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Navigate360 Staff Platform: STA 26.4 Release Notes



Help Center Manager

8 hours ago · Updated

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Parts of Navigate360 Impacted: Navigate360 for Student Success

Training Earliest Availability: 13 February 2026

Prod Release Dates: 17 Feb 2026 (Prod A) / 19 Feb 2026 (Prod B)

General Availability Dates (Tentative): 18 Feb 2026 (Prod A) / 20 Feb 2026 (Prod B)

Release Note Summary: New Meeting Summary Assistant, small improvements, and various fixes in the platform.

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New Features & Enhancements

AI Chat Agent

AI Chat Agent Immediate Open Code

Partners can now customize the JavaScript snippet for the AI Chat Agent so that it immediately opens when the page loads by passing `open_mode: 'immediate'`. This information is in the instructions on the page, as highlighted below.

View Javascript Snippet ×

Copy the JavaScript snippet and add it to your site to see the AI Chat Agent. To customize the button color, replace the hex value of `button_color` with your preferred color. You can also control where the button appears by passing `button_position: 'bottom-right'` or `button_position: 'bottom-left'`. If no position is specified, the button defaults to the bottom right. If you would like the AI Chat Agent chat window to default to open when the page loads, you can pass `open_mode: 'immediate'`. If `open_mode` is not specified, the AI Chat Agent will only open when the toggle button is clicked.

```

1 <script type="module" data-eab-app="kbi">
2 import portal from 'https://cdn.eab.com/portal/1.1.0/index.js';
3
4 const frame = portal.startup({
5   host:
6   render_to: '[data-eab-app="kbi"]',
7   remote_view: 'run_plan',
8   environment: 'run_plan_qa',
9   settings: {
10    token:
11    partner_name:
12    environment: 'qa',
13    button_color: '#00355F'
14  }
15 });
16 </script>
```

Meeting Summary Assistant

Introducing Meeting Summary Assistant

Navigate360 for Student Success introduces our Meeting Summary Assistant. The AI-powered Meeting Summary Assistant allows the user to transcribe and summarize audio from a meeting, summarize attachments, or summarize text to put in your Appointment Summary Report or Notes.

Release Timing Note: Meeting Summary Assistant is available in all Training sites as of February 18 and all production sites as of February 23.

Important. No audio is recorded or stored by Navigate360 or our third-party transcription service. The Meeting Summary Assistant uses live transcription that generates a transcript that is temporarily available on the Appointment Summary Report. Navigate360 also does not store your transcription after the Appointment Summary Report is saved or closed and neither does our third party transcription service.

APPOINTMENT REPORT FOR GARRY CAGLEY

Appointment Details

Career Counseling
01/27/2026 1:00pm - 1:10pm UTC

Care Unit
Advising

Location
North Campus 3

Service
CAREER COUNSELING X
Select Service

Course
Start typing to search all courses

Meeting Type
IN-PERSON X
Select Meeting Type

Date of visit
01/27/2026

Meeting Start Time
1:00pm to Meeting End Time
1:10pm

All times listed are in UTC.

Attendees

Grace Charles (she/her)
2021001234
Advisor
 Attended

Garry Cagley - 362228553
Sophomore
 Attended

Checkin _____ to Checkout _____

Suggested Followup

This will be saved on the report as a suggestion. No appointment will be created.

Date _____ Time _____

Summary Details For Garry Cagley

Assignments Discussed
We discussed next steps on Thesis paper submission. Importance of writing precise

Objectives of the Session
The appointment stayed focus on prepare for thesis dissertation and guidelines to

Study Skills Used
Communication Skills; Presentation skills; Effective writing

Student arrived on time and was ready to begin our session. Yes No N/A

Student was prepared (attended class, read lesson, had notes, etc.)? Yes No N/A

Student asked for explanation of material not understood? Yes No N/A

Student responded positively to instruction (as you suggested)? Yes No N/A

Appointment Summary

Meeting Summary Assistant

Choose how you'd like to create your summary:

Transcribe & Summarize Audio
Transcribe audio and generate AI summary

Summarize Attachments
Upload file for AI summary

Summarize Text
Use text for AI summary

Paragraph **B** *I*

1. We discussed next steps on Thesis paper submission.
2. Importance of writing precise goals , sample space and results identified
3. The appointment stayed focus on prepare for thesis dissertation
4. Also, guidelines to defend a successful thesis
5. Communication Skills; Presentation skills; Effective writing

