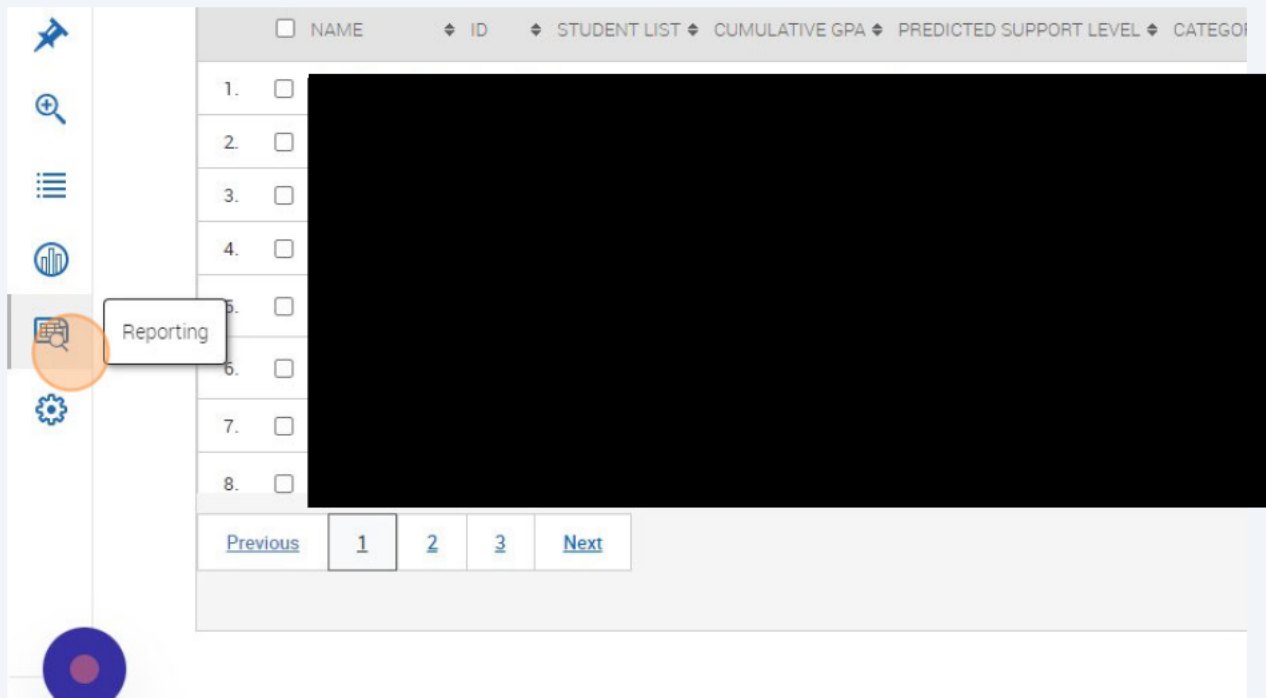


Generating Appointment Reports in V2 Reports

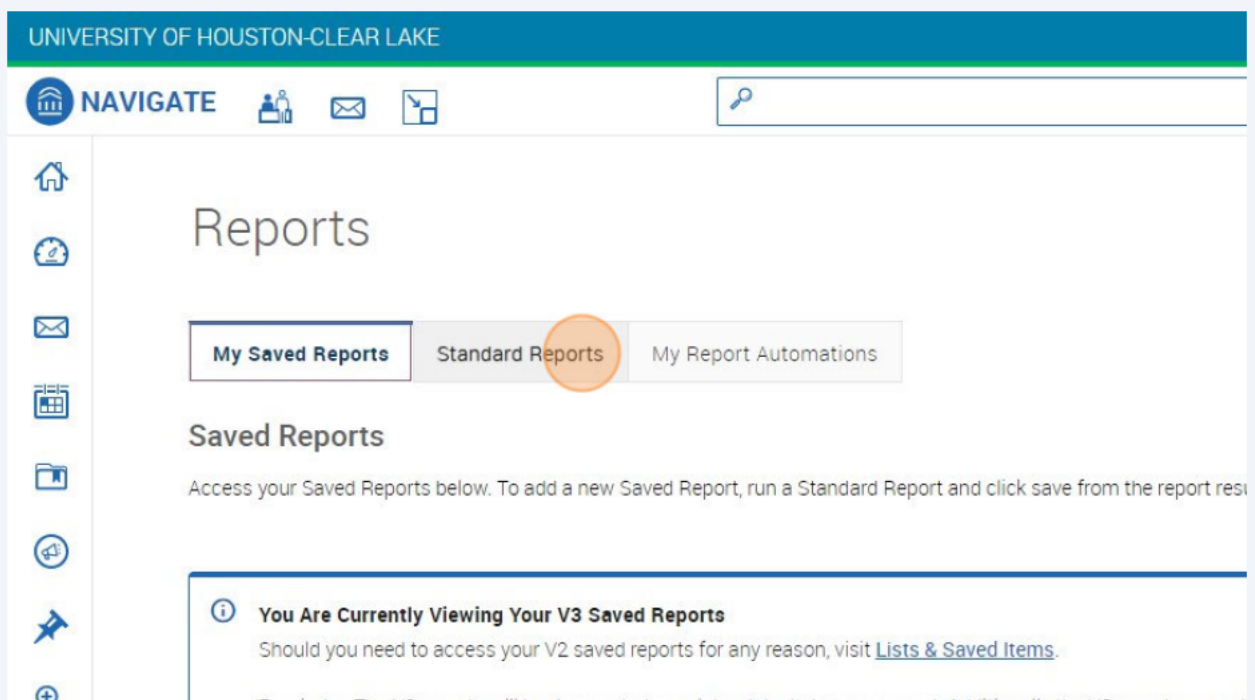
1 Log into Navigate <https://uhcl-campus.eab.com/>

