Navigate Reports Index
# Table of Contents

**Appointment Reports** ................................................................. .4
- Appointments ........................................................................... .5
- Appointment Summaries .......................................................... .6
- Daily Appointments .................................................................. .7
- Students with/without an Appointment ........................................ .8
- Cancellation Summaries .............................................................. .9
- Appointment Stats .................................................................... .10
- No-Shows .................................................................................. .11
- Availability ................................................................................ .12
- Appointment Activity ............................................................... .13
- Cancellation Summary Stats ...................................................... .14
- Service Totals ............................................................................. .15
- Availability by Course .............................................................. .16
- Appointment Requests by Course .............................................. .17
- Appointment Requests ............................................................... .18
- Check-ins .................................................................................... .19
- At-Risk Progress Reports And Appointments ............................... .20

**Alerts & Cases** ........................................................................... .21
- Alerts ........................................................................................... .22
- Cases ........................................................................................... .23

**Student Information Reports** .................................................... .24
- Students Active for Term ............................................................. .25
- Students With/Without Advisors ................................................. .26
- Students with Courses ............................................................... .27
- Students by Category and Course ............................................... .28
- Student Assignments ................................................................. .29
- Student Assignments Past Due .................................................... .30
- Notes ........................................................................................... .31
Table of Contents

Enrollments & Attendance ......................................................... 32
Absences .......................................................... 33
Absence Details ......................................................... 34
All Recorded Attendances .................................................. 35
Sections with/without Attendance ...................................... 36
Dropped Classes ........................................................... 37
Non-Campaign Enrollment Census Report ......................... 38
Progress Reports .......................................................... 39
Student Progress Reports ................................................... 40
Progress Report Requests .................................................. 41
Students Flagged At-Risk .................................................... 42
Detailed Students Flagged At-Risk ....................................... 43
Detailed Student Progress Reports ....................................... 44
Users ............................................................. 45
Users Who Have Logged In .................................................. 46
Users Who Have Not Logged In ............................................ 47
Professors Active for Term .................................................. 48
Study Hall .............................................................. 49
Students Currently Checked In ............................................. 50
Students Recently Checked Out ............................................ 51
Charity Time ............................................................. 52
Completed Required Study Hours ........................................ 53
Did Not Complete Required Study Hours ......................... 54
Weekly, Monthly, Term Time ............................................... 55
History Log ............................................................. 56
Additional Reports .......................................................... 57
Student Services .......................................................... 58
Conversation Stats .......................................................... 59
Creating and Taking Action on Reports ............................. 60
Appendix ................................................................. 63
Appointment Reports
Appointments

Fields

Student Email
Student
Care Unit
Begin Date Time
End Date Time
Location
Duration
Reported Duration
Appointment Type
Organizer External
Staff Name
Staff Email
Student ID
Student Name
Classifications
Major
Appointment Created By
Appointment Created At
Is No Show
Scheduled Course Number
Scheduled Course Name
Appointment Reasons
Reported Reasons
Appointment Comments
Is Report Filed
Date Submitted
Reported Course Number
Reported Course
Appointment Cancelled By
Cancellation Reason
Cancellation Comment
Meeting Type
Arrived At
Departed At
Unused Slots
Summary
Cumulative GPA
Categories
Alternate
Assigned Advisors

Description

This report gives you information about appointments and related data, including summary and cancellation details within the selected date range. Users will need access to view appointments and summaries for at least one Care Unit to access the data and filters in this report.

Report Filters for Appointment Report

Generated Appointment Report
Appointment Summaries

Description

This report gives you information about appointment summaries created within the selected date range. Only appointments with summary reports will show. To find appointments without summary reports, please use the "Appointments" report. Users will need access to view appointments and summaries for at least one Care Unit to access the data and filters in this report.

Report Filters for Appointment Summaries Report

Generated Appointment Summaries Report
### Daily Appointments

**Fields**
- Student
- Care Unit
- Begin Date Time
- Location
- Appointment Type
- Duration
- Reported Duration
- Staff Name
- Student ID
- Student Name
- Assigned Staff
- Categories
- Scheduled Course Number
- Scheduled Course Name
- Appointment Reasons
- Reported Reasons
- Appointment Comments
- Student Phone
- Student Email
- Organizer Cell Phone
- Organizer Work Phone
- Staff Email
- Appointment Created By
- Alternate
- Major
- Cumulative GPA

**Description**

This report gives you information about appointments and related data, including summary details for appointments within the selected date range. Users will need access to view appointments and summaries for at least one Care Unit to access the data and filters in this report.

**Report Filters for Daily Appointments Report**

**Generated Daily Appointments Report**
Students With/Without an Appointment

Description

This report shows whether students have or have not had an appointment matching the report filters within the selected date range. This report is limited to students matching the student filters, who are enrolled in the term selected in the global term filter above. For students with appointments, the details for only the most recent appointment is displayed. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

Report Filters for Students With/Without an Appointment Report

Generated Students With/Without an Appointment Report
Cancellation Summaries

Fields
- Student ID
- Care Unit
- Student Name
- Classification
- Categories
- Staff Name
- Appointment Reasons
- Appointment Type
- Location
- Begin Date Time
- Cancelled On
- Counted as No Show
- Appointment Cancelled By
- Cancellation Reason
- Cancellation Comment
- Appointment Created By
- Alternate
- Student Email
- Staff Email
- Major
- Cumulative GPA
- Assigned Advisors

Description
This report gives you information about cancelled appointments and related data, including summaries and cancellation details for appointments in the specified timeframe. Users will need access to view appointments and summaries for at least one Care Unit to access the data and filters in this report.

Report Filters for Cancellation Summaries Report

Generated Cancellation Summaries Report
Appointment Stats

Description

This report gives you information about the number of appointments, and students within appointments, within the selected date range. Users will need access to view appointments and summaries for at least one Care Unit to access the data and filters in this report.

Report Filters for Appointment Stats Report

Generated Appointment Stats Report
No-Shows

Description
This report gives you information about no-show appointments, and students within appointments, within the selected date range. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

Report Filters for No-Shows Report

Generated No-Shows Report
Availabilities

Description

This report shows staff with availabilities and related data. Users will need access to create and edit availability for other users for at least one Care Unit to access the data and filters in this report.

