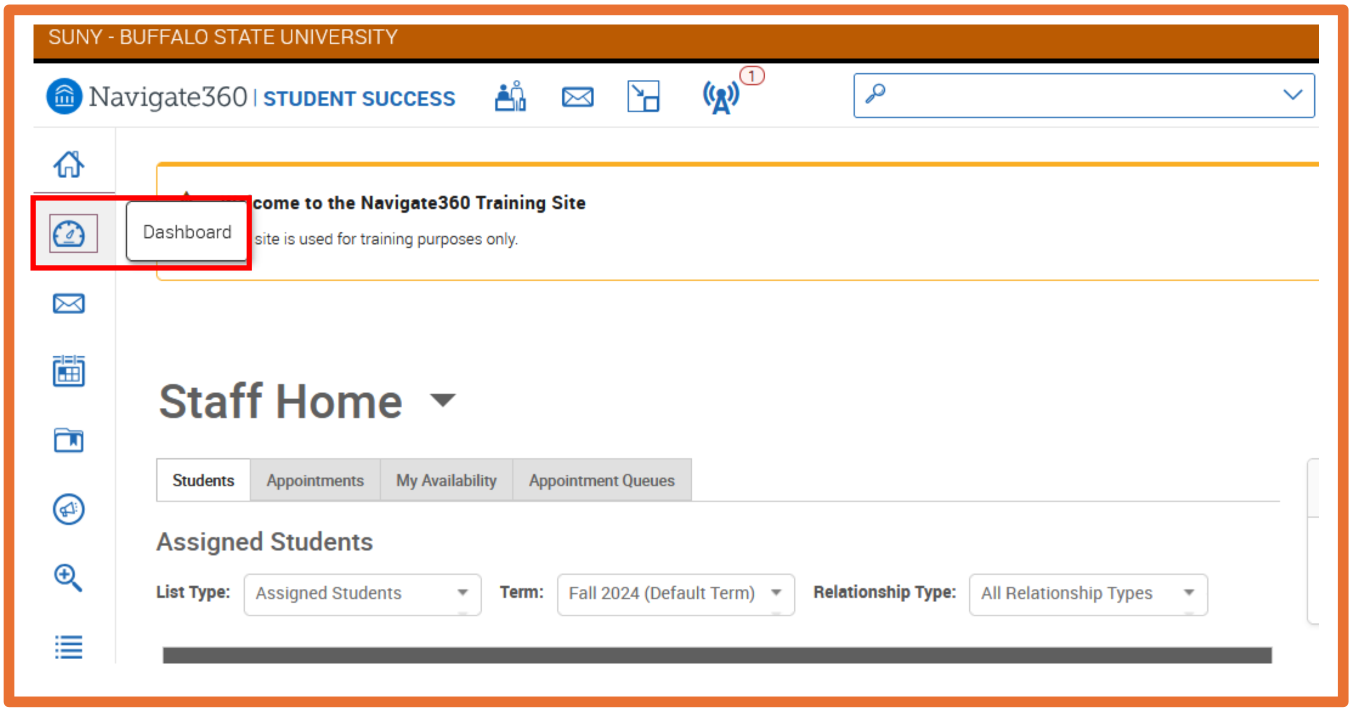
Navigate: Understanding Your Staff Dashboard

You can access your **Dashboard** by clicking on the Dashboard icon on the left-hand side of your navigation toolbar. 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.



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My Dashboard

My Dashboard enables staff members to efficiently manage their student caseloads by providing a customizable, at-a-glance view of critical student information and activities.

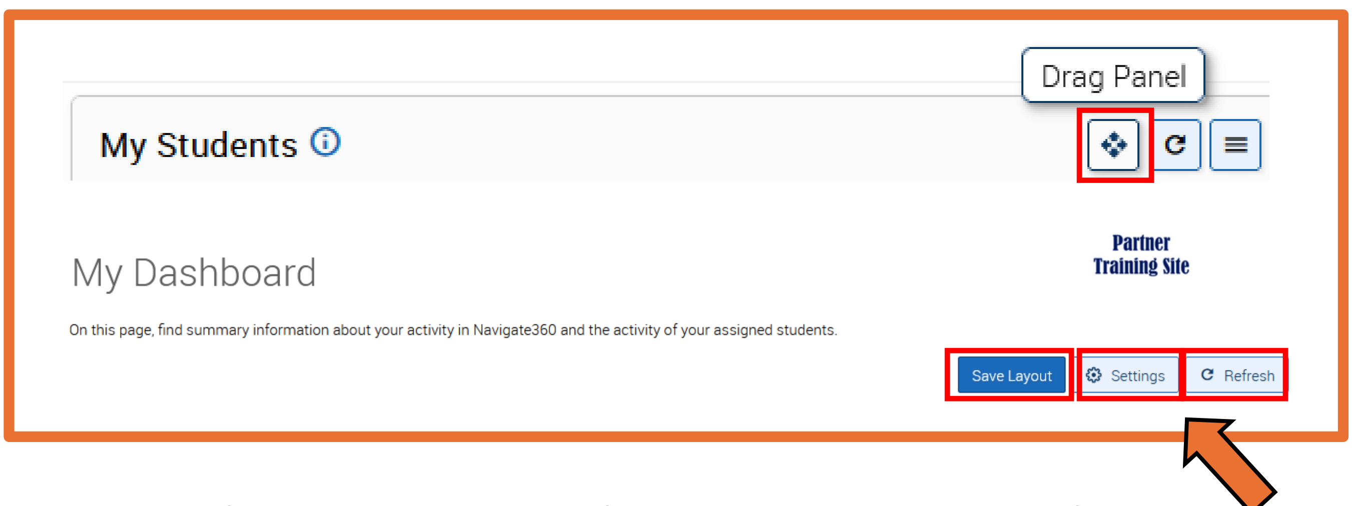
The Staff Dashboard is a feature designed to give you an at-a-glance, actionable information about students who are assigned to you and an overview of ongoing or recent activity. On this page, you will find summary information about your activity in Navigate and the activity of your **assigned students**.

