

V3 Reports



Help Center Manager

3 days ago Updated

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What: V3 Reports contain data and analytic insights related to student success programs. The V3 reports will produce the same results as our legacy [Reports](#), which are still available. The legacy Reports will be sunset at a later date.

Where: Access the Reports landing page by selecting the **Reports icon** on the left sidebar.

Who: Reporting is a helpful tool for **staff** tasked with pulling reports and analytics related to student success programs. This may be the institutional administrator, someone from the provost's office, IR, or another specialized staff member. That said, other staff may also have access to these reports depending on your institution's policies.

Conditions: Your institution must have access to reports tied to Strategic Care. Your role must be given access to the reports. Each report has an individual permission for access.

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Feature Overview

As a single source of consolidated data points, Navigate360 creates a unified analytics platform which links numerous campus stakeholders around student success challenges. We use best practice data insights so your college can make informed decisions around student intervention strategies, such as improving student interactions and maximizing faculty and staff workflow.

Our V3 reports have advanced filtering options and new grid styling and functionality. These V3 reports will product the same results as our previous reports, which are still accessible.



Reports

My Saved Reports | **Standard Reports** | My Report Automations

Standard Reports

Select a report type below to customize and run a new report. To save a report for future use, click save from the report results.

ⓘ You Are Currently Viewing the V3 Standard Reports

These reports have improved infrastructure, advanced filtering options, and new grid styling and functionality. These reports will produce the same results as our V2 reports. Should you need to access old V2 reports for any reason, click [here](#).

Reminder: The V2 reports will be deprecated on a later date, to be announced.

REPORT TYPE	CATEGORY
Appointment Feedback Metrics	Appointment Feedback
Appointment Feedback Responses	Appointment Feedback
Appointment Campaigns Report	Appointment/Visits Reports
Appointment Requests Report	Appointment/Visits Reports
Appointment Summaries Report	Appointment/Visits Reports
Appointments Report	Appointment/Visits Reports

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Report List and Descriptions

There are **25 reports** in Navigate360 V3 Reports: Appointment Feedback Metrics, Appointment Feedback Responses, Appointment Campaigns, Appointment Requests, Appointment Summaries, Appointments, Check-Ins, Alerts, Cases, Knowledge Bot Usage, Enrollment Census, Progress Report Campaigns, Progress Reports, Course Section Capacity, Survey Campaigns, Surveys, Academic Plan Utilization, Student Compliance to Advisor Plan, Availabilities, Attendance, Notes, Students Enrollments, Students Active for Term, and Study Hall.

Detailed information about each unique column in each report is in the Data Dictionary articles on the Help Center and the reports themselves. Information about the columns that appear in every report is in the Standard Fields article. Note that the unique columns should be the same as in the legacy reports.

Appointment Feedback Reports

Appointment Feedback Metrics Report

The Appointment Feedback Metrics report shows how many feedback requests are being sent by a template, how many responses the template has gotten, the response percentage, and information about the template itself.

Report Results

Search in Results

TEMPLATE NAME	TOTAL REQUESTS SENT	TOTAL RESPONSES	RESPONSE PERCENTAGE	CARE UNIT	LOCATION	STUDENT SERVICE	TEMPLATE CREATED AT
Transfer advising feedback	9	6	66.67	Advising	Advising and Transfer Center	Advising	05/08/2023 2:12 PM
Support Services	89	0		Advising			05/09/2023 10:33 AM
post appt tutoring	0	0		Advising			05/09/2023 1:44 PM
Accessibility feedback	246	189	77%	Advising	Accessibility Office	Advising	05/15/2023 3:17 PM
Math tutoring feedback	265	154	58%	Advising	Accessibility Office	Counseling	05/15/2023 3:17 PM
General feedback	0	0		Advising			05/15/2023 3:20 PM

1 - 14 of 14 100 K < 1 > >

To use this report, you need the View Appointment Feedback Metrics permission.

Appointment Feedback Responses Report

The Appointment Feedback Responses report shows the responses that the students give to the feedback forms. It shows each question in the form, the question type, and the answers.

Report Results

Search in Results View grid table

STUDENT NAME	APPOINTMENT DATE	START TIME	END TIME	APPOINTMENT ORGANIZER	QUESTION TYPE	QUESTIONS	ANSWERS
Abuaita, Ashwin	08/01/2023	11:45 PM	11:46 PM	Kilpatrick, Steven	Rating – Frequency	how often would you come ...	4 Often
Abuaita, Ashwin	08/01/2023	11:45 PM	11:46 PM	Kilpatrick, Steven	Free text	what other feedback do yo...	I love donuts
Abuaita, Ashwin	08/01/2023	11:45 PM	11:46 PM	Kilpatrick, Steven	Rating – Satisfaction	how would you rate your ap...	4 Satisfied
Acord, Stewart	08/01/2023	11:47 PM	11:49 PM	Kilpatrick, Steven	Yes/No	did you enjoy your donuts?	1 No
Acord, Stewart	08/01/2023	11:47 PM	11:49 PM	Kilpatrick, Steven	Rating – Frequency	how often would you come ...	2 Rarely
Acord, Stewart	08/01/2023	11:47 PM	11:49 PM	Kilpatrick, Steven	Free text	what other feedback do yo...	No Response

1 - 100 of 131 100 K < 1 2 > >



To use this report, you need access to view Appointment Feedback Responses for the respective Care Unit as well as access to the report to see the report and its results.






Appointment/Visit Reports

Appointment Campaigns Report

This report shows all Appointment Campaign requests and response information for a Care Unit. A single row represents a single appointment campaign request per student.

Report Results									
Search in Results									
<input type="checkbox"/>	STUDENT NAME	EMAIL	STUDENT ID	ALTERNATE ID	CATEGORIES	TAGS	MAJORS		
<input type="checkbox"/>	Aaberg, Annette	sbrown@eab.com	467155408	111111		test tag,Attended Impact,Te...			
<input type="checkbox"/>	Aaberg, Quincy	hhh@mdd.com	425430011			trio,test tag,Nick's Tag,Atten...			
<input type="checkbox"/>	Aadland, Jorn		601798534			trio,test tag,Attended Orient...			
<input type="checkbox"/>	Aadland, Katie		659900449			trio,test tag,Attended Orient...			
<input type="checkbox"/>	Aagaard, Elliott		881656272			trio,test tag,Attended Orient...			
<input type="checkbox"/>	Aagaard, Sasha	pzvfvyw1@drdajhg.ujm.orq	800852904			trio,test tag,Advising Self As...			

0 selected  

1 - 100 of 208     

To use this report, you need access to view Appointment Campaigns for the respective Care Unit as well as access to the report to see the report and its results.

View the Appointment Campaign Report Data Fields article [here](#).

Appointment Requests Report

This report shows any appointment request created by a user in Navigate360. A single row in the report represents a single appointment request within the date range chosen. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any appointment requests in the date range chosen.