The screenshot shows the 'Staff Home' interface in the Navigate system. At the top, there is a blue header with 'UNIVERSITY OF HOUSTON-CLEAR LAKE' and a 'NAVIGATE' logo. Below the header, there are navigation icons for home, calendar, mail, and a search bar. The main content area is titled 'Staff Home' and features a navigation bar with tabs for 'Students', 'Appointments', 'My Availability', 'Appointment Queues', and 'Appointment Requests'. Under the 'Students' tab, there is a section for 'Assigned Students' with filters for 'List Type' (Assigned Students), 'Term' (Fall 2023 (Default Term)), and 'Relationship Type' (All Relationship Typ). Below the filters, there is a table with columns for 'NAME', 'ID', 'STUDENT LIST', 'CUMULATIVE GPA', 'PREDICTED SUPPORT LEVEL', and 'CATEGORI'. The table contains one row with a checkbox and the number '1.' followed by a redacted area.

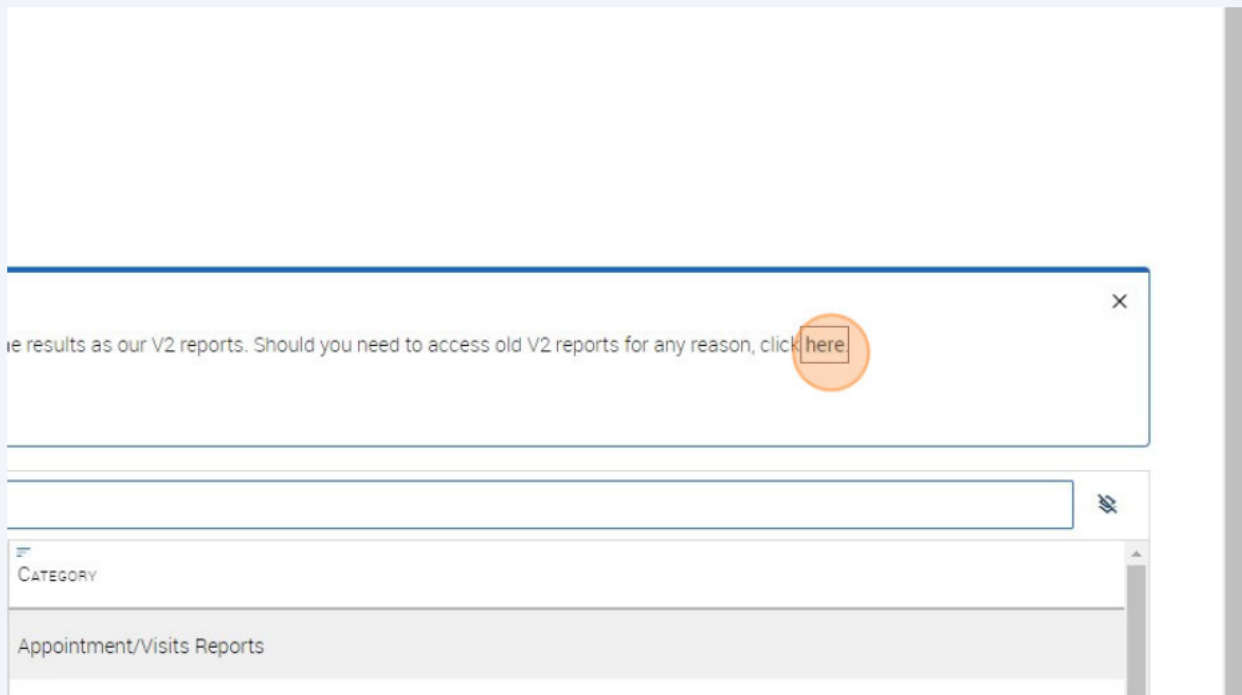
2 Click "Reporting"



