

Navigate360 FAQ: AI Capabilities*

**Please note: Any changes to the below information will be in compliance with applicable privacy laws and our partner agreements. From EAB's perspective, the use of AI within Navigate360 does not constitute automated decision-making under current privacy laws.*

General Questions

How does EAB leverage AI?

EAB leverages AI in multiple different ways. AI and supervised Machine Learning have been part of the Navigate360 support-level scoring process since 2015 (in support of Navigate360's Predictive Model).

With the public availability of Generative AI technologies, EAB has launched a suite of agentic AI assistants for staff and an agentic AI navigator for students and website visitors.

What is Generative AI?

In its simplest form, Generative AI refers to AI systems designed to generate new and original content, such as text based on learned patterns from data.

What is an AI Agent?

An AI agent is a system designed to autonomously perform tasks, make decisions, and interact with users based on real-time data. This represents the next evolution of AI because, unlike simple chatbots, they can adapt and act without constant human input.

How does this relate to ChatGPT?

ChatGPT is an application produced by OpenAI which also interacts with LLMs through text-based APIs. OpenAI is the vendor that produces LLM models (is also the application that delivers access to the public ChatGPT tool). EAB is not leveraging ChatGPT to power our services. However, we interact with the latest OpenAI GPT models available once they have been tested and reviewed according to our performance and safety standards.

What data does EAB collect?

EAB is not collecting any new or different data to provide our Navigate360 AI module. We do not use partner data to train Large Language Models (LLMs).

How is the data processed through the AI technology?

As users interact with Navigate360 AI features, data is processed by the LLMs we leverage by sending text to an API and receiving text back from the API. These are stateless transactions, and any trace partner data is only retained for a short amount of time for logging and compliance reasons before being destroyed.

Data sent to our LLM API providers is not used for any purpose other than to provide the Navigate360 AI service.

What companies process EAB partners' student data for Navigate360 AI features?

Amazon Web Services (AWS) and OpenAI process our partners' student data for Navigate360 AI features.

Is my institutional/student data safe? How can EAB ensure our data's safety?

Yes. AWS and OpenAI have enterprise-grade privacy and security standards and have passed industry certifications like SOC 2 and EAB's internal information security reviews. These providers are legally obligated to handle all of our traffic in a secure manner that allows them to process PII and any other data on our behalf.

Does EAB or AI LLM use partner data to train their own models?

No. EAB does not train our own model in order to provide our AI technology. We use Retrieval Augmented Generation, also known as RAG.

EAB has an enterprise agreement and data processing addendum with OpenAI which protects any student data transmitted to them. They are not allowed to do anything with the data other than provide their service. No model training is allowed.

Do we have any control over which data is used with the AI?

Navigate360 partners have complete control over which data is used with the AI. Partners have access to a configuration (from the Administration page) that allows them to control what data Navigate360 shares with OpenAI through the Knowledge Agent. These configurations will limit what personal identifiable information (PII) is sent to and processed by OpenAI.

Any partner documents or website URLs leveraged by the Knowledge Agent technology are completely controlled by the partner (e.g., school calendar, student handbook, etc.).

What AI agents are available with Navigate360?

Navigate360 is the only CRM with student-centric AI—AI that is intentionally designed and embedded to improve daily life for your staff and outcomes for your students.

Navigate360 includes an AI Assistant for staff that includes a suite of AI agents. As we are rapidly investing in our AI strategy, the following list is subject to change, but agents may include:

- Content Creation Agent: Instantly generate and personalize outreach to prospective or current students.
- Student Insights Agent: Understand holistic student performance with one click.
- Report Agent: Find and create robust data reports instantly.
- Course Planning Agent: Generate best-fit course plans for students.
- Task Agent (*planned functionality*): Conquer your to-do list by prompting actions like alerts, notes, and more.
- Staff Knowledge Agent (*planned functionality*): Quickly access your activity history, resources, and templates.
- Campaign Agent (*planned functionality*): Launch smart enrollment and advising campaigns in a fraction of the time.

Navigate360 also has an AI Navigator for students that is made up of several agents:

- Student and Prospect Knowledge Agent: Provide instant responses to student questions in 90+ languages, as early as recruitment and orientation. This functionality can be accessed through the Navigate360 interface.
- Web Embed Agent: Partners can choose to embed the Knowledge Agent functionality on any school website to support any website visitors. For instance, partners may choose to have bots support the enrollment website, financial aid, website, career services, etc.
- Course Planning Agent: Give students the ability to generate course plans and access 24/7 course planning guidance.

Will the institution be able to decide to turn the agents on/off and when?

Yes. Agents may all be enabled or disabled at the discretion of the partner institution.

FAQ for the Navigate360 AI Navigator

Where do students access the AI Navigator?

Students and prospects can interact with the Knowledge Agent and Course Planning Agent directly within the Navigate360 interface (mobile and desktop).

The Web Embed Agent is accessible via any website the institution chooses to embed it.

Each agent has different knowledge bases which partners control – this determines which data is available from each agent.

Is the AI Navigator available via mobile and desktop?

Yes. The Knowledge Agent can be accessed through the Navigate360 mobile app and the student's Navigate360 desktop interface.

The web embed agent is also accessible on any website that a partner chooses to embed them.

How do the Knowledge and Web Agents generate answers?