Your My Dashboard Componenets

There are seven pre-created tiles available on the Dashboard:

1. My Students
2. My Assigned Students Activity Feed
3. My Upcoming Appointments
4. My Appointment Summaries Pending
5. My Enrolled Students
6. My Active Appointment Campaigns
7. My Enrollment Campaigns

You can adjust the layout of your **My Dashboard** tiles 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.

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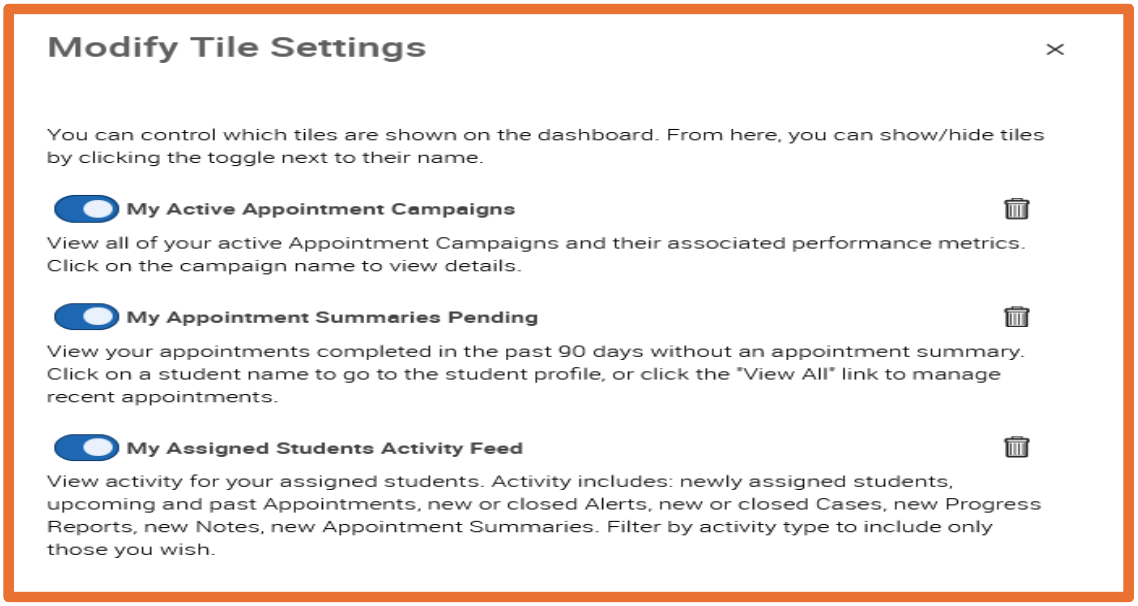
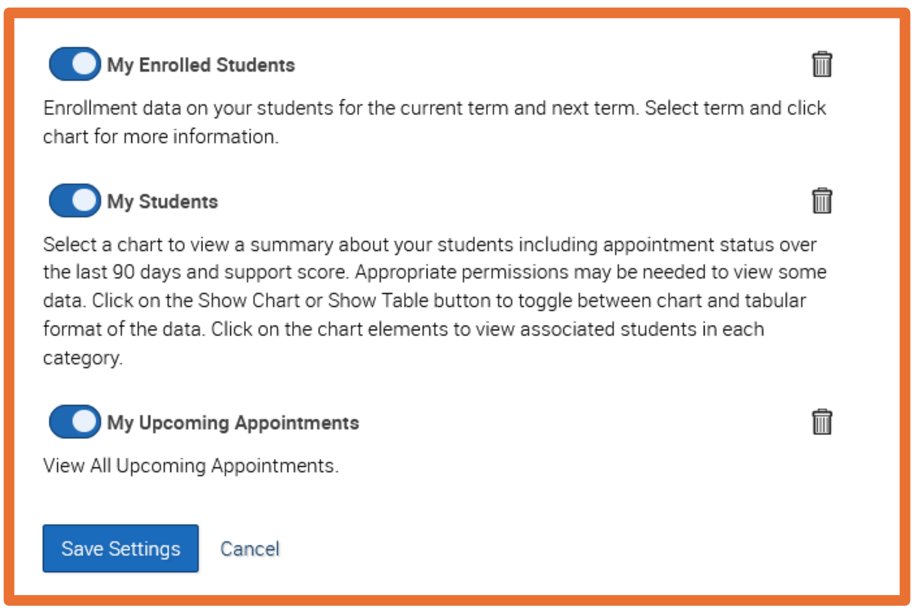
The **Settings** button allows you to take two actions: **Add Tile**, and **Modify Tile Settings.** Modifying Tile Settings allows the user to choose which tiles, including custom tiles, appear on their personal dashboard.





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.

My Active Appointment Campaigns - View all of your active Appointment Campaigns and their associated performance metrics. Click on the campaign name to view details.

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.