NOTE: when using 'Export to Excel' for this page, the export will contain one line per availability set by the staff. As a result, some staff members and courses will be listed multiple times. This allows for better data manipulation within Excel.

Report Filters for Availabilities Report

Generated Availabilities Report
Appointment Activity

Description

This report gives you information about appointments and related data within the selected date range. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

Report Filters for Appointment Activity Report

Generated Appointment Activity Report
Cancellation Summary Stats

Fields
- Care Unit
- Cancellation Reason
- Recorded Cancellations
- Percentage of Cancelled Appointments

Description

This report gives you information about the number of cancelled appointments and cancellation reasons, for appointments in the specified timeframe. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

Report Filters for Cancellation Summary Stats Report

Generated Cancellation Summary Stats Report
**Service Totals**

**Fields**
- Reason
- Care Unit
- Number of Appointments
- Percentage of Appointments
- Average Duration
- Longest Duration
- Shortest Duration

**Description**

This report gives you information about the number of appointments and duration data, within the selected date range. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

**Report Filters for Service Totals Report**

**Generated Service Totals Report**
Availabilities by Course

Fields
- Staff Name
- Cell Phone
- Staff Email
- Course Number
- Course
- Care Unit
- Available Times

Description
This report shows staff with availabilities that include courses and related data. Users will need access to create and edit availability for other users for at least one Care Unit to access the data and filters in this report.

NOTE: when using 'Export to Excel' for this page, the export will contain one line per availability set by the staff. As a result, some staff members and courses will be listed multiple times. This allows for better data manipulation within Excel.

Availabilities By Course
This report shows staff with availabilities that include courses and related data. Users will need access to create and edit availability for other users for at least one Care Unit to access the data and filters in this report. Please note, when using 'Export to Excel' for this page, the export will contain one line per availability set by the staff. As a result, some staff members and courses will be listed multiple times. This allows for better data manipulation within Excel.

Report Filters for Availabilities by Course Report

Generated Availabilities by Course Report
Appointment Requests by Course

**Fields**
- Care Unit
- Course Number
- Course
- Number of Appointment Requests

**Description**
This report gives you information about the number of appointment requests for specific courses, within the selected date range. Users will need access to view appointment requests for at least one Care Unit to access the data and filters in this report.

Report Filters for Appointment Requests by Course Report

Generated Appointment Requests by Course Report
Appointment Requests

**Fields**
- Created At
- Student ID
- Student Name
- Assigned Advisors
- Student Email
- Classification
- Service
- Request Care Unit
- Course Dropped At
- Course Number
- Course
- Is Matched
- Matched At
- Matched By
- Organizer Name
- Organizer Email
- Meeting Times
- Begin Date Time
- Requested By
- Alternate
- Cumulative GPA
- Major
- Categories

**Description**

This report gives you information about appointment requests, and students who made the request, within the selected date range. This report requires that a student be registered in a major and be present in at least one term. Users will need access to view appointment requests for at least one Care Unit to access the data and filters in this report.

![Appointment Requests](image)

**Report Filters for Appointment Requests Report**

![Report Filters](image)

**Generated Appointment Requests Report**

![Generated Report](image)
## Check-Ins

### Fields
- Created At
- Care Unit
- Student ID
- Student Name
- Categories
- Appointment Reasons
- Appointment Comments
- Appointment Type
- Course Number
- Course Name
- Date of Birth
- Cumulative GPA
- Term GPA
- Student Email
- Class
- Major
- Tags
- Race
- Check In Location
- Visit State
- Visit Modified At
- Duration
- Arrived At
- Departed At
- Check Out Location
- Checked Out from Report
- Checked Out from Profile
- Staff Name
- Staff Email
- Alternate
- Assigned Advisors
- Staff Member

### Description

This report gives you information about check-ins and related data, including locations and check-out information, within the selected date range. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

### Check-ins

This report gives you information about check-ins and related data, including locations and check-out information, within the selected date range. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

![Check-ins Report](image)

### Report Filters for Check-Ins Report

### Generated Check-Ins Report
At-Risk Progress Reports and Appointments

Fields
Student ID
Student Name
Student Email
Major
Categories
Section
Course No
Course
Dropped?
Midterm Grade
Final Grade
Date Submitted
At Risk?
Number of Absences
Grade
Comment
Appointment Created
Appointment Care Unit
Student Attended
Instructor
Instructor Name
Instructor Email
Alternate
Cumulative GPA
Assigned Advisors
Alert Reasons

Description
This report gives you information about students who have been reported as 'At-Risk' in a course and any appointment for that course, within the selected date range. This can help you determine if students who are marked At-Risk are being processed effectively with appointments by staff members. Also, with Dropped Dates, Appointments Dates, and Grades, the report shows effectiveness of those actions. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

Report Filters for At-Risk Progress Reports and Appointments Report

Generated At-Risk Progress Reports and Appointments Report
Alerts & Cases
**Description**

This report will display all Alerts issued on students during the date range selected. This report is filterable by Alert Reason and Case Issuer to narrow down alerts as well as the usual set of search filters.

**Report Filters for Alerts Report**

**Generated Alerts Report**
**Cases**

**Description**
This report will display all Alerts issued on students during the date range selected. This report is filterable by Alert Reason and Case Issuer to narrow down alerts as well as the usual set of search filters.

![Cases Report](image)

**Report Filters for Cases Report**

![Report Filters](image)

**Generated Cases Report**
Student Information Reports
Students Active for Term

Description
Lists all students who are considered active for the current term. If you have questions about what your institution uses to determine active status, please contact your institution's technical team.

Note: The Students Active for Term report Classification field is populated from the classification table in the GradesFirst DB. It depends on the Global filter for the school. For example, a student might be a sophomore for athletics, but a junior under the larger filter for the whole institution.

