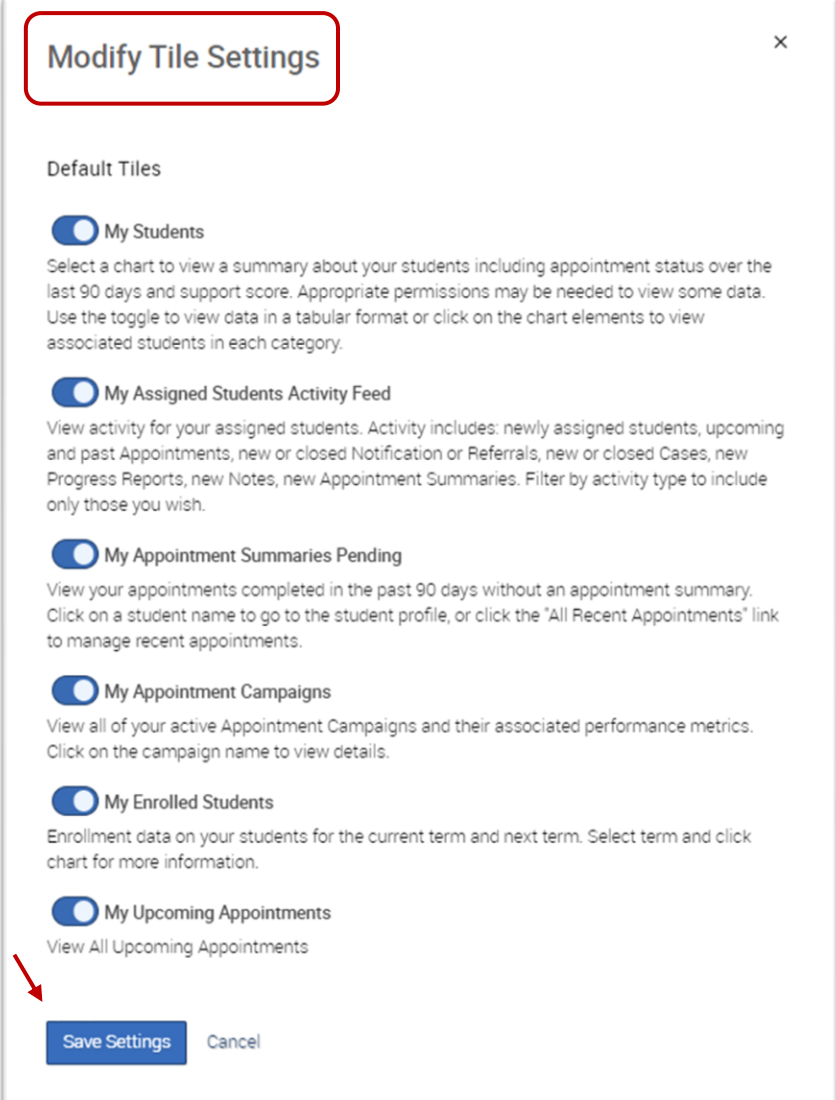
| Appointment | Time |
|--|-------------------|
| 03 Add/Drop/Withdraw with Advising Psychology (Child & Clinical Concentrations) Virtual https://etsu.zoom.us/my/maeganbeale?pwd=RU5ubHNcBxEyZzBjRWpMM0tXbFBsdz09 | 1:00 - 1:30 PM ET |
| 01 First Meeting/Create a Graduation Plan with Advising Anthropology - FRESHMEN, SOPHOMORE, 1st SEMESTER TRANSFER Virtual https://etsu.zoom.us/my/maeganbeale?pwd=RU5ubHNcBxEyZzBjRWpMM0tXbFBsdz09 | 2:00 - 3:00 PM ET |

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2. Customize tiles and settings

- Users can adjust the layout of *My Dashboard* by using the  button to drag widgets and lists to arrange the dashboard accordingly.
- Click on the *Settings* button and drawer,  to open *Modify Tile Settings* and turn on or off tiles
 - **NOTE:** Toggling the tile to the left will turn the off the tile, removing it from a user's dashboard. Tiles can be turned off and on at any time.
- Click *Save*
 - **NOTE:** Users can refresh data on any tile by clicking the  icon. Each tile has a label informing users of the date and time it was last refreshed.



Modify Tile Settings

Default Tiles

- My Students**
Select a chart to view a summary about your students including appointment status over the last 90 days and support score. Appropriate permissions may be needed to view some data. Use the toggle to view data in a tabular format or click on the chart elements to view associated students in each category.
- My Assigned Students Activity Feed**
View activity for your assigned students. Activity includes: newly assigned students, upcoming and past Appointments, new or closed Notification or Referrals, new or closed Cases, new Progress Reports, new Notes, new Appointment Summaries. Filter by activity type to include only those you wish.
- 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 "All Recent Appointments" link to manage recent appointments.
- My Appointment Campaigns**
View all of your active Appointment Campaigns and their associated performance metrics. Click on the campaign name to view details.
- My Enrolled Students**
Enrollment data on your students for the current term and next term. Select term and click chart for more information.
- My Upcoming Appointments**
View All Upcoming Appointments



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 "All Recent Appointments" link to manage recent appointments.

Tile is OFF