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# Navigate360 Staff Platform: STA 26.1 Release Notes



Help Center Manager

1 month ago · Updated

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**Parts of Navigate360 Impacted:** Student Success, Reports, Staff Tasks

**Training Release Date:** 12 January 2026

**Prod Release Dates (Expected):** 14 Jan 2026 (Prod A) / 20 Jan 2026 (Prod B)

**General Availability Dates:** 15 Jan 2026 (Prod A) / 21 Jan 2026 (Prod B)

**Release Note Summary:** This release focuses on the end of legacy reports in the Navigate360 platform, Staff Tasks, a more prominent place for our Filter Assistant and Report Finder, and fixes to the platform.

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## Announcements

### Release Timing Note

Starting with the STA 26.2 release, partners will notice an adjusted biweekly training release day. Planned training site releases will move to Thursdays. Production site releases will continue on Mondays and Wednesdays. The biweekly cadence remains unchanged. Final release dates are always subject to change; please note specific dates and updates on release notes. This change provides additional time for EAB testing and review before updates reach partner sites. This update also provides space for incremental hotfix releases on off weeks to accommodate critical changes to production environments.

The release naming convention for 2026 will follow the formula STA.26.XX.YY. This is the same convention used in previous years, with the year indicator shifting from 25 to 26. The components mean the following:

- 26 is the calendar year
- XX is the sequential major release number
- YY is the incremental hotfix number applied to that major release (if needed)

**Examples.** STA 26.5 is the fifth major release of the Navigate360 Staff platform in 2026. STA 26.5.1 would be a hotfix applied to STA 26.5 prior to the release of STA 26.6.

## New Features & Enhancements

### NavAI

Streamlined the disclaimer message that begins all conversations in AI Student Profile Agent, Course Planning Agent, AI Assistant for Students, and AI Chat Agent. The new message reads "Hi! I'm an AI assistant, not a live agent. By continuing, you consent to share your chat info with us and authorized third parties per our [Privacy Policy](#) and [Terms of Use](#)."

Before:



By initiating this chat, you consent to the use of this chatbot application provided by EAB, our third-party service provider and OpenAI, their third-party service provider. EAB and Roxbury Community College will record and maintain a transcript of this chat. For further information about our information practices, please see our Privacy Policy → [here](#)

Ask me a question

After:

Student Profile Agent

Student Profile Agent



Hi! I'm an AI assistant, not a live agent. By continuing, you consent to share your chat info with us and authorized third parties per our → [Privacy Policy](#) and → [Terms of Use](#).

