



# Product Release: Introducing Navigate's Improved Standard Reports

Impacts and Rollout

Student Success Collaborative

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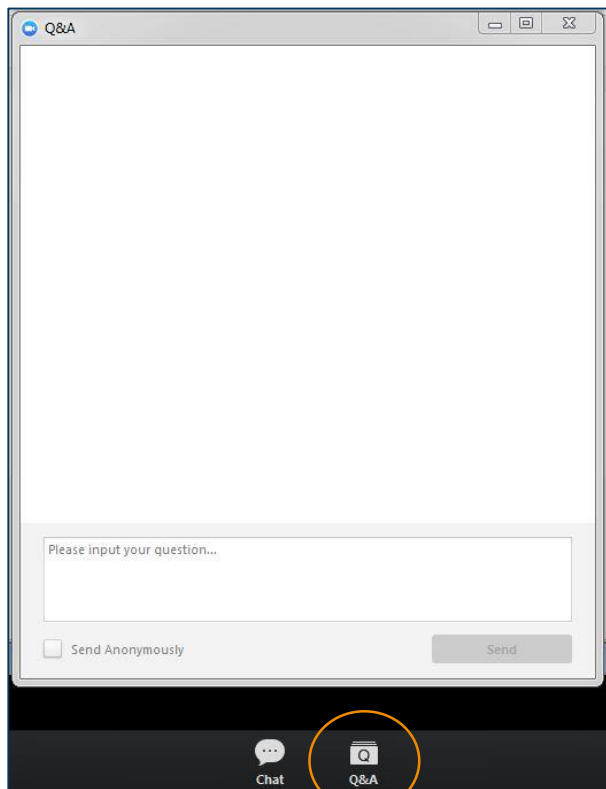


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After the webinar, a member of our team will be in touch to follow-up on your questions individually.

*Type your question here*



# Today's Presenters



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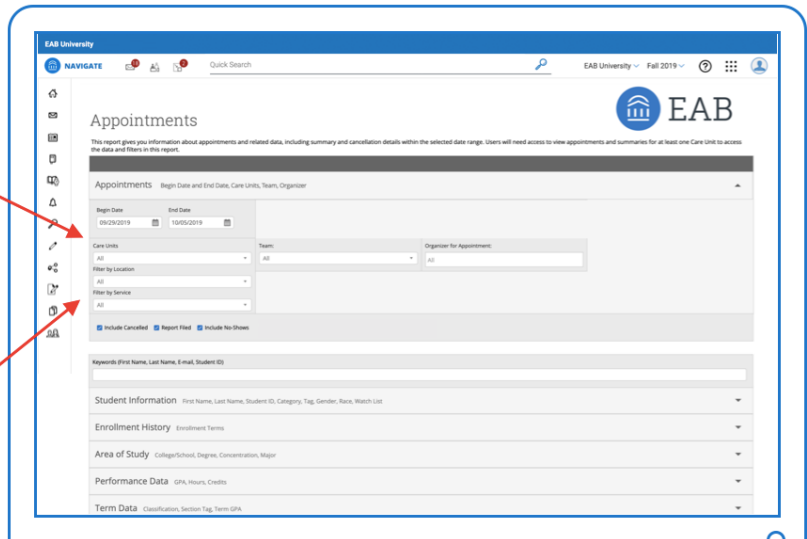
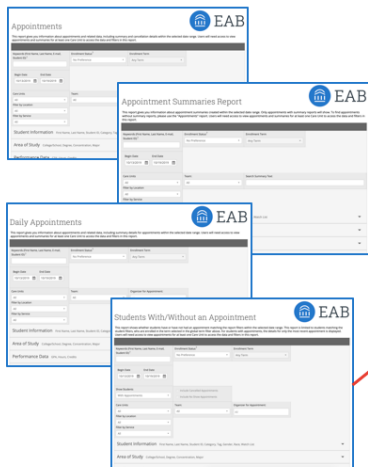
Rquillard@eab.com

- 1 Our Goals for the Project
- 2 Key Benefits
- 3 Live Demonstration
- 4 Rollout Recommendations and Next Steps
- 5 Q&A

