
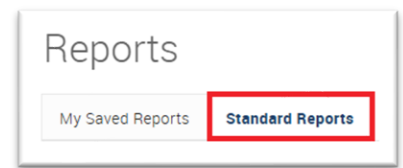


Navigate360: Generating Reports in V3

For running reports bound to a current term, exporting results, and taking an action

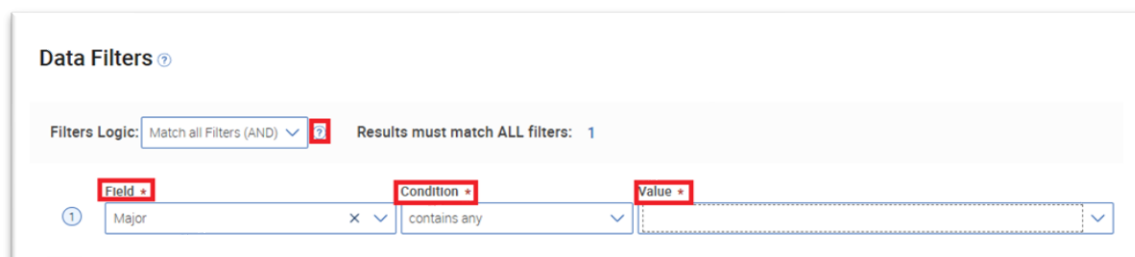
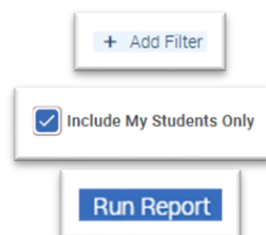
1. Select a Report to Run

- Click the [Reporting](#)  icon from the left navigation
- Click on the [Standard Reports](#) tab
- A [Reports](#) page will load with a list of [Report Types](#) and their [Category](#) (report's purpose)
- Click on the desired report to run
 - **RECOMMENDATIONS:**
 - [Students Report](#): This is the most common report and will run a list of students and retrieve general student data
 - [Students Enrollment Report](#): Will run a list of students enrolled courses. This report is best if looking for students who have dropped a course, and looking at midterm & final grades.
 - See the [V3 Reports Glossary.pdf](#) for a breakdown of each V3 report and their report purpose
 - **NOTE:** The [Students Enrollment Report](#) is the only report where a user can select an [Enrollment Term](#) field. For all other [Term Fields](#) in a report, make sure your [Default Term](#) matches the Term you are searching for (**EX:** If looking for a [Term GPA](#) for Fall 2025, a user's [Default Term](#) must be set to Fall 2025)



2. Add Data Filters

- Filter [Conditions](#) in V3 Reporting have three parts: a [Field](#), [Condition](#), and [Value\(s\)](#)
 - **Field:** a data filter that holds one type of information
 - **Condition:** a logical operator used to determine the results when combined with the Field and Value
 - **Value(s):** the specific information in the field that the user is trying to find, or eliminate, from the report results
- Filter [Logic](#) options determine how criteria is interpreted by the system
- See the [V3 Understanding Data Logic.pdf](#) for a table of contents explaining V3 fields, conditions, and logics
 - **NOTE:** Click the [?](#) icon next to [Filters Logic](#): for a quick explanation and to change the report [Logic](#)
- See the [V3 Report Unique Fields Glossary.pdf](#) for a breakdown of the unique fields and their purpose/outcome
- To add multiple data filters, click [+ Add Filter](#)
- To search for only your assigned students, check the box beside [Include My Students Only](#)
- When all filters are applied, click [Run Report](#)


A screenshot of the 'Data Filters' section in the reporting tool. It shows a 'Filters Logic' dropdown set to 'Match all Filters (AND)' and a 'Results must match ALL filters: 1' indicator. Below this, a filter rule is displayed with three components: 'Field' (Major), 'Condition' (contains any), and 'Value' (empty). Each component has a red box highlighting its label.A screenshot of the bottom right controls. It includes a '+ Add Filter' button, a checked checkbox for 'Include My Students Only', and a 'Run Report' button.

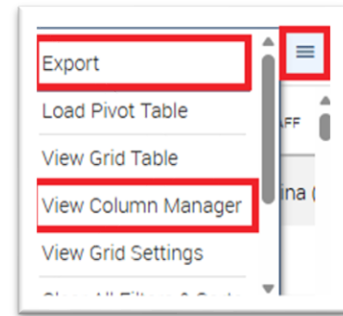
Continue to next page...

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3. Export Results

- When a list of students is generated, click *the hamburger menu*  to the right of the search result box.
- Click *Export*
 - **NOTE:** The system defaults to exporting all columns. From *the hamburger menu*, click *View Column Manager* to select the columns you want to export before exporting results. Otherwise, columns will need to be deleted in excel after exporting if they are not needed.



4. Take an Action on Results

- To take an *Action* on all students generated, check the box beside *Student Name*
 - **NOTE:** If your search includes 100+ students, to take the action on all students, click the *check mark* in the *pages footer*
 - **NOTE:** To take an action only on 100 students or less, toggle the *100 bar* to the right
- Click the *bullseye icon*  to select an *Action*
- *Actions* available are:
 - *Send a Message to Student*
 - *Create an Appointment Campaign*
 - *Add to Student List*
 - *Add To-Do*
 - *Add Journey*