Report Results

Search in Results

<input type="checkbox"/>	CARE UNIT	REQUESTED SERVICES	REQUESTED COURSE NAME	REQUESTED COURSE NUM...	LOCATION	REQUESTED MEETING TIMES	REQUESTED ON D
<input type="checkbox"/>	Advising Finance & etc.	AService without Course	English	E101	Washington DC or VA office		11/20/2020
<input type="checkbox"/>	Advising Finance & etc.	AService without Course			KIOSK LOCATION (NO SER...	testing data	02/05/2021
<input type="checkbox"/>	Advising Finance & etc.	AService without Course			KIOSK LOCATION (NO SER...	Testing	03/01/2021

Appointment Summaries Report

This report shows any Appointment Summary created by a user within the platform.

Note. An appointment can be either a scheduled or drop-in interaction with a student. It can also include canceled appointments and no-shows if the boxes are checked in the Data Filters.

A single row in the report represents a single Appointment Summary with a Created Date in the date range chosen. If the Appointment Summary was created for multiple students, you find one row per student with the summary report data. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any appointment summaries in the date range chosen.

The data returned in the Appointment Summaries report is Care Unit-specific. To access the report’s data, users must have a role with access to a given Care Unit and the ability to view Appointment Summaries within that Care Unit. They also need the **View Appointment Summaries Report** permission.

View the Appointment Summary Report Data Fields article [here](#).

Report Results

Search in Results

<input type="checkbox"/>	CARE UNIT	SCHEDULED SERVICES	REPORTED SERVICES	SCHEDULED COURSE NAME	SCHEDULED COURSE NUM...	REPORTED COURSE NAME	REPORTED COURSE I
<input type="checkbox"/>	Advising Finance & etc.	AService with Course	AService with Course				
<input type="checkbox"/>	Advising Finance & etc.	AService with Course	AService with Course	English	E101	English	E101
<input type="checkbox"/>	Advising Finance & etc.	AService with Course	AService with Course	English	E101	English	E101

0 selected

1 - 3 of 3 K < 1 > X

Appointments Report

This report shows any appointment created by a user in Navigate360. A single row in the Appointments Report represents a single appointment instance with the Appointment Date within the date range chosen. If the appointment instance is a group appointment, you see a single row per student in the appointment. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any appointments in the date range chosen. An appointment must have an attendee in order for it to pull in the Appointments Report.

Report Results

Search in Results

<input type="checkbox"/>	STUDENT NAME	EMAIL	STUDENT ID	ALTERNATE ID	CATEGORIES	TAGS	MAJORS
<input type="checkbox"/>	435, Support	ccox@eab.com					
<input type="checkbox"/>	Belile, Emily		835311971				
<input type="checkbox"/>	Bishop, Winston	lnaselli@eab.com	wbishop	wb			
<input type="checkbox"/>	Helfert, Miyo	eab@test.com	000266309		Track and Field		
<input type="checkbox"/>	Norris, Kristen	kmnorris08@gmail.com					
<input type="checkbox"/>	Ogre, Shrek	shrekogre1234.com	OnionsYUM		Football, Pell Eligible		

0 selected

1 - 9 of 9 | 100 | < 1 > >|

The data in the Appointments report is Care Unit-specific. To view and access the data, users must have a role with access to a given Care Unit and the ability to view appointments within that Care Unit. They also need the **View Appointments Report** permission to see the link to the report.

Important. The V3 Appointments Report currently does not have a Students Without Appointments mode. If you need that, use the V2 report.

View the Appointments Report Data Fields article [here](#).

Check-Ins Report

The Check-Ins report shows *any* check-in for a visit in Navigate360. This includes appointments, track time, and record visit check-ins. A single row represents a single check-in within the date range chosen. This includes Appointments, Track Time, and Record Visit check-ins. If you have selected an enrollment term or terms, the student must be active in the terms selected to be returned in the results. Otherwise, the report retrieves all students active in any term with a check-in in the selected date range.

Report Results

Search in Results

<input type="checkbox"/>	≡	CARE UNIT	STUDENT SERVICES	COURSE NAME	COURSE NUMBER	LOCATION	CHECK IN DATE	CHECK IN TIME
<input type="checkbox"/>	≡	Academic Center for Excell...	Advising Help			Academic Success Coachin...	09/05/2023	02:19 PM
<input type="checkbox"/>	≡	Advising Whitehurst Univer...	Event attendance			Academic Advising Center (...)	09/05/2023	11:31 AM

0 selected

1 - 2 of 2 100 K < 1 > X

To use this report, a user needs the **View Check-in Report** and **View Students Checked-In/Out** permissions.

View the Check-Ins Report Data Fields article [here](#).

Intervention Reports

Alerts Report

The Alerts report includes any user-created alert associated with the Navigate360 platform, along with associated details. This covers alerts created by campaigns or ad-hoc alerts. A single row represents a single alert instance within the selected date range. If you filter by enrollment terms, only students active in the terms return in the report results. If you do not filter by enrollment terms, you retrieve all students active in any term with any Alert instances in the date range chosen.

Report Results

Search in Results

<input type="checkbox"/>	≡	STUDENT IS ACTIVE	CARE UNIT	ALERT REASONS	COURSE NAME	COURSE NUMBER	ALERT CREATED AT DATE	ALERT CREATED A
<input type="checkbox"/>	≡	Yes		JAM test alert	Hogwarts: A History	0731	07/20/2023	11:30 AM
<input type="checkbox"/>	≡	Yes		Tutoring Referral (Negative)			08/10/2023	09:09 AM
<input type="checkbox"/>	≡	Yes		Attendance Concerns (Neg...			08/11/2023	10:00 AM
<input type="checkbox"/>	≡	Yes	JB Advising	JB HR Test (Neutral)	Music Theory I	101	08/10/2023	01:45 PM
<input type="checkbox"/>	≡	Yes	JB Advising	JB HR Test (Neutral)	Music Theory I	101	08/10/2023	02:16 PM

To use this report, a user needs the **View Alerts Report** permission.

View the Alerts Report Data Fields Article [here](#).

Cases Report

This report shows any Case created by a Navigate360 user and the associated details. The Cases report allows you to learn about open or closed cases at your institution, including who opened the case, who is assigned to the case, and the Case Closed Reason.

A single row represents a single Case instance in the date range. If you have selected an enrollment term or terms, the student must be active in the terms selected, otherwise the report pulls all students active in any term with a case in the selected date range.

Report Results								
Search in Results								
<input type="checkbox"/>	≡	CARE UNIT	ALERT REASONS	COURSE NAME	COURSE NUMBER	OPENED BY	OPENED AT DATE	OPENED AT TIME
<input type="checkbox"/>	≡		Tutoring Referral			435, Support	08/10/2023	09:09 AM
<input type="checkbox"/>	≡		Attendance Concerns			Dore, Albus	08/11/2023	10:00 AM
<input type="checkbox"/>	≡	Academic Support - FLC	Attendance Neutral	Environmental Sustainability	ES400	Naselli, Lia	08/17/2023	02:49 PM
<input type="checkbox"/>	≡		Attendance Concerns			Dore, Albus	08/11/2023	10:00 AM
<input type="checkbox"/>	≡		Tutoring Referral			435, Support	08/10/2023	09:09 AM
<input type="checkbox"/>	≡		Attendance Concerns			Dore, Albus	08/11/2023	10:00 AM

0 selected

1 - 65 of 65 K < 1 > X

The data returned in the report is Care Unit-specific. To access the report's data, the user must have a role with access to a given Care Unit and the ability to view cases within that Care Unit. The user also needs the **View Cases Report** permission.