# From Our Product Roadmap

## Streamline Reporting

You can **Simplify Your Workflow** and **Increase Data Confidence**



Visible on **Staff Reports Page**

Status **In Development Now**

# 49 Legacy Reports Down to 16 New Reports

Improved, Consolidated, and Deprecated

Legacy Reports (Removed Summer 2020)	New Standard Reports
Appointment Summaries	Appointment Summaries
Appointments	Appointments
Daily Appointments	
Students with/without appointment	
Cancellation Summaries	
Student Services	
No-Shows	
Availabilities	Availabilities
Availabilities by Course	
Appointment Requests by Course	Appointment Requests Report
Appointment Requests	
Check-Ins	Check-Ins
Alerts	Alerts
Cases	Cases
Students Active for Term	Students Active for Term
Notes	Notes
Student Assignments	Assignment Report
Student Assignments Past Due	
Absences	Attendance Report
Absence Details	
All Recorded Attendances	
Sections with/without Attendance	
Students with Courses	Students with Courses
Dropped Classes	
Non-campaign Enrollment Census	Enrollment Census Report
Student Progress Reports	Progress Reports
Progress Report Requests	
Students Flagged At-Risk	
Detailed Students Flagged At-Risk	
Detailed Student Progress Reports	

Charity Time	Study Hall Report
Completed Required Study Hall Hours	
Did Not Complete Required Study Hall Hours	
Weekly, Monthly, Term Time	
History Log	
Calendar Stats	Calendar Stats
Appointment Stats	Report Has Been Phased Out
Appointment Activity	
Cancellation Summary Stats	
Service Totals	
At-Risk Progress Reports and Appointments	
Students with/without Advisors	
Students by Category and Course	
Users Who Have Logged In	
Users Who Have Not Logged In	
Professors Active for Term	
Students Currently Checked In	
Students Recently Checked Out	
Total Legacy Reports: 49	Total New Reports: 16

# Factors Impacting Our Decisions

## Our Goals for Consolidated and Removed Reports



### **Which Reports to Consolidate?**

- Common use cases
- Common data points
- Duplicative data
- Discrepant data



### **Which Reports to Remove?**

- Low utilization
- Low data confidence
- Duplicative data
- Alternative (or more appropriate) data available



# Legacy Standard Reports



## Reports

### Appointments

#### Appointments

#### Appointment Summaries

#### Daily Appointments

#### Students with/without an Appointment

Cancellation Summaries

Appointment Stats

No-Shows

Availabilities

Appointment Activity

Cancellation Summary Stats

Service Totals

Availabilities by Course

Appointment Requests by Course

Appointment Requests

Check-ins

At-Risk Progress Reports And Appointments

### Alerts & Cases

Alerts

Cases

### Student Information

Students Active for Term

Students with/without Advisors

Students with Courses

Students By Category and Course

Student Assignments

Student Assignments Past Due Report

Notes

### Enrollments & Attendance

Absences

Absence Details

All Recorded Attendances

Sections with/without Attendance

Dropped Classes

Non-Campaign Enrollment Census Report

### Progress Reports

#### Student Progress Reports

#### Progress Report Requests

Students Flagged At-Risk

Detailed Students Flagged At-Risk

Detailed Student Progress Reports

### Users

Users Who Have Logged In

Users Who Have Not Logged In

Professors Active for Term

### Study Hall

Students Currently Checked In

Students Recently Checked Out

Charity Time

Completed Required Study Hours

Did Not Complete Required Study Hours

Weekly, Monthly, Term Time

History Log

### Additional Reports

Student Services

Conversation Stats

# New Standard Reports



## Reports

### Appointment/Visit Reports

[Appointments](#)

[Appointment Summaries](#)

[Appointment Requests](#)

[Check-Ins](#)

### Intervention Reports

[Alerts](#)

[Cases](#)

[Progress Reports](#)

[Enrollment Census](#)

### Student Data Reports

[Notes](#)

[Assignments](#)

[Attendance](#)

[Study Hall](#)

[Student Enrollments](#)

[Student Info \(Students Active for Term\)](#)

### Staff Reports

[Availabilities](#)

 You are viewing **V2 Reports**. [View Legacy Reports](#)

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Our Goals for the Project

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**Key Benefits**

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Live Demonstration

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Q&A

# Simplifying Your Workflow

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## Now .CSV Export Rather Than .XLS

Before

Woodley - EAB Use					
Appointment Summaries Report					
01/12/2020 to 01/18/2020					
Date/Time: 01/17/2020 04:43 PM					
Printed By: Support 17					
Student ID	Alternate	Student email	Care Unit	Staff name	Student name
620135	620135	johnd@woodley.edu	Tutoring	Carla, Larue	Carla, Larue
620138	620138	jay@woodley.edu	Tutoring	Melissa, Anne	Melissa, Anne
620267	620267	julian@woodley.edu	Advising	Cyrene, Marla	Julian, Elizabeth