Fields
- Primary Student ID
- Student Name
- E-mail Address
- Cell Phone
- Home Phone
- Term Credit Hours
- Total Credit Hours Earned
- Name
- Gender
- Ethnicity
- Majors
- Overall GPA
- Term GPA
- Minutes per Week
- Enrolled Courses
- Dropped Courses
- Absences
- Unexcused Absence Count
- Categories
- Tags
- Date of Birth
- Race
- Activated At
- Address 1
- Address 2
- City
- State
- Zip
- Assigned Advisors

Report Filters for Students Active for Term Report

Generated Students Active for Term Report
Students With/Without Advisors

Fields
- Student Name
- E-mail Address
- Class
- Cell Phone
- Categories
- Majors
- Advisor Name
- E-mail Address
- Assigned Through

Description

The following is a list of students and their assigned advisors, as well as students who do not have advisors. Each row contains a student and, if applicable, an assigned advisor. If a student has multiple advisors, the student will appear in multiple rows with a different advisor in each row, which allows for easier processing in Excel.

Report Filters for Students With/Without Advisors Report

Generated Students With/Without Advisors Report
Students With Courses

**Fields**
- Student Name
- E-mail Address
- Cell Phone
- Home Phone
- Name
- Majors
- Course Name
- Dropped?
- Course Dropped At
- Term GPA;
- Midterm Grade
- Final Grade
- Total Evaluations
- At Risk Evaluations
- Absences
- Excused Absences
- Appointment Requests
- Appointment Requests Fulfilled
- Gender

**Description**

This report gives a summary of each student's courses this term. Due to the size of the report, if the report does not load, try one of the following:
1) filter to smaller groups (i.e. category, tag, or classifications) or
2) export to Excel without showing on screen by clicking "Print Report" to the right without "Searching."

When using this report in Excel, you can weight absences, at-risk evaluations, tutor requests, and tutor appointments.

Report Filters for Students With Courses Report

Generated Students With Courses Report
Students by Category and Course

Fields
Student Name
Categories
Classifications
Majors
Cumulative GPA
Term GPA
Term Credits
Hours
Course #
Course
Starts On
Ends On
Class Starts At
Class Ends At
Meets
Location
Midterm Grade
Final Grade
Dropped?
Course Dropped At
At Risk?
Number of Absences
Projected Grade
Professor's Name
Professor's Email
Professor Comments
Completed By
Gender
Enrollment Status
Enrollment Goal

Description
This report displays each student’s course schedule.

Report Filters for Students By Category and Course Report

Generated Students by Category and Course Report
Student Assignments

**Fields**
- Student ID
- Student Name
- Course Number
- Course
- Cumulative GPA
- Term GPA
- Name
- Description
- Due At
- Completed On Time
- Completed At
- Points Received
- Points Available
- Weight
- Comment

**Description**
Generates a list of all student assignments that have been created in the platform for students.

**Report Filters for Student Assignments Report**

**Generated Student Assignments Report**
Student Assignments Past Due

Fields

- Student ID
- Student Name
- Course Number
- Course
- Cumulative GPA
- Term GPA
- Name
- Description
- Due At
- Completed On Time
- Completed At
- Points Received
- Points Available
- Weight
- Comment

Description

Generates a list of all student assignments in the platform that are considered past due for students.

Report Filters for Student Assignments Past Due Report

Generated Student Assignments Past Due Report
Notes

Fields
- Student Name
- Note
- Note Reasons
- Created At
- Author Name
- View Note

Description
This report will display any and all notes that have been created about a student within a specific date range. This report allows you to search within the text of notes as well as use the typical filters within the report advanced search.

Notes on Students

Report Filters for Notes Report

Generated Notes Report
Enrollments & Attendance
Absences

Description
This report shows a summary of all student absences in the platform within a date range. It does not cover each absence in detail. If you are looking for detail on each student absence, please choose the Absence Details report.

Report Filters for Absences Report

Generated Absences Report
Absence Details

Fields
Alternate ID
Student Name
Categories
Course #
Section
Course
Absence Date
Absence is Excused
Absence Comment
Travel Letter
Creator Name
Created At
Instructor
Instructor Name

Description
This report displays students who have absences recorded in the platform within a specific date range. It covers a more detailed range of fields than the Absences report.

Generated Absence Details Report
All Recorded Attendances

Fields
Alternate ID
Student Name
Categories
Course
Instructor
Instructor Name
Course Time
State
Excused?
Comment

Description
This report displays all attendances taken in the selected date range. It will show whether attendance has been taken and if a student was marked absent, present or tardy.

Report Filters for All Recorded Attendances Report

Generated All Recorded Attendances Report
Sections with/without Attendance

**Fields**
- Instructor
- Instructor Name
- Course
- Course Time
- Recorded
- Attendance Count
- Enrollment Count
- Attendance Recorded At
- Attendance Creator Name

**Description**
This report will display all of the course sections in the selected term and whether or not they have had any recorded attendance. You are able to filter on Date, Complete, Incomplete, or No Response.

![Sections with/without Attendance report]

**Report Filters for Sections with/without Attendance Report**

![Report Filters]

**Generated Sections with/without Attendance Report**

![Generated report]
Dropped Classes

**Description**
This report shows any students who have dropped a class.

**Report Filters for Dropped Classes Report**

Generated Dropped Classes Report
Non-Campaign Enrollment Census Report

Fields
- Student ID
- Student Name
- Enrollment Status
- Last Day of Attendance
- Course Dropped At
- Professor Name
- Course No.
- Section
- Course

Description
This report pulls from attendance information and will display the last day of attendance, and/or other enrollment information as provided by instructors.

Report Filters for Non-Campaign Enrollment Census Report

Generated Non-Campaign Enrollment Census Report
Progress Reports

CHAPTER 5
Student Progress Reports

Description

This report provides a simple summary of faculty/instructor reports on their students' academic progress. The report displays students who received any type of Progress Report for their course(s) for the given term. This report identifies if a student is “At-Risk” or not for a course, and, if applicable, provides the comments about the student’s progress, displays number of absences, and displays the grade associated to the Progress Report.

Report Filters for Student Progress Reports

Generated Student Progress Reports
Progress Report Requests

Fields

Description
This report displays all Progress Report requests by instructor and student during the date range selected.

