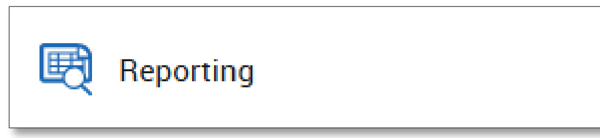
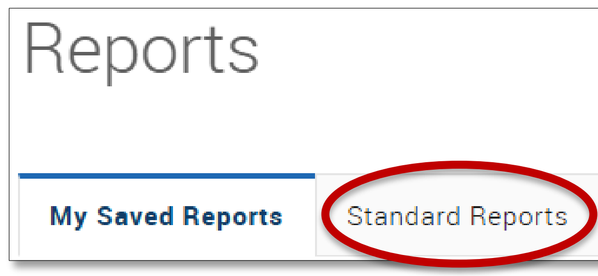
EAB NAVIGATE360: 3 WAYS TO USE V3 REPORT AUTOMATIONS

Automated actions allow staff users with the appropriate permissions to regularly view student data or take action on students matching criteria from a saved V3 Report. This extensive PDF Guide provides three ways to create an automation from V3 Reports: scheduling a V3 Report, adding a V3 Report Tile to the staff Dashboard, and adding students marked as No Show to an Appointment Campaign. Please [click here for the recorded Open Lab]() or reach out for more support.

SCHEDULE A V3 REPORT



This automation simply allows you to configure a recurring schedule to receive email notifications when a specific report is ready to run.

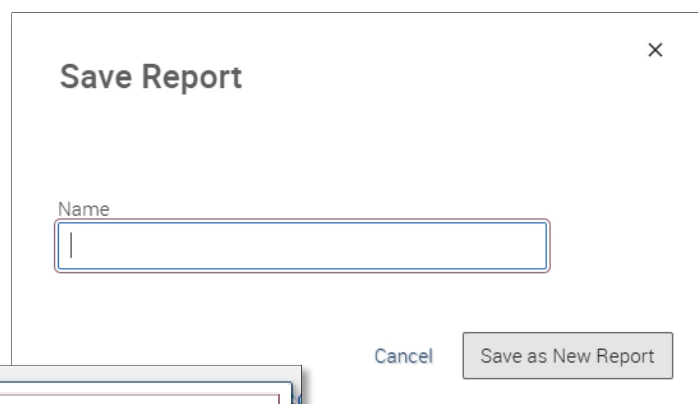


1. Start with the **Reporting** tool, then click the **Standard Reports** index tab to begin setting up a report that you'd like to configure a schedule for.

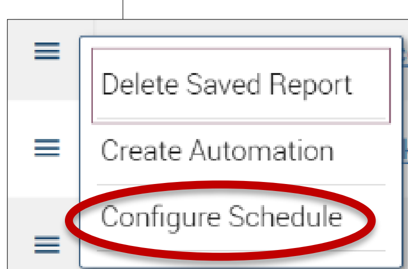
   In this example, we will pull an Appointments Report to be notified of the number of appointments a Location has scheduled for the upcoming calendar week.

2. Select **Appointments Report** or [click here for the report filters](). Adjust the Location, check the box for My Students Only, then click **Run Report**.

3. Next, click **Save As** and create a report name that is easy to recall.



4. Go back to the Reporting tool. Under **My Saved Report**, click on the three stacked lines next to the report you just created and select **Configure Schedule**.



