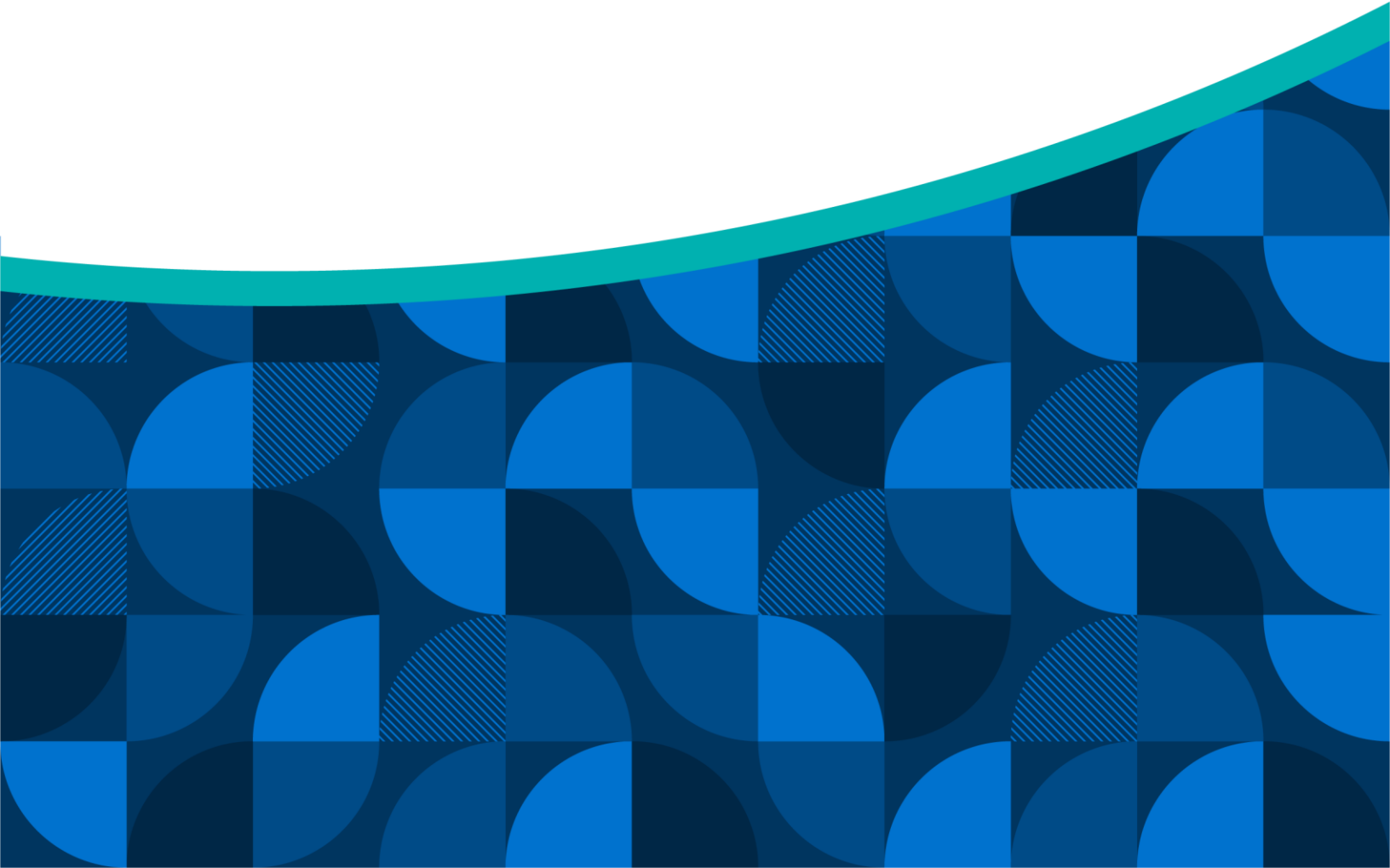




# **V3 Reports Starter Pack**



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# Introduction to the V3 Reports Starter Pack

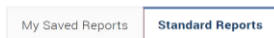
## How to Use V3 Reports

**V3 Reports** contain data and analytic insights related to student success programs.

Start in the Standard Reports tab to see an overview of the types of Reports you can pull. From there, start building your custom Reports using the data filters.

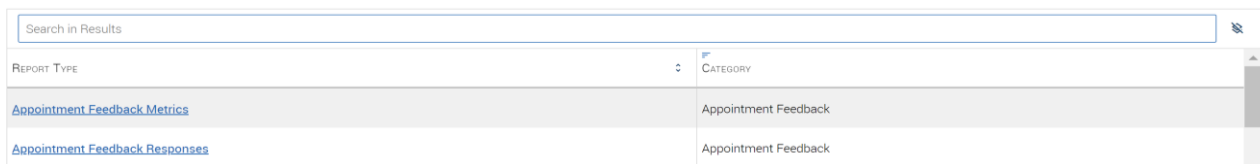
Once you have built a Report, save it to easily re-pull the Report with the same parameters in the future. You'll be able to find these in the *My Saved Reports* tab.