View the Cases Report Data Fields article [here](#).

Enrollment Census Report

This report shows any Enrollment Census response created by a Navigate360 staff user.

A single row represents a single Enrollment Census response instance with a created date in the date range chosen.

For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you will retrieve all students active in any term with any Enrollment Census responses in the date range chosen.

Report Results

Search in Results

<input type="checkbox"/>	≡	CAMPAIGN CREATOR NAME	CAMPAIGN CREATOR ID	CAMPAIGN CREATOR EMAIL	COURSE NAME	COURSE NUMBER	SECTION NAME	SECTION TYPE
<input type="checkbox"/>	≡	Doyle, Erin	98769876	edoyletest@eab.com	INTRO - Irish Dance - WL	54321	Summer1	
<input type="checkbox"/>	≡	Cavise, Fiona	fcavise@eab.com	fcavise@eab.com	Biochemistry 123	12345	Summer 2019	
<input type="checkbox"/>	≡	Holoman, Brandy		bholoman@eab.com	Learning Framework	EDUC 1300	1211	
<input type="checkbox"/>	≡	Holoman, Brandy		bholoman@eab.com	Learning Framework	EDUC 1300	1211	
<input type="checkbox"/>	≡	Baxtor, Raven	r.baxtor	ashleighmurray@eab.com	Fashion Studies -AJM	201	Fashion Merchandising	
<input type="checkbox"/>	≡	Cavise, Fiona	fcavise@eab.com	fcavise@eab.com	Biochemistry 123	12345	Summer 2019	

0 selected

1 - 100 of 143 K < 1 2 > |

To view this report, users need the **View Enrollment Census Report** permission.

View the Enrollment Census Campaigns Report Data Fields article [here](#).

Progress Report Campaigns Report

This report shows all Progress Report campaign requests and response information.

A single row represents a single Progress Report request per student created in the date range chosen.

Report Results

Search in Results

<input type="checkbox"/>	≡	CAMPAIGN NAME	CAMPAIGN CREATION DATE	CAMPAIGN CREATION TIME	CAMPAIGN EXPIRATION DATE	CAMPAIGN EXPIRATION TIME	CAMPAIGN CREATOR NAME	CAMPAIGN CREAT
<input type="checkbox"/>	≡	Test -AJM	08/10/2023	08:17 AM	09/30/2023	12:00 AM	435, Support	
<input type="checkbox"/>	≡	Test -AJM	08/10/2023	08:17 AM	09/30/2023	12:00 AM	435, Support	
<input type="checkbox"/>	≡	WL Test - PR At Risk	08/09/2023	12:56 PM	11/07/2023	12:00 AM	435, Support	
<input type="checkbox"/>	≡	WL Test - PR At Risk	08/09/2023	12:56 PM	11/07/2023	12:00 AM	435, Support	
<input type="checkbox"/>	≡	AJM test 8/9	08/09/2023	01:52 PM	11/07/2023	12:00 AM	435, Support	
<input type="checkbox"/>	≡	AJM Test campaign (Part 2...	08/09/2023	02:19 PM	11/07/2023	12:00 AM	435, Support	

0 selected

1 - 8 of 8 K < 1 > |

To view this report, users need the **View Progress Report Campaigns Report** and **View Progress Reports on Students** permissions.

View the Progress Report Campaign Report Data Fields article [here](#).

Progress Reports Report

This report shows any Progress Reports and Progress Report responses created by a user within the platform.

A single row represents a single Progress Report instance with a created date in the date range chosen. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you will retrieve all students active in any term with any Progress Reports in the date range chosen.

Report Results									
Search in Results									
<input type="checkbox"/>		CREATOR NAME	CREATOR ID	CREATOR EMAIL	ALERT REASONS	DATE SUBMITTED	TIME SUBMITTED	MARKED AT-RISK	
<input type="checkbox"/>		Higuera, Maria	mhiguera@eab.com	mhiguera@eab.com	Attendance Concerns	07/05/2023	04:57 PM	<input type="button" value="Yes"/>	
<input type="checkbox"/>		Higuera, Maria	mhiguera@eab.com	mhiguera@eab.com	JAM test alert	07/20/2023	11:30 AM	<input type="button" value="No"/>	
<input type="checkbox"/>		Sullivan, Bonnie K		bsullivan@eab.com		07/18/2023	12:22 PM	<input type="button" value="No"/>	
<input type="checkbox"/>		Higuera, Maria	mhiguera@eab.com	mhiguera@eab.com		07/05/2023	04:59 PM	<input type="button" value="No"/>	
<input type="checkbox"/>		Higuera, Maria	mhiguera@eab.com	mhiguera@eab.com	JAM test alert	07/20/2023	11:30 AM	<input type="button" value="Yes"/>	
<input type="checkbox"/>		Sullivan, Bonnie K		bsullivan@eab.com	Behavioral Concerns	07/18/2023	12:22 PM	<input type="button" value="No"/>	

0 selected

1 - 12 of 12

To view this report, users need the **View Progress Reports Report** and **View Progress Reports on Students** permissions.

View the Progress Reports Report Data Fields article [here](#).

Operations Reports

Course Section Capacity Report


Smart Guidance Reports

Student Compliance to Advisor Plan Report

Note. This report is for institutions with Next Generation Academic Planner.

This report will show student compliance with academic plans created by their advisors. A row represents one academic plan created by one advisor for one student and the student's compliance with that plan. If an advisor has created multiple plans for one student, each one will be listed as a separate record.

Student Compliance to Advisor Plan Report



▼ Report Information

Unsaved Report

Load Saved Report ▼ [Save As...](#)

Data Filters [Share These Filters](#)

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

Field *	Condition	Low *	High *
① Overall Plan Compliance × ▼	between ▼	20	60

[+ Add Filter](#)

Include Inactive Users Include My Students Only

[Support](#)

To access this report, a user must have the **View Advisor Plan Compliance Report** permission.

Academic Plan Utilization

Note. This report is for institutions with Next Generation Academic Planner.

This report will show how students are utilizing their academic plans. A single row represents a single course chosen on a student plan.



Academic Plan Utilization

Report Information

Unsaved Report

Load Saved Report Save As...

Data Filters

Share These Filters

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

Field *	Condition	Value *
1 Term	contains any	SPRING 2022 (TERM #3) SPRING 2022 (TERM #1) SUMMER 2022 (TERM#2)

+ Add Filter

To access data within this report, the user must have the View Academic Plan Utilization Report permission.

Surveys Report

Note. This report is for institutions who use Survey Builder in Smart Guidance. It updates every day at 7 AM in your school's main time zone.

The **Survey Report** shows Survey question results from any non-campaign surveys that were created and sent from the Survey Builder tool in the CAT. The results in this report do not show those responses from surveys created using the Survey Campaign functionality. Each row shows data related to a single answer to a survey.

Data Filters [?]