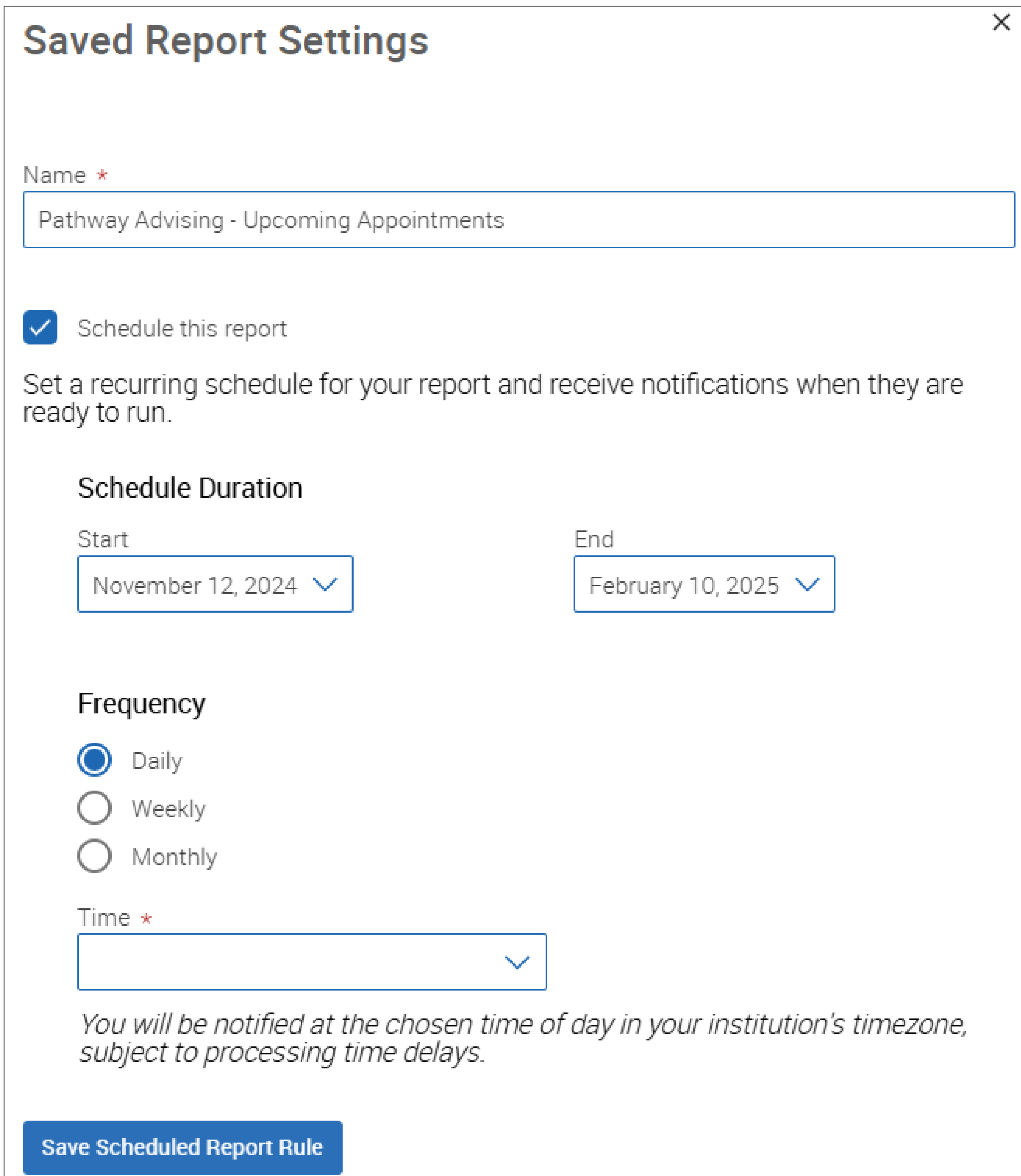
5. The **Saved Report Settings** page will appear on the right-hand side of the screen.

   Create a name for your scheduled report.

   Check the box for **Schedule this report** then indicate the start and end dates, frequency, and time you'd like to be notified about this V3 report.

   Then click **Saved Scheduled Report Rule**.

Once your configuration has been scheduled, you will receive an automated email notification that your report is ready to run. Click on that link to be directed to Navigate360 reports.



ADD A V3 REPORT TILE TO YOUR DASHBOARD

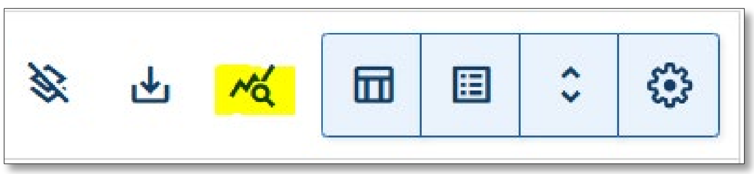
This automation allows you to view custom V3 Report Tiles on the staff Dashboard tool. The staff Dashboard is a feature designed to give staff users an at-a-glance overview of ongoing or recent activity. Users can create custom Tiles from V3 Reports to be more productive and strategic when managing a unique/specific caseload.

1. Start with the **Reporting** tool, then click the **Standard Reports** index tab to begin setting up a report you'd like to frequently receive updates on and view on your staff Dashboard.

