

Accessing Standard Reports



What: V3 Reports contain data and analytic insights related to student success programs. The V3 reports will produce the same results as our legacy Reports, which are still available. The legacy Reports will be sunset at a later date.

Where: Access the Reports landing page by selecting the **Reports icon** on the left sidebar.

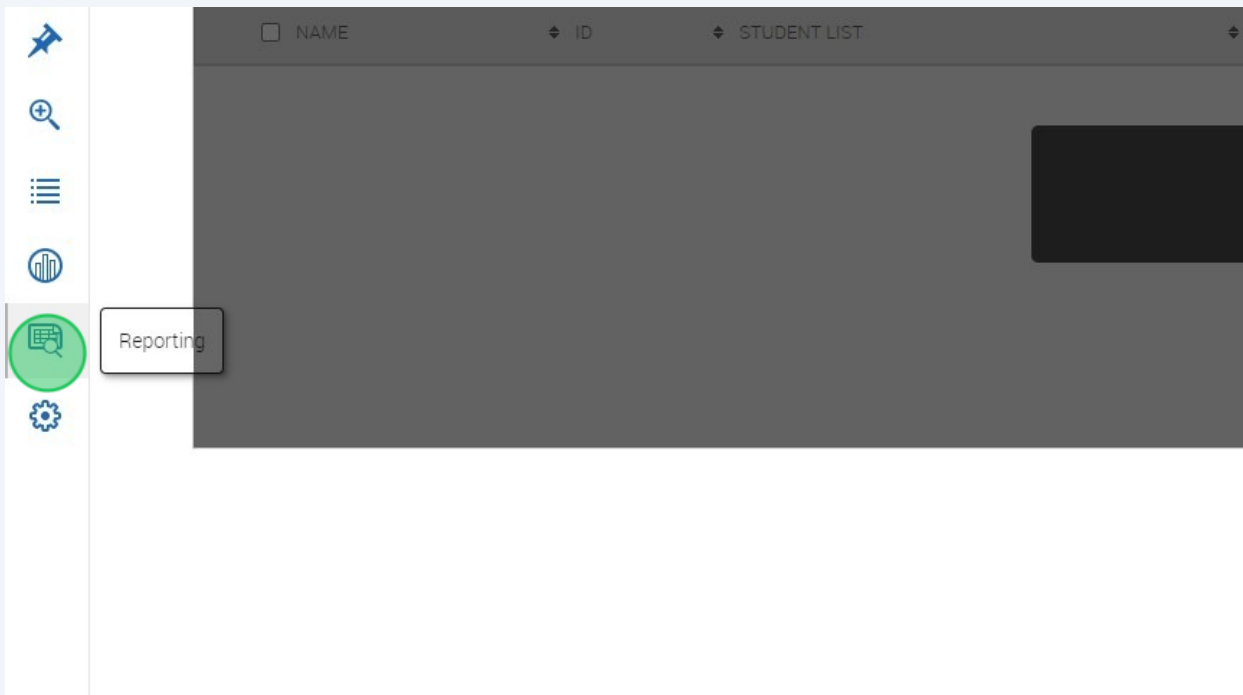
Who: Reporting is a helpful tool for **staff** tasked with pulling reports and analytics related to student success programs. This may be the institutional administrator, someone from the provost's office, IR, or another specialized staff member. That said, other staff may also have access to these reports depending on your institution's policies.

Conditions: Your institution must have access to reports tied to Strategic Care. Your role must be given access to the reports. Each report has an individual permission for access.