After

Whitehurst	Appointment	11/01/2019	1/16/20 11:00	Support 435		
Student Name	Student E-mail	Student ID	Student Alternate ID	Categories	Tags	Classification
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
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Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N
Johnson, Dav	nnfio1@ziq	63397350		Swimming,V	Attended Kic	Prospective (N

## Removed Keyword Search

Student Information
First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

First Name<sup>?</sup>
Last Name<sup>?</sup>

From Last Name<sup>?</sup>
To Last Name<sup>?</sup>
Student ID<sup>?</sup>

Gender
Race
Watch List (in Any of These)
Transfer Student

All
All
All
Any

E-mail(s)

## Addition of Term Enrollment Filters and Removal of Global Term Filter Dependency

**Student Filters**

**Student Information** First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

**Enrollment History** Enrollment Terms

Enrollment Terms (In Any of these)?  
All

Enrollment Terms (In All of these)?  
All

Enrollment Terms (In None of these)?  
All

**Area of Study** College/School, Degree, Concentration, Major

**Term Data** Classification, Section Tag, Term GPA

**Performance Data** GPA, Hours, Credits

**Course Data** Course, Section, Status

**Assigned To**

**Success Indicators** Success Markers

# Increasing Usability

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## Standard Actions

**Actions ▲**

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

## New Filter User Interface

**Activity Filters**

Begin Date  
09/03/2019

End Date  
09/19/2019

Care Units  
All

Team:  
All

Organizer for Appointment:  
All

Appointment Campaign:  
All

Filter by Location  
All

Filter by Service  
All

☒ Include Cancelled Appointments ☒ Include No Shows ☐ Report Filled Only ☐ Campaign Appointments Only

**Student Filters**

Student Information

First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

Enrollment History

Enrollment Terms

Area of Study

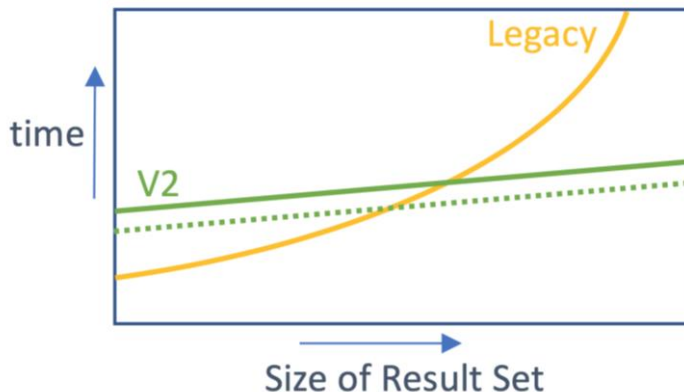
College/School, Degree, Concentration, Major

Term Data

Classification, Section Tag, Term GPA

## Changes to Performance

### Reports Performance Characteristics



- The optimization that we introduced allows all reports, regardless of date range, to run in the same amount of time across the board.
- Reports with larger data sets will see drastic improvements in run time, but the impact on smaller data sets may be that they run slower than legacy reports.

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Our Goals for the Project

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Key Benefits

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Live Demonstration

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Rollout Recommendations and Next Steps

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Q&A



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# Turn On New Reports, and Off Legacy Reports

## Next Steps

### Turn On New Reports

### Turn Off Legacy Reports

1. Email Partner Support Team when you are ready to turn on the new reports, after the 19.2.3 release.
2. Set permissions on each role.


Standard Reports (Legacy)

Standard Reports (New and Improved)

These settings control which reports users are permitted to see. Data related to Care Units is controlled via Care Unit Permissions and Data Access.

- ☐ View Alerts Report
- ☐ View Appointments Report
- ☐ View Appointment Requests Report
- ☐ View Appointment Summaries Report
- ☐ View Attendances Report
- ☐ View Availabilities Report
- ☐ View Calendar Stats Report
- ☐ View Cases Report
- ☐ View Check-Ins Report
- ☐ View Enrollments Report
- ☐ View Enrollment Census Report
- ☐ View Notes Report
- ☐ View Progress Reports Report
- ☐ View Assignments Report
- ☐ View Study Hall Report
- ☐ View Student Info Report

1. Email Partner Support Team when you are ready to turn off the legacy reports.
2. **If no action is taken to turn off Legacy Reports, those reports will automatically be turned off when Legacy Reports are sunset in Summer 2020.** More information to come on the specific date we will sunset Legacy Reports.