Progress Report Campaign Reports

Report Filters for Progress Report Requests Report

Generated Progress Report Requests Report
Students Flagged At-Risk

**Fields**
- Student Name
- Category List
- Course
- At Risk?
- Number of Absences
- Grade
- Comment
- Evaluation Created By
- Date Submitted
- Instructor
- Instructor Name
- Alert Reasons

**Description**

The report is a condensed version of the Student Progress Report that only displays those students who have been marked At-Risk by faculty.

**Report Filters for Students Flagged At-Risk Report**

**Generated Students Flagged At-Risk Report**
Detailed Students Flagged At-Risk

**Fields**
- Student ID
- Student
- Email Address
- Class
- Sex
- Race
- Major
- Categories
- Section
- Course Number
- Course
- At Risk?
- Number of Absences
- Grade
- Comment
- Date Submitted
- Evaluation Created By
- Dropped?
- Midterm Grade
- Final Grade
- Completed
- From Campaign
- Instructor
- Instructor Name
- Alert Reasons

**Description**
This report displays the same type of information as the Student Progress Reports Flagged At-Risk, and identifies if the At-Risk status was from the Early-Alert Progress Report Campaign or not.

**Generated Detailed Students Flagged At-Risk Report**
Detailed Student Progress Reports

**Fields**
- Student ID
- Student
- Email Address
- Class
- Sex
- Race
- Major
- Categories
- Section
- Course Number
- Course
- At Risk?
- Number of Absences
- Grade
- Comment
- Date Submitted
- Evaluation Created By
- Dropped?
- Midterm Grade
- Final Grade
- Completed
- From Campaign
- Instructor
- Instructor Name

**Description**
This report provides more information on a student’s academic progress in courses in which a progress report has been submitted. This report displays students who received any type of Progress Report for their course(s) for the given term. This report identifies if a student is “At-Risk” or not for a course, and, if applicable, provides comments about the student’s progress, displays number of absences, grade associated with the Progress Report, Midterm and Final grades, informs faculty if the report was from an Early Alert – Progress Report Campaign initiative or not, and displays the student’s drop status for the course.

**Report Filters for Detailed Student Progress Reports Report**

**Generated Detailed Student Progress Reports Report**
Users
Users Who Have Logged In

**Fields**
- Name
- Email Address
- Cell Phone
- Activated On
- Edit

**Description**
Displays a list of all users who have logged into Navigate.

**NOTE:** This report does not populate if your institution uses single sign-on (SSO)!

Report Filters for Users Who Have Logged In Report
Users Who Have Not Logged In

**Fields**
- Name
- Email Address
- Cell Phone
- Activated On
- Edit

**Description**
Displays a list of all users who have NOT logged into Navigate.

**NOTE:** This report does not populate if your institution uses single sign-on (SSO)!

Report Filters for Users Who Have Not Logged In Report
Professors Active for Term

Fields
- Professor Name
- Email Address
- Work Phone
- Classes Taught
- Activated At
- Absences Marked
- Progress Report Created

Description
Displays a list of all instructors that are active for the current term.

Report Filters for Professors Active for Term Report

Generated Professors Active for Term Report
**Students Currently Checked In**

**Fields**
- Student Name
- Check In Date
- Location
- Care Unit
- Categories
- Elapsed
- Required
- This Week
- Remaining

**Description**
Displays a list of all students who are currently checked into study hall.

![Students Currently Checked Into Study Hall](image)

Report Filters for Students Currently Checked In Report

Generated Students Currently Checked In Report
Students Who Recently Checked Out

**Fields**
- Student Name
- Check In Date
- Check In Location
- Care Unit
- Check Out Date
- Check Out Locations
- Categories
- Elapsed
- Required
- This Week
- Remaining

**Description**
Displays a list of all students who checked out of study hall today. If no students have checked out of study hall today, then you will see no students on the list. This report refreshes each day.

**Students who Recently Checked Out of Study Hall**

Report Filters for Students Who Recently Checked Out Report

Generated Students Who Recently Checked Out Report
Charity Time

Fields

- Student ID
- Student Name
- Date
- Total Time (in minutes)
- Comment
- Creator Name
- Created At

Description

Displays charity time that has been assigned to students within a specified date range.

Charity Times

Report Filters for Charity Time Report

Generated Charity Time Report
**Completed Required Study Hours**

**Fields**
- Last Name
- First Name
- Class
- Categories
- Required Time Per Week
- Required Time for Date Range
- Total Time
- Remaining Time
- Student ID

**Description**
Displays a list of students who have completed their required weekly study hall hours.

![Completed Required Study Hours](image-url)

**Report Filters for Completed Required Study Hours Report**

![Report Filters](image-url)

**Generated Completed Required Study Hours Report**
Did Not Complete Required Study Hours

**Fields**
- Last Name
- First Name
- Class
- Categories
- Required Time Per Week
- Required Time for Date Range
- Total Time
- Remaining Time
- Student ID

**Description**
Displays a list of students who have not completed their required weekly study hall hours.

**Report Filters for Did Not Complete Required Study Hours Report**

**Generated Did Not Complete Required Study Hours Report**
Weekly, Monthly, Term Time

**Fields**
- Last Name
- First Name
- Class
- Categories
- Required Time Per Week
- Required Time For Date Range
- Total Time
- Remaining Time
- Student ID

**Description**

This report will display all Study Hall time required and captured within the date range that is chosen.

![Weekly, Monthly, Term Time]

**Report Filters for Weekly, Monthly, Term Time Report**

![Report Filters for Weekly, Monthly, Term Time Report]

**Generated Weekly, Monthly, Term Time Report**
# History Log

## Fields
- Student Name
- Student ID
- Checked In
- Check In Location
- Checked Out
- Check Out Location
- Total Time
- Auto-Check Out
- Charity Time
- Comments

## Description
Displays a detailed history log of study hall time including check-in and check-out location logged by students within a specific date range.