Ask me a question

## Reports

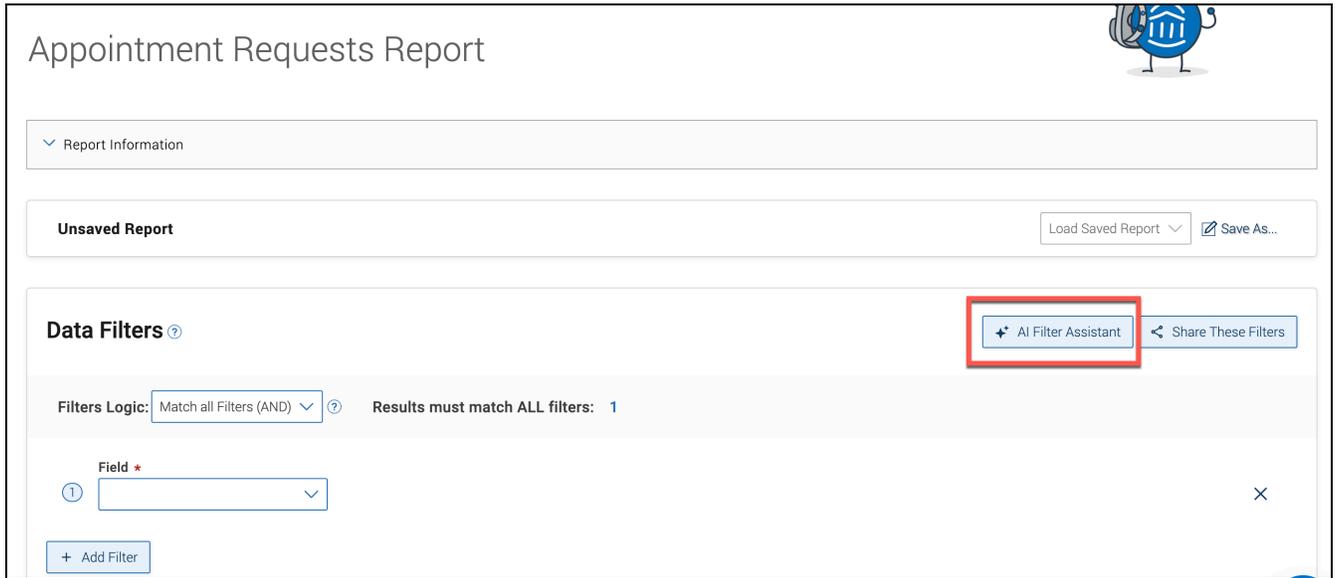
### Legacy V2 Reports Deprecation

All V2 reports are sunset and removed from all users' views with the STA 26.1 release. Any saved V2 report will no longer be accessible to users. Scheduled V2 reports will no longer run. Warning and references to V2 reports have also been removed, as have links to Saved V2 Reports.

## Filter Assistant Location Change

The AI Filter Assistant for Navigate360 Reports has been moved and opened by default to make it easier for users to find and use.

Before:



Appointment Requests Report

Report Information

Unsaved Report Load Saved Report Save As...

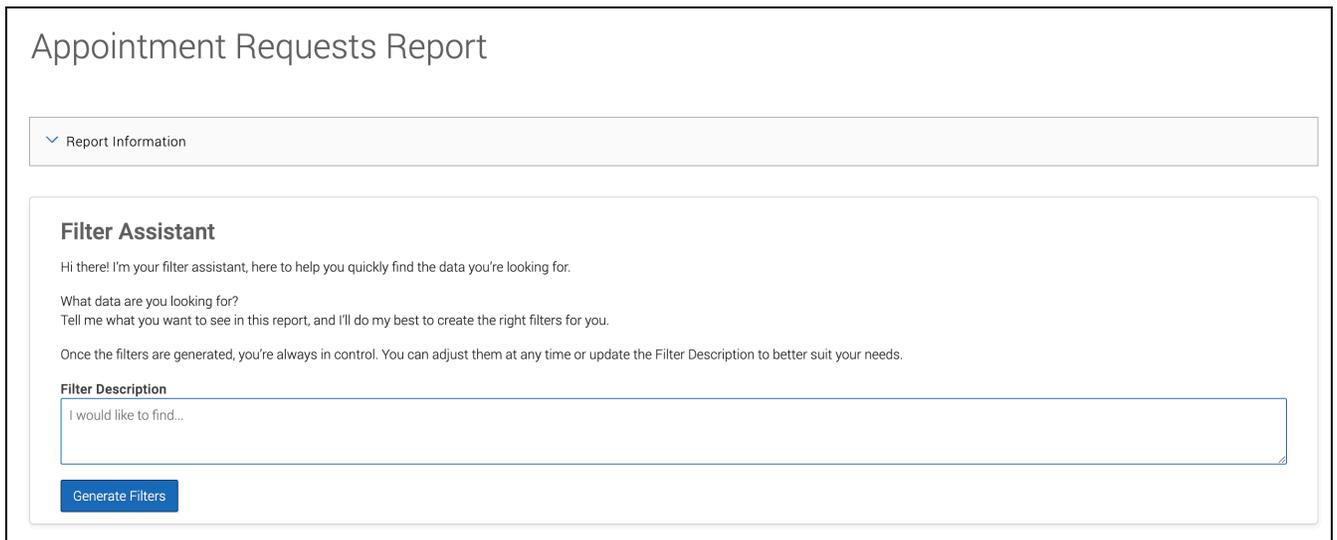
**Data Filters** + AI Filter Assistant ← Share These Filters

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

Field \*  ×

+ Add Filter

After:



Appointment Requests Report

Report Information

**Filter Assistant**

Hi there! I'm your filter assistant, here to help you quickly find the data you're looking for.