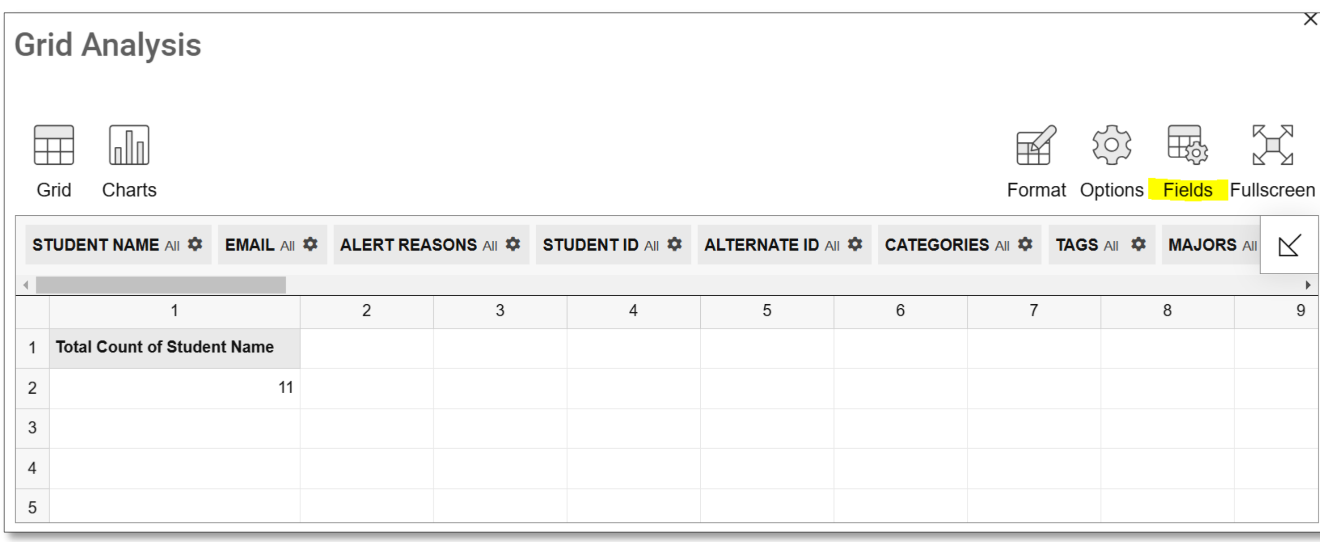
   In this example, we will pull a **Progress Reports Report** to view the different types of negative progress reports that our assigned caseload has received since the start of the semester.

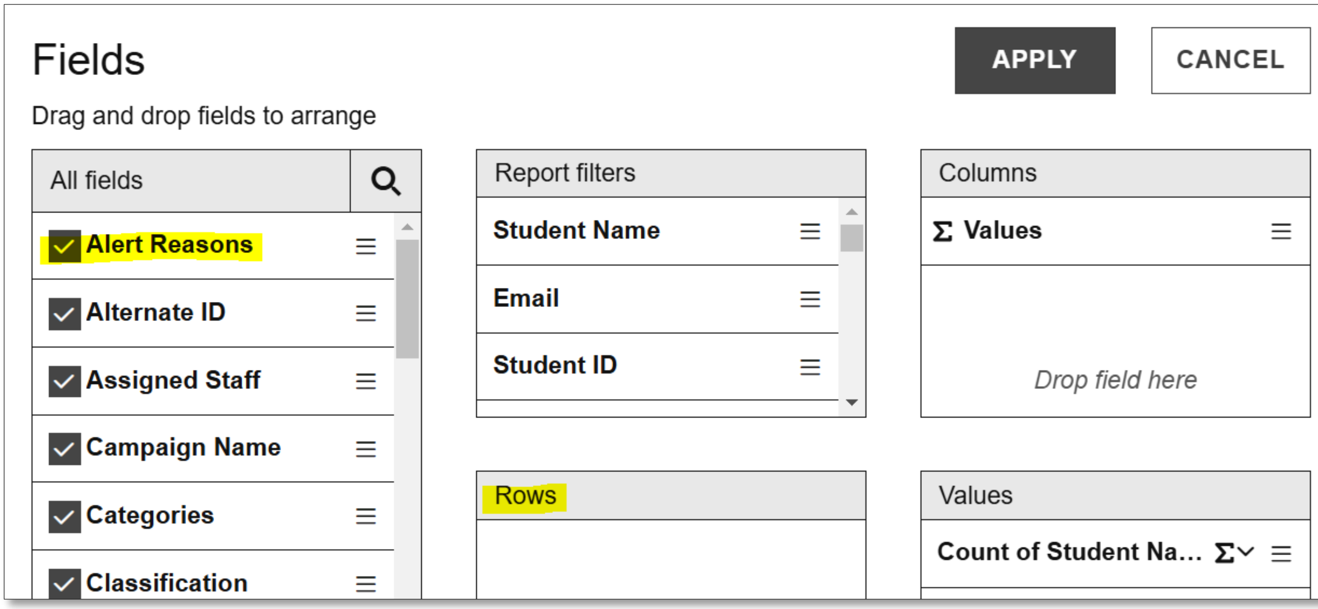
2. Select **Progress Reports Report** or click here for the report filters. Check the box for My Students Only OR add a filter to only run the report for a specific Student List, then click Run Report.

