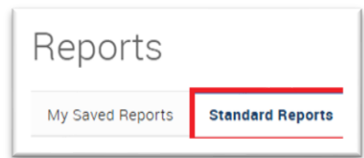


# Navigate360: Notification or Referral Reports in V3

For running reports of students marked at-risk by faculty or other staff during a specified timeframe.

## 1. Open the Alerts Report

- Click the *Reporting*  icon from the left navigation
- Click the *Standard Reports* tab
- Select the *Notification or Referrals Report*

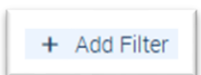


## 2. Input Data Filters

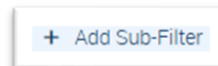
- **Field 1:** Notification or Referral Created At Date
  - **Condition:** Date Range
  - **Start Date:** the *Start Date* of a selected timeframe or the Monday of Week 3 in a term
  - **End Date:** the *End Date* of a selected timeframe or the Monday of Week 6 in a term

### ADDITIONAL/OPTIONAL FILTERS:

- To narrow a search, users can add the additional filters. To add a filter, click *+ Add Filter*
- To filter by major:
  - **Field 2:** Major
    - **Condition:** Contains any
    - **Value:** Select the major(s) advised from the dropdown selection
- To filter by assigned advisor:
  - **Field 3:** Relationship Type (then choose Assigned To)

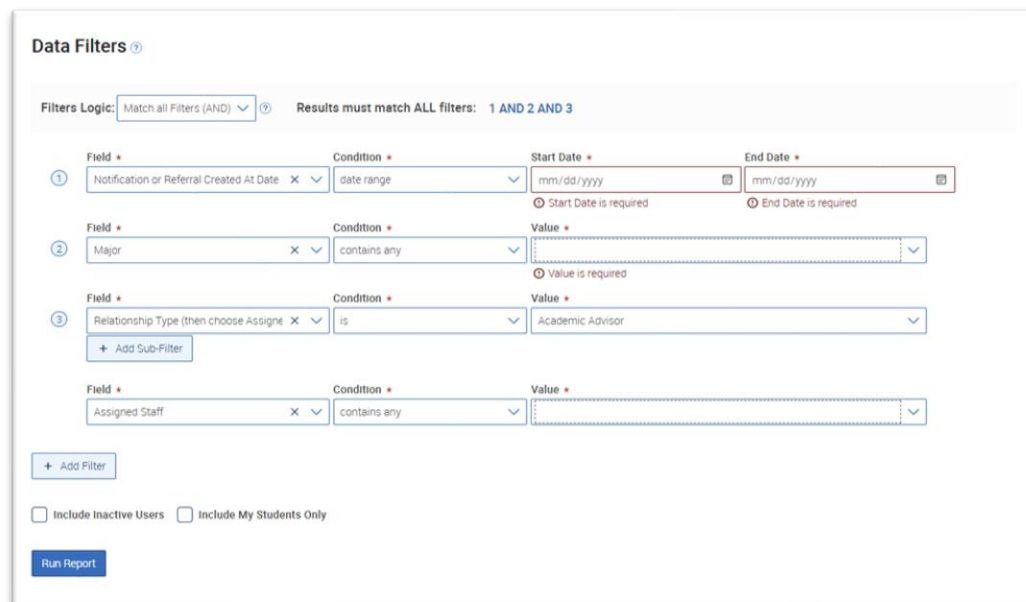


- **Condition:** is
- **Value:** Select the Relationship Type tied to a student
- Click *+ Add Sub-Filter*
  - **Field:** Assigned Staff
  - **Condition:** Contains any
  - **Value:** Select the name(s) of the advisor from the dropdown selection



- **NOTE:** If the user running the report is searching for students only assigned to them, check the box beside *Include My Students Only* and refrain from adding Field 3

- Click *Run Report*




The screenshot shows the 'Data Filters' section of the application. It includes a 'Filters Logic' dropdown set to 'Match all Filters (AND)' and a note that 'Results must match ALL filters: 1 AND 2 AND 3'. There are four filter rows, each with a 'Field', 'Condition', and 'Value' dropdown. The first row is for 'Notification or Referral Created At Date' with a 'date range' condition and date pickers for 'Start Date' and 'End Date'. The second row is for 'Major' with a 'contains any' condition. The third row is for 'Relationship Type (then choose Assign)' with an 'is' condition and a value dropdown. The fourth row is for 'Assigned Staff' with a 'contains any' condition. Below the filters are checkboxes for 'Include Inactive Users' and 'Include My Students Only', and a 'Run Report' button.

Continue to next page...

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### 3. Export or Take an Action on the Report

- When a list of students is generated, click *the hamburger menu*  to the right of the search result box
- Click *Export*
- Click the name of the file from your downloads
- To take an action on the results, click the checkbox beside *Student Name* to select all
- Click the *bullseye* icon
- Select the action. *Actions* vary if the results are less or more than 100 students