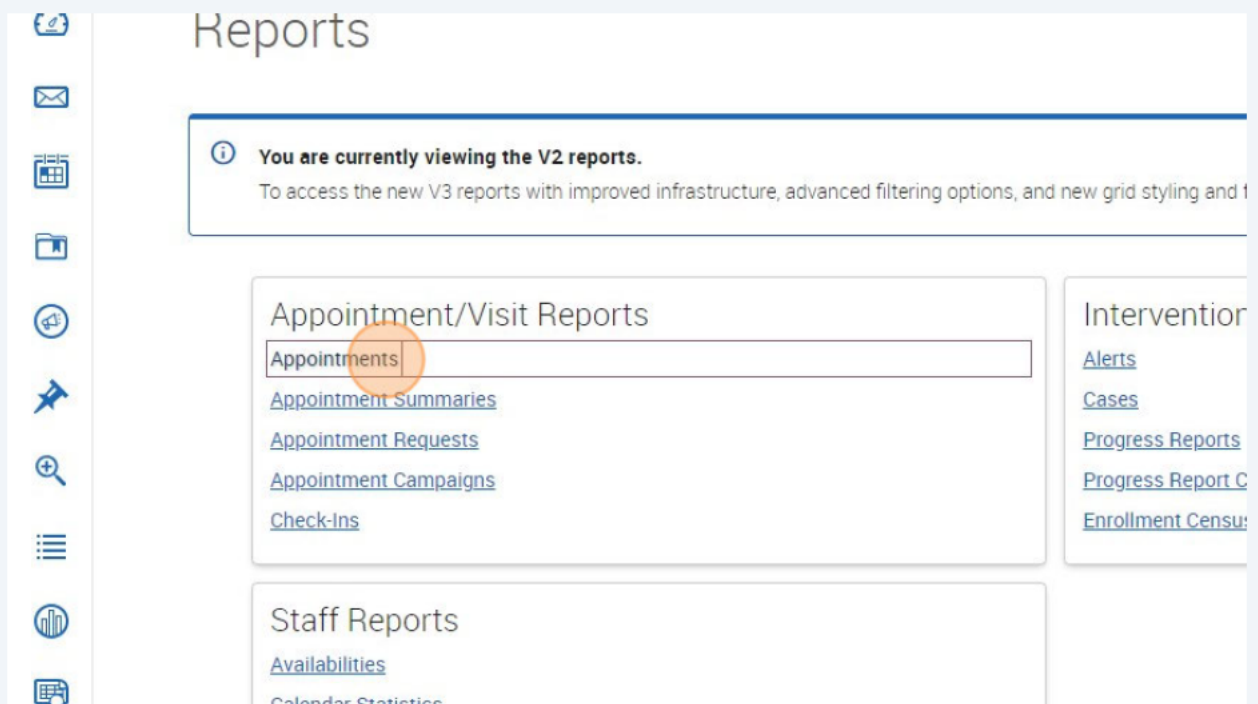
3 Click "Standard Reports"