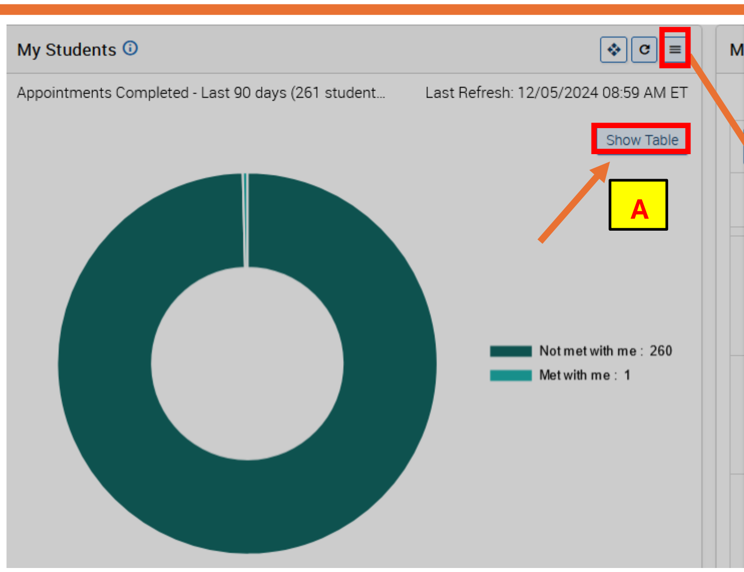
My Assigned Students Activity Feed - View activity for your assigned students. **Activity includes:** newly assigned students, upcoming and past Appointments, new or closed Alerts, new or closed Cases, new Progress Reports, new Notes, new Appointment Summaries. Filter by activity type to include only those you wish.

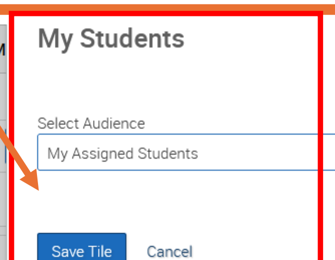
My Enrolled Students - Enrollment data on your students for the current term and next term. Select term and click chart for more information.

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. Click on the **Show Chart** or **Show Table** button to toggle between chart and tabular format of the data. Click on the chart elements to view associated students in each category.

My Upcoming Appointments - View all upcoming Appointments.

1. **My Students** - 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.





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.

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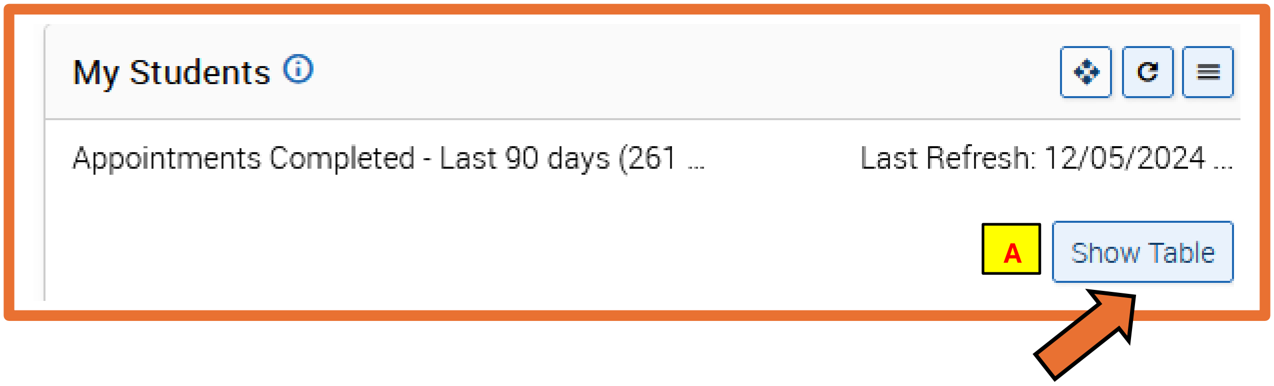

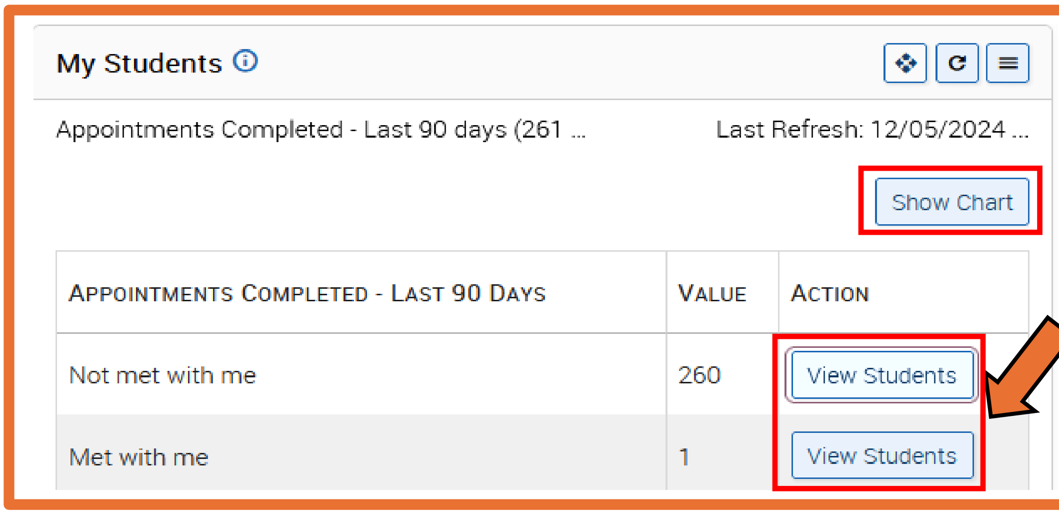

If you click on **View Students,** you can view the following information: **Student Full Name**, **Banner ID, Major**, and **GPA**.

