HELLO!

The webinar will begin at 4:05pm
Feature Spotlights

Spring 2024

- January – Setting and Maintaining Availability
- February – Alerts and Cases (referral system)
- April – V3 Reports
- May – Advanced Searches
Today

V3 Reporting

- What, Why, & How
- V2 vs V3
- V3 Examples
What: V3 Reports contain data and analytic insights related to student success programs.

Why: Reports will help you gather the data and information you need with simple filters.

How: Reports icon on the left sidebar
V2 Reporting

Still accessible but will be sunset in the future. Therefore, please start using V3 Reporting.

<table>
<thead>
<tr>
<th>Student Information</th>
<th>First Name, Last Name, Student ID, Category, Tag, Gender, Race or Ethnicity, Student List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment History</td>
<td>Enrollment Terms</td>
</tr>
<tr>
<td>Area of Study</td>
<td>College/School, Degree, Concentration, Major</td>
</tr>
<tr>
<td>Term Data</td>
<td>Classification, Term GPA</td>
</tr>
<tr>
<td>Performance Data</td>
<td>GPA, Hours, Credits</td>
</tr>
</tbody>
</table>
Start in the **Standard Reports** tab to see an overview of the types of Reports you can pull. From there, start building your custom Reports using the data filters.
## V3 Reporting

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Summaries Report</td>
<td>Appointment/Visits Reports</td>
</tr>
<tr>
<td>Appointments Report</td>
<td>Appointment/Visits Reports</td>
</tr>
<tr>
<td>Check-Ins Report</td>
<td>Appointment/Visits Reports</td>
</tr>
<tr>
<td>Alerts Report</td>
<td>Intervention Reports</td>
</tr>
<tr>
<td>Cases Report</td>
<td>Intervention Reports</td>
</tr>
<tr>
<td>Progress Reports Report</td>
<td>Intervention Reports</td>
</tr>
</tbody>
</table>
Here are some reports you may use:

- **Appointment Reports** - shows any appointment created by a user
- **Student Reports** - shows general information for students
- **Alerts Reports**
- **Cases Reports**
Let’s practice together!

- I want to find all the meetings from the last month that are missing summary reports.

- I want to find all students in (major) with a 3.0 GPA or higher.
Tips for getting started:

- Start in your V2 Saved Reports and re-build and save those Reports using V3 Reports.

- Don’t forget- Users can share the filters they select for a report by choosing the Share These Filters button.

- Column Manager is where you can edit the columns you see for your results.
THANK YOU

Join us May 2nd – Advanced Searches for our next feature spotlight!