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

Field * Condition

① Care Unit × is not empty

+ Add Filter

Run Report

Report Results

Search in Results

<input type="checkbox"/>	≡	STUDENT NAME	⌵	EMAIL	⌵	STUDENT ID	⌵	ALTERNATE ID	⌵	CATEGORIES	⌵	TAGS	⌵	CLAS
<input type="checkbox"/>	≡	Ansara, Berry		dcornwell@al.com		31128754		testuser3@eab.com						Jun
<input type="checkbox"/>	≡	Anstey, Gaetano		cstembel@eab.com		15938570		sybkwjefn						Othe
<input type="checkbox"/>	≡	Anstey, Gaetano		cstembel@eab.com		15938570		sybkwjefn						Othe
<input type="checkbox"/>	≡	Anstey, Gaetano		cstembel@eab.com		15938570		sybkwjefn						Othe

Users need the **View Surveys Report** permission in Navigate360 Staff to see this report.

Survey Campaigns Report

Note. This report is for institutions who use Survey Campaigns. It updates every day at 7 AM in your school's main time zone.

The Survey Campaign Report shows survey question results from surveys that were created and sent from Survey Campaigns. The results in this report will not return those responses from surveys created and sent in Survey Builder. Each row shows data related to a single answer to a Survey Campaign created in the Staff platform.

Users need the **View Survey Campaigns Report** permission in Navigate360 Staff to see this report.

Staff Reports

Availabilities Report

This report shows any appointment, campaign, or drop-in availability created in the platform. These can be "forever" availabilities or availabilities for a defined date range.

Note. For an Availability to show up in the report, the Availability must have overlap with any date within the date range. For example, if the date range is March 1st to March 31st and an Availability runs February 15th to March 1st, it appears in the report. This is different than our previous filtering.

Users with certain permissions can use this report to create and edit Availability for other users. To create Availabilities, users need that permission. To edit Availabilities using this report, the user needs access to edit Availabilities within a given Care Unit.

Users also need the **View Availabilities Report** permission to see the report and/or create and edit Availabilities.

A single row in this report represents a single availability instance within the date range chosen. The *Active* field shows whether the availability is active or inactive on the day that you run this report.

Report Results								
Search in Results								
<input type="checkbox"/>	≡	STAFF NAME	STAFF ID	STAFF ALTERNATE ID	STAFF E-MAIL	CARE UNIT	STUDENT SERVICES	COURSES
<input type="checkbox"/>	≡	22, Support			stipton@eab.com	Advising	Academic Challenges, Choo...	
<input type="checkbox"/>	≡	Abbott, Mae (Google Sync)	MA01	199887623584	abbotmae@eab.com	Advising CU	Advisor with Course(WT)	ARM1, B100, CH3
<input type="checkbox"/>	≡	Bailey, Sonya	s01	314757440703	mae.moore@toycorwin.co	DSS	Career development	
<input type="checkbox"/>	≡	Bekkouche, Chaouki	c001	437553093315	gene@lemke.io	Advising CU	Academic Challenges	
<input type="checkbox"/>	≡	Bekkouche, Chaouki	c001	437553093315	gene@lemke.io	Advising	Academic Challenges	

0 selected

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The Availabilities report allows you to learn who or how many staff are available for particular Services, Care Units, Locations, or courses.

View the Availabilities Report Data Fields article [here](#).

Student Data Reports

Attendance Report

This report shows any attendance entry created by a user in Navigate360.

A single row represents a single attendance entry with a created date in the selected date range. If the attendance entry was created for multiple students, you find one row per student with the attendance data. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any attendance entry in the date range chosen.

Report Results									
Search in Results									
<input type="checkbox"/>		CREATOR NAME	CREATOR ID	CREATOR EMAIL	SUBMITTED ON DATE	SUBMITTED ON TIME	COURSE NAME	COURSE N...	
<input type="checkbox"/>		Ogre, Fiona	DragonsWOO	fionaogre@shrek.com	10/02/2023	09:31 AM	Swamp Ecosystems	1028	
<input type="checkbox"/>		Stoy, Jen		jstoy@eab.com	08/28/2023	10:25 AM	Swamp Ecosystems	1028	
<input type="checkbox"/>		Stoy, Jen		jstoy@eab.com	08/28/2023	10:25 AM	Swamp Ecosystems	1028	
<input type="checkbox"/>		Higuera, Maria	mhiguera@eab.com	mhiguera@eab.com	06/16/2023	04:10 PM	Hogwarts: A History	0731	
<input type="checkbox"/>		Higuera, Maria	mhiguera@eab.com	mhiguera@eab.com	06/16/2023	03:41 PM	Hogwarts: A History	0731	
<input type="checkbox"/>		Doyle, Erin	98769876	edoyletest@eab.com	08/24/2022	09:56 AM	INTRO TO AFR & AFR-AM H...	AAS-1140	

0 selected

1 - 100 of 1465 **1** 2 3 4 5

To access this report, users need the **View Attendances Report** permission.

View the Attendance Report Data Fields article [here](#).

Notes Report



This report shows any Note created by a Navigate360 user in the platform. The Notes report allows partners to see how information outside appointments is being recorded by staff who have access to Navigate360.








A single row represents a single Note with a created date within the selected date range. If the Note was created for multiple students, you find one row per student with the Note data.

For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you will retrieve all students active in any term with any notes in the date range chosen.

To access this report, users need the **View Notes Report** permission. To see other users' private notes in this report, users need the **View Private Notes Created by Other Users** permission and for private notes to be active for your institution.

Report Results								
Search in Results								
<input type="checkbox"/>	NOTE REASON	NOTE CONTENT	CREATED AT DATE	CREATED AT TIME	CREATOR NAME	CREATOR ID	CREATOR EMAIL	
<input type="checkbox"/>	Academic Planning	adsdq	08/06/2019	09:04 AM	ASaboe, ANicholas		nsaboe@eab.cc	
<input type="checkbox"/>		test	10/25/2018	12:02 PM	435, Support		wolfowitz@eab.	
<input type="checkbox"/>	Academic Planning	Testing note reasons	07/17/2019	04:20 PM	Kilpatrick, Steven	123456792	skipatrick@eab	
<input type="checkbox"/>	New Note Reason	Here is a note! I can make thi	07/24/2019	03:53 PM	Kilpatrick, Steven	123456792	skipatrick@eab	
<input type="checkbox"/>		Text	08/26/2019	02:30 PM	Brown, Stephen		sbrown@eab.cc	
<input type="checkbox"/>	LOA	Admin	04/23/2020	03:42 PM	435, Support		daverbach@eat	

0 selected  

1 - 100 of 924       

View the Notes Report Data Fields article [here](#).

Student Enrollments Report

This report shows any course enrollments a student has in a selected term. A single row represents a single enrollment instance within the selected term. Users find one row per student course enrollment with the associated data. This means if a student is enrolled in five classes, you see five lines for that particular student. For a student to be returned in the report, the student must be active in the selected term.



Students Enrollments Report

Report Information

Unsaved Report

Load Saved Report

Save As...

Students Report

This report shows general information for students in Navigate360. It also shows if the student can receive SMS communications from the Navigate360 short-code or a telephone number from the pool. A single row represents a single student in the Navigate360 platform.

To use this report, a user needs the **View Student Info Report** permission.

