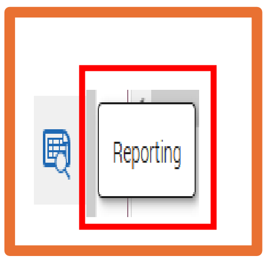
Navigate: Understanding Report Descriptions

V3 Reports contain data and analytic insights related to student success programs. Access to the **Reports** page is permissions based. Therefore, If you have been granted access to the Reports, you may view the Reports landing page by selecting the Reports icon on the left hand-side of your Navigate account.

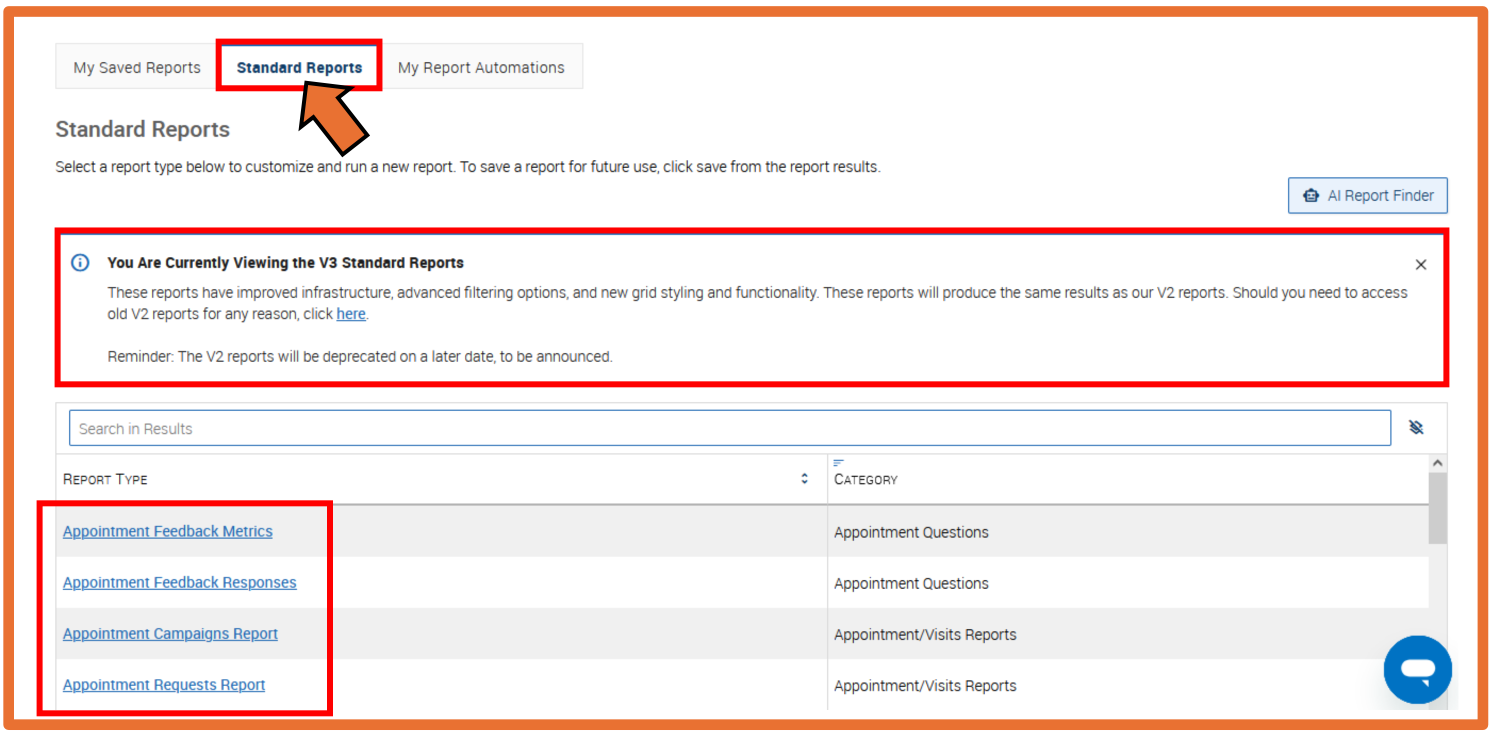


Reporting **(V3 Reports)** is a helpful tool for staff tasked with pulling Reports and analytics related to student success programs. Your role must be given access to the Reports. Each Report has an individual permission for access.

