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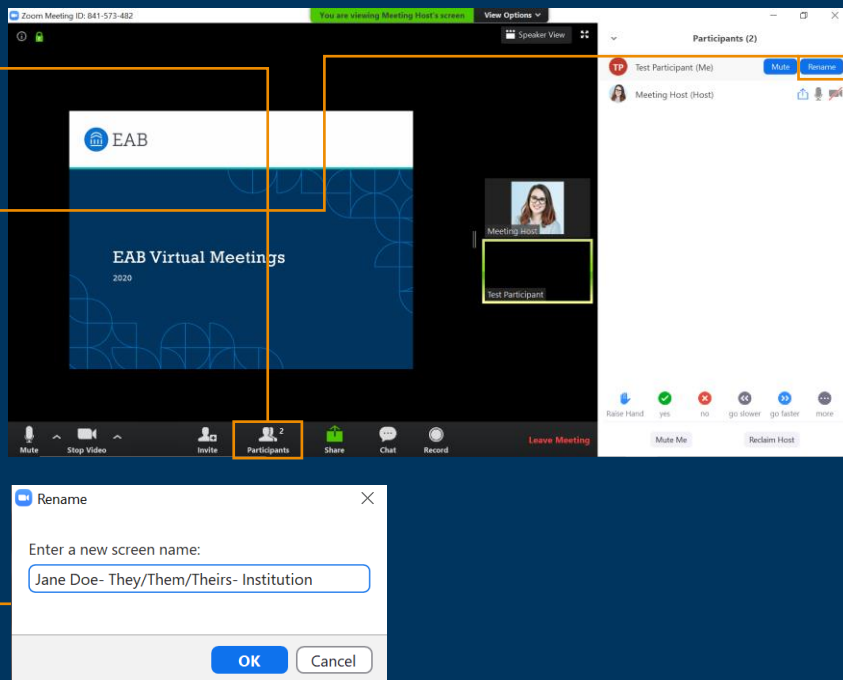
Reports & Analytics

March Feature Spotlight

Update Your Name and Include Your Institution

Update Your Name

- Click **Participants** in your menu bar.
- On the right side of the screen, hover over your name, click more, and then click **Rename**.
- Add a dash and your institution name. You may also add your pronouns if you wish (example: they/them/theirs)



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Part I: Basics

- What are Reports? What are Analytics?
- What Reports can I access in Navigate?
- What tools can I use within Reports?
- Sample metrics available in Reports

2

Part II: Advanced

- Sample analysis powered by Reports & Analytics

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Part III: Resources, Next Steps

Today's Presenters



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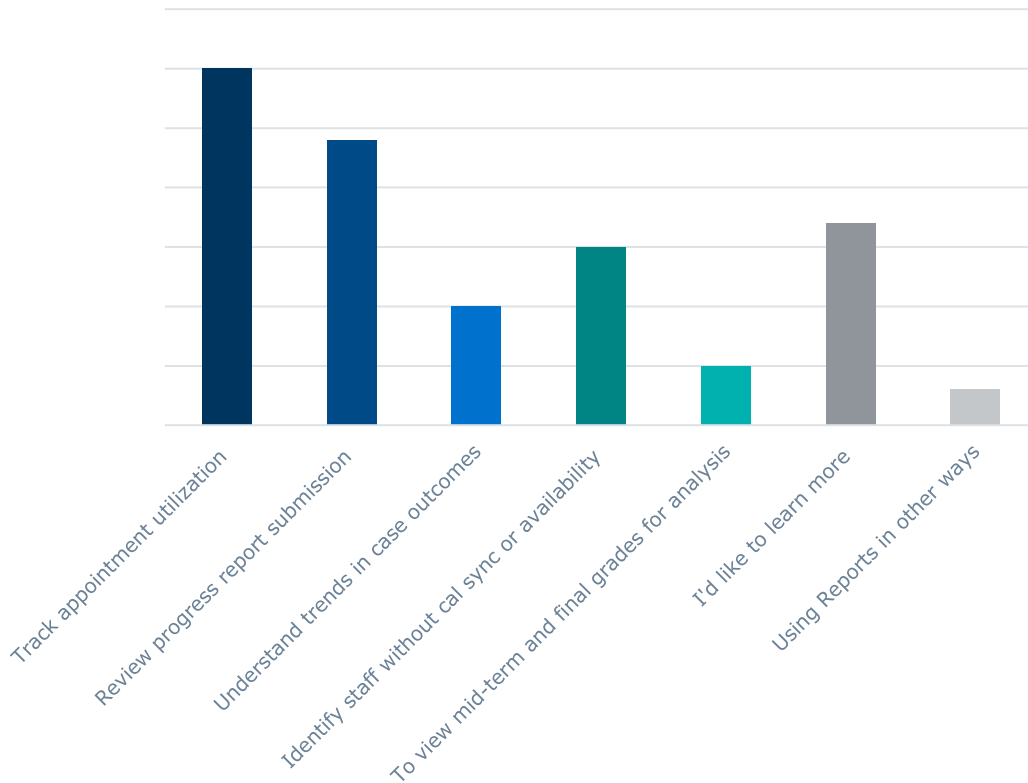
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How are you using Navigate Reports?