Report Results								
Search in Results								
<input type="checkbox"/>	≡	STUDENT NAME	EMAIL	STUDENT ID	ALTERNATE ID	CATEGORIES	TAGS	MAJORS
<input type="checkbox"/>	≡	Abernathy, Asia	wilfrid@mangusikowski.c...	984845531102	230577410873	Freshmen Cohort Fall 2011		
<input type="checkbox"/>	≡	Anderson, Bianka	jamie_bosco@dare.info	041571212102	854077761885	Program: Credential		
<input type="checkbox"/>	≡	Bekk, Chao	chaoukiqa@gmail.com	test1234				
<input type="checkbox"/>	≡	Bolden, Slade	sbolden@al.com	88765				
<input type="checkbox"/>	≡	Carter, Shyheim	dhenry@al.com	3448374995		Foot-ball		
<input type="checkbox"/>	≡	Cronin, Carolina	christ@hyattdonnelly.net	231123425119	769510455674	Program: Undergraduate De...		

0 selected

1 - 39 of 39 100

This report can be used to confirm that student data is coming into the system properly.

View the Student Info Report Data Fields article [here](#).

Study Hall Report

This report shows any study hall check-ins and hours created by a user within the platform. A single row represents a single student with a check-in for study hall in the chosen term. For a student to be returned in the report, the student must be active in the selected term.

Report Results

Search in Results

<input type="checkbox"/>	≡	GPA	◊	TERM FOR REQUIRED STU...	◊	REQUIRED TIME PER WEEK...	◊	TOTAL REQUIRED TIME Fo...	◊	COMPLETED TIME (IN MIN)	◊	CHARITY TIME (IN MIN)	◊	REMAINING TIME PER WE...	◊
<input type="checkbox"/>	≡					732		1,464		0		0		1,464	

To view this report, users need the **View Study Hall Report** permission.

Building a Report

Add a Data Filter

To generate a report, begin with creating your search parameters. Use Data Filters to define report-specific behavior or objects. Select a field, condition, and value for each row. Filters can be mixed and matched for more precision in your report.

Tips and tricks:

- Fields are specific to your report type.
- Conditions vary by data type. For example, if a field contains dates, you can filter by a date range.
- Values are specific to each field.
- Want all available data? Filter by a required field and select the "is not empty" condition.

Data Filters ?

+ Add Filter

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

Field *

1

▼

×

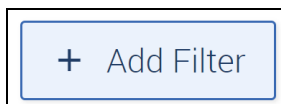
Filters Logic

Filters Logic options determine how your criteria are interpreted by the platform. By default, Navigate360 has the report match all filters.

Option	Description
Match all Filters (AND)	Use the match all filters option to create a logical condition that requires all specified criteria to be true for a record to be included in the report results. AND logic will narrow your results.
Match any Filters (OR)	Use the match any filters option to a logical operator that connects multiple conditions, where at least one condition must be true for a record to be included in the report results. OR logic will broaden your results.
Advanced (AND/OR)	Use Advanced to create more complex logic when creating a report to specify conditions that must be met. "AND" requires all conditions to be true, while "OR" requires at least one condition to be true.

Add Additional Search Criteria

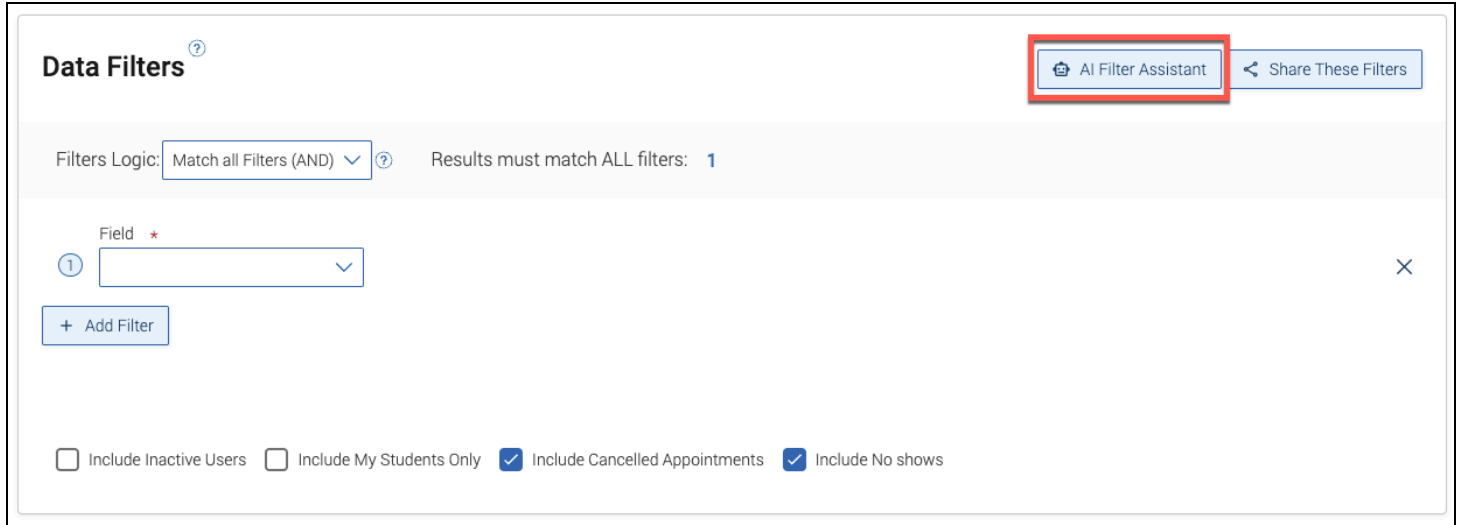
You can add multiple filters to a report. Click **+Add Filter** to add another filter to the report.



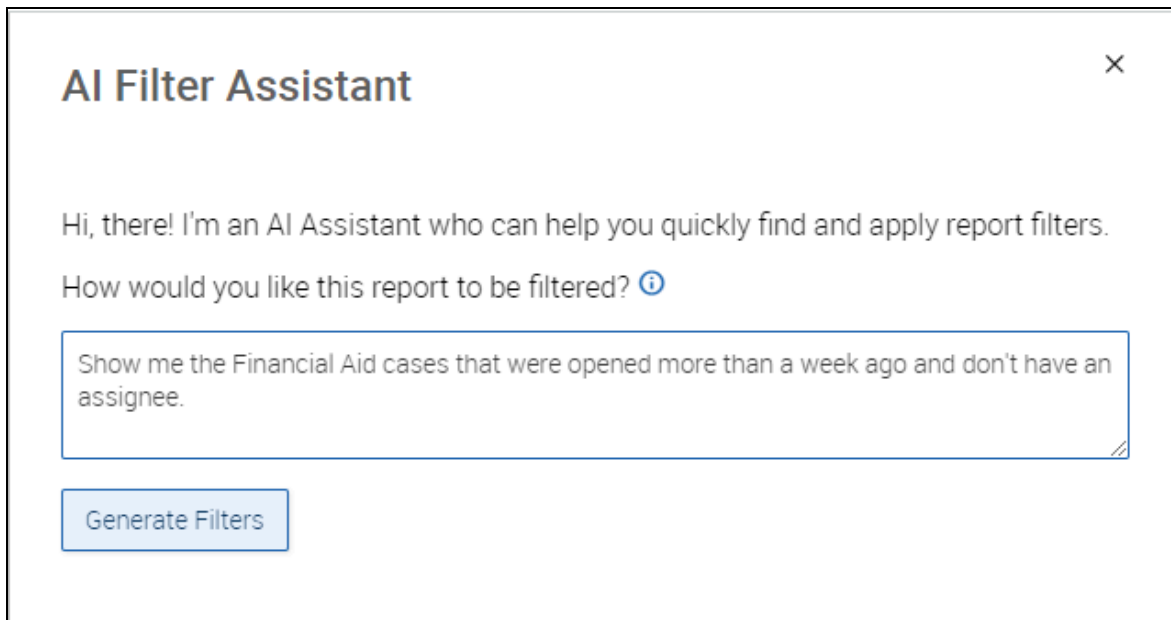
AI Filter Assistant

Note. AI Filter Assistant is only available to partners with NavAI. Reach out to your Strategic Leader if you have questions about your partnership.

