Reports in Navigate

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Feature Overview

As a single source of consolidated data points, Navigate creates a unified analytics platform which links numerous campus stakeholders around student success challenges. We use best practice data insights so your college can make informed decisions around student intervention strategies, such as improving student interactions and maximizing faculty and staff workflow.

Report List and Descriptions

There are 18 reports in Navigate Reports: Appointment Summaries, Appointments, Appointment Campaigns, Availabilities, Appointment Requests, Check Ins, Alerts, Cases, Student Info, Assignment, Notes, Attendance, Students Enrollments, Enrollment Census, Progress Reports, Progress Report Campaigns, Study Hall, and Calendar Stats. Detailed information about each column in each report is in the Data Dictionary articles on the Help Center and the reports themselves. They are also included in the index attached to this article.

The rest of this article section explains the 18 reports in detail. They serve as an example of the information each report contains. Click the name of a report above to go to information about the report.

Appointments Report

This report shows any appointment created by a user in Navigate. A single row in the Appointments Report represents a single appointment instance with the Appointment Date within the date range chosen. If the appointment instance is a group appointment, you see a single row per student in the appointment. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any appointments in the date range chosen.

The data in the Appointments report is Care Unit-specific. To view and access the data, users must have a role with access to a given Care Unit and the ability to view appointments within that Care Unit. They also need the **View Appointments Report** permission to see the link to the report.

View the Appointments Report Data Fields article here.

Appointment Summaries Report

This report shows any Appointment Summary created by a user within the platform.

Note. An appointment can be either a scheduled or drop-in interaction with a student.

A single row in the report represents a single Appointment Summary with a Created Date in the date range chosen. If the Appointment Summary was created for multiple students, you find one row per student with the summary report data. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any appointment summaries in the date range chosen.

The data returned in the Appointment Summaries report is Care Unit-specific. To access the report's data, users must have a role with access to a given Care Unit and the ability to view Appointment Summaries within that Care Unit. They also need the **View Appointment Summaries Report** permission.

View the Appointment Summary Report Data Fields article here.

Appointment Campaigns Report

This report shows all Appointment Campaign requests and response information for a Care Unit. A single row represents a single appointment campaign request per student.

To use this report, you need access to view Appointment Campaigns for the respective Care Unit as well as access to the report to see the report and its results.

View the Appointment Campaign Report Data Fields article here.

Appointment Requests Report

This report shows any appointment request created by a user in Navigate. A single row in the report represents a single appointment request within the date range chosen. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any appointment requests in the date range chosen.

The Appointments Report has two report modes. The report modes are *Appointments* and *Students Without Appointments*. In *Appointments* mode, the results show one row per appointment per student. In *Students Without Appointments* mode, the results show one row per student.

To use this report, a user needs the **View and Delete Appointment Requests for Other Users** (per Care Unit) and **View Appointment Requests Report** permissions.

View the Appointment Request Reports Data Fields article here.

Check-Ins Report

The Check-Ins report shows *any* check-in for a visit in Navigate. This includes appointments, track time, and record visit check-ins. A single row represents a single check-in within the date range chosen. This includes Appointments, Track Time, and Record Visit check-ins. If you have selected an enrollment term or terms, the student must be active in the terms selected to be returned in the results. Otherwise, the report retrieves all students active in any term with a check-in the selected date range.

To use this report, a user needs the **View Check-in Report** and **View Students Checked-In/Out** permissions.

View the Check-Ins Report Data Fields article here.

Alerts Report

The Alerts report includes any user-created alert associated with the Navigate platform, along with associated details. This covers alerts created by campaigns or ad-hoc alerts. A single row represents a single alert instance within the selected date range. If you filter by enrollment terms, only students active in the terms return in the report results. If you do not filter by enrollment terms, you retrieve all students active in any term with any Alert instances in the date range chosen.

To use this report, a user needs the **View Alerts Report** permission.

View the Alerts Report Data Fields Article here.

