

[Help Center](#) > [Product Updates](#) > [Strategic Care Release Notes](#)

 Search

Navigate Staff Platform 23.1.14 Release Notes



Help Center Manager

21 days ago · Updated

[Follow](#)

Note. This release will be 23.1.14.1 in your site due to back-end changes that will not affect your Navigate site.

Pillar: Strategic Care, Recruitment Management, Navigate Staff

Training Release: 31 July 2023

Prod Release Date (Expected): 10 Aug 2023 (Prod A) / 11 Aug 2023 (Prod B)

Release Note Summary: Updates regarding SFTP domains, email domains, and SMS messaging. Fixing bugs throughout Navigate Staff. For Recruitment Management, linking student and prospect profiles, deleting Prospect Profile warnings, and the ability to create appointments for prospects.

Table of Contents

- [Announcements](#)
 - [SFTP Server Domain Update](#)

- [Email Domains from Navigate Update](#)
- [SMS Messaging Update](#)
- [Navigate Staff](#)
 - [Student Profile](#)
 - [Fixes](#)
- [Recruitment Management](#)
 - [Appointment Center](#)
 - [Data Imports](#)
 - [Prospect and Student Profiles](#)

Announcements

SFTP Server Domain Update

We are working with partners currently using the [imports.gradesfirst.com](#) server for SFTP imports to transition to a new SFTP server: [sftp.campus.eab.com](#). We are also working with partners to update any usernames that are less than 3 characters to comply with a new requirement for usernames to be at least 3 characters.

Email Domains from Navigate Update

As mentioned in the [23.1.8.1](#) and [23.1.5 release notes](#), Navigate has added the ability to update the email domain for all automated emails that come from the Navigate platform. Unless your institution has proactively requested to use the new [@navigate.eab.com](#) domain via our Partner Support Team, those emails currently use the [@gradesfirst.com](#) domain. We are updating that domain to [@navigate.eab.com](#) for all partners as of this release.

No action is needed from a technical standpoint. You also do not need to make changes to your institutional safe senders list. Any users that have any rules set up in their local email client using the [@gradesfirst.com](#) domain will need to update those or create new rules using the [@navigate.eab.com](#) domain.

SMS Messaging Update

Major US carriers have implemented Application-to-Person 10-digit long code (A2P 10DLCs) regulations in response to the recent [CAN-SPAM act](#). Because of changes to carrier regulations that will result in enhanced ability for carriers to detect misused and spam on their networks, EAB has gone through a process to register your schools usage of text messaging in Navigate, with the carriers

as a “campaign”. As a premium service provider, EAB will manage this entire process for you. More information can be found in the [Text Messaging](#) article in the Help Center.

We are experiencing delays in registration approval from the [National Campaign Registry](#) caused by a backlog with downstream carriers and providers. EAB will be reaching out to all impacted institutions shortly.

Navigate Staff

Student Profile

Always Display Start and End Date for Course Sections

Navigate made some changes to the way course meeting times are displayed to better accommodate online or asynchronous courses. We removed the requirement for courses to have or display meeting days and times in order to display the start and end dates for a course throughout the platform, including on the Professor Home page, Courses tab on the Student Profile page, and Courses tab on the Student Home page.

Navigate now always shows start and end dates on the course listing for professors, staff, and students.

Fixes

- Fixed an issue where Campaigns with a large number of nudges (50+) were getting 504 errors when trying to view Campaign details.
- Fixed an issue where when staff responded to an Appointment Notification email, the message would not be received by the student or captured on the Conversations page.