The AI Filter Assistant works with Navigate360 V3 reports to quickly find and apply report filters. When enabled, open the AI Filter Assistant from the Data Filters panel in V3 reports.



The panel opens. Users then enter a prompt for their desired report and select **Generate Filters**.



The AI Filter Assistant then adds filters for the report. Users can then adjust the filters or modify the prompt again. If a user modifies a prompt, the AI Filter Assistant regenerates the filters.

Data Filters [?]

Filters Logic: Match all Filters (AND) [?] Results must match ALL filters: **1 AND 2 AND 3**

Field *	Condition	Value *
① Care Unit <input type="button" value="x"/>	contains any <input type="button" value="v"/>	Financial Aid <input type="button" value="x"/>
② Opened At Date <input type="button" value="x"/>	before <input type="button" value="v"/>	04/16/2024 <input type="button" value="v"/>
③ Case Assignees (user list) <input type="button" value="x"/>	is empty <input type="button" value="v"/>	

Include Inactive Users
 Include My Students Only

To use AI Filter Assistant, select the **AI Filter Assistant** permission on the **Edit Role** page for users and user roles that you want to have access to this feature once it is turned on for your institution.

NavAI

- AI Content Generation and Message Enhancement [?]
- AI Filter Assistant [?]
- Knowledge Bot [?]
- Administration for Knowledge Bot [?]

Additional Checkboxes

Many of the reports include extra checkboxes and most will include the checkboxes *Include Inactive Users* and *Include My Students Only* (both unchecked) by default. These help further narrow your report results. An example of the filter checkboxes available in the Appointments Report is displayed below.

Include Inactive Users
 Include My Students Only
 Include Cancelled Appointments
 Include No Shows
 Report Filed Only
 Campaign Appointments Only

Run Report

Once your search criteria are set, click **Run Report** to run the report. Note that any reports with more than 20,000 rows will not display results; instead, you will have to download a CSV of the results.

A blue rectangular button with the text "Run Report" in white.

Sharing Data Filters

Users can share the filters they select for a report by choosing the **Share These Filters** button.

A horizontal header bar with the text "Data Filters" and a question mark icon on the left, and a "Share These Filters" button on the right. The button is highlighted with a red border.

Data Filters [?]

Share These Filters

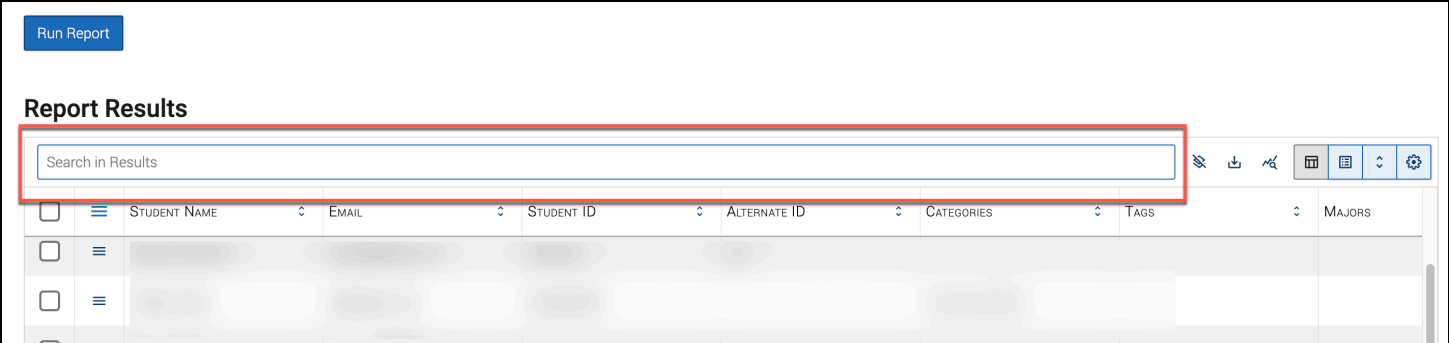
Clicking the button copies a URL to the user's clipboard. The user can then paste the URL and send it to another user. If the user has the correct permissions to see the report AND filters chosen, clicking the URL opens the Report page with pre-filled filters. If they do not have the correct permissions, users receive a Permission Denied notification.

Working with Report Results

Once you have run your report, the results populate in the table below the data filters. This is called the grid. The grid has a lot of features to help users with the report data, described in the next sections.

Search in Results

When your Data Filter results are shown, you can enter more information to further narrow down your search results. Note that as in V2 reports, you can click the student's name in report results and it will open the Student Profile.

A screenshot of the "Report Results" interface. At the top left is a "Run Report" button. Below it is the "Report Results" section. A search bar labeled "Search in Results" is highlighted with a red border. To the right of the search bar are icons for search, print, refresh, grid, list, and settings. Below the search bar is a table with columns: STUDENT NAME, EMAIL, STUDENT ID, ALTERNATE ID, CATEGORIES, TAGS, and MAJORS. The table contains several rows of data, with the first row being partially visible.

Run Report







Report Results


Search in Results

	STUDENT NAME	EMAIL	STUDENT ID	ALTERNATE ID	CATEGORIES	TAGS	MAJORS
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Icons

Next to the search bar there are icons, explained in the table.

Icon	Description	Behavior
	Clear all sorts and filters	When selected, the sorts in the grid and the filters in the search results are cleared. Grid settings are not applied.
	Export	When selected, the grid is exported into a CSV file. Grid settings (if any) are applied. More information below.
	Load grid into pivot table	When selected, the grid loads into a pivot table. More information below.
	View grid table	When selected, the grid search results display.
	View column manager	When selected, you can adjust the column order by dragging or clicking each item up or down the list. Use the checkboxes to toggle column visibility. Use the caret symbol to move an item up or down the list by one position or move an item to the top or bottom of the list. Any changes will revert back to the default order when you exit this page. This replaces the Show/Hide Columns action from legacy reports.
	View sort manager	When selected, you can create a multi-column sort. If the sort buttons are used on the table then the multi-column sort is reset and sorting occurs by only one

Icon	Description	Behavior
		column. Any changes will revert back to the default order when you exit this page.
	View grid settings	When selected, you can configure how the grid renders and exports data. Any changes will revert back to the default order when you exit this page. More information below.

Export Reports

Important. All exports in these reports are in CSV format. This standardizes the export and allows any version of Excel to open the file. However, **View Grid Settings** lets users customize the download filename, quote character, and delimiter for convenience.

All reports can be exported. Any report with more than 20,000 lines does not display in the grid and must be exported.