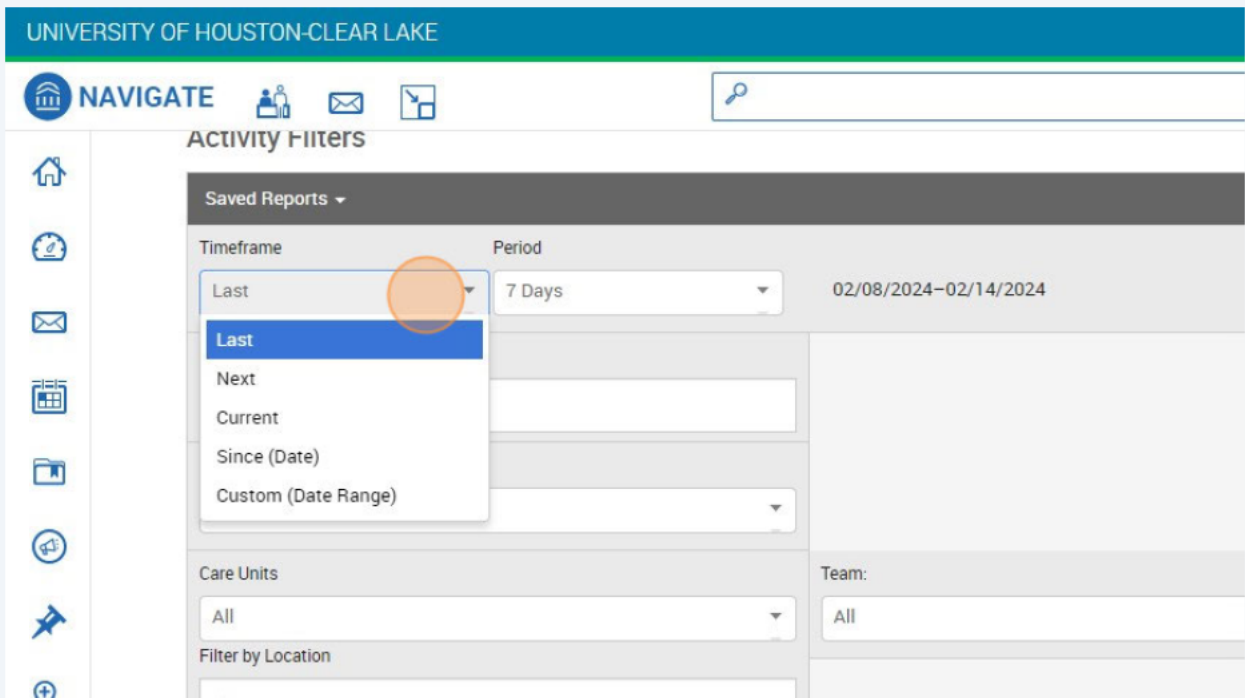
4 Click "here" to switch back to V2



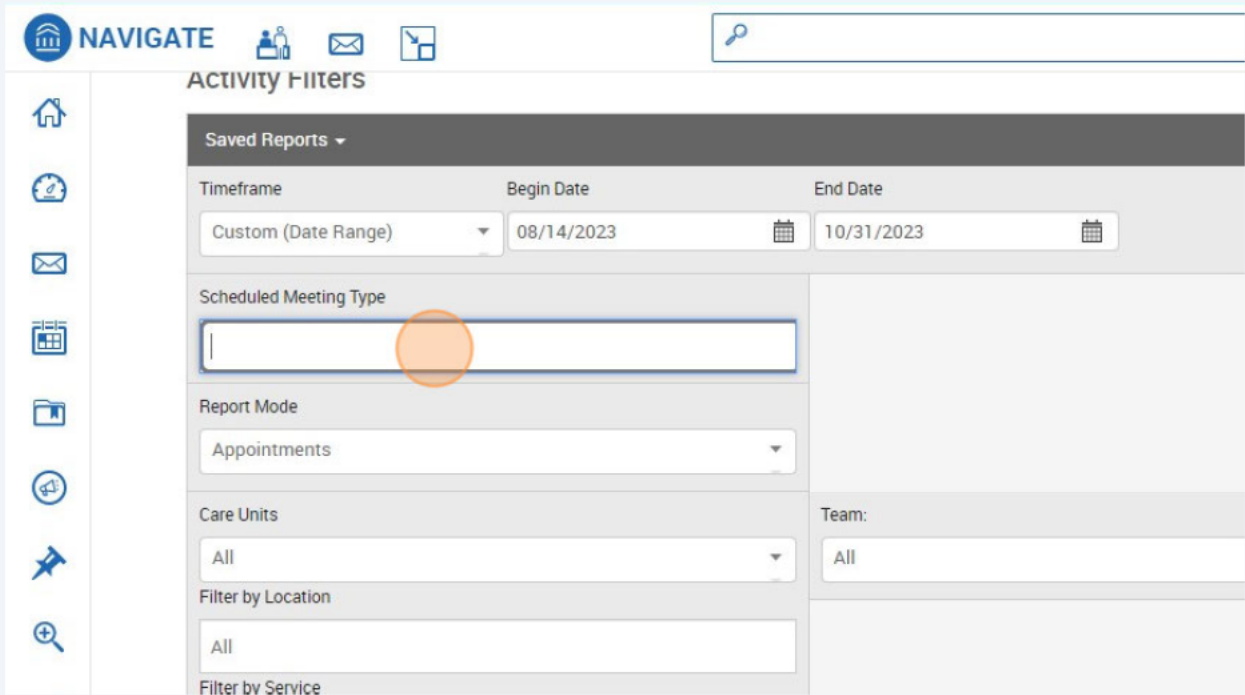
5 Click "Appointments" under "Appointment/Visit Reports"



6 Select the timeframe you would like to focus on for this report



7 For this example, I will be using the "custom" field to enter a custom date range



8

If you would like to only see specific meeting types, please select from the "Scheduled Meeting Type" list.