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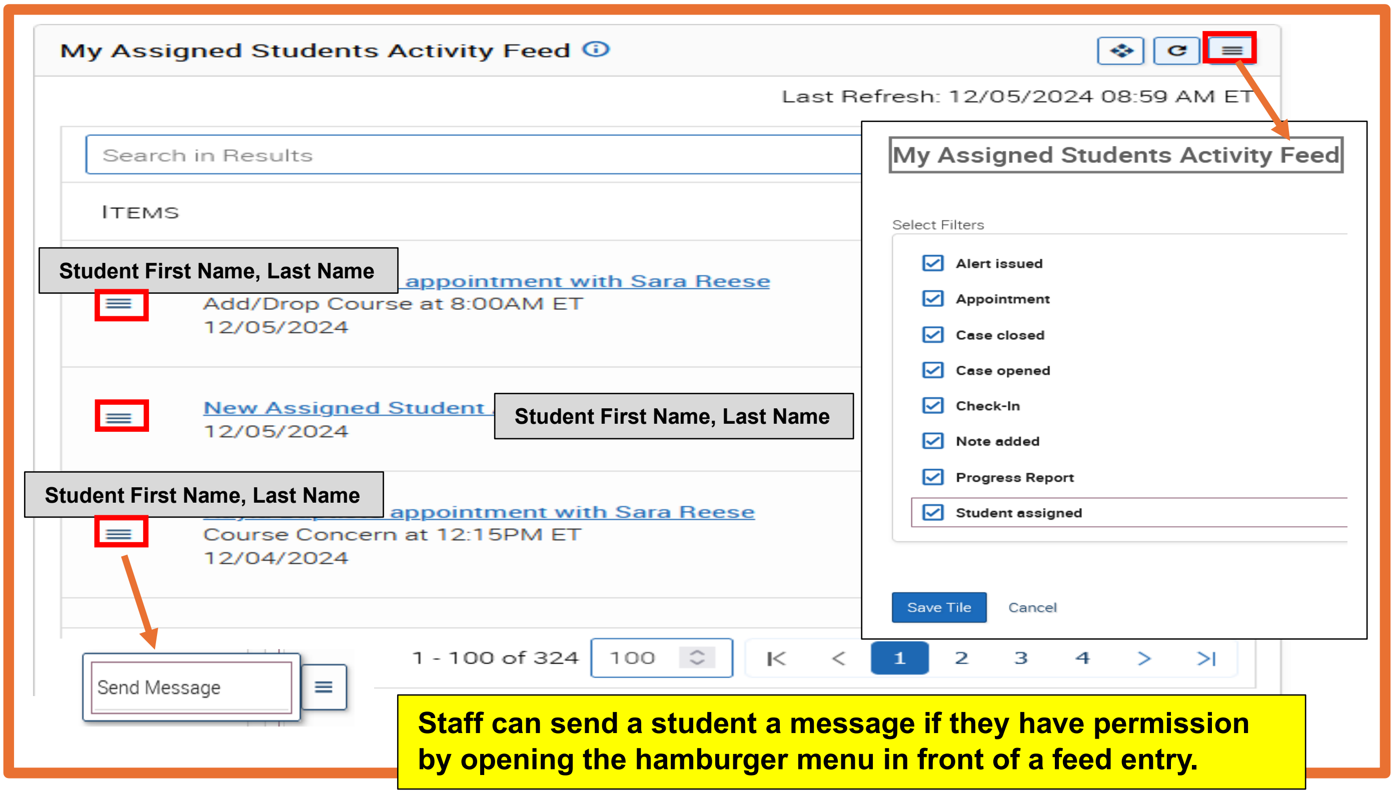
2. **My Assigned Students Activity Feed**

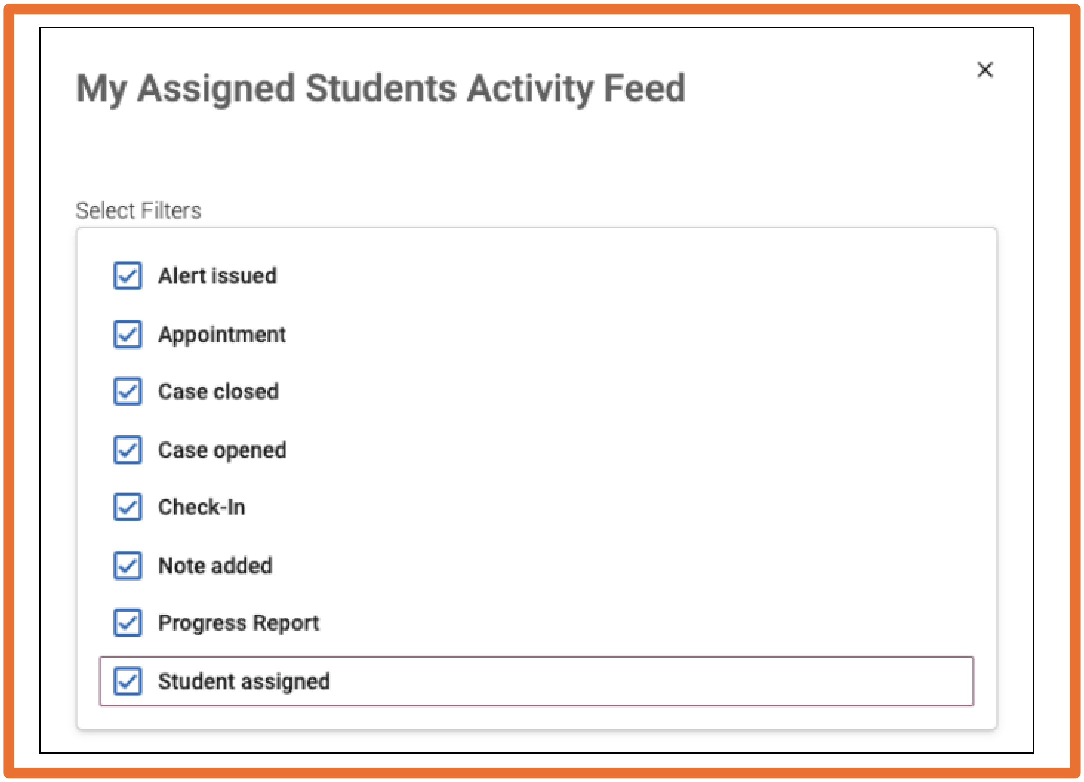
This tile is an **aggregated list of activity for your assigned students**. Only the student activities you have access to (permision to see) will display in this list. For example, you only see Alerts Issued if you can view Alerts on your students.