Share your saved Reports with others at your institution using the *Share These Filters* button within a Report.



### 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.

A screenshot of a table titled 'Standard Reports'. At the top is a search bar with the placeholder text 'Search in Results'. Below the search bar is a table with two columns: 'REPORT TYPE' and 'CATEGORY'. There are two rows of data. The first row has 'Appointment Feedback Metrics' under 'REPORT TYPE' and 'Appointment Feedback' under 'CATEGORY'. The second row has 'Appointment Feedback Responses' under 'REPORT TYPE' and 'Appointment Feedback' under 'CATEGORY'.

REPORT TYPE	CATEGORY
<a href="#">Appointment Feedback Metrics</a>	Appointment Feedback
<a href="#">Appointment Feedback Responses</a>	Appointment Feedback

## Sample Reports

There are many possible data points that you can pull from V3 Reports. To get you started, EAB has put together a list of commonly used Reports and the filters you would use to build each (see on subsequent pages)

## Need More?

**Looking to explore and build Reports beyond those shared here? Here are some Pro Tips to get started:**

- Start in your V2 Saved Reports and re-build and save those Reports using the V3 Reports infrastructure.
- Use a filter like "student first name is not empty" that is guaranteed to pull some data. That way, you can see the type of data that Report pulls which will spark ideas for use cases and further filter capabilities.

### Questions?

- View [this V3 Reports Help Center article](#) (you must be logged in to Navigate and the Help Center to use the link).
- Reach out to the Partner Support Team at [Navigate360TechSupport@eab.com](mailto:Navigate360TechSupport@eab.com).

# V3 Reports Starter Pack

## Examples – Student Data Reports

### Student Enrollments Report

- Students in Biology major that have not yet taken either CHEM 101 or Math 101 course.  
You can change *Major* and *Enrollment Course* value(s) to your selected value(s).

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

Field *	Condition	Value *
① Major	contains any	BIOLOGY
② Enrollment Course	does not contain any	CHEM-101   INTRO TO CHEMISTRY MATH-101   COLLEGE ALGEBRA

- Students who took BIO 101 and made an A.  
Purpose: Use Report results to recruit peer tutors/SI Leaders  
You can change *Courses* and *Final Grade* value(s) to your selected values(s).

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

Field *	In Terms	Condition	Value *
① Courses (Course Number)	Fall 2022 - Spring 2023	is	BIO-101   Intro to Biology
+ Add Sub-Filter			
Final Grade		contains any	A

- Students enrolled Fall 2023, not enrolled Spring 2024 in any of the Accounting, Finance or Marketing majors.  
You can change *Enrollment Term* and *Major* value(s) to your selected value(s).

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

Field *	Condition	Value *
① Enrollment Term	is	Fall 2023
② Term Credit Hours	In Term	Condition: exactly Value: 0
③ Major	contains any	ACCOUNTING FINANCE MARKETING

# V3 Reports Starter Pack

## Examples – Intervention Reports

### Progress Reports Report

- 'Excessive Absence' or 'Referral to Tutoring' Alerts submitted within the within the Fall '23 Week 4 Progress Reports Campaign' on Freshmen and Sophomores who earned between a C-F Midterm Grade  
You can change the *Alert Reasons*, *Grade*, and *Classification* value(s) to your selected values(s).

Filters Logic: Match all Filters (AND) ? Results must match ALL filters: 1 AND 2 AND 3 AND 4

Field *	Condition	Value *
1 Campaign Name	contains any	FALL '23 WEEK 4 PR CAMPAIGN
2 Alert Reasons	contains any	EXCESSIVE ABSENCES REFERRAL TO TUTORING
3 Midterm Grade	between	Low: F High: C
4 Classification	In Term	Condition: contains any Value: FRESHMAN SOPHOMORE

### Alerts Report

- All Positive Alerts issued across Spring 2023 Term  
You can change *Alert Create at Date* range and *Alert Type* value(s) to your selected value(s)

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

Field *	Condition	Start Date *	End Date *
1 Alert Created At Date	date range	01/01/2023	05/23/2023
2 Alert Type	contains any	Value: POSITIVE	

### Cases Report

- All cases with an 'Open' status that were created more than two weeks ago  
You can change *Opened at Date* value(s) to your selected values(s).

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

Field *	Condition	Date *
1 Opened At Date	before	09/22/2023
2 Status	is	Value: Open

- All cases with an 'Open' status that were created more than two weeks ago for students who either have less than 2.5 term GPA or are on Academic Probation (Advanced Logic – see red boxes in screenshot below)  
Purpose: To help with case management prioritization.

You can change the *Opened at Date*, *Term GPA*, *Categories* (or other student attribute) value(s) to your selected value(s).

Filters Logic: Advanced(AND/OR) ? Results must match custom filter logic: 1 AND 2 AND (3 OR 4) ?

