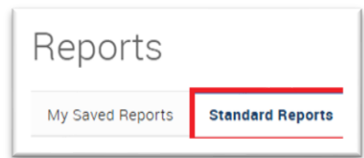# Navigate360: Notification or Referral Reports in V3

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] icon from the left navigation
- Click the *Standard Reports* tab
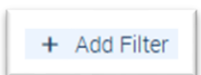- Select the *Notification or Referrals Report*
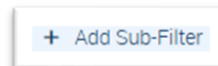
2. Input Data Filters
- **Field 1:** Notification or Referral Created At Date
  - **Condition:** Date Range
  - **Start Date:** the *Start Date* of a selected timeframe or the Monday of Week 3 in a term
  - **End Date:** the *End Date* of a selected timeframe or the Monday of Week 6 in a term

ADDITIONAL/OPTIONAL FILTERS:
- To narrow a search, users can add the additional filters. To add a filter, click *+ Add Filter*
- To filter by <u>major</u>:
  - **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)
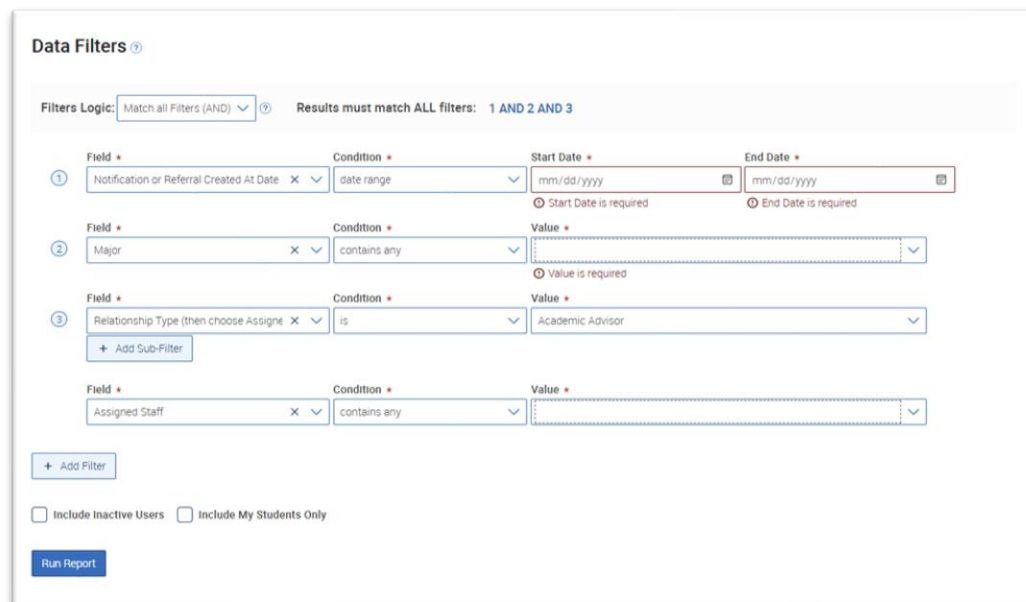   - **Condition:** is
    - **Value:** Select the Relationship Type tied to a student
    - Click *+ Add Sub-Filter*
      - **Field:** Assigned Staff
      - **Condition:** Contains any
      - **Value:** Select the name(s) of the advisor from the dropdown selection
    - **NOTE:** If the user running 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*

Navigate360: Notification or Referral Reports in V3

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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