The screenshot shows the 'Activity Filters' interface. At the top, there is a 'Saved Reports' dropdown menu. Below it, the 'Timeframe' is set to 'Custom (Date Range)', with 'Begin Date' as 08/14/2023 and 'End Date' as 10/31/2023. The 'Scheduled Meeting Type' dropdown menu is open, showing a list of options: 'No Associated Meeting Types', 'Active For Scheduling', 'Email', 'Group', 'In-Person', 'Phone', and 'Virtual'. An orange circle highlights the 'Active For Scheduling' section. Below the dropdown, there is a 'Filter by Service' dropdown menu set to 'All'. On the right side, there is a 'Team:' dropdown menu set to 'All'. A vertical sidebar on the left contains various navigation icons.

9

For this example, I will select that I only want to see "In-person" and "Virtual" appointments. I recommend leaving the "Scheduled Meeting Type" field blank because if the advisor did not select a meeting type in their appointment summary, this field will be left blank in the data, so by adding filters to this field, you filter out the appointments who do not have meeting type data.

The screenshot shows the 'Activity Filters' interface with the 'Scheduled Meeting Type' field selected. The 'Timeframe' is set to 'Custom (Date Range)', with 'Begin Date' as 08/14/2023 and 'End Date' as 10/31/2023. The 'Scheduled Meeting Type' field is highlighted with a blue border and contains two selected items: 'x In-Person' and 'x Virtual'. Below it, the 'Report Mode' dropdown menu is set to 'Appointments', with an orange circle highlighting the dropdown arrow. The 'Care Units' dropdown menu is set to 'All'. The 'Filter by Location' dropdown menu is set to 'All'. The 'Filter by Service' dropdown menu is set to 'All'. On the right side, there is a 'Team:' dropdown menu set to 'All'. A vertical sidebar on the left contains various navigation icons.

10

Under "Report Mode" select if you would like to review students who had an appointment or did not have an appointment

Timeframe: Custom (Date Range) | Begin Date: 08/14/2023 | End Date: 10/31/2023

Scheduled Meeting Type: In-Person Virtual

Report Mode: **Appointments** (selected), Students Without Appointment

Filter by Location: All

Filter by Service: All

Team: All

Include Cancelled Appointments Include No Shows Report Filed Only Campaign Appointments Only

11

Select your Care Unit

Scheduled Meeting Type: In-Person Virtual

Report Mode: Appointments

Care Units: **Advising** (selected), All, Center for Student Advocacy and Community, Orientation and New Student Programs, Student Success Center, UHCL Libraries, Writing Center

Team: All

Report Filed Only Campaign Appointments Only

Student Filters

12 Select your Location

Report Mode
Appointments

Care Units
Advising

Filter by Location

- Academic Advising -UHCL Pearland Campus
- Business Advising**
- Education Advising
- Human Sciences & Humanities Advising
- Science & Engineering Advising
- Texas Medical Center
- Transfer Advising

Team:
All

Student Filters

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

13 If you would like to filter your appointment services in your report results, select them from the "Filter by Service" field