Issues found in Legacy Reports will be deferred and will not be fixed. If the same issue occurs in New Reports, we will fix the issue only in those new reports.

# Rollout Recommendations

## Consider the Following



### **Do Not Roll Out New Reports Until...**

- Updating your training documentation
- Communicating the changes to staff, especially those who may have created templates or specific workflows based on legacy report structure



### **When Rolling Out, Consider the Audience for the Data...**

- Care Unit-specific data within a standard report is determined by the "View Permissions" permission in User Role & Configurations
- There are no column-specific permissions
- Student Info is the only report housing demographic information (e.g., gender, race/ethnicity, addresses, phone numbers)



### **And Finally...**

- Roll out the reports sooner rather than later so you can take advantage of the benefits. You can provide a period of transition, if needed, by allowing access to both New and Legacy Reports for a short time period.

# Standard Reports & Analytics

Leverage Insights from Different Levels, Where Appropriate

**Standard Reports & Analytics both tell what occurred in student academic performance, progress, and service support. Their representation of this data spans multiple insight levels:**

Insight Level	Reporting Component	Ex. Service Support	Ex. Academic Performance, Progress
Low-level detail	Standard Reports	Appointments, Appointment Summaries	Course-specific: Students Enrollments Semester-specific: Student Info
Mid-level trending	Analytics	Activity Reports	Population Health Dashboards
High-level overview	Analytics	Activity Dashboard	Intervention Effectiveness

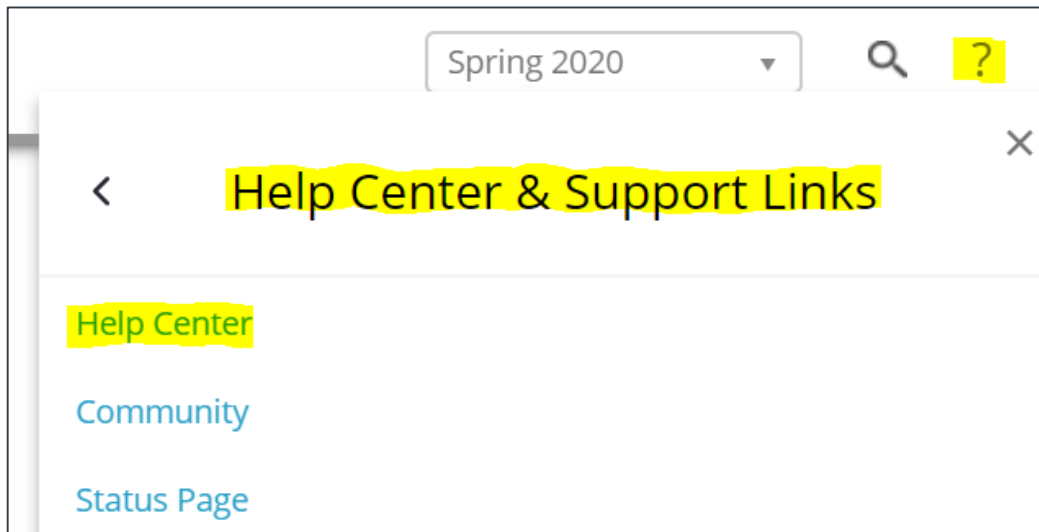
# Training Resources

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Visit the Help Center!

**1) Product Updates → Strategic Care Release Notes → Strategic Care 19.2.2 Release Notes**

**2) Platform Information → Feature Index → Strategic Care – Reports**



# Continuing The Conversation

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Join us for future webinars, regional summits, and user interviews

## Community

We will have a new topic on the Community to discuss the rollout and release of new functionality, to share what's working with each other, and what you like, or don't like, about the release.

**New Community Topic for Recent Releases!**

## Regional Summits

Across the year, EAB will help facilitate numerous Regional Summits across the Collaborative. During some of those meetings, we will give you more opportunities for interaction and feedback on product discussions.

## UX & SL

At various times, you may hear directly from one of us, or our UX team, for specific feature feedback. We also encourage you to talk to your Strategic Leader about how we can improve features!

**Watch for In-App Feedback Opportunities**

Ask EABert!



**Thank you for everything that you all do!**

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