To export, select the **Export icon** after taking any actions (e.g., showing/hiding columns) you want to do before creating an export file.

The CSV file downloads.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Student Name	Email	Student ID	Alternate ID	Categories	Tags	Majors	Classifier	Assigned Sta	Cumulative C	Student Is	Ac Care Unit	Scheduled S	Scheduled C	Scheduled C	Location	Scheduled M	Appointment	Scheduled S	Scheduled S	Scheduled Er
2	435, Support	ccox@eab.com									Yes	Academic Ce	Advising Help			ASC Virtual T	In-Person	Scheduled	9/1/23	2:00 PM	9/1/23
3	Belile, Emily		835311971								Yes	Yackley, Elizabeth (Monit	Advising Wh	General Advising		Academic Ac	Virtual	Scheduled	9/7/23	10:00 AM	9/7/23
4	Bishop, Wins	lnaselli@eab	wbishop	wb				Sophomore (Miller, Nick (Advisor); Day	Yes	Yes	Advising	General Advising		Adams Mill	Tutoring	Drop-in	8/30/23	2:00 PM	8/30/23	
5	Helfert, Miyc	eab@test.co	266309		Track and Field			Senior (Fall	! Owens, Jessica (Academic	Yes	Yes	Academic Ce	Advising Help		Student Supp	In-Person	Scheduled	8/28/23	9:00 AM	8/28/23	
6	Norris, Kriste	kmorris08@gmail.com									Yes	KB Test Care	Advising		KB Test Loca	In-Person	Scheduled	9/1/23	3:00 PM	9/1/23	
7	Ogre, Shrek	shrekogre12	OnionsYUM		Football,Pell	Eligible		Junior (Sprin	Dillman, Tyler (Tutor); Lyn	Yes	Yes	Advising Ath	Eligibility Qu	Swamp Ecos	1028	Student Supp	In-Person	Scheduled	9/1/23	10:00 AM	9/1/23
8	Vortex, Cindy	cindy.vortex@cindy.vortex	cindy.vortex	cindy.vortex				Freshman (S	Wheezzer, Carl (Professor)	Yes	Yes	Advising	General Advising		Adams Mill T	In-Person	Scheduled	8/23/23	11:45 AM	8/23/23	
9	Vortex, Cindy	cindy.vortex@cindy.vortex	cindy.vortex	cindy.vortex				Freshman (S	Wheezzer, Carl (Professor)	Yes	Yes	MG Advising	Bio Advising		Adams Mill T	Group	Scheduled	8/23/23	8:00 PM	8/23/23	
10	Winslow, Ed	ashleighmur	24681012		Honor Roll	honors		Sophomore (Dillman, Tyler (Professor);	Yes	Yes	JAM's Study	Student Advising		Murray Studi	Virtual	Scheduled	8/24/23	4:00 PM	8/24/23	

We removed all rows from the top of the file that produced the school name, date ranges, and other added information.


Note. Only the first 32000 characters of a Note show in the report or CSV. This applies to the **Notes Report** only and is due to Excel limitations. To see the full note, go to the Student Profile.

Pivot Tables and Charts


A third-party tool, Flexmonster, is integrated into V3 reports and allows users to create data visualizations and pivot tables within Navigate360. Once report results have generated, click on the icon to load data into a pivot table.

The selection of filters and the arrangement of fields into rows and columns is done in the *Fields* area of the tool. Additional formatting and display options, such as the inclusion of totals and subtotals, are also available.

Grid Analysis



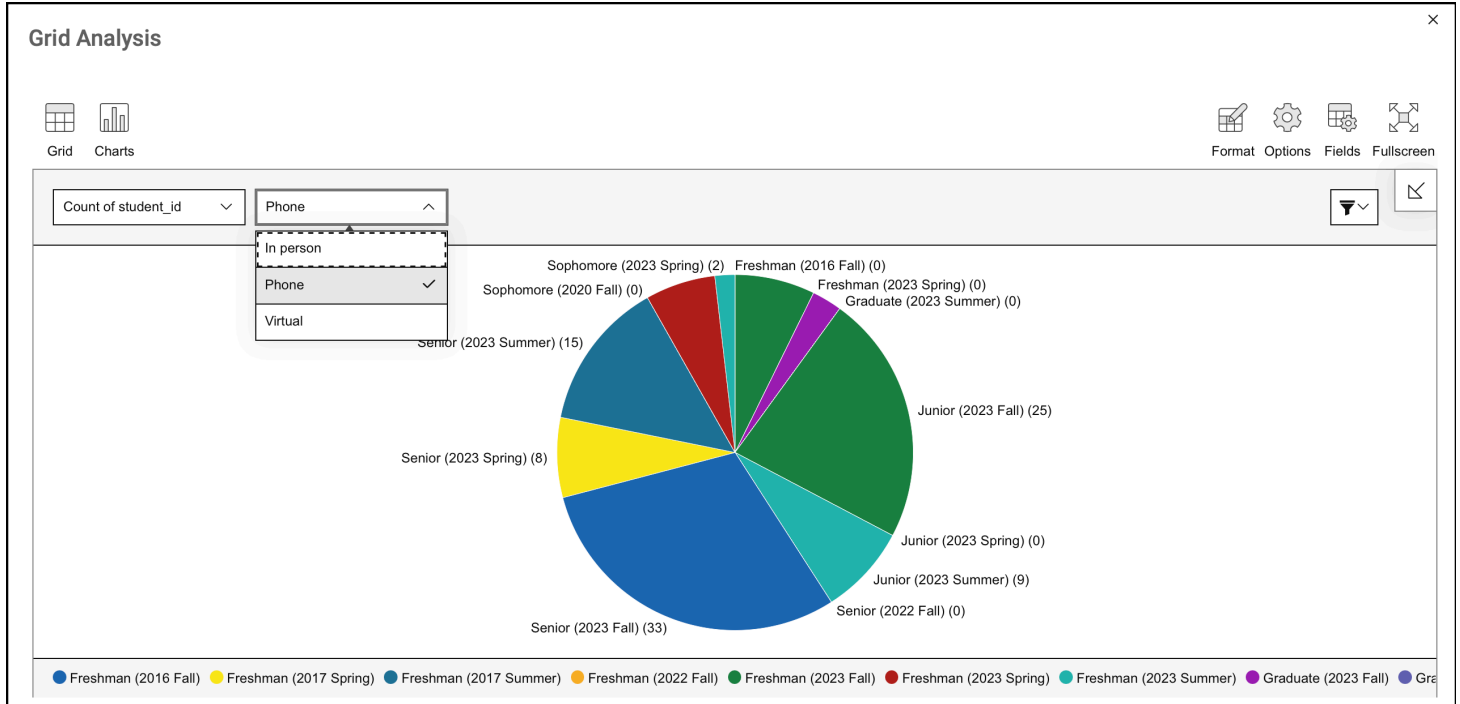
Grid



Charts

	SCHEDULED START DATE All ⚙	SCHEDULED START TIME All ⚙	SCHEDULED END DATE All ⚙	SCHEDULED END TIME All ⚙		
	1	2	3	4	5	6
1	SCHEDULED MEETING TYPE ▾ ⚙					
2	SCHEDULED DURATION (IN MIN) ⚙	In person	Phone	Virtual		
3	105	2	0	0		
4	120	387	0	1		
5	15	102	0	1 137		
6	180	15	0	0		
7	20	3	109	36		
8	30	1 277	1	3 813		
9	45	48	0	273		
10	60	569	0	307		
11	75	1	0	0		
12	90	6	0	0		
13						
14						
15						
16						

Visual displays of the data can be generated by selecting a specific chart type from the *Charts* area of the tool.