Thank you to all who took our poll!





About Reports – Back to Basics



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Reports vs. Analytics

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Reports

- ❑ Use to dive deep into data

Appointment/Visit Reports

Appointments
Appointment Summaries
Appointment Requests
Appointment Campaigns
Check-Ins

Intervention Reports

Alerts
Cases
Progress Reports
Progress Report Campaigns
Enrollment Census

Student Data Reports

Notes
Assignments
Attendance
Study Hall
Student Enrollments
Student Info (Students Active for Term)



Analytics

- ❑ Use to identify trends

Population Health Analytics

Assess the health of selected student populations and identify intervention opportunities using key academic performance metrics like GPA and credit completion.

Population Health Dashboard

Risk by College & Program (formerly Institution Analytics)

Intervention Effectiveness

Activity Analytics

Track student and staff activity for better accountability and resource planning using visualizations of how and when staff time is being spent.

Activity Dashboard

Activity Reports

Student Behavioral Analytics

Navigate Reports & Analytics power timed insights that can be translated into action over the course of a semester

A list of all Reports & Analytics



Reports

- ☐ Appointments Report
- ☐ Appointment Summaries Report
- ☐ Appointment Requests Report
- ☐ Appointment Campaigns Report
- ☐ Check-Ins Report
- ☐ Alerts Report
- ☐ Cases Report
- ☐ Progress Reports Report
- ☐ Progress Report Campaigns Report
- ☐ Enrollment Census Report
- ☐ Notes Report
- ☐ Assignments Report
- ☐ Attendance Report
- ☐ Study Hall Report
- ☐ Student Enrollments Report
- ☐ Student Info (Students Active For Term) Report
- ☐ Availabilities Report
- ☐ Calendar Statistics Report

Analytics

- ☐ Population Health Dashboard
- ☐ Activity Dashboard
- ☐ Student Milestone Dashboard
- ☐ Academic Planning Dashboard
- ☐ Survey Analytics Dashboard
- ☐ Institution Reports
- ☐ Intervention Effectiveness Tool
- ☐ Student Information Reports



Use the Spreadsheet icon
to access Reports



Use the Graph icon to
access Analytics Tools

Reports Overview

Use the Spreadsheet icon to access Reports features



Reports

Appointment/Visit Reports

Appointments

Appointment Summaries

Appointment Requests

Appointment Campaigns

Check-Ins

1

Intervention Reports

Alerts

Cases

Progress Reports

Progress Report Campaigns

Enrollment Census

2

Student Data Reports

Notes

Assignments

Attendance

Study Hall

Student Enrollments

Student Info (Students Active
for Term)

3

Staff Reports

Availabilities

Calendar Statistics

4



Clicking into a Report, what do you see?