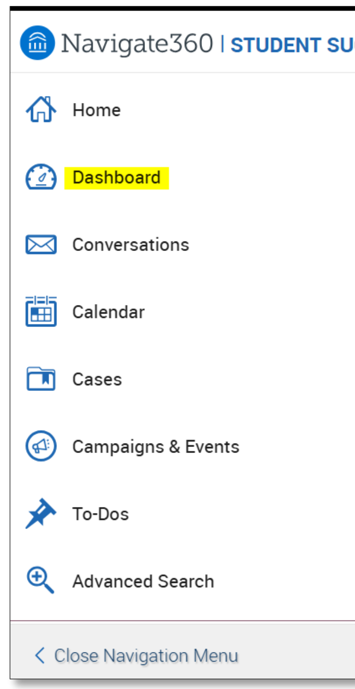
3. Once your results have loaded, select the icon in the top right corner for **Load grid into a pivot table**.



4. Select **Fields**. Under the **All fields** list, search for **Alert Reasons** and drag this field into **Rows** then click **Apply**.





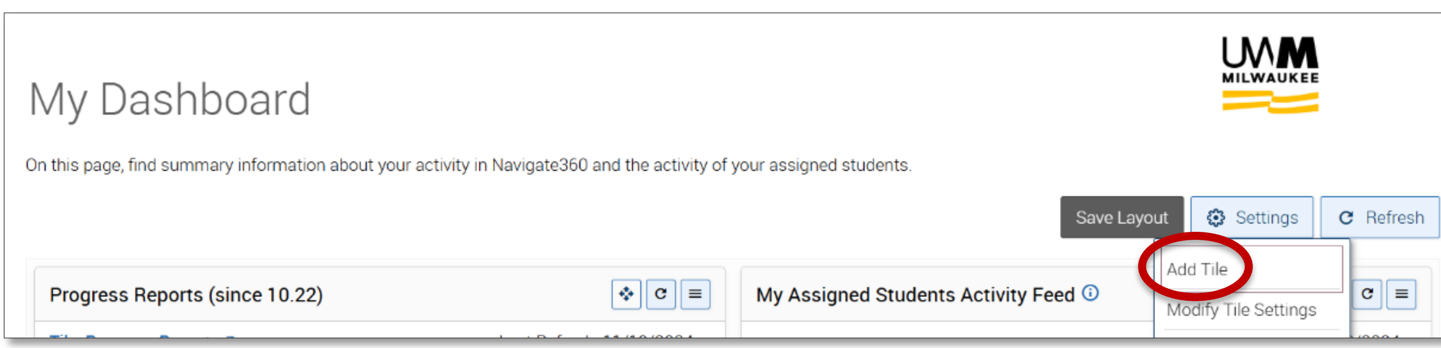


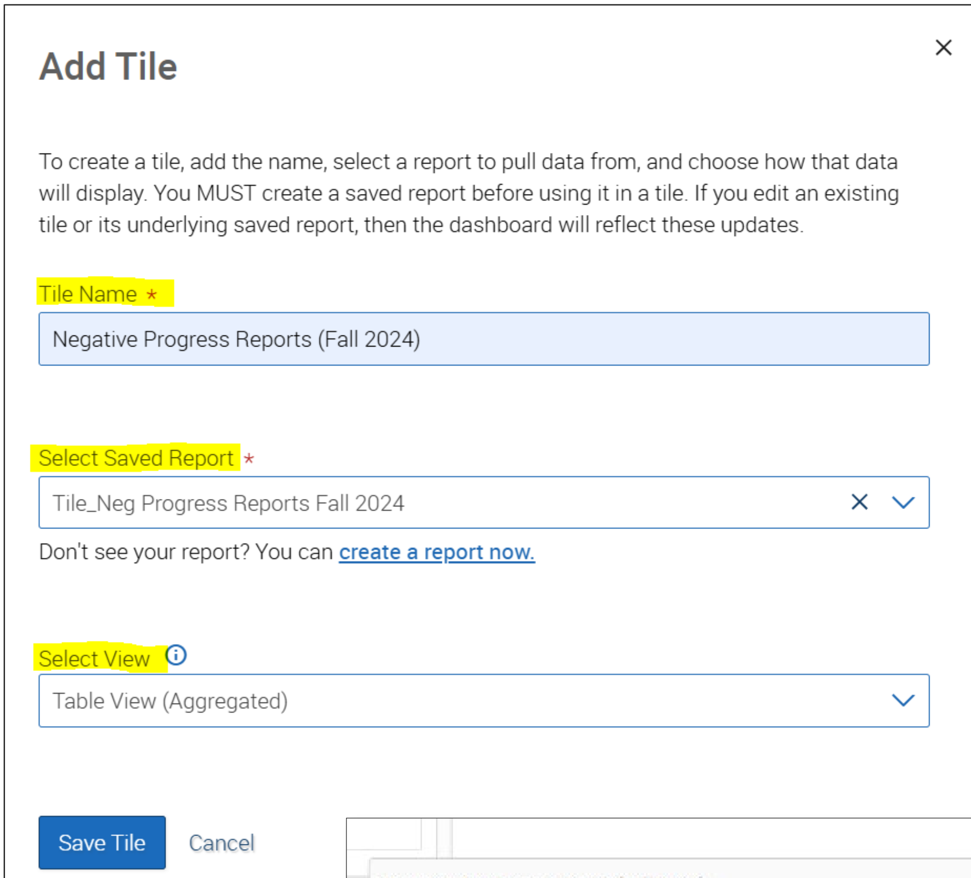
5. Close out of the **Grid Analysis** Box, returning to the Data Filters page.