Users not yet familiar with pivot table functionality are encouraged to join our [V3 Reports New Feature Spotlight](#), where we will provide more information about pivot tables and charts, use cases for these data visualizations, and how to create them within V3 reports.

Grid Settings

Grid Settings allows you to configure how the grid renders and exports data.

Report Results

🔍 📄 🗑️ 🏠 📄 ⬇️ ⚙️

Grid Settings

Configure how the grid renders and exports data.

Features

Frozen First Column
If set, then the first column will not scroll horizontally

Export Settings

Filename of Download

Quote Character

The character used to quote fields.

Delimiter

The delimiting character, to separate cells. It can be any character except newline, line break, or double-quote.

Skip Empty Lines
If set, then lines that are completely empty (those which evaluate to an empty string) will be skipped.

Use Column Data Key for Header
If set, then the header will use column data key rather than column title.

Configurations

Frozen First Column

If selected, the first column of the grid will not scroll horizontally.

Export Settings

- *Filename of Download*: Enter the name you would like displayed when the grid is exported.
- *Quote Character*: Enter the character used to quote fields.
- *Delimiter*: Enter the delimiting character to separate cells. It can be any character except newline, line break, or double-quote.

Skip Empty Lines

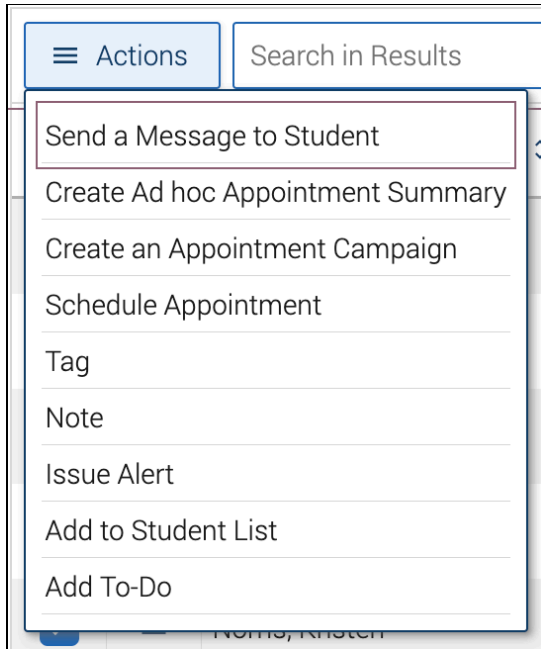
If selected, then the lines that are completely empty (those which evaluate to an empty string) will be skipped.

Use Column Data Key for Header

If selected, then the header will use the column data key rather than the column title.

Report Actions

Users can take action on any report by opening the **Actions** menu in the report results. Below is an example of the Actions menu for the Appointments report.



While most reports have some unique actions, all reports have some similar actions. Unique actions are listed in the Data Dictionary article for the report.

The actions that every report has are listed below.

Send a Message to Student

Sends a message to the students selected by email or text.

Create Ad-hoc Appointment Summary

Opens an Appointment Summary Report for the students selected.

Create an Appointment Campaign

Creates an Appointment Campaign using the selected students.

Schedule Appointment

Creates an Appointment between the students and the person who ran the report.

Tag

Adds a tag to the students selected.

Note

Adds a note to the students selected.

Issue Alert

Issues an alert for the students selected.

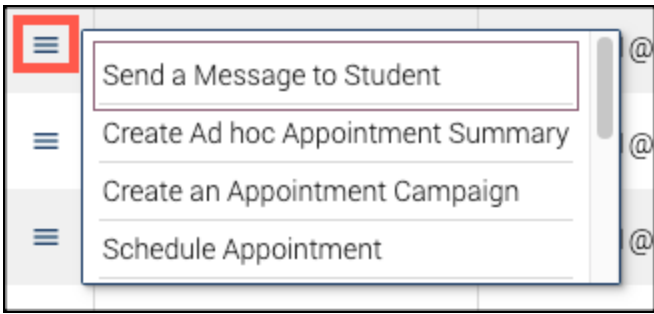
Add to Student List

Adds the selected students to a Student List.

Add To-Do

Adds a staff To-Do for the students selected.

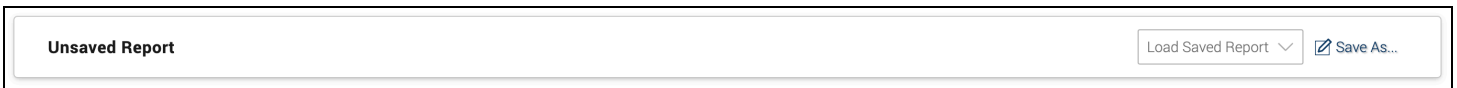
Additionally, by clicking the icon, users can perform actions on an individual student.



Saving a Report

Saved Reports give Navigate360 staff users the ability to save student and activity filters for a particular report to which they have access, much like a Saved Search. Saving a V3 report also saves most grid settings (except column width and columns in the pivot table). This allows users to re-run the search quickly and efficiently without having to reselect the filters each time they access the report. Downloaded Reports will continue to be available in the Download Center for 7 days.

To save a report, run your report as usual and then click the **Save As...** button on the results page.



After creating a saved report, the report will appear on the **Saved Reports** tab.

Reports

My Saved Reports

Standard Reports

My Report Automations

Saved Reports

Access your Saved Reports below. To add a new Saved Report, run a Standard Report and click save from the report results.

ⓘ You Are Currently Viewing Your V3 Saved Reports ✕

Should you need to access your V2 saved reports for any reason, visit [Lists & Saved Items](#).

Reminder: The V2 reports will be deprecated on a later date, to be announced. Additionally the V3 reports cannot currently be scheduled, this functionality is coming soon.

	SAVED REPORT NAME	REPORT TYPE	CREATED ON	USED IN AUTOMATION	ACTIVE SCHEDULE	PAST REPORTS
☰	Alerts-Last-60-Days	Alerts Report	09/06/2023	Yes	No	
☰	Last-14-Days-Appnts	Appointments Report	09/05/2023	No	No	

Report Automations

Users can create automated actions from saved V3 reports. Refer to the [Automated Actions](#) article to find out how. Once an automation is created, it appears on the My Report Automations tab.

Reports

My Saved Reports Standard Reports **My Report Automations**

Report Automations

Use automations to apply common actions to your saved searches on a recurring basis. Note: this list contains automations associated with either a Saved Search or V3 Saved Report.

+ Add Automation

Search in Results

	AUTOMATION NAME	STA...	AUTOMATION TYPE	SAVED REPORT NAME	SAVED REPORT TYPE	MATCHES FOUND	ACTIONS TAKEN	MATCHES ON
	Message New Alerts	Active	Send a Message - E-mail	Last 14 Days Alerts	Alerts Report	0	0	0

1 - 1 of 1 100 1

From this tab, users can edit or delete an automation, or add a new one.