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Navigate360 Staff Platform - STA 25.17 Release Notes

[Help Center Manager](#)

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Parts of Navigate360 Impacted: Navigate360 Staff Platform**Training Release Date:** 11 August 2025**Prod Release Dates (Expected):** 18 August (Prod A) / 20 Aug 2025 (Prod B)**General Availability Dates:** 19 Aug 2025 (Prod A) / 21 Aug 2025 (Prod B)

Release Note Summary: Expanded merge fields for sending nudges and messages. Introduction of Student Profile Agent, a new AI feature for all partners. Updates to Knowledge Agent and Web Embed Agent Administration pages for partners with the NavAI module. Fixes and minor enhancements across the platform.

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New Features & Enhancements

Automations, Campaigns, Email Messaging

Expanded Merge Fields for Campaign Nudges and Messages in Navigate360

To improve the effectiveness of staff communications to students in Navigate360 for Student Success, we have expanded the number of merge fields available to our users. These expanded merge fields are based on columns from our V3 Reports. Specifically for Student Success, the fields are pulled from the Student Report and include categories, assigned staff, and more. The fields are available in all campaign nudges and Send Message actions. This includes Send a Message automations.

Important! To have initial action to the expanded merge fields, the user needs to have access to the V3 Students Report. If the user has access to the report, they are granted access to expanded merge fields automatically at the time of release and the permission to do so is added to their

user account. If the user or role does not have access to this report, they will need permission for the Students Report granted to them as well as the *Use Expanded Merge Tag* permission in the Administration section of the Edit Role page.

- ☐ Allow User to Update Sender Email Settings in Student Success
- ☐ Allow User to Update Sender Email Settings in Recruitment Success
- ☐ Allow User to Update Sender Email Settings in Advancement Success

☒ Use Expanded Merge Tags[?]

User Administration Permissions

- ☐ Create a Student
- ☐ Create New Users
- ☐ Edit All Users
- ☐ Delete Users

Expanded merge fields are available when creating nudges for any student-facing campaign type or Event. Users can search the merge fields to find the one they want as well. Along with the fields from the Student Report, any campaign-specific fields such as the Schedule Link are also available in

Message *

Paragraph ▾ **A** ▾ A ▾ A≡ ▾ A↑ ▾ **B** *I* | 🔗 ⋮ ▾

1/2 ▾ ≡ ▾ ↶ ↷ | 📎 | 📅 ▾ Merge Tags ▾

- Recipient Name
- Recipient First Name
- Recipient Last Name
- Personal Availability Link
- Email Signature

▾ Enhance with AI ⓘ

Add Attachment:

As part of the changes, instead of the preview email or send email sample showing a value in the field, the merge field name displays instead, as shown here.

Preview Email

{{ Student First Name }}, Schedule an Advising appointment

Please Schedule Your Advising Appointment.

Hello {{ Student First Name }} :

Please schedule an appointment for the Advising Center at the EAB Success Quad. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser.
<https://sigma.campus-qa-blue-mt.eab.com/a/123456>

Thank you!

Student with questions?

Please contact your assigned advisor for assistance. Assigned advisors information and access can be found on the advising tab in mySFA.

If your institution is using Custom Attributes, the Preview displays the "friendly" name even though the Message composition field displays, e.g. *custom_attribute_1*.

Compose Message

▼ Apply a Template

Subject *

{{student_first_name}}, Schedule an Advising appointment

Message *

Paragraph

Please Schedule Your Advising Appointment.

Hello {{student_first_name}} :

Please schedule an appointment for Academic Planning at Academic Advising Center. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{{schedule_link}}

{{custom_attribute_1}}

{{custom_attribute_2}}

Preview Email

{{ Student First Name }}, Schedule an Advising appointment

West Bear University

Please Schedule Your Advising Appointment.

Hello {{ Student First Name }} :

Please schedule an appointment for Academic Planning at Academic Advising Center. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

[Schedule an Appointment](#)

You can also copy and paste this address into your web browser.
<https://eab-651d-development.gradesfirst.test/a/123456>

{{ Favorite Color }}

{{ Favorite IceCream }}

Thank you!

EAB Navigate360

Logo

Note that sending messages to staff also allows for Merge Fields; however, these are much more limited. If sending a message to a mixed group of staff and students, users should only have access to the staff merge fields.