## Report Filters for History Log Report

## Generated History Log Report
Student Services Report

Fields
- Created At
- Care Unit
- Student ID
- Student Name
- Categories
- Appointment Reason
- Appointment Comments
- Appointment Type
- Course
- Course Number
- Date of Birth
- Cum. GPA
- Term GPA
- Email Address
- Class
- Majors
- Tags
- Race
- Check In Location
- Visit State
- Visit Type
- Visit Modified At
- Duration
- Check In Date
- Check Out Date
- Check Out Location
- Checked out From Report
- Checked out From Profile
- Staff Member
- Report Summary
- Sections
- Section External ID

Description

This report gives you information about appointments and related data, including services and students within appointments for the selected date range. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

Report Filters for Student Services Report

Generated Student Services Report
Conversation Stats

Description

This report will display how many texts, emails, and phone calls each staff member has initiated during the date range selected. Users will need access to view appointments for at least one Care Unit to access the data and filters in this report.

Report Filters for Conversation Stats Report

Generated Conversation Stats Report
Creating & Taking Action on Reports
Generating a Report

Creating a report follows the same actions for all the existing reports. The fields will be different and some of the actions will be different, but the steps to create a report in Navigate are the same.

1. Click the report name.
2. An Advanced Search (not the same as the regular Advanced Search) opens.
3. Narrow the criteria for the search using the various drawers and fields at the top and the checkboxes at the bottom. Click Search to search and create the report.

4. The report will open.

5. Check the boxes of the students you wish to take action on and open the actions menu.

6. Select an action as desired.
## Actions Users Can Take on Reports

The list below are actions that may appear in the Action menu for various Reports. Not every action will appear for every report.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send a Message</td>
<td>Send messages to selected students</td>
</tr>
<tr>
<td>Export to Excel</td>
<td>Export the report columns as an Excel file</td>
</tr>
<tr>
<td>Add Note</td>
<td>Allows user to add a note about the selected students</td>
</tr>
<tr>
<td>Create Appointment</td>
<td>Create an appointment campaign with the selected students</td>
</tr>
<tr>
<td>Campaign</td>
<td></td>
</tr>
<tr>
<td>Tag</td>
<td>Add tags to the selected students</td>
</tr>
<tr>
<td>Checkout</td>
<td>Check selected students out of study hall</td>
</tr>
<tr>
<td>Charity Time</td>
<td>Allocate charity time to selected students</td>
</tr>
<tr>
<td>Show/Hide Columns</td>
<td>Allow user to show and hide columns in the report</td>
</tr>
<tr>
<td>Delete Cases</td>
<td>Allows user to delete selected cases</td>
</tr>
</tbody>
</table>
Appendix
## Navigate Reporting: Fields

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absence Comment</td>
<td>Text field for comments about student absence</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Absence Date</td>
<td>Date of student absence</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Absence is Excused</td>
<td>Y/N field, indicates if the absence is excused</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Absences</td>
<td>Count of student absences</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Activated At</td>
<td>When the student or professor account was activated in Navigate?</td>
<td></td>
</tr>
<tr>
<td>Activated On</td>
<td>The date a user account was activated in Navigate</td>
<td></td>
</tr>
<tr>
<td>Address 1</td>
<td>Student address, line 1</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Address 2</td>
<td>Student address, line 2</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Advisor Name</td>
<td>Name or names of the assigned advisors to a student</td>
<td>Institutional data import</td>
</tr>
<tr>
<td>Alert Reasons</td>
<td>Reasons selected when staff issues an alert on a student</td>
<td>Navigate Issue Alert Feature</td>
</tr>
<tr>
<td>Alternate</td>
<td></td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Alternate ID</td>
<td>Alternate student ID</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Appointment Attendee Count</td>
<td>Distinct number of students who attended an appointment for a staff member in a care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Appointment Cancelled By</td>
<td>Name of the student or staff member who cancelled an appointment</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Appointment Care Unit</td>
<td>The Care Unit the appointment is assigned to</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Appointment Comments</td>
<td></td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Appointment Count</td>
<td>Total count of appointments for a staff member in a single care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Appointment Created</td>
<td>Y/N field, indicates if appointment was created due to at-risk progress report</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Appointment Created At</td>
<td>Date and time the appointment was created</td>
<td>Navigate scheduling functionality</td>
</tr>
<tr>
<td>Appointment Created By</td>
<td>Staff or student who created the appointment</td>
<td>Navigate scheduling functionality</td>
</tr>
<tr>
<td>Appointment Reasons</td>
<td>Reasons selected when an appointment is created in Navigate</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Appointment Request Fulfilled</td>
<td>Number of appointment requests made by a student that were fulfilled</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Appointment Requests</td>
<td>Number of appointment requests made by an individual student</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Appointment Type</td>
<td>Type of appointment, selected from appointment types created in Navigate</td>
<td>Navigate SSMS</td>
</tr>
</tbody>
</table>
# Navigate Reporting: Fields

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrived At</td>
<td>Time student arrived at appointment location</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Assigned Advisors</td>
<td>Advising staff assigned to the student</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Assigned Staff</td>
<td>Staff assigned to an individual student</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Assigned Through</td>
<td>The method an advisor/staff member was assigned to a student</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Assignees</td>
<td>Staff member(s) assigned to a case</td>
<td>Cases feature</td>
</tr>
<tr>
<td>Associated Courses</td>
<td>Courses associated to an alert for a student</td>
<td>Navigate Issue Alert Feature and institution data</td>
</tr>
<tr>
<td>At Risk Evaluations</td>
<td>Number of &quot;at risk&quot; progress reports evaluations a student has received in the term</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>At Risk?</td>
<td>Y/N field, indicates if the student is marked as &quot;at risk&quot;</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Attendance Count</td>
<td>Count of students who have attended the section</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Attendance Creator Name</td>
<td>Staff member who recorded attendance in a section/course</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Attendance Recorded At</td>
<td>Time the class attendance was recorded</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Attended Count</td>
<td>How is this different than student count in Appointment Stats?</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Author Name</td>
<td>Name of staff member who created a note in Navigate</td>
<td>Navigate Notes Feature</td>
</tr>
<tr>
<td>Auto Check Out</td>
<td>True/false indicator if a student's study hall time had an auto-check out or not</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Available Times</td>
<td>Start and end time for a staff member's availability spot</td>
<td>Navigate Availability feature</td>
</tr>
<tr>
<td>Average Duration</td>
<td>Average duration (in minutes) of appointments for the student service in the associated care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Begin Date Time</td>
<td>Date and time for the beginning of an appointment (when staff starts appt?)</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Calendar Instance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calendar Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campaign</td>
<td>Name of campaign a case is associated with, if any</td>
<td>Navigate Cases feature</td>
</tr>
<tr>
<td>Cancellation Comment</td>
<td>Optional text field for person who does cancellation to fill in comment about cancellation</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Cancellation Date</td>
<td>Date of student cancellation of an appointment</td>
<td>Navigate scheduling functionality</td>
</tr>
<tr>
<td>Cancellation Reason</td>
<td>Optional list option to explain reason for cancellation</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Cancelled Count</td>
<td>Number of cancelled appointments for single staff member in a care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Care Unit</td>
<td>Name of the care unit associated with the entity. This could be an appointment, an appointment cancellation, a staff member, or an availability</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Categories</td>
<td>Navigate categories the student has been assigned to</td>
<td>SIS/Institutional data import and Navigate configurations</td>
</tr>
</tbody>
</table>
# Navigate Reporting: Fields

