Updated: 11/13/2025

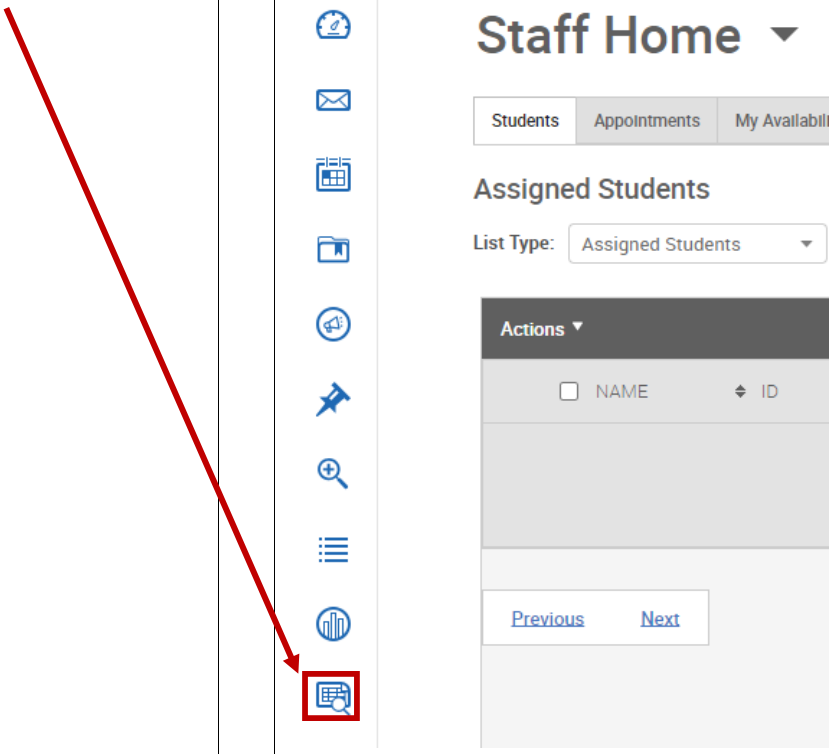
Navigate LA V3 Reports introduce a new **query builder interface**, replacing the Boolean drawer used in V2. This updated design gives users more flexibility and control when defining report criteria.

Accessing the Reports

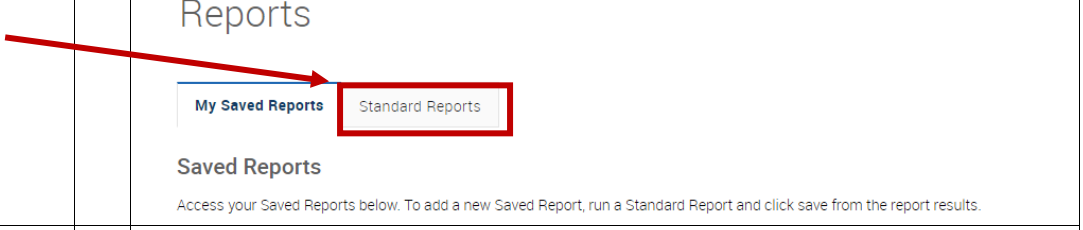
Step 1: Log-in to Navigate LA



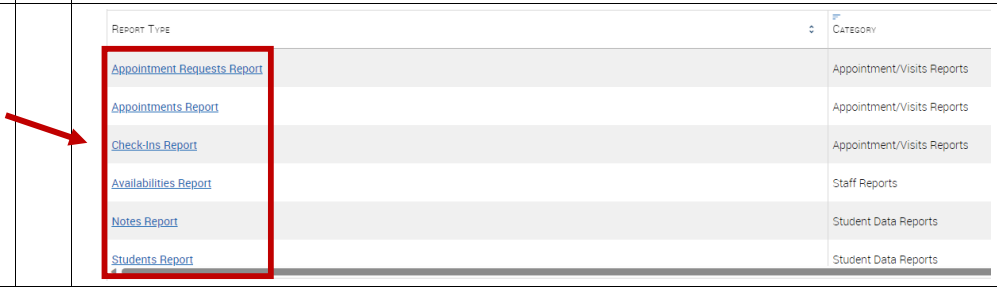
Step 2: On the Staff Home Page Click the Reports Option from the left list of Icons



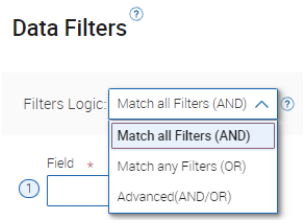
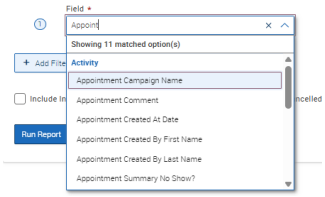
Step 3: Select the "Standard Reports" tab.