Send a Message

Email

Text

To: Walt Disney (he/him), GTutor1 GTutor1

▼

Apply a Template

ⓘ

Subject *

Message *

Paragraph

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Merge Fields

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Enhance with AI

ⓘ

Search merge fields

Message Fields

Recipient Name

Recipient First Name

Recipient Last Name

As mentioned above, expanded merge fields can also be used when creating a Send a Message automation. These work just as they would with campaign nudges and sending messages.

Send Email

Send Text

Send Email

▼

Apply a Template

ⓘ

Subject *

Message *

Paragraph

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Merge Fields

▼

Search merge fields

Students Report Fields

Student Name

Email

Student ID

Alternate ID

Categories (Comma List Format)

Tags (Comma List Format)

Majors (Comma List Format)

Classification

Assigned Staff (Semicolon List Format)

NavAI

Web Embed Agent Administration

We have made a few changes to the Embed Bot Administration section to make it clear which bot is being worked on. First, the customized name now displays when the user selects an agent to configure. Also, "Embed Bot" no longer display on the Preview button now that the customized name displays on the Admin screen heading.

Embed Bot #2 Administration

[Preview](#)[Customize](#)[View Javascript Snippet](#)

Other changes include the Documents and Web Sources table not referencing "Embed Bot", including removing the name from the Add Document and Edit Document panel along with the Add Web Source, Edit Web Source, or Details for Web Source panels. These changes help support partners using multiple versions of the Web Embed Agent. For questions about additional Web Embed Agents, reach out to Navigate360TechSupport@eab.com.

Student Profile Agent

Navigate360 introduces [Student Profile Agent](#), which staff can use to ask questions about their students and can be used to prepare for appointments, synthesize key student information, or gain updates about a student. Student Profile Agent summarizes key data points about the student with data accessible in V3 reports. This new AI feature is accessible on a Student Profile for users with the *AI Student Profile Agent* permission. By default, this feature is enabled for super users only. Application Administrators can update user role permissions to grant access to the Student Profile Agent to other roles.

NavAI

☒ AI Content Generation and Message Enhancement?

☒ AI Filter Assistant?

☒ AI Report Finder?

☒ Knowledge Bot for Recruitment Success?

☒ Administration for Knowledge Bot?

☒ Administration for Course Planning Agent?

☒ Administration for Embed Bot?

☐ AI Student Profile Agent?

☒ View Individual Student Chat Logs?

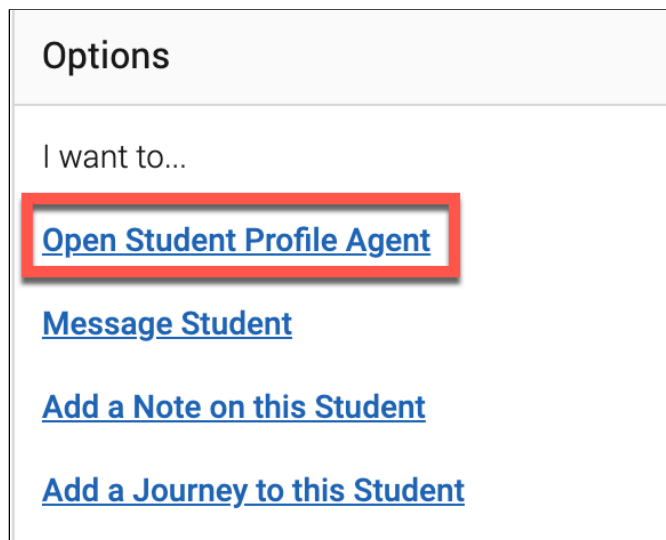
Student Permissions

☐ Enable Knowledge Bot for Students?