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category List</td>
<td>List of categories student belongs to</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Cell Phone (Staff)</td>
<td>Cell phone number of associated staff member</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Cell Phone (Student)</td>
<td>Student cell phone number</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Charity Time</td>
<td>True/False indicator if a student's study hall log is charity time or not</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Check In Date</td>
<td>Date and time a student checked in to a student service (study hall, kiosk, appointments)</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Check In Location</td>
<td>Location student checked into for a student service (study hall, tutoring, appointments)</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Check Out Date</td>
<td>Date and time a student checked out of a student service (study hall, kiosk, appointments)</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Check Out Location</td>
<td>Location student checked out of for a student service (study hall, tutoring, appointments)</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Checked Out From Profile</td>
<td></td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Checked Out From Report</td>
<td></td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>City</td>
<td>Student address city</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Class</td>
<td>Same as classification (freshman, sophomore, etc)</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Class Ends At</td>
<td>Time the class ends</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Class Starts At</td>
<td>Time the class starts</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Class Times</td>
<td>Time and day a class meets for a term</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Classes Taught</td>
<td>Number of classes an individual faculty member teaches in the term</td>
<td>Institutional data import</td>
</tr>
<tr>
<td>Classifications</td>
<td>Student classification (e.g. freshman, sophomore)</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Closed At</td>
<td>Date case was closed</td>
<td>Navigate Cases feature</td>
</tr>
<tr>
<td>Closed By</td>
<td>Staff member who closed the case</td>
<td>Navigate Cases feature</td>
</tr>
<tr>
<td>Closed Reason</td>
<td>Reason a case was closed</td>
<td>Navigate Cases feature</td>
</tr>
<tr>
<td>Comment</td>
<td>Optional comment made by faculty member who filled out a progress report on student</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Completed</td>
<td>Clicking this link shows the details of a student progress report</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Completed At</td>
<td>Date assignment was completed</td>
<td>Navigate Manage Assignments feature</td>
</tr>
<tr>
<td>Completed By</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completed On Time</td>
<td>Y/N field, indicates if student assignment was turned in on time</td>
<td>Navigate Manage Assignments feature</td>
</tr>
<tr>
<td>Counted as No Show</td>
<td>Y/N field, indicates if student is counted as a no-show to an appointment</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Course</td>
<td>Course Name</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Course Dropped At</td>
<td>Date when student dropped the associated course</td>
<td>SIS/Institutional data import</td>
</tr>
</tbody>
</table>
# Navigate Reporting: Fields

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Name</td>
<td>Name of the course. Same as &quot;Course&quot;</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Course Number</td>
<td>Course number from the catalog</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Course Time</td>
<td>Date and time of single instance of the course</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Courses</td>
<td>If a course is associated with staff member availability, this field lists the courses associated with that availability</td>
<td>Navigate Availabilities feature</td>
</tr>
<tr>
<td>Created At</td>
<td>Refers to date several items in platform were created</td>
<td>Navigate Notes, Appointment Requests, Appointments</td>
</tr>
<tr>
<td>Creator Name</td>
<td>Staff member who created travel letter</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Cumulative GPA</td>
<td>Student's cumulative GPA</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Student date of birth</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Date of the Appointment</td>
<td>Calendar date of the appointment with the student</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Date Submitted</td>
<td>Date a staff member-generated entity like a progress report or Appointment Summary Report, was submitted for a student</td>
<td>Appointment Summary Reports, Progress Reports</td>
</tr>
<tr>
<td>Days</td>
<td>Days of the week of the availability slot</td>
<td>Navigate Availabilities feature</td>
</tr>
<tr>
<td>Departed At</td>
<td>Time student left the appointment</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Description</td>
<td>Text field to describe a student assignment</td>
<td>Navigate Manage Assignments feature</td>
</tr>
<tr>
<td>Did Attend</td>
<td>Y/N field, indicates if the student attended an appointment</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Dropped Courses</td>
<td>Count of courses dropped for a term</td>
<td></td>
</tr>
<tr>
<td>Dropped?</td>
<td>Y/N field, indicates if student dropped a course</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Due At</td>
<td>Date a student assignment is due</td>
<td>Navigate Manage Assignments feature</td>
</tr>
<tr>
<td>Duration</td>
<td>Length in minutes for an appointment slot a student has made an appointment for</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Duration (Availabilities)</td>
<td>Length in minutes for an availability slot</td>
<td>Navigate Availabilities feature</td>
</tr>
<tr>
<td>Elapsed</td>
<td>Time a checked-in student has spent in study hall so far</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Email Address</td>
<td>Same as Student Email</td>
<td></td>
</tr>
<tr>
<td>Email Sent Count</td>
<td>Count of emails sent through Navigate platform during the selected time period for an individual staff member</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>End Date Time</td>
<td>Date and time for the end of an appointment (when staff ends it?)</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Ends On</td>
<td>Date a class ends in the selected term</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Enrolled Courses</td>
<td>Count of courses a student enrolled in for the term</td>
<td></td>
</tr>
<tr>
<td>Enrollment Count</td>
<td>Number of students enrolled in the section</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Enrollment Goal</td>
<td></td>
<td>Don't know</td>
</tr>
</tbody>
</table>
## Navigate Reporting: Fields