Attachments

Attach File
Choose File No file chosen

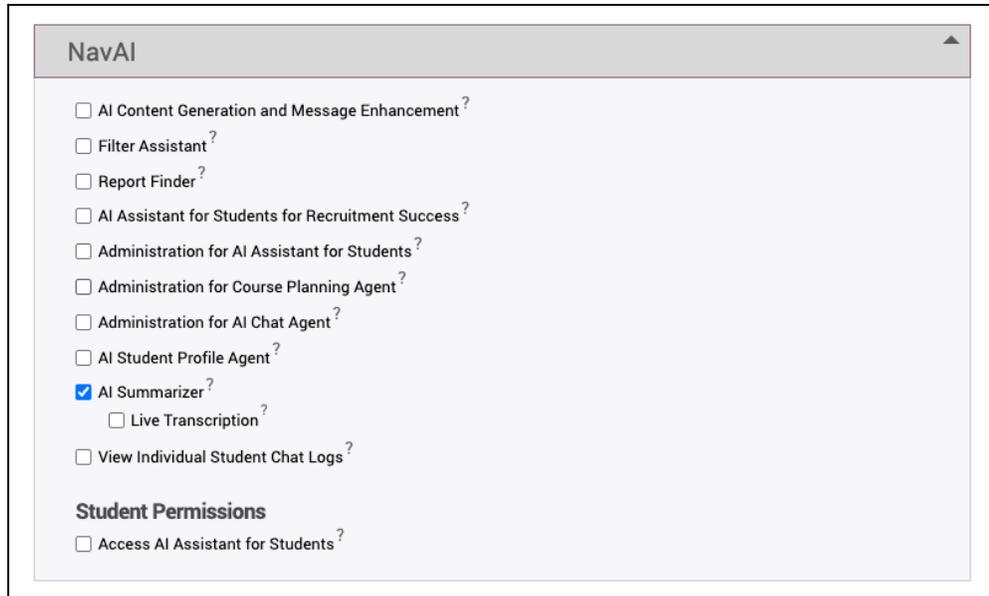
Privacy

Student(s) can see this report.

Report Information

Created By: Grace Charles (she/her) on 01/28/2026 7:00am UTC

For Meeting Summary Assistant, there are two permissions. *AI Summarizer* gives users access to the tool; *Live Transcription* allows the user to have access to audio transcription while using it.



NavAI

- AI Content Generation and Message Enhancement?
- Filter Assistant?
- Report Finder?
- AI Assistant for Students for Recruitment Success?
- Administration for AI Assistant for Students?
- Administration for Course Planning Agent?
- Administration for AI Chat Agent?
- AI Student Profile Agent?
- AI Summarizer?
 - Live Transcription?
- View Individual Student Chat Logs?