1 Opened At Date	before	Date: 09/22/2023
2 Status	is	Value: Open
3 Term GPA	In Term	Condition: less than Value: 2.5
4 Categories	contains any	Value: ACADEMIC PROBATION (PROB)

# V3 Reports Starter Pack

## Examples – Appointment Visits/Reports

### Appointments Report

- All Advising Appointments scheduled so far in Fall 2023 term.  
You can change *Scheduled Start Date* range and *Care Unit* value(s) to your selected values(s).

Filters Logic: Match all Filters (AND) ?		Results must match ALL filters: 1 AND 2	
Field *	Condition	Date *	
① Scheduled Start Date x	since	08/22/2023	x
Field *	Condition	Value *	
② Care Unit x	contains any	ADVISING x	x

### Appointment Summary Reports Report

- Appointment Summary Reports created in Spring '23 within the Financial Aid Care Unit for students who receive Financial Aid  
You can change the *Care Unit*, *Date Range*, and *Student Group* value(s) to your selected values(s).

Filters Logic: Match all Filters (AND) ?		Results must match ALL filters: 1 AND 2 AND 3	
Field *	Condition	Start Date *	End Date *
① Appointment Created At Date x	date range	01/03/2023	05/23/2023
Field *	Condition	Value *	
② Care Unit x	contains any	FINANCIAL AID x	x
Field *	Condition	Value *	
③ Categories x	contains any	FINANCIAL AID (FINAID) x	x

# V3 Reports Starter Pack

## Examples – Smart Guidance Reports

### Journeys Report

- All students that have added a Journey themselves + which Journey(s) they have added

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

Field *	Condition	Value *
① Journey Assigned By	contains any	SELF

- All staff that have added a Journey(s) to a Student(s)

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

Field *	Condition	Value *
① Journey Assigned By	contains any	STAFF

- All students that have not completed a specific step in a specific Journey  
You can change the *Journey Name and Journey Step values(s)* to your selected values(s).

Filters Logic: Match all Filters (AND) ⓘ Results must match ALL filters: 1 AND 2 AND 3

Field *	Condition	Value *
① Journey Name	contains any	FIRST-YEAR STUDENT ORIENTATION
② Journey Step Name	exactly	Pick up your Student ID card
③ Journey Step Status	contains any	INCOMPLETE

- All students that have not completed all steps in a specific Journey(s)  
You can change the *Journey Name values(s)* to your selected values(s).

Filters Logic: Match all Filters (AND) ⓘ Results must match ALL filters: 1 AND 2

Field *	Condition	Value *
① Journey Name	contains any	AFFORDING COLLEGE
② Journey Status	contains any	INCOMPLETE

# V3 Reports Starter Pack

## Examples – Smart Guidance Reports

### Academic Plan Utilization Report

- All students that have planned items  
Include *ALL future terms* in your selected values

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

Field *	Condition	Value *
① Term	contains any	FALL 2026 X SPRING 2026 X FALL 2027 X SPRING 2027 X FALL 2028 X FALL 2029 X SPRING 2029 X FALL 2030 X SPRING 2030 X

- All students that have planned items, but not registered  
You can change *Term* value to the next upcoming term (term that students are currently registering for)

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

Field *	Condition	Value *
① Term	contains any	FALL 2025 X
② Section Name	is empty	

- All students that are using Navigate360 to register for courses.

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

Field *	Condition	Value *
① Registered in Navigate360	is	True

### Student Compliance to Advisor Plan Report

- All staff that have sent plans to students within a selected date range.  
➤ You can change the *Sent Date values(s)* to your selected values(s).

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

Field *	Condition	Date *
① Sent Date	since	09/02/2024



# V3 Reports Starter Pack

## Examples – Operations Reports, Staff Reports

### Course Section Capacity report

- All Course Section Capacity details in an upcoming term  
You can change the *Term Name* value to your selected value.

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

Field *	Condition	Value *
① Term Name x	contains any	SPRING 2025 x

- All Course Sections in a given term where seat demand is greater than seats available.  
You can change the *Timeframe*, *Care Unit*, and *Course* value(s) to your selected values(s).

Filters Logic: Match all Filters (AND) ⓘ Results must match ALL filters: 1 AND 2

Field *	Condition	Value *
① Term Name x	contains any	FALL 2024 x
② Seats Available x	less than	0

### Availabilities Report

- All Chemistry Department Tutoring Availability across the Fall 2023 Term  
You can change the *Timeframe*, *Care Unit*, and *Course* value(s) to your selected values(s).

Filters Logic: Match all Filters (AND) ⓘ Results must match ALL filters: 1 AND 2 AND 3

Field *	Condition	Value *
① Care Unit x	contains any	TUTORING x
② Timeframe x	date range	Start Date: 08/22/2023 End Date: 12/19/2023
③ Courses x	contains any	CHEM-101   INTRO TO CHEMISTRY x CHEM-302   ORGANIC CHEMISTRY PART 1 x BIO-250   BIOCHEMISTRY x