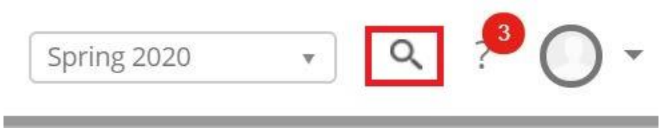
EAB Navigate – Advisor Platform
History Tab
April 2020

Reviewing the History Tab:

A student's history of appointments, notes, alerts and more can be accessed directly from a student profile. You can visit an individual student profile by either (1) clicking an advisee name on the Staff Home page or (2) using the Quick Search feature, accessed by clicking the magnifying glass in the top right corner of each page:

NOTE: People will the Professor role only are not able to search on students beyond those who are in their classes. Advisors and Administrators can use the Quick Search to find any student.



After opening a student profile, select "History."

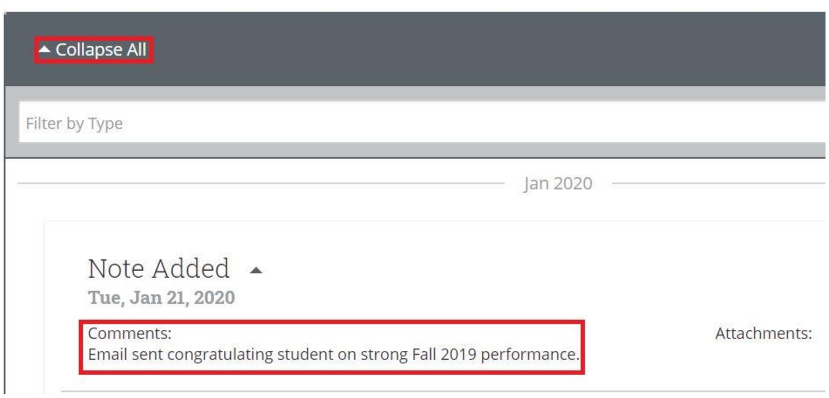
Your personal reminders about a particular student are displayed at the top of the History tab. You can use the triangle to find the option to delete reminders, which can be established by selecting "Add a Reminder on this Student" under the current alerts menu on a student profile. <u>Note that unlike other aspects of a student profile, reminders are associated with your record and viewable only by you.</u>

Below Reminders is the Student History. Selecting the triangle next to "History" allows you to see which types of entries are viewable:

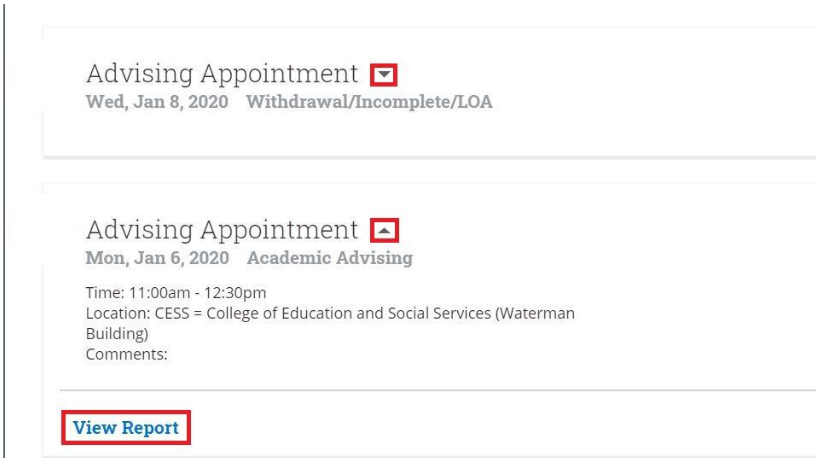
Selecting any options displayed in this menu, such as "Cases for," will filter out all other entries from the student's history. (Note: You will see different options for filtering items within the History menu depending on your role level permissions.) Select the triangle again to hide the filter menu.

You may also customize the level of detail visible for each entry in this view, using the "Expand All" option.

The image below shows an example of expanded detail for Notes:



To view notes and information entered in advising appointment summaries, click the "View Report" icon:



For more information about what types of details should be recorded in summary reports, see the "Advising Summary Reports – Best Practice Recommendations" on the [Navigate for Advisors website](#).