Feature Overview

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

Navigates **V3 Reports** have advanced filtering options and new grid styling and functionality.



This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 02/26/2025, Updated 01/02/2026]**

Report Descriptions

A short description of the various Reports that can be created through the Navigate Reporting feature can be found on the next page. The type of Reports available to each user depends on their role and the permissions they have.

Report Name	Report Description
Appointment Questions 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.
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.
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.
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 Name	Report Description
Appointment Summary Report	This Report shows any Appointment Summary created by a user within the platform. **Please 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.
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. The data in the Appointments Report is Care Unit-specific.
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 the selected date range.

Report Name	Report Description
Automations	
Automations Report	This Report shows automations created by staff users in the Navigate360 platform. A single row represents a single automation created by a user.
Event Campaigns	
Event RSVPs Report	This Report shows Event RSVPs and the related data. A single row represents a single Event RSVP response. The data returned in the Report is Care Unit specific.
Events Report	This Report includes any Event and the related information. A single row represents a single event. The data returned in the Report is Care Unit-specific.
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.
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. The data returned in the Report is Care Unit-specific.

Report Name	Report Description
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.
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.
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.
Smart Guidance Reports	
Journeys Report	Journeys are Care Unit-specific sets of steps that can be assigned to students to help them complete a goal. The Journeys Report shows all steps students have been assigned for a Journey. Each row is an individual step in a Journey a student has been assigned and any Steps the student completed before unassigning a Journey.

Report Name	Report Description
Survey Campaign Report	**Please 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.
Survey Report	**Please 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.
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. **Please 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. 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. The Availabilities Report allows you to learn who or how many staff are available for particular Services, Care Units, Locations, or courses.

Report Name	Report Description
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.
LMS Assignments Report	This Report shows any assignment for a course imported from a Learning Management System (LMS). **Please Note:** This Report is only available to schools with the LMS data integration. A single row represents a single assignment per student within the selected term. For example, if a student has five assignments for a single course, there will be five rows for that particular student. For a student to appear in this Report, they must be active in the terms selected.
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.

Report Name	Report Description
Students 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. This Report includes one row for every currently or previously enrolled course per student.
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. This Report can be used to confirm that student data is coming into the system properly. It can also be used to recreate the *Students Without Appointments* version of the Appointments Report. To recreate the *Students Without Appointments* version of the Appointments Report in the V3 Report, use the *Number of Appointments* filter. When set to zero, the results display all students with zero appointments, which replicates the functionality of a students without appointments mode. The filter has a sub-filter that allows users to find students without appointments (or with a certain number of appointments) within a timeframe, Care Unit, Student Service, or Location.
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.

Current List of all 25 Reports

Report	Category
Alerts Report	Intervention Reports
Appointment Campaigns Report	Appointment/Visits Reports
Appointment Feedback Metrics	Appointment Questions
Appointment Feedback Responses	Appointment Questions
Appointment Requests Report	Appointment/Visits Reports
Appointment Summaries Report	Appointment/Visits Reports
Appointments Report	Appointment/Visits Reports
Attendance Report	Student Data Reports
Automations Report	Automations
Availabilities Report	Staff Reports
Cases Report	Intervention Reports
Check-Ins Report	Appointment/Visits Reports
Enrollment Census Report	Intervention Reports
Event RSVPs Report	Event Campaigns
Events Report	Event Campaigns
Journeys Report	Smart Guidance Reports
LMS Assignments Report	Student Data Reports
Notes Report	Student Data Reports
Progress Report Campaigns Report	Intervention Reports
Progress Reports Report	Intervention Reports
Students Enrollments Report	Student Data Reports
Students Report	Student Data Reports
Study Hall Report	Student Data Reports
Survey Campaign Report	Smart Guidance Reports
Survey Report	Smart Guidance Reports