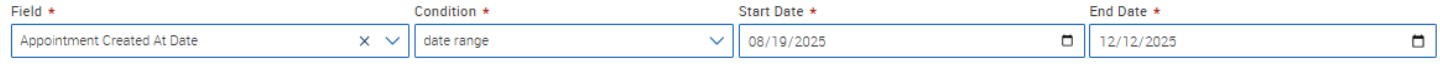
Step 4: Select the "Standard Report" needed. Proceed to the next section on how to use the Filter Logic blocks



Data Filters

Filters Logic: Determine whether you want the values to be returned based on Any, All, or a combination of the criteria entered.	Determines how multiple filters interact with each other. Users can choose from three modes: • **Match All Filters** – records must satisfy every filter. • **Match Any Filter** – records must satisfy at least one filter. • **Advanced** – users define custom logic using filter row numbers (e.g., 1 AND ((2 AND 3) OR (4 AND 5))).	
Filter: Filters have 2 or more components. You can use multiple variations of the same filter within the same report to create a very refined list of results.	Each report starts with one default filter visible. Users can add additional filters as needed. Filters are organized into logical groups (for example, the **Appointment Type** filter is found under the **Activity** group). **1. Searchable Filter List** • Users can type part of a filter name, and the drop-down list will dynamically narrow to show only matching filters. • Example: typing *"Appoint"* will display only filters containing that text. **2. Filter Condition Types** Depending on the selected filter, the available condition types follow common patterns: • **Date** – filter using dates or date ranges. • **List (*Simple*)** – filter by selecting one or more existing options from a list. • **List (*Enhanced*)** – filter by selecting one option from an existing list that is contextually based on the original selection. Sub-filters may then be applied, allowing the user to choose one or more additional values to further refine the filter. • **Logical** – filter using boolean values (True/False). • **Numeric** – filter using numbers (e.g., greater than, less than, equal to). • **Term (*Course*)** – filter using Academic Terms to find course information, with optional sub-filters for course characteristics. • **Term (*List*)** – filter by first selecting an Academic Term, then choosing one or more options from a list to complete the filter operation. • **Term (*Numeric*)** – filter using Academic Terms to find results that include numeric values (e.g., credits taken). • **Text**– filter using text entered by the user.	**Example** 
Include/Exclude:	A set of checkboxes that lets users exclude or include certain information from results, depending on the selected option. E.g. by default, entries for students that are no longer active in Navigate LA are not included on reports. Turn on "Include Inactive Users" to include these entries.	**Example** 

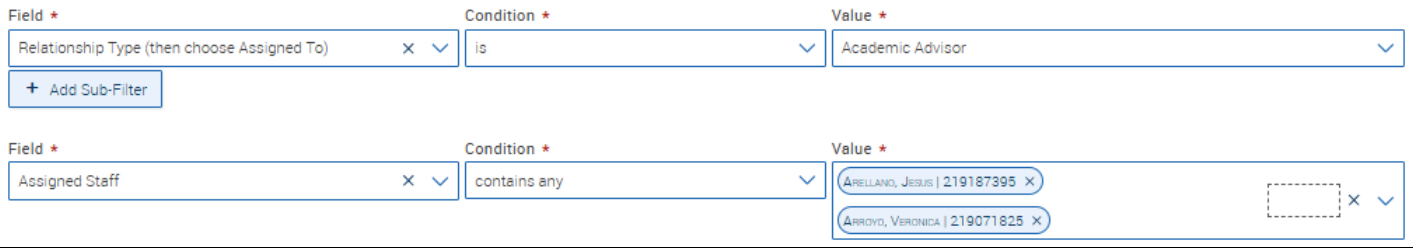
Filter Conditions Type		
Type	**Conditions**	**Value**
Date Users select/enter one or more **[Date]** entries. Use Date picker or manual entry. Format: **MM/DD/YYYY**	Date Range	Show records with dates on or between both Start **[Date]** & End **[Date]**
	Last	Show records with dates **(**1 Day, 2 Days… 1 Year) before today
	Next	Show records with dates (1 Day, 2 Days… 1 Year) after today
	Current	Show records with dates based on current (Day, Week, Month, Year)
	Since	Show records with dates **[Date]** to the time the report is run
	Before	Show records with dates from before **[Date]**
	After	Show records with dates after **[Date]**
	Is empty	Show records with dates that **do not have** data
	Is not empty	Show records with dates that **has** data