The activities included in the feed are:

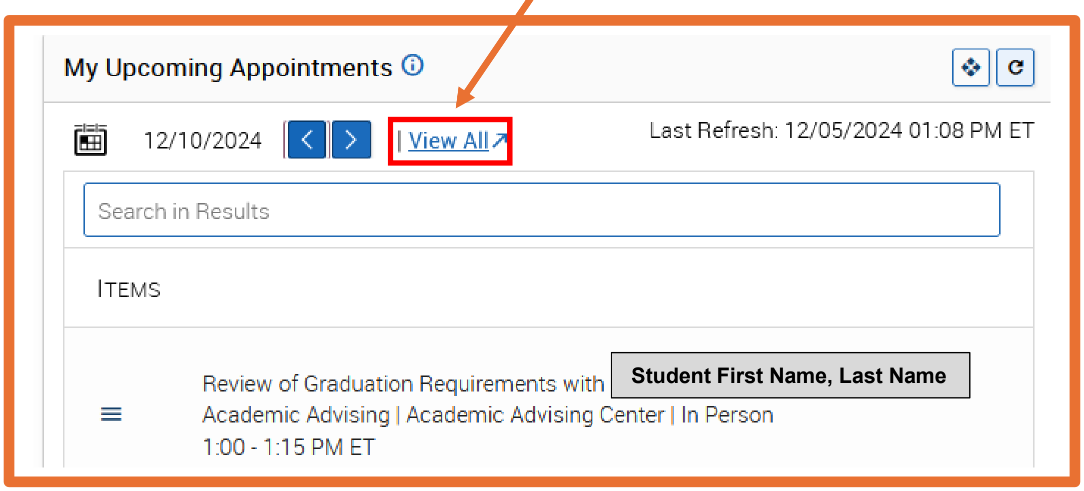
- Alert Issued
- Appointment Scheduled
- Case Closed
- Case Opened
- Check in
- Note Added
- Progress Reports Added
- New student assigned to you

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.



3. **My Upcoming Appointments**

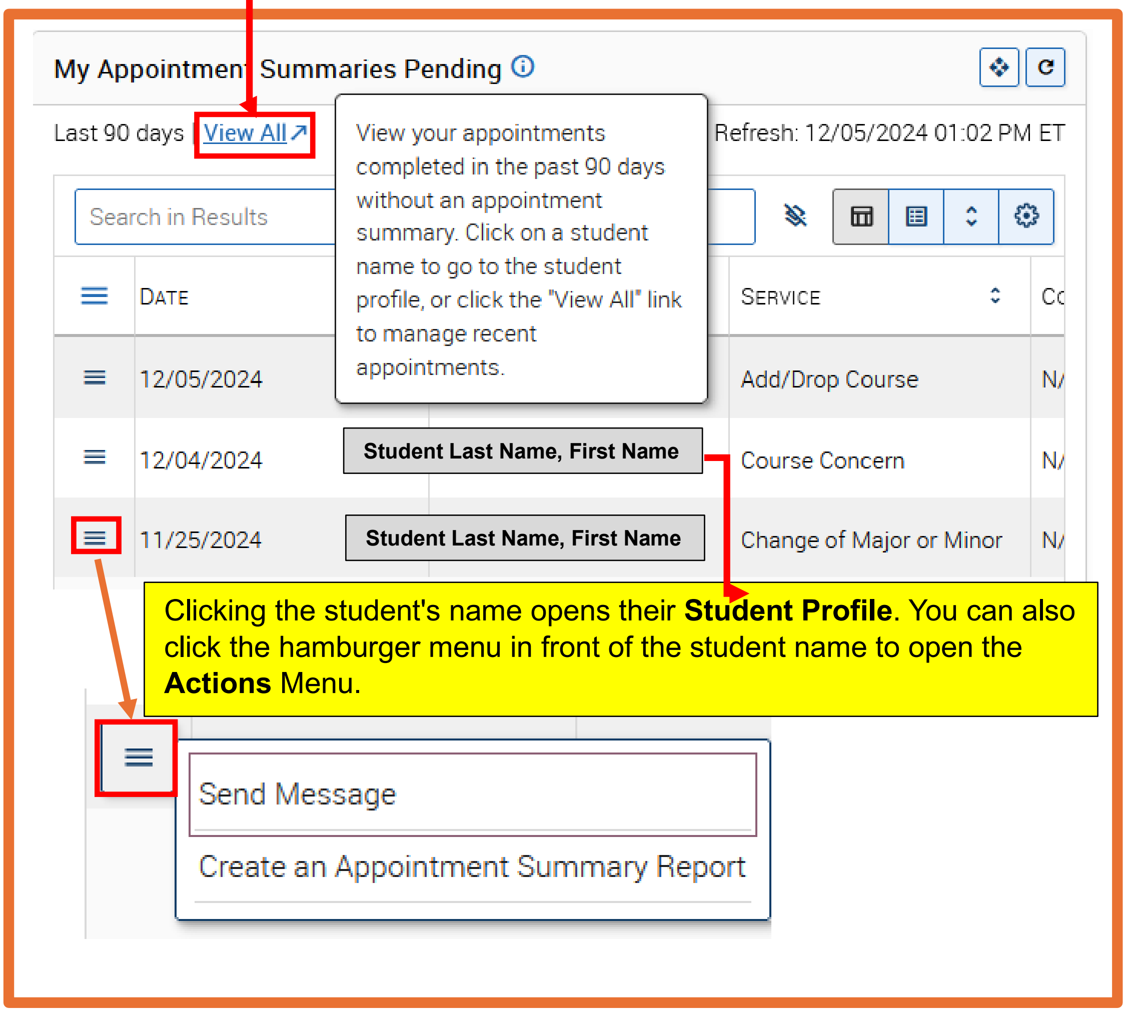
   This tile shows a list of **Upcoming Appointments** for the staff member. Staff can change the date for the tile and view all appointments by selecting the **View All** link, which opens the **Staff Home** page.



