
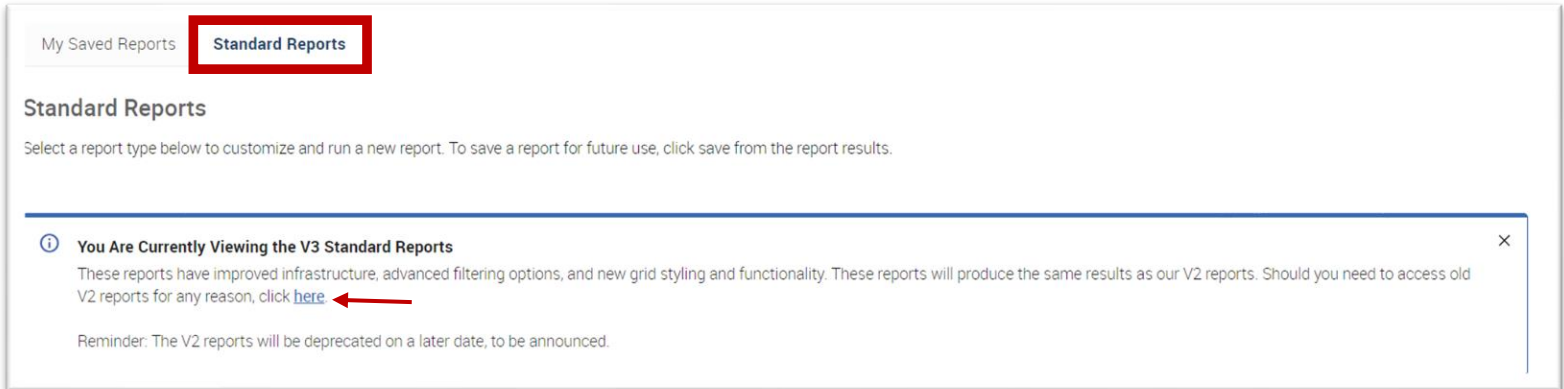


Navigate360: Generating Reports

For running reports which are term bound to the current term

1. Open Reporting pages and revert to V2

- Click the *Reporting*  icon from the left Navigation
- Click the *Standard Reports* tab
- Click *here* to revert to V2 reporting



My Saved Reports **Standard Reports**

Standard Reports

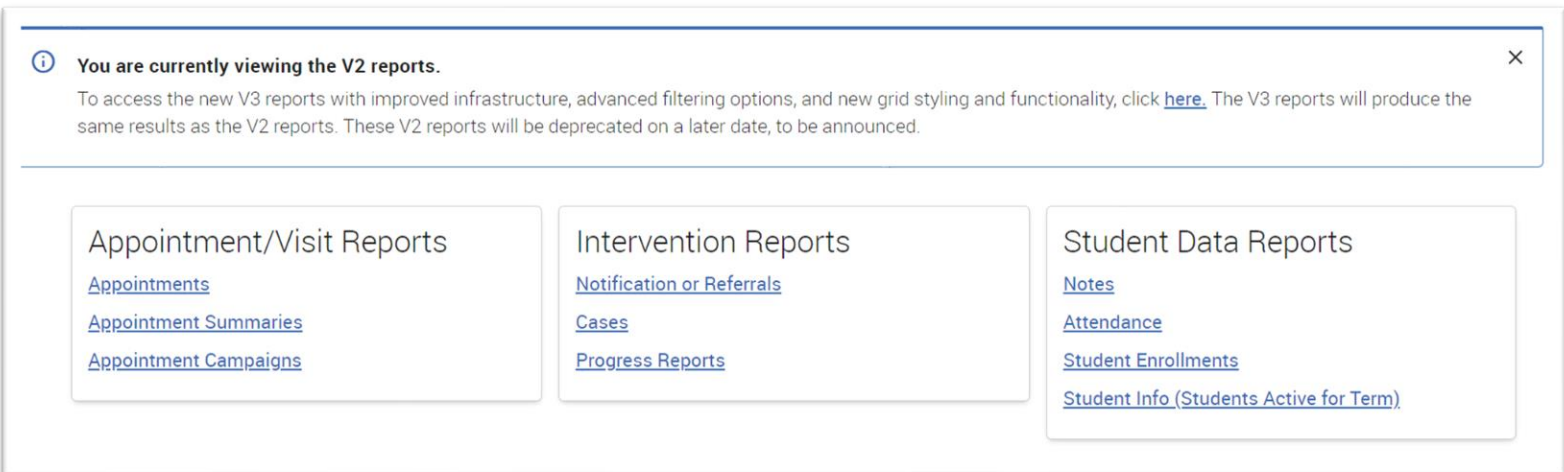
Select a report type below to customize and run a new report. To save a report for future use, click save from the report results.