List (*Simple*) Users select one or more Pre-existing **[Item]**. Uses a dropdown list.	Contains any	Show records that match at least 1 **[Item]** listed
	Does not contain any	Show records that do not match any **[Item]** listed
	Contains all	Show records that match all **[Item]** listed
	Does not contain all	Show records that do not match all **[Item]** listed
	Is empty	Show records that do not have data
	Is not empty	Show records that has data



List (*Enhanced*) Users select only one **[Item]** from a list in the Main filter. Optional sub-filter uses one or more **[Item]** from a list based off of Main Filter	**Main Filter**	
	Is	Shows records that match the **[Item]** Selected
	Is not	Shows records that does not match the **[Item]** Selected
	Is empty	Show records that do not have data
	Is not empty	Show records that has data
	Sub Filter	
	Contains any	Show records that match at least 1 **[Item]** listed
	Does not contain any	Show records that do not match any **[Item]** listed
	Contains all	Show records that match all **[Item]** listed
	Does not contain all	Show records that do not match all **[Item]** listed
	Is empty	Show records that do not have data
	Is not empty	Show records that has data

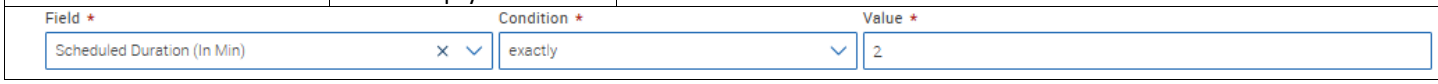


Logical Checks if **[Option]** exists or does not exist.	Contains	Show records if **[Option]** <u>partially</u> matches on the results
	Is	True or False
	Is not	True or False
	Is empty	Show records that do not have data
	Is not empty	Show records that has data



Filter Conditions Type (continued)

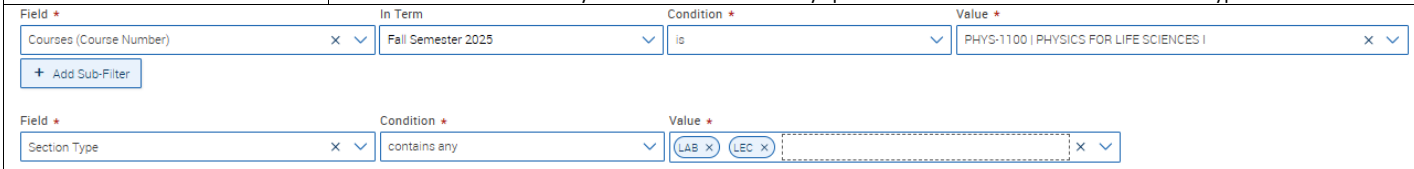
Type	Conditions	Value
Numeric Users enter a **[Number]** to use as the filter criteria free form numeric box with up and down arrows (+1|-1)	Exactly	Show records that match **[Number]**
	Is not	Show records that do not match **[Number]**
	Less than	Show records that are **less than [Number]**
	Less than or equal to	Show records that are **less than or equal to [Number]**
	Greater than	Show records that are **greater than [Number]**
	Greater than or equal to	Show records that are **greater than or equal to [Number]**
	between	Show records that are **between [Number 1]** and **[Number 2]**
	Is Empty	Show records that do not have data
	Is not Empty	Show records that does have data



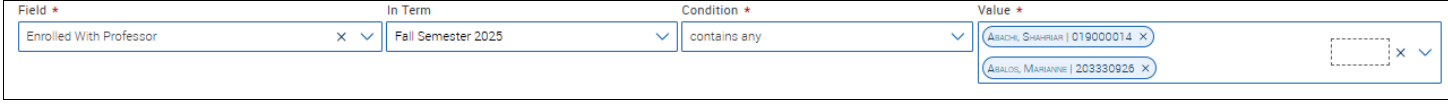
Term (*Course*)	Main Filter	
Users select a **[Term]** and a **[Course]** to filter for. Optional sub-filter to include Section Name and/or Type or Grade received. Sub-filters use "List" conditions	Is	Show records where the selected **[Course]** was taken during the **[Term]**
	Is not	Show records where the selected **[Course]**was taken during the **[Term]**
	Is Empty	Show records where no courses were taken during the [**Term]**
	Is not Empty	Show records where any course was taken during the [**Term]**
	*Contains Any	Shows records where courses taken during **[Term]** contains the typed Info
	*Does not contain any	Shows records where courses taken during **[Term]** does not contain the typed Info
	****Sub Filter**	
	Contains any	Show records that match at least 1 **[Item]** listed
	Does not contain any	Show records that do not match any **[Item]** listed
	Contains all	Show records that match all **[Item]** listed
	Does not contain all	Show records that do not match all **[Item]** listed
	Is empty	Show records that do not have data
	Is not empty	Show records that has data

