NAVIGATE U

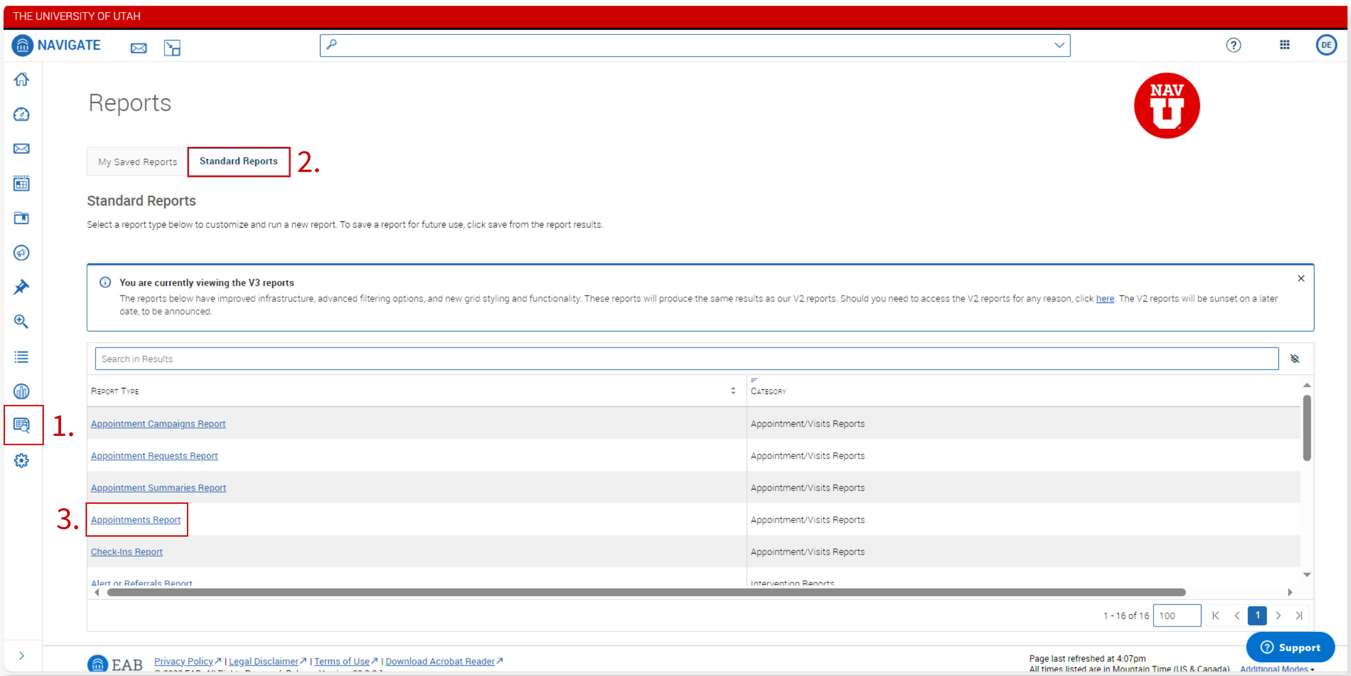
Staff and Faculty Guide

Reports

Reports

Reports contain data and analytic insights related to student success programs. Reporting is a helpful tool for staff tasked with pulling reports and analytics related to student success programs.

Selecting a Report to Run

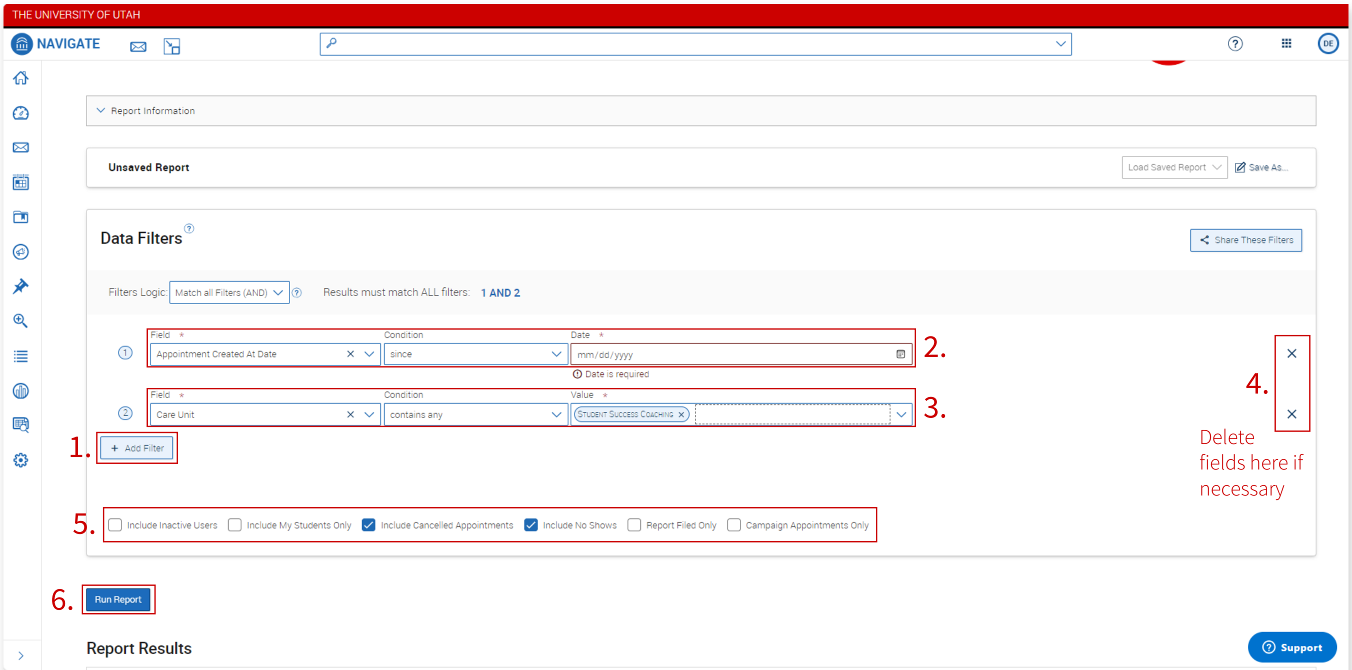


1. To get started with **Reports**, navigate to the icon highlighted on the left-hand **navbar**

2. The first page that you encounter will show you reports that you've already run before, but since this is the first report we're making, we'll navigate to **Standard Reports**

3. Finally, we'll choose our desired report; for this example, the **Appointments Report**

Filtering the Campaign



Next, we will define how we want to filter the campaign. In this example, I want to see the appointments scheduled with the Student Success Coaching Care Unit since Sept 20th.

1. Step 1 in the screenshot below shows where to add our desired filters.

2. Step 2 shows the filter for Appointment Creation. The **Condition** of the filter is changeable via drop-down menu options, and we are interested in "since" a certain date.

3. Step 3 shows how to filter for the Student Success Coaching **Care Unit** in much the same way as the aforementioned filter.

4. If I want to **delete** a filter, step 4 shows how.

5. Highlight number 5 shows an assortment of other options, including if I want to see only the appointments my assigned students have made with me (**Include My Students Only**) or whether to include cancellations.

6. Hit **Run Report**