   IMPORTANT: scroll up and click **Save As** to save this V3 report. We recommend including the word "tile" somewhere in the report name such as: "Tile - Negative Progress Reports Fall 2024"

6. Now that your report and pivot settings have been saved, click on the **Dashboard** tool.

7. Click on **Settings** then **Add Tile**.





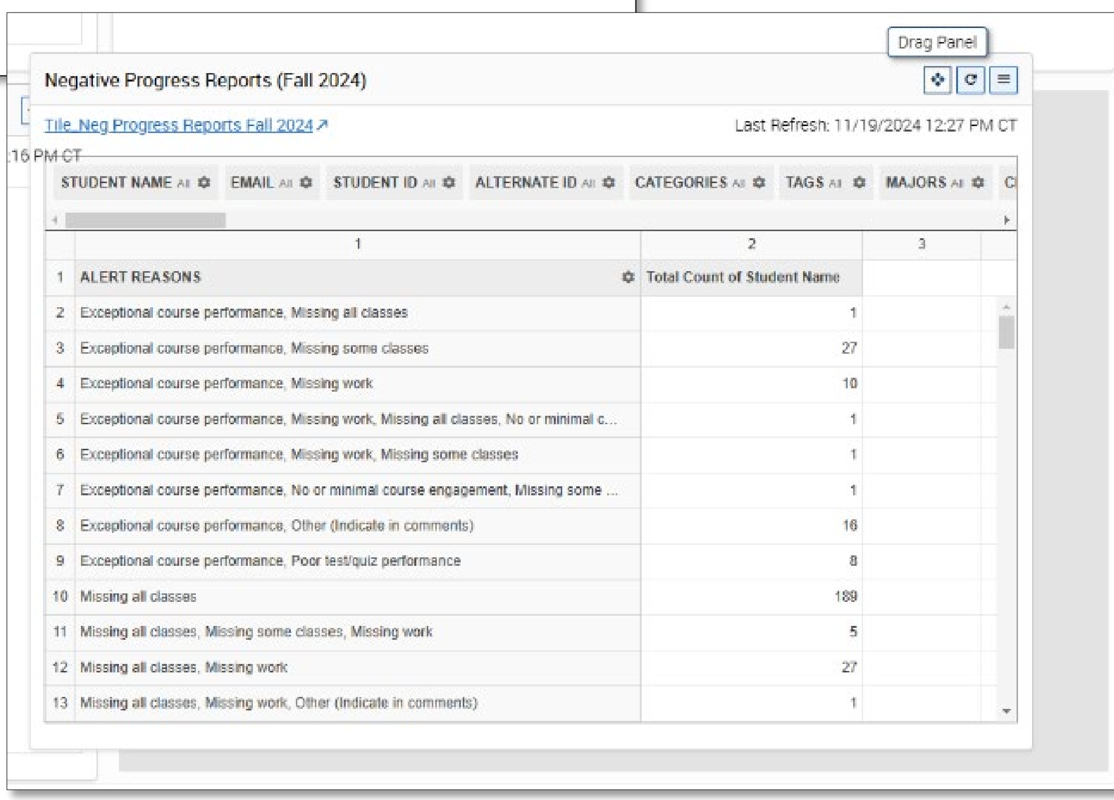
8. The **Add Tile** page will appear on the right-hand side of the screen. Enter a Tile Name then select the report that you just saved.

Under **Select View**, select **Table View (Aggregated)**.

You'll get a confirmation message that the widget was successfully created.

Scroll down to view your new Tile (it might take a minute for the data to fully load).

Drag and reorganize your Tiles as desired.