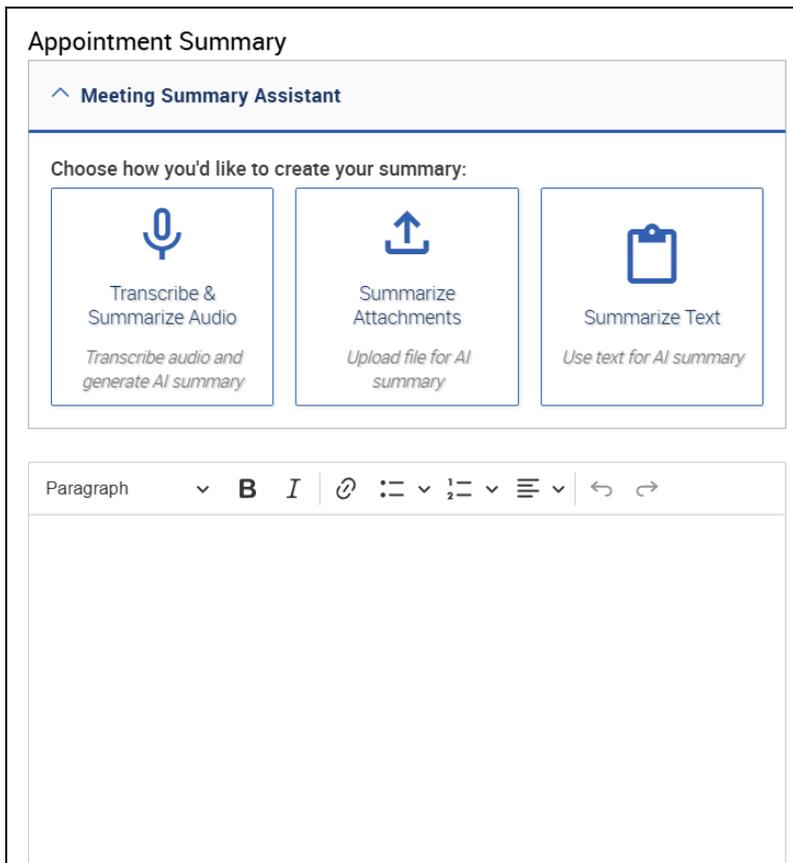
Student Permissions

- Access AI Assistant for Students?

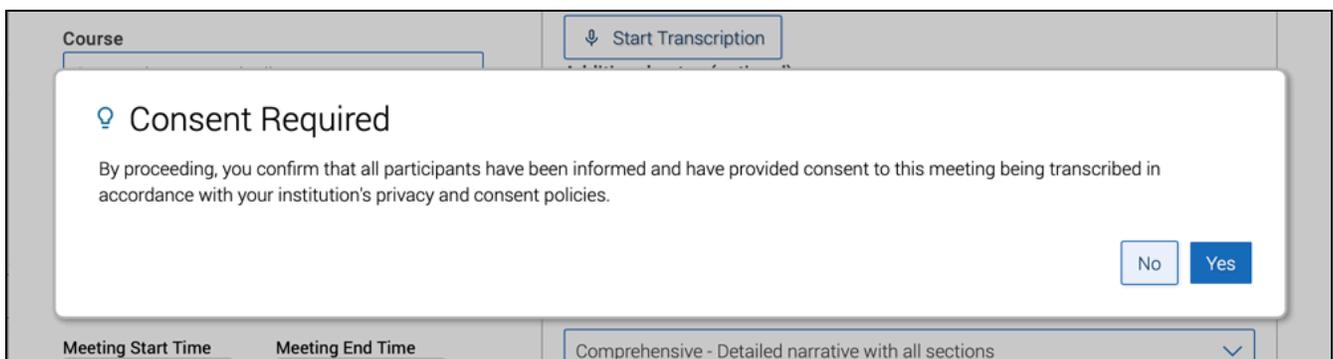
There are three ways to add content to the Meeting Summary Assistant: audio transcription and summarization, attachment summaries, or text summary. The user selects one to start creating a summary for the appointment and content is updated in the summary text box field on the Appointment Summary Report or Note. The user can use more than one option, which is added to the existing summary. For example, the staff member can create an audio transcript, upload a document, and add the summary to the transcript. Staff can also edit the summary before saving the Note/Appointment Summary.

Important. Audio transcription is turned on by default for your institution, but users must be given the role permission to use it. EAB can also disable the audio transcription feature for your entire institution. To do so, contact Navigate360TechSupport@eab.com and request this.

To transcribe live audio, users select **Start Transcription** from the available options.



Once the *Transcribe & Summarize Audio* option is chosen, the user needs to provide consent for recording before proceeding by reading the warning and selecting **Yes**.



The live audio transcription then begins. This transcript can be paused and restarted during the conversation. Note that the staff user will also see the transcript "live" as the conversation occurs. If there are multiple individuals in the meeting, it's recommended that speakers identify themselves in the beginning of the conversation for optimal live transcription. Transcription is also supported for one speaker if, for example, a staff would like to dictate appointment notes following an interaction.

Course

Meeting Type

Date of visit

Meeting Start Time **to**

Meeting End Time

All times listed are in UTC.

Attendees



Support 24
Administration, Super User

 Attended



Rich Shih - 69569332

 Attended

Checkin **to** **Checkout**

Appointment Summary

Meeting Summary Assistant

[Back to Options](#)

Live Audio Transcript

 Pause Transcription (00:27)

...1: Good morning. This is a live transcription. Of the meeting summary assistant

Additional notes (optional)

Add any additional context or notes to include with the transcript...

Meeting Assistant uses AI to generate summaries, action items, and insights from your meeting content. The outputs are provided for informational purposes only and should be reviewed before use.