Care Units
Advising

Filter by Location
Business Advising

Filter by Service
All

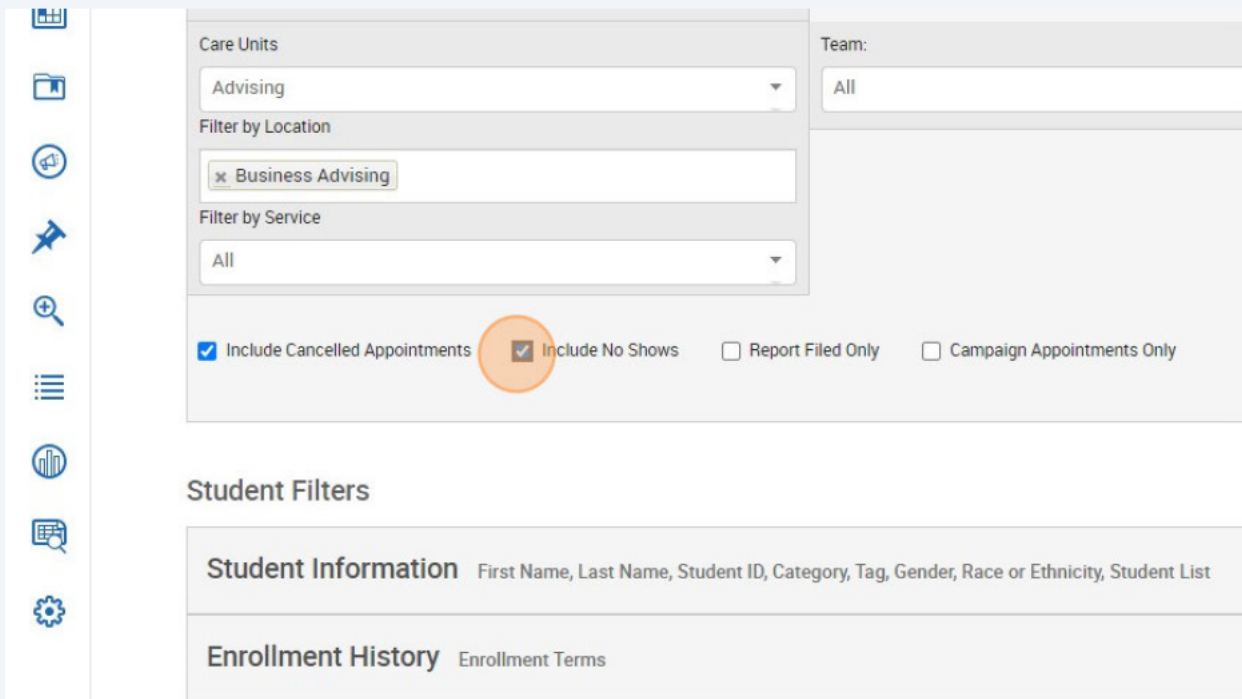
- All
- None
- Candidate Plan of Study (CPS)/My Degree Requirements
- Changes to my Schedule
- Choose Classes for Next Semester
- Drop-In Registration Assistance
- First Semester Advising

Team:
All

Enrollment History Enrollment Terms

14

If you would like to exclude no shows and canceled appointments in your results, deselect the "Include Cancelled Appointments" and "Include No Shows" checkboxes next to their field as shown here. Otherwise, you can leave these fields selected



Care Units
Advising

Filter by Location
x Business Advising

Filter by Service
All

Team: All

Include Cancelled Appointments Include No Shows Report Filed Only Campaign Appointments Only

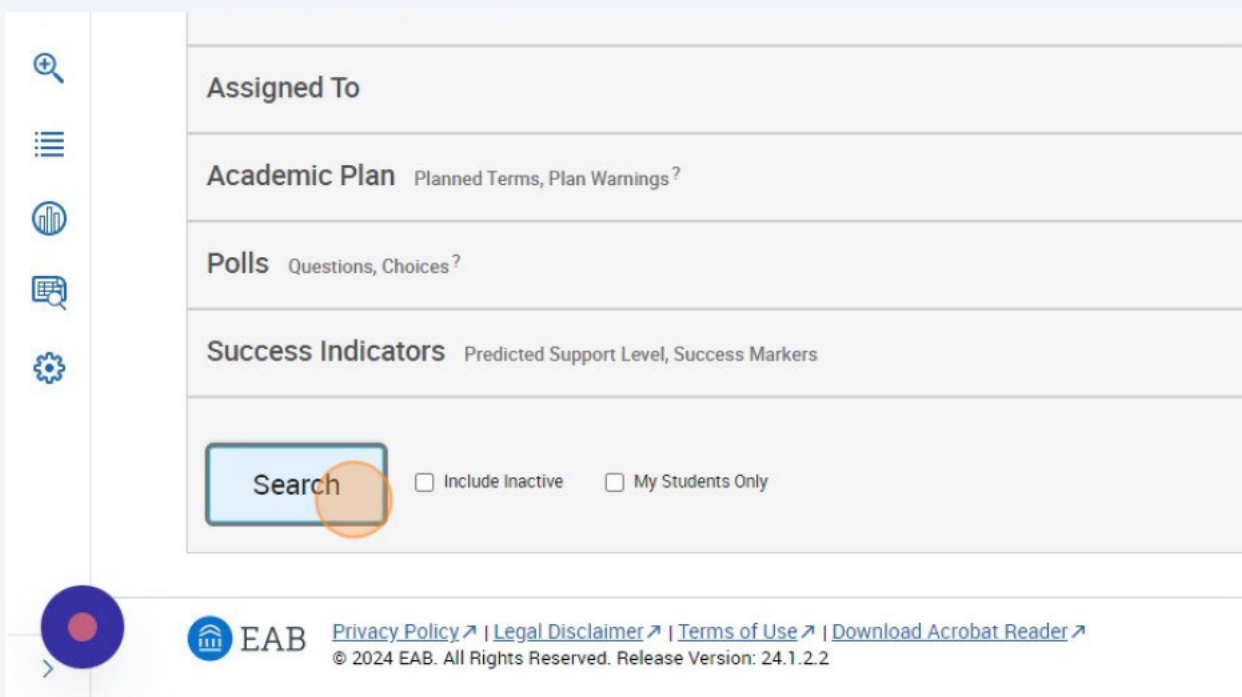
Student Filters

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

Enrollment History Enrollment Terms

15

Scroll down and click "Search"



Assigned To

Academic Plan Planned Terms, Plan Warnings?