Cases Report

This report shows any Case created by a Navigate user and the associated details. The Cases report allows you to learn about open or closed cases at your institution, including who opened the case, who is assigned to the case, and the Case Closed Reason.

A single row represents a single Case instance in the date range. If you have selected an enrollment term or terms, the student must be active in the terms selected, otherwise the report pulls all students active in any term with a case in the selected date range.

The data returned in the report is Care Unit-specific. To access the report's data, the user must have a role with access to a given Care Unit and the ability to view cases within that Care Unit. The user also needs the **View Cases Report** permission.

View the Cases Report Data Fields article here.

Progress Reports Report

This report shows any Progress Reports and Progress Report responses created by a user within the platform.

A single row represents a single Progress Report instance with a created date in the date range chosen. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you will retrieve all students active in any term with any Progress Reports in the date range chosen.

To view this report, users need the **View Progress Reports Report** and **View Progress Reports on Students** permissions.

View the Progress Reports Report Data Fields article here.

Progress Report Campaigns Report

This report shows all Progress Report campaign requests and response information.

A single row represents a single Progress Report request per student created in the date range chosen.

To view this report, users need the **View Progress Report Campaigns Report** and **View Progress Reports on Students** permissions.

View the Progress Report Campaign Report Data Fields article here.

Enrollment Census Campaigns Report

This report shows any Enrollment Census response created by a Navigate staff user.

A single row represents a single Enrollment Census response instance with a created date in the date range chosen.

For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you will retrieve all students active in any term with any Enrollment Census responses in the date range chosen.

To view this report, users need the **View Enrollment Census Report** permission.

View the Enrollment Census Campaigns Report Data Fields article here.

Notes Report

This report shows any Note created by a Navigate user in the platform. The Notes report allows partners to see how information outside appointments is being recorded by staff who have access to Navigate.

A single row represents a single Note with a created date within the selected date range. If the Note was created for multiple students, you find one row per student with the Note data.

For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you will retrieve all students active in any term with any notes in the date range chosen.

To access this report, users need the **View Notes Report** permission.

View the Notes Report Data Fields article here.

Assignments Report

This report shows any assignment for a course created by a user within the platform. A single row represents a single assignment that has a due date within the date range chosen. If the assignment was created for multiple students, you find one row per student with the Summary Report data. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any assignments in the date range chosen.

To view data within this report, the user must have the **View Cases** permission within a given Care Unit. They also need the **View Assignments Report** permission.

View the Assignments Report Data Fields article here.

Attendance Report

This report shows any attendance entry created by a user in Navigate.

A single row represents a single attendance entry with a created date in the selected date range. If the attendance entry was created for multiple students, you find one row per student with the attendance data. For a student to be returned in the report, the student must be active in the terms selected. If no terms are selected, you retrieve all students active in any term with any attendance entry in the date range chosen.

To access this report, users need the **View Attendances Report** permission.

View the Attendance Report Data Fields article here.

Study Hall Report

This report shows any study hall check-ins and hours created by a user within the platform. A single row represents a single student with a check-in for study hall in the chosen term. For a student to be returned in the report, the student must be active in the selected term.

To view this report, users need the **View Study Hall Report** permission.

View the Study Hall Report Data Fields article here.

Student Enrollments Report

This report shows any course enrollments a student has in the selected term. A single row represents a single enrollment instance within the selected term. Users find one row per student course enrollment with the associated data. This means if a student is enrolled in five classes, you see five lines for that particular student. For a student to be returned in the report, the student must be active in the selected term.

To view this report, users needs the **View Enrollments Report** permission**.**

This report includes one row for every currently or previously enrolled course per student.

View the Student Enrollments Report Data Fields article here.

Student Info Report

This report shows general information for students in Navigate. It also shows if the student can receive SMS communications from the Navigate short-code or a telephone number from the pool. A single row represents a single student in the Navigate platform.

To use this report, a user needs the **View Student Info Report** permission.