* Term based filter for "**Contains any**" and "**Does not contain any**" allow for multiple entries using space separations.
E.g. Use "**Anthr Mat**" when selecting the "Contains Any" condition to return records where "**Anthr**opology and **Mat**h" courses were taken

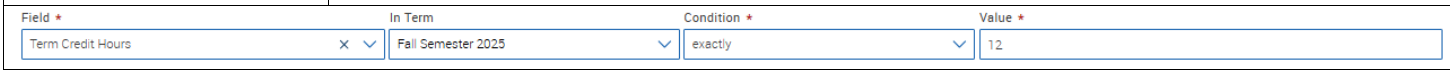
** Main Filter "Contains any" or "Does not contain any" prevents the use of sub-filters for "Section Type" and "Section Name"



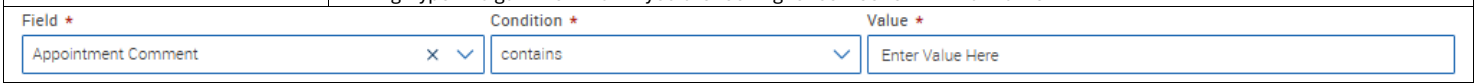
Term (*List*)		
Users select a **[Term]** and a **[Item]** to filter for.	Contains any	Show records that match at least 1 **[Item]** listed during the **[Term]**
	Does not contain any	Show records that do not match any **[Item]** listed during the **[Term]**
	Contains all	Show records that match all **[Item]** listed during the **[Term]**
	Does not contain all	Show records that do not match all **[Value]** listed during the **[Term]**
	Is empty	Show records where **[Item]** does not have data during the **[Term]**
	Is not empty	Show records where **[Item]** has data during the **[Term]**



Filter Conditions Type (continued)		
Type	**Conditions**	**Value**
Term (*Numeric*) Users select a **[Term]** and a **[Number]** to filter for.	**Main Filter**	
	Is	Show records where the selected course was taken during the **[Term]**
	Is not	Show records where the selected course was taken during the **[Term]**
	Is Empty	Show records where no courses were taken during the [**Term]**
	Is not Empty	Show records where any course was taken during the [**Term]**
	***Contains Any	Shows records where courses taken during **[Term]** contains the typed Info
	***Does not contain any	Shows records where courses taken during **[Term]** does not contain the typed Info
	*** Term based filter for "**Contains any**" and "**Does not contain any**" allow for multiple entries using space separations. E.g. Use "**Anthr Mat**" when selecting the "Contains Any" condition to return records where "**Anthr**opology and **Mat**h" courses were taken	



Text Users manually enter an alphanumeric **[Text]** to filter with	Contains	Show records where **[Text]** partially matches the record
	Is	Show records where **[Text]** completely matches the record
	Is not	Show records where the record does not match **[Text]**
	Is empty	Show records where the record is blank
	Is not empty	Show records where the record is not blank
	Start with	Show records where the record begins with **[Text]**
	Ends with	Show records where the record ends with **[Text]**
	from	Show records where record is greater than **[Text]**
	To	Show records where the record is less than **[Text]**
	Between	Show records where the record is greater **[Text1]** and Less **[Text2]**
	****Any	Show records where the record completely matches any one of **[Text]**
	****None	Show records where the record does not completely matches any **[Text]**
	****Option for "Any" and "None" allow for multiple entries using space separations **** Any and none look use whole word matching not partial matching. Type the whole word to not part of it to work. E.g. type "Abigail" not "Abi" if you are looking for someone with that name.	



Appointments Report

Include / Exclude Options

Setting	Effect
Include Inactive Users	Values returned will **include** users with profiles that were deactivated (Graduate/Disqualified)
Include My Students Only	Values returned will be **limited to** only students that are assigned to the report author
Include Cancelled Appointments	Values returned will **include** instances where appointments were canceled
Report Filed Only	Values returned will be **limited to** instances where an appointment summary report was filed
Campaign Appointments Only	Values returned will be **limited to** instances that were part of a appointment campaign