What data are you looking for?  
Tell me what you want to see in this report, and I'll do my best to create the right filters for you.

Once the filters are generated, you're always in control. You can adjust them at any time or update the Filter Description to better suit your needs.

**Filter Description**

Generate Filters

**Important.** By default, all users will have the *Allow Staff to Create, Edit, and Update Status of Tasks for Self* permission turned on.

Navigate360 now includes a feature that allows staff users to create Tasks for themselves or other staff users that are tied to students, prospects, and/or contacts. This release note covers staff tasks created for staff users connected to *students* in Student Success.

To access Staff Tasks, users need the *Allow Staff to Create, Edit, and Update Status of Tasks for Self* permission. Other permissions allow users to create tasks for other staff users, edit tasks assigned to them by others, and/or view tasks for others.

**Staff Tasks**

- Allow Staff to Create, Edit, and Update Status of Tasks for Self
  - Allow Staff to Edit Tasks Assigned to Self By Others
  - Allow Staff to View Tasks for Others
    - Allow Staff to Create, Edit, and Update Status of Tasks for Others (Created by Self or Others)

Existing To-Dos (previously called *Staff To-Dos*) are collected on the **To-Dos and Tasks** page, previously the **To-Dos** page, under the *My Student To-Dos* tab. Staff Tasks can be created in the *Staff Tasks* tab.

### My Student To-Dos & Staff Tasks

**My Student To-Dos** | Staff Tasks

#### Upcoming And Overdue To-Dos

Search in Results

You have no upcoming or outstanding To-Dos.

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There is also a Staff Tasks tab on the Student Profile, where you can create a task related to the specific student.

### Staff Tasks Related To Andy

[+ Add Task](#)

		TITLE	ASSIGNED TO	DUE DATE	STATUS
<input type="checkbox"/>	≡	Review students on Student List an...	22, Support	01/15/2026	Open

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K < > >>

[Open Student Profile Agent](#)

[Message Student](#)

[Add a Note on this Student](#)

[Add a Journey to this Student](#)

[Add a To-Do to this Student](#)

[Report on Appointment](#)

[Create Request for Appointment](#)

[Schedule an Appointment](#)

[Add to Student List](#)

[Issue an Alerts](#)

[New System Capture Email](#)

[Edit User Settings](#)

[Upload Profile Picture](#)

[Impersonate User](#)

Opening the **Staff Tasks** tab on the To-Dos and Tasks page displays two tables: **My Tasks** and **Other Staff Tasks**. Depending on the user's permissions, the user may also view the **Add Task For Me** and **Add Task For Others** buttons for action.

### My Student To-Dos & Staff Tasks

My Student To-Dos

Staff Tasks

#### My Tasks

[+ Add Task For Me](#)

No Data

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#### Other Staff Tasks

[+ Add Task For Others](#)

No Data

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**Add Staff Task** ✕

**Title \***

**Description**

**Related Person Type**

**Related Person**

**Due Date**

**Priority**

**Assigned To \***

**Email Reminders** ⓘ

**SMS Reminders** ⓘ



The two required fields are *Title* and *Assigned To*. Staff users can also add a description of the task, a due date, the task's priority, and when Email and SMS Reminders are sent to the user (if at all).

One optional field allows a staff user to add a Related Person to the task. For Student Success users, this will be a student.

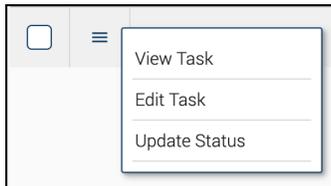
**Related Person Type**

**Related Person**

Once you have added a task for yourself, it appears in the table.

<input type="checkbox"/>	☰	TITLE	RELATED PERSON TYPE	RELATED PERSON	DUE DATE	STATUS	PRIORITY	CREATED BY
<input type="checkbox"/>	☰	Make a student list	Student			Open		22, Support

From this table, you can update the task's status, view details, or edit the task.



Finally, you can bulk update your tasks or tasks you have made for others. This is helpful for staff users who can assign tasks to other staff users in particular, as you can bulk update assignments and task status with this action.

### Bulk Update Tasks ×

1 Task selected. All selected Tasks will reflect the new selected Assignee, Status, and Notes.  
If you add notes, they will overwrite any that currently exist.