4. My Appointment Summaries Pending

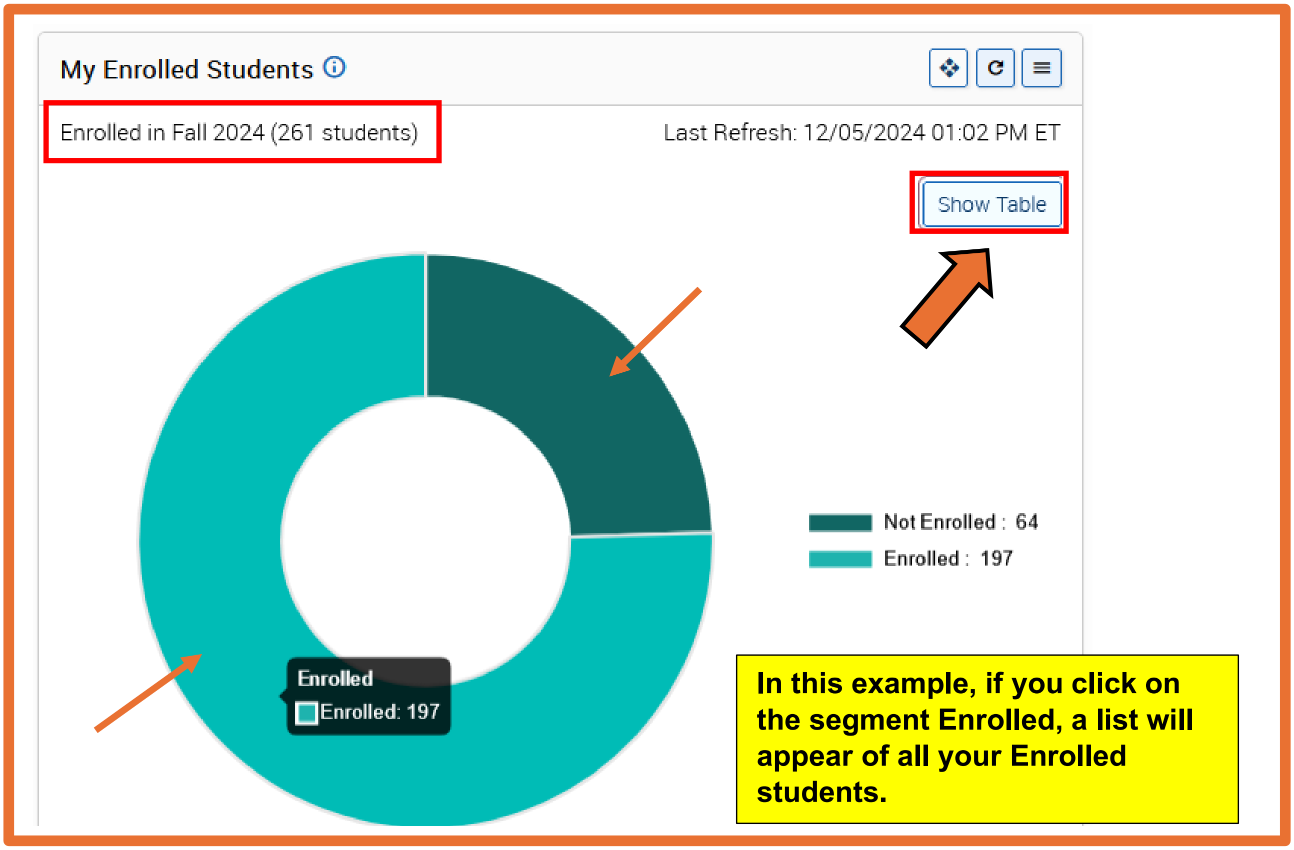
This tile shows a list of appointments you had in the **past 90 days** that do not have **Appointment Summaries**. In this case, it does not matter if the student you met with was assigned to you or not.

