EAB Navigate Resource Guide: How to Enter Reports for Campaign Appointments

Part 1: Reporting on Appointments

This section indicates how to enter your appointment reports to associate the appointments with the campaign.

- 1. Login to https://umw.campus.eab.com using your UMW single sign-on
- 2. Click on the Appointments tab, located near the top of your profile page

Staff Home 🔻				
Students Appointments My Availability Appointment Requests				
Upcoming Appointments Care Unit: All Care Units 🔹				
Actions •				

3. At the top is the list of your Upcoming Appointments, scroll past this section to the Reporting section

Reporting

Recent Appointments	Recent Reports You Created

Recent Appointments

Care Ur	nit: All	Care Units 🔹							
Actio	<u>ns</u> ▼							∎Sh	ow Cancelled
		DATE 🗘	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT FILED?	DETAILS
	1/1	07/07/2023 10:00am - 10:25am ET	First-Year Orientation Advising	N/A			25 min	<u>Report</u> <u>Details</u>	<u>Details</u>
	1/1	07/07/2023 10:00am - 11:00am ET	First-Year Orientation Advising	N/A			60 min	Not Yet.	<u>Details</u>
	1/1	07/07/2023 9:00am - 9:15am ET	First-Year Orientation Advising	N/A			15 min	<u>Report</u> <u>Details</u>	<u>Details</u>
	1/1	07/07/2023 9:00am - 10:00am ET	First-Year Orientation Advising	N/A	Hello ! my preferred name is Hidaya (he- die-yah),		60 min	Not Yet.	<u>Details</u>

- 4. If you see a student's name only once with the green *Report Details* then you everything is good to go keep doing what you are doing ③
- 5. If you see something like the picture on the first page where the students are listed twice with only one green *Report Details* and the other lines says "*Not Yet*" the appointment report isn't being associated correctly with the campaign and you are probably going directly to the student's EAB page and reporting on your appointment there.
- 6. After your appointment do not go to the student's EAB page follow the steps above: go to your *Home* page and click on the *Appointments* and then scroll down to *Reporting*. Find the student that you met with and click the check box for that student's appointment.

Reporting

Care Unit: All Care Units



Recent Appointments

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	Action	<u>ns</u> ▼							Sh	ow Cancelled
			DATE 🗘	SERVICE	COURSE	COMMENT	ATTENDEE	TIME	REPORT ∳ FILED?	DETAILS
		1/1	07/07/2023 10:00am - 10:25am ET	First-Year Orientation Advising	N/A			25 min	<u>Report</u> Details	<u>Details</u>
(1/1	07/07/2023 10:00am - 11:00am ET	First-Year Orientation Advising	N/A			60 min	Not Yet.	<u>Details</u>
		1/1	07/07/2023 9:00am - 9:15am ET	First-Year Orientation Advising	N/A			15 min	<u>Report</u> Details	<u>Details</u>
		1/1	07/07/2023 9:00am - 10:00am ET	First-Year Orientation Advising	N/A	Hello ! my preferred name is Hidaya (he- die-yah),		60 min	Not Yet.	<u>Details</u>

7. Click on the drop-down Actions menu and select Add Appointment Summary



Recent Appointments Recent Reports You Created

Recent Appointments

C	are Uı	nit: All (Care Units	•						
	Actio	<u>ns</u> ⊾)					Sh	ow Cancelled
	Ad Ma	d Appoint ark No-Sh	ow	SERVICE	COURSE	COMMENT	ATTENDEE 🗘	TIME	REPORT FILED?	DETAILS
	lss	sue Alert	10.00am - 10.20am	First-Year Orientation Advising	N/A			25 min	<u>Report</u> Details	<u>Details</u>
		1/1	07/07/2023 10:00am - 11:00am	First-Year Orientation Advising	N/A			60 min	Not Yet.	<u>Details</u>
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8. This will bring up the appointment report for that student which has the appointment details automatically filled in and then you just need to enter *Major Interest* and the *Appointment Summary* and the click *Save this Report* at the bottom of the screen.

APPOINTMENT REPORT FOR JULIA FRANC	ск
Appointment Details	Summary Details For
First-Year Orientation Advising 07/07/2023 10:00am - 11:00am ET	Major interest
Appointment Campaign July 2023 FY Advising (Dasgupta Sectio >	Appointment Summary
Care Unit	B $I \rightarrow I - I = O$ Paragraph \checkmark \backsim
Advising	
Location Academic Services - Summer Orientati 🗙 🧹	
Service	
Course	Attachments
Start typing to search all courses 🗸 🗸	Choose File No file chosen
Meeting Type	
Select Meeting Type	
	3

Save this Report

Part 2: Associating Appointments with Campaign

This is only needed if your Reporting Tab is showing two appointments for the same student – like the picture on the first page

When you open your campaign and click on the *Summaries Created* tab is blank – follow the instructions below to fix this issue.

1. Click on the *Eligible Appointments* tab

<u>Appointment Campaigns</u> > July 2023 FY Advising (Dasgupta Sections

07/03/2023 - 07/28/2023

STUDENTS IN CAMPAIGN		APPOINTMEN 939 28 Stude	rs MADE 6 nts	APPOINTMENTS ATTENDED		SUMMARIES CREATED	
Appointments Scheduled	Some Appo	pintments Scheduled	Appointments N	ot Yet Scheduled	Summaries Created	Eligible Appointments	
Actions •							

2. Click on the square box in the gray heading at the top – this will select all of your appointments in this list

Appoi	ntments Schedul	ed Some Appointments Scheduled	Appointments Not Yet Scheduled	Summaries Created	Eligible Appointments	
This grid service, a	will display all eligi nd students selecte	ble appointments that have been scheduled o ed when creating the campaign.	utside of the campaign link. Eligible appointr	nents only include appointm	ents containing the same care	unit, location,
Actions	<u>.</u> *					
	INDEX	DATE	STUDENT	ORGANIZEF	SERVICES /	COURSE
	1	07/03/2023 10:00am ET		Hillyard, Dr	: Wes Advising	Drientation
	2	07/03/2023 11:00am ET		<u>Hillyard, Dr</u>	<u>. Wes</u> First-Year C Advising	Drientation

3. Then click on the Actions drop-down menu and select Associate Appointments

ļ	Appoint	ments Scheduled	Some Appointments Scheduled	Appointments Not Yet Scheduled	Summaries Created	Eligible Appointments	
Thi: serv	s grid wi vice, and	Il display all eligible Letudente celected v	appointments that have been scheduled o when creating the campaign.	outside of the campaign link. Eligible appointr	ments only include appointm	ents containing the same care	unit, locati
	<u>ctions</u> • Associ	ate Appointments					
ľ	-	INDEA	i e	STUDENT	ORGANIZER	SERVICES /	COURSE
	~	1 (07/03/2023 10:00am ET		Hillyard, Dr	Wes First-Year C Advising	Drientation
	~	2 (07/03/2023 11:00am ET		Hillyard, Dr	Wes First-Year C Advising	Drientation

4. EAB will then pop up the following window – click Okay

	umw.campus.eab.com says
-	These appointments will be added as part of this campaign. Do you
L	OK Cancel

5. This will then populate all of your appointment reports under the *Summaries Created* tab correctly – you don't have to do this if you are doing the reporting correctly in Step 1, but if you meet with a student "outside" of the campaign then you will have to do this and report on appointment directly from the student's EAB page.

If you have any questions – please let us know.

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