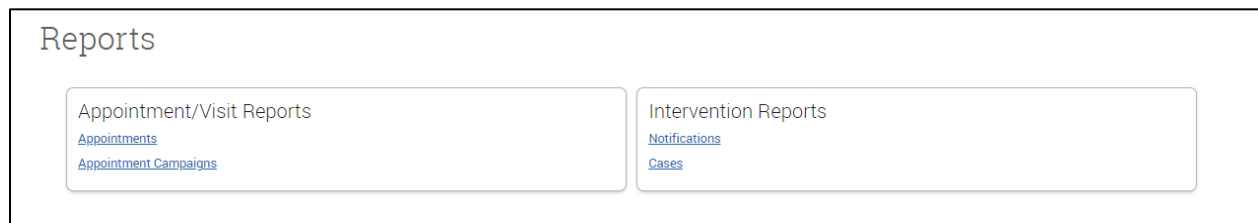# Reports for Advisors

CCNY Navigate has several preloaded reports that allow advisors access to student-level data contained in the platform. Users use the Advanced Search interface to identify which students to include in the report Advisors have access to the following reports:

Reports

Appointment/Visit Reports	Intervention Reports
Appointments	Notifications
Appointment Campaigns	Cases

- **Appointments:** This report shows any appointment created by a user in Navigate. A single row in the Appointments Report represents a single appointment instance with the Appointment Date within the date range chosen. If the appointment instance is a group appointment, you see a single row per student in the appointment.
- **Appointment Campaigns:** This report shows all Appointment Campaign requests and response information for a Care Unit. A single row represents a single appointment campaign request per student.
- **Notifications (Alerts in EAB documentation):** The Notifications report includes any user-created alert associated with the Navigate platform, along with associated details. This covers alerts created by campaigns or ad-hoc alerts. A single row represents a single alert instance within the selected date range.
- **Cases:** This report shows any Case created by a Navigate user and the associated details. The Cases report allows you to learn about open or closed cases at your institution, including who opened the case, who is assigned to the case, and the Case Closed Reason.

While the reports themselves are extremely helpful, the following actions make them even more helpful:
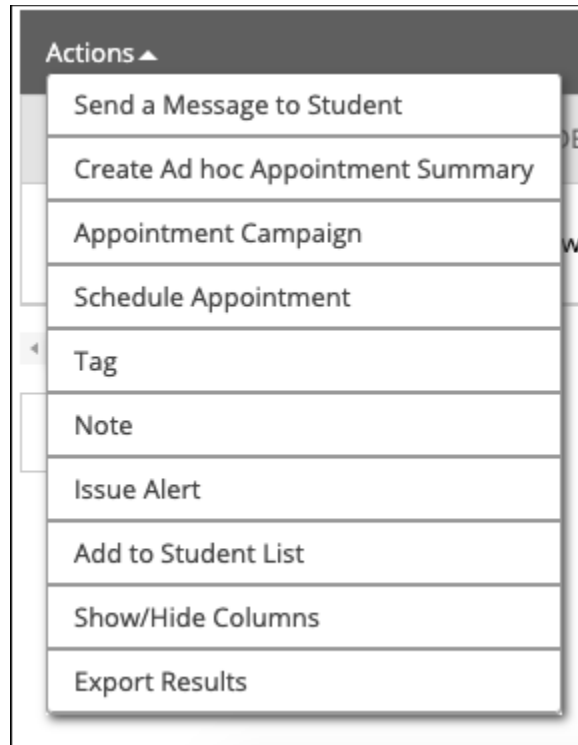
- **Action Menu:** Users can act on any report by opening the Actions menu in the report results.
    - o Send a Message: Sends a message to the students selected by email or text.
    - o Tag: Adds a tag to the students selected.
    - o Note: Adds a note to the students selected.
    - o Add Ad-hoc Appointment Summary: Opens an Appointment Summary Report for the students selected.
    - o Appointment Campaign: Creates an Appointment Campaign using the selected students.
    - o Schedule Appointment: Creates an Appointment between the students and the person who ran the report.
    - o Add to Student List: Adds the selected students to a Student List.
    - o Show/Hide Columns: Lets the user choose the columns to show in the report results and export.
    - o Export Results: Exports the report results to a CSV file. If you have hidden columns, the export maintains those choices.
- **Saving Reports:** Saved Reports give Navigate staff users the ability to save student and activity filters for a particular report to which they have access, much like a Saved Search. This allows users to re-run the search quickly and efficiently without having to reselect the filters each time they access the report.

- **Scheduling Reports:** Once you save a report, you can then schedule it to be rerun. This functionality is on the Lists & Searches tab. When you navigate to the Saved Reports table, you can click Configure Schedule to schedule a report. Reports can be scheduled to be delivered daily, weekly, or monthly. You can only create one schedule per Saved Report; for example, you cannot create a schedule that sends notifications on Monday and Wednesday weekly.