	1	2	3
1	ALERT REASONS	Total Count of Student Name	
2	Exceptional course performance, Missing all classes	1	
3	Exceptional course performance, Missing some classes	27	
4	Exceptional course performance, Missing work	10	
5	Exceptional course performance, Missing work, Missing all classes, No or minimal c...	1	
6	Exceptional course performance, Missing work, Missing some classes	1	
7	Exceptional course performance, No or minimal course engagement, Missing some ...	1	
8	Exceptional course performance, Other (Indicate in comments)	16	
9	Exceptional course performance, Poor test/quiz performance	8	
10	Missing all classes	189	
11	Missing all classes, Missing some classes, Missing work	5	
12	Missing all classes, Missing work	27	
13	Missing all classes, Missing work, Other (Indicate in comments)	1	

AUTO-ADD STUDENTS MARKED AS ‘NO SHOW’ TO AN APPOINTMENT CAMPAIGN

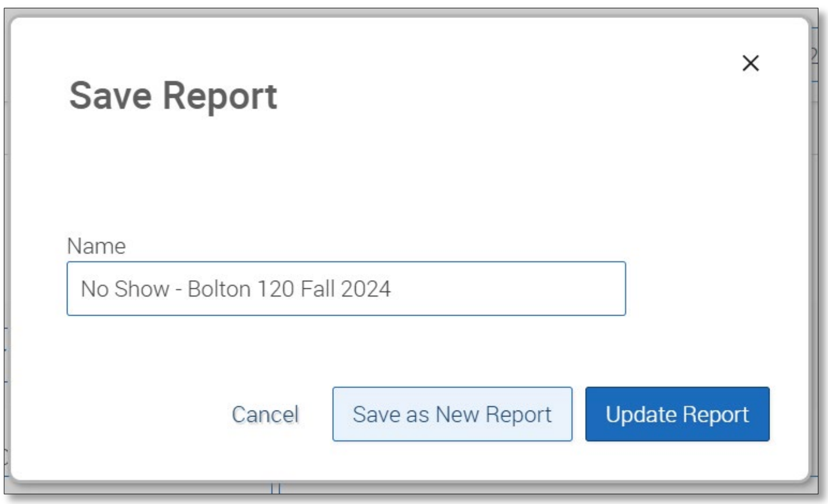
First, email navigate-support@uwm.edu to add this permission to your staff account. This report will automatically add a student who has been marked as No Show to an ongoing Appointment Campaign that will provide a timely and customized outreach message. Automating no show students to a campaign will address their absence and provide an opportunity to reschedule.

1. This advanced automation will require multiple steps between the Reporting and Appointment Campaign tools.

   Start with the **Reporting** tool, then click the **Standard Reports** index tab to begin setting up an **Appointment Summaries Report** or click here for the report filters.

   Check the box for My Students Only. Adjust the Location and Care Unit, then click Run Report.

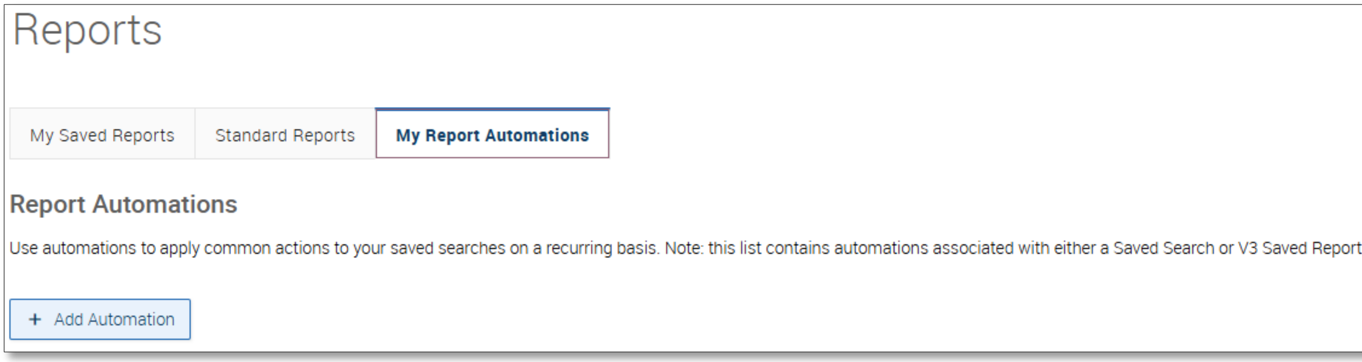
   IMPORTANT: Save this report. We recommend including the words “no show” somewhere in the report name such as: “No Show – SSC Bolton 120 Fall 2024”.



2. Next, go to **Campaigns & Events** to set up a new **Appointment Campaign**. Skip the part where you add recipients to the campaign.