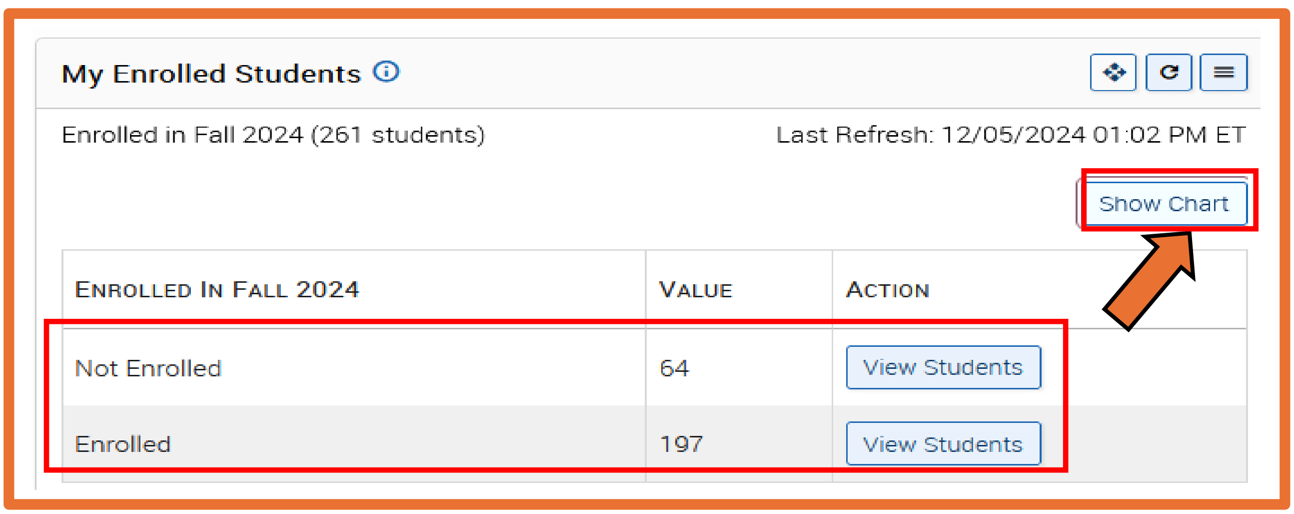
You can also see all your recent appointments by selecting the **View All** link on the tile.



5. 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.





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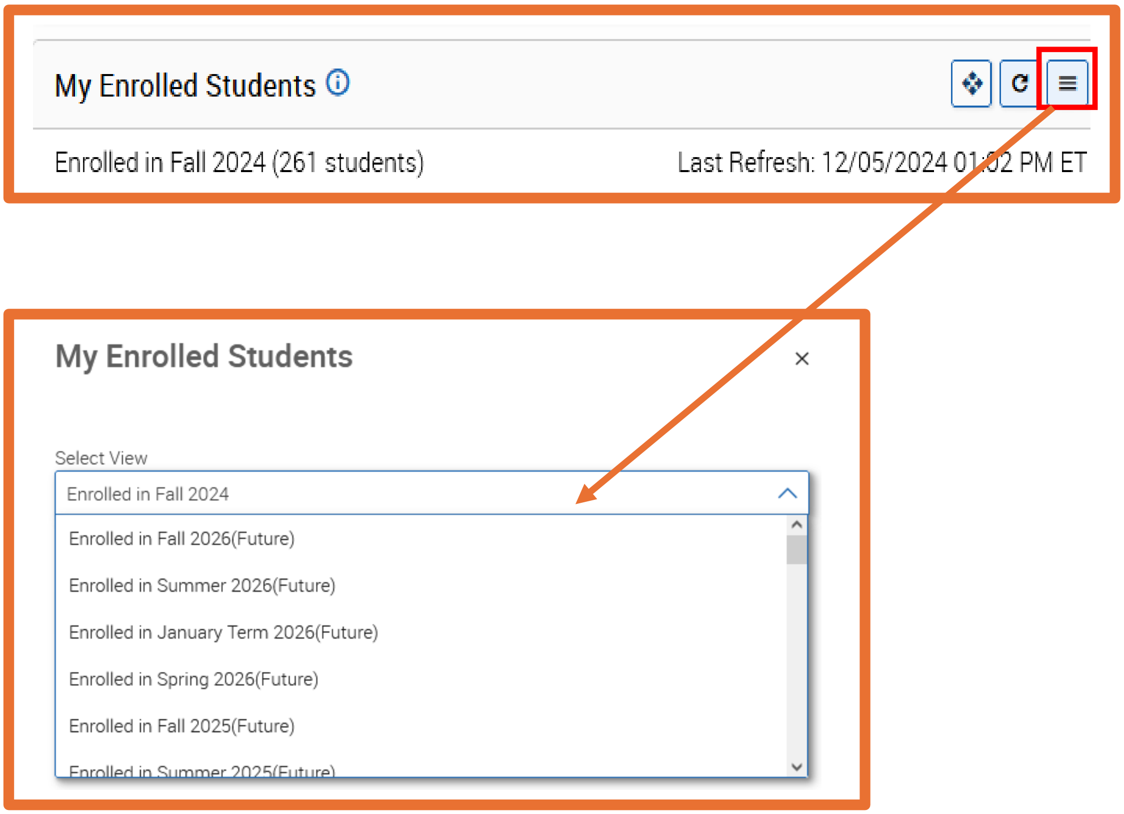
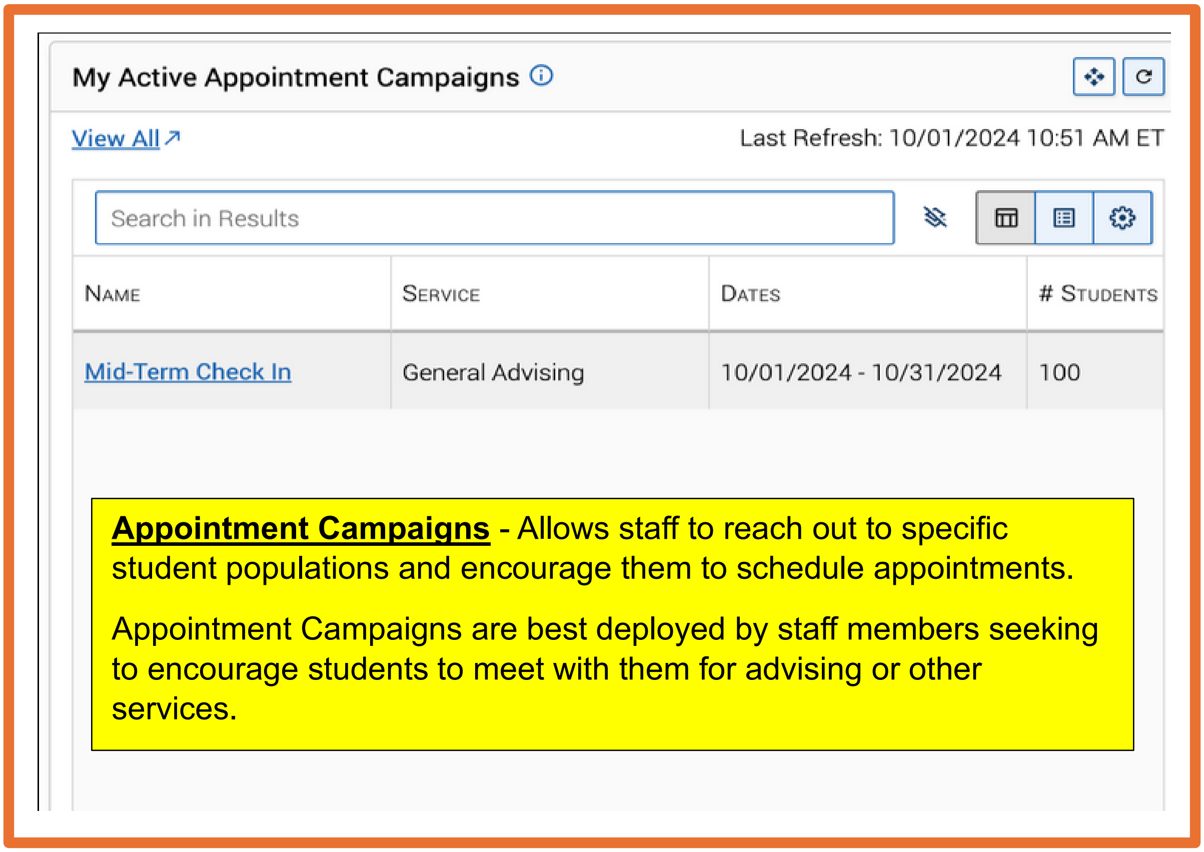
Staff can change the term in the **My Enrolled Students** tile by clicking the Hamburger icon. A filter with all available terms opens.