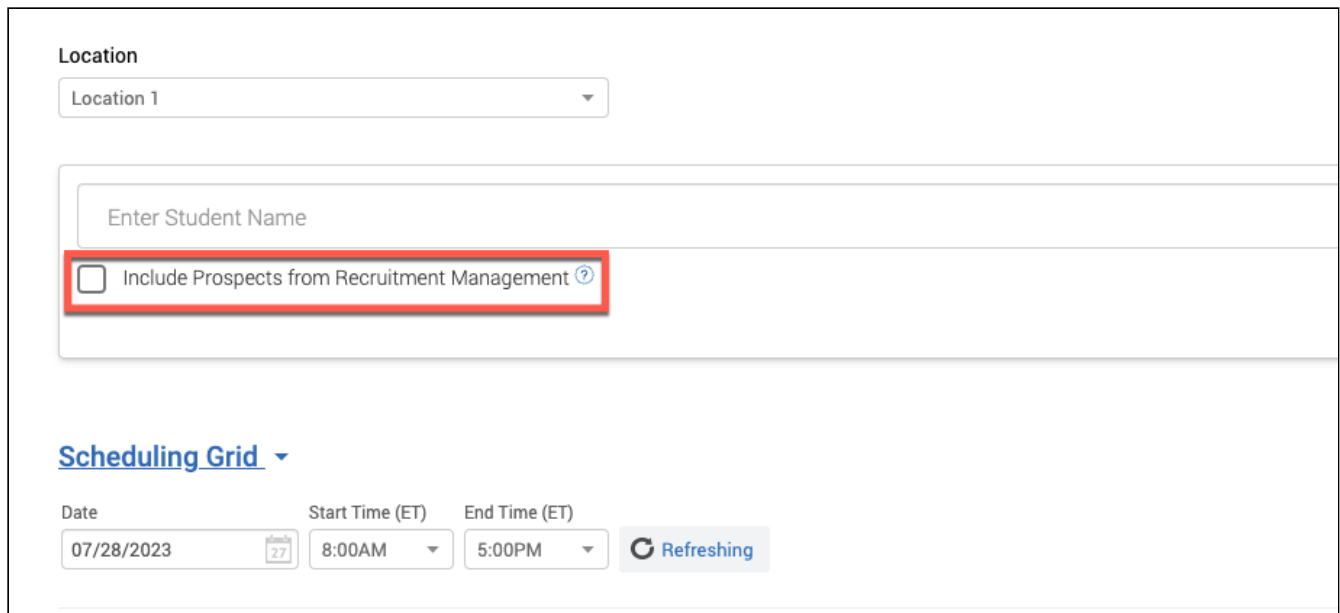
Recruitment Management

Appointment Center

Staff Can Check In Prospects Using Appointment Center

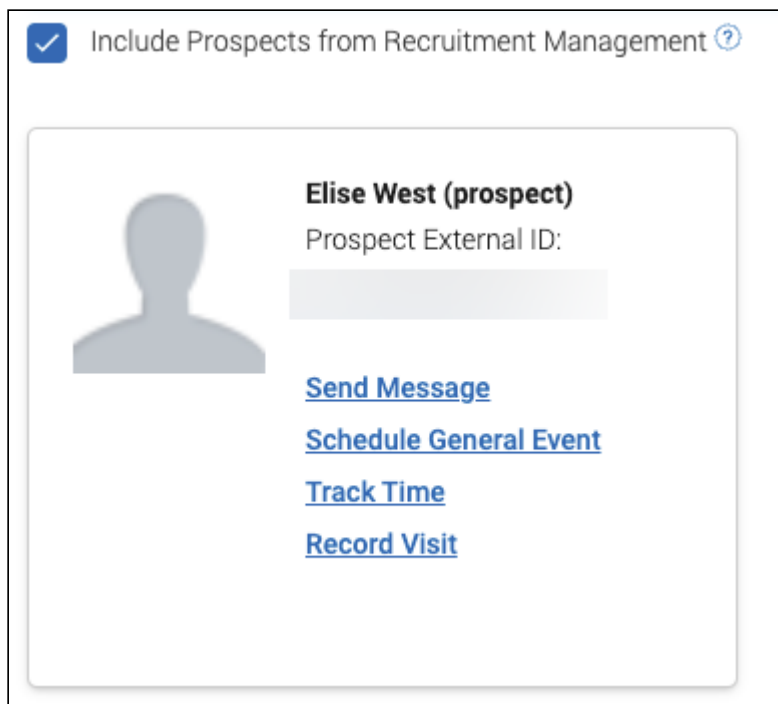
Staff can check in prospects using Appointment Center once the 23.1.14 release is on your production site.

Once this feature is active, there is a new checkbox on the Appointment Center called *Include Prospects from Recruitment Management*. Note that only unlinked profiles in Recruitment Management will be included.



The screenshot shows the Appointment Center interface. At the top, there is a 'Location' dropdown menu set to 'Location 1'. Below that is a search bar with the placeholder text 'Enter Student Name'. A checkbox labeled 'Include Prospects from Recruitment Management' with a help icon is highlighted with a red border. Below the search bar is a 'Scheduling Grid' section with a dropdown arrow. The scheduling grid includes fields for 'Date' (07/28/2023), 'Start Time (ET)' (8:00AM), and 'End Time (ET)' (5:00PM), along with a 'Refreshing' button.

After finding the prospect, staff can take action on them in Appointment Center as they can for students; e.g. by sending a message, recording a visit, or scheduling a general event. Some actions will not be available for prospects.



The screenshot shows a prospect profile card. At the top, the checkbox 'Include Prospects from Recruitment Management' is checked. Below the checkbox is a profile card for 'Elise West (prospect)'. The card includes a placeholder for a profile picture, the name 'Elise West (prospect)', and the label 'Prospect External ID:' followed by a redacted field. Below the profile information are four action buttons: 'Send Message', 'Schedule General Event', 'Track Time', and 'Record Visit'.