Answers are directly powered by documents and website URLs which the partner adds to the agent configuration page. This information may include resources about the campus, departments, courses, events, policies, and other relevant aspects of student life. These documents and URLs are stored in a database and will be accessed when students interact with the bot to answer the student's questions. Any updates to the materials are reflected in real time. Each agent has different knowledge bases which partners control – this determines which data is available from each agent.

Where do these answers come from?

The Knowledge and Web Agents generate answers based upon facts in the documents and URLs that partners upload to Navigate360 AI through the staff interface. The bots focus responses to the facts contained within these documents and URLs.

Bots will source the document (and accompanying URL, if provided) when providing a response.

How often does the data referenced by the Web and Knowledge Agents get updated?

Data used by the AI can be managed (created, updated, and deleted) directly by the application administrator at the institution.

Will the Web Agent enable authentication into Navigate360 or other tools?

We are planning to have ways for the embeddable agent to identify a student that is interacting with the bot, but this is likely not through authentication. At this time agents cannot authenticate the student into Navigate360 or other tools directly, though it will send students to the logins for these tools as needed. Final functionality to meet this use case is still TBD.

Will the Web and Knowledge Agents provide leads into the Recruitment Success module?

Yes, lead capture is planned for the Web and Knowledge Agents. This item is planned for our FY26 roadmap.

Will the Web and Knowledge Agents always provide correct answers?

Due to the nature of Generative AI built on Large Language Models (LLMs), we cannot guarantee that the bot will never provide unexpected results. However, the design of EAB's Knowledge Agent has a demonstrated high-efficacy track record for confining correct responses to specific data from documents uploaded into Navigate360 AI. We will continue working on enhancements as partners identify any areas of improvement. If the Knowledge Agent is indicating it does not know the answer to a specific question, it is likely that the answer to the question is not contained within the documents or URLs that have been uploaded into Navigate360 AI.

What happens if the Web and Knowledge Agents do not know the right answer?

The Navigate360 AI Navigator does its best to answer student questions. When an answer is not available or the topic is outside of what the tool can support, the Navigator will urge students to seek other, relevant resources, including their care team, to get their questions answered or needs met. For example, if a student asks about the status of their FAFSA application the Navigator will suggest reaching out to their financial aid advisor and/or checking the FAFSA website because it does not have direct access to the student's financial aid information. The school cannot configure these responses as they are generated based on student and conversation context.

Can I specify answers to specific questions that I want the Web and Knowledge Agents to give?

You can specify the facts that you would like the bot to formulate its answers from; however, we do not support the ability to provide an exact response to a specific question at this time.

How can I make sure the Web and Knowledge Agents generate the right answers before we make them available to students?

Staff assigned as Knowledge Agent Admins can add documents and URLs and preview the Knowledge Agent (accessible via the staff interface). Staff can use this preview mode to validate that responses are meeting expectations before the functionality is released to students. All students will get access once the feature is turned on.

I already have a chatbot on campus, how is this different or better?

The Navigate360 Web and Knowledge Agents are far superior to many legacy chatbots our partners have on campus. Because Navigate360 leverages Generative AI versus many other chatbot solutions, it will optimize how

you keep your content relevant for students. We know you have limited people resources, and with our agents there's no Q&A set-up for you to maintain and there's no training besides just feeding the bot the contents you want it to use, meaning your tech team can stand up our agents in a matter of hours, not weeks.

Will the Knowledge Agent be able to ingest the Q and A's we have already configured for our legacy chatbot?

Yes. The Knowledge Agent can leverage any existing form of documentation (depending on file type – see next question) which contains information students may have questions on.

What are the other types of resources that a school might use to power the Bot?

Our partners may choose to upload any existing form of documentation (depending on file type) which contains information students may have questions about.

Currently supported forms of documentation include Word documents, PDF, PowerPoint (not including PowerPoint notes), and .txt documents.

Partners may also leverage web scraping capabilities to feed the web and knowledge agents. Adding a Web Source allows partners to add URLs where they want the agent to collect data from. Users may only configure URL's from the .edu web page for their institution. Web source jobs will automatically re-run every two weeks, but can be manually re-run at any point. Users can monitor the status of the web source; once the status is marked as success, the content is instantly used by the agent to answer student or prospect questions.

FAQ for the Navigate360 AI Assistant

Where can I use the AI Content Creation Agent within Navigate360?

You will be able to use the AI Content Creation Agent in all areas of Navigate360 where you compose messages to students including campaign creation, templates, and ad-hoc student messages (both text and email). The tool will assist in creating both emails and SMS messages.

The AI Content Creation Agent is available in both the student success and recruitment focused Navigate360 offerings.

How does the AI Content Creation Agent work?

Users type in the goal of their message, for example "Please write an email reminding students that the enrollment deadline for Spring term is approaching (12/25) and encourage them to enroll now". After clicking the "Auto Enhance With AI" button, the message is re-written by AI with a more personal feel than can help prompt advisors to write more engaging content.

Users can choose a "tone" by which they want the message to read as well (e.g., direct, inclusive, etc.).

How does the AI Report Agent work?

Located within each report, the AI Report Agent can help a user configure appropriate filters and report criteria to build the report they are looking for.

Does the AI Report Agent use the permissions for data privacy we already have in place?

Yes. The AI Report Agent will only share report information with the users that have been granted access to that data through the Navigate360 Administration settings tool.

Can the AI Report Assistant suggest the report type and create charts based on the criteria given?

The Report Agent will suggest the report type, but will not be able to create charts directly. Creating charts is a feature within our reporting capabilities, but is not directly created via AI.