

Navigate360: Notification or Referral Reports – V3 Reporting

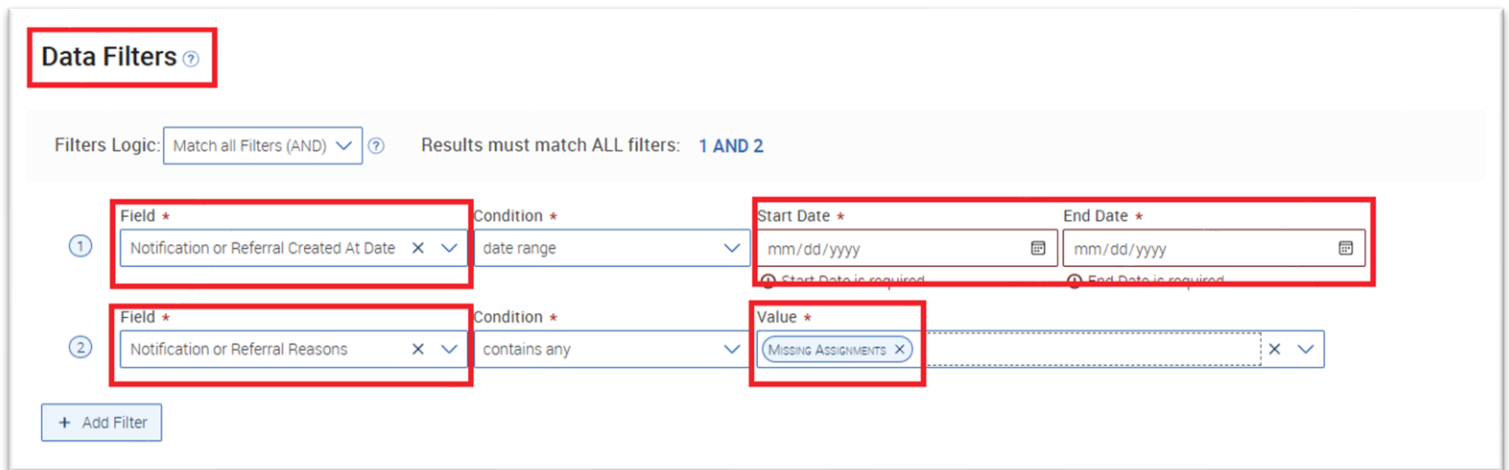
For running reports of students marked at-risk by faculty or other staff during a specified timeframe.

1. Open the Alerts report

- Click the *Reporting*  icon from the left navigation
- Click on the *Standard Reports* tab
- Click the *Notification or Referrals Report*



2. Input Data Filters

- Under *Field*, select *Notification or Referral Created At Date* from the drop-down menu.
- The *Condition* is *Date Range*.
- In the *Start Date* box, select *the Monday of Week 3* for the term, from the pop-up calendar.
- In the *End Date* box, select *the Monday of Week 6* for the term, from the pop-up calendar.
- Click *+Add Filter*.
- Under *Field*, select *Notification or Referral Reasons* from the drop-down menu.
- The *Condition* is *Contains Any*.
- Select *Missing Assignments* from the *Value* drop-down menu.



Data Filters ?

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

	Field *	Condition *	Start Date *	End Date *
1	Notification or Referral Created At Date x v	date range v	mm/dd/yyyy 	mm/dd/yyyy 
			<small>Start Date is required</small>	<small>End Date is required</small>
2	Notification or Referral Reasons x v	contains any v	Value *	
			Missing Assignments x v	

+ Add Filter

ADDITIONAL/OPTIONAL FILTERS:

- To filter by major:
 - Click *+Add Filter*
 - Under *Field*, select *Major*.
 - The *Condition* is *Contains Any*.
 - In the *Value* box, type or select the major(s) advised and select from the drop-down menu.
- To filter by assigned advisor:
 - Click *+Add Filter*.
 - Under *Field*, select *Relationship Type (then choose Assigned To)*.
 - The *Condition* is *Is*.
 - In the *Value* box, select *Academic Advisor* from the drop-down menu.
 - Click *+Add Sub-Filter*
 - Under *Field*, select *Assigned Staff*.
 - The *Condition* is *Contains Any*.


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- In the *Value* box, type or select the advisor's name and select from the drop-down menu.
- Click *Run Report* at the bottom of the page.

3. Export the report

- When a list of students is generated, click *the hamburger menu*  to the right of the search result box.
- Click *Export*.
- A pop-up will appear in the bottom right of the screen when the export is ready. In that pop-up box, click *Download Center for Reports*.
- Click the name of the file to download. It will download to the location you have set in your browser.
- Delete the columns of the report you do not need

