

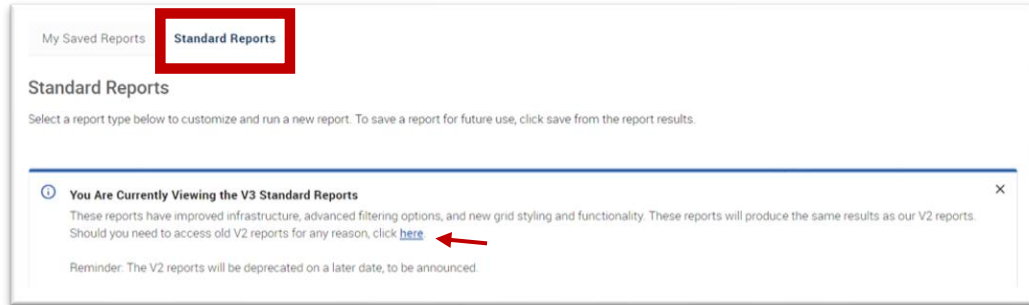


Navigate360: Configuring a Schedule for Saved Reports

Searches from reports or the advanced search can be saved and automatically re-run without re-entering filters. After saving a report, users can configure a schedule for the report to run automatically and send updates to their Outlook.

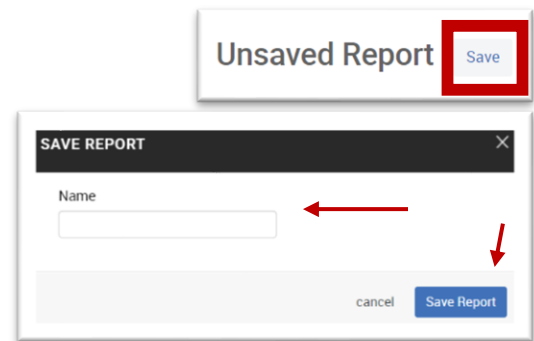
1. Run the desired report or search

- To run a report, click the **Reporting**  icon from the left navigation.
- From reporting screen, click the **Standard Reports** tab to revert to V2 reports
- Click [here](#) to revert to V2 reporting
- The V2 Reports page will load
- Select a report, apply the desired filters, and click **Search** at the bottom of the page.
- To run an advanced search, click the **Advanced Search**  icon from the left navigation. Apply the desired filters, and click **Search** at the bottom of the page




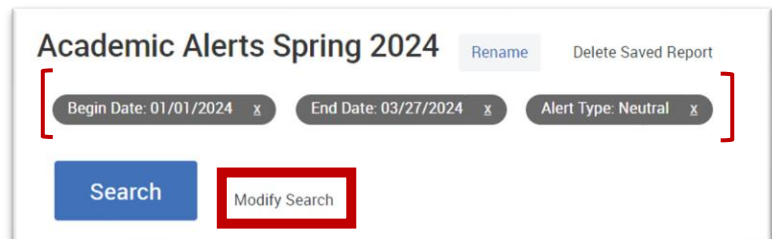
2. Save the report or search

- Once results have been generated, click **Save** next to **Unsaved Report** at the top of the page
- A **Save Report** dialogue box will appear. Under **Name** type a specific name for the report. If this report is associated with a specific campaign, consider naming the report to match the campaign including user initials
Example: *Academic Alerts Spring 2024 RDS*
- Click **Save Report**



3. Access and re-run the saved report or search

- Click the **Lists & Saved Items**  icon from the left navigation
- Scroll down the page to **Saved Searches** to re-run a saved **Advanced Search**
- Scroll down the page to **Saved Reports** to re-run a saved **Report**
- Click the title of the report to be re-run. The page will reroute to the selected **Advanced Search** or **Report** and run the search or report based on the previously input filters. Any new results from the previous time the report was run will appear
- Check the set filters at the top of the page and click **Modify Search** to add or delete filters



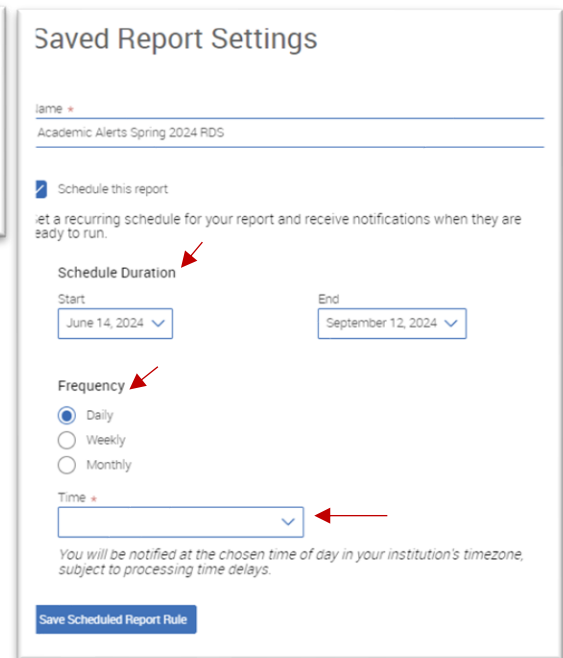
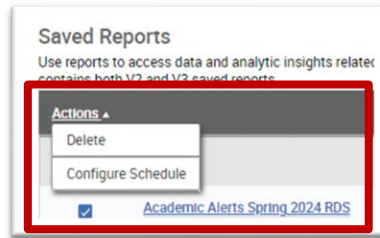
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Searches from reports or the advanced search can be saved and automatically re-run without re-entering filters. After saving a report, users can configure a schedule for the report to run automatically and send updates to their Outlook.

4. Configure a schedule for saved report

- Click the *Lists & Saved Items* icon from the left navigation
- Scroll down the page to *Saved Reports* to configure a schedule
- Click the box next to the title of the report to configure and select *Actions*
- Click *Configure Schedule*
- Schedule the *Duration* of the recurring schedule for the report
- Select the *Frequency* to receive scheduled report update: *Daily*, *Weekly*, or *Monthly*
- Select the *Time* to receive scheduled report update
- Click *Save Scheduled Report Rule*, report will come to user's Outlook based on configured schedule

A screenshot of the 'Saved Report Settings' configuration page. The title is 'Saved Report Settings' and the report name is 'Academic Alerts Spring 2024 RDS'. There is a section 'Schedule this report' with a sub-section 'Let a recurring schedule for your report and receive notifications when they are ready to run.' Below this, there are two columns: 'Schedule Duration' with 'Start' (June 14, 2024) and 'End' (September 12, 2024) dropdowns. Below that is 'Frequency' with radio buttons for 'Daily' (selected), 'Weekly', and 'Monthly'. Below that is 'Time' with a dropdown menu. A red arrow points to the 'Time' dropdown. At the bottom, there is a blue button labeled 'Save Scheduled Report Rule'. A note at the bottom says 'You will be notified at the chosen time of day in your institution's timezone, subject to processing time delays.'