Summary Style

Comprehensive - Detailed narrative with all sections

 Summarize

After the conversation is finished, the transcription is stopped. The staff user can then select one of four Summary Styles (or a custom style) and select **Summarize**. Users can also add additional notes or context that may not have been discussed in the live transcriptions that will be included in the summarization.

Important. The appointment summary cannot be closed, minimized, or saved until the audio transcription is stopped.

In the next example, we show summarizing text. Users might use this to paste in notes taken separately.

Meeting Summary Assistant

[Back to Options](#)

Enter or paste your meeting notes

Type or paste meeting notes here...

By initiating this action, you consent to the use of this application provided by EAB, our third-party service provider and OpenAI, their third-party service provider. EAB and Whitehurst University will record and maintain a transcript of this interaction. For further information about our information practices, please see our Privacy Policy here. AI systems are not perfect and may make mistakes. Please review the message carefully. You are responsible for the messages you send.

Summary Style

Comprehensive - Detailed narrative with all sections

 Summarize

There are five options for the Summary Style, as displayed below. Custom Summarization Instructions allows the staff user to create their own summary style and apply it to the text, transcript, or upload.

Additional notes (optional)

Add any additional context or notes to include with the transcript...

Meeting Assistant uses AI to generate summaries, action items, and insights from your meeting content. The outputs are provided for informational purposes only and should be reviewed before use.

Summary Style

- Comprehensive - Detailed narrative with all sections
- Comprehensive - Detailed narrative with all sections**
- Concise - Brief overview in paragraph format
- Key Points - Essential information by topic
- Bulleted - Structured sections with action items
- Custom Summarization Instructions

Users can also upload attachments and add text and then selecting a Summary Style, then select **Summarize** to create an automatic summary, as shown in the example of summarizing an attachment below. This can help extract information from an attachment to add to Appointment Summary Report notes, or can process an uploaded transcript file from a virtual meeting platform like Zoom. Supported file types are txt, docx, pdf, md with a max size of 1.0 MB.

Appointment Summary

Meeting Summary Assistant

Back to Options

Upload Notes

Drop your files or [Browse](#)

1.0 MB Max Size

Advanced Search User Guide.pdf

By initiating this action, you consent to the use of this application provided by EAB, our third-party service provider and OpenAI, their third-party service provider. EAB and Whitehurst University will record and maintain a transcript of this interaction. For further information about our information practices, please see our Privacy Policy here. AI systems are not perfect and may make mistakes. Please review the message carefully. You are responsible for the messages you send.

Summary Style

Comprehensive - Detailed narrative with all sections

Summarize

Paragraph

B *I* | | | | |

The document is an Advanced Search User Guide from Navigate360 within EAB's Navigate360 platform, focusing on building and using complex search queries to identify specific student groups. It is structured as a practical, how-to guide for advisors and staff, detailing categories of filters, example use cases, and the expected outcomes of various search configurations. The content also includes a legal caveat and organizational information about EAB.

Key sections and themes

1) Purpose and scope

- The guide provides a collection of frequently used searches and step-by-step instructions for creating these searches.
- It describes when each search is helpful, the parameters involved, and the results that can be expected.
- For questions not covered by the guide, it directs users to contact the Partner Support Team.

2) Navigation and content organization

Note that if a staff member uses more than one of Meeting Summary Assistant's options, e.g. transcribing audio and then uploading a document, these will both be added to the summary. The document summary will not overwrite the transcript and vice versa.

Finally, staff users can review and edit the output of Meeting Summary Assistant before saving and filing the Appointment Summary report as they would before. It is recommended that staff always review summary text created before saving.

Progress Reports

Adding Instructor Comments to At-Risk Emails

If configured, the instructor's comments can now be included in the At Risk emails and Alert emails sent when a Progress Report is submitted about them. This allows students to more easily access

progress report comments from their instructors without needing to login to view the progress report at institutions that make this information visible to students.

You have been marked at risk.

You have received this email because of a professor evaluation in one of the classes you are enrolled in this term.

Class

GAI001 - 01X - Generative AI

Current Absences in this Class

2

Evaluated By

Pilar Dominguez on 02/10/2026 6:34pm IT

Additional Comments

does well on most assignments which are turned in; missed midterm exam and additional attempt to take it; can pull grade up if all remaining assignment are completed

Special Instructions from Navigate Demo Configurations

There are two required configurations to enable this feature. One is the Show Comments Column checkbox in Global Configuration to show this field on the Progress Report form.