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.

- The V2 Reports page will load




You are currently viewing the V2 reports.

To access the new V3 reports with improved infrastructure, advanced filtering options, and new grid styling and functionality, click [here](#). The V3 reports will produce the same results as the V2 reports. These V2 reports will be deprecated on a later date, to be announced.

Appointment/Visit Reports Appointments Appointment Summaries Appointment Campaigns	Intervention Reports Notification or Referrals Cases Progress Reports	Student Data Reports Notes Attendance Student Enrollments Student Info (Students Active for Term)
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2. Select a report to run

- Click the *Reporting*  icon from the left navigation
- For staff with the 'Advisor' Role in the system, a *Reports* page will load with three boxes containing links to reports (shown above)
 - *Appointment/Visit Reports*: for users who use Navigate to schedule appointments with students and report on those appointments.
 - *Intervention Reports*: for users who manage cases which are assigned to them or their unit.
 - *Student Data Reports*: for users who have a general need to generate reports on populations of students.
- Click on the desired report to run. Recommendations:
 - *Student Info (Students Active for Term)*: This is the most common report and will run a list of students who fall into the parameters set.

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- **Student Enrollments:** Will run a course listing for each of the students who fall into the parameters set.

3. Add additional student filters

- Click to expand the filter categories after clicking on the report that you want to create: *Student Information, Enrollment History, Area of Study, Term Data, Performance Data, Course Data, Assigned To,* and/or *Success Indicators*.
- Search for information about a specific, known set of students, or create a search which finds students within a set of criteria:
 - If the E Numbers for a specific set of students is known, copy and paste the list of E Numbers into *Student ID* under the *Student Information* filter. E Numbers may be separated by a space which the system will do automatically if pasted from an excel or word document list. The E Numbers do **NOT** need to be separated by a comma.

The screenshot shows the 'Student Filters' interface. The 'Student Information' section is expanded, showing various filter fields. The 'Student ID' field is highlighted with a red box, and a red arrow points to the 'Student Information' header.

First Name?	Last Name?	From Last Name?	To Last Name?	Student ID?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender All	Race or Ethnicity All	Preferred Name?	Student List (In Any of These) All	
Transfer Student Any				
E-mail(s)	Category (In Any of these)? All			
Tag (In Any of these)? All				

- If the E Numbers are not known, apply filters to narrow the search for students who fit various criteria.
- Check the boxes next to *Include Inactive* to include students who are inactive for the, if desired.
- Once filters have been input, click *Search* at the bottom of the *Reports* page.

The screenshot shows the search controls. A blue 'Search' button is on the left. To its right are two checkboxes: 'Include Inactive' and 'My Students Only'.


NOTE:

- Some filters require that the user begins typing the first few letters prior to making a recommendation for what to enter. Some filters provide a list of the only options in a drop-down menu.
- Under *Student Information, Category* refers to an attribute which is coded in Banner. To search by Banner attribute, by typing the name of the attribute into the *Category* box. Not all attributes will generate a student list. Please work with the Navigate Administrator to have the attribute added.
- The expand button will provide 'ANDing' and 'ORing' abilities – the ability to include or exclude some or all of students with particular traits.

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4. Export the result

- When a list of students is generated, click [Actions](#) at the top of the search result box.
- From the drop-down menu, click [Export Results](#).
- In the [Export Results Column](#) window that appears, use the checkboxes to select the columns for the export.
- 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.
- The download center can also be accessed by clicking [Download Center for reports](#) under [Quick Links](#) on the staff homepage. To return to the homepage click the Home icon in the left navigation menu.
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