

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

The screenshot shows the NAVIGATE Reports interface. The top navigation bar includes the University of Utah logo and the word "NAVIGATE". The main content area is titled "Reports" and features a "Standard Reports" tab, which is highlighted with a red box and a "2." annotation. Below the tab, there is a "Standard Reports" section with a sub-header "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 notification banner states: "You are currently viewing the V3 reports. The reports below 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 the V2 reports for any reason, click here. The V2 reports will be sunset on a later date, to be announced." Below the notification is a search bar and a table of reports. The table has two columns: "REPORT TYPE" and "Category". The "Appointment Campaigns Report" is highlighted with a red box and a "1." annotation. The "Appointments Report" is highlighted with a red box and a "3." annotation. The footer of the page includes "EAB", "Privacy Policy", "Legal Disclaimer", "Terms of Use", "Download Acrobat Reader", and "Support".

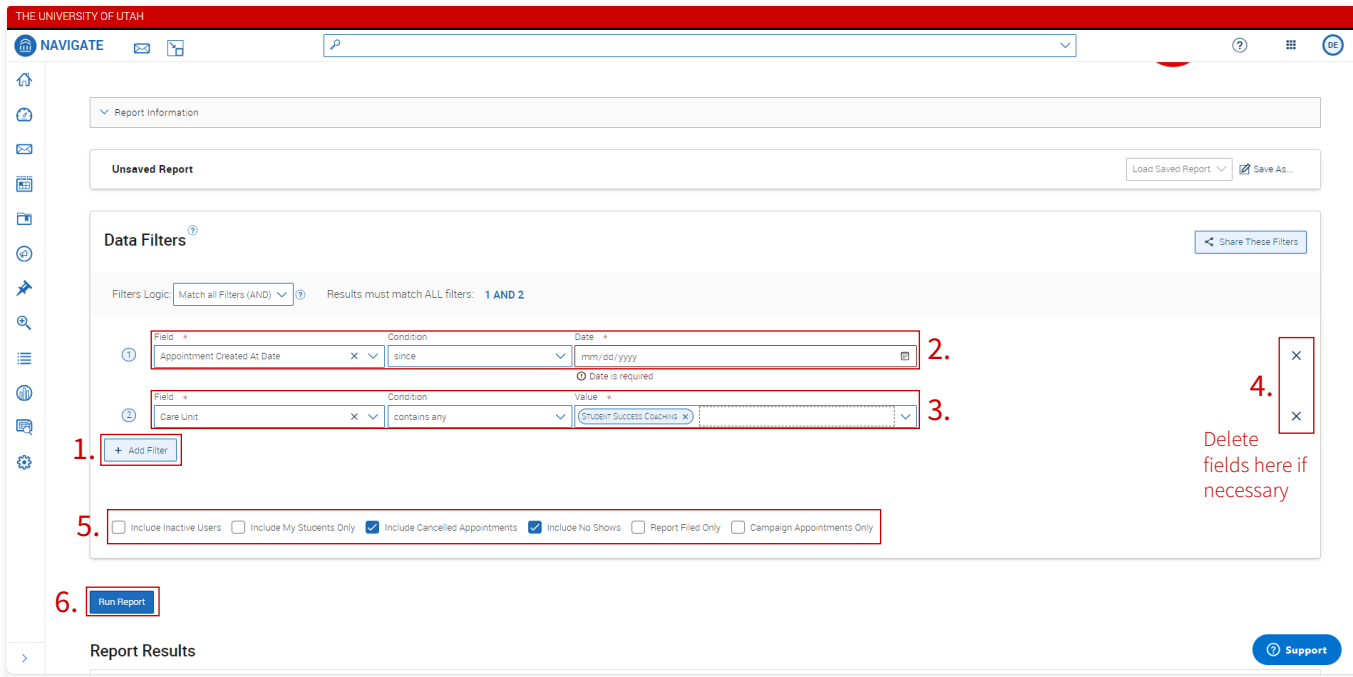
REPORT TYPE	Category
Appointment Campaigns Report	Appointment/Visits Reports
Appointment Requests Report	Appointment/Visits Reports
Appointment Summaries Report	Appointment/Visits Reports
Appointments Report	Appointment/Visits Reports
Check-ins Report	Appointment/Visits Reports
Alert or Referrals Banner	Interaction Banner

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

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

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**

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**