Current List of all 25 Reports Organized by Category

Report	Category
Appointment Feedback Metrics	Appointment Questions
Appointment Feedback Responses	Appointment Questions
Appointment Campaigns Report	Appointment/Visits Reports
Appointment Requests Report	Appointment/Visits Reports
Appointment Summaries Report	Appointment/Visits Reports
Appointments Report	Appointment/Visits Reports
Check-Ins Report	Appointment/Visits Reports
Automations Report	Automations
Event RSVPs Report	Event Campaigns
Events Report	Event Campaigns
Alerts Report	Intervention Reports
Cases Report	Intervention Reports
Enrollment Census Report	Intervention Reports
Progress Report Campaigns Report	Intervention Reports
Progress Reports Report	Intervention Reports
Journeys Report	Smart Guidance Reports
Survey Campaign Report	Smart Guidance Reports
Survey Report	Smart Guidance Reports
Availabilities Report	Staff Reports
Attendance Report	Student Data Reports
LMS Assignments Report	Student Data Reports
Notes Report	Student Data Reports
Students Enrollments Report	Student Data Reports
Students Report	Student Data Reports
Study Hall Report	Student Data Reports

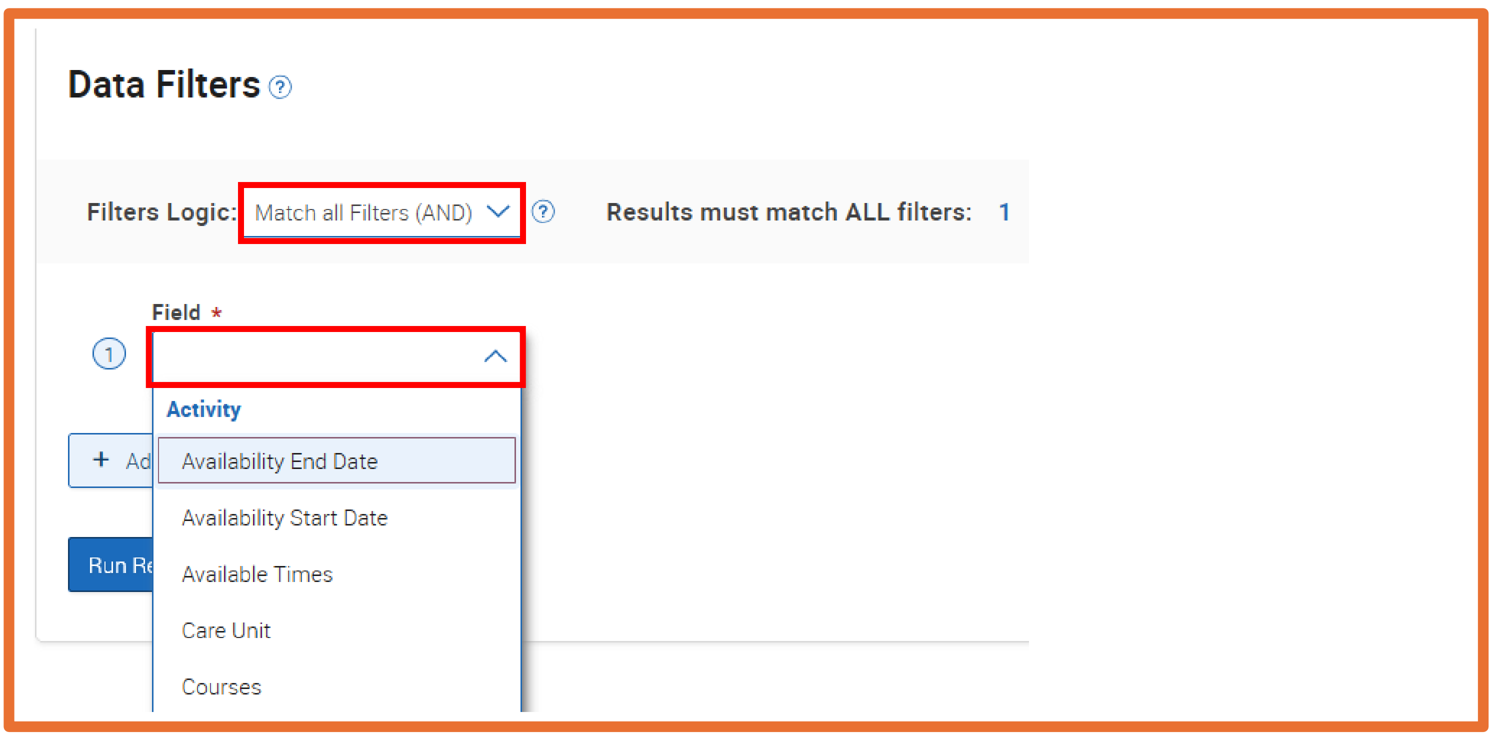
Building a Report

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**.
- Custom Attributes can be used as filters.
- 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.



