

# EAB Navigate Resource Guide:

## How to Add Appointment Summaries and Report on Appointments

### Adding Appointment Summaries – “Notes” for Campaign and Appointment

This section details how to “add an appointment summary.” This phrase is utilized by EAB Navigate instead of “note” to indicate an official record of meeting. **If you are meeting with a student who has schedule through a Campaign or an Appointment (as opposed to a Drop/Walk-In), then it is BEST PRACTICE and STRONGLY RECOMMENDED that you add an appointment summary as detailed below.** Otherwise the system creates an additional appointment to house the summary.

1. Login to <https://umw.campus.eab.com> using your UMW single sign-on
2. Scroll down to the *Reporting* section making sure the **Recent Appointments** tab is selected

### Reporting

Recent Appointments	Recent Reports You Created
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3. Locate the specific appointment in the Recent Appointments table and click the **check-box**, ☐, adjacent to that student’s appointment
4. Then select the **Actions** drop-box and choose **Add Appointment Summary**

Actions ▾					
Add Appointment Summary					
Mark No-Show					
<input checked="" type="checkbox"/>	1/1	07/31/2019 09:31a - Ongoing	Transfer Onboard	N/A	Interested in Theatre - AB

5. This will bring forward the *Appointment Report for (Student Name)* window with prepopulated *Appointment*, *Care Unit*, *Location*, and *Service* fields based on the parameters of the Campaign or Appointment
  - a. You need only enter the details of your meeting in the **Appointment Summary** box

Appointment Summary

**B** *I* Paragraph

|

P

- b. You may add attachments as necessary by the **Select file to attach** option located just below the email box

**Add Attachment:**



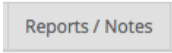

Select file to attach



- c. To finish, select the **Save and Check-out Student** button, , in the bottom right of the window

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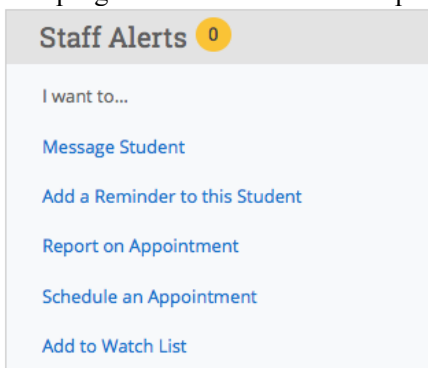
6. Review recently finalized reports back in the *Reporting* section under the **Recent Appointments** tab. The table entry for that appointment in the *Report Filed* column will no longer display *Not Yet* but will change to a clickable green **Report Details**, 
7. (Optional) To review older summaries:
  - a. Click on the **Quick Search** magnifying glass, , in the upper right hand of the page and type in the desired student's name. Then click the name
  - b. Select the **Reports/Notes** tab, , near the top of the student's profile page
  - c. Scroll down to *Appointment Summaries For (Student's Name)* and, from the table, click on **View Report**, , to access the appointment summary report

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### Adding a Report on Appointment – “Notes” for Drop/Walk-In

*This section details how to enter a “report on advising.” This is another phrase utilized by EAB Navigate instead of “note” to indicate an official record of meeting. **If you are meeting with a student as a DROP/WALK-IN meeting and the student DID NOT SCHEDULE IN ADVANCE through a Campaign or Appointment, then utilize the below steps to report on advising. If the student did schedule through a Campaign or Appointment, then utilize the preceding Adding Appointment Summaries – “Notes” for Campaign and Appointment section.***


1. Login to <https://umw.campus.eab.com> using your UMW single sign-on
2. Click on the **Quick Search** magnifying glass, , in the upper right hand of the page and type in the desired student's name. Then click the name
3. Locate the *I Want To...* box in the top right corner of the student's profile page

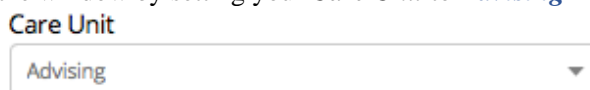


Staff Alerts 0

I want to...

- Message Student
- Add a Reminder to this Student
- Report on Appointment
- Schedule an Appointment
- Add to Watch List

4. Click on the **Report on Appointment**, , option to bring forward the *Appointment Report for (Student Name)* window
  - a. Begin at the left of the window by setting your *Care Unit* to **Advising**



Care Unit

Advising

- b. From among your *Location* options, select **Faculty Advisor Office**



Location

Faculty Advisor Office

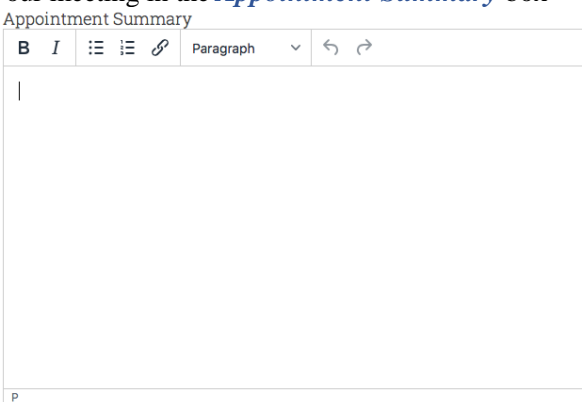
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- c. Select the *Service* that best matches the reason for the drop/walk-in meeting. (For example, you would select **Discuss a Course** if the discussion centered on one of your classes)

Service

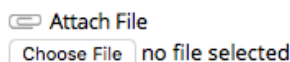
A screenshot of a web form showing a dropdown menu for the 'Service' field. The dropdown is open, and the option 'Discuss a Course' is selected and highlighted. The text 'x Discuss a Course' is visible within the dropdown box.

- d. Filling in the *Course* and *Meeting Type* boxes are optional as are the *Date of Visit* and *Meeting Start Time* and *Meeting End Time* options. Upon saving the report, the system will default to including the current date as the *Date of Visit*. The *Meeting Start Time* will default to the time you opened the *Appointment Report* window and the *Meeting End Time* will default to when you saved the report.
- e. Enter the details of your meeting in the **Appointment Summary** box

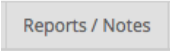
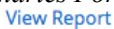
A screenshot of the 'Appointment Summary' text editor. The editor has a title bar 'Appointment Summary' and a toolbar with icons for bold (B), italic (I), bulleted list, numbered list, link, and paragraph. The main text area is empty with a vertical cursor. At the bottom left, there is a small 'P' icon.

- f. You may add attachments as necessary with the **Attach File** option located just below the *Appointment Summary* box

### Attachments

A screenshot of the 'Attachments' section. It features a button labeled 'Attach File' with a paperclip icon. Below it is a button labeled 'Choose File' and the text 'no file selected'.

- g. To finish, select the **Save this Report** button, , at the bottom right of the window
5. To review your report on advising (and all such reports):

- a. Select the **Reports/Notes** tab, , near the top of the student's profile page
- b. Scroll down to *Appointment Summaries For (Student's Name)* and, from the table, click on **View Report**, , to access the appointment report
- the appropriate **View Report**, [01/17/2019 01:00 PM](#), to access the appointment report