**Assigned To \***

**Status \***

**Assignee Notes**

**Assigner Notes**

## Staff Tasks Report

**Report Results**

Search in Results ☰

<input type="checkbox"/>	☰	TITLE	RECORD SOURCE	RELATED PERSON TYPE	RELATED PERSON	RELATED PERSON EMAIL	OPPORTUNITY NAME	DESCRIPTION
<input type="checkbox"/>	☰	Sending TASK after unmas...	Advancement Success	Contact	<a href="#">Winnie Script</a>	winese@eab.com		Sending TAS
<input type="checkbox"/>	☰	TASK Reminder NOTIF che...	Advancement Success	Contact	<a href="#">Emily Kane</a>	emily.kane@example.com		TASK Remini
<input type="checkbox"/>	☰	CHECKING AS TASK email ...	Advancement Success	Contact	<a href="#">Deep Blue</a>	deepblue@gmail.com		CHECKING A
<input type="checkbox"/>	☰	CHECKING RS TASK email ...	Recruitment Success	Prospect	<a href="#">Oluwaseyi Adekunle</a>	2@eab.com10		CHECKING R
<input type="checkbox"/>	☰	CHECKING RS TASK Assig...	Recruitment Success	Prospect	<a href="#">Cameron Blackmon</a>	bdfs434t2@eab.com		CHECKING R
<input type="checkbox"/>	☰	CHECKING AS TASK Assia...	Advancement Success	Contact	<a href="#">Kal Debone</a>	kdeboer@al.com		CHECKING A

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## Appointment Center

### Select a Prospect Linked to a Student Record

Users can now select a Prospect record that is linked to a Student record when scheduling and managing appointments.

This selection is available from multiple appointment workflows, including the student selection page in the Appointment Center, the **Add an attendee** section when scheduling an appointment, and the **Manage Appointment** dialog in the calendar.

## Fixed

- Fixed an issue where student ids being exported from the Enrollment Campaign page were wrong.
- Fixed merge field issues partners were noticing in messages sent from Navigate360.
- Fixed an issue where survey names could not be searched in the Surveys Report in Navigate360's staff platform when the Survey creation date differed from the publishing date.



Was this article helpful?

Have more questions? Post in the comments below.

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## Comments

8 comments

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[Help Center Manager](#)

1 month ago



0

**8 Jan 2026:** Added a note explaining the permission enabling Staff Tasks is on for all User Roles by default.



[Help Center Manager](#)

1 month ago



0

**8 Jan 2026:** The change to the Report Finder will not happen until STA 26.2, so this information has been moved.



Awesome new features. Staff Tasks will be a game changer, and something I'm excited to use!



That said, how is it that we have AI integration before we have the ability for students to sync their external calendars? lol



**May Cheng**

1 month ago



0

According to the general availability dates, the staff tasks should be available but I don't see any of those updates either in permissions or on profile pages.



**Taylor Johnson** EAB Partner Support Team

1 month ago



1

Hi [May Cheng](#),



Thank you for reaching out! Right now, these updates are still in the process of rolling out. If you're not seeing the Staff Task updates yet (either in permissions or on profile pages), please check back on the 21st. By that point, the release is expected to be fully available across sites.



Best,

Taylor (Partner Support Team)



**May Cheng**

1 month ago



0

Thanks [Taylor Johnson](#)! I was going off the dates in the email blast, but it must have changed. My apologies for not double checking!



Hi EAB, absolutely loving the staff tasks feature. What plans do you have to expand the "Related Person Type" dropdown menu to staff and faculty?



For a use case, my institution (as well as many others I'm sure) requires staff and faculty users to read and agree to certain policies (e.g. FERPA) or complete a training before we give advanced permissions in Navigate. I want to begin using staff tasks to assign these policy reviews. However it's a little clunky assigning something to staff and faculty when the only "Related Person Type" allowed to us right now is the Student type.



**Taylor Johnson** EAB Partner Support Team

25 days ago



Hi [Katina Velentzas](#),

Thank you for reaching out! I have converted your comment into a ticket. A member of our Partner Support Team will assist you further on that ticket.



Best,

Taylor Johnson