1. Report Information

Click the carrot to learn more about this report

Report Information

Description

Report mode: Appointments - will show any appointment created by a user within the platform. To clarify, in Navigate an 'appointment' can be either a scheduled or drop-in interaction with a student.

Report mode: Without Appointments - will show any student without an appointment with the specified criteria.

What a row represents

Report mode: Appointments - A single row represents a single appointment instance with the Appointment Date within the date range chosen. If the appointment instance is a group appointment, you will see a single row per student in the appointment. For a student to be returned in the report, the student must be active in the term(s) selected. If no terms are selected, you will retrieve all students active in any term with any appointments in the date range chosen

Report mode: Without Appointments - A single row represents a single student that has not had an appointment with the criteria selected.

What permissions are required for data access

The data returned in the report is Care Unit specific. To access the data, the user must have a role with access to a given care unit and the ability to view Appointments within that Care Unit.



Report Information Includes:

- Description
- What a row represents
- Permissions required for data access

Clicking into a Report, what do you see?

1. Report Information Cont.

Report Information

Description

Report mode: Appointments - will show any

Report mode: Without Appointments - will s

What a row represents

Report mode: Appointments - A single row r
a single row per student in the appointment
term with any appointments in the date ran

Report mode: Without Appointments - A sin

What permissions are required for data acc

The data returned in the report is Care Unit :

COLUMN	END USER DEFINITION
care unit	name of care unit on appointment
scheduled services	alphabetized list of services appointment was scheduled for
scheduled course name	course appointment was scheduled for
scheduled course number	course number appointment was scheduled for
location	location appointment was scheduled for
appointment start date	date appointment starts
appointment start time	time appointment starts
scheduled duration (in min)	duration (in minutes) appointment was scheuled for
appointment created at	what date and time was the appointment created
appointment created by	who created the appointment
attendance created by	user who added themselves into the appointment after it's initial creation
attendance created at	what date and time the user added themselves into the appointment
appointment comment	comments added within the appointment
associated with campaign (yes / no)	is the appointment associated with a campaign
appt campaign name	if the appointment was created from an appointment campaign, this is the name of that campaign
staff organizer name	this is the staff user that is managing this appointment
staff organizer id	this is the staff user's id that is managing this appointment
staff organizer email	this is the staff user's email that is managing this appointment
check in date	this is the date that the student checked in for the appointment. this field will be populated if the student checked in via kiosk or appointment center
check in time	this is the time that the student checked in for the appointment. this field will be populated if the student checked in via kiosk or appointment center
check out date	this is the date that the student checked out for the appointment. this field will be populated if the student checked in via kiosk or appointment center
check out time	this is the time that the student checked out for the appointment. this field will be populated if the student checked in via kiosk or appointment center
group appointment? (yes / no)	is the appointment a group appointment
total slots in appointment	how many total slots are available within the appointment
total slots remaining in appointment	how many total slots are remaining within the appointment
cancelled? (yes / no)	was the appointment cancelled
cancellation reason	if the appointment is cancelled, this field will show the reason that the appointment was cancelled
cancellation comment	if the appointment is cancelled, this field will show the comment withing the appointment cancellation
cancelled by	if the appointment is cancelled, this field will show who cancelled the appointment
late cancel no show? (yes / no)	if the student cancels within the specified time on the location settings, the student will automatically be marked as a no show. if this is true, this field will show "yes"
summary report filed? (yes / no)	if the appointment has an appointment summary filed, this will show "yes"
date summary submitted	if an appointment summary has been created for this appointment, this field will show the date in which it was created

Clicking into a Report, what do you see?