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Student ethnicity</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Evaluation Count</td>
<td>Count of how many Appointment Summary Reports were filed for a single staff member in a single care unit</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Evaluation Created By</td>
<td>Name of staff member who created the progress report in Navigate</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Excused Absences</td>
<td>Count of excused student absences</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Excused?</td>
<td>Y/N field, indicates if absence was excused</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Final Grade</td>
<td>Final grade in a course</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>First Name</td>
<td>First name of the student</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Follow-Up?</td>
<td>Y/N field, indicates if the appointment was a follow-up</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>From Campaign</td>
<td>Y/N field, indicates if at-risk flagging was due to a Progress Report campaign or not</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Gender</td>
<td>Gender of the student (same as the sex of the student)</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Grade</td>
<td>Student's overall grade in a class, as submitted through a progress report</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Had Appointment</td>
<td>Y/N field, indicates if the student had scheduled an appointment</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Home Phone</td>
<td>Student's home phone number</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Hours</td>
<td></td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Instructor</td>
<td>Name or ID of the instructor teaching a class</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Instructor Email</td>
<td>Email address of instructor teaching a class</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Instructor Name</td>
<td>Name of instructor teaching a class</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Is Active</td>
<td>Y/N field, indicates if an availability is active</td>
<td>Navigate Availabilities feature</td>
</tr>
<tr>
<td>Is Matched</td>
<td>Y/N field, indicates if appointment request was matched</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Is No Show?</td>
<td>Y/N field, indicates if student no-showed to a scheduled appointment</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Is Report Filed?</td>
<td>Y/N field, indicates if an Appointment Summary Report has been filed</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Issued By</td>
<td>Staff member who issued an alert on a student</td>
<td>Navigate Issue Alert Feature</td>
</tr>
<tr>
<td>Last Day of Attendance</td>
<td>The last date of student attendance for a class based on Enrollment Census reports</td>
<td>Enrollment Census submissions</td>
</tr>
<tr>
<td>Last Name</td>
<td>Student last name</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Location</td>
<td>Location of a course, appointment, or availability</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Logged Time</td>
<td>Time logged in appointments, using TK to determine the logged time</td>
<td></td>
</tr>
</tbody>
</table>
# Navigate Reporting: Fields

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Longest Duration</td>
<td>Longest appointment duration for a student service within a care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Major</td>
<td>Student major or majors</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Matched At</td>
<td>Date and time a student appointment request was matched by a staff member</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Matched By</td>
<td>Staff member who matched an appointment request made by a student</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Meeting Times</td>
<td>Times requested by a student in an appointment request</td>
<td>Navigate scheduling functionality</td>
</tr>
<tr>
<td>Meeting Type</td>
<td>Type of meeting, as selected from Appointment Summary Report options</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Meets</td>
<td>Day(s) of the week the course meets</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Midterm Grade</td>
<td>Student's midterm grade (usually recorded for Progress Report)</td>
<td></td>
</tr>
<tr>
<td>Minutes per Week</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Student classification (e.g. freshman, sophomore)</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>No Show Count</td>
<td>Count of how many appointments were no-shows for a single staff member in a single care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Note</td>
<td>Title of a note in the Navigate SSMS</td>
<td>Navigate Notes Feature</td>
</tr>
<tr>
<td>Note Reasons</td>
<td>Reasons selected when staff creates a note in Navigate</td>
<td>Navigate Notes Feature</td>
</tr>
<tr>
<td>Number of Absences</td>
<td>Count of absences recorded for the student</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Number of Appointment Requests</td>
<td>Number of appointment requests made for a course</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Number of Appointments</td>
<td>Total number of appointments made per Student Service in a care unit</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Open</td>
<td>Y/N field, indicates if the case is open</td>
<td>Navigate Cases feature</td>
</tr>
<tr>
<td>Organizer Cell Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizer Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizer External</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizer Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizer Work Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall GPA</td>
<td>Student's cumulative GPA</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Percentage of Appointments</td>
<td>Percentage of total appointments appointments for this reason/service in the care unit represent</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Percentage of Cancelled</td>
<td>The percentage a single reason within a care unit represents of total cancellations in the care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Appointments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Call Count</td>
<td>Count of phone calls a staff member made that were recorded in the platform during the selected time period</td>
<td></td>
</tr>
<tr>
<td>Points Available</td>
<td>Highest possible number of points a student could score on an assignment</td>
<td>Navigate Manage Assignments feature</td>
</tr>
</tbody>
</table>
# Navigate Reporting: Fields

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Points Received</td>
<td>Number of points received by the student for the assignment</td>
<td>Navigate Manage Assignments feature</td>
</tr>
<tr>
<td>Professor Comments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professor's Email</td>
<td>Email of the professor/faculty member associated with a course</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Professor's Name</td>
<td>Name of the professor/faculty member associated with a course</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Progress Report Created</td>
<td>Date a progress report evaluation on a student was created</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Projected Grade</td>
<td>Student's projected grade in the course, based on progress report entry</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Purpose</td>
<td>Indicates type of availability - scheduled appointments, drop-in, or campaign</td>
<td>Navigate Availabilities feature</td>
</tr>
<tr>
<td>Q1-Q10</td>
<td>Answers for questions 1-10 in an Appointment Summary Report</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Race</td>
<td>Student race</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Reason</td>
<td>Student service associated with appointments in a care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Recorded</td>
<td>Attendance status for the class</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Recorded Cancellations</td>
<td>Count of cancelled appointments for a specific reason within a single care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Remaining</td>
<td>Remaining required time for a student's study hall requirement</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Remaining Time</td>
<td>Remaining required time for a student's study hall requirement</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Report Summary</td>
<td>Student Appointment Summary Report summary</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Reported Course</td>
<td>Name of course if there is a course related to an appointment in the Appointment Summary Report</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Reported Course Name</td>
<td>Name of course if there is a course related to an appointment in the Appointment Summary Report</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Reported Course Number</td>
<td>Course number if there is a course related to an appointment in the Appointment Summary Report</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Reported Duration</td>
<td>Length of an appointment as noted in the Appointment Summary Report(?)</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Reported Reasons</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Care Unit</td>
<td>Care Unit the requested appointment request comes from</td>
<td>Navigate scheduling functionality</td>
</tr>
<tr>
<td>Requested By</td>
<td>Name of student who requested the appointment</td>
<td>Navigate scheduling functionality</td>
</tr>
<tr>
<td>Required</td>
<td>Required study hall time for a student overall</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Required Time for Date Range</td>
<td>Time in hours and minutes required in the time range for study hall for a student</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Required Time Per Week</td>
<td>Time required in study hall for the student per week</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Response</td>
<td>Y/N field, indicates if the progress report for a student was requested by an administrator</td>
<td>Navigate Progress Reports</td>
</tr>
<tr>
<td>Scheduled</td>
<td>Count of how many appointments were scheduled for a single advisor in a single care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
</tbody>
</table>
### Navigate Reporting: Fields