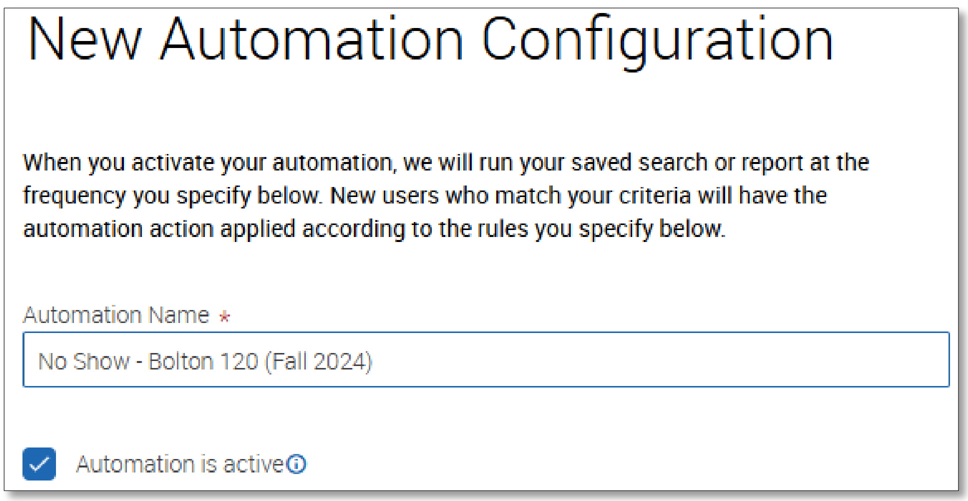
   IMPORTANT: Compose a customized welcome message and any scheduled nudges to specifically address that the student is being contacted because they did not appear for a scheduled appointment. Click Verify & Start.

   OPTIONAL: Use Content Templates to create a template for future no show appointment campaign automations.



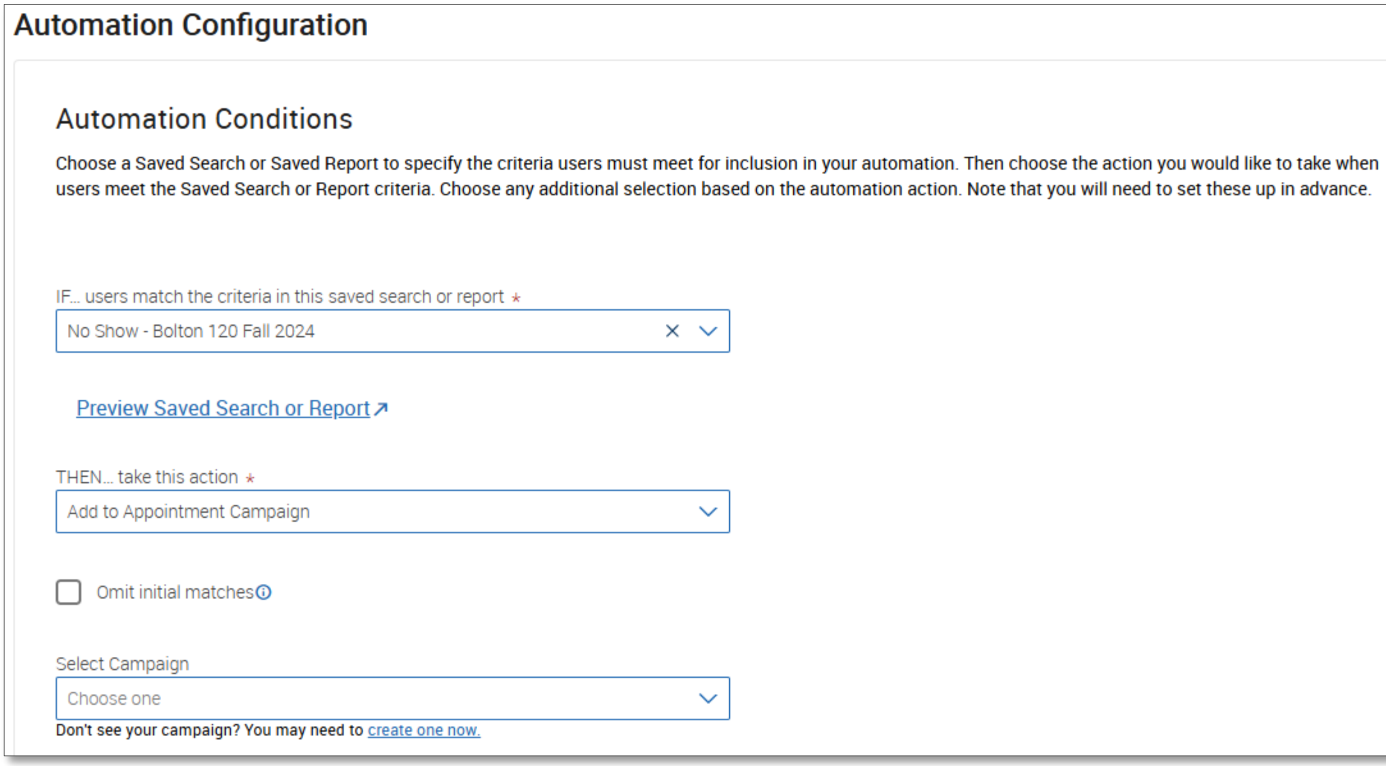
3. Once the Appointment Campaign has been set-up, go back to **Reporting**. Under the **My Report Automations** index tab, click **Add Automation**.

