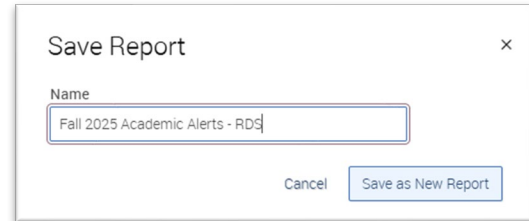


Navigate360: Saving & Scheduling Reports in V3 Reporting


Searches from reports can be saved and automatically re-run without re-entering Fields. After saving a report, users can configure a schedule for the report to run automatically and send updates to their Outlook.

1. Save your Report

- Once results have been generated, click *Save As* in the *Unsaved Report* box at the top of the page
- A *Save Report* dialogue box will appear. Under *Name* type a specific name for the report.
 - NOTE:** If this report is associated with a specific campaign, consider naming the report to match the campaign including user initials
Example: *Fall 2025 Academic Alerts - RDS*
- Click *Save as New Report*



2. Configure a Schedule

- To *Configure a Schedule* for a Saved Report, click the hamburger menu  beside the title of the saved report
- Click *Configure Schedule*
- A *Saved Report Settings* box will appear. Set a recurring schedule by selecting a *Start Date* and *End Date* under *Schedule Duration*
- Select a *Frequency* to receive the report: *Daily*, *Weekly*, or *Monthly*
 - NOTE:** If selecting *Weekly*, select the *Day* of the week to receive the report
 - NOTE:** If selecting *Monthly*, select the *Type* (Specific Day, First, Second, Third, Fourth) and *Day* (First, Last, 2, etc.) of the month
- Select the *Time* to receive the report to your Outlook
- Click *Saved Scheduled Report Rule*