This report can be used to confirm that student data is coming into the system properly.

View the Student Info Report Data Fields article here.

Availabilities Report

This report shows any appointment, campaign, or drop-in availability created in the platform. These can be "forever" availabilities or availabilities for a defined date range.

> **Note.** For an Availability to show up in the report, the Availability must have overlap with any date within the date range. For example, if the date range is March 1st to March 31st and an Availability runs February 15th to March 1st, it appears in the report. This is different than our previous filtering.

Users with certain permissions can use this report to create and edit Availability for other users. To create Availabilities, users need that permission. To edit Availabilities using this report, the user needs access to edit Availabilities within a given Care Unit.

Users also need the **View Availabilities Report** permission to see the report and/or create and edit Availabilities.

A single row in this report represents a single availability instance within the date range chosen.
The *Active* field shows whether the availability is active or inactive on the day that you run this report.

> **Note.** When using *Export to Excel*, the export contains one line per availability set by the staff. As a result, some staff members and courses are listed many times. This allows for better data manipulation within Excel.

The Availabilities report allows you to learn who or how many staff are available for particular Services, Care Units, Locations, or courses.

View the Availabilities Report Data Fields article [here](#).

Calendar Statistics Report

This report shows staff Outlook and OAuth calendar sync status, NOT calendar sync status in general. No Google Calendar statistics are included in this report. A single row represents a single staff user and the status of their Outlook/OAuth calendar sync. It was introduced with the Navigate Strategic Care 19.1.1 release to allows institutions to track sync status in advance of Microsoft deprecating Service Accounts.

To view this report, users need the **View Calendar Stats Report** permission.

View the Calendar Statistics Report Data Fields article [here](#).

Generating a Report

While all reports have different purposes and somewhat different fields, the process to generate a report is the same.

To Generate a Report:

1. Open Reports by clicking the icon in the sidebar.
2. Select a report from the list on the main screen and click on its title. Note that you only see Reports you have permissions to use.
3. Set the Activity filters. This is typically a date range and conditions on the entire data set, like *Include Enrolled Students Only* or *Care Unit*.
4. Set the Student filters. These filters parallel the filters in the Advanced Search; see the Advanced Search article for more information about these filters.
5. Set any final conditions (e.g. the *Include Inactive* checkbox) and click **Search** to generate.

Report Actions

Users can take action on any report by opening the **Actions** menu in the report results. Below is an example of the Actions menu for the Appointments report.

While most reports have some unique actions, all reports have some similar actions. Unique actions are listed in the Data Dictionary article for the report.

The actions that every report has are listed below.

- **Send a Message**
  - Sends a message to the students selected by email or text.
- **Tag**
  - Adds a tag to the students selected.
- **Note**
  - Adds a note to the students selected.
- **Add Ad-hoc Appointment Summary**
  - Opens an Appointment Summary Report for the students selected.
- **Appointment Campaign**
  - Creates an Appointment Campaign using the selected students.
- **Schedule Appointment**
  - Creates an Appointment between the students and the person who ran the report.
- **Add to Student List**
  - Adds the selected students to a Student List.
- **Show/Hide Columns**
  - Lets the user choose the columns to show in the report results and export.
- **Export Results**
  - Exports the report results to a CSV file. If you have hidden columns, the export maintains those choices.

Report Export

Important. In an effort to minimize requirements for certain versions of Excel or other possible issues, all exports in these new reports are in CSV format. This standardizes the export and allows any version of Excel to open the file.

All reports can be exported.

To export, generate a report. Select **Export Results** from the **Actions** menu after taking any other actions (e.g., showing/hiding columns) you want to do before creating an export file.

The CSV file downloads.

We removed all rows from the top of the file that produced the school name, date ranges, and other added information. The information remains at the top of the file; however, it is stored only in the first line.

Note. Only the first 32000 characters of a Note show in the report or CSV. This applies to the **Notes Report** only and is due to Excel limitations. To see the full note, go to the Student Profile.