Generating Appointment Reports in V2 Reports

1. Log into Navigate [https://uhcl.campus.eab.com/](https://uhcl.campus.eab.com/)
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
If you would like to only see specific meeting types, please select from the "Scheduled Meeting Type" list.

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

11. Select your Care Unit.
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

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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
  - 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
- **Enrollment History**: Enrollment Terms
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.

15 Scroll down and click "Search"
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 it under the "Lists and Saved Items" icon on the left toolbar (bulleted list icon).

17 You can review your total results number at the bottom right of the results table.
Click "Actions"

Click "Export Results" to export your report
20  Select the columns/data that you would like to include in your report

21  Click "Export".
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.