Polls Questions, Choices?

Success Indicators Predicted Support Level, Success Markers

Search Include Inactive My Students Only

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16

Review your report parameters. You can also save your report by clicking the "Save" button to the right of "Unsaved Report". If you save your report you can revisit in under the "Lists and Saved Items" icon on the left tool bar (bulleted list icon)

Report Information

Unsaved Report

Save

Begin Date: 08/14/2023 x End Date: 10/31/2023 x Scheduled Meeting Type: In-Person & Virtual x

Search Modify Search

Actions

<input type="checkbox"/>	STUDENT NAME	STUDENT E-MAIL	STUDENT ID	CLASSIFICATION	MAJOR	SCHEDULE
1. <input type="checkbox"/>						

17

You can review your total results number at the bottom right of the results table

irtual

irtual

irtual

irtual

r-Person

378 total results

Page last refreshed at 4:19pm
All times listed are in Central Time (US & Canada)

Support

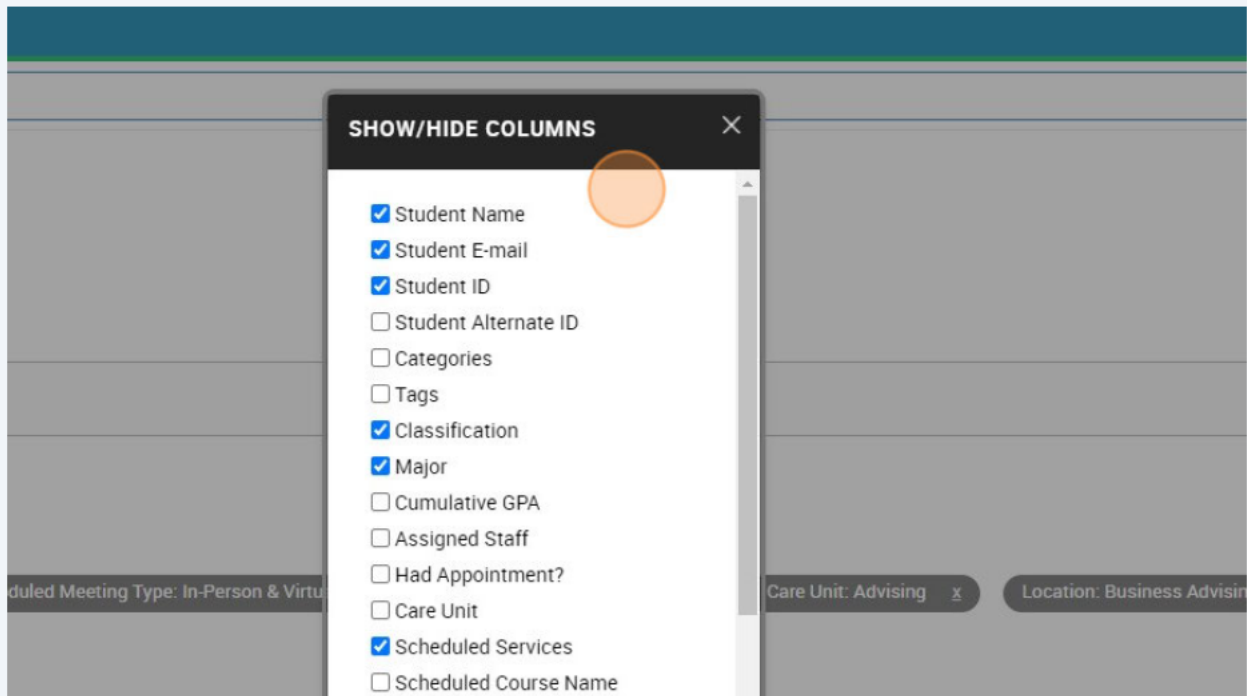
18 Click "Actions"

The screenshot shows the 'Unsaved Report' interface. At the top, there are filters for 'Begin Date: 08/14/2023', 'End Date: 10/31/2023', and 'Scheduled Meeting Type: In-Person & Virtual'. Below these is a 'Search' button and a 'Modify Search' link. The 'Actions' dropdown menu is highlighted with an orange circle. The table below has columns for 'STUDENT NAME', 'STUDENT E-MAIL', 'STUDENT ID', 'CLASSIFICATION', 'MAJOR', and 'SCHEDULE'. The table content is redacted with a black box.