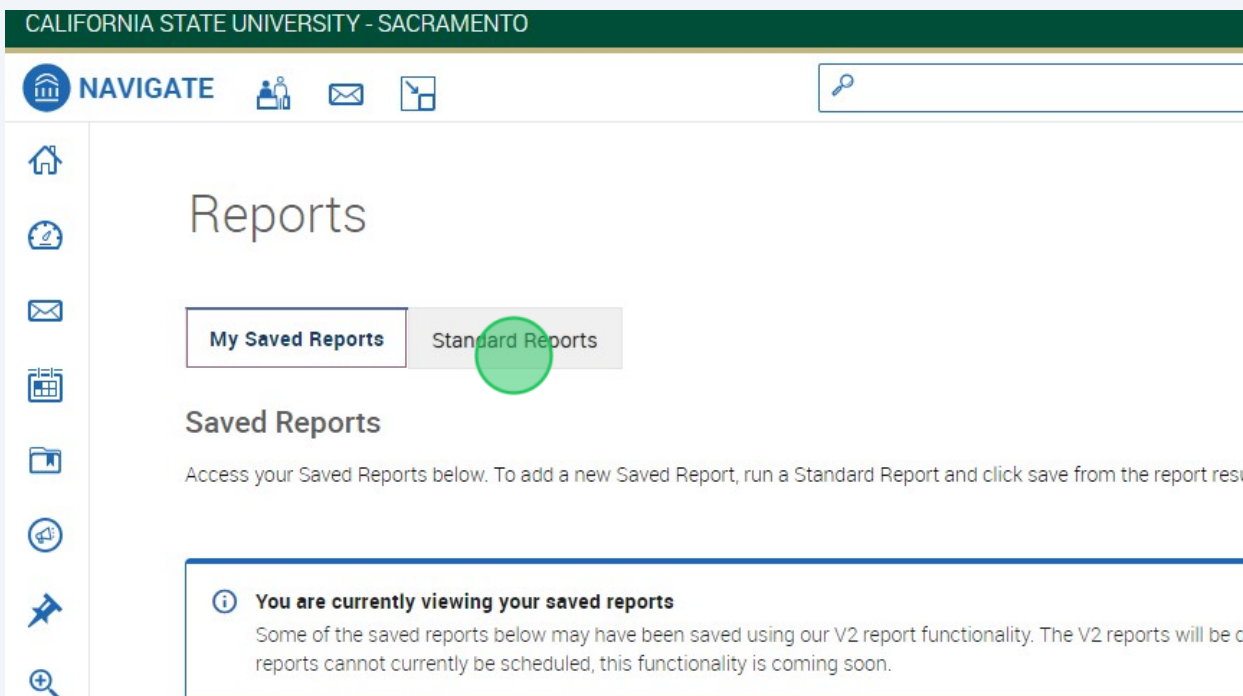
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Navigate to <https://csus.campus.eab.com/home>

2 Click here.



3 Click "Standard Reports"



4 Select a Report - Example: Check-Ins Report

The screenshot shows the 'Reports' section of the Sacramento State system. At the top, there is a navigation bar with 'STATE UNIVERSITY - SACRAMENTO' and a search bar. Below this, the 'Reports' title is displayed, along with the Sacramento State logo and tagline 'Redefine the Possible'. There are two tabs: 'My Saved Reports' and 'Standard Reports', with 'Standard Reports' being the active tab. A sub-header 'Standard Reports' is followed by a brief instruction: 'Select a report type below to customize and run a new report. To save a report for future use, click save from the report results.' A notification box states: 'You are currently viewing the V3 reports. The reports below have improved infrastructure, advanced filtering options, and new grid styling and functionality. These reports will produce the same results as our V2 reports. Should you need to access the V2 reports for any reason, click here. The V2 reports will be sunset on a later date, to be announced.' Below the notification is a table with a search bar and a 'Cutaway' column. The table lists several report types, with 'Check-ins Report' highlighted. At the bottom of the page, there is a footer with 'EAB' logo, privacy policy links, and a refresh timestamp: 'Page last refreshed at 3:10pm. All times listed are in Pacific Time (US & Canada)'. A blue circular icon with a question mark is located in the bottom right corner of the page.