2. Activity Filters

Activity Filters

Begin Date 03/05/2021	End Date 03/12/2021		
Report Mode ⓘ Appointments			
Care Units All	Team: All	Organizer for Appointment: All	Appointment Campaigns: All
Filter by Location All			
Filter by Service All			
☒ Include Cancelled Appointments ☒ Include No Shows ☐ Report Filed Only ☐ Campaign Appointments Only			

Activity Filters Include

- Begin Date & End Date
- Filters pertinent for that specific report

Clicking into a Report, what do you see?

3. Student Filters

Student Filters

Student Information	First Name, Last Name, Student ID, Category, Tag, Gender, Race, Student List	▼
Enrollment History	Enrollment Terms	▼
Area of Study	College/School, Degree, Concentration, Major	▼
Term Data	Classification, Section Tag, Term GPA	▼
Performance Data	GPA, Hours, Credits	▲

Min. Cumulative GPA [?]	Max. Cumulative GPA [?]	Min. Overall GPA [?]	Max. Overall GPA [?]	Min. High-School GPA [?]	Max. High-School GPA [?]
0.00	5.00	0.00	5.00	0.00	5.00
Min. Credits Earned [?]	Max. Credits Earned [?]	Min. Hours Attempted [?]	Max. Hours Attempted [?]	Min. Credit Comp. % [?]	Max. Credit Comp. % [?]
0	999	0	999	0	100

- Go from an aggregate understanding of campus population to a more niche population
- Layer Navigate data on advanced search data

Clicking into a Report, what do you see?

4. Actions

Search

Modify Search

Actions ^

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Issue Alert
- Add to Student List
- Show/Hide Columns
- Export Results

	E-MAIL	STUDENT ID	STUDENT ALTERNATE ID	CATEGORIES	TAGS
	ppport.onmicrosoft.com				EP Tag 1200,n Test 2 - Tags,S Test,students - 007 - Test
	ppport.onmicrosoft.com				EP Tag 1200,n Test 2 - Tags,S Test,students - 007 - Test
	ppport.onmicrosoft.com				EP Tag 1200,n Test 2 - Tags,S Test,students - 007 - Test
4. ☐ Lee, Judy	jlee@eabsupport.onmicrosoft.com				EP Tag 1200,n Test 2 - Tags,S Test,students



Highlighting Sample Reports & Use-Cases



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Use Student Lists to layer Reports results with other tools

EXAMPLE:

- Use Appointments Report to find **Students Without Appointments**
- Save your results as a **Student List**



Staff Home

Easily view students without appointments on your home screen



Other Reports

Find students without appointments who have more than 3 alerts issued this current term

Actions ^	
Send a Message to Student	
Create Ad hoc Appointment Summary	
Appointment Campaign	
Schedule Appointment	
Tag	
Note	
Issue Alert	
Add to Student List	
Show/Hide Columns	
Export Results	



Advanced Search

Search for students without appointments who are English majors whose GPA is between 2.0-3.0



Intervention Effectiveness

Find difference in retention rates between students without appointments and overall population

Highlight: Appointments Report



5 Data Points You Can Find:

1. Students with appointments in a term
2. Students without appointments in a term →
3. Number of cancellations in a term
4. Number of no-shows in a term
5. Total Number of Appointments in a Term →

Use your insights to take action...



Send a campaign

Send a campaign to your Financial Aid recipients who have not yet scheduled an appointment

Answer a Question

Did the number of appointments in the Tutoring Care Unit go up after we trained our tutors this term?

FAQ: When should I use activity analytics vs. appointments report?

- Appointment Reports – Micro
- Activity Reports - Meso
- Activity Analytics – Macro

Highlight: Alerts Report, Progress Reports Report



5 Data Points You Can Find

1. Students with a specific alert reason issued →
2. Professors who submitted Progress Reports
3. Number of Progress Reports submitted per course
4. Students with a reported grade of D/F
5. Number of students marked 'At Risk' →

Use your insights to take action...

Answer a Question

What percentage of students with alert reason 'Referral to Tutoring' scheduled an Appointment through a Tutoring campaign?

