

Reports and Shortcuts

User Guide – August 2024

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Reports are a helpful tool that can give you data and analytic insights related to students. Reports offer more flexibility to specify exact search parameters than Advanced Search, and they allow you to choose the same actions as Advanced Searches: Send a message, Create Student Lists, Add a Note, Create an Appointment Campaign, and export the results.

There are a variety of reports to choose from including Appointments, Alerts, Cases, Progress Reports, Academic Plan Utilization, Notes, Students Enrollments, and Students Active for Term. Staff have the ability to save reports which they can then run on a periodic basis to provide up-to-date information.

One of the best features of Reports is that users can **share filters** with each other! This means that if you have developed a report, you can share it with your co-workers so that they can run it without having to create it from scratch themselves. **See the next page of this guide to run some reports that we have created for you (“shortcuts”).**

Shortcuts

When you are logged into Navigate/R4S and click on one of the links below, the report will open in Navigate! Click 'Run Report' to run it immediately or modify the filters first. Note:

- These shortcuts are filtered by "my students only"; uncheck if you would like to view by school or other advisors.
- Update the filters with your school/college, desired dates/terms, tags, major, and any other information that you would like to include.

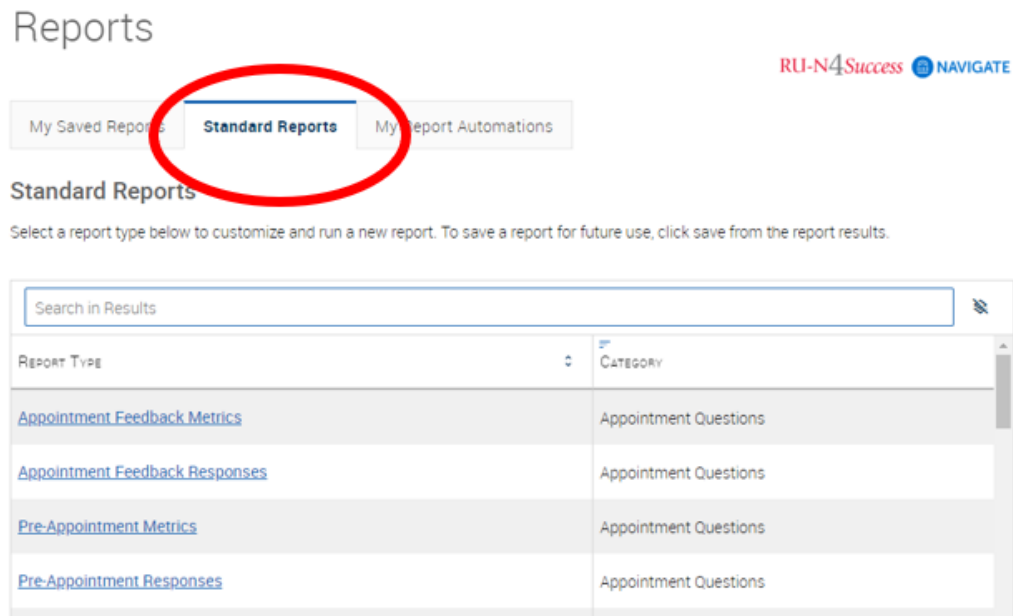
1. [Students without appointments](#)
2. Progress Reports that have been submitted on your assigned students
 - a. [Concerns](#)
 - b. [High fives](#)
 - c. [Students with 3 or more PR concerns \(specify dates\)](#)
3. [Students who registered for current term but not yet the following term](#)
4. [Hand Raises for advisors to review completed Academic Plans](#)
5. [Academic Planner: students with no planned terms](#)
6. [Open cases](#)
7. [Student Enrollments Reports](#)
 - Lists all the courses in which students are enrolled in a given term. Results include columns for 'Dropped?' and 'Dropped Date' so you can screen those out as desired. Results also include final course grades and whether the student received a Progress Report for that course. Remember that Progress Reports can be positive feedback or a concern.
8. [Personal email addresses](#)
 - To stay in touch with students after they leave RU-N
9. [Students in selected course\(s\)](#)
 - Results include the final course grade so you can identify students who need to repeat the course or those who should be enrolling in the next course in a sequence.
10. [Students with fewer than 30 credits earned/registered and not registered for summer](#)

How to Run Reports:

1. Select *Reporting* on the left-hand side of the screen:



2. The first tab that you will land on is *My Saved Reports* – this is where you will find all of the reports that you have saved to quickly refer to at a later time. The second tab, *Standard Reports*, is where you have the ability to customize and run new reports.



3. Select a report. The building a report screen will open:

The screenshot shows the 'Data Filters' interface. At the top, there is a header 'Unsaved Report' and a 'Save As...' button (labeled 'd'). Below this is the 'Data Filters' section (labeled 'e') which includes a 'Filters Logic' dropdown set to 'Match all Filters (AND)' (labeled 'c') and a 'Results must match ALL filters: 1' indicator. A filter selection area (labeled 'a') contains a 'Field' dropdown menu and an '+ Add Filter' button. At the bottom of the filter section, there are two checkboxes: 'Include Inactive Users' and 'Include My Students Only' (labeled 'b'). A 'Run Report' button is located below the filter section.

- a. **Select filters** here. You can filter on items such as dates, schools (“colleges” in EAB-speak), majors, and more.
- b. Select this if you would like to include only the students that are assigned to you in the search results.
- c. You are able to select any type of Boolean search for your results:
 - i. Match all filters (AND)
 - ii. Match any filters (OR)
 - iii. Advanced (AND/OR)
- d. After you select all of the necessary filters, click **Run Report** and view your report search results. If you are satisfied that it is pulling the data you want, save your reports by clicking ‘**Save As**’. The next time you want to run it, it will be in the *My Saved Reports* tab.
- e. **Share your filters** by clicking on this button. It will be copied as a link that you can send to coworkers.
 - i. Note: if you select “include my students only” and share the filters, your coworkers will be able to view the search results based on their own assigned students.