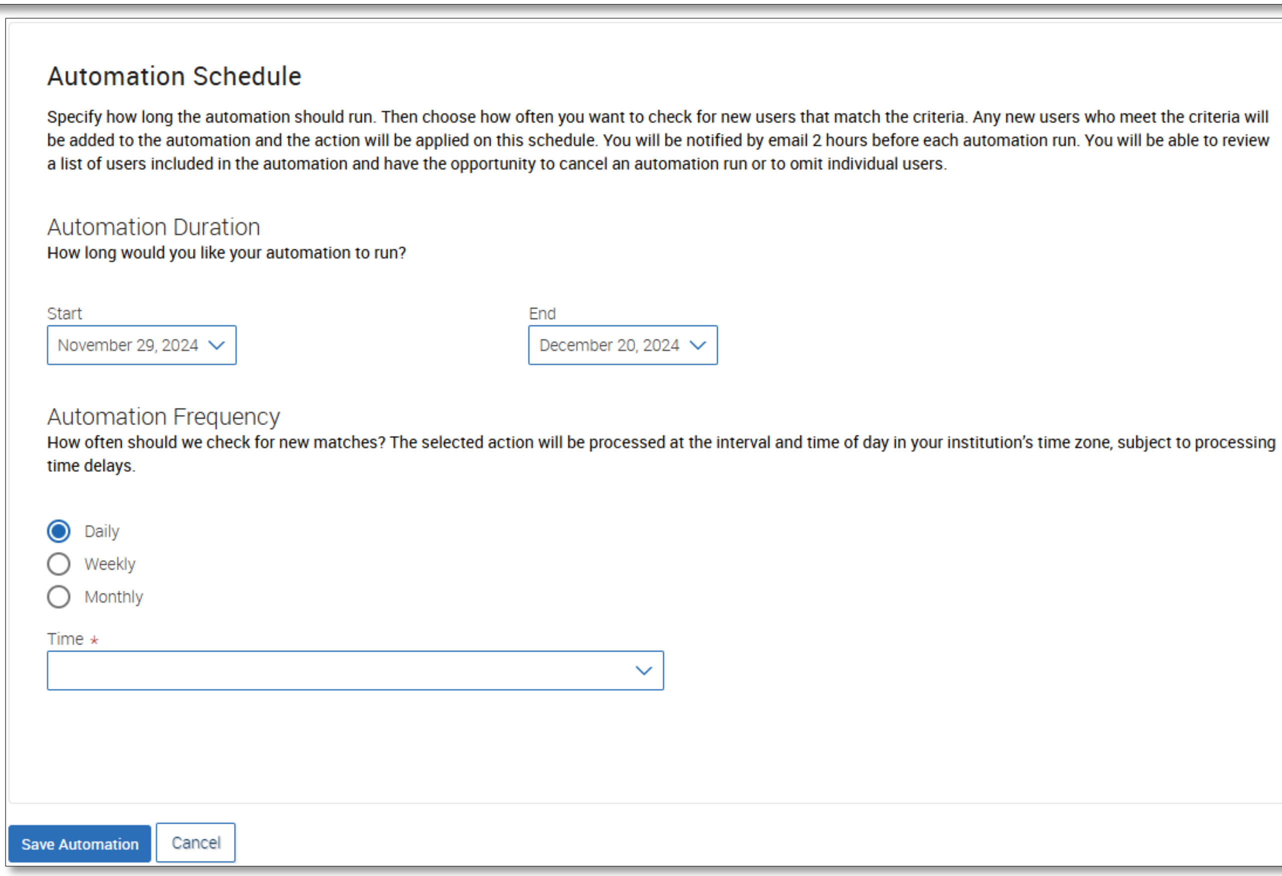
4. On the **New Automation Configuration** page, create an Automation Name and check the box next to Automation is Active.



5. Next, set up the Automation Conditions as follows:

    a. Add your Saved Report from Step 1 under **IF users match the criteria in this saved search or report**
    b. Under **THEN take this action**, select Add to Appointment Campaign
    c. Leave the box for **Omit initial matches** unchecked
    d. Add your Appointment Campaign from Step 2 under **Select Campaign**





6. Finally, set up your preferred **Automation Schedule** by determining the duration you'd like to add students marked as No Show to the Appointment Campaign and the frequency you'd like to check for new matches. Click **Save Automation** and your automation is ready to go!

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