Uses Student List layering trick

Answer a Question

What percentage of students in high DFW courses were marked 'At-Risk' at week 4? Week 8?

FAQ: When should I use Alerts Report vs. Progress Reports Report?

- Alerts = Information about each individual alert submitted through Navigate
- Progress Reports Report = Alert information bundled by each Progress Report

Highlight: Student Enrollments



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5 Data Points You Can Find:

1. Mid-Term Grades by Course
2. Final Grades by Course →
3. Number of Absences by Course
4. Pass rates by Course
5. Drop Rates by Course →

Assist Degree Planning Conversations

Find students who are taking courses Pass/Fail (based on grading scheme) and talk to students about what this means for their degree plan and graduation

Answer a Question

What percentage of students who dropped a key course re-enrolled the following term?

What Other Metrics Can be Measured?

Consider All Three Types of Metrics to Evaluate Impact

Ultimate Metrics of Success

**Average Time
and Cost to
Degree**

**Retention,
Persistence, and
Graduation
Rates**

**Achievement
Gap for Key
Populations**

**Summer
Melt**

Outcome Metrics

Student Performance

- GPA or Academic Standing
- Avg grade, DFW rates
- Midterm to final grade changes

Student Progress

- Credits attempted, earned, and completion %
- Major changes

Enrollment

- Registration, re-enrollments
- Application yield
- Earlier registration, holds cleared

Other

- Applications to graduate
- Staff or student time savings and satisfaction

Process Metrics

Appt. Activity

- Total appts., appt. per student
- No-show or cancellation rates
- Summary reports filed

Interventions

- Students contacted
- Scheduled and completed appts
- Completed actions
- Increased use of support services

Case Management

- Progress Report response rates
- Alerts issued
- Cases opened and closed

Student Adoption

- Mobile app adoption and utilization
- Completed to-dos
- Appts scheduled by students



Evaluating Impact through Intervention Effectiveness



4

Use Reports to generate answers



Then turn answers into insights and action

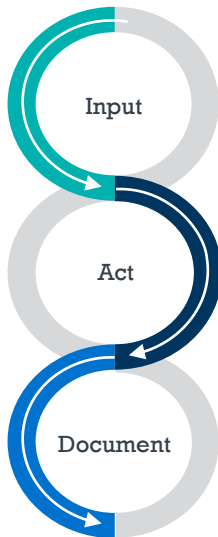


- 1 Start with a Question
- 2 Use Reports to pull metrics
- 3 Identify key insights by manipulating Report data in Excel
- 4 Use Intervention Effectiveness Tool to evaluate processes
- 5 Adjust processes based on evaluations, Execute through Navigate

Example: Start with a question...



Have my outreach efforts been effective for students this term?



Alerts submitted for students at-risk to fail class
Case is opened and assigned



Case assignee reaches out to students with alerts for advisement
Notes are documented in Case



Cases are closed once complete

- Case Closed Reason 1: Student took recommended action
- Case Closed Reason 2: Student contacted 3x, No Response

Pull Cases Report Filtered by Closed Reason

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List 1:
Students with Case Closed Reason 'Student took recommended action' this term

Activity Filters

Begin Date 01/08/2021	End Date 05/21/2021	Care Units All	
Alert Reasons All	Opened By All	Case Assignee All	
Closed Reasons Student took recommended action	Case Status No Preference		

List 2:
Students with Case Closed Reason 'Student contacted 3x, no response' this term

Activity Filters

Begin Date 01/08/2021	End Date 05/21/2021	Care Units All	
Alert Reasons All	Opened By All	Case Assignee All	
Closed Reasons Student contacted 3x, no response	Case Status No Preference		

Save Results as Student Lists

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Actions ▲

- Send a Message to Student
- Create Ad hoc Appointment Summary
- Appointment Campaign
- Schedule Appointment
- Tag
- Note
- Issue Alert
- Delete Case(s)
- Add to Student List
- Show/Hide Columns
- Export Results