STATE UNIVERSITY - SACRAMENTO

Reports

My Saved Reports Standard Reports

Standard Reports

Select a report type below to customize and run a new report. To save a report for future use, click save from the report results.

You are currently viewing the V3 reports
The reports below have improved infrastructure, advanced filtering options, and new grid styling and functionality. These reports will produce the same results as our V2 reports. Should you need to access the V2 reports for any reason, click [here](#). The V2 reports will be sunset on a later date, to be announced.

Report Type	Cutaway
Appointment Cancellation Report	Appointment/Visits Reports
Appointment Requests Report	Appointment/Visits Reports
Appointment Summaries Report	Appointment/Visits Reports
Appointments Report	Appointment/Visits Reports
Check-ins Report	Appointment/Visits Reports
Alerts Report	Intervention Reports

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Page last refreshed at 3:10pm
All times listed are in Pacific Time (US & Canada) [Additional](#)

5 Build Your Report

Example:

Field #1 : Select "Care Unit" > Condition: Contains Any > Value: Select "Advising"

Field #2: Select "Location" > Condition: Contains Any > Value: "Career Center"

Additional Options Below: Include Inactive Users, Include My Students Only, At-Risk Students Only

The screenshot displays the 'Check-Ins Report' configuration interface. At the top, there is a 'Report Information' section and an 'Unsaved Report' indicator. The 'Data Filters' section is active, showing a filter logic of 'Match all Filters (AND)' and 'Results must match ALL filters: 1'. A single filter is applied: 'Field #1' with a value of 'Care Unit' and a condition of 'Contains Any'. Below the filter, there are three checkboxes: 'Include Inactive Users', 'Include My Students Only', and 'At-Risk Students Only'. The 'Report Results' section at the bottom shows 'No Results' and a search bar for results.

6 Building a Report

Add a Data Filter

To generate a report, begin with creating your search parameters. Use Data Filters to define report-specific behavior or objects. Select a field, condition, and value for each row. Filters can be mixed and matched for more precision in your report.

Tips and tricks:

- Fields are specific to your report type.
- Conditions vary by data type. For example, if a field contains dates, you can filter by a date range.
- Values are specific to each field.
- Want all available data? Filter by a required field and select the "is not empty" condition.

Add Additional Search Criteria

You can add multiple filters to a report. Click **+Add Filter** to add another filter to the report.

Additional Checkboxes

Many of the reports include extra checkboxes and most will include the checkboxes *Include Inactive Users* and *Include My Students Only* (both unchecked) by default. These help further narrow your report results. An example of the filter checkboxes available in the Appointments Report is displayed below.

Run Report

Once your search criteria are set, click **Run Report** to run the report. Note that any reports with more than 20,000 rows will not display results; instead, you will have to download a CSV of the results.

The screenshot displays the 'Check-Ins Report' interface. At the top, it shows 'ALIFORNIA STATE UNIVERSITY - SACRAMENTO' and 'NAVIGATE'. The report title 'Check-Ins Report' is on the left, and the Sacramento State logo is on the right. Below the title, there's a 'Report Information' section, an 'Unsaved Report' indicator, and a 'Load Saved Report' button. The 'Data Filters' section is prominent, showing 'Filters Logic: Match all Filters (AND)' and 'Results must match ALL filters: 1'. A filter is applied: 'Field: Care Unit', 'Condition: contains any', and 'Value:'. Below this, there are three checkboxes: 'Include Inactive Users', 'Include My Students Only', and 'At-Risk Students Only', all of which are unchecked. A '+ Add Filter' button is located below the filter row. At the bottom of the filter section is a blue 'Run Report' button. Below that is the 'Report Results' section, which includes a search bar labeled 'Search in Results' and some navigation icons.



Saving a Report

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. Downloaded Reports will continue to be available in the Download Center for 7 days.

To save a report, run your report as usual and then click the **Save As...** button on the results page.

After creating a saved report, the report will appear on the **Saved Reports** tab.