


Navigate: Generating Reports

For running reports which are term bound to the current term


1. 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:
 - 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.
 - Student Enrollments*: will run a course listing for each of the students who fall into the parameters set.

2. Add Additional Student Filters

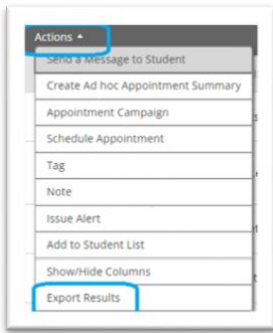
- Click to expand the filter categories after clicking on the report that you want to create: *Student Information, Enrollment History, Area of Study, Term Data, Performance Data, Course Data, Assigned To, and/or Success Indicators*.
- Search for information about a specific, known set of students, or 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.
 - 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.

NOTE:

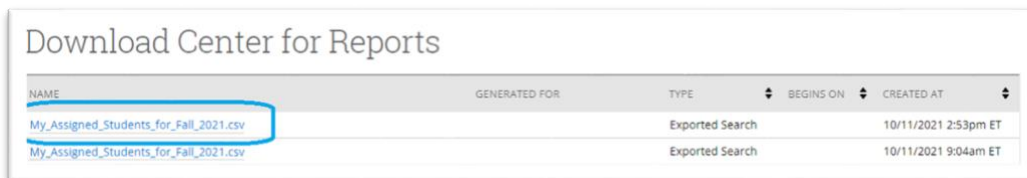
- Some filters require that the user begins typing the first few letters prior to making a recommendation for what to enter. Some filters provide a list of the only options in a drop-down menu.
- Under *Student Information, Category* refers to an attribute which is coded in Banner. To search by Banner 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. Example:

3. Export the report

- 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.

2. Optional: Select a different term

- Click the drop-down menu next to [Terms](#) in the top right corner of the page.
- Select the desired term and run the report with the alternative term selected in the top right corner to run the report based on information for that term.