Data Imports

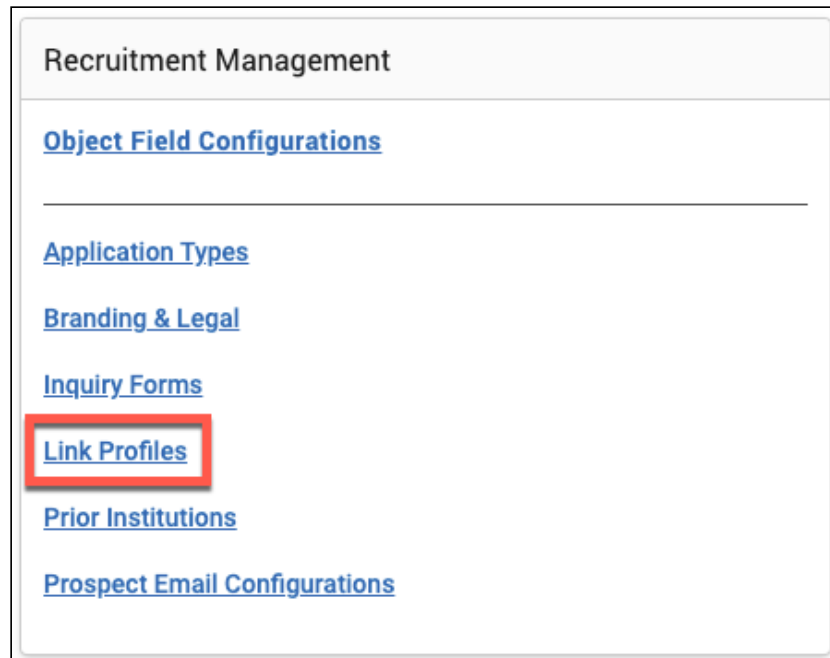
Deleting a Prospect Record

Deleting a prospect via the Imports page now informs you that deleting a Prospect Record also deletes all records associated with a prospect, including activities, applications, application documents, and notes. There will also be a validation message warning you of the consequences of deleting a prospect. Prospects will also be removed from all lists. None of the deleted records can be recovered, so if you want to delete a prospect, make copies via reports of all information on a prospect.

Prospect and Student Profiles

Profile Linking in Recruitment Management

To configure the Profile Linking feature, there is a new link **Link Profiles**, in the Recruitment Management section of the Admin page. This page manages linking between Prospect Profiles and Student Profiles.



The **Link Profiles** page displays details of the latest linking process and then the criteria for matching Prospect and Student Profiles. Option 1 is by using the Student ID ONLY. Option 2 uses the Student ID and if it is not found, uses First Name, Last Name, and Date of Birth to match profiles. The First Name, Last Name, and Date of Birth must match exactly between the profiles for them to be linked

[Administration](#) > [Link Profiles](#)

Link Profiles

Manage linking between Prospect Profiles and Student Profiles.

Profiles will be automatically linked using the selected matching criteria related to the Prospect Profile in Recruitment Management AND Student Profile in Navigate Staff. To manage linked profiles, use the Prospect Report Type.

Latest Linking Process Details

Profile Link Settings Last Updated At: 04/28/2023 at 9:39am CT

Last Full Run Started At: N/A

Last Full Run Completed At: N/A

Matching Criteria

Option 1: Student ID Only

IF Student ID is present on the Prospect Profile AND matches the Student ID on a Student Profile THEN we will link the profiles.

| FIELD ON PROSPECT PROFILE | MATCHING FIELD ON NAVIGATE STUDENT PROFILE |
|---------------------------|--|
| SIS Student ID | Student ID |

Option 2: Student ID OR First Name, Last Name, Date of Birth

First, we check if Criteria 1 is true. If so, then the profiles will be linked. If Criteria 1 is false, then we use Criteria 2 to link profiles. If neither is true, profiles will not be linked.

Criteria 1: IF Student ID is present on the Prospect Profile AND matches the Student ID on a Student Profile THEN we will link the profiles.

| FIELD ON PROSPECT PROFILE | MATCHING FIELD ON NAVIGATE STUDENT PROFILE |
|---------------------------|--|
| SIS Student ID | Student ID |

IF NOT THEN

Criteria 2: IF ALL fields below match on both profiles THEN we will link the profiles.

| FIELD ON PROSPECT PROFILE | MATCHING FIELD ON NAVIGATE STUDENT PROFILE |
|---------------------------|--|
| First Name | First Name |
| Last Name | Last Name |
| Date Of Birth | Date of Birth |

Profile Link Settings

Switching this configuration to No Linking will only prevent future linking. It will not remove links between existing linked profiles.

