

Navigate: Advanced Search, Watch Lists, Saved Searches, and Reporting

Knowing the Difference

1. Advanced Search:

Advanced Search uses different logic statements to build queries. Most search filters create AND statements. As you build a search by laying on various filters within or across drawers, the query will identify students that satisfy all the listed requirements.

2. Watch Lists:

Watch Lists are an easy way to identify previous advanced searches. You can use Watch Lists in a variety of ways, such as maintaining a list of students to send messages or appointment campaigns. Watch lists can be created using Advanced Search or by selecting students individually.

3. Saved Searches:

Saved Searches allow users to conduct a pre-configured Advanced Search without having to manually and repeatedly create a new Advanced Search. Unlike Watch Lists, which save a static list of the same students, a Saved Search dynamically regenerates a list of students or users based on the search criteria. This feature can be especially helpful for users who frequently run the same search at different points in the term, as it allows you to maintain consistency with your search parameters.

4. Reporting

Reporting in Navigate is a feature that allows users to generate reports on a variety of topics, including alerts, progress, and appointments. Users can access reports by clicking the sidebar. As a single source of consolidated data points, Navigate creates a unified analytics platform which link numerous campus stakeholders around student success challenges. This function can be used to make informed decisions around student intervention strategies, such as improving student interactions and maximizing faculty and staff workflow.



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How to Run a Report in Navigate

Navigate gives staff the ability to pull reports related to various elements in Navigate such as Enrollments, Cases, Appointments, and more by using the report function and various filters.

What: Reports contain data and analytic insights related to student success programs.

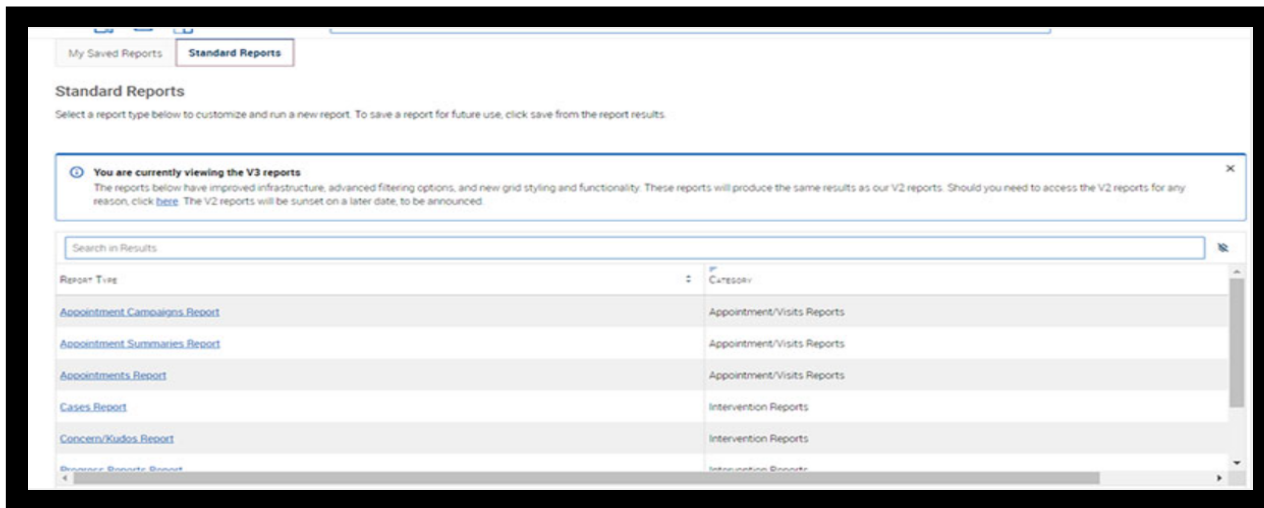
Where: Access the Reports landing page by selecting the Reports icon on the left sidebar.

Who: Reporting is a helpful tool for staff tasked with pulling reports and analytics related to student success programs. Your role determines if you see the report icon and have access to the report feature in Navigate.

Getting Started:

When you click on the Reports Icon Run a Report 1 you will open the reports page in Navigate.

- Click on the Standard Report Tab.
- Review the report type and category information.

