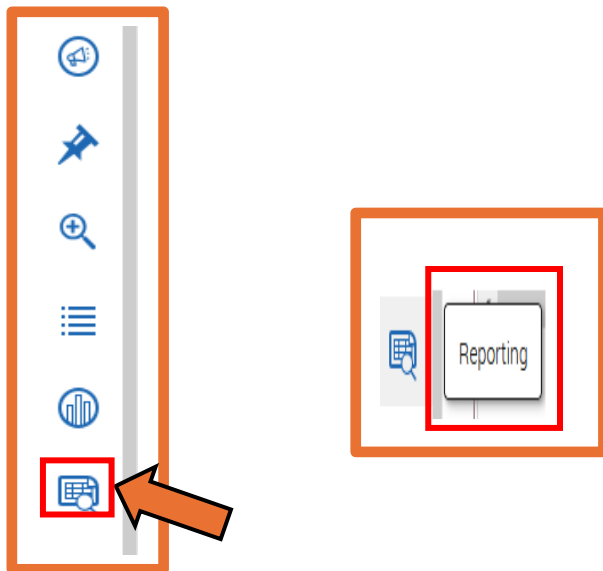


Navigate: Understanding Report Descriptions

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.

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.

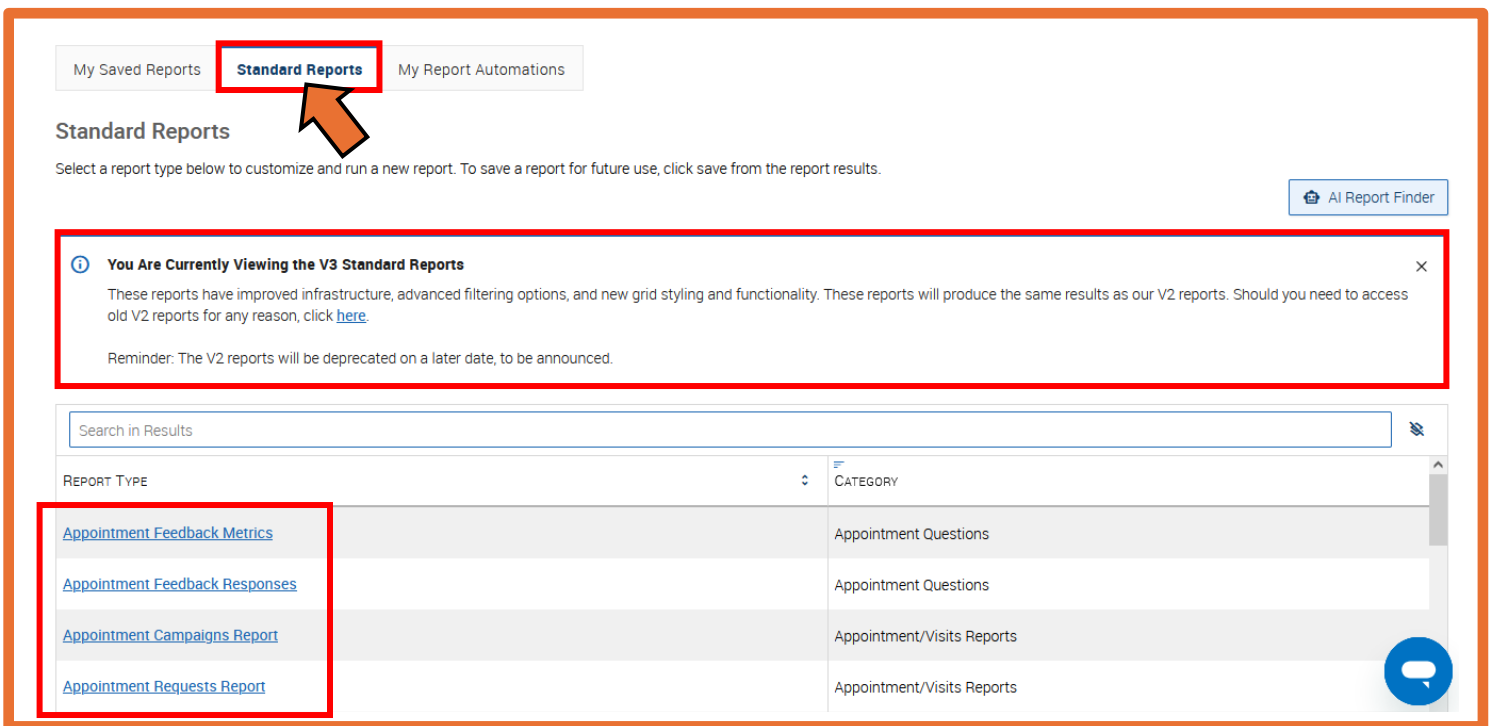


Reporting (**V3 Reports**) is a helpful tool for staff tasked with pulling reports and analytics related to student success programs. Your role must be given access to the reports. Each report has an individual permission for access.

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.

Navigate's **V3 Reports** have advanced filtering options and new grid styling and functionality. **Please Note: These V3 Reports will produce the same results as our previous reports, which are still accessible.**



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.

AI Report Finder

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.

Search in Results

| REPORT TYPE | CATEGORY |
|--|----------------------------|
| Appointment Feedback Metrics | Appointment Questions |
| Appointment Feedback Responses | Appointment Questions |
| Appointment Campaigns Report | Appointment/Visits Reports |
| Appointment Requests Report | Appointment/Visits Reports |

- 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 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 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. |
| Appointment Summaries 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. |

| Report Name | Report Description |
|---------------------------------|---|
| Check-Ins Report | The Check-Ins report shows <i>any</i> 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. |
| 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 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. To access the data, the user must have a role with access to a given Care Unit and the ability to view Event RSVPs within that Care Unit. |
| 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. To access the data, the user must have a role with access to a given Care Unit and the ability to view Event RSVPs within that Care Unit. |
| 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 | <p>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.</p> <p>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.</p> |
| Enrollment Census Report | <p>This report shows any Enrollment Census response created by a Navigate360 staff user.</p> <p>A single row represents a single Enrollment Census response instance with a created date in the date range chosen.</p> <p>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.</p> |

| Report Name | Report Description |
|---|--|
| Progress Report Campaigns Report | <p>This report shows all Progress Report campaign requests and response information.</p> <p>A single row represents a single Progress Report request per student created in the date range chosen.</p> |
| Progress Reports Report | <p>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.</p> |
| Survey Campaign Report | <p>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.</p> |
| Survey Report | <p>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.</p> |
| Availabilities Report | <p>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.</p> |
| Attendance Report | <p>This report shows any attendance entry created by a user in Navigate360.</p> <p>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.</p> |

| Report Name | Report Description |
|------------------------------------|--|
| Notes Report | <p>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.</p> |
| Students Enrollments Report | <p>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.</p> |
| Students Report | <p>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 platform.</p> <p>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.</p> <p>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.</p> |
| Study Hall Report | <p>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.</p> |