<table>
<thead>
<tr>
<th><strong>Column Name</strong></th>
<th><strong>Column Description</strong></th>
<th><strong>Source</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Course Name</td>
<td>If an appointment is a course-based one, the course the student scheduled for</td>
<td>SIS/Institutional data import and Navigate configurations</td>
</tr>
<tr>
<td>Scheduled Course Number</td>
<td>If an appointment is a course-based one, the course number the student scheduled for</td>
<td>SIS/Institutional data import and Navigate configurations</td>
</tr>
<tr>
<td>Scheduled Duration</td>
<td>Scheduled appointment length</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Section</td>
<td>Name of section (instances of a course)</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Section External ID</td>
<td>How the section of a course is identified externally</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Section Name</td>
<td>Name of section (instances of a course)</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Service</td>
<td>Student Service</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Sex</td>
<td>Sex of the student, same as gender</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Shortest Duration</td>
<td>Shortest appointment duration for a student service within a care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Sms Sent Count</td>
<td>Count of SMS initiated by the staff member in the platform during the selected time range</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Staff Email</td>
<td>Email of a staff member</td>
<td>Institutional data import</td>
</tr>
<tr>
<td>Staff Member</td>
<td>Name of staff member</td>
<td>Institutional data import</td>
</tr>
<tr>
<td>Staff Name</td>
<td>Name of a staff member</td>
<td>Institutional data import</td>
</tr>
<tr>
<td>Starts On</td>
<td>Date class starts in selected enrollment term</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>State</td>
<td>Student address state</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Student</td>
<td>Student's full name, same as Student Name</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Student Attended</td>
<td>Y/N field, indicates if student attended an appointment related to class with progress report</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Student Count</td>
<td>Count of distinct individual students who attended an appointment with a staff member in a specific care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Student Email</td>
<td>Primary email address associated with the student</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Student ID</td>
<td>Student ID number</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Student Name</td>
<td>Student full name</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Student Phone</td>
<td>Student phone number</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Student Primary (ID)</td>
<td>Student ID number, same as &quot;Student ID&quot; and &quot;Student Primary&quot;</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Student Services</td>
<td>Student service(s) a staff member is available for</td>
<td>Navigate Availabilities feature</td>
</tr>
<tr>
<td>Summary</td>
<td>Text field for comments about a student appointment</td>
<td>Navigate Appointment Summary Reports</td>
</tr>
<tr>
<td>Tags</td>
<td>Tags added to the student in Navigate</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Term Credit Hours</td>
<td>Not sure this is different from Term Credits</td>
<td></td>
</tr>
</tbody>
</table>
# Navigate Reporting: Fields

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Column Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term Credits</td>
<td>Number of credits being taken in a term</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Term GPA</td>
<td>Student GPA for the term selected</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>This Week</td>
<td>Hours spent in study hall this week by a student</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Total Absences</td>
<td>Count of excused and unexecused student absences</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Total Class Absences</td>
<td>Total absences (excused + unexcused) for a student in a class</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Total Class Excused</td>
<td>Total class excused absences for a student</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Total Credit Hours Earned</td>
<td>Total credit hours earned by the student</td>
<td>SIS/Institutional data import</td>
</tr>
<tr>
<td>Total Evaluations</td>
<td>Total number of progress reports for a student in the time range</td>
<td>Progress Reports</td>
</tr>
<tr>
<td>Total Excused</td>
<td>Count of excused absences per student</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Total Time</td>
<td>Total time spent in study hall</td>
<td>Navigate Study Hall features</td>
</tr>
<tr>
<td>Total Time (in minutes)</td>
<td>Total charity time (in minutes) given to a student</td>
<td>Navigate SSMS</td>
</tr>
<tr>
<td>Travel Letter</td>
<td>Indicates if there is a travel letter associated with a student absence</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Unexcused Absence Count</td>
<td>Count of unexcused student absences</td>
<td>Navigate Record Attendance Feature</td>
</tr>
<tr>
<td>Unused Slots</td>
<td>Number of attendance slots that were not used in an appointment in the selected date range for a single staff member in a single care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>View Note</td>
<td>Link to allow user to view the actual note recorded</td>
<td>Navigate Notes Feature</td>
</tr>
<tr>
<td>Visit Created At</td>
<td>Date/time the visit was created</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Visit Modified At</td>
<td>Time the visit state was last modified at</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Visit State</td>
<td>The status of a visit (e.g. the queue the visit/appointment is in)</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Walkins</td>
<td>Count of walk-in appointments for a single staff member in a distinct care unit</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Was Cancelled</td>
<td>Y/N field, indicates if an appointment was canceled</td>
<td>Navigate Appointment functionality</td>
</tr>
<tr>
<td>Weight</td>
<td>The weight of the assignment toward the final grade in a course</td>
<td>Navigate Manage Assignments feature</td>
</tr>
<tr>
<td>Work Phone</td>
<td>Faculty member's phone number</td>
<td>LDAP/Institutional data upload</td>
</tr>
<tr>
<td>Zip</td>
<td>Student ZIP code</td>
<td>SIS/Institutional data import</td>
</tr>
</tbody>
</table>