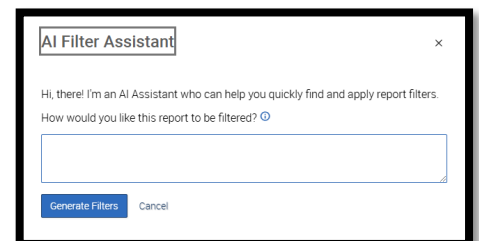
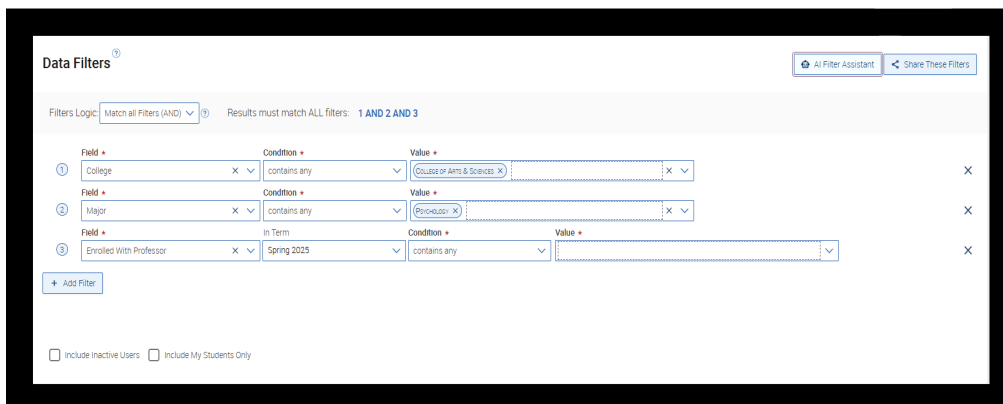


Building a Report

Click on the Report Name.

EX: Enrollment Report

AI Assistant allows you the utilize a prompt to help you quickly find and apply report filters. (see image below)



Add a Data Filter

To generate a report, begin with creating your search parameters. Use Data Filters to define report-specific behavior or objects. Select a field, condition, and value for each row. Filters can be mixed and matched for more precision in your report.

Tips and tricks:

- Fields are specific to your report type.
- Conditions vary by data type. For example, if a field contains dates, you can filter by a date range.
- Values are specific to each field.
- Want all available data? Filter by a required field and select the "is not empty" condition.

Report Results:

Student Name	Email	Student ID	Alternate ID	Courses	Title	Major	Courses	Alternate ID	Courses GPA	Student Name	Email

Send a Message to your Student List using the Actions Drop-Down:

Once you have generated a report of student names you can use the Actions Dropdown to perform additional tasks, like messaging a group of students, adding a To-Do, etc...

Student Name	Email	Student ID	Alternate ID	Courses	Title	Major	Courses	Alternate ID	Courses GPA	Student Name	Email

If more than 100 names, Click here to include all names in your messaging.

242 selected 1 - 100 of 242 100 K < 1 2 3 > X

Exporting Options:

You can export your list to Excel by clicking on the **export icon**.

Report Results

Actions Search in Results Export

Student Name	Email	Student ID	Alternate ID
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Or create a Pivot Table by clicking on the **Pivot Table icon**.

Report Results

Actions Search in Results Load grid in to a pivot table

<input checked="" type="checkbox"/>	STUDENT NAME	EMAIL	STUDENT ID	ALTERNATE ID
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How to Save a Report

Once you create a report you have the option to Save the report, by clicking on the Save As field on your report page. Remember to name the report in as many details as possible, to be able to differentiate between similar reports.

Report Information

Unsaved Report Load Saved Report Save As...

If you save your report, you will see the report listed in your **My Saved Reports** section.

This is especially helpful if the parameters you used in your saved report need to be run more than once.

To access the report, just **click on the name**.

Reports

My Saved Reports Standard Reports

Saved Reports

Access your Saved Reports below. To add a new Saved Report, run a Standard Report and click save from the report results.

You are currently viewing your saved reports

Some of the saved reports below may have been saved using our V2 report functionality. The V2 reports will be deprecated on a later date, to be announced. Should you need to access the V2 reports for any reason, click [here](#). Please resave these reports using our new V3 reports as the V2 saved reports will also be removed upon deprecation. Additionally the V3 reports cannot currently be scheduled, this functionality is coming soon.

Search in Results

NAME	REPORT TYPE	CREATED ON	ACTIVE SCHEDULE	PAST REPORTS
Aug 8 report	Case	08/03/2022	No	