* Choose Matching Criteria for Linking Profiles

- No Linking
- Option1: Student ID Only
- Option2: Student ID OR First Name, Last Name, Date of Birth

[Save](#) [Cancel](#)

Finally, there are the Profile Link Settings. By default, this is set to *No Linking*. Users with access can set the option to Option 1 or 2 if they choose to and then select **Save** to save changes.

Updates happen only once a day if profiles are matched on First Name/Last Name/Date of Birth. If based on student ID, they happen any time an import with Student ID is added.

Once profiles are linked, staff can select the link at the top of the Prospect Profile. Clicking the link opens the Pre-Enrollment History tab.

Prospect Summary

Staley, Rico

Last Modified by Elise West at 07/07/2023 at 4:56pm ET

Primary Email: rstaley111@yahoo.com | Primary Phone: 301-567-5309 | Location: | Primary Enrollment Counselor: Elise West | Prospect Type: - | Prospect PM ID: prs26

Linked Navigate Student Profile [Rico's Profile](#)

Prospect Status [Prospect](#) | Inquiry | Incomplete Application | Submitted Application | Reviewed Application | Accepted Application | Denied Application | Admitted | Matriculated

Schools can also manually link profiles in RM by opening the Details by selecting the Modify Linked Profile link and using the Student ID. Staff can manually unlink profiles from the Details page of Prospect Profile once linked.

Linked Navigate Student Profile

[Rico's Profile](#)

[Modify Linked Profile](#) [Unlink](#)

Note. Once profiles are linked, Navigate will not unlink them. Your institution must manually unlink them.

Information from the Prospect Profile for an enrolled student show on the *Pre-Enrollment History* tab. Additionally, you should have the *View Pre-Enrollment History Tab* permission and the *View Prospects* and *Create and Edit Prospects* permissions if you are going to link profiles.

Students with both prospect and student profiles for your school will have the Pre-Enrollment History tab, visible if the staff user has the permission. If there is no information in the Prospect Profile or the profiles have not been linked, this tab will have no information.

Tom Raider

- Overview
- History
- Pre-Enrollment History**
- Courses
- More ▾

Pre-Enrollment History

The data in the sections below are from the Prospect Profile in Recruitment Management. If permissions allow, go to the Prospect Profile to modify items or change the Linked Prospect Profile listed.

Linked Prospect Profile [?](#)

[Tom's Prospect Profile](#) [↗](#)

Inquiries

Search in Results 🔍 🗒️ ⚙️

There are no inquiries for this prospect.

1 - 0 of 0 ⏪ ⏩ ⏴ ⏵

Activities

Search in Results 🔍 🗒️ ⚙️

| PROSPECT NAME | TYPE | CREATED AT | CREATED BY |
|---------------|------|------------|---------------|
| Rico Staley | Tour | 07/28/2023 | Support 50118 |

1 - 1 of 1 ⏪ ⏩ 1 ⏴ ⏵

Notes

Search in Results 🔍 🗒️ ⚙️

| PROSPECT NAME | Body | HAS ATTACHMENT |
|---------------|-------------------------------|-----------------------------------|
| Rico Staley | Tom sent another email today. | <input type="button" value="No"/> |

1 - 1 of 1 ⏪ ⏩ 1 ⏴ ⏵

In a future release, information about linked prospect profiles will show in Navigate Reports.

Users can also run the Prospects Report in Recruitment Management and filter so that only prospects with linked profiles show in the results. Running this report and selecting Unlink Student Profile from the Actions menu is a way to unlink profiles.

Data Filters

+ Add Filter + Share These Filters

Filters Logic: Match all Filters (AND) Results must match ALL filters: 1

| Field * | Condition | Value * |
|--------------------|-----------|---------|
| Has Linked Profile | is | True |

Run Report

Report Results

Search in Results

| | FULL NAME | FIRST NAME | MIDDLE NAME | LAST NAME | SUFFIX | SALUTATION | PRIMARY PHONE |
|--------------------------|-----------|------------|-------------|-----------|--------|------------|---------------|
| <input type="checkbox"/> | | Rico | | Staley | | | 301-567-5309 |

- Assign Prospect
- Add to a Prospect List
- Go to Profile
- Unlink Student Profile

Was this article helpful?

0 out of 0 found this helpful

Still have questions after reading this article? Check out our [Community](#) where you can discuss Navigate functionality and best practices with both others users and EAB staff!

Return to top

Comments

0 comments



Be the first to write a comment.

Help Center