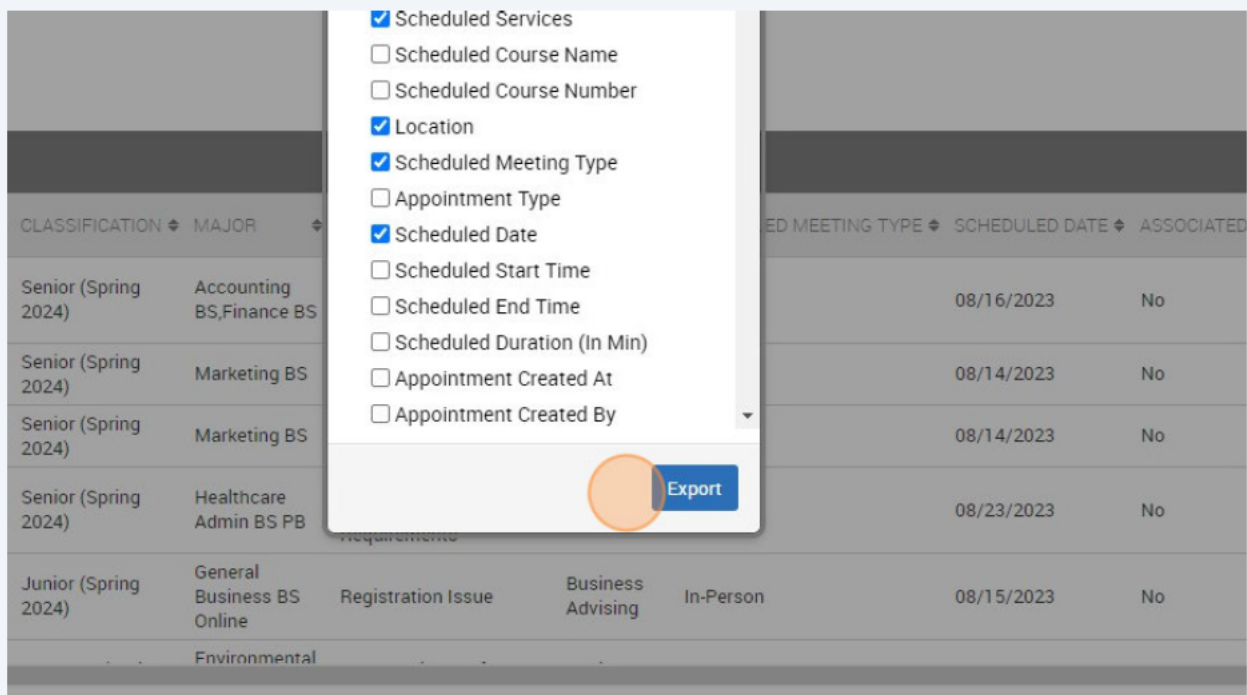
19 Click "Export Results" to export your report

The screenshot shows the 'Export Results' dropdown menu. The options are: 'Create an Appointment Campaign', 'Schedule Appointment', 'Tag', 'Note', 'Issue Alert', 'Add to Student List', 'Add To-Do', 'Show/Hide Columns', and 'Export Results'. The 'Export Results' option is highlighted with an orange circle. Below the dropdown is a pagination bar with 'Previous', '1', '2', '3', '4', and 'Next' buttons. The footer contains the EAB logo and links for 'Privacy Policy', 'Legal Disclaimer', 'Terms of Use', and 'Download Acrobat Reader'. Copyright information for 2024 EAB is also present.

20 Select the columns/data that you would like to include in your report



21 Click "Export".



22

You can also review other actions you can take with this data under the "Actions" button such as sending a message to these students, adding a note to their profile, etc.

The screenshot displays a web interface for an 'Unsaved Report'. At the top, there is a 'Save' button. Below it are three filter buttons: 'Begin Date: 08/14/2023', 'End Date: 10/31/2023', and 'Scheduled Meeting Type: In-Person & Virtual'. A blue 'Search' button and a 'Modify Search' link are also present. A dropdown menu titled 'Actions' is open, listing several options: 'Send a Message to Student', 'Create Ad hoc Appointment Summary', 'Create an Appointment Campaign', 'Schedule Appointment', 'Tag', 'Note', 'Issue Alert', and 'Add to Student List'. The 'Send a Message to Student' option is highlighted with an orange circle. In the background, a table header is visible with columns for 'STUDENT ID', 'CLASSIFICATION', 'MAJOR', and 'SCHEDULE'.