6. **My Active 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 Navigate.

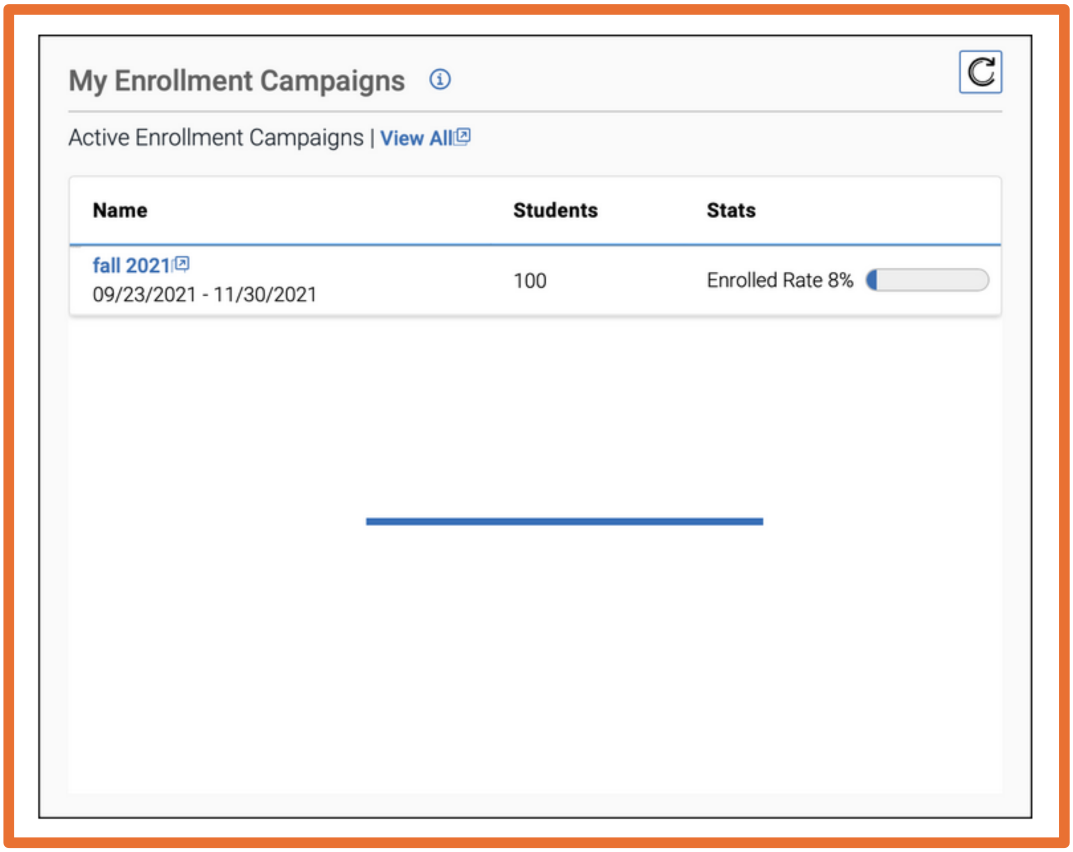


Each **Active Appointment Campaign** on the tile includes the following associated metrics:

1. Number of Students
2. Appointments Scheduled
3. Attendance Rate
4. Appointment Summaries Created

7. **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:

1. Number of Students
2. Stats

The stat shown is the Enrollment Rate of students in the campaign.