Filter List

Option	Filter Condition Set	Option	Filter Condition Set
Activity		**Student Area of Study**	
Appointment Campaign Name	List (*Simple*)	College	List (*Simple*)
Appointment Comment	Text	Concentration	List (*Simple*)
Appointment Created At Date	Date	Degree	List (*Simple*)
Appointment Created By First Name	Text	Major	List (*Simple*)
Appointment Created By Last Name	Text	**Student Information**	
Appointment Summary No Show?	Logical	Alternate ID	Text
Appointment type	List (*Simple*)	Categories	List (*Simple*)
Associated With Campaign	Logical	Courses (Course Number)	Term (*Course*)
Attendance Created at Date	Date	Email	Text
Attendance Created By First Name	Text	First name	Text
Attendance Created By Last Name	Text	Gender	List (*Simple*)
Cancellation Comment	Logical	Last Name	Text
Cancellation Reason	Logical	Race or Ethnicity	Text
Cancelled By	Logical	Student ID	Text
Cancelled?	Logical	Student List	List (*Simple*)
Care Unit	List	Tags	List (*Simple*)
Check In Date	Date	Transfer Student	Logical
Check out Date	Date	**Student Performance Data**	
Date Summary Report Submitted Date	Date	Credit Comp%	Numeric
Group Appointment?	Logical	Credits Earned	Numeric
Late Cancel No Show?	Logical	Cumulative GPA	Numeric
Location	List (*Simple*)	Hours Attempted	Numeric
Scheduled Course	List (*Simple*)	Institution GPA	Numeric
Scheduled Duration (In Min)	Numeric	Major GPA	Numeric
Scheduled End Date	Date	Overall GPA	Numeric
Scheduled Meeting Type	List (*Simple*)	Term Credit Hours	Term (*Numeric*)
Scheduled Service	List (*Simple*)	Transfer GPA	Numeric
Scheduled Start Date	Date	**Student Staff Assignments**	
Staff Organizer E-Mail	Text	Relationship Type (then choose assigned to)	List (*Enhanced*)
Staff Organizer First Name	Text		
Staff Organizer ID	Text	**Student Success Indicators**	
Staff Organizer Last Name	Text	Missed Success Markers	Numeric
Summary Report Filed?	Logical	Predicted Support Level	List (*Simple*)
Time Slots in Appointment	Numeric	**Student Term Data**	
Time Slots Remaining in Appointment	Numeric	Classification	Term (*List*)
Number Of:		Enrolled With Professor	Term (*List*)
Appointments	Numeric	Term GPA	Term (*List*)

Appointments Report Sample Report

#1: Appointments made at Arts and Letter Advising for general advising or graduation application. Time frame April 8 through April 20 2025. Include inactive students. Do not include cancellations or no-shows. Do not limit to appointments that had reports filed or limit to campaign appointments only.

Setup for the report:

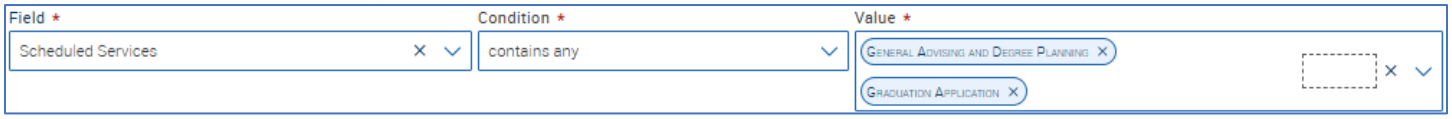
1. Care Unit: Undergrad Advising
   a. **Field:** Activity > Care Unit
   b. **Condition:** Contains All
   c. **Value:** Undergraduate Advising



2. Location: College of Arts & Letters Advising Center
   a. **Field:** Activity > Location
   b. **Condition:** Contains All
   c. **Value:** College of Arts and Letters Advising Center



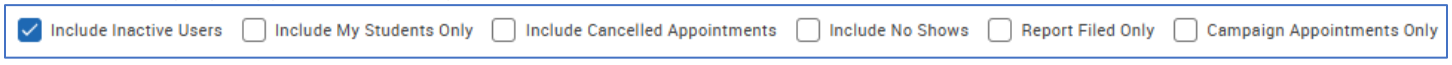
3. Services used: (General Advising and Degree Planning) **or** (Graduation Application
   a. **Field:** Activity > Scheduled Service
   b. **Condition:** Contains Any
   c. **Value 1:** General Advising and Degree Planning
   d. **Value 2:** Graduation Application



4. Schedule Start Date: 4/8/2025 to 4/30/205
   a. **Field:** Activity > Scheduled Start Date
   b. **Condition:** Date Range
   c. **Start Date:** 4/8/2025
   d. **End Date:** 4/30/2025



5. Includes/exclude
   a. **Include Inactive Users:** Yes
   b. **Include My Students only:** No
   c. **Include Cancelled Appointments:** No
   d. **Include No Shows:** No
   e. **Reports Filed Only:** No
   f. **Campaign Appointments Only:** No



6. Run the Report