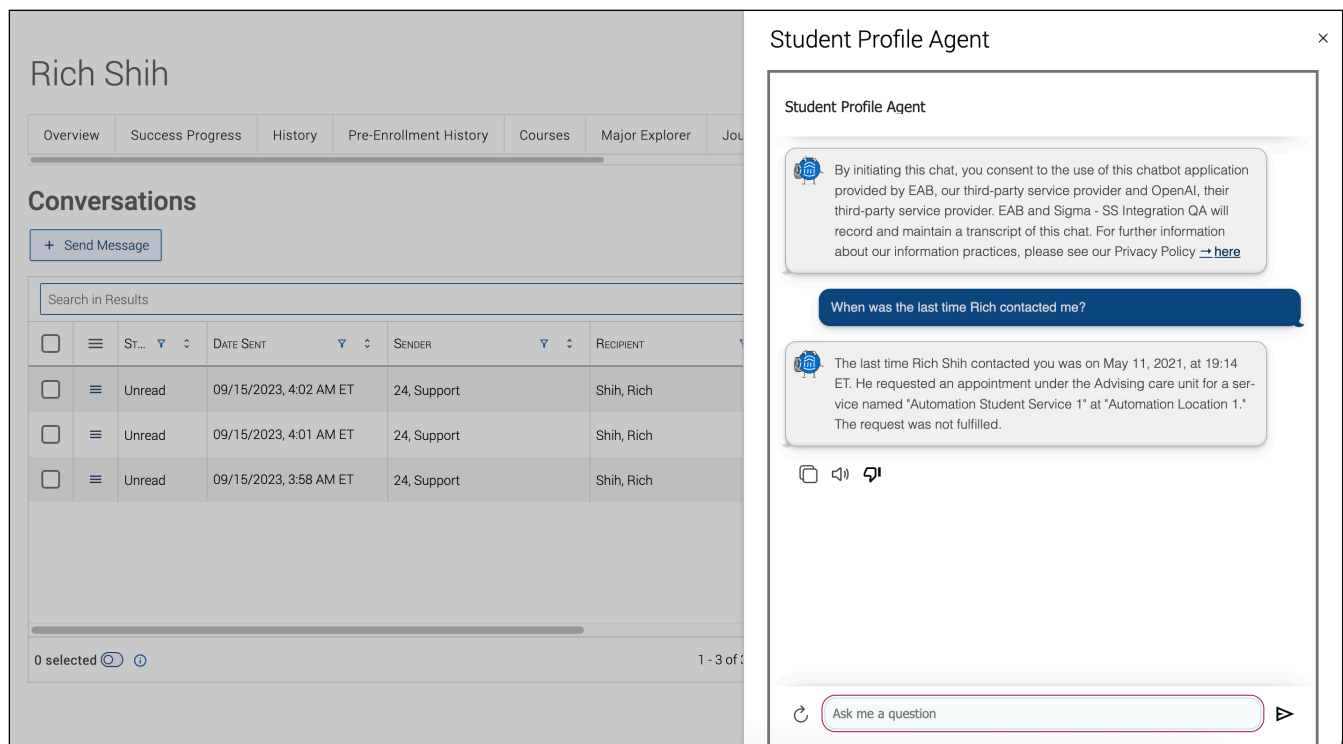
The Student Profile Agent pulls upon three sources to answer users questions: data within V3 reports associated with that student, data in the Conversations tab of the student's profile, and Staff To-Do's. The Student Profile Agent will only return answers with student data to which the user already has access through V3 reports.

Note that we strongly recommend giving access to Student Profile Agent to users that already have V3 report access, as otherwise staff users do not get the full value of Student Profile Agent. We also recommend that if a staff user can view certain Student Profile data via the student profile but does not have access to the corresponding V3 report that your application administrator give access to the corresponding V3 report with necessary restrictions so they can take advantage of the Student Profile Agent capabilities.

If a user has access to Student Profile Agent, it appears in the **Options** menu in the Student Profile.



When selected, the Student Profile Agent opens in a new panel. Users can enter questions, which will be answered by the Student Profile Agent.



Staff users can take two actions from Student Profile Agent with the correct permissions:

- Adding a to-do about the student
- Scheduling an appointment with the student

The [Student Profile Agent Administration](#) article covers the permissions staff users need to view information about the student at length and our recommendations as well.

Other

Appointment Summary text can now be copied and pasted elsewhere without having to go into Edit Report mode first.

Fixes

Various Fixes

- Fixed an issue where Content Templates were loading irregularly across the platform.
- Fixed an issue where an internal user ID was displaying in the Notes Export instead of the expected user ID.
- Fixed an issue where saved V3 reports do not keep boolean values.
- Fixed an issue where Web Source jobs configured on the Knowledge Bot Administration and Embed Bot Administration pages that contained multiple exclude URL sections were not processing successfully.

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