REPORTS
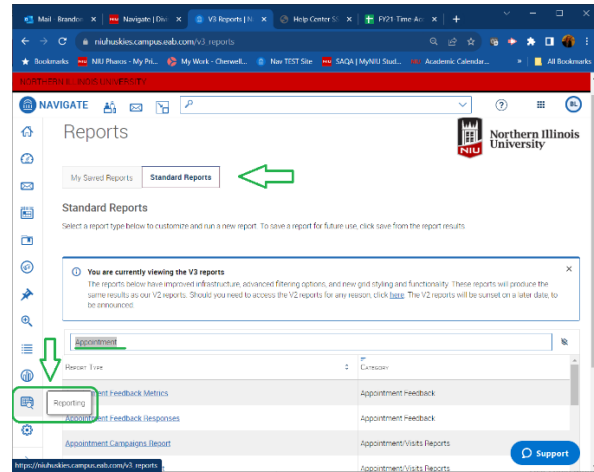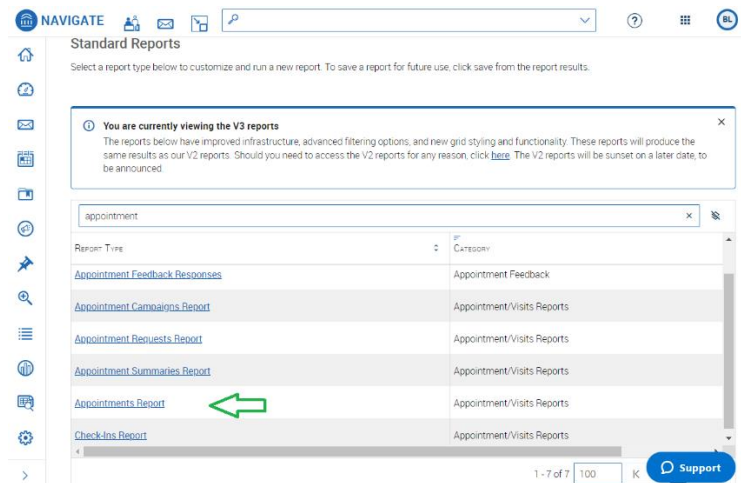

Locate a Report Type.

☐ Click on the **Reporting** icon in Navigate Staff.

☐ Select the **Standard Reports** tab.

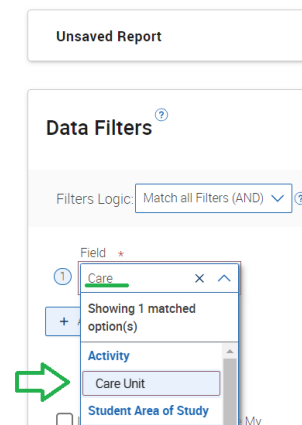☐ In the **Search in Results** box type a few words to describe the type of report you seek (e.g., appointment).

☐ 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.

☐ In the first filter, type **Care Unit** into the first search field box.

☐ Select the **Care Unit** option from the drop-down menu.

Tailor Your Report With Data Filters.

❑ 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.

Accessing Your Report Results.

❑ As the report runs, the button will appear as 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.)