This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 02/26/2025, Updated 01/02/2026]**

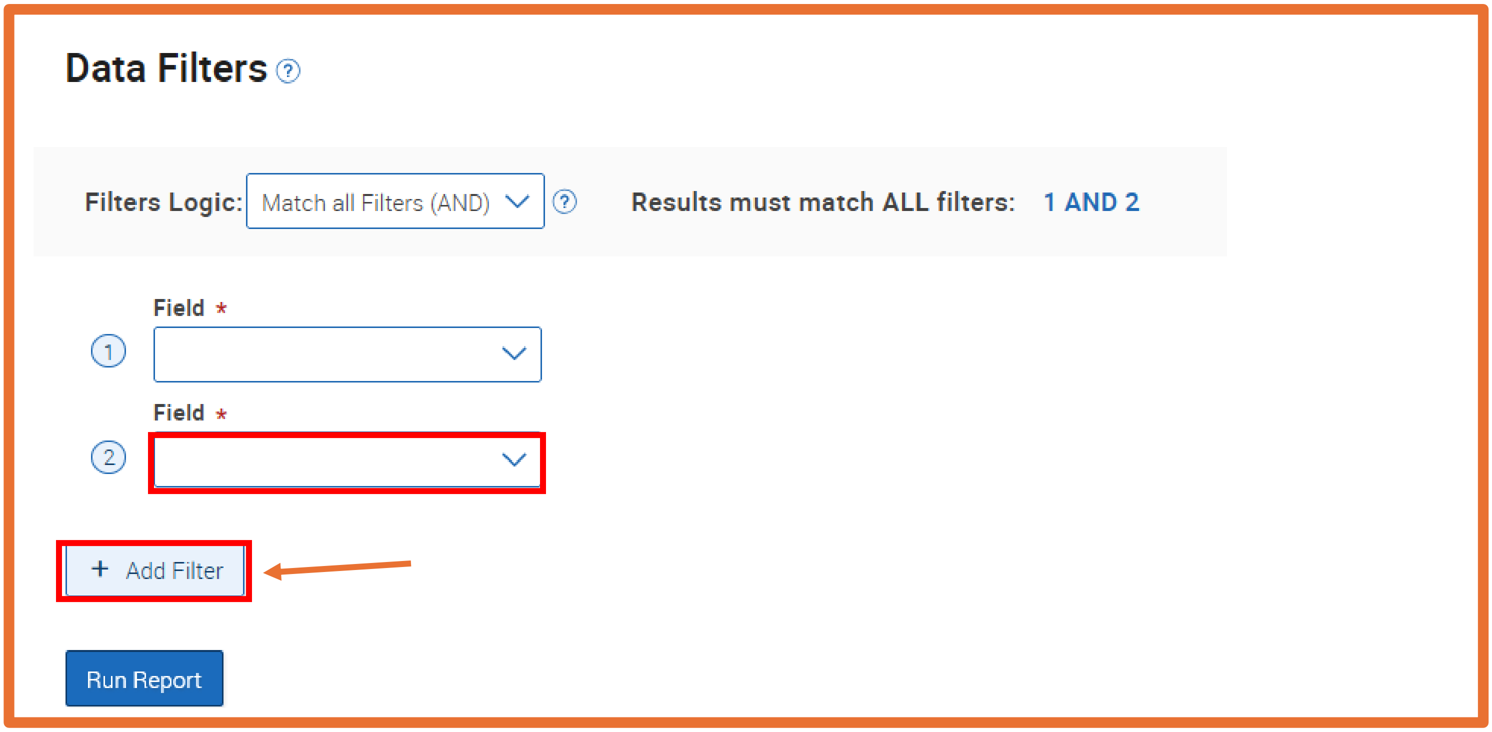
Filters Logic

Filters Logic options determine how your criteria are interpreted by the platform. By default, Navigate 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.



This document has been prepared by Bob Hudson, Assistant Director for Student Success Administrative Systems, Student Success & Retention **[Created 02/26/2025, Updated 01/02/2026]**