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 **HOW TO RUN REPORTS**

**Locate a Report Type.**

* Click on the **Reporting** icon in Navigate Staff.
* Select the **Standard Reports** tab.
* In the **Search in Results** box, type a few words to describe the type of report you seek (e.g., appointment).
* From the list of available report types, click on the link for the report you wish to run (e.g., **Appointments Report**).

**Tailor Your Report With Data Filters.**
**IMPORTANT:** Be sure to filter your reports using **Classification** (undergraduate), **Enrollment Term** (e.g., enrolled or not enrolled in current or future term), **Categories** (e.g., exclude students with certain holds), and **Tags** (e.g., applied for graduation). See page two for sample search/report parameters.

* In the first filter, type **Care Unit** into the first search field box.
* Select the **Care Unit** option from the drop-down menu.
* In the Value field, type the first word of the care unit for which you will be reporting activity (e.g., University).
* Select the name of the care unit from the drop-down menu (e.g., University Honors Program).
* Click **+Add Filter** to refine your search results using one or more parameters (e.g., **Date**).
* Type the first words of the search parameter or scroll through the list of available options to select a search field to return the results you need.
* In the Condition field, select the condition to refine your search (**Date Summary Report Submitted**).
* In the Value field, select an option for your search (e.g., range of dates in the term).
* If some students withdrew from NIU during the term, you can select **Include Inactive Users** to retrieve a complete report of appointments from the specified date range.
* Click **Run Report** to see the report results.
* Click the **+Add Filter** to refine your search results using one or more parameters (e.g., **Date**).
* Type the first words of the search parameter or scroll through the list of available options to select a search field to return the results you need.
* In the Condition field, select the condition to refine your search (**Date Summary Report Submitted**).
* In the Value field, select an option for your search (e.g., range of dates in the term).
* If some students withdrew from NIU during the term, you can select **Include Inactive Users** to retrieve a complete report of appointments from the specified date range.
* Click **Run Report** to see the report results.

**Accessing Your Report Results.**

* As the report runs, the button will appear gray and will read **Running Report…**
* When the report has finished, the names of students will appear in the box where the three dots had shown. (Note: The count at the bottom of the list of students shows the number of rows returned in the report and not the number of distinct students.)
* To export report results as an Excel file (CSV file), click on the export icon located across the top row of the search result table. (Note: The icon appears as a down-arrow pointing to a box.)

**Create a Campaign or Extract List.**

* + Select the **Action** menu to **Create an Appointment Campaign** to reach out to students did not show for appointments.
	+ To export report results as an Excel file (CSV file) click on the export icon located across the top row of the search result table. (Note: The icon appears as a down-arrow pointing to a box.)

Here is a list of filters containing various characteristics that you can use to identify cohorts of students based on specific characteristics.

* + **Student Information**: Includes searching by **Student Lists**, **Tags**, **Categories**, and transfer status.
	+ **Enrollment History**: Identify students who are enrolled or not enrolled in one or more terms.
	+ **Area of Study**: Identify students within college(s), major(s), concentrations, or degrees.
	+ **Term Data**: Includes filters for minimum or maximum credit hours, classification (year-in-class).
	+ **Performance Data**: Includes filters for GPA, hours, and credits overall (not just for the current term).
	+ **Course Data**: Identify students by course(s) in which they are enrolled by term.
	+ **Assigned To**: Identify students assigned to specific staff by name or, role.
	+ **Success Indicators**: Identify students by specific success markers or by number of missed markers.

**Note**: There are several fields containing a **(+)** icon. Click this icon to expands to show additional fields for conditional searching (e.g., **In All of these** or **In None of these**) to search for students who do not meet those conditions.