Show Comments Column

Comments Verbiage:

Comments

The other is the Show Progress Report Comments to Students in Student Alert and At Risk Emails permission for the Student role on the Edit Role page. This is a new role permission that is OFF by default.

Institutions may allow students to view comments on just the progress report record, on just the at risk or alert email, or both.

Student Permissions

Allow Students to View Comments on Progress Reports Submitted About Them

Show Progress Report Comments to Students in Student Alert and At Risk Emails

Student Profile Documents

Document Exports for Student Success

You can now export files attached to appointment summaries and other records without downloading them one by one. Schedule recurring exports of documents, including appointment summaries, notes, applications, and feedback, to easily integrate them with your SIS or other systems. App admins will need to contact Partner Support at Navigate360TechSupport@eab.com to gain access to this feature.

The following document exports are available:

- student_note_documents/
- student_appointment_summary_documents/
- student_pre_appointment_response_documents/
- student_appointment_feedback_response_documents/

To learn more, refer to [Document Exports Overview](#), which has an Enrollment/Advancement Success focus but explains the process.

Text Messaging

In order to support partners' communication needs, we have increased the number of recipients who can be sent an SMS text message that supports a reply.

Now, when a bulk text message is being created that has under 1000 recipients, users will now see an option to send the text message from a number that supports replies.

Send a Message ×

Email Text

To: 757 recipients

Send text message from a number that allows replies
 Send text message from a number that does not allow replies

▼ Apply a Template ⓘ

||

Message * ⓘ

0 / 300

Messages sent to 1000 or more recipients will always be sent from a number that does not allow replies in order to avoid text message spam blockers from preventing message delivery.

Fixed

Various Fixes

- Fixed an issue where the Appointment Center was not respecting Care Unit access permissions.
- Fixed an issue where, in some cases, minor data was not importing correctly and was causing a number of errors on students.
- Fixed an issue where users whose institution only has Student Success were having trouble creating custom widgets for My Dashboard. This has been resolved and users should be able to create widgets.
- Fixed an issue where users were unable to remove students from lists when taking action from the Staff Dashboard.
- For some Windows users, there was an issue where the Message Student box would not scroll, preventing users from sending messages. This has been fixed.

- Improved performance of the Assigned To field in Staff Tasks so that searching for a staff member is easier.
- Fixed an issue where in some cases, Application Details could not be entered by the student and were not being captured by the Navigate360 for Enrollment Success system.
- Fixed an issue where Staff Task email reminders were not being sent to Outlook.

 5

Was this article helpful?

Yes

No

0 out of 0 found this helpful

Have more questions? Post in the comments below.

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Comments

5 comments

Sort by 



[Meghan Peterson](#)

6 days ago



0

Does including instructor comments only apply to alerts issued through a Progress Report Campaign, or can we also enable comments to be included in the email messages for ad hoc/individual alerts and individual progress reports as well?





Erin Doyle Lastowka EAB Partner Support Team

6 days ago



0



Thanks for the question [Meghan Peterson](#)! The ability for students to see instructor comments in the email only applies to comments on a progress report, but would cover both progress reports submitted through a campaign and ad hoc progress report submissions. Ad hoc alert comments cannot show in the alert email to students. If you have more questions, feel free to reach out to us and we can help!

Navigate360TechSupport@eab.com



Erin Doyle Lastowka EAB Partner Support Team

4 days ago



0



19 Feb 2026: Added a note about two way SMS text messaging support for up to 1000 recipients.



Kelsey Richardson Blackwell

3 days ago



0



[Erin Doyle Lastowka](#)

When you turn on the comments, it says in "student alert" emails. Does that refer to the alerts submitted through the progress report process?

just the alert or alert email, or both.

Student Permissions

- Allow Students to View Comments on Progress Reports Submitted About Them
- Show Progress Report Comments to Students in Student Alert and At Risk Emails



Erin Doyle Lastowka EAB Partner Support Team

2 days ago



0



[Kelsey Richardson Blackwell](#) - Yes, this refers to the email configured on the Alert Reason and applies only to the comments that instructors submit on their progress report. If this

configuration is enabled and if an instructor selects an alert reason that sends an email to the student then comments on the progress report form (either from a campaign or an ad hoc progress report) appear in that configured alert reason email. Comments on ad hoc alerts (the ones that are independent of progress reports) cannot be sent to students currently.