ADD TO STUDENT LIST

☒ Initials, Date, Description

[Create new list...](#)

Cancel Save

ADD TO STUDENT LIST

☒ RQ, 21, Took Rec Action

[Create new list...](#)

Cancel Save

Set Up Intervention Effectiveness (IE)

[Start Here](#)[One Population](#)[Two Populations, One Time Period](#)[Two Populations, Two Time Periods](#)

Assess Effectiveness of an Intervention by Comparing Two Populations within One Time Period

Use this tool to assess the impact of interventions on a student population (Population A) compared to a different population (Population B). Population B is a parallel population used for comparison.

Example 1: Compare the performance of freshmen in an appointment campaign (Population A) with all students in that campaign.

Example 2: Compare the performance Pre-Nursing students included in a campaign, compared to Pre-Nursing students who were not included in the



Population A:

Students w. Case Closed Outcome
'Contacted 3x no response'

Population B:

Students w. Case Closed Outcome
'Took Recommended action'

Time Period:

Spring 2021-Fall 2021

Set Up IE: Select Time Period and Populations

Time Period

ENROLLED IN START TERM: 2021 Spring

ENROLLED IN END TERM: 2021 Fall

Population A

Intervention Information

APPT. CAMPAIGN A: All

CAMPAIGN APPT. STATUS A: All

STUDENT LIST A: All

RQ, 21, Contacted 3x no response

Select all · Clear

☒ RQ, 21, Contacted 3x No response

Population B

Intervention Information

APPT. CAMPAIGN B: All

CAMPAIGN APPT. STATUS B: All

STUDENT LIST B: All

RQ, 21, Took Rec Action

Select all · Clear

☒ RQ, 21, Took Rec Action

Reviewing Outcomes in IE

Retention Rates, GPA Changes

Enrollment Summary	Start Term Spring 2019	End Term Fall 2019	Percent of the Start Term
A: Enrolled	884	741	83.8%
B: Enrolled	428	370	86.4%
A: Graduated	—	110	12.4%
B: Graduated	—	22	5.1%
A: Not Enrolled	—	33	3.7%
B: Not Enrolled	—	36	8.4%

Performance Summary	Start Term Spring 2019	End Term Fall 2019	Percent Change
A: Average Cumulative GPA	3.25	3.22	-0.9%
B: Average Cumulative GPA	3.00	3.04	+1.3%
A: Average Term GPA	3.23	3.22	-0.3%
B: Average Term GPA	2.98	3.00	+0.7%

Adjust process based on outcomes



Celebrate your wins

Use conclusions to adjust processes

Population A:

Student Contacted 3x, No response

- Retention to next term: 83.8%
- Ave Term GPA Change: -.3%

Population B:

Student took recommended action

- Retention to next term: 86.4%
- Ave Term GPA Change: +.7%

Quick Zoom Poll

Excel is a useful tool to use in conjunction with Reports...

How comfortable are you using Excel?

Quick Zoom Poll

Excel is a useful tool to use in conjunction with Reports...

How comfortable are you using Excel?



Ran two excel sessions this semester for faculty and staff

- Part 1: Beginner (60 minutes)
- Part II: Advanced (60 minutes)

Follow up to see how excel is being used

Dean of Student Success offered support after seeing success of program



Additional Resources



Find Additional Resources in Help Center



For more Reports
Overview & Basics



Reports Overview

[Click Here](#) to view the article

For more on pulling
success metrics in
Navigate



Tracking Intervention Impact

[Click Here](#) to view the article

For more on
evaluating Impact



Quantifying the Impact of Your Success Initiatives

[Click Here](#)

For more on using
the Intervention
Effectiveness Tool



Intervention Effectiveness Toolkit

[Click Here](#)

Thank you for joining!

Please share any feedback

We have shared a link to a short online evaluation in the **Chat** and we would appreciate if you could take 2-